

# Gartner Analyst Relations Newsletter

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The Gartner Analyst Relations Newsletter is a free e-mail newsletter published on a quarterly basis. It is a tool designed to provide analyst relations professionals with insight and best practices on how to best engage with Gartner for your success.

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Dear Colleagues:

As we wrap up 2009, we wish to extend our sincere thanks for the time and effort many of you contributed to the [Gartner AR Community](#) throughout the year. Your feedback on Gartner program improvements and insights into AR best practices continue to drive improvements in effectiveness and efficiencies within Gartner and the AR Community.

Our first article this quarter is an [interview with Peter Sondergaard and Michael Yoo](#) about the December 1 announcement of the intended Gartner [acquisition of AMR Research](#). As we continue to field questions from AR professionals, this interview serves as the [latest update](#) on some key questions our clients have regarding the acquisition, which officially closed on December 21. We look forward to updating the AR Community in a [webinar on January 7, 2010](#), where we will discuss further details of the integration.

As part of our ongoing efforts to interview key AR Community clients, we are excited to have [Nancy Pearson, Vice President, IBM Software Group](#), share her perspectives on AR and how she leverages analyst expertise to drive success in her organization. Her insights about analyst relations are especially timely, as in this challenging business climate, AR professionals are increasingly driven to work closely with marketing to fill the sales pipeline and adapt to new influencing channels driven by global adoption of social media.

Thanks are in order for our AR Community members who attended the AR Forums in Orlando, Cannes and Sydney at this fall's Gartner Symposium/ITxpo. Gartner executives Gene Hall and Peter Sondergaard enjoyed the opportunity to discuss their latest perspectives on Gartner and Gartner research strategies, respectively, and to listen to your questions and concerns. In addition to providing a snapshot of the [survey results](#) from the AR Forums, we also provide some perspectives on one of the key question areas fielded by Gene and Peter: the vendor briefing scheduling process. In the interest of answering this question, we've interviewed [Pam Miranda, manager of vendor briefings](#), to recognize your concerns, address some of the questions raised at the AR Forums and communicate Gartner metrics for managing the vendor briefing process. We see this interview as a way to foster further AR Community collaboration toward continual improvements in this important area.

As always, we cover [new analyst arrivals](#) this quarter. Plus, Gartner VP and product manager for the Gartner Analyst Relations offering James Stanton provides an update on a [new Gartner tool called Gartner Market Statistics](#),

## James's Corner



James Stanton  
VP, Gartner High-Tech  
& Telecom Programs

A Message From a Gartner  
Product Manager

an easy way to access Gartner forecast and market share data. In addition, James points to recent enhancements within the Gartner for IT Leaders role-based research, including coverage of client-specific projects like cloud computing, virtualization and many other initiatives that you as high-tech providers include in your offerings and marketing campaigns.

We look forward to updating you on the AMR acquisition and integration in our upcoming [webinar on January 7, at 10:30 a.m. EST](#), so save the date! In meantime, if you have any questions, please contact us.

Regards,

Jeff Golterman

## **Gartner Acquires AMR Research: A Webinar With Peter Sondergaard and Michael Yoo**



Peter Sondergaard  
SVP, Gartner Research

On December 1, Gartner announced its intended acquisition of AMR Research. On December 3, we held a webinar for the Gartner AR Community to share our perspectives and answer your questions. Our webinar speakers, Peter Sondergaard, senior vice president, Gartner Research, and Michael Yoo, senior vice president, Gartner High-Tech and Telecom Programs, talked about the strategic fit between Gartner and AMR as well as how the complementary nature of the two companies will benefit Gartner and AMR clients.



Michael Yoo  
SVP, Gartner High-Tech  
& Telecom Programs

For your convenience, we've included a transcript of the interview I conducted with Peter and Michael covering a wide range of issues, and answering many of the questions we received from you during the webinar and via Twitter. Please read through the interview for clarification on many areas.

Additional discussion and answers to questions on such topics as research agendas, Magic Quadrants, AMR client relationships, and AMR programs and client contracts are available through the webinar replay. You can listen to the webinar by going to the AR Community portal on [gartner.com](#). Under Announcements, select Listen to AR Community Announcement.

In the months ahead, we will provide support to the vendor community for the expanded range of products, services and associates. We will keep you up-to-date on developments through the regular AR quarterly webinars and newsletters beginning in Q110.

For pressing AR questions and inquiries, please contact us at [arcommunity@gartner.com](mailto:arcommunity@gartner.com) or speak to your account representative.

## **What changes will happen immediately?**

**Michael Yoo:** For the remainder of the year, we are going to continue to operate as “business as usual” — as two separate and independent companies. We announced the agreement for the acquisition this week, but there’s a period of time before we actually close the deal, which we anticipate later this month. We’ll begin the process of integrating our companies in the new year. What we wanted to do today was share some early thoughts on what that integration is going to mean.

If you want to know a lot of the financial details and related information, look on [gartner.com](http://gartner.com) for the official announcement. You’ll find lots of official details regarding the transaction.

## **What were some of the reasons that Gartner pursued AMR, and what do we see as some of the outcomes of the combination of the two companies?**

**Peter Sondergaard:** We view this as being an extremely positive acquisition. We have tremendous respect for AMR. They’ve been able to create a capability around supply chain management that is unrivaled across the globe, within their research and consulting capabilities and also within their events organization. They have a highly talented sales organization and service capability. They have an incredibly well-recognized and respected brand among large global organizations. And they are an extremely well-run and successful company. We think the combination, therefore, makes great sense, and it’s an opportunity for both companies.

Supply chain management in its broadest definition primarily would focus around the business aspects, and the process aspects are a critical issue for major companies across the globe. Supply chain management is linked to information technology, and AMR is the world leader in supply chain management. From a research perspective, the organization will get a much wider footprint in the market through the Gartner distribution channel. Gartner has approximately 1,000 salespeople and operates in 82 countries. The combination, therefore, of the world-class supply chain capability that exists in AMR and the Gartner distribution channel is, in our view, a great opportunity for both companies. Once we get into the new year, AMR salespeople will in addition be able to sell the entire Gartner product portfolio, as is obviously the case in terms of Gartner salespeople being able to sell the AMR capabilities and products. The bottom line, therefore, is that this is really a great opportunity.

## **What are your thoughts on how that great AMR analyst team will be merged into Gartner research?**

**Peter Sondergaard:** First and foremost, and I think this is really important to state, is that it is our intent to retain all of the AMR analysts and, in fact, everybody in the research organization in AMR. Our plan is to keep the AMR research organization as a distinct research area. After the deal closes, we will keep the AMR research organization as a separate research organization reporting to me in the overall Gartner research structure. The bottom line is that our plan is to retain the entire analyst staff. The rationale for that is essentially the distinct client constituency that they serve and that we believe is important to continue to serve. We believe it is important to build upon the opportunity the two companies represent through the Gartner distribution channel.

## **Will the AMR offices remain in Boston? And will the AMR analysts work from home?**

**Peter Sondergaard:** It is our intent to retain the Boston AMR offices because that is where the majority of their employees are based. The Boston office will also serve as a platform for us to serve Gartner clients in the local area. Plus, we understand that there are different work styles. I think the research organization within Gartner is capable of sustaining any form of work style. We already have parts of the Gartner research organization that work in offices, and we have parts of the Gartner research organization where analysts work from home. So while we understand the way that AMR as a research function operates, we can incorporate that and do not have to change anything from that perspective.

## **Do we foresee any new reporting structures within research?**

**Peter Sondergaard:** As I mentioned, AMR is a separate research group within the Gartner research organization reporting to me. Throughout December and into the beginning of January, we will work out the details. But because most of the research produced by the AMR analyst organization goes to a unique constituency, we will keep this as a separate group managed in similar fashion together with the other research groups that we have under the Gartner research organization umbrella.

## **Do you see the current AMR research agenda or the Gartner research agenda changing as a result of the acquisition?**

**Peter Sondergaard:** Research agendas start with making sure we can fulfill the requirements and needs of the clients. Given the fact that we believe there's a substantial opportunity within the supply chain management space, the answer is obviously that we will retain the research agendas of the AMR analysts. It is not going to change in December, and we have asked the analysts to continue those agendas and planning of such into next year.

We believe there are aspects of the agenda that have substantial opportunity. For example, in the methodology space where we think there are some opportunities with what AMR does, such as the "supply chain 25" area, we may be able to broaden out and use these in other parts of Gartner deliverables.

But what is really important is that throughout the remainder of the year, there will be absolutely no changes. And given the fact that we expect to retain AMR clients, it is important that we can serve those clients and will therefore obviously continue these agendas into 2010. As we then move through the year, we'll make sure that we can continue to add value on top of the combined set of capabilities in the overall research organization.

## **The AMR supply chain methodologies are very strong and very well regarded. What are your thoughts about maintaining that strength?**

**Peter Sondergaard:** There are some opportunities here because our plan is, as I said, to retain everyone in the organization given the strength of the capability that exists. But I also believe that in addition, we have an opportunity to build out that capability to ensure that we can serve clients not just in the areas that AMR serves clients, but also to use the Gartner capability to serve clients elsewhere around the globe. I think you will see us build out capability in both Europe and Asia over 2010 and 2011 so that we can provide offerings globally.

**One of the tactical questions AR folks are wrestling with right now is about vendor briefings between AMR and Gartner analysts. What's your advice to our clients about how to conduct those vendor briefings through December and beyond?**

**Peter Sondergaard:** Until the completion of the deal, the two companies will operate as separate companies. For any briefings scheduled for December, it is with the respective organization that vendor briefings or any briefing or analyst activity would happen. As we begin to become one company, it is our intention to make sure we obviously integrate the capabilities such that it becomes one contact point.

For anyone planning into next year, until we can operate as one company, we really operate as two, but we'll do our utmost to serve anyone on this call that may need to be served. The bottom line is that we need to operate as two separate entities until the deal is complete.

**AMR, as you pointed out, has built very strong brand recognition in the area of supply chain management. Can you tell us your thoughts about the AMR brand and how you see our strategy for assessing and maintaining that going forward?**

**Peter Sondergaard:** Because the brand is so strong and AMR serves a unique constituency in terms of the supply chain value chain area, it is really our current intention to leverage that brand and therefore retain it.

**What are your thoughts on areas related to product portfolio? What are our plans after integration to merge the products and the offerings?**

**Michael Yoo:** Between now and the end of the year, there will be no changes whatsoever to any of our products. As I think about the product portfolio for our colleagues at AMR, let me take pieces of that in turn. The bulk of their businesses is in their advisory services. Let me start with them. Our intent after integration, as you might expect from what Peter told you about the analyst pool, is to maintain distinct supply chain offerings just as AMR has today. Let me be clear: We don't intend to merge AMR offerings into Gartner offerings—into a merged product. We think of AMR offerings as a discrete element that just adds another element to expand our portfolio. The bottom line is, I think, for most of our clients—in fact, for virtually all of our clients—you won't see any real difference in the products and services that existing clients of Gartner or AMR receive today.

As Peter mentioned, behind those AMR offerings we intend to keep all the AMR analysts, so we should see the same level of products and services that folks have seen to date prior to the integration. I will say as the head of the product team, I would imagine that we are likely to try to do some things technically. We'd like to deliver the products off the same platform. That will happen at some point during 2010. As those of you who deliver software know, it takes a bit of time to do that development. What I think our clients can expect in the first part of 2010 is to continue to receive the research product separately on [amrresearch.com](http://amrresearch.com) and [gartner.com](http://gartner.com) via separate platforms, and that sometime in 2010, we will deliver that on one platform rather than on two. But again, we will maintain discrete product offerings. That's about the research products, their advisory services.

AMR also has an event portfolio, which we're very excited about. They run an event for supply chain management professionals. There is a big event planned for spring of 2010. Our plan is for that event to go full steam ahead with no changes whatsoever. After integration, that's our plan as well. The thing that we're excited about is a similar scene to what we've been talking about on the research product, which is we see the event as a discrete addition to our event portfolio. And one of the reasons we're so excited about it is the ability to explore whether or not it makes sense to offer, for example, those events in other geographies around the world as we move together as a combined organization. And then lastly, we also plan to continue AMR consulting services as they have in the past.

**If I were an AMR client, what deliverables could I expect to receive during the remainder of my current contract?**

**Michael Yoo:** Gartner will honor all the deliverables as you might expect in any existing contract, whether it is a Gartner contract or an AMR contract. And then as you've heard here, our intent is not to make any changes to these deliverables. We intend to keep discrete supply chain management research offerings, discrete supply chain management event offerings, discrete consulting offerings. We anticipate that even after the integration you wouldn't see much change. You'd see the same great value, the same great services. We imagine that even after integration, most clients will feel very little change.

**Many of our AR Community clients have relationships both AMR and Gartner. What do you see happening with the AMR sales team?**

**Michael Yoo:** Our intent is to keep all of our AMR sales folks because we think they are very valuable to add to our existing capabilities. Our intent here is that while we've been talking about keeping discrete sales—discrete products teams and discrete research teams—our intent is actually to have an integrated sales approach. Again, between now and the end of December, clients will work with both their sales reps independently, as we're independent companies. That will continue after integration but we will, long term, merge our sales teams so our colleagues from AMR will be equipped to sell not only AMR supply chain offerings, but Gartner research offerings and vice versa; our Gartner sales reps will be empowered to sell AMR supply chain offerings in addition to the Gartner research offerings they sell today.

**For those clients who have contracts with both AMR and Gartner, should they continue to work with both their AMR and Gartner contracts?**

**Michael Yoo:** Clearly, every client will come up with their own answer to this. We believe the answer is yes, because in buying the services from Gartner and AMR, you're buying them because they each brought value to your business. We are going to continue, from a research and a product point of view, to deliver those in a discrete fashion. We think again that we won't see much change in what clients will receive in terms of value, and products and services.

Our intent here is that it feels for clients who purchase both Gartner and AMR services that it will be business as usual: the same products and services. The change actually will come for clients who buy only one or the other, because if you are a Gartner client who currently doesn't buy AMR research and has a need for supply chain management, you would now have the ability probably

to purchase it, whereas on the other side, for folks who purchased AMR and didn't buy Gartner, but find a need for that research, they now have the ability to do so. So again, for our clients who have both, we don't expect there to be much change. The change is actually for folks who buy just one or the other.

**For those clients who have both a Gartner account executive and an AMR account executive, which one do they work with and when?**

**Michael Yoo:** Between now and the end of the year, those clients should work with both reps, and both reps independently, since we continue to be independent companies. But after integration, what we will do is assess those situations on a case-by-case basis. There are going to be plenty of clients for whom it will make perfect sense to continue to have a relationship with both the Gartner sales rep and the AMR sales rep, often because they are selling two different parts of the organization. There are other cases where it will make more sense, and it will be governed by what makes sense for the client, that one of the sales reps be the primary point of contact—the person who services that account, whether it's from the Gartner side or the AMR side. In those cases, we don't lack for opportunities and clients to sell to, so we will be ensuring that all of our sales reps have territories that they can look to sell and look to grow.

**Will the AMR leadership team join Gartner?**

**Peter Sondergaard:** Yes. The AMR leadership team is joining Gartner. They will be offered new roles, and obviously until the end of December they will continue to operate as the AMR leadership team per what Michael has outlined. But absolutely our intent is to make sure that that happens. Also, in reaction to some of the tweets we are seeing right now, let me be a little more specific on the statement that we intend to make offers to all analysts in the organization.

On Tuesday, every analyst in the AMR research organization had an offer letter in their hand or electronically available, and so just to eliminate any perceived doubts—every analyst has an offer letter and, therefore, has been given the opportunity to continue the great work they've been doing to support the product set they're offering and supporting clients with, a platform upon which we intend to grow over the course of the next couple of years.

**How do you see the AMR integration being different, from an analyst retention standpoint, compared to the successes with META?**

**Peter Sondergaard:** Every acquisition or integration is different. In this case, what we're talking about is a unique capability to a unique client constituency with a brand that is incredibly powerful, that we believe that, when you add the Gartner distribution channel of 1,000 salespeople in 82 countries, becomes a great value proposition for an ongoing business. While we believe that there was enormous value from the META integration, it was a slightly different situation. It was a joining of two large organizations that address the same market overall. So it was a different situation. However, we believe that we learned a lot from the META integration and are applying all the best practices we had from that situation to this one, which is why we feel very confident about what we're doing at this stage.

**A related question organizationally is about the non-supply-chain analysts from AMR. Do you foresee them going into AMR's horizontal practices?**

**Peter Sondergaard:** As I said in the beginning, most of the analysts support the products and offerings that go to unique client constituencies. The reason I did not say 100% is that in some instances it may be that we, through the next couple of months, will work through where there may be an added value fit for those analysts. In some instances that could be the case, but overall I believe that the constituency they serve is a slightly different one. The research may be in a few instances complementary, and what we believe we can do there is obviously leverage the fact that within Gartner there are concepts such as research communities that ensure we manage positions correctly across the entire organization.

**Many clients highly value the AMR event coming up in the spring. Does Gartner plan to continue with that event as scheduled?**

**Michael Yoo:** Absolutely. As I said before, the spring 2010 event from AMR will proceed full steam ahead. No changes are planned. We're excited about having that as an added element to the Gartner event portfolio going forward. The reason we're thrilled about it is that we foresee, going forward, trying to extend that particular event. We clearly have to look at the business case there, but that's why we're so excited about it. Our intention is to think about how we can expand it.

**What are your thoughts on whether or not the client management organization within AMR will be retained as well?**

**Michael Yoo:** Again, the simple answer is yes. The reason for it is again, it's serving a different constituency, a different set of clientele. Our colleagues at AMR know how to service the clientele there, and that's a set of knowledge and expertise we absolutely need to have as we move together and move forward with discrete offerings in the space.

**Two questions related to the commercial relationship: The first one is, we've got a contract with AMR and are considering contracting with Gartner. What are the benefits of contracting with both groups? A related question—My AMR subscription is due for renewal in December. Why should I renew now rather than in January?**

**Michael Yoo:** Let me tackle the two independently. For the first question, our belief and our experience have been that we're serving two different constituencies, particularly as they consume this research, and as a result, the reason why a client would choose to purchase Gartner in addition to AMR is because it gives you insight into a different buying center, a different constituency. To my mind, that is the key issue here. As for the second question, why renew in December rather than January, our understanding is that if you're actually getting value out of the AMR services, there doesn't seem to be much reason to risk losing those services for a month or more. As we've said all along, we expect that actually the need for the delay you'd experience would be no different in January than it would be in December. If you find the services valuable, as we suspect you do, and as we know our colleagues at AMR believe you do, there's no reason to interrupt those services.

*You can listen to the entire webinar by going to the AR Community portal on [gartner.com](http://gartner.com). Under Announcements, select Listen to AR Community Announcement.*





Nancy Pearson  
Vice President,  
IBM Software Group

## Marketing Challenges and Analyst Relations: An Interview With Nancy Pearson, Vice President, IBM Software Group

We sat down with Nancy Pearson, vice president of BPM, SOA, WebSphere and industry marketing in IBM Software Group, to talk about the role of AR in that company and to get her insights into the challenges of the field. With more than two decades of experience in marketing, consulting, technical education and sales, Nancy has been a key player in many new growth-related efforts at IBM that required driving change and setting the agenda, including the launch of IBM's Linux marketing effort and, more recently, the IBM Smarter Planet "Smart Work" cross-IBM global marketing campaign. You can follow Nancy on Twitter: [@nancy\\_pearson](https://twitter.com/nancy_pearson).

Many thanks to Nancy for sharing her perspectives and experience with us.

### What role does analyst relations play in the marketing function at IBM?

Analyst activities are strategic to our marketing plan, specifically for high-level messaging and thought leadership for new announcement launches. Of course, we do ongoing briefings around specific technology focus areas such as BPM and SOA, but in addition, we engage analysts in an interactive dialog around the portfolio and the capabilities. This interchange with analysts is critical to the evolution of the portfolio because it gives us another view beyond our interaction with customers, to really focus on our activity and our priorities.

### What AR activities are most impactful for IBM marketing?

We've created analyst councils to leverage multiple analysts and get their input on a particular topic. We could have a council for Smart Work, cloud or BPM, and we leverage their input to help develop a messaging architecture. In a large company, you can get insular, so it's valuable to develop thought leadership and extensions about how we're articulating our value around particular capabilities. I find it very valuable to build that together with the analysts. This type of engagement with analysts is really at the highest level of strategic relationship and value for both parties.

For a council, we select about 10 analysts based on their subject-matter expertise and coverage. With this approach we don't have to go to many different analysts and brief them separately. And the benefit of collective brainstorming is critical, since analysts can raise real issues that need to be addressed, as well as confirm that we're on the right path. The council approach crosses multiple brands and categories. With the way councils are constructed, AR teams can also align with how we define initiatives, including themes, roles and channel strategies. AR managers can work effectively in a highly matrixed and initiative-driven environment.

Councils are very interactive and relationship-oriented, almost like a sounding board, where we can ask, 'We're thinking about doing this and we've included some of this content. What do you think? Does that make sense?' The analysts know our portfolio and our customer base, as well as our prospect base, so we get input on multiple levels.

For analysts, councils take them out of their silos, and they interact with others who cover different parts of the portfolio. They're helping us build our story, but they're hearing our story together. And so councils are efficient for all of us, and we get the benefit of different analyst perspectives focused on the issues.

### **How does your AR team build strategic analyst relationships?**

In the marketing plan, we work toward leveraging analysts to extend IBM's reach, to give us feedback on our portfolio from a client perspective. But we also want a strategic assessment on such questions as 'Am I establishing myself as a leader?' or 'Am I continuing the momentum as a leader in this space?' These questions are part of my marketing plan, which analysts help me to achieve.

We identify which analysts to engage for that purpose because they all have different focus areas. We create a plan that encompasses all the different aspects of marketing, or what we call the marketing mix, including analyst engagements, advertising, demand generation, events, social media and e-marketing. We have metrics for every one of the areas of the marketing mix, so from demand generation, for example, we measure leads.

On the analyst side, because it's so relationship-oriented, there are a number of ways to measure. No. 1 is the key analysts' coverage and alignment of our capabilities and offerings to the analysts' research agenda. We look at that alignment to determine what kinds of discussions we need to have and how we can interact with the analysts so that the relationship has value on both sides. It's important to us that the analysts get what they need from IBM, and we're getting input, value and reflection from them.

We are significant investors in our Software Group analyst relations program, which has been a long-standing strategic commitment because of what IBM sells and how we sell it. In the software business, there's no box to take a picture of, so you have to engage in relationships that really talk about value.

### **What makes an AR staffer effective in their role? Has anything changed over the years?**

An AR staffer needs to be deep enough technically to be able to really give us guidance on prioritizing with whom and how we engage with key analysts. What are the analysts' views? What are going to be some of the important questions to answer? Where are the hot buttons around the portfolio? So we look for a special person to really be our advocate in analyst relations. The AR professional at IBM is a senior leader. I think you need 10 years' experience in the business to do well in this role in a company the size of IBM. And the right mix of both strategic and technical aspects is not something you find in every individual.

What has changed is the challenge the AR staffer faces around the innovations. With the immediacy of social media and the capabilities of the Internet, more and more analysts are actually carving out their own online sphere of influence and differentiating themselves. AR staffers who meet the challenge help us build and manage those relationships.

## **How does AR prepare you for an analyst briefing?**

I've always been impressed with how seriously our analyst relations team takes their role. We always have extensive prep calls in every role that I've been in. The AR team and marketing address a variety of questions for the briefing, such as. 'What is the point of this consult or this inquiry or this briefing? What do we want to cover? Where are they coming from? What do we know about them? How can we best provide them with the type of information they are going to be looking for? What do we really need to get from this, and where do we want to take them?'

There's a lot of prep that goes into every interaction, because that relationship is important.

## **What role does social media play in the marketing-AR relationship?**

Social media in and of itself is a significant growth area in our marketing plan overall, but for the analyst component, it goes much further than that. Clearly now, analysts individually have a different level of influence and impact on our customers through formats like blogs and Twitter, so we've seen the relationship with analysts really expanding through social media. I find that the analysts who are involved in social media are those I want to talk to more than those who aren't, because I feel like they're more in touch with their communities.

We are able to extend our messaging, our communications and our dialog through these forums, whether they're blogs or Twitter contributions on BPM or SOA. I can participate during the course of my day, and I am able to see the hot topics the analysts are talking about. There's an immediacy and a communication stream to it unlike the traditional analyst relationship where you do a briefing or you engage in a piece of work, and then a month later, something gets published. This is now, in real time, and I'm seeing different analysts leverage this in different ways. We're in the business of wanting to listen to our customers and to analysts, as well as to other subject-matter experts.

So I see this on two different levels. I think there's the personal option of social media participation, which I apply, as does my team. But secondly, there is technology that's emerging to help you listen. And listen across many, many more forums than you could ever personally access, to understand threads and hot topics. I think that's what we're going to see more in the way of analytics and analysis for input.

## **How do your teams work with IBM's channel partners?**

We engage our partners in our marketing activities; and oftentimes, when we're talking to analysts, we're representing what we're doing with our channel partners. If we're talking to an analyst about an event, and channel partners are going to be with us in the booth, we'll have conversations about who's going to be there and why they were selected. And if we're talking about a specific area of the portfolio, we may extend that discussion more broadly into who the channel partners are and what we are doing with them. So it's more of an integrated approach to channel partners. The channel component is really an extension of whatever level discussion we're having with the analyst.

## What challenges remain for marketing executives and the AR function?

Increasingly, many companies are placing a lot of value on marketing. But it's still true in many environments that the big challenge for marketing leaders is identifying the value we provide and being able to quantify that. Every day we feel the pressure of delivering results. Marketing is not there just to create messages and ads.

You need to have very clear objectives about what you want to accomplish with press, with analysts, with demand generation through events or through social media. And then you need to be able to measure and tell the business units, 'This is why this works; this is why this is important; this is why you need to sustain and continue to have an investment here.' That's the biggest challenge most marketing professionals face. In today's environment, the economy puts more pressure on delivering those results with quantifiable metrics, which puts more pressure on marketing executives.

## Analyst Relations Forum Feedback

As part of our goal for continuous improvement, we asked for your feedback on the AR Forums in Orlando and Cannes. Because each year we try to shape the program to best suit your needs, we value your opinion and thank you for taking the time to complete the survey.

We offer the highlights here, combined for the two venues, and encourage you to contact us at [arcommunity@gartner.com](mailto:arcommunity@gartner.com) with additional comments.

Among the positive responses were:

- The ability to meet and network with AR professionals and Gartner associates
- The presence of Gartner executives Gene Hall and Peter Sondergaard and the chance to dialog with them
- Updates on research from other Gartner executives
- Good content overall, especially from Mark McDonald ("2010 Gartner CIO Agenda Survey") and Joshua Reynolds ("When Social Media and AR Collide")

Among the responses that specified improvements were:

- A longer program to accommodate the speakers
- A less crowded venue to allow better connections with peers
- Representation of the Gartner Consulting organization
- A better understanding of AR's role to help the analysts serve their clients better

Your suggestions on future guest speakers/topics for the next AR Forum included:

- Presentations from analysts whose research AR might typically not have access to in order to hear what our end users are being told and what Gartner is hearing from them
- A panel of analysts addressing how they work with AR, citing best practices
- Hearing from other AR professionals about how they run their programs
- A workshop venue to allow specific Gartner AR topics be presented and discussed, with an opportunity for input prior to finalizing a service or policy
- A presentation from Gartner on the relationship between industry analysts and financial analysts

- A presentation from Gartner about how salespeople are organized to cover the vendor community and what the expectations are for the analyst/vendor activity
- A presentation from an AR metrics tool vendor



Pamela Miranda  
Manager,  
Gartner Vendor Briefings

## **Gartner Vendor Briefing Process: An Interview With Pamela Miranda, Manager, Gartner Vendor Briefings**

This past quarter, we had a great opportunity at the Gartner Analyst Relations forums in Orlando and Cannes to collaborate with our Analyst Relations clients. We exchanged ideas and worked together to help streamline and improve interactions and services.

We invited the AR Community to participate in our annual survey and received over 170 responses. We appreciate the valuable feedback you provided, and we are in the process of sharing it with the applicable Gartner teams.

In your survey responses, some of you requested to learn more about our vendor briefings process. We thought it would be helpful for Pamela Miranda, manager, Gartner Vendor Briefings, to provide the AR Community with an update on our Vendor Briefings program. For almost a decade, Pamela has overseen the evolution and expansion of the program to align the needs of the growing vendor community with our Gartner analysts.

Here are some highlights from that interview.

### **Can you provide an overview of the Vendor Briefings group and the process?**

Today the global Vendor Briefings group consists of four collaborative teams based in North America, India, Australia and Japan. We process 12,000 briefings annually that the majority of our analysts support and leverage for their research agendas. We also provide additional services, including the management of non-disclosure agreements (NDAs) and the Gartner presence at vendor industry analyst events, which our analysts are invited to attend for knowledge and research purposes.

Vendors can initiate briefing requests with the submission of our [online Vendor Briefings request form](#) or our MS Word document form. Some vendors prefer the MS Word form, as they can complete the form once, save a copy and update the dynamic fields as needed. To ensure a more timely experience, we assign requests to the next available global Vendor Briefings specialist, which allows us to leverage on-and-off peak work times.

Based on the requirements outlined in your request form, the dedicated specialist will assess the most appropriate means for fast-tracking your briefing. For non-urgent and complex requests (when three or more primary analysts are requested), the dedicated specialist polls the analysts first prior to offering tentative slots for scheduling. By specifying the desired analysts up front, we are usually able to meet your requested time frame. For urgent phone briefings with up to three primary analysts requested, the process is expedited by the specialist offering tentative slots. Upon your selection, a calendar invite is sent to the primary requested analysts to simultaneously gauge level of interest and agreement to the proposed time. In both scenarios, briefings are finalized and confirmed upon analyst acceptance of the calendar invitation. Our feedback from

vendors indicates that adoption of these process best practices has helped to streamline and optimize the vendor briefing process.

## **What do AR professionals want most when scheduling briefings?**

The top request from AR professionals is to have their briefings scheduled in a timely, simple manner. In the last few years, we have implemented several strategies and process improvements to better meet this requirement. We streamlined our briefing request form, asking the bare essentials that analysts need to assess interest in a briefing. Most recently we globalized and expanded our teams in Mumbai, India, to improve our response rates, reduce cycle times and more proactively manage volume. We also incorporated an expedited process for fast-tracking urgent briefing requests.

Most briefings are scheduled within one to two weeks of submission. There are a few requests that require a much shorter time frame to set the schedule, and we do our best to accommodate those special requests by offering the opportunity to the analysts even if their calendars reflect unavailability. The analyst then determines priority scheduling. Scheduling cycle times may increase as the number of primary requested analysts increases. So for urgent briefings, it is best to limit your request to the top one to two primary analysts, as it increases the chance of scheduling availability.

## **What metrics do you use to measure scheduling cycle times, and how can AR professionals understand where their briefing requests are in the process?**

When a completed request form is submitted, within one to two business days, the AR requester receives an e-mail with point-of-contact details of the specialist handling your briefing and an assigned reference number. We do our best to maintain a two-business-days-or-less response rate throughout the processing period, and the AR contact can certainly e-mail or call the dedicated specialist for the most current status. If your request is urgent and you are unable to connect with your dedicated specialist, we strongly recommend calling our hotline (+1 203 316 6144) for immediate assistance.

## **How can AR professionals be more successful in the briefing process?**

There are two primary ways AR professionals can expedite the processing of their requests: (1) Try to limit the number of primary requested analysts to three or less per briefing wherever possible; and (2) try to limit the duration of briefing requests. Vendors who brief Gartner frequently should limit sessions to 30 minutes, or 60 minutes for less frequent sessions or those with high-impact content. This significantly increases our ability to schedule your briefing when and with whom you want.

In addition, if an AR contact has an e-mail agreement from an analyst to conduct a briefing at a specific time, it should be forwarded to the dedicated specialist so that scheduling can be secured.

Another tactic the AR Community can use to shorten cycle times is to respond ASAP when they receive tentative analyst time slots. Proposed tentative slots are not held on analyst calendars, so it is important to get to a defined time as soon as possible by ensuring that your executives are available for the proposed briefing date.

In addition to helping influence a more positive response from our analysts, identifying the best fit for a request is critical. We are always happy to assist you with this process; however, we also encourage you to familiarize yourself with the analyst community. The best way to do this if you are a Gartner client is to use the [Analyst Fast Finder tool](#) on gartner.com, read published Gartner research and then submit your briefing request. For those who have yet to become a Gartner client, you can access a list of [Gartner analysts](#) here.

The quality of information you provide on your request form is also crucial. AR clients can help expedite their requests by providing compelling, concise briefing details that explain the importance of your product launch, potential acquisition, key differentiators, etc. This content should briefly describe how the event will drive change for your company and the potential impacts it may have in the market.

I highly encourage first-time briefing participants to review the [Vendor Briefings site](#) on gartner.com to understand our process in more detail, as well as gain insight into key agenda items our analysts are looking for during briefings.

## **What are some of the advantages to an AR professional of using the Vendor Briefings process?**

We realize it may be more appealing to schedule briefings directly with our analysts. However, there are several advantages to using the formal Vendor Briefings process. For example, we increase awareness of your briefing by posting your request and any presentation materials you may provide to a central repository accessible by our global analyst community. We also record the briefings, which many of our analysts use as a valuable resource if they missed a scheduled briefing. Lastly, we ensure that briefings are properly and systematically posted to analyst calendars and Gartner databases. This provides a wealth of knowledge for our analysts, enabling them to monitor the volume and briefing topics you submit, along with the analysts you briefed.

## **How can Gartner help the AR Community understand Gartner analyst expectations about Vendor Briefings?**

Our analyst community uses briefings purely as a research tool and vehicle for receiving key vendor information that may impact the market and industry and/or help them address end-user inquiries. Analysts prefer that vendors provide slide presentation files for all scheduled briefings at least two to three business days prior to the briefing date. This also applies to Web demos, as our analysts often take briefing notes directly in the slide presentation, which can then be uploaded to the central Gartner repository for knowledge sharing. Our analysts are also interested in receiving video clips (if available), where the AR professional would highlight the vendor's key differentiators in the market and industry.

Requests for analyst feedback—regardless of client status—and tactics for maximizing and enhancing your relationship with our analysts should be managed through your Gartner account executive or the Client Service Group. If you're looking to develop a relationship with analysts, the best way to do it is to pose questions through our Client Service Group about published Gartner research, analyst coverage areas and their research agendas.

To gain further insight into how our analysts use Vendor Briefings, please read [Gartner Analyst Perspectives on Vendor Briefings](#), written by Gartner analyst Michael Maoz. Another useful resource on how to effectively interact with Gartner is titled [Getting Gartnered: How Technology Providers Can Work With Gartner](#), written by Gartner analysts Matthew Goldman and Gareth Herschel.

### **How does Gartner maximize the information shared during Vendor Briefings?**

If a briefing call is scheduled through the Vendor Briefings team, it is recorded. This provides analysts with an audio legacy they can listen to up to 28 days after the call. This is an especially useful tool for analysts who were unavailable for a briefing.

In addition, Vendor Briefing request forms and vendor presentations are tagged and archived to the Gartner content management tool, which provides our analysts with a library of resources they can refer to after a briefing. The tagging of content features provides sophisticated search capabilities for analysts.

To further disseminate information across the Research organization and increase awareness of existing briefings, analysts can also set up a profile to obtain automatic alerts when a particular vendor has briefed Gartner or a specific topic has been covered.

### **Vendor Briefing volumes appear to be growing. What other enhancements are you driving to improve service?**

In 2010, we will continue to monitor volume trends and focus on reducing scheduling cycle time through process modifications and team professional development. In addition, our goal is to broaden the broadcast of briefing requests to all relevant analysts who may have interest, not just the analysts a vendor has specifically requested. We will use technology to better deliver these requests to the analyst community. By making the message heard loud and clear, we are doing a service to both the Gartner analyst community as well as the vendor AR community. Stay tuned for some exciting new features in 2010!

To provide specific recommendations on Vendor Briefings or to submit general questions and comments, visit the [Analyst Relations Community](#) page on gartner.com or e-mail us directly at [arcommunity@gartner.com](mailto:arcommunity@gartner.com).

## **New to the Research Team**

### **Victoria Barber**

Principal Research Analyst  
IT Sourcing, Procurement & Asset Management

Victoria is responsible for software asset management and software audits. Prior to joining Gartner, she set up and managed the software asset management function at Centrica. She specializes in software asset management process and policy, and vendor software audits. Victoria has a master's degree from the University of Cambridge (U.K.).



**Bard C. Papegaaij**  
Research Director  
Enterprise Architecture

Bard specializes in helping companies set up their enterprise architecture function, and making it possible for companies to have their business and technology strategies work together. He has over 25 years of experience in the IT industry in a variety of roles and has worked for many different organizations, from local SMEs to multinational corporations and government. Bard has a master's degree in English and literature, and computational linguistics, from the University of Utrecht (Netherlands).



James Stanton  
VP, Gartner High-Tech  
& Telecom Programs

## James's Corner

Yes, it's that time of year again: 2009 is drawing to a close! As you begin to plan for the year ahead, be sure to review some of the key research your clients are using to make their planning decisions. One set of research that should be front and center is the Gartner for IT Leaders Key Initiatives content. Key Initiatives represent the most common critical programs our end-user clients are working on today. Aligned to initiative or role, Gartner for IT Leaders Key Initiatives research provides overviews and insight that help validate questions and provide actionable solutions for issues important to our clients. Along with their aligned toolkits, Key Initiatives research provides you with a quick read on what your clients come to Gartner for every day. If you're a Gartner client, you can download Key Initiatives directly through your Gartner for Analyst Relations portal. If you're not a client, you can register now to receive a complimentary Key Initiatives report "First 100 Days: Head of IT Vendor Management."

## New! Gartner Market Statistics Online experience

For the first time, Gartner has an online experience that gives our clients access to virtually all of our market forecasts in one central location, using one common interface, and accessible via just three clicks. Version 1.0 of Gartner Market Statistics Online contains five-year forecasts for 200+ product and service categories by 50+ countries and forecasts for 40+ vertical industries. Future versions will provide clients with access to market share data and other key metrics relevant to individual clients, users and vendors alike.

## Learn more

If you are a Gartner client, please reach out to your account executive to find out more about Key Initiatives and the new Gartner Market Statistics Online experience. If you are not a Gartner client, please sign up for our complimentary marketing program.

[Register now](#) to receive a complimentary report, "First 100 Days: Head of IT Vendor Management."

(Note: Be sure to select 'Analyst Relations' as your role to receive this research)