



# Gartner AR Community Quarterly Teleconference

Jeff Golterman, GVP High Tech & Telecoms Programs  
Analyst Relations Community Leader

January 27 and 28, 2009  
Version 3.0



**Our purpose: To foster information sharing and best practices with Analyst Relations professionals so clients and non-clients can interact more efficiently and effectively with Gartner.**

# Today's Agenda

- Welcome
  - Jeff Golterman, group vice president and Gartner analyst relations community leader
- Research Quality Focus Group – Findings with Analyst Relations
  - Jenni Lehman, group vice president, Gartner research operations
- Gartner Research Agendas for 2009
  - Themes and Topical Research
    - Simon Hayward, HTTP Role Services Director and Gartner Fellow
  - Marketing Essentials
    - Laura McLellan, research vice president, IT marketing & channels strategies
  - Verticals
    - Venecia Liu, research director, industry market strategies
- Q& A
- Wrap-Up and Heads-Up for Gartner AR Community Calendar
  - Jeff Golterman

■ ■ ■ ■ **Gartner Research Quality and  
Continuous Improvement**  
**- 4Q 2008 Focus Group Findings**

**Jenni Lehman**  
**Group Vice President**  
**Gartner Research Operations**

# Ongoing Market Research

- Gartner engages in objective ongoing, annual market research to feed improvements to research, methodologies, processes, the overall client experience, and to ensure objectivity.
- Each year for the past four years, Research has conducted focus groups at our Symposium Events in Orlando and Cannes.
- Groups have included separate sessions with our End-User clients and our Vendor clients. This year we added an Analyst Relations group.
- Feedback is used provide input to new methodologies and Research programs, measure year over year satisfaction and is considered in annual planning.

# 2008 Focus Group Objectives

- The primary purpose of this research was to solicit subscriber input on a range of topic areas related to improvements in Research content and deliverables.
- Specifically, this research was designed to collect feedback in the following areas:
  - Requirements for communicating/previewing Research Agendas
  - Reactions to a methodology focused on business impact
  - Document labeling and tagging suggestions
  - Improvements in use of graphics and visuals

# ■ ■ ■ ■ Feedback Summary

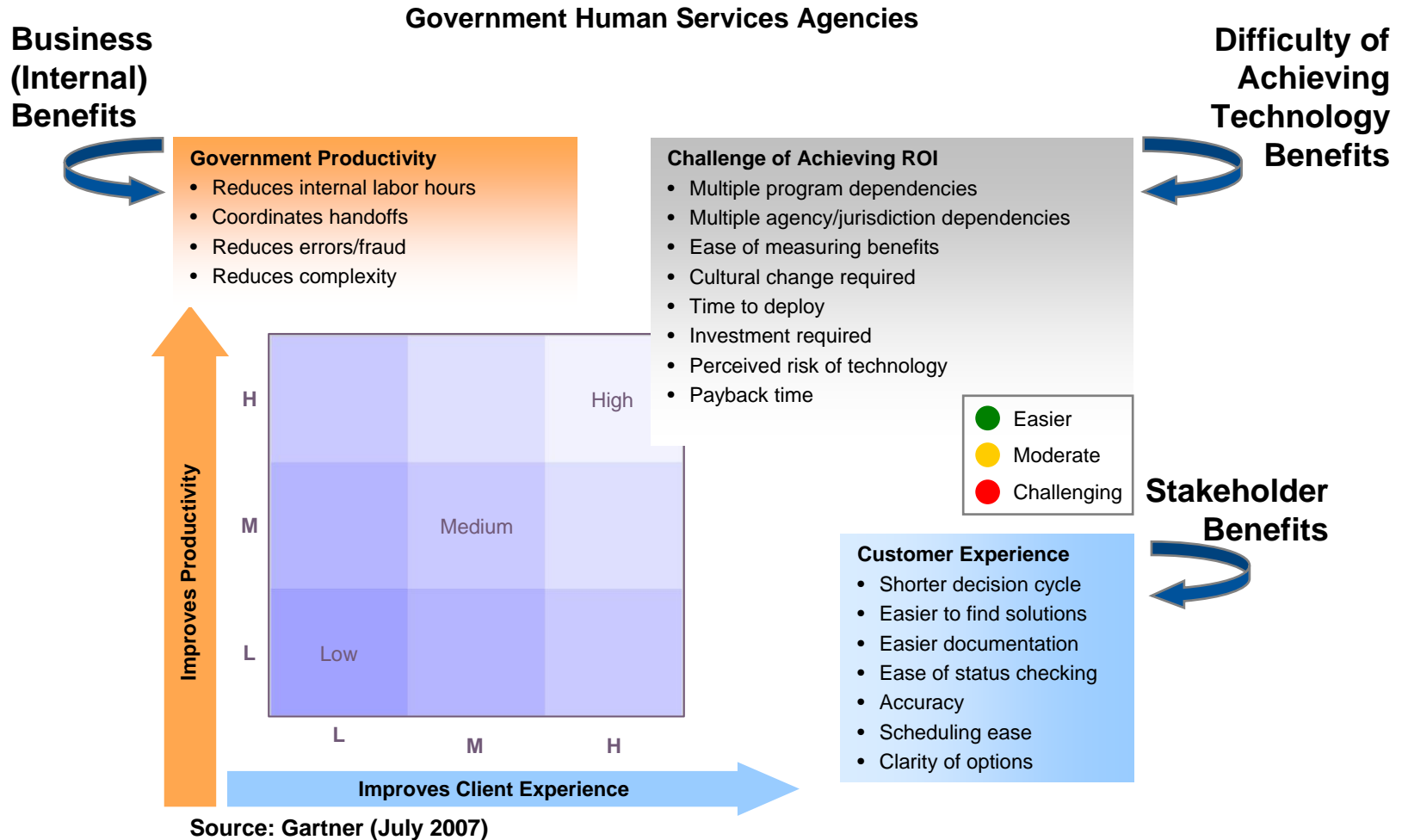
# Research Agendas and Document Tagging

- Awareness of published research agendas was limited
  - Current practices in this regard were generally seen as adequate by end user clients
  - Vendors and AR professionals expressed very specific requirements about Gartner's publishing schedule and review cycles where they pertained to the client's specific company or technology sector
- Strong agreement that improvements in the classification and labeling of research documents would enhance the identification and dissemination of relevant content.
- Much discussion and debate ensued about the most appropriate taxonomy for Gartner Research, with no real consensus.
  - Among suggestions for useful classification were groupings by IT Role, business vs. technical focus, or strategy-level vs. implementation-level detail.
  - A sizeable sub-segment of respondents suggested the inclusion of greater Web 2.0-enabled collaborative taxonomies such as folksonomies, user and/or Gartner generated tags, user commentary and/or ratings, etc.

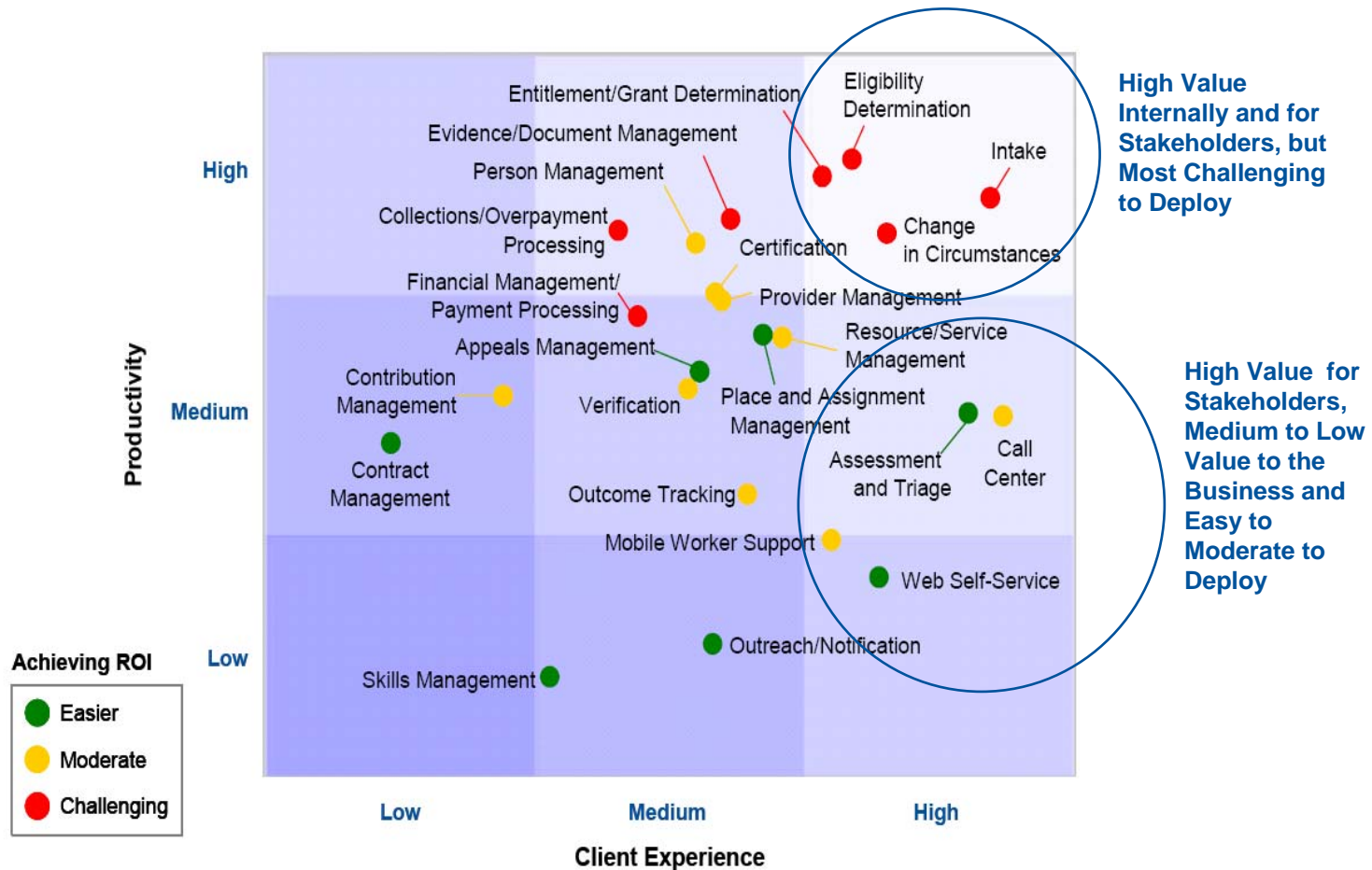
# Methodology Feedback: Strategic Technology Map

- Responses to the conceptual depiction of the proposed Strategic Technology Map methodology were uniformly positive.
- The benefits of the methodology were readily apparent to both Users and Vendors.
  - Among Users, expected usage included management presentations, strategic planning, budget planning and prioritization, and benchmarking.
  - Among Vendors, the methodology was viewed as a valuable tool for market space definition, positioning development, identification of partnership opportunities, competitive benchmarking and capabilities gap analyses.
  - AR professionals were generally accepting of the concept, provided their firms were allowed to review and comment on the analyses prior to publication.
- A high degree of verticalization of the analyses was deemed critical for relevance and planning value, and the accommodation of client customization a mandatory component of the methodology.
- <http://www.gartner.com/DisplayDocument?id=510289>

# Strategic Technology Map Concepts



# Strategic Technology Map Examples



Source: Gartner (July 2007)

# Visuals and Presentations

- In general, Gartner's current use of visuals was deemed too cluttered, text heavy and overly detailed
- Gartner's accommodation of client re-use of content in presentations was criticized as overly restrictive and technologically limited
  - Re-purposing of visuals and text is commonplace
  - most users would like to be able to adjust color schemes, simplify content and eliminate extraneous content that doesn't advance the client "story"
- On a broader level, respondents suggested that Gartner could improve upon its use of visual displays of its content
  - Incorporation of graphics to supplement, rather than replace, text
  - More effective use of PowerPoint
  - Virtually no desire for animation or dynamic content with the exception of "builds" that simplify complex graphics into components
  - Only limited need for video or audio clips

# Overall Feedback and Priorities

- Client receptivity to the range of improvement areas explored in this research was noticeably positive, and indicative of the relevance of Gartner's focus on this specific set of improvements.
- Users and Vendors were in general alignment on priorities, placing the most emphasis on:
  - Enhancements to document classifications and labeling
  - Improvements in the use of visual/graphical information displays
  - Further development of the Strategic Technology Map concept

# ■ ■ ■ ■ Gartner 2009 Research Agenda for Technology & Service Providers

- Overview
- Themed Research

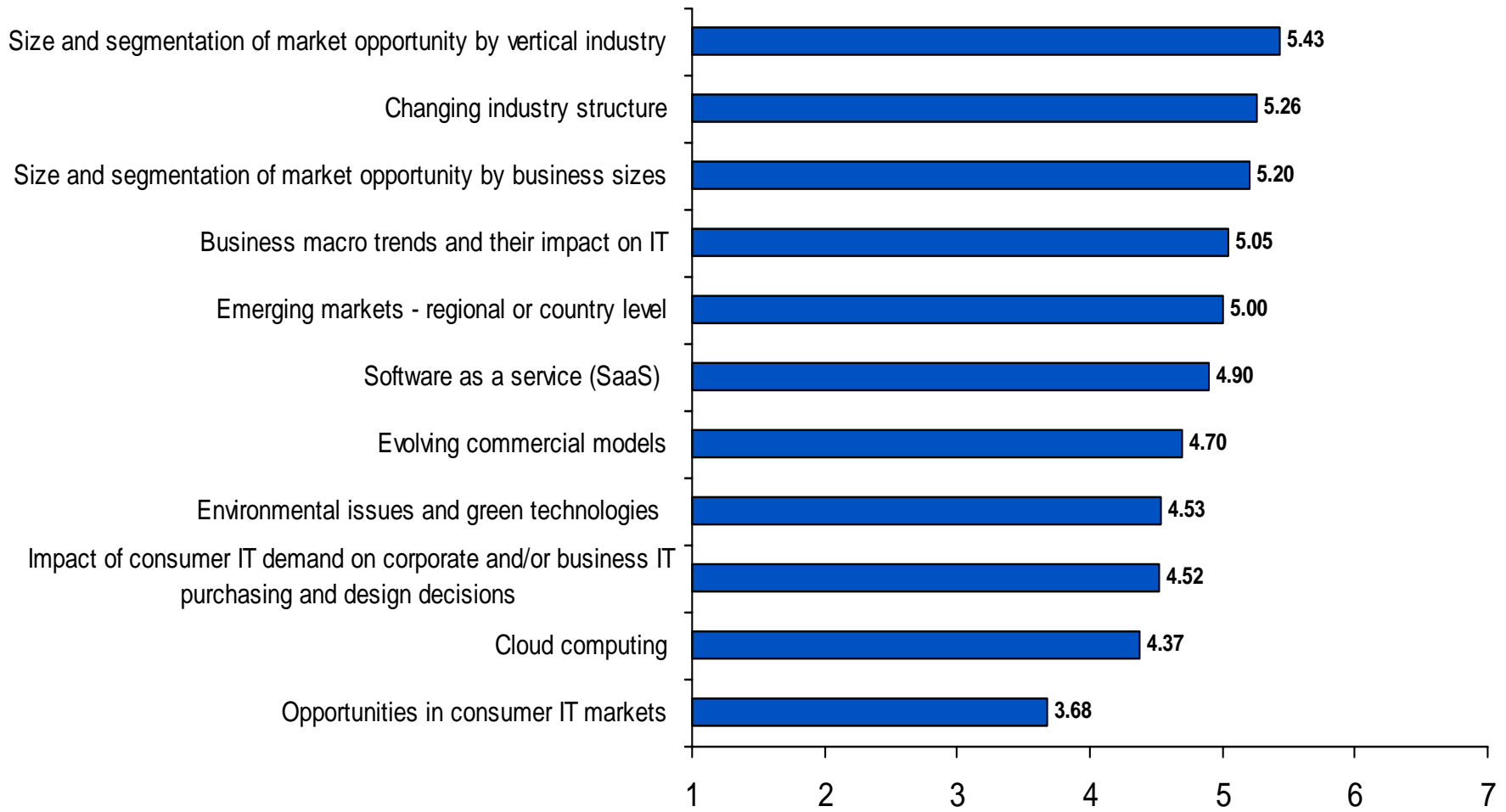
**Simon Hayward**  
Role Service Director  
Technology and Service Provider Group  
Gartner Research

# Gartner for Business Leaders Framework for Delivering Research



We deliver data, insight and analysis organized around these four categories to help clients grow their business.

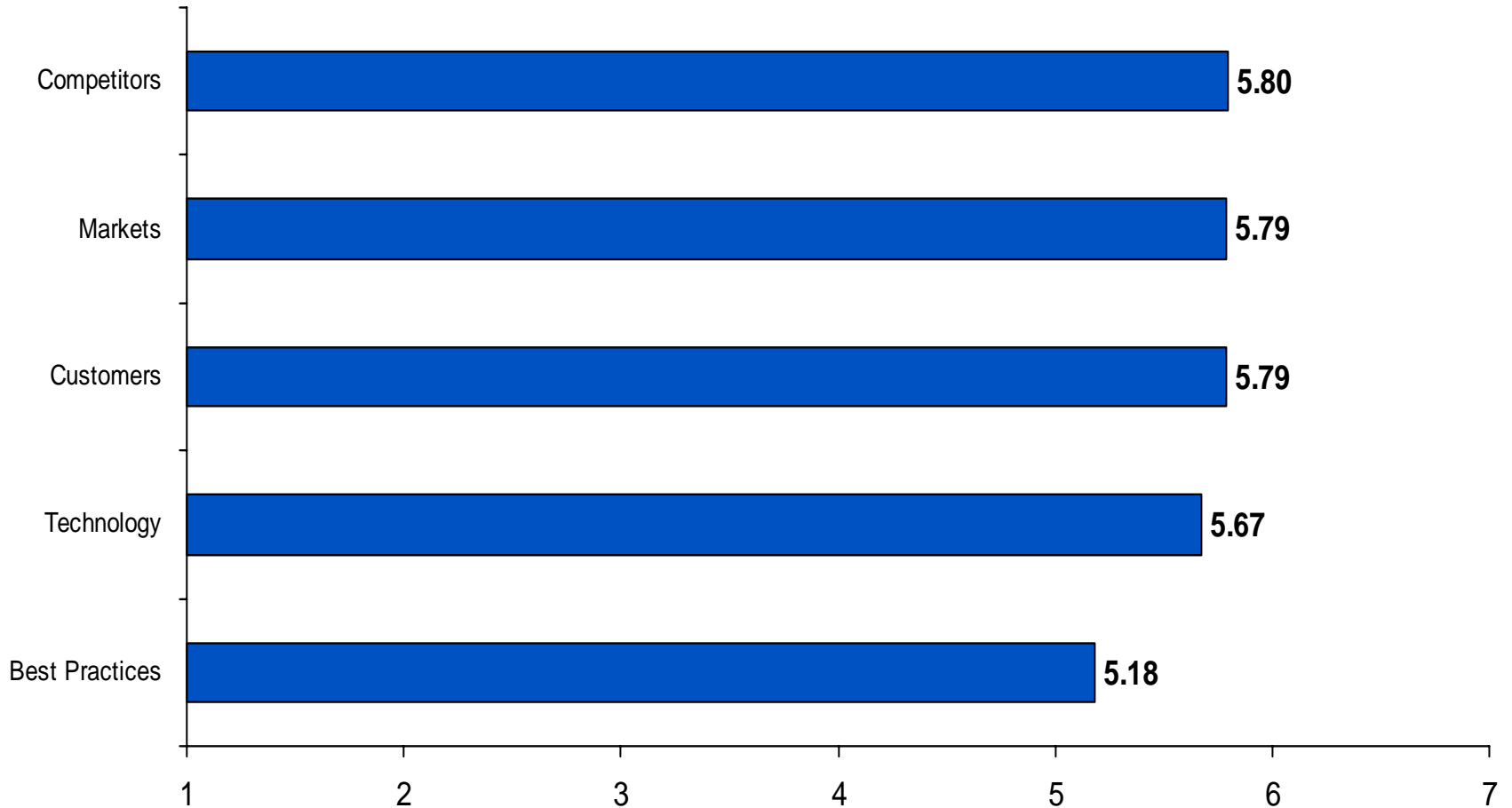
# Macro business / Technology trends: how important is having accurate research and advice



7-point scale: 1 = not at all important, 7 = critical

Survey IT suppliers, Q4 08  
n=547

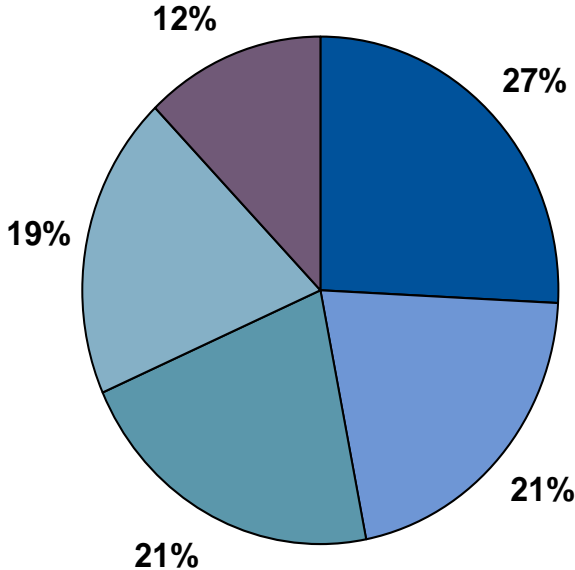
# Topic areas: how important



7-point scale: 1 = not at all important, 7 = critical

Survey IT suppliers, Q4 08  
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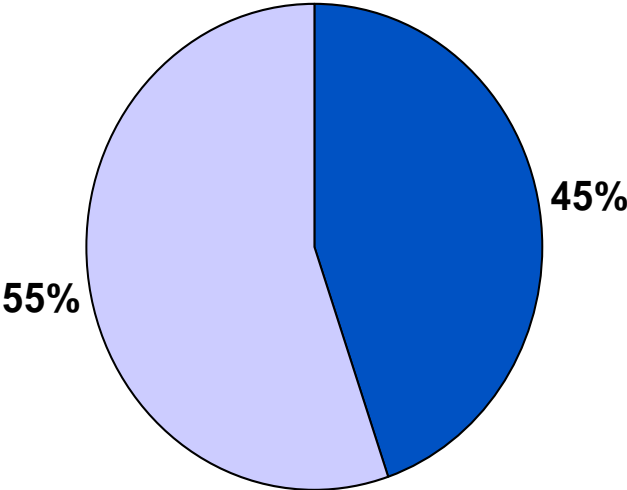
# Hypothetical budget allocation: Topic areas



■ Markets ■ Competitors ■ Customers ■ Technology ■ Best Practices

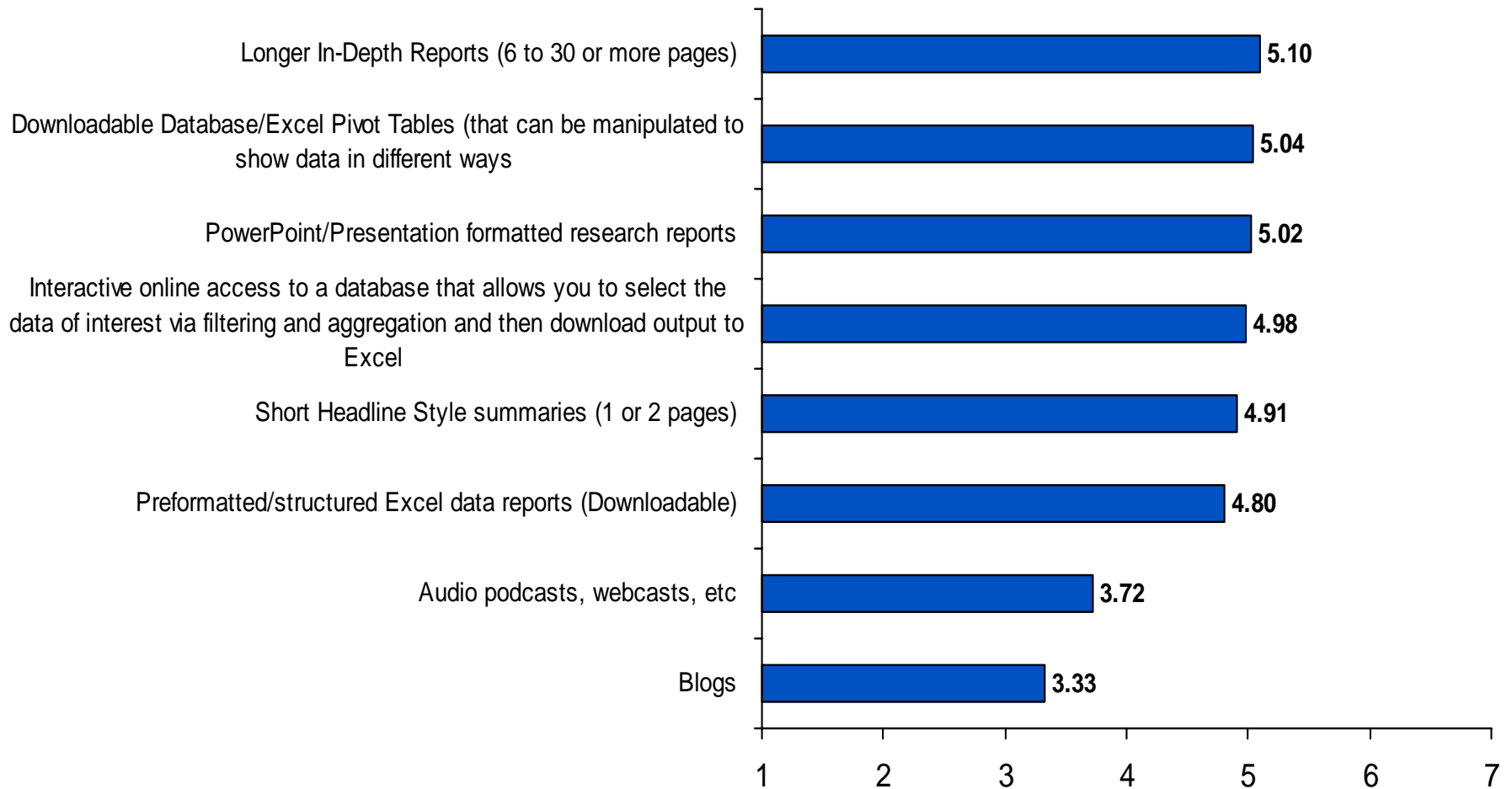
Survey IT suppliers, Q4 08  
n=547

# Hypothetical budget allocation: Emerging Markets



Survey IT suppliers, Q4 08  
n=547

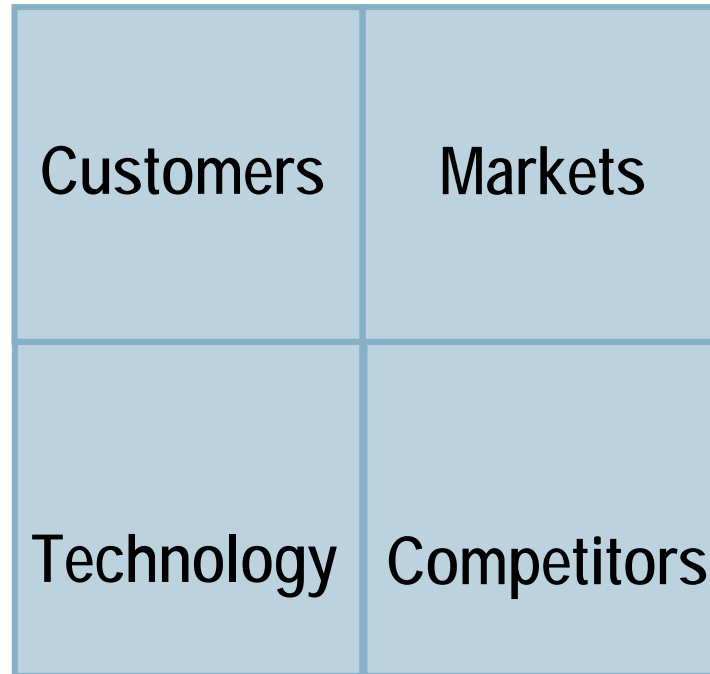
# Preference for delivery format of research



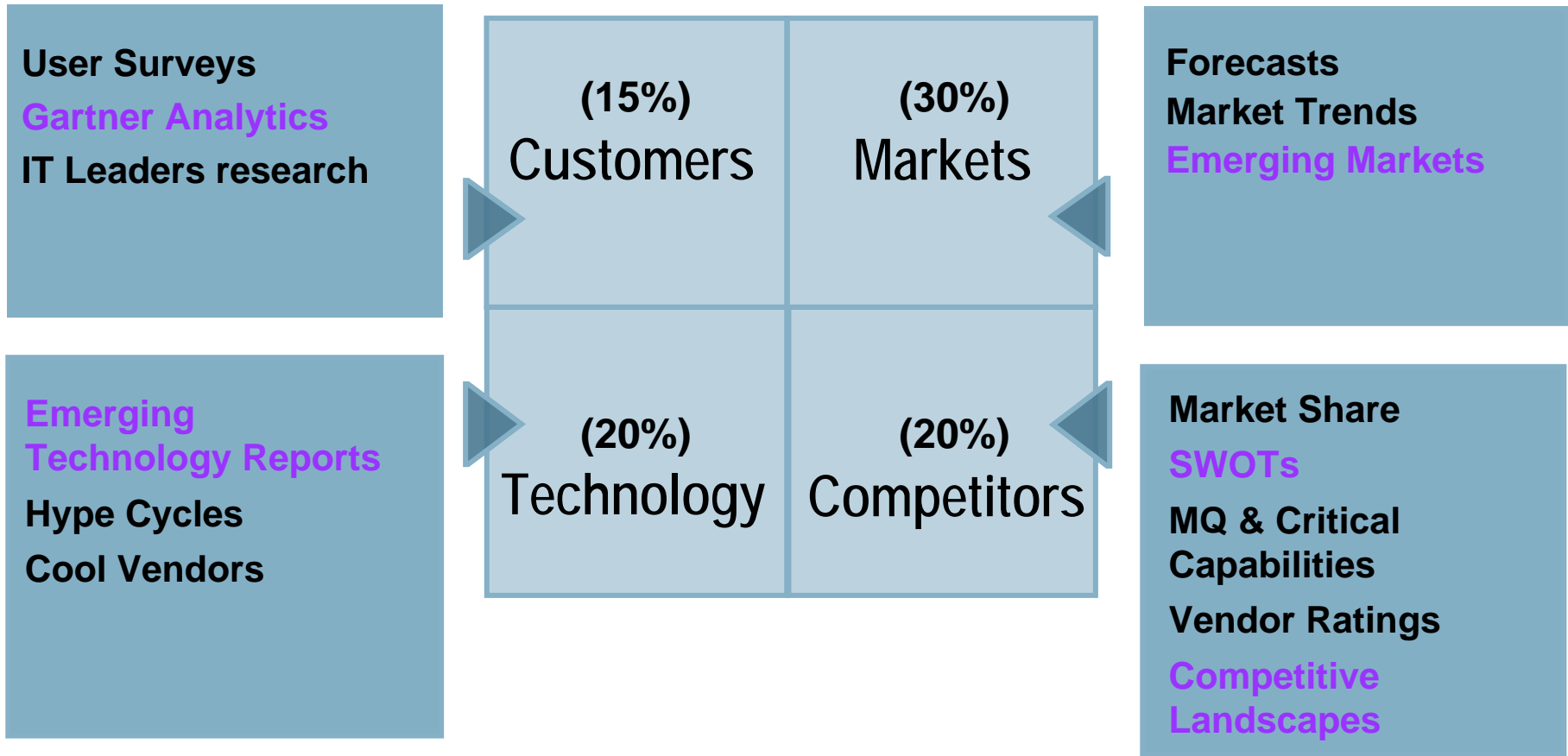
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# T&SP Research Agenda Framework 2009

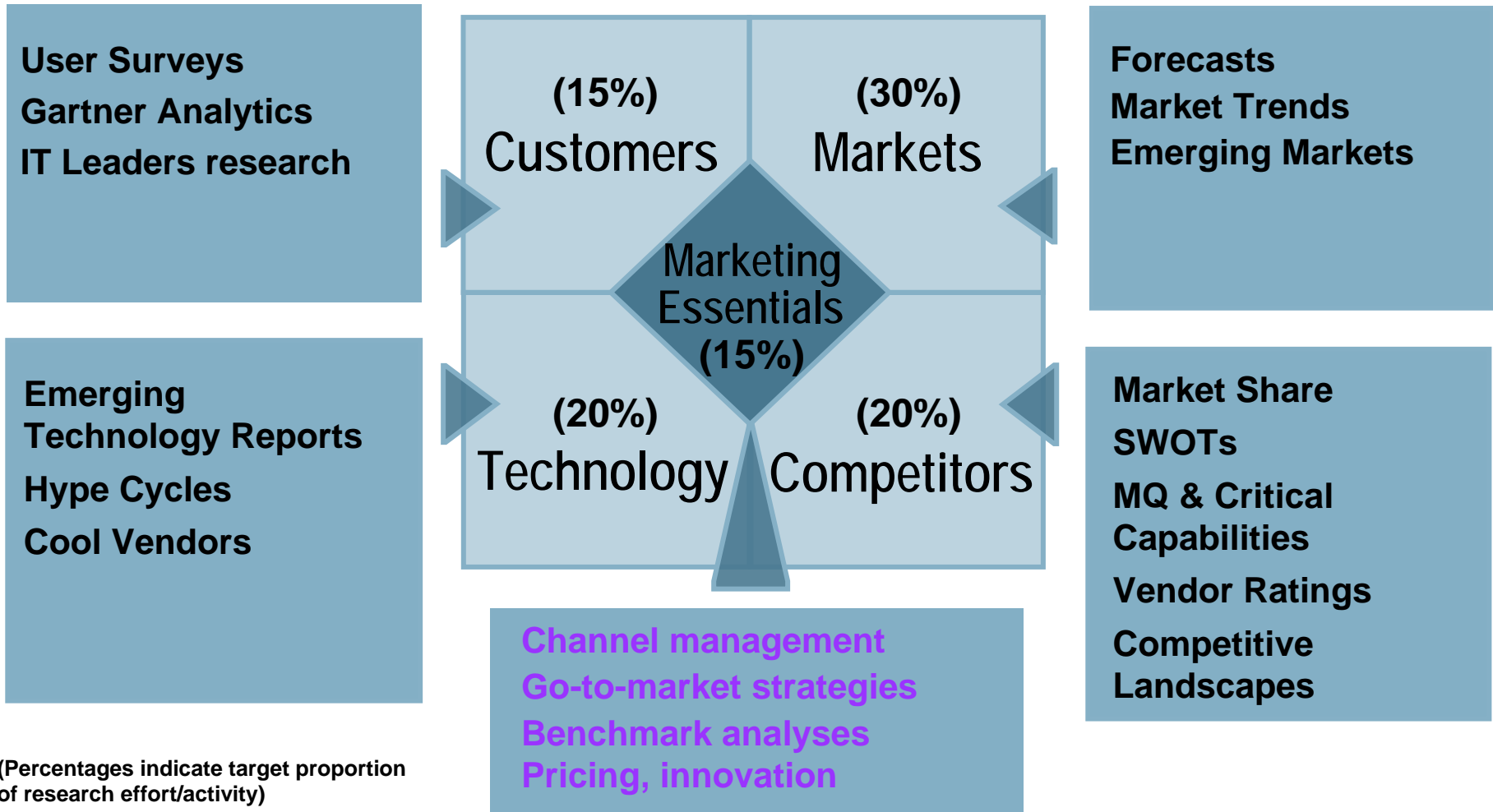


# T&SP Research Agenda Framework 2009



(Percentages indicate target proportion of research effort/activity)

# T&SP Research Agenda Framework 2009



# New Cross-TSP Agendas for 2009

- Benchmarking and Best Practices for HTTP Marketing
- Global IT Forecasts and market analysis
- Emerging Markets
- Cloud Computing
- Green IT

■ ■ ■ ■ **Gartner 2009 Research  
Agenda for Technology &  
Service Providers  
- Marketing Essentials**

**Laura McLellan**  
**Research Vice President**  
**Technology and Service Provider Group**  
**IT Markets & Channels**

# What is Marketing Essentials?

- New category of content & way of working for Technology & Service Provider group
- Cross-teams agenda (~ 60 docs in 2009) with mix of tops down/suggested & bottoms up/proposed topics
- Written specifically for a “role” (published to Gartner for Business Leaders Program Management & Marketing)
- Highly actionable “how to” docs = majority
- Informed opinions backed up with fact-based support
- Based on activities & actions, not functions
- Employs a broad view of marketing



**“Marketing is responsible to define, create, grow, develop, maintain, defend and own markets.”**

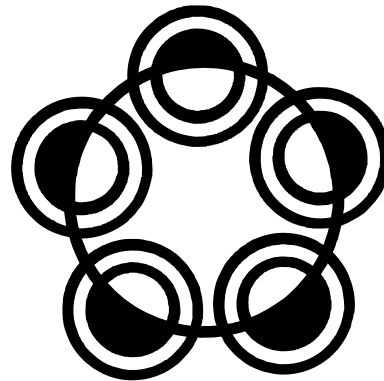
# Activity Cycle for Marketing (to be introduced Feb. 2009)

## Examine:

- Assess the market
- Assess the competition
- Understand the customer

## Plan:

- Develop strategic plan
- Develop tactical plans:
  - Offerings
  - Product Marketing
  - Positioning/brand
  - IT systems



## Evaluate:

- Monitor feedback/results
- Measure success
- Take remedial actions

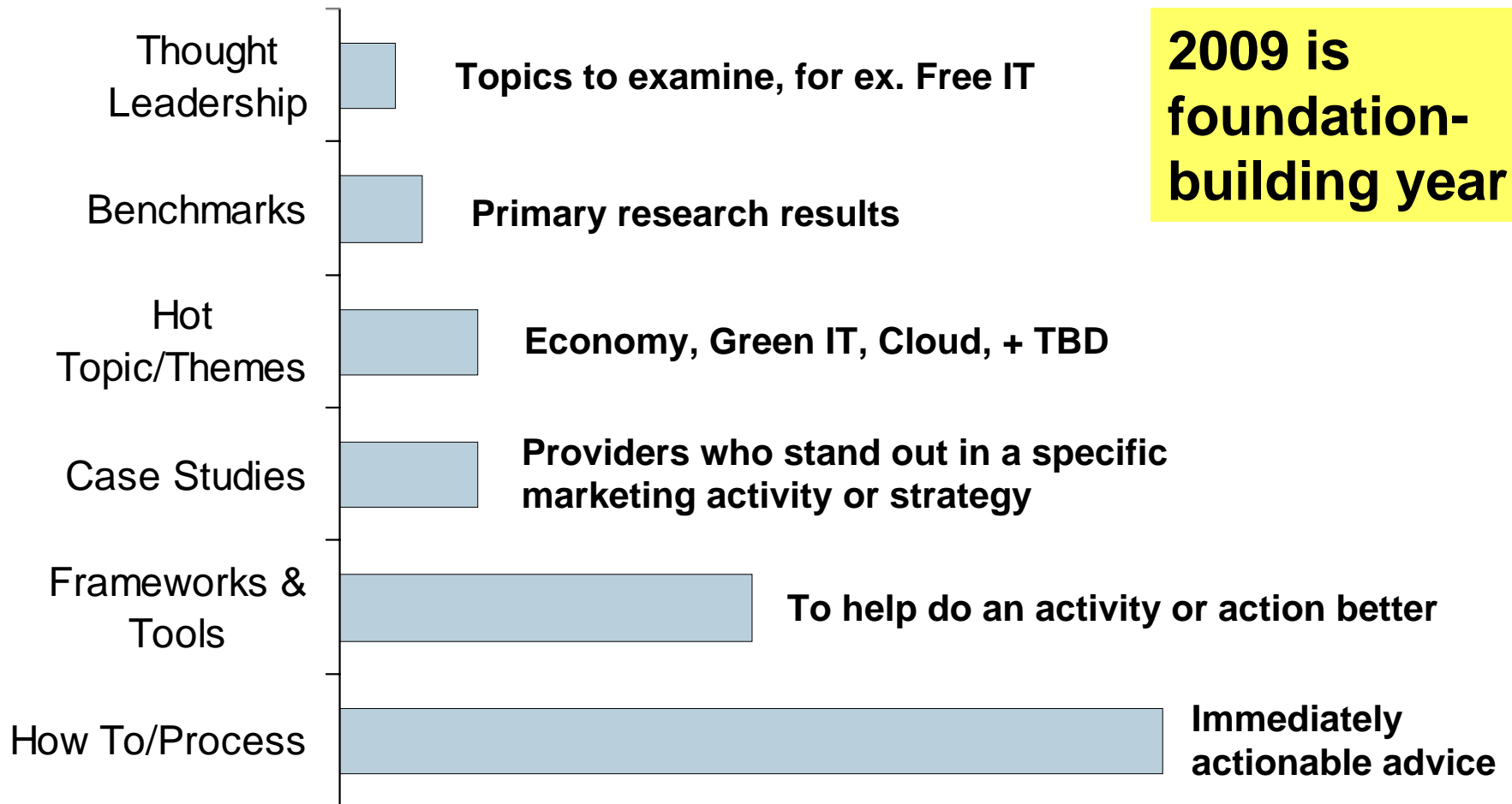
## Communicate:

- Manage the brand
- Manage customer relationships
- Implement marketing communications

## Execute:

- Execute plans:
  - Product development
  - Product promotion
  - Sales readiness
  - Customer experience
- Manage Marketing
- Manage Indirect Channels

# Proposed 2009 Marketing Essentials Content Breakdown by Type



# Sample of 2009 Marketing Essentials Documents

- **Examine**

- Marketing budgets 2009 (from primary research)
- Marketing goals & responsibilities 2009 (from primary research)
- Activity cycle for HTTP marketing

- **Plan**

- Framework to build a market entry strategy
- How to build the business case for partnering
- How to effectively recruit indirect sales channel partners
- How to build indirect sales channels into product development
- How to build a marketing plan - frameworks that work
- How to build indirect sales channels into product development

- **Plan (continued)**

- How to choose the best routes to market
- Framework for market segmentation analysis
- Framework for go-to-market planning

- **Execute**

- How to market to and with indirect sales channels
- How to generate leads in a soft economy
- How to write an effective sales proposal
- How to use social media in marketing, sales and relationship management
- How to generate more share of customer wallet

- **Communicate**

- How to create the perfect elevator pitch

■ ■ ■ ■ **Gartner 2009 Research  
Agenda for Technology &  
Service Providers**  
- **Industry Market Strategies**

**Venecia Liu**  
**Research Director**  
**Technology and Service Provider Group**  
**Industry Market Strategies**

# Pain Points for Vertical Market IT Providers

Market Conditions Causing Fear, Uncertainty & Doubt

## Customers

What are industry-specific customer buying behaviors?

Critical business issues for industry executives?

## Markets

Saturated horizontal markets-where to go next?

Which of 54 vertical markets and sub-markets do I target?

What are hot IT solutions in this industry?

Vertical market size and growth rates? By product? By geography?

## Marketing Essentials

How to create effective vertical market strategies?

Who are my best industry partners?

## Competitors

Who are my leading competitors?

What delivery methods offer best opportunity?

## Technology

What are most promising emerging technologies?

# Key Research Themes for 2009

## Equipping Tech Providers to be “Better, Faster, Stronger”

- How to target the industry more effectively
  - “Marketing Essentials Doc”
- How to beat the competition
  - “Competitive Landscape” documents
- Where business can be found in 2009
  - User Wants and Needs
- How the industry will shape up, future outlook, vision
  - Vertical 2012

# 2009 Agenda: Industry Market Strategies

- 1Q09
  - User Survey Analysis (primary research data results)
    - Banks and Insurers: Spending Plans through the Financial Crisis
    - Regional (Retail in India, Carrier Requirements in Russia)
    - Healthcare adoption of IT
  - Industry Outlook for 2009
  - Forecast data cubes
    - Global
    - Regional
    - Industry-specific
- 2Q09
  - Competitive Landscapes (by major industry)
  - Industry specific solutions topic
  - Key Issues in Industry Market Strategies
- 3Q09
  - Marketing Essentials
  - Primer updates: Manufacturing and Insurance
  - BRIC –India
- 4Q09
  - *Vertical 2012*
  - Forecast data cubes

# Gartner Vertical Market Expectations for IT Spending Through 2009

## Positive

Broadcast  
Hospitals  
Military Aerospace and Defense  
Petroleum and Coal  
Pipelines

## Neutral

Air Transport  
Asset management  
Cable and Pay TV  
Chemicals  
Clinics  
Food and Beverage  
Grocer  
High Technology  
Insurance  
Midsize Banks  
Nursing  
Pharmaceutical  
Restaurant & Hotel  
Warehousing (3PL, 4PL)  
Wireless

## Negative

Automotive  
Building Materials  
Commercial Banking  
Consumer Finance  
Fixed Line, Wireline  
Industrial Equipment  
Investment Banking  
Motor Freight  
Paper and Metals  
Physicians  
Retail Banking  
Rail and Water  
Specialty Retail

# Industry Market Strategies WW

## Analyst Coverage, 2009



**Robert L. Goodwin,  
MVP**  
Transportation



**Susan Cournoyer**  
*Managing Research VP*  
Financial Services



**Kenneth F. Brant**  
*Research Director*  
Manufacturing



**Vittorio D'Orazio**  
*Principal Research Analyst*  
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**Derry N. Finkeldey**  
*Principal Research Analyst*  
Industry Markets APAC



**Venecia K. Liu**  
*Research Director*  
*Research Area Lead*  
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**John-David Lovelock**  
*Research VP*  
Healthcare



**Cynthia Moore**  
*Research VP*  
Energy & Utilities



**Jeff Roster**  
*Research VP*  
Retail



**Rishi Sood**  
*Research VP*  
Government



**Katsushi Shiga**  
*Research Director*  
Industry Markets Japan

# ■ ■ ■ ■ Additional Q & A

# Upcoming 2009 Gartner AR Community Activities

- Another Q1 ATC – Week of February 9, 2009

## *Topics Under Consideration*

- Gartner Q2 Product Releases
  - Economic Slowdown Impact on IT Spending – An Update
  - Industry Advisory Services – 2009 Research Agenda
- 
- Please send feedback and requests to:  
[ARCommunity@gartner.com](mailto:ARCommunity@gartner.com)