



# Sample AR Team Training Modules Program Management

© 2008 Analyst Strategy Group, LLC.

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

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