

## The ES Research Group Deliverables and Methodology

**Title:** The ES Research Group Deliverables and Methodology

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**Summary:**

*At the core of ESR's research methodology is a thorough, comprehensive and accurate evaluation process, focusing on relevance, timeliness, integrity, and complete independence from any vendor or provider.*

**Commentary:**

**The ESR Research Deliverables and Methodology**

**1. Introduction**

ES Research Group (ESR) provides timely, easily-accessible, authoritative, independent, and high-quality research, analysis, assessment, insight, and advice to sales organizations regarding the evaluation, acquisition, implementation, and management of effectiveness solutions. ESR is your trusted source for premier, unique, independent research, insight, and advice to enable informed decisions on selecting, implementing, and managing sales and marketing effectiveness solutions, a term we use to encompass sales training, sales methodology, sales consulting and related supporting programs, functions, tools, services and products. **We deliver premium subscription-based or a la carte analytic and assessment reports, timely and insightful online seminars, and custom inquiry responses.**

**2. Our Deliverables**

**1. ESR/Insight™:** Each *ESR/Insight* is a two- or three-page, online, analytic, premium-value, pithy, commentary-style article. While an *ESR/Insight* may include condensed information available from vendors and trade press in a digestible form, *ESR/Insights* primary goal is to provide independent and invaluable assessments, reviews, analyses, and action-oriented advice not available from any other source. Each *ESR/Insight* ends with a specific take-away actionable message that we label "To The Point."

**There are five types of ESR/Insights:**

- ▶ **Core Issues:** ESR frames its research and analysis about ES and *sales training/consulting providers* around a series of *Core Issues*, a set of foundation questions which we introduce, frame and define annually in *ESR/Insights* whose type is "Core Issues" (see our kickoff *ESR/Insight Core Issues*), and which we will update periodically. Core Issues are a set of fundamental problems and challenges framed as questions that sales organizations universally face and to which ESR

**Our Mission**

Our mission is to be the leader in providing companies with what they need to know and do to maximize their sales effectiveness through the employment of processes and training.

ESR offers a range of premium subscription-based or a la carte analytic and assessment reports, timely and insightful online seminars, and custom inquiry responses. We are the trusted source for premier, unique, independent research, insight, and advice to enable informed decisions on selecting, implementing, and managing sales training and consulting companies.

provides its ongoing research, analysis, assessment, advice, and recommendations in its series of research publications. Core Issues are fundamental, mission-critical questions that do not have obvious answers, but rather require intense research, experience, and analysis that ESR provides in its series of publications. Thus the Core Issues constitute what one might call our “research agenda.”

- ▶ **Market Outlook:** This type of *ESR/Insight* analyzes the sales training/consulting market as a whole and/or comparatively analyzes multiple providers at a high level. It also is used to provide timely analysis on industry news. Examples of the Market Overlook type of *ESR/Insight* are an introductory market analysis that is published prior to delving into a sector; a comparative analysis of multiple providers; examining key trends in the sector; providing a year-end wrap-up of key findings; and forecasting events in the industry for the following year.
- ▶ **Sales Training/Consulting Provider Assessment:** The Sales Training/Consulting Provider Assessment type of *ESR/Insight* is an analytic profile of an individual provider. Core to ESR’s publication series, it reviews the offerings of the provider in a standard condensed format, but beyond that will provide a critical assessment of the offering, the strengths and weaknesses of the provider, and will articulate when a sales organization should consider that provider’s offerings vs. other alternatives.
- ▶ **Strategies and Guidelines:** This type of *ESR/Insight* covers a range of implementation issues, such as selection criteria in choosing a sales training/consulting partner, negotiating guidelines with providers, case studies and best practices in implementing Sales Effectiveness Solutions, measuring cost and effectiveness of solutions, and “how to” tips and guidelines.
- ▶ **Common Inquiries:** ESR analysts respond to questions posed to them online by their Gold-level clients. A portion of such inquiries tend to be common questions which stimulate our publication of this type of *ESR/Insight* derived from the most commonly submitted inquiries. Such questions will always be “cleansed” and paraphrased to remove any client-identifying or confidential information.

**2. ESR/InDepth™ Report:** Each *ESR/InDepth* report is a 50- to 150-pages in length. It typically integrates a set of *ESR/Insights* developed over a period of time into a single cohesive in-depth report. Like *ESR/Insights*, these are premium-value, highly analytic reports with information, analysis, and recommendations that cannot be obtained from other sources, but delve into the issues more deeply. Examples of topics covered by an *ESR/InDepth* Report are an analysis of the sales training/consulting market and comparative analysis of the top-tier of providers or strategies and guidelines for the successful implementation of sales effectiveness solutions. We produce approximately four *ESR/InDepth Reports* each year.

### 3. Our Research Principles

The following are the key characteristics that ESR products deliver:

- ▶ **Timely:** ESR content is delivered regularly and contain the latest industry information and analysis.
- ▶ **Accessible:** ESR deliverables are easily accessed online in a highly-condensed, consumable, and appealing format.
- ▶ **Authoritative:** ESR deliverables are written by veteran sales performance industry experts and top analysts who have thoroughly studied and analyzed sales effectiveness solutions and the vendors that provide them. The company’s CEO is a renowned consultant and author on sales effectiveness.
- ▶ **Independent and High-Integrity:** ESR is completely independent of any sales training/consulting provider. While providers may purchase subscriptions or individual reports, they have no influence on our

research or advisory positions. The integrity of ESR's analysts is impeccable. ESR is the only source in the industry to provide unbiased, critical appraisals of providers and independent advice on their successful implementation.

- ▶ **High-quality:** ESR information and analyses are thoroughly researched through a proprietary, meticulous research methodology which we describe briefly below.

The combination of attributes of ESR products provides the following **benefits** to sales organizations:

- ▶ **Enabling Selection of the Right Sales Performance Improvement Provider:** ESR enables sales organizations to evaluate and select the appropriate sales training/consulting provider from among the many choices on the market, thus ensuring that the right decision and investment is made. Stated another way, ESR provides an "insurance policy" to sales organizations to prevent them from engaging with a provider that is not appropriate for their needs. The result is greater sales productivity and increased revenue for the customer as well as prevention of an ineffective, costly expenditure.
- ▶ **Providing the Best Price:** Over time, with its industry intelligence and interactions with users, ESR enables sales organizations to negotiate the best possible price with their selected provider, thus saving them additional money.
- ▶ **A Resource for Best Practices:** With its knowledge of best practices, and case studies in implementing and managing effectiveness solutions, ESR's deliverables will offer techniques and tips for maximizing success with those solutions.
- ▶ **A Source of Timely Information:** ESR's timely and authoritative reports and alerts can prevent costly incorrect decisions in acquisition or implementation.
- ▶ **A Trusted, Virtual Personal Advisor:** The ability of Gold members to access the analysts/authors for custom advice enables clients to apply ESR's general advice to their particular situation. Thus, they are able to make optimal decisions in both the selection and implementation phases of sales performance improvement initiatives.

#### 4. The Research Process

Our proprietary and rigorous research process has as its goal to deliver research that reflects our research principles enumerated above of timeliness, independence, integrity, accessibility, authoritativeness and quality. The following are some of the key elements of our research process:

- ▶ **Beginning with Public Domain Information:** Our research begins with a thorough study and evaluation of information about the sales performance improvement market, its best practices, and sales training/consulting providers and their product offerings. Such information is derived from provider web sites, product literature, and product materials as made available to us. We evaluate providers and their offerings with respect to a common framework that we enhance and refine as we evaluate additional providers.
- ▶ **Interviewing Sales Training/Consulting Providers:** Providers will typically cooperate with us so as to be included in our research publication series. We conduct a series of interactions by phone and in person, sometimes initiated by us and other times initiated by providers when they wish to update us on their offerings. We ask a series of probing questions based on a methodical framework and our experience in the industry.
- ▶ **Canvassing, Surveying, and Interviewing Sales Executives, Provider Executives, and Other Sources:** While we check references that providers offer to us, we make sure that we use reliable additional sources of primary knowledge of and experience with specific providers and their solutions. Our rich network of sales executives, sales training managers, sales managers, and sales training/consulting

provider executives, and constant interactions with them provide us with excellent intelligence and perspectives. Over time, this provides our experienced analysts with a pattern and triangulated conclusions. In addition we periodically canvass our network of sales professionals with common framed questions so as to derive a pattern and conclusion.

- ▶ **Experience:** Unlike “market research” firms, our research is not conducted by junior telemarketing surveyors, but rather by experienced and seasoned veterans of the sales training industry who draw upon their own experience and intimate knowledge of the industry. Thus judgments and conclusions are based on intelligent qualitative interactions with sources of information and upon our own knowledge, rather than on mechanical “scores.”
- ▶ **Hypothesis/Validation/Refinement Cycle:** With the above set of sources of information, assessment, and opinions, hypotheses or “tentative conclusions” are established. These “stakes in the ground” are then further tested both internally within ESR in group discussions for a “sanity check” as well as by trusted and expert sources in the industry. Each ESR publication is reviewed by a scrutinizing and challenging editorial process by veteran research-process experts. Thus a given conclusion or publication goes through multiple revisions until a high-confidence perspective and analytic piece is ready for publication.
- ▶ **Vendor Rebuttal Opportunity :** When an *ESR/Insight* is about a sales training/consulting provider, in the interest of accuracy and fairness to all parties, we will send a draft publication to the vendor with an opportunity to comment within 48 hours. (The same holds true about each vendor’s “section” in our annual Sales Training Vendor Guide.) The intent here is to provide an opportunity to point out factual errors, which upon verification we will correct, as well a to provide them with an opportunity to attempt to convince us that our conclusions require modifications. Under no circumstances will a provider have a voice in our opinions or recommendations. Those remain ESR’s.
- ▶ **Mining Inquiries:** Another excellent source of insight both into sales effectiveness practices as well as evaluation of particular providers is the mining of our growing body of inquiries from clients. Gold-level clients submit inquiries to us about issues of concern to them. In the course of interacting with clients, patterns emerge in their concerns and views about sales effectiveness solutions and specific training and consulting providers. Thus we gain unique perspectives over time by mining this rich set of client issues.
- ▶ **Constant Refinement:** Our findings and conclusion are not static and closed after a publication. Our research is an ongoing process with new information and insights constantly evolving. We will revisit issues and enhance and update our positions.

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