



■ ■ ■ ■ **Gartner AR Quarterly ATC**
September 9, 2008

Jeff Golterman

GVP, Gartner High Tech and Telecoms Programs

Gartner Analyst Relations Community Lead

Today's Agenda

Tuesday September 9, 11:30 am and 7:00 pm

Welcome

Jeff Golterman, group vice president and Gartner AR community leader

Gartner Magic Quadrant Reference Checking Process

Jenni Lehman, group vice president, Gartner Research Operations

Best Practices: Customer References – Peer Perspectives

John Taschek, vice president market strategy, Salesforce.com

Best Practices: Vendor Briefings – Gartner Analyst Perspectives

Michael Maoz, vice president and distinguished analyst Gartner Research

Heads-Up: New Content Available for AR Professionals

Andy Rosenblatt, vice president, Gartner High Tech and Telecoms Programs

Heads Up: New Quote Policy Coming in September

Nancy Erskine

Q & A

Wrap-Up

Gartner Process for Vendor Reference Checking

Purpose:

During Gartner's Interviews of Analyst Relations professionals, you've expressed a deep interest in clarifying Gartner's references policies

An Important Issue:

- Reference checking spans many Gartner Research methodologies
- Critical for both analysts and provider clients
- End User client reference relationships are important for you and Gartner

Read More: "Gartner FAQ document on Research Process Steps for Magic Quadrants and Marketscopes": http://www.gartner.com/it/docs/MQ_MS_FAQs_May_2007.pdf

- Jenni Lehman, group vice president, Gartner Research Operations

Customer References: Peer Perspectives

Purpose:

To provide Analyst Relations professionals with Best Practices – as seen by an analyst relations peer



Customer References: Peer Perspectives

Reference Philosophy

- References are our #1 Priority
- References are nurtured over time
- Relationships with our customers span **all** departments and employees
- We listen and we execute



Customer References: Peer Perspectives

Top 10 Practices

1. Build and evolve executive relationships
2. Maintain frequent communication with as many customer employees as possible
3. Employ metrics to ensure customers are successful
4. Make sure that successful customers are part of every person's success plan
5. Integrate survey data into CRM system
6. Don't react to a request for references
7. Educate references on Gartner's goals
8. Encourage reference spokespersons to be absolutely fair and objective
9. Build references that can accomplish specific goals.
10. Read the Gartner reports. Know the analysts!

salesforce.com

Salesforce.com Confidential -- For Internal Use Only



Gartner Analyst Briefings: Analyst Perspectives

Purpose:

To provide Analyst Relations professionals with Best Practices – as seen by one of Gartner's experienced and most senior analysts

An Important Issue:

- Briefing Gartner analysts is a significant effort for providers
- Analyst briefings are often attended by vendor senior executives; stakes are high
- Analyst relations professionals seek ways to streamline and optimize the results

Michael Maoz, vice president, distinguished analyst, Gartner Research

Heads-Up: Gartner for Analyst Relations - New Functionality for AR Professionals

Purpose:

Provide visibility into the unique insights and new tools developed specifically for AR professionals as well as an overview of some of the new content delivered in Gartner for Business Leaders offerings.

Through a live demonstration we'll cover:

- Unique insights derived through...
 - My Company Dashboard
 - Readership Demographic Reports
- New content including SWOT, Emerging Market and Emerging Technology reports
- Productivity tools such as...
 - Company and Market Tearsheets
 - Analyst Relations Toolbox
 - Analyst Fast Finder and improved analyst bios

Save the date: September 23, 2008 from 11:00 – 12:00 Eastern. Invite to come...

- Andy Rosenblatt, VP, high tech & telecoms product management

Heads-Up: New Policy for Quoting Gartner Analysts

Purpose:

An updated copyright and quote policy makes it easier to quote Gartner when time is of the essence and the audience is limited.

In our upcoming Analyst Relations Newsletter we will cover:

- Why we're updating our policy
- How our high tech provider clients will benefit
- Situations where our new quote policy will apply

Look For: Gartner Analyst Relations Newsletter arrival Week of September 22

- Nancy Erskine, group vice president, Office of the Ombudsman



Q & A

Heads Up: Gartner Analyst Relations Forums at US and European Symposia

***Tuesday October 14, 3:00 pm, Orlando
Tuesday November 4, 3:00 pm, Cannes
Sydney Dates and Times – Stay Tuned!***

Welcome

Jeff Golterman, group vice president and analyst relations community Leader

Gartner Strategy Update

Gene Hall, chief executive office

High Tech and Telecoms Update

Michael Yoo, senior vice president, Gartner High-Tech & Telecom Programs

Gartner Research Update

Peter Sondergaard, senior vice president and global head of Gartner Research

Panel Discussion: Working Effectively With Gartner Throughout the Magic Quadrant Research Process

Panelists will include AR professionals and representatives of Gartner Research

Q & A

We look forward to seeing you there!