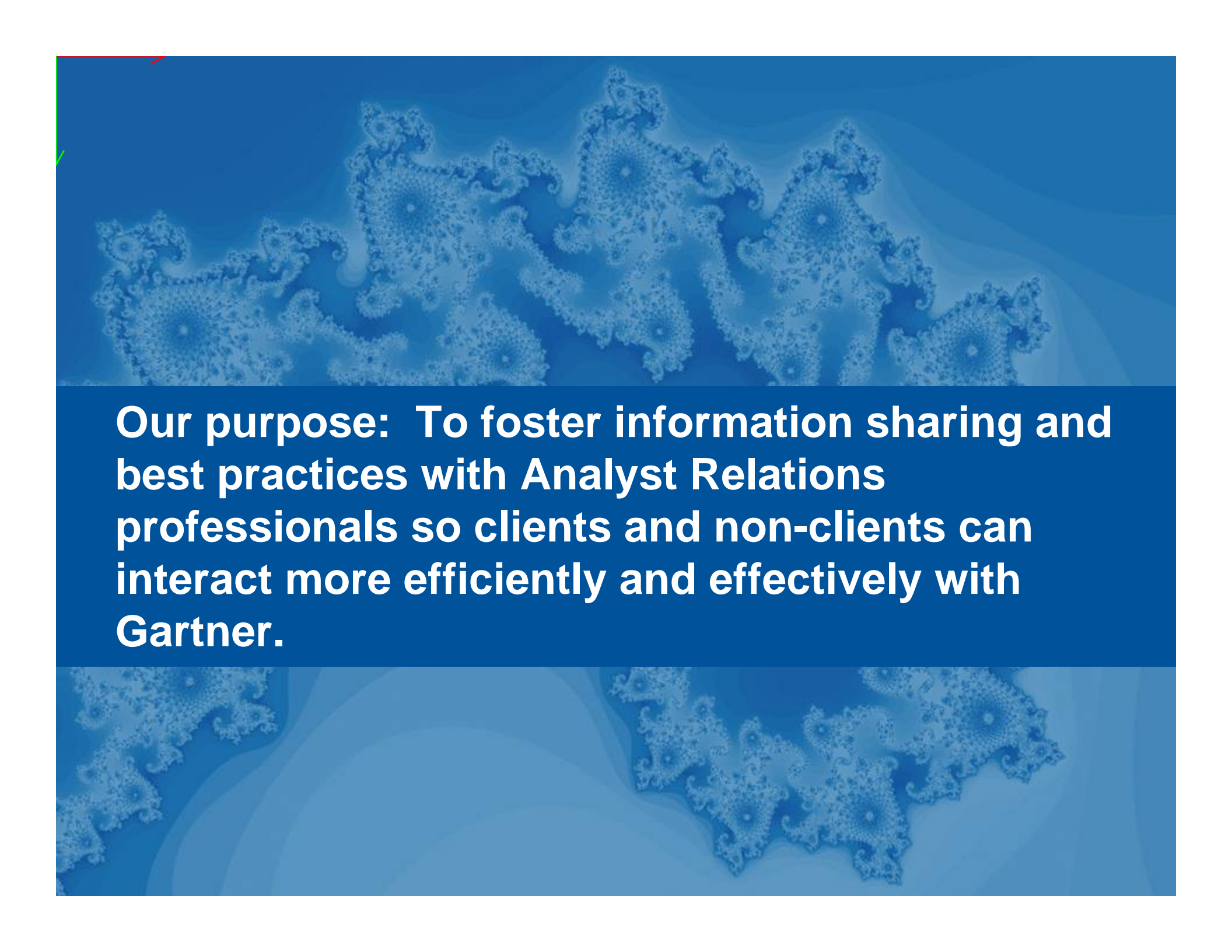




■ ■ ■ ■ **Gartner AR Community**
Quarterly Teleconference

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

December 9 and 10, 2008



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
- Gartner Strategy for Analyst BIO Publishing
 - Andy Rosenblatt, vice president, high tech and telecom programs
- Publishing Extension Exception for Gartner Reprints of Magic Quadrants
 - Jeff Golterman
- Agenda Evolution for Gartner Market-Facing Research and Future Plans for Revenue & Shipment Data Collection
 - Mike Harris, group vice president, technology and service provider research
- Community Discussion – How are AR teams altering their strategies in light of market economic challenges?
 - Our moderator will pose questions to the Community for live discussion and learning.
- Wrap-Up and Heads-Up for Gartner AR Community Calendar
 - Jeff Golterman

New and Improved Gartner Analyst Biographies

Which elements of the new Gartner Analyst Biographies will appear on classic gartner.com and when will they be available?

The following items are currently available on both classic gartner.com as well as in the new role based offerings (as of Nov. 7, 2008).

Biography Component	Classic gartner.com	Role Based Offerings
• Coverage Area Information	✓	✓
• Roles and Responsibilities	✓	✓
• Previous Experience	✓	✓
• Snapshot – Including Years of Experience, Education, Languages & Awards/Accolades	✓	✓
• Recent Research	✓	✓
• Background	✓	✓

Several additional enhancements are planned for the classic gartner.com analyst biographies; we will announce those changes and release dates as they become available.

Gartner's Research Agenda Will Appear on gartner.com

When will the Gartner Research Agenda, currently available on Gartner for Analyst Relations, be available for users of classic gartner.com?

The Gartner Research Agenda is available to all Gartner clients.

- If you are a Gartner for Analyst Relations user you can access the Research Agenda from the Tools section of your homepage
- If you are a client but not a Gartner for Analyst Relations user, please email BusinessLeaders@gartner.com and we will be happy to send you a copy
- The Research Agenda is scheduled to be available to clients on classic gartner.com on February 6, 2009
- The Magic Quadrant and Marketscope publishing schedule continues to be available to all gartner.com users
- There are currently no plans to make Gartner's Research Agenda available to non-clients

Reprints of Gartner Magic Quadrants delayed in Publishing Can be Requested for Extension

Is it possible to “keep live” a purchased Gartner Reprint of a Gartner Magic Quadrant for longer than 12 months should the updated version of the same MQ be delayed in its delivery?

- From time to time, a Gartner Magic Quadrant replacing a previously published one is delayed in its delivery.
- If clients had purchased a Gartner reprint of the MQ (maximum lifespan, 12 months), they were occasionally left without a “live” Magic Quadrant reprint to use.
- We will provide an extension of up to three months for use of the original Magic Quadrant reprint, with approval of the GVP Research from the area in which the Magic Quadrant was primarily generated.
- Any clients wishing to request an extension of a reprint under these circumstances should contact their Gartner account executive for assistance.

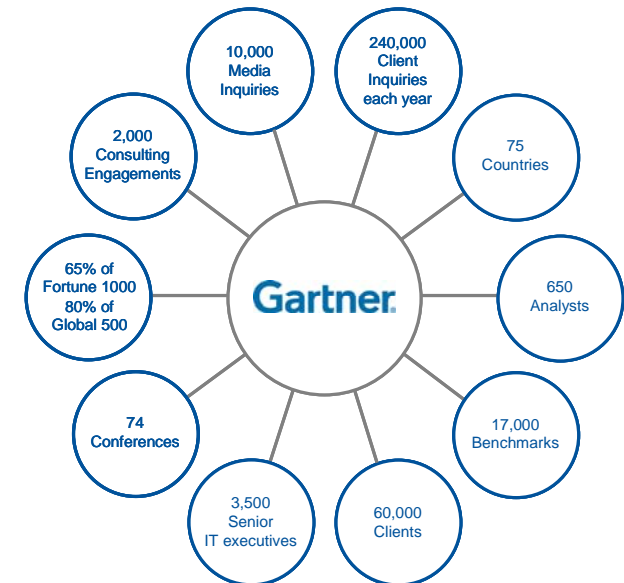
Why We Don't Allow Multiple Years' Magic Quadrants to be Reprinted

Can a Gartner client purchase Gartner Reprints for successive years' Gartner Magic Quadrants?

- Markets covered within Gartner Magic Quadrants change from year to year.
- Positioning of any one high-tech provider, is only relative to that year's weightings and ratings.
- Therefore, comparing successive years' positioning in a Gartner Magic Quadrant is often not an equal comparison.
- For this reason, we continue our current position of approvals for 12-month reprints and not beyond, including successive years.

Gartner Provides Insights and Actionable Advice to Help Technology & Service Providers Grow

- **Understand Target Customers:** Use exclusive insights on your customers to innovate new products and market more successfully.
- **Target High-Growth Markets:** Identify global growth markets and penetrate distinct customer segments
- **Compete:** Position more effectively against global competition and win business.
- **Innovate:** Spot truly disruptive technologies and use them to your advantage.
- **Leverage Best Practices:** Apply industry-leading channel strategies, marketing benchmarks, and best practices for your role.



Agenda Framework for Technology & Service Provider Research

Customers

What are the major concerns, preferences and buying behaviors of our customers and prospects?

Markets

Which markets offer the greatest growth opportunities and what is the right entry strategy?

Best Practices

How can we optimize our distribution channels?

Technologies

Which emerging technologies can disrupt or accelerate our strategic objectives?

Competitors

How are our competitors positioning themselves and how can we respond effectively?

How Gartner delivers Insights into your customers and prospects

1. What they are **searching for most** on Gartner.com?
2. What they are **reading** on Gartner.com by user role or industry?
3. What **toolkits** are most popular by user role?
4. What **research topics** are most popular by role?
5. What **inquiry topics** they are asking for help with?
6. What **vendors** are mentioned in search or analyst-client discussion, how often and how does it trend?
7. At what lifecycle **decision stage** are their discussed initiatives?
8. What important **trends in customer concerns** demand vendor reaction?
9. Which **user job roles** are asking about what topics?
11. What **user surveys** reveal about their plans & opinions?
12. Which **magic quadrants** and **hype cycles** are just published and most read?

Customers

- ✓ Search Wizard
- ✓ Customer Trends
- ✓ Most Read
- ✓ Customer Trends
- ✓ Customer Insights
- ✓ Search and CI Wizards
- ✓ Customer Insights

How Gartner delivers

Clarity on which markets to target & the right entry strategy

1. Analysis of IT end-user spending expectations by **industry sector**
2. Which **trends in industry** hot topics are revealed quarter by quarter?
3. Assessments of **emerging geographies** and their growth potential
4. Insight into key **industry-specific processes** and applications
5. Focus on effective product management and **marketing strategies**
6. Detailed product and service **market forecasts** by region, country, updated quarterly, half-yearly or annually
7. Direct and indirect **channel analysis**
8. **Global industries** market forecasts across 40 countries and 42 vertical sectors.

Markets

- ✓ IT Budgets Survey
- ✓ Heat Maps
- ✓ Emerging Market Analysis
- ✓ Key Issues by Sector
- ✓ Market Strategies
- ✓ Market Forecasts

How Gartner delivers Evaluations of current & emerging competition

1. Strengths, weaknesses, opportunities and threats for providers in different markets
2. How does Gartner rate provider offerings on **strategic vision and ability to deliver** compared with competitors?
3. How do competitive products compare in **emerging and mature markets**?
4. Assessments of **emerging competitors** that have caught Gartner's attention
5. Commentary on relevant **industry events or news** and their impact on the market
6. What vendors are mentioned in **search or analyst-client discussion**, how often and how does it trend?
7. How have competitors **performed**?
8. Analysis of **competitor volumes & revenues**
9. Estimation of resulting **market size**
10. Financial and unit volume **market shares** growth or decline

Competitors

- ✓ SWOT Analyses
- ✓ Magic Quadrants
- ✓ MarketScopes
- ✓ Cool Vendor Reports
- ✓ First-Takes
- ✓ Customer Insight Wizard/Trends
- ✓ Market Share Data

How Gartner delivers

Assessments of key technologies and their real impact

1. When is the **pay-off** for new technologies? Compare your understanding of a technology's evolution against that of Gartner
2. Technology impact analysis – reduce the emotion around claims of a **technology breakthrough**
3. What **emerging technologies** do you need to monitor, because they can either disintermediate you or your competition?
4. What will be the specific **competitor impact** of technology advancements – who wins and who loses?
5. Which technologies and vendors are **clients searching for** on gartner.com? Asking about in inquiry?

Technologies

- ✓ Hype Cycles
- ✓ Emerging Technology Reports
- ✓ Key Issues Documents
- ✓ Technology Strategies

How Gartner delivers Best Practices for Marketing Activities

1. What **channel strategies** should your organization pursue, based on target verticals?
2. For your key geographic markets, which **channel partners** will prove most effective?
3. How should your solutions be targeted specifically to the **small and medium business** client, as distinct from the large enterprise buyer?
4. How do you compare with other technology and service providers in terms of **marketing practices and budgets**?
5. Best practices for key **marketing activities** – leverage expertise from other sectors of the industry

Best Practices

- ✓ Marketing benchmarks
- ✓ Channel analyses
- ✓ Best practices in partnerships
- ✓ Best practices in alliances

Intended changes to revenue and shipment data collection for 2010

- **Context:** This community told us in Cannes (and elsewhere) that Gartner is inconsistent in the way we gather information from you
- **What we'll do:** Throughout 2009, Gartner will be working to improve its survey process for collection of revenue and shipment data from technology & service providers
- **Objective:** Ensure high quality data: accurate, consistent, and transparent
- **Resources:** We have invested in tools (common database infrastructure) and people (Chief Forecaster across all market segments) to improve in this important area
- **Benefit:** Improved process for technology & service providers, yielding less redundancy and greater consistency
- **Approach:**
 - Create a single, definitive “company sheet” for a subset of technology & service providers
 - Assign an analyst responsible for managing the overall revenue allocation for each provider
 - Synchronize the cadence for surveying as much as practical
- **Your input:**
 - Where are your greatest pain-points?
 - Specific practices we should adopt?

Are Current Economic Conditions Driving Change in Analyst Relations Practices?

This session will be an open-microphone “virtual panel” where the community can share perspectives and ask questions of peers.

As an Analyst Relations professional, in today’s economic climate...

- What new challenges do you face?
- What new questions are you getting from your management? Your customers?
- Have you altered your approach to relationships with IT Industry analysts?
- What different outcomes are you looking for from Analyst Interactions?
- What specific advice would you give to your AR peers on this call?
- What related research can the AR Community deliver to best help you?



■ ■ ■ ■ Additional Q & A

2009 Gartner AR Community Agendas Will be Further Driven by Your Priorities

- Q4 Analyst Relations newsletter
 - December 15, 2008
- Q1 AR Community Survey
 - We look forward to your participation in an on-line survey in early January
 - We'll present the results at upcoming events
 - Your priorities will drive agendas for future AR Forums, ATC's and Newsletters
- Quarterly ATC – Q1 2009
- Gartner AR Forum At Spring Symposium/ITxpo
 - Las Vegas,
 - Barcelona