

Interactive Technology Research and Advisory Services



Jim Lundy - CEO

About Aragon Research

Aragon Research is the newest technology research and advisory firm. Aragon delivers high impact interactive research and advisory services to provide enterprises the insight they need to help them make better technology and strategy decisions.

Aragon Research serves business and IT leaders and has a proven team of veteran analysts. Aragon is based in Morgan Hill California and also has offices on the East Coast. For more information, visit <http://www.aragonresearch.com>

Interview conducted by: Lynn Fosse, Senior Editor, CEOCFO Magazine

CEOCFO: Mr. Lundy, what is the premise and concept behind Aragon Research?

Mr. Lundy: The premise and concept is really the idea of helping to provide business advisory services around technology and publish research that basically helps people understand what is going on in technology related markets and then helping them to figure out things that they could do to leverage those technologies in their business or their enterprise.

CEOCFO: What do you understand, fundamentally, about the process that allows for a superior or more in depth approach?

Mr. Lundy: That is a good question. Myself and some of my team have been business executives, so we have actually been in some of the jobs of the clients that we work with. Therefore, there is a lot of business experience that comes to fore. I did wear another helmet. At Gartner I was a managing vice president for twelve years. The idea was to help them to get to a billion dollars in revenues before I left. The think the thing that helps us help clients is that we have been in some of the similar jobs, so we understand about applying the technology, not just talking about the speeds and the feeds of a particular technology or in the market. Therefore, it is the practical advice, as well as the analysis that we put in the written and the interactive research that is giving us more permission and more recognition that we are going a little bit further than, again, not just pontificating. I think we are smaller and our focus is on clients success, not just on signing as many clients as we can, but actually helping them, focusing in their needs and having regular interactions, not just making them get in line and wait to be able to talk to an analyst. When other firms were smaller they used to do that. People get big and it gets more impersonal. Therefore, there are advantages in speed and agility when you are smaller, that sometimes you do not have as much when you are larger.

CEOCFO: What might be some of the common engagements with a client and something a little more outside the box?

Mr. Lundy: The majority of our clients are signing up for access via an annual subscription and they generally also try to plan a year in advance of regular meetings. Instead of just saying to sign up, we will onboard you. You have access to the research and we are done, it is where we actually talk about scheduling meetings on a regular basis. We have a way that they can access our research that is community based. We are shifting away from just logging into a website, searching for a research note and downloading it. We actually have a social network based community where the research is there and people can interact with each other. However, we generally track it every month. We are actually looking at, for example, did we interact with this client? If it does not show up on the dashboard, then we need to reach out and say, "Hey, we did not have a meeting scheduled. Should we schedule a meeting?" The other thing that would be different is that I got a lot of feedback before I started Aragon Research. Out here in Silicon Valley people like to meet face to face, not just over the phone. In the markets that we are in, which are the West Coast and the Mid Atlantic all the way up from Washington to Boston; we are in those markets every week. Therefore, the people that work with us in those markets; we say, "We will actually come and spend an hour with you in your office, not just force you to dial up the analyst and do it remotely." That adds to many clients satisfaction. It is also just a better way to interact with clients and sometimes good things happen when you are talking face to face.

CEOCFO: Do you think most people understand the value of face to face, but because the trend is to use conferencing, it is accepted as just as good?

Mr. Lundy: It is interesting. When they have experienced it they think it is a big deal. However, I did actually get a lot of feedback when I was at my old firm, because I did do it there. The comment they made was, "You have a big team and you actually came to see us and we know there are other people that live here that will not come to see us." That was part of the genesis for the reason to make change and found a company. Also, there was not that much competition for them. It is not the lead story about us, but it is one of the things for the people that we work with, that they do find of value and they think is great.

CEOCFO: With so much changing in technology, thinking, trends and ideas, how do you put that in to your valuation in a way that makes sense?

Mr. Lundy: We are constantly monitoring markets and events. For example, this week IBM and Apple announced a strategic partnership that is going to shake the mobile market to its core and we wrote a piece that we are actually publishing today. However, we have research methodology that we use to watch markets. We do not try to cover every market. However, the markets we are covering, we are not only watching, but interacting and providing advice. We are also writing things on an annual base where we are predicting how these markets will change. I did a webinar this morning and was with thirty CIO's yesterday, talking about the top ten technologies for 2014 and beyond. What we were talking about was what we had put in our predictions research piece at the beginning of the year. We gave a copy of that research out, because it was more in depth than just a slide presentation. However, when you are covering market there are tricks of the trade, but it is about constantly monitoring and evaluating what has worked and what did not work, is that technology mature and what is not. We have a research methodology that we call a technology arc, where we evaluate technologies, whether they are emerging or being adopted or they are mature and we publish that every year. We talk about why something like machine learning went from an emerging arc to adopting. The data points we got indicate that many more people are using machine learning and big data than they ever have, so we moved it further over. Again, it is a constant thing that you have to keep up with. You have to be on your game. You have to be watching markets. There is obviously a lot of reading and interacting, both with people that are using the technology and the people that are making the technology and the technology providers. That is really trying to net out what the secret sauce is about how a great industry analyst firm really watch their market and evaluate it.

"We focus on client success and we focus on doing great research analysis." - Jim Lundy

CEOCFO: What has changed in how you conduct business or how you look and do the research from where you started to where you are today? What have you learned along the way?

Mr. Lundy: A couple of things. One is that we said that the world was going to change relative to content and that it was going to be more about interactive content. We said that in 2011, we said it in 2012 and 2013. Pretty much the way we were sharing our knowledge was via a printed electronic PDF type document that people would access or they would view on the website. What we learned is that is changing. Creating videos is easier. Therefore, what we learned and then we put into action is that we started creating the idea of interactive research, where you would still have a PDF document, but we started adding as of April this year, interactive videos into the research publication. Not all of them; it is a small percentage now, but it is growing. Before you called I was actually working with some of our team on designing the next set of interactive research. Therefore, the idea of just communicating things in a visual manner; sometimes in a much shorter amount of time you can convey thousands of more data points. That is because human beings today are literally trained in interactive content. They have grown up watching television. There are videos on their tablets and they like that kind of modality. When we started three years ago that was not on the road map. It is constant feedback. Again, we have internal feedback, where it was one of our analysts on the team that said, "We say video is becoming pervasive. Why do we not do that ourselves?" There we took that input and we brainstormed it and we figured out a way to do it. If you would have asked me when I started the firm, "Was that on the road map," that actually was not. However, that was some of the learning that we got. We got a huge reaction from the market. That is why we are going to do more of it, since we launched it in April.

CEOCFO: How is business?

Mr. Lundy: Business is very good! We are growing!

CEOCFO: How do you reach prospective clients? Where do you focus your efforts?

Mr. Lundy: We have a website. We measure activity on it. We publish a monthly newsletter. We do blogs on our website. We do written blogs. We do video blogs. We have actually had a couple of summer interns here in California working with us and they are whizzes at video and we have been doing a lot of that. We have done Twitter campaigns. We are doing more promotional things. Some people find us because they saw us on someone else's website where someone had linked to our blog. I would probably say that if you look at the marketing mix it is kind of classic marketing. We are not perfect, but let us put it this way; one of our account executives was with a CIO the other day and we had just given that

person a pen that said Aragon Research on it and some other team was in saying, "Why are you using Aragon's pen" and they said, "Well, because they gave us one." Yes, we do some branding. We give out real nice water bottles with our logo on it. We do have a dedicated, full time marketing manager that does regular campaigns every month on social media as well as just regular newsletters. The other thing that we did this year is we have re-branded. We created a new logo for Aragon Research. It has got a little interactive button next to it. Again, that is the marketing team that did that; I had nothing to do with that. Many people have said, "Wow! That is really innovative! That is really cool! Who did that for you?" I said, "Our marketing team did it!" Those are some of the things that we are doing. We do public speaking, so I have got a number of key notes that I am doing at events this fall and other analysts are, too. However, I would not say that we are doing anything that revolutionary. We always want to do more. However, we are living within our means and running the business. I would say that we had a huge uptick in the last six months, mainly because we added the full time marketing manager.

CEOCFO: *What might be different at Aragon a year from now?*

Mr. Lundy: I think one of the things that might be different is that we would probably be larger. We keep adding people every quarter. I think the amount of interactive will probably be greater. We have a prediction that video documents will be more ubiquitous than text documents by the end of 2018, so we are trying to do what we say. I would say it is not easy, but we definitely will have much more interactive content a year from now. The word is spreading on that. I think others will probably end up copying us, but that is not a bad thing.

CEOCFO: *Why pay attention to Aragon Research?*

Mr. Lundy: We focus on client success and we focus on doing great research analysis. We have been rated by people that have read our research and they say, "That is some of the best research we have ever read." When I was at Gartner I had the top research team for three years in a row, because we really focused on writing great research, and they still do. However, we have a full time editor. Many small, startup research firms do not invest in having a great editor. We do. I know you work for a publication, so you can probably relate to that. However, we do take our time in making sure a research note is ready to go before we put it out there. We have a lot of checks and balances that we use before we publish a piece of research, because it is all about quality. We had one client that went to a large conference that had three thousand people at it. We did not know this, but they put us up on stage and, "Killer content; you get it from Aragon Research." I had other clients that were in the audience texting me and saying, "Hey, this firm just announced that they use some of your content and they thought it was killer!" We did not ask them to do that. We did not know they were doing that. Then other clients said, "This is really cool! We are really glad that we work with you."

BIO: Jim Lundy is the founder and CEO of Aragon Research, an Industry Analyst firm that focuses on Technology Research and Business Advisory Services. Jim serves as Lead analyst for, social collaboration, content management, learning, talent management and knowledge. Jim has over 29 years of technology and management experience as a vendor, user and analyst. Jim spent twelve years at Gartner and where he formed and led the Collaboration and Social Software Research Team and also served as lead analyst for Enterprise Content Management and Corporate Learning. Jim has extensive experience in product strategy, development and go-to-market plans. He has also been a Sales and a Marketing leader.

Prior to founding Aragon Research, Jim was the VP/General Manager of the Collaboration Business Unit at Saba Software. Jim also spent fifteen years at Xerox Corporation in a variety of software and hardware sales and marketing positions. Jim has a B.S. in Finance from Penn State University.

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