

# 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.**

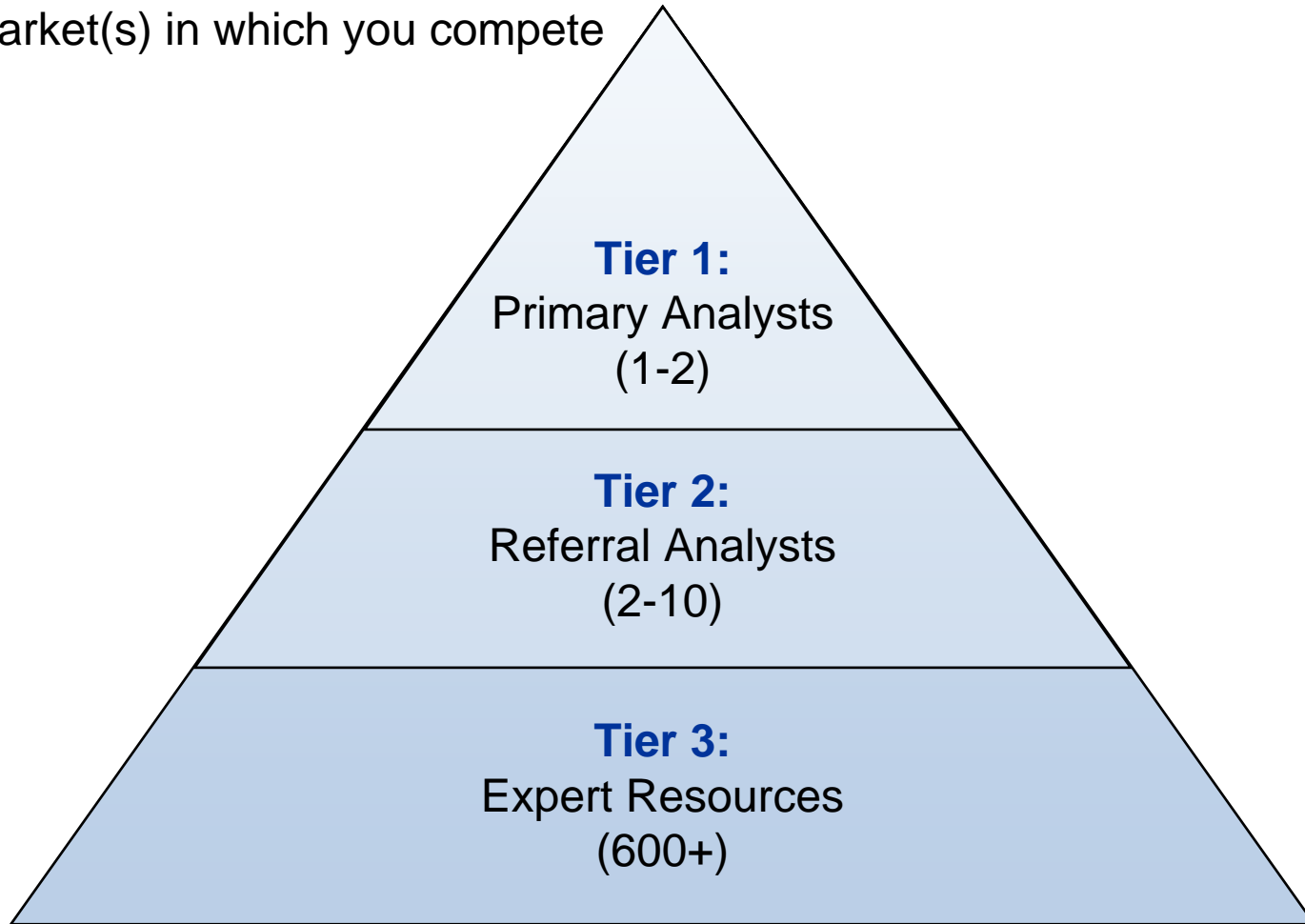
- We will tell (we may even write) why clients should look at you. But if your sales force is disorganized and your marketing is invisible, then it will not sell.

**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

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

## 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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