

SageCircle's Annual Advisory Service

The 14-Point Checkup

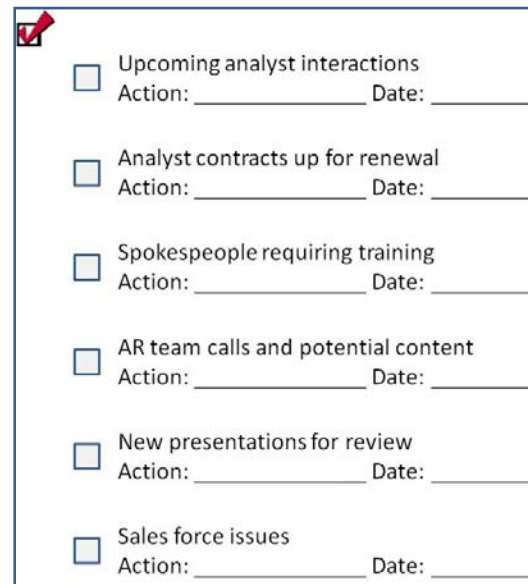
Maximizing Advisory Business Value

Making sure you get the most out of SageCircle

One of the key weaknesses of annual retainer-based advisory services model is that the analyst firms do not have a process for ensuring clients actually **use** the services they have purchased. As a consequence, at the end of the contract clients are hard pressed to demonstrate value received.

SageCircle solved this shortcoming by creating the 14-point Checkup . The Checkup is conducted on a regular basis – intervals depends on the client – to identify upcoming activities that a SageCircle inquiry, mini-workshop or executive briefings could help improve. Why a specific checklist? We discovered that merely asking if there was anything we could help with generally resulted in “No, I guess not.” However, by asking about a common task like “Are you working on a new analyst presentation?” elicited a “Oh yes, we’re working on a new analyst presentation?” elicited a “Oh yes, we’re working on a new analyst presentation?” Once identified, we could then set up some review calls to help fine tune the presentation.

The 14-point Checkups are quick and painless exercises that help clients maximize value from their SageCircle contracts.



- Upcoming analyst interactions
Action: _____ Date: _____
- Analyst contracts up for renewal
Action: _____ Date: _____
- Spokespeople requiring training
Action: _____ Date: _____
- AR team calls and potential content
Action: _____ Date: _____
- New presentations for review
Action: _____ Date: _____
- Sales force issues
Action: _____ Date: _____

Example items on the checklist

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

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



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