

## The Five Modules of AR Spokesperson Training

Analyst work is not pay-for-play, but it is pay-for-access. With access you do get better information (because you can read full reports) and therefore you can have a well-rounded dialogue. With that, you can better prepare for discussions, align positioning with research and make insightful decisions.

Research Related	Relationship/Insights Related
Analyst Inquiry	Vendor Briefing
Appeal for reconsideration/rebuttal	Major Evaluation Briefing
In-person analyst event meeting	In-person industry event meeting

- Analyst Inquiry - forum to get feedback and to influence their research
  - You want to ask an analyst a question, look smart and also drive a point home about how your company is addressing this issue she wrote about.
  - How can you do that effectively in just 30 mins? This module will focus on efficiency.
- Vendor Briefing - forum to share your company' s news, innovation, etc.
  - You have a lot to say about the changes in the industry, new products to introduce and a demo; but how will you get it all in and keep the conversation flowing?
  - In this session you' ll learn how to maximize the interaction and keep the Analyst coming back for more.
- Major Analyst Evaluation Executive Briefing
  - Whether it's a Forrester Wave, Gartner Magic Quadrant, IDC Market Scape or another important report, executive briefings are an essential part of the evaluation. Demos and slide preparations should be tailored accordingly.
  - Through this session you' ll learn how to prioritize and optimize that time and stand out from the other 12-18 vendors.
- In-person Interactions at Analyst Events or Industry Events
  - At Gartner and Forrester events (e.g. Symposium and Forums), the firms allow attendees to meet with analysts in a "speed dating" format limited to 20 minutes. In this module, you will learn how to optimize these short interactions and stick with them long after the event.
  - At industry events, analyst have little time between meetings but yours will be remembered if you learn some key tricks.
- Appeal for reconsideration / rebuttal interaction
  - After a piece of research is drafted (or published), you may be allowed to appeal for reconsideration. Note: This is a very special interaction and only happens after an executive briefing during the evaluation period.
  - You must prepare facts and supporting evidence in a special format to convince the analyst and her supporting team to change "dot placement."

Now that you have a plan to engage with analysts who review, rank, and recommend your company's services or products, let's work to make the most of that investment with each and every interaction with your top analysts.

Program options:

- Individual, 30-minute modules can be delivered to your spokespeople via web-conference or to small groups of 2-3 spokespeople.
- Half-day, on-site delivered to groups of 4-6 spokespeople.
- Modules can be customized based on previous training for an additional fee.
- Evaluation of existing knowledge of AR is recommended and can be collected via online survey or telephone discussion.

INTRODUCTORY OFFER:

Mock-briefing Evaluation - Your spokespeople can deliver a mock briefing and get feedback within 24 hours to best gauge areas of strength, improvement, style appropriateness as well as overall engagement value.



Cassandra Allen has nearly 20 years of marketing and analyst relations experience on both the client and agency side in organizations ranging from boutique wineries to the third largest communications agency in the world. Starting in 2011 at Razorfish, she single-handedly created and managed the Analyst Relations program that consistently resulted in the agency being rated at the top of the digital marketplace worldwide.

With skills in strategic influencer relations, relationship marketing, event and project management Cassandra has also trained an ever-expanding and evolving team of executives to optimize interactions with analysts. She has provided invaluable direction on industry analysts, key to the success of engagement with analysts in areas of commerce, digital experience and innovation consulting.

To learn more about the Spokesperson Workshop and/or to get a proposal please contact Cassandra at [cassandra.allen@keacompany.net](mailto:cassandra.allen@keacompany.net)