

SageCircle Mini-workshop on Analyst Briefings Interactions with Maximum Impact

Are you guilty of monologuing and death by PowerPoint?

Engage the analysts, don't annoy them

Among the top annoyances of IT industry analysts are vendor briefings where the spokesperson is **talking at** the analysts instead of having a **conversation with** the analysts. It also causes vendors to miss the opportunity to find out if their message is getting through. We have heard analysts often say: "If they had only stopped to take a breath and asked us what we thought, we could have eliminated the misunderstanding right upfront!"



*Do you waste
precious minutes in
your briefings?*

Execute the analyst briefing that drives results

SageCircle's Mini-Workshop on Analyst Briefings gives AR teams and spokespeople the knowledge, best practices and tools needed to ensure a successful briefing. We do this by ensuring that all important messages get across effectively and consistently.

Research...Experience...Insights...Training...Advisory

For more information e-mail info@sagecircle.com or call 650-274-8309



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SageCircle brings together the many elements needed for creating a best practice for effective analyst briefings. Our strategists talk to top AR practitioners and survey the analysts. Then we combine those elements with the practical real world experience of being AR managers and the frustrations of a top analyst who was on the receiving end of many, many bad briefings.

Workshop Objectives

- Fine tune the objectives & desired outcomes
- Hone the key messages & supporting content
- Bulletproof the presentations
- Search for inconsistencies
- Identify the players for the 5 key roles
- Prepare the spokespeople

In addition to the workbook and checklists, the workshop has training that provides critical insights for content developers and spokespeople, including:

- Using the “Analyst Hierarchy of Needs” to get inside the heads of the analysts
- What are the key mistakes made during briefings and how to avoid them
- How the analysts work and deliver client recommendations
- Why fewer PowerPoint slides are better and zero slides best
- Why analysts deliberately interrupt spokespeople.
- The role of confidential Information and NDAs



Phone-based inquiry is an integral part of the mini-workshop deliverable. That way AR teams and briefing participants have a lifeline when questions or doubts arise.

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What clients say...

“Carter is one of the leading thinkers and researchers about the industry analysts and the analyst relations profession. He is an engaging presenter and effectively handles executives who are skeptical about working with the analysts. Carter carefully listens to truly understand the crux of your business and situation before providing his insights and advice.”

Peggy O’Neill, VP of Analyst Relations, Oracle Corp.

The Mini-Workshop on Analyst Briefings is a structured method for communicating the knowledge and skills needed to ensure a vendor’s analyst briefings are successful. Every aspect of the briefing is evaluated and refined from the perspectives of former analyst insider and AR practitioner. Steps include:

1. SageCircle sends workbook, schedules first call
2. Client reviews questionnaire
3. Sponsor call to review the workbook, review questionnaire, review briefing objectives, analyze plan and offer suggestions, schedule training sessions and critique calls
4. Training session 1, for content developers and sponsor
5. Critique presentation, on phone or via email, potentially multiple rounds
6. Act as sounding board, multiple short phone calls or e-mails
7. Training session 2, for participants especially executive spokespeople
8. Post-mortem call to determine lessons learned to improve the next briefing

Pricing for this phone- and webinar-delivered engagement:

- Mini-Workshop on Analyst Briefings - \$795 as a standalone purchase
- Standard deliverable for Advisory Service clients

Purchase using credit card at www.sagecircle.com/workshop

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Strategists:

Carter Lusher (left) and Dave Eckert bring decades of experience in the analyst game to the seminar.

Dave has been an end-user client of the analysts, managed AR programs at multiple companies, was a member of the original SageCircle where he researched AR best practices and helped designed the original Architect analyst relationship management (ARM) software. Today he is a SageCircle co-founder and strategist as well as an ARchitect instructor.

Carter brings a unique 360 degree view of the analyst industry developed over 18 years. Carter has been an end user analyst client, an award-winning Gartner analyst, an analyst of the analysts, vendor analyst client and AR executive at HP. Today, Carter is excited about using SageCircle to expand the community's knowledge about the analysts and AR best practices.

Dave and Carter are also the leading experts on how to apply the ARchitect analyst relationship management (ARM) application to everyday AR activities.

**What clients say...**

"No matter what the perspective, when it comes to analyst relations - you will not find anyone in the business who is more knowledgeable than Carter. I've worked with Carter at three companies and am always amazed at his unconventional, yet comprehensive take on the technology industry. Now that he has served in all capacities - technology provider, analyst, analyst relations, and consultant - Carter covers all the bases for unbiased results. I recommend him 100%."

Cynthia Holiday, Upright Marketing

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