

# Medium Enterprise Financial Services Company

## Introduction

This case study of a medium enterprise financial services company is based on an April 2017 survey of The Skills Connection customers by TechValidate, a 3rd-party research service. The profiled company asked to have their name blinded to protect their confidentiality.



“The Skills Connection understand the influencer business and are incredibly supportive. They helped focus our team throughout a complex vendor evaluation process and helped to manage the expectations of our management team.”

“They are very professional, consistently honoring all commitments, and they quickly became an integral part of our team. What impressed me most, however, was the way they rallied to our support when we faced a difficult negotiation. You can count on The Skills Connection to provide good guidance and to stand by you no matter what.”

## Challenges

The business challenges that led the profiled company to evaluate and ultimately select The Skills Connection:

- Engaged with The Skills Connection for the following reason:
  - Wanted to change their position in the MQ/Wave/Marketscape to generate new business

## Use Case

The key features and functionalities of The Skills Connection that the surveyed company uses:

- Uses The Skills Connection to:
  - Provide the necessary expertise to effectively engage analysts
  - Show them how to gather the right information for analysts
  - Show them how to effectively communicate their story to analysts
  - Help them improve their position in an MQ/Wave/Marketscape
  - Provide the tools and best practices needed to build a strong case for analysts
  - Create compelling evidence-based cases for analysts

**“The briefing presentation and product demos that we developed for this evaluation were much stronger than they would have been without their guidance. We learned from that process and will be able to apply that knowledge in future evaluations.”**

## Results

The surveyed company achieved the following results with The Skills Connection:

- Experiences gained with The Skills Connection:
  - The ability to create a strong evidence-based case to analysts covering their product / service
  - The skills needed to communicate with analysts in the future
- Benefit from working with The Skills Connection:
  - Provided their internal team the tools and skills to effectively engage with analysts
- Agrees with the following statements:
  - Met their internal schedules and deadlines: strongly agree
  - Ensured they met schedules and deadlines for the analysts: strongly agree
  - Facilitated the co-ordination of activities across their internal response team: agree
  - Acted as an extension of staff: strongly agree
  - Enabled them to focus on what was needed and avoid wasting time on anything else: agree
- Agrees with the following statements:
  - Collaborative: strongly agree
  - Knowledgeable: strongly agree
  - Service-oriented: strongly agree
  - Value for money: agree
  - Best practice focused: strongly agree
- Rates The Skills Connection as 5 out of 5 stars.

### Company Profile

The company featured in this case study asked to have its name publicly blinded because publicly endorsing vendors is against their policies.

TechValidate stands behind the authenticity of this data.

Company Size:  
**Medium Enterprise**

Industry:  
**Financial Services**

### About The Skills Connection

The Skills Connection helps technology companies to get the right results from analyst engagement. They work with technology clients that want to optimize their chances of success in a Gartner MQ or Forrester Wave assessment. In addition, they work with elite analyst firms, providing coaching and training services to sharpen delivery and improve client satisfaction and renewal rates.

**Learn More:**

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