

Enderle, analyst extraordinaire, is everywhere in Silicon Valley

January 14 2009, By Mike Cassidy

Rob Enderle answers the door at his house in the East San Jose foothills and he's on the phone. Of course he is. It's what he does. Talk. Talk. Talk.

For those who follow the technology industry, Enderle sometimes seems like the most-quoted man in America. Newspapers, blogs, TV, radio, magazines. When a big story breaks in Silicon Valley - Steve Jobs missing Macworld, Google getting into mobile phones, Yahoo courting Microsoft, or not - the calls start.

"I will take probably a call anywhere from every 30 minutes to every 15 minutes for five hours or so" when a big story is breaking, he says. Sometimes beginning with predawn calls from reporters on the East Coast, or in Israel, or wherever.

"Then I'll start getting calls back to back. Then the local affiliates will start sending over their trucks. It's really quite fun."

Enderle must think it's fun. It's not his job. Not really. Enderle is an independent tech analyst - one of a number of experts who make a living studying market trends and business strategies and offering tech companies advice and constructive criticism. Cisco Systems, Microsoft and Intel are among his clients.

Watch what you read in the next couple of days. I bet you'll see his name. Then it will be like learning a new word. You'll see "Enderle"

every time you turn around. It happened to me, and it got me wondering: How does someone become a noted expert, a quote machine, a media go-to guy?

Which is why I'm in Enderle's living room, which serves as the conference room for the Enderle Group. And why he's ending his phone call, only to immediately receive another.

Earlier in the day Enderle agreed to chat before a 3:30 p.m. interview with CNBC Asia. Much earlier in the day (4 a.m.) he was up and off to a studio in Mountain View, Calif., for a Fox News interview. Turns out the feed went dead 20 seconds into Enderle's segment.

"I thought it was a great 20 seconds," he'd joke later.

On the day I visited, Enderle had already racked up quotes on the National Public Radio Web site, in the New York Daily News and on the Agence France-Presse wire. The day after we spoke, he appeared in several publications, including the West Australian in Perth. The day before we talked, he was quoted on MarketWatch and in The New York Times.

Yes, it's good for the analyst business to be out there. Visibility often translates into credibility. And Enderle, who has an MBA from Long Beach State, says reporters' questions sometimes give him insights into issues he hadn't thought of before. Just how often is he quoted, anyway?

"In a good year, I'll probably hit 3,500."

This week has been a slow one, Enderle tells me once he finishes his call and sits down. Macworld without Jobs is a dud. The Consumer Electronics Show starts the next day. ("I fly out at the crack of dawn tomorrow," he says.) So it's the calm before the storm.

OK, so how did Enderle get to be one of the ones to go to? He says he started out with big research firms - DataQuest and Giga, which became Forrester. He was called by reporters and quoted often in those roles. He ended up in Rolodexes.

"If you eventually go independent and survive," Enderle, 54, says, "you have credibility."

The secret, then, is to return reporters' calls - and to be right more often than you are wrong.

Ah, credibility. The tech analysts' world is a murky one. At times they are called upon to comment on companies they contract with. Conflict of interest is inherent. Enderle says he tries to insulate himself from playing favorites, or appearing to, by using a business manager to negotiate his contracts. He also works almost exclusively on retainer - reducing the opportunities for clients to manipulate him by awarding or refusing to award contracts.

"It's an imperfect dance," he says, "but it's the best I've been able to devise."

Enderle talks about the analyst game the way athletes talk about the big game. What's one of his biggest challenges in the media spotlight? When a TV reporter comes up with an unexpected question during a live shot.

"As much as that scares the crap out of me," he says, "I've got to tell you, it's an adrenaline rush like nothing else."

And now, he says, it's go time. Enderle hops into his car and races to North San Jose for his CNBC interview. He's seated at a small desk staring into a camera, right on time. After a minor glitch, he's on.

"Well, I think the big news at Macworld was that the big applause was when Tony Bennett was singing."

A clever way to say not much happened. The questions from the anchor in Asia keep coming, heard only by Enderle through his custom-made ear piece. What about the resiliency of tech? The Alcoa layoffs? The stock market? And then: "We should be clear," Enderle says.

Next, it's out the door, earpiece still in place, headed for his car. There are calls to be taken.

(Mike Cassidy is a technology columnist for the San Jose Mercury News. Read his Loose Ends blog at blogs.mercurynews.com/Cassidy and contact him at mcassidy@mercurynews.com or (408) 920-5536.)

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Distributed by McClatchy-Tribune Information Services.

Citation: Enderle, analyst extraordinaire, is everywhere in Silicon Valley (2009, January 14)
retrieved 25 April 2024 from
<https://phys.org/news/2009-01-enderle-analyst-extraordinaire-silicon-valley.html>

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