



Sample AR Team Training Modules Program Management

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LEGEND	
✓✓✓	Core module
✓✓	Recommended module
✓	Optional module

Program Management					
Strategies/Programs	Intended Audience			Min	✓
	AR Mgmt	Core Team	Extended Team		
Identifying, recruiting, and managing AR sponsorship <ul style="list-style-type: none"> Importance of active executive sponsorship at the corporate and business unit level; roles and responsibilities of an effective sponsorship team Building the case for strategic analyst relations; building executive awareness and confidence Sponsorship team communications: the monthly status report Sponsorship team communications: the quarterly program update Sponsorship team communications: the semi-annual program review Monitoring internal perceptions of AR effectiveness 	✓✓✓	✓✓		45	<input type="checkbox"/>
	✓✓✓				
	✓✓✓				
	✓✓✓	✓✓			
	✓✓✓	✓✓			
	✓✓✓	✓✓			
	✓✓✓	✓✓			
Identifying, recruiting, training, and managing an extended AR team <ul style="list-style-type: none"> Importance of establishing a formal extended AR team; roles and responsibilities of an effective extended team Building the case for active involvement of product managers and domain experts Extended team training requirements; building the AR Extended Team Training Plan Managing the extended team; integrating AR functions into job descriptions; integrating AR feedback into the performance appraisal 	✓✓✓	✓✓		30	<input type="checkbox"/>
	✓✓✓	✓✓			
	✓✓✓	✓			
	✓✓✓				
Training the core AR team <ul style="list-style-type: none"> Importance of establishing a formal training program; roles and responsibilities of an effective AR team Core AR team training requirements; building the AR Team Training Plan 	✓✓✓	✓✓		15	<input type="checkbox"/>
	✓✓✓	✓✓			
	✓✓✓	✓			
Establishing foundational processes <ul style="list-style-type: none"> Establish processes/policies for coordinating analyst lists across business units, markets, and/or segments Establish service level standards by tier to guide analyst outreach and support Establish cross-team processes/policies for coordinating responses to analyst requests for information 	✓✓✓	✓✓		60	<input type="checkbox"/>
	✓✓✓				
	✓✓✓	✓			
Developing and maintaining an annual Analyst Management Plan <ul style="list-style-type: none"> Analyst list maintenance plan Analyst support service levels Identification of external/internal triggers that drive analyst communications Coordinated rolling 12-month analyst interaction calendar Perception targets for key analysts/analyst firms Analyst opinion monitoring plan Executive sponsorship team management plan Extended team training and management plan AR team training plan Resource requirements Program budget and resource loading 	✓✓✓	✓✓		45	<input type="checkbox"/>
	✓✓✓	✓✓			
	✓✓✓	✓✓			
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	✓✓✓	✓✓			
Developing and maintaining an annual AR-Sales Integration Plan <ul style="list-style-type: none"> Analyst opinion monitoring plan Outbound sales communication plan Parameters for prioritizing sales opportunities requiring/requesting AR support Sales opportunity support service levels Sales leadership management plan Sales team training plan Sales impact monitoring plan Sales support rollout plan (for new initiatives) 	✓✓✓	✓✓		45	<input type="checkbox"/>
	✓✓✓	✓✓			
	✓✓✓	✓✓			
	✓✓✓	✓✓			
	✓✓✓	✓✓			
	✓✓✓	✓✓			
	✓✓✓	✓✓			
	✓✓✓	✓✓			
Developing and maintaining an annual Analyst Perception Monitoring Plan <ul style="list-style-type: none"> Strategic analyst list maintenance plan Executive buddy program plan Analyst consulting day parameters and plan Periodic assessment of analyst perceptions plan Internal communications plan 	✓✓✓	✓✓		30	<input type="checkbox"/>
	✓✓✓	✓✓			
	✓✓✓	✓✓			
	✓✓✓	✓✓			
	✓✓✓	✓✓			
Developing and maintaining an annual AR Measurement Plan <ul style="list-style-type: none"> Prioritization/selection of measurement objectives Definition of measurement criteria for each selected objective Specification of performance targets for 6- and 12-month time horizons Balanced scorecard that incorporates performance targets and weighting factors 	✓✓✓	✓✓		30	<input type="checkbox"/>
	✓✓✓	✓✓			
	✓✓✓	✓✓			
	✓✓✓	✓✓			