Blade Servers / John Doe
April - 2008

Measure

Knowledge Assessment
Blade Systems - John Enck
April 2008

Vision & Strategy				
Products & Solutions				
Implementation & Support				
Go-To-Market				
Positioning & Differentiation				
Competitive Position				
Confidence in Ability to Execute				

Knowledge Assessment
Blade Systems - John Enck
Jul 2007 - Apr 2008

- ◆ Vision/Strategy
- ◆ Products/Solutions
- ◆ Impl/Support
- ◆ Go-To-Market
- ◆ Pos/Differentiation

● Position
● Confidence

Very Good / Good / Fair / Limited / Very Limited

Jul-07 · Oct-07 · Jan-08 · Apr-08
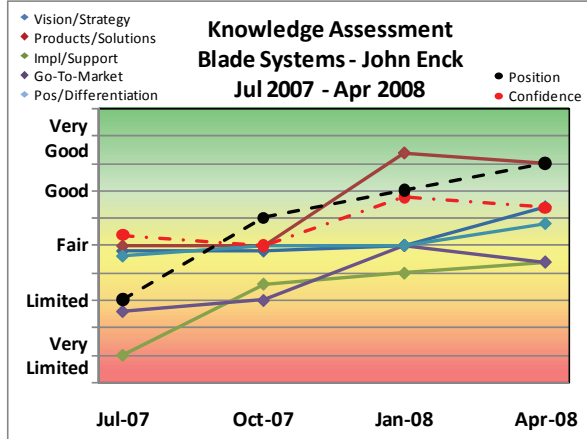
Qualitative Assessment

Vision/Strategy: Qualitative commentary regarding John's assessment of (*Company*)'s vision and strategy, with particular emphasis on whether strategy is compelling, aligned with industry trends, and differentiated from competitors

Products/Solutions: Qualitative commentary regarding specific products and solutions, with particular emphasis on strengths and weaknesses, and differentiation

Impl/Support: Qualitative commentary regarding the completeness of the implementation ecosystem and (*Company*)'s overall ability to provide implementation and longer-term support around its blade solutions
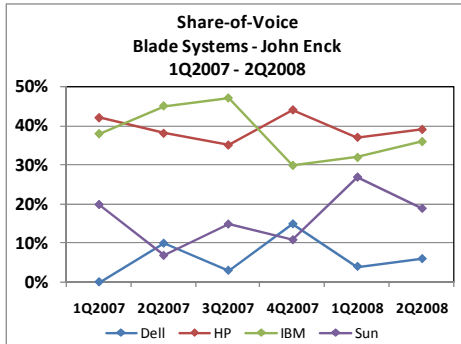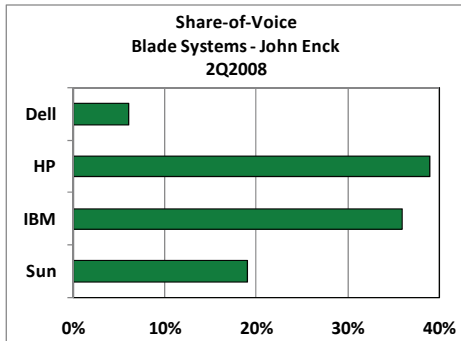
Go-to-Market: Qualitative commentary regarding (*Company*)'s value proposition, messaging, and integration with direct and channel sales organizations

Position/Differentiation: Qualitative commentary regarding (*Company*)'s position vis-à-vis key competitors, with specific focus on comparative strengths and weaknesses
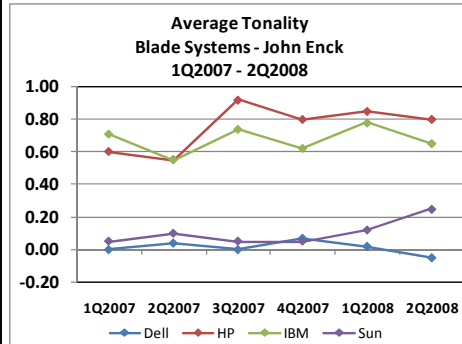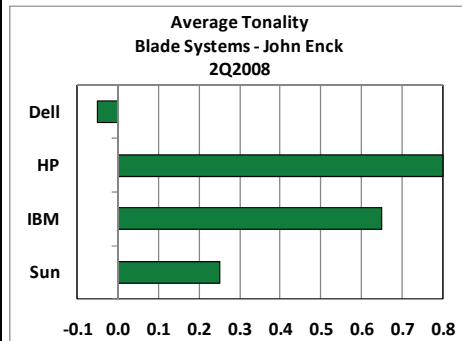
Confidence: Qualitative commentary regarding analysts' level of confidence in (*Company*)'s ability to execute against the stated strategy and product roadmaps, with specific highlight of any areas of concern regarding execution capabilities
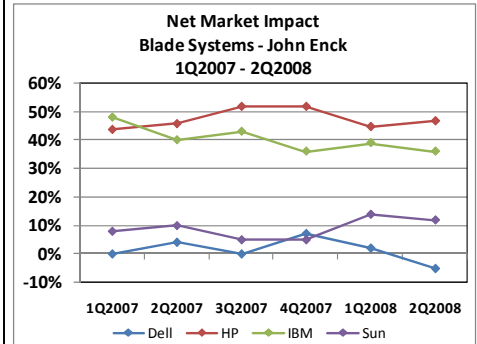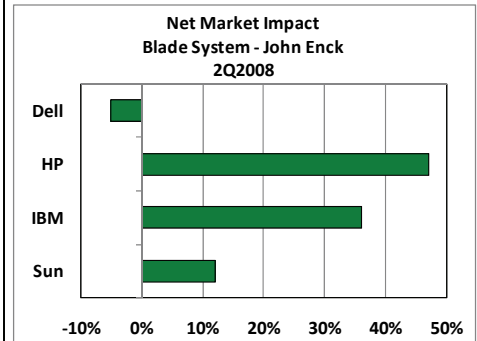
Monitor

Share-of-Voice

Share-of-Voice
Blade Systems - John Enck
2Q2008

Dell / HP / IBM / Sun

0% · 10% · 20% · 30% · 40%

Share-of-Voice
Blade Systems - John Enck
1Q2007 - 2Q2008

1Q2007 · 2Q2007 · 3Q2007 · 4Q2007 · 1Q2008 · 2Q2008

Dell — HP — IBM — Sun

Tonality

Average Tonality
Blade Systems - John Enck
2Q2008

Dell / HP / IBM / Sun

-0.1 · 0.0 · 0.1 · 0.2 · 0.3 · 0.4 · 0.5 · 0.6 · 0.7 · 0.8

Average Tonality
Blade Systems - John Enck
1Q2007 - 2Q2008

1Q2007 · 2Q2007 · 3Q2007 · 4Q2007 · 1Q2008 · 2Q2008

Dell — HP — IBM — Sun

Net Market Impact

Net Market Impact
Blade System - John Enck
2Q2008

Dell / HP / IBM / Sun

-10% · 0% · 10% · 20% · 30% · 40% · 50%

Net Market Impact
Blade Systems - John Enck
1Q2007 - 2Q2008

1Q2007 · 2Q2007 · 3Q2007 · 4Q2007 · 1Q2008 · 2Q2008

Dell — HP — IBM — Sun

ASG
making AR strategic for marketing and sales

Blade Systems
April - 2008

Interpretation

Analyst Impact: Interpretation of how analyst's level of knowledge and confidence, and analyst's perception of (*Company*)'s ability to execute is playing out in the analyst's research - and how this is impacting what the analyst is likely communicating to prospects/customers via Inquiry

Sources of Concerns: Identification of specific concerns related to:

Relationship w/(*Company*) - concerns regarding frequency of contact, timeliness of responses, awareness of analyst's coverage focus, etc.

Content Sufficiency - concerns regarding depth or breadth of communications in specific content areas

Vision/Strategy - concerns regarding the alignment of strategy with market trends, breadth and scope of vision, translation of vision into do-able strategy, awareness of challenges, etc.

Products/Solutions - concerns regarding specific features/functionality, alignment with market, etc.

Marketing - concerns regarding messaging, market resonance, coordination of messages across teams, etc.)

Confidence - concerns regarding sufficiency of proof points, market uptake, delivery capabilities, etc.

Market Context: Identification of important contextual events

(*Company*) Announcements - impact of product/solution announcements, earnings announcements, etc.

(*Company*) Events - impact of Summit, Regional Events, etc.

Competitor/Partner Announcements - impact of product/solution announcements, earnings reports, etc.

Competitor/Partner Events - impact of XYZ's Analyst Conference, ABC's Analyst Conference, etc.

Recommendations

General Observations: Prioritization of sources of concern and discussion of which lie within AR's purvue

Basic Relationship Management: Identification of adjustments or re-prioritization of activities necessary to address identified analyst concerns

Basic Communications: Identification of additional content and/or strategies for improving the timeliness of sharing information

Strategic Communications: Identification of specific venues, formats, and/or mechanisms for sharing details of vision, product roadmaps, ecosystems, GTM strategies, etc - including strategies for working with product management to increase comfort level around establishing a dialog with strategic analysts.

Strategic Relationship Management - Identification of specific venues and strategies for increasing/improving the active dialog between key analysts and product/executive management

*making AR strategic
for marketing and sales*