

Getting 'Gartnered': How Vendors Can Work With Gartner

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Understanding Analysts

Our job is not to be mean.

Our job is not to be nice.

Our job is to help:

- Our clients solve their problems
- You stop wasting the time of your:
 - Sales people speaking to the wrong prospects
 - Developers working on low-priority capabilities

What Do You Need to Do?

1. Set realistic expectations.
2. Segment your analysts.
3. Engage with the analysts.



1. Have Realistic Expectations

Even if Gartner loves your stuff, you still need to be out there selling it.

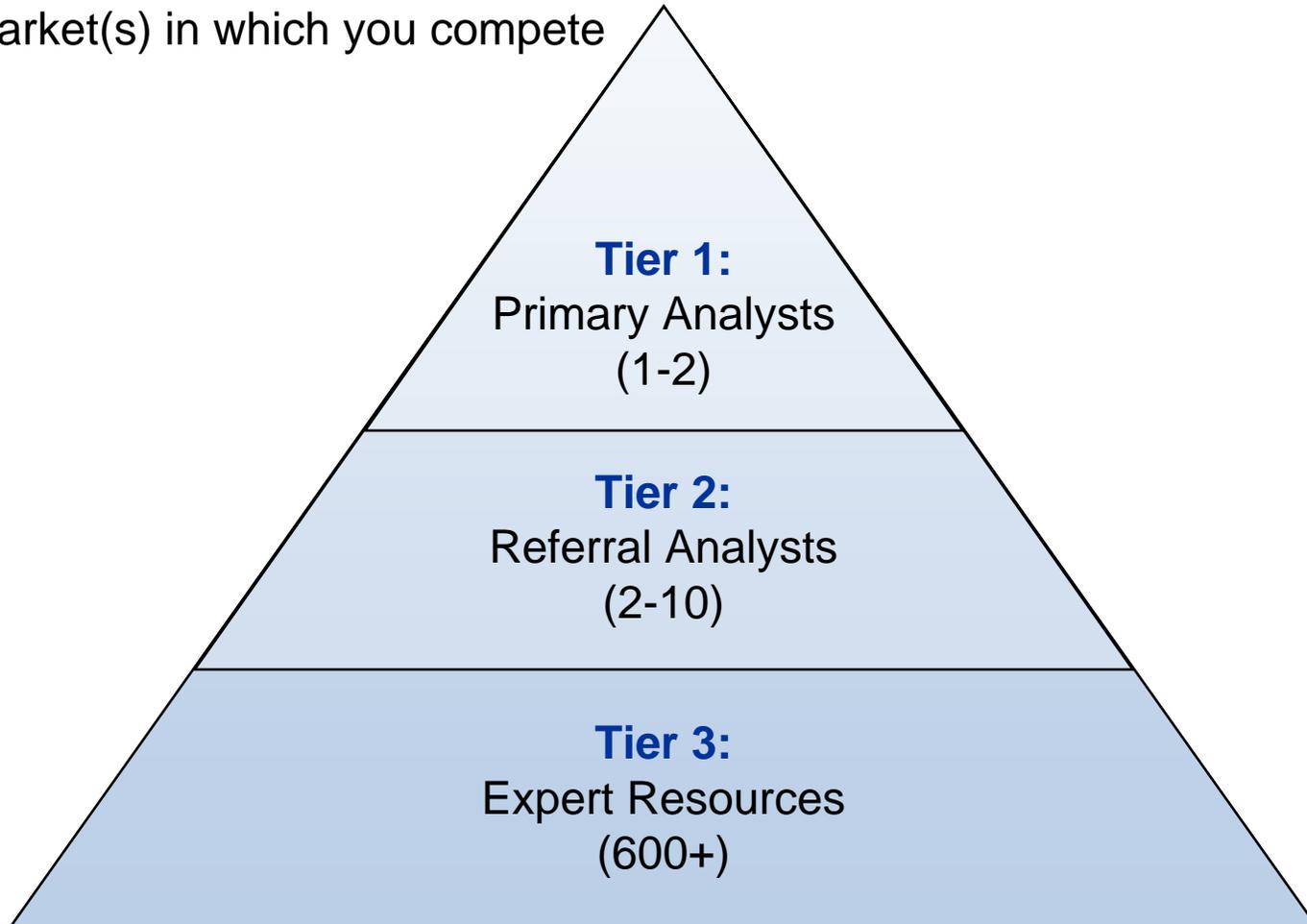
- We will tell (we may even write) why clients should look at you. But if your sales force is disorganized and your marketing is invisible, then it will not sell.

If Gartner doesn't love your stuff then either:

- We don't get it. Help us. Give us briefings, demos and references.
- We get it and think you don't. We will help you find the right message and the right audience for your solution because we think your current pitch is off target.

2. Segment Your* Analysts

* The market(s) in which you compete



2a. Your Primary Analyst

- **Who?** The analyst who knows you best. When other analysts want to know about you, they call this one. When clients call in to discuss you, they speak with this analyst.
- **Objective?** Eliminate surprises.
 - You know what they think
 - They know what you are doing
- **Engagement:**
 - Regular inquiry
 - Strategy consulting
 - Quarterly briefing

2b. Your Referral Analysts

- **Who?** The analyst who has conversations with clients where you may/should be mentioned
 - May cover other ways of solving the same issue
 - May cover your partners
- **Objective?** Awareness
 - They know who you are and when to mention you
 - You know which conversations the analyst has that include you
- **Engagement:**
 - Annual update briefings
 - Occasional inquiry

2c. Your Expert Resources

- **Who?** Any analyst who can help solve your problem.
 - Will this database platform deliver the performance our application requires?
 - Will my key OEM partner be acquired?
 - What are the biggest issues people in this market are dealing with?
- **Objective?** Helping you make a decision
- **Engagement:**
 - Inquiry as often as required

3. Engage Analysts Appropriately: Three Ways to Interact With Gartner

Inform

You  Analyst

- Accurate and fact-based coverage created by well-timed and delivered vendor briefings and other analysts interactions
- Generally driven by Analyst Relations
- Outbound or "**push**" interaction in an effort to generate positive analyst views

— Anyone —

Insight

Analyst  You

- Valuable market insight on trends, verticals, channels, competitors, and end-user wants and needs.
- Primarily driven by market intelligence group
- An inbound or "**pull**" interaction to gather information to help service provider make better decisions

— Clients —

Inquire

Analyst  You

- Research-based services to help service provider be more successful
- Driven by vendor executives
- A **collaborative** and consultative relationship designed to meet the needs of service provider.

— Increasing value to your business — 

3a. Vendor Briefings

- The objective of a vendor briefing is to provide answers to these questions for analysts:
 - *What client need do you best fit?*
 - *When can you best add value to a client?*
 - *Who are you targeting? Who are you not targeting?*
 - *What makes you different?*
- VBs contribute to an analyst's overall impression of your organization — simple steps can help you improve the desired impact .

Vendor Briefing Best Practices

- Be consistent and top of mind
 - Present more than annual updates on your business
 - Include VBs as component of your release schedule
- Focus on a key objective
 - Narrowcast your message; Narrow the audience
 - Speeds scheduling and improves efficacy of the briefing
 - Event briefings differ from product or service briefings
- Be concise
 - Focus; Less is more
 - Max, 20 SPH
 - Build in time for questions

Example of Effective VBs: Focus on 4 Key Points

Inform

You  Analyst

1. Summary

- Company overview as context for the briefing
- History, vision, recent financial performance

2. Market Positioning

- Market trends and drivers and how they affect your clients and your organization
- Target market, your differentiators and ability to deliver

3. Capabilities

- Products/services, tool, methods and delivery model
- Value proposition, success stories

4. Strategic Intent

- What are your plans for growth and differentiation in the market?
- How will you plan to monetize these opportunities?

3b. Read Gartner Research

- The primary objective of Gartner's research is to deliver the technology-related insight necessary for our clients to make the right decisions, every day.
- Gartner publishes 56,000 pages of content per year across 6,300 documents
 - *What should I read?*
 - *How can I find it?*
 - *What should I do?*
- Clients look for ways to process, digest and act quickly on the information relevant to their business

Gartner Research Covers the Areas You Care About Most

Insight

Analyst  You

Qualitative:

To provide research and insight on users and technologies, and how you fit in the market

Customers <ul style="list-style-type: none">• Customer Insights• User Surveys• Vertical Research	Markets <ul style="list-style-type: none">• Data Modeling & Storage output• Channels Analysis• Market Trends
Technology <ul style="list-style-type: none">• Hype Cycles• Emerging Technologies	Competitors <ul style="list-style-type: none">• Market Share• MQs• SWOTs

Quantitative:

To provide forecasts and shares on providers & technologies, and how you fit in the market

Insight Best Practices

- Read *Key Issues* notes (and attend Scenario Presentations) to understand our approach to covering these topics
- Set alerts on your key analysts or key topics
- Understand the assumptions and put it in your context
 - Discuss the content internally (use the summary, findings, and recommendations to engage)
- Validation ... or Something New?

3c. Strategy Consulting and Inquiry

Inquire

Analyst



You

- Advice is the primary channel for two-way interaction.
- "Advice" enables clients to engage analysts on key market issues, trends or observations, AND customize the content for your organization.
- When used effectively, inquiry is an excellent way to obtain deeper insight and learn more about an analyst's views.

Best Practices for Engaging Advice

Inquire

Analyst



You

- Pick a primary objective or question
 - Use scenarios to frame context for question and want some feedback?
 - Ask questions that help you make decisions about your product plan — *in early, in often*
- Proactive discussions
 - More value to you, to discuss plans and strategies with analysts prior to launch
 - Provides sounding board advice, and informs analysts
- "We shouldn't be surprising each other"
 - As your advisor, we want to help you make better decisions

Recommendations for Successful Analyst Relations

- ✓ Facilitate two-way dialog between the analyst and the rest of the organization. To the analyst, you are the mouth and the ears of your company.
- ✓ Work with your primary analyst(s) to understand:
 - Upcoming research
 - Which referral analysts need to be briefed
 - Why the analyst thinks what they think

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