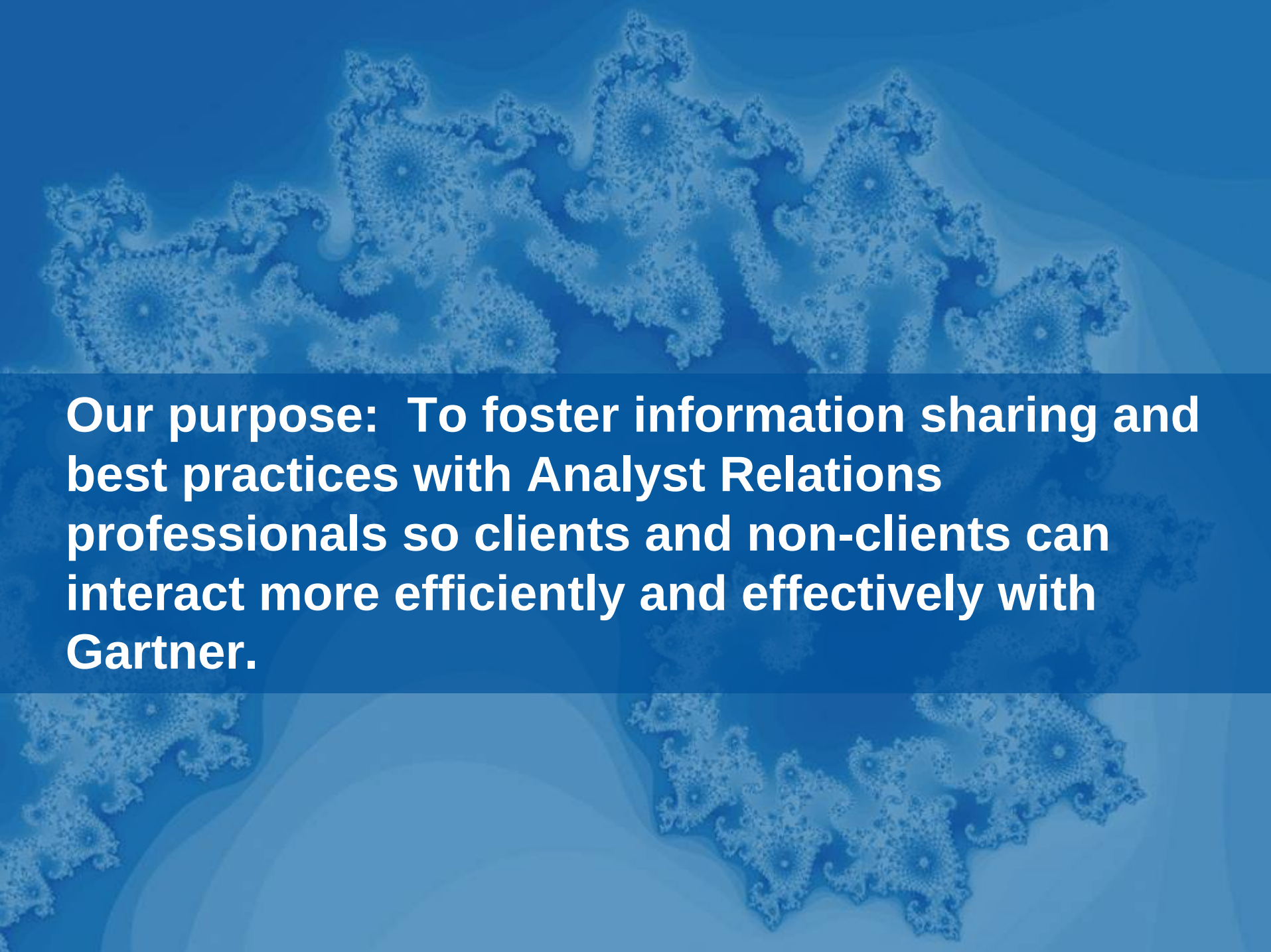




Gartner AR Community Quarterly Teleconference

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

January 27 and 28, 2009
Version 3.0

The background is a solid blue color with intricate, light blue fractal patterns. These patterns resemble complex, branching structures like snowflakes or coral, scattered across the slide. A semi-transparent dark blue horizontal band spans the middle of the image, serving as a backdrop for the white text.

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

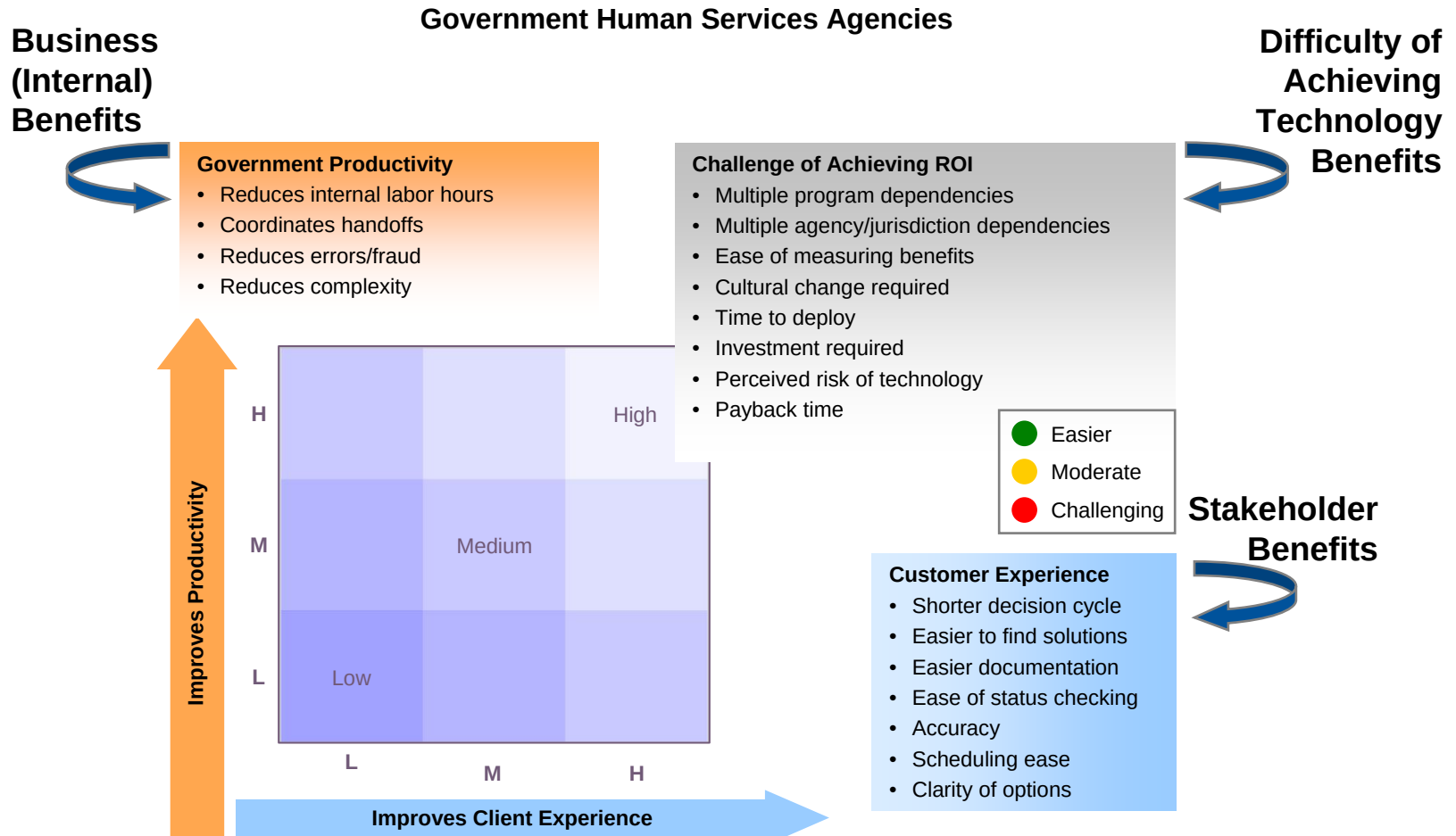
Research Agendas and Document Tagging

- 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

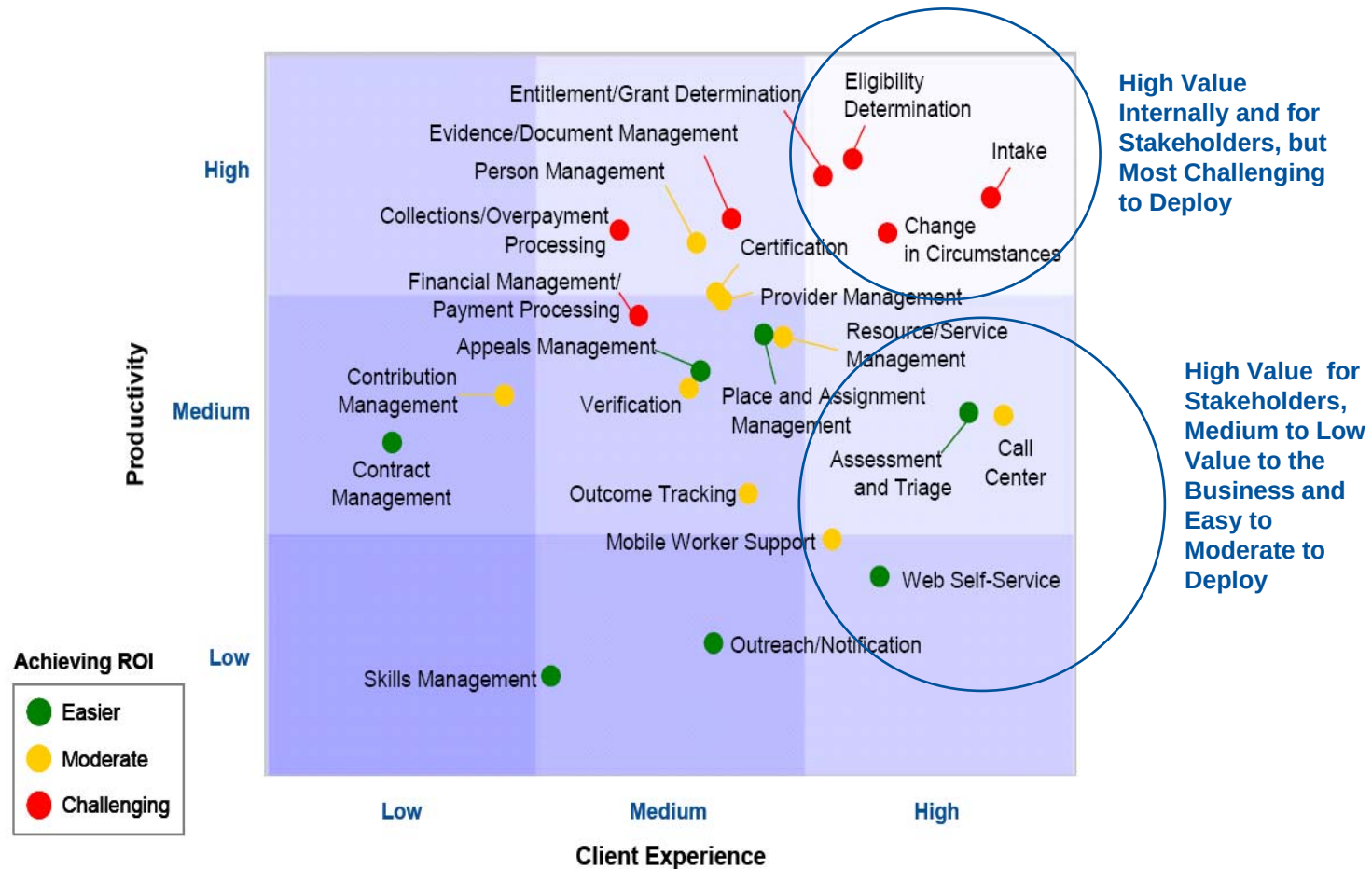
- Responses to the conceptual depiction of the proposed Strategic Technology Map methodology were uniformly positive.
- The benefits of the methodology were readily apparent to both Users and Vendors.
 - Among Users, expected usage included management presentations, strategic planning, budget planning 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



Source: Gartner (July 2007)

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

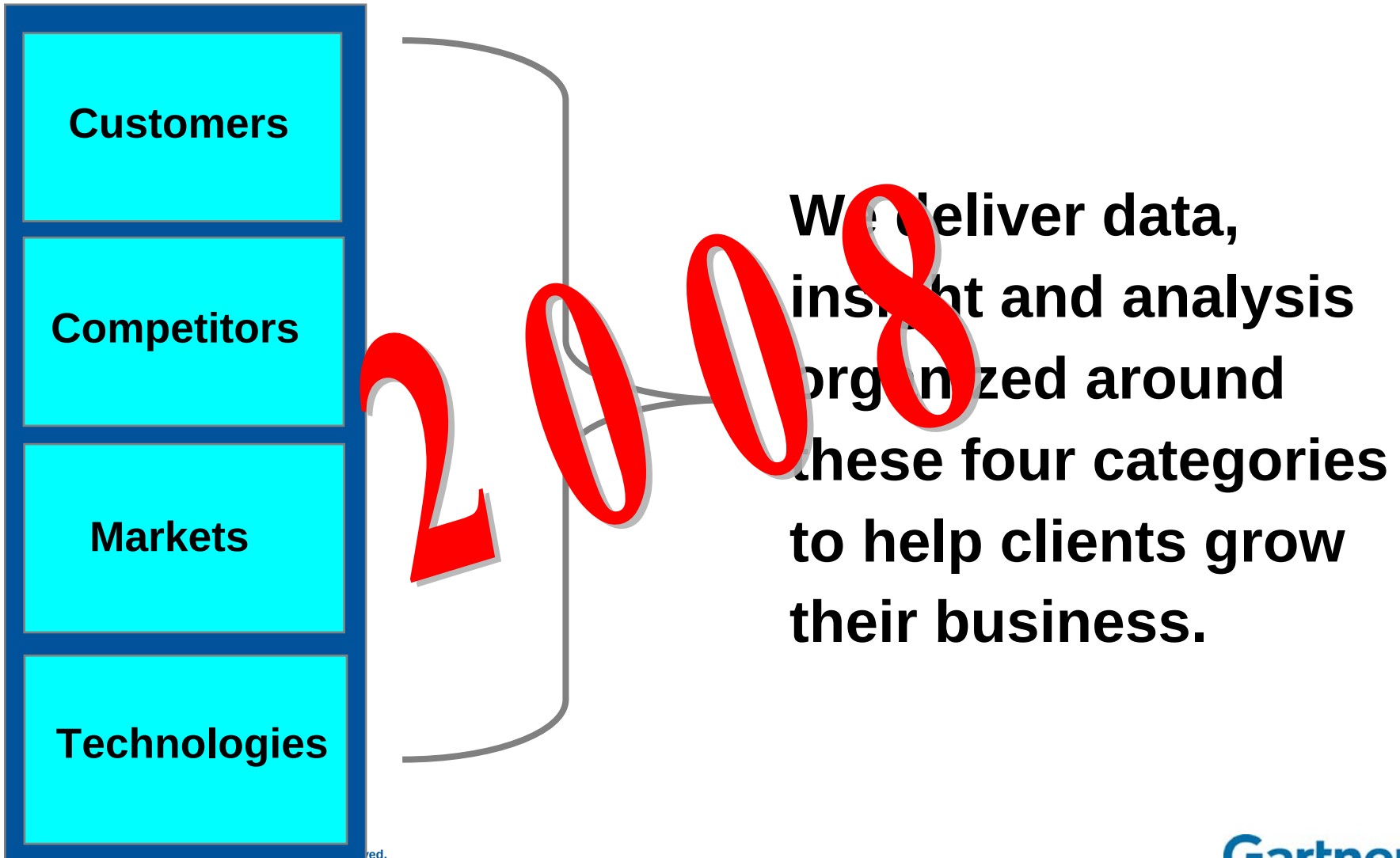
■ ■ ■ ■ Gartner 2009 Research Agenda for Technology & Service Providers

- Overview
- Themed Research

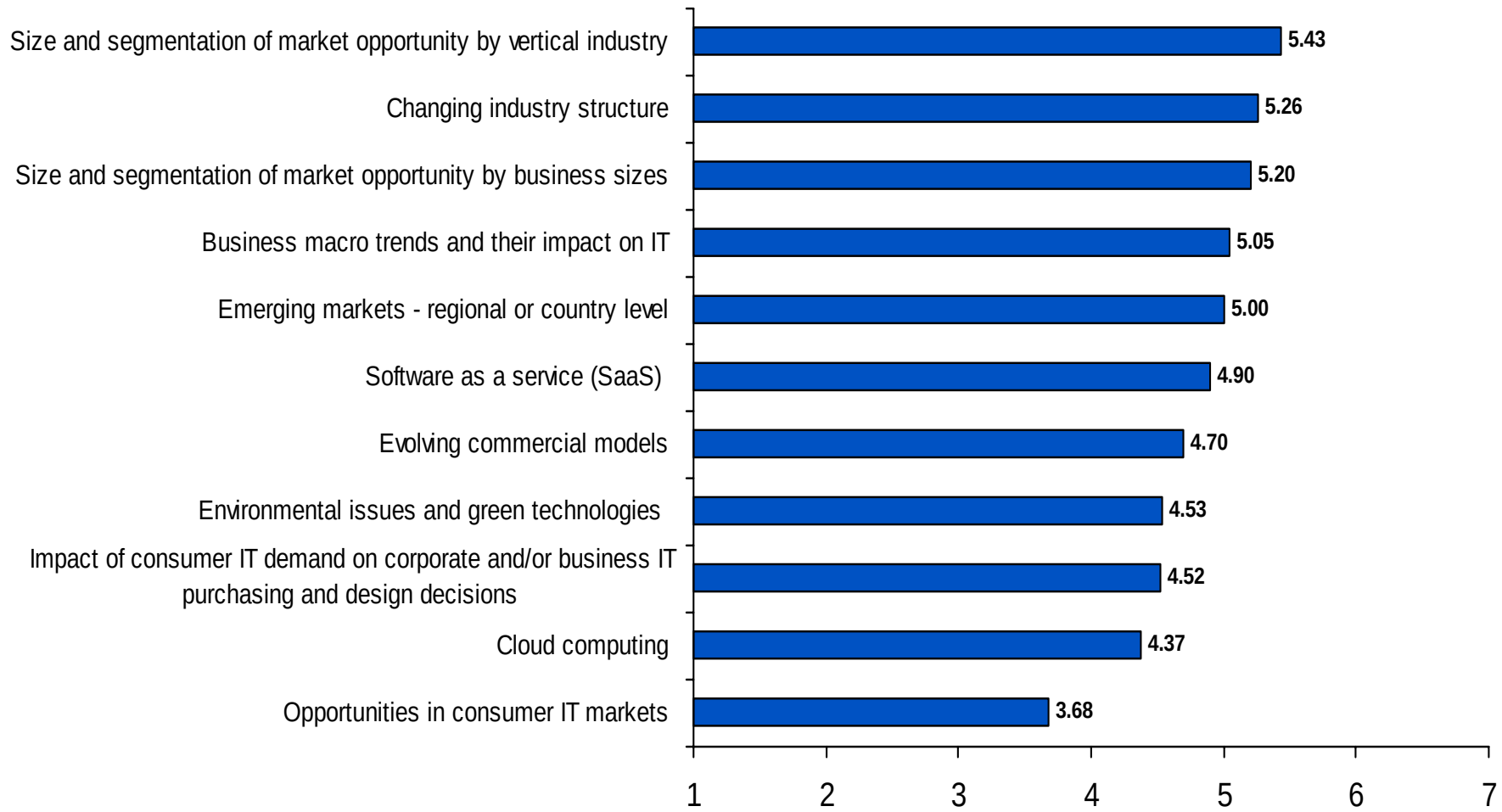
Simon Hayward
Role Service Director
Technology and Service Provider Group
Gartner Research

Gartner for Business Leaders

Framework for Delivering Research



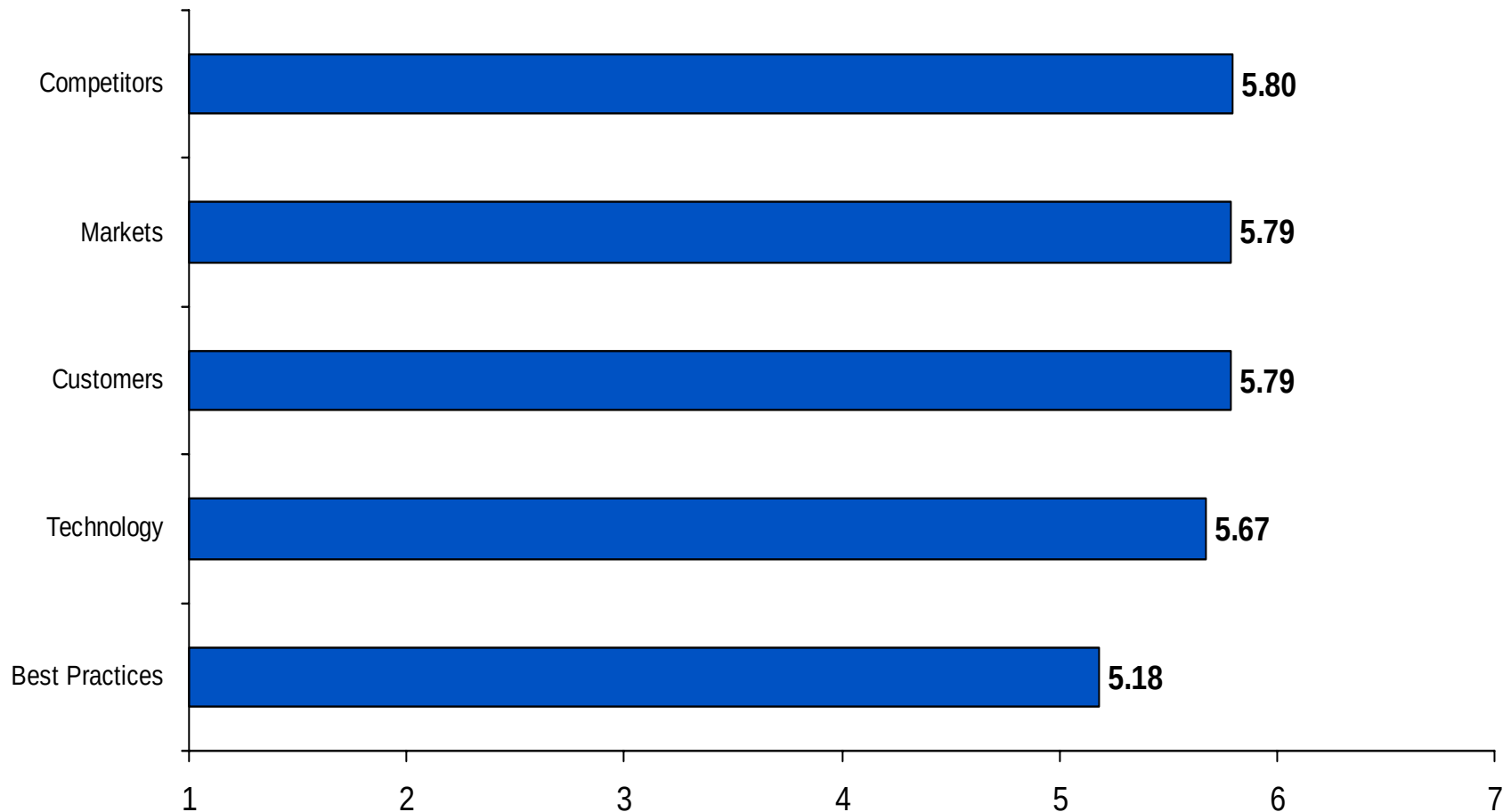
Macro business / Technology trends: how important is having accurate research and advice



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

Survey IT suppliers, Q4 08
n=547

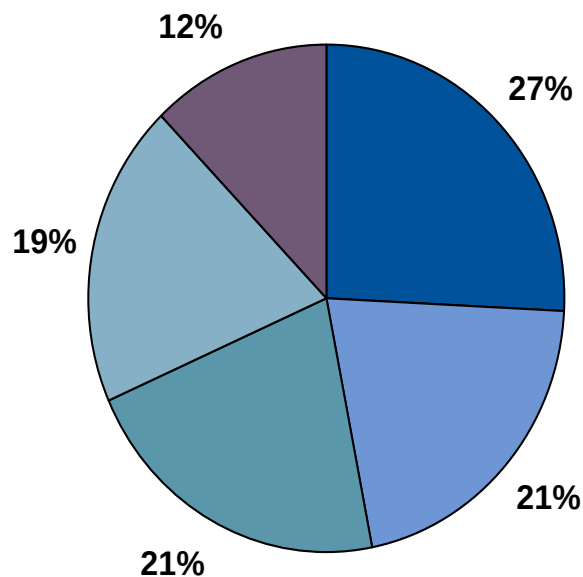
Topic areas: how important



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

Survey IT suppliers, Q4 08
n=547

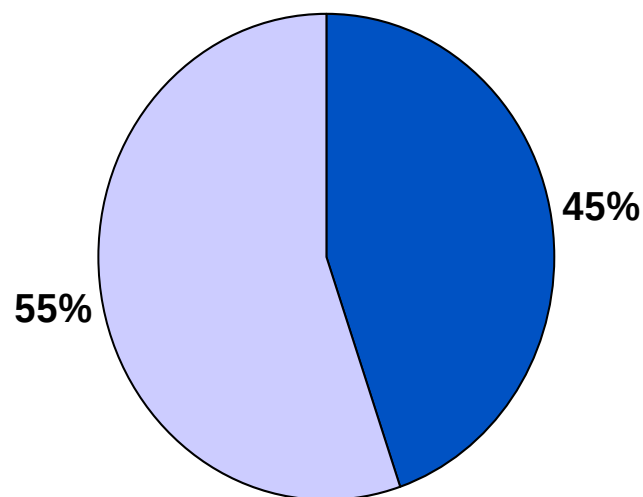
Hypothetical budget allocation: Topic areas



■ Markets ■ Competitors ■ Customers ■ Technology ■ Best Practices

Survey IT suppliers, Q4 08
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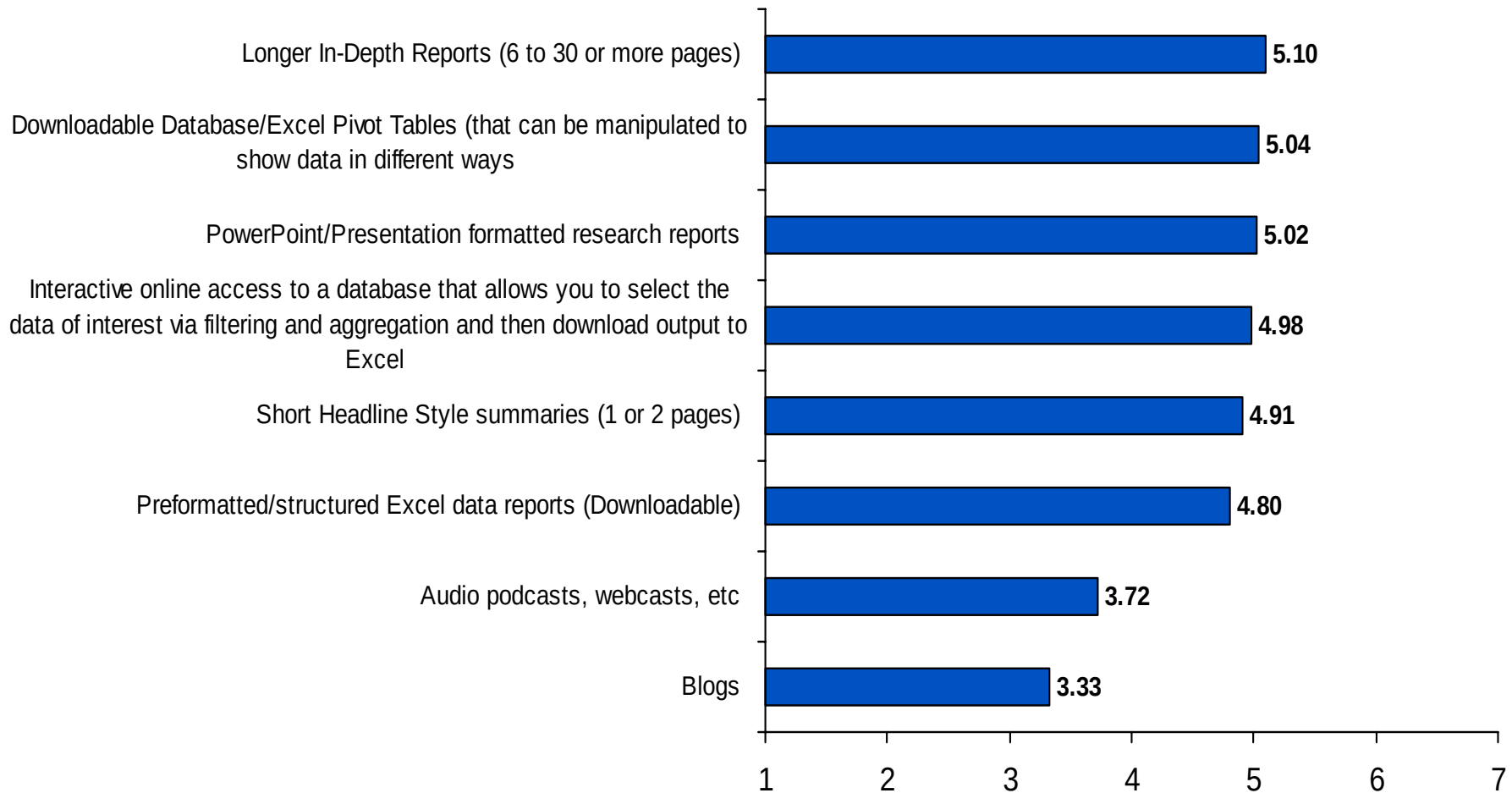
Hypothetical budget allocation: Emerging Markets



■ Emerging markets ■ Mature markets

Survey IT suppliers, Q4 08
n=547

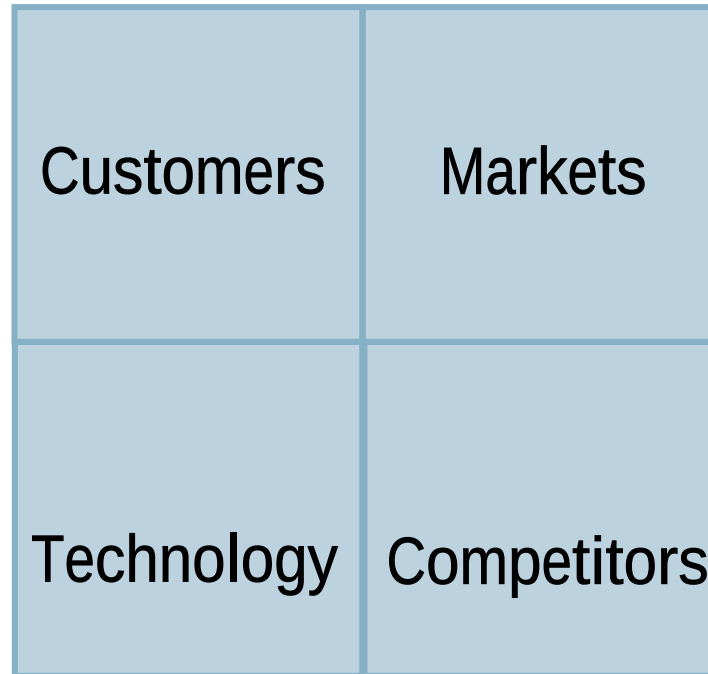
Preference for delivery format of research



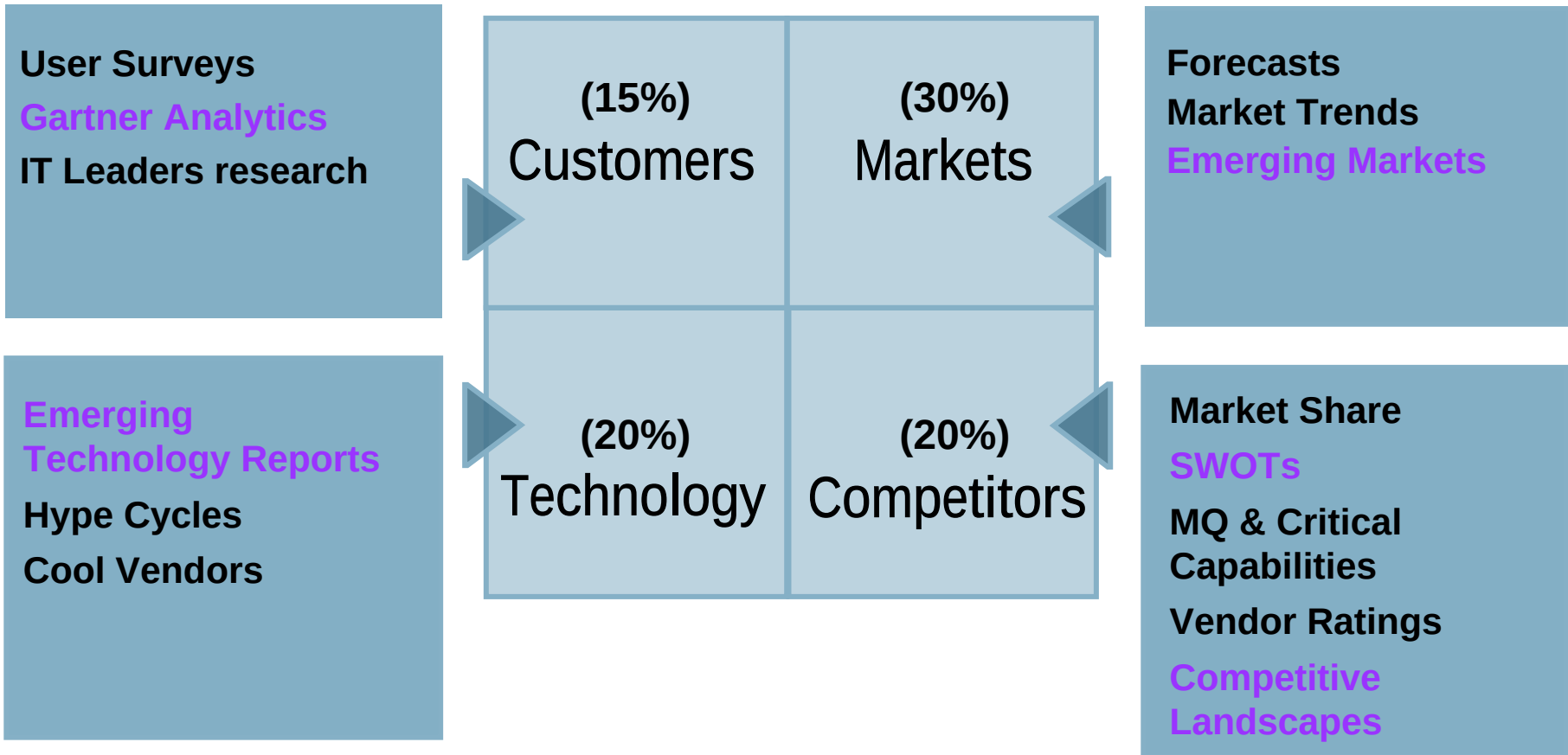
7-point scale: 1 = not at all important, 7 = critical

Survey IT suppliers, Q4 08
n=547

T&SP Research Agenda Framework 2009

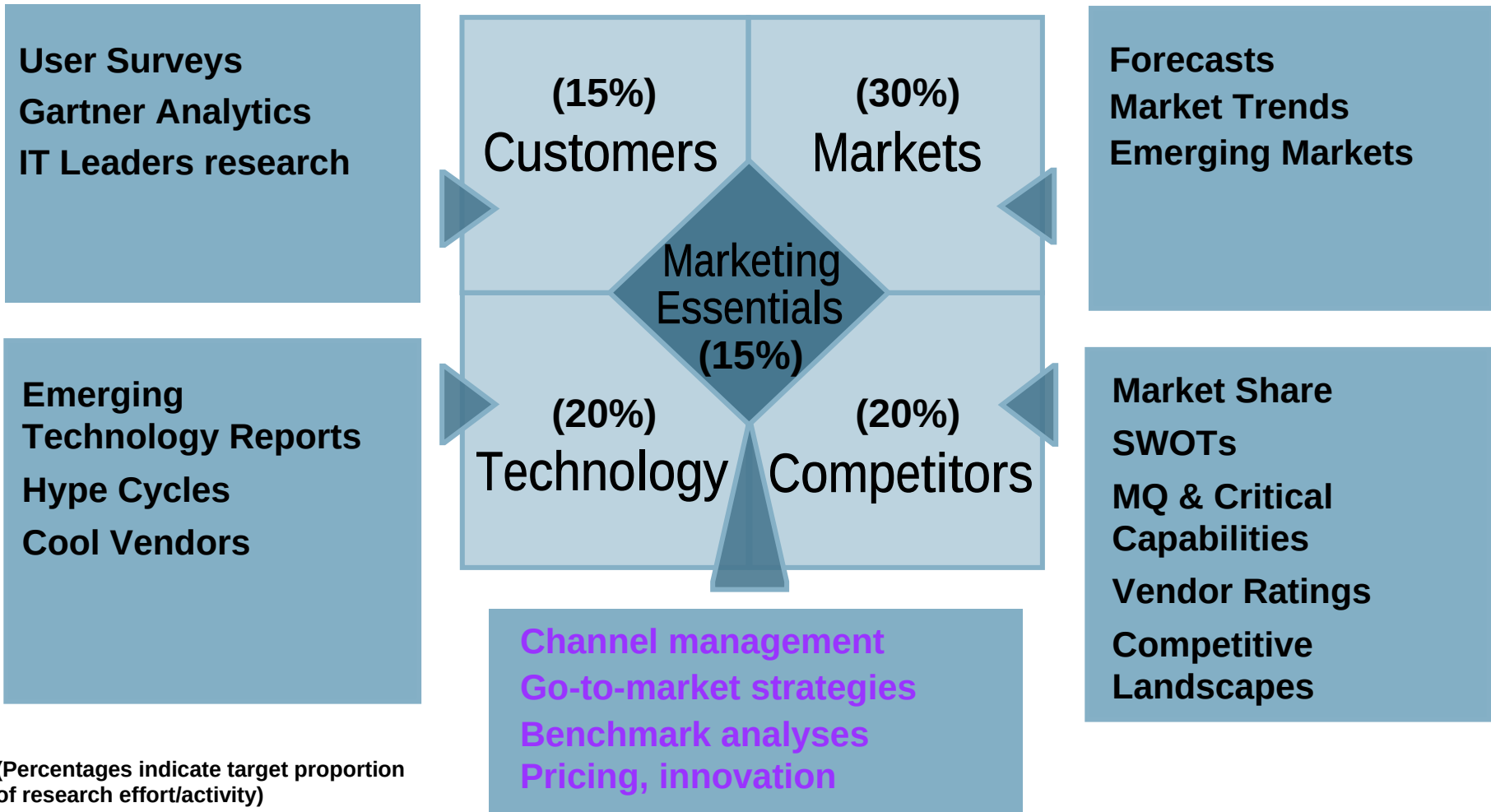


T&SP Research Agenda Framework 2009



(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.”

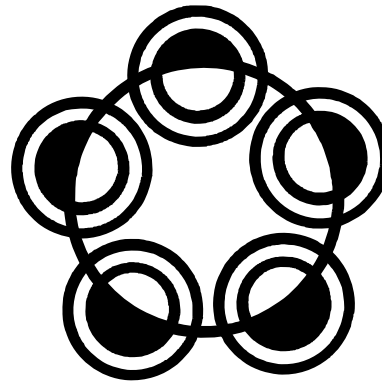
Activity Cycle for Marketing (to be introduced Feb. 2009)

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

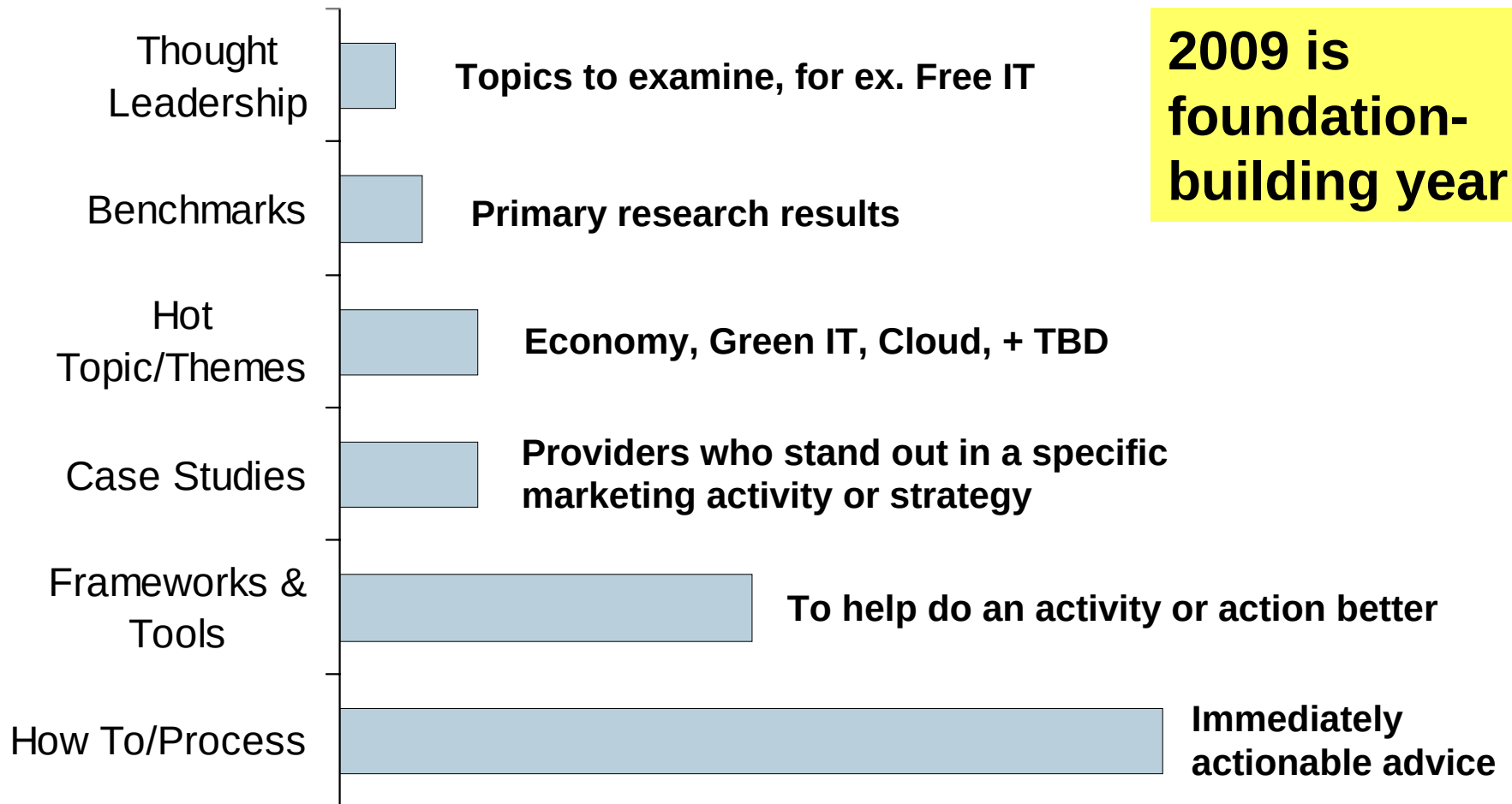
Communicate:

- 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
Industry Markets EMEA



Derry N. Finkeldey
Principal Research Analyst
Industry Markets APAC



Venecia K. Liu
Research Director
Research Area Lead
Media & Communications



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
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- Please send feedback and requests to:
ARCommunity@gartner.com