Analyst Relations Regional Briefing

Santa Clara

August 20, 2014

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Agenda

- 9:00 am - Welcome & “Optimizing Your Relationships With Gartner Analysts”
  - Jeff Golterman, GVP and AR Community Lead
- 10:00 am – AR Program Success at Equinix: An Evolution of Increasing AR Value
  - Jason Starr, Senior Director, Analyst Relations, Equinix
- 10:30 am - New Strategies for Analyst Engagement at HP
  - Chris Wilder, Corporate AR Lead, HP
- 11:00 am - Break
- 11:15 am - MQ, Critical Capabilities & Other Methodological updates
  - Deborah Neitz Dailey, Research Director, Gartner Research
- 12:00 pm - Important Changes to the Copyright and Quote Policy
  - Jeff Snyder, Vice President, Office of the Ombudsman
- 12:15 pm - Peer and Analyst Networking Lunch
  - AR and Peers Network with Gartner Experts and Analysts

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Agenda (ii)

- 1:00 pm Customer References Management Program
  - John Taschek, Vice President of Strategy, Salesforce.com
- 1:30 pm - Analyst Relations Maturity: Successful AR Program Long-Term Growth
  - Peggy O'Neil, Senior Director, Analyst Relations, Informatica
- 2:00 pm - MQ Research Process Optimization Workshop
  - Claire Dessaux, Managing Vice President, Research Content Process, Gartner Research, and Jeff Snyder, VP, Office of the Ombudsman
- 3:15 pm - Break
- 3:30 pm - Advanced AR Strategies: AR program ROI Through Business Relevance
  - Joe Baylock, GVP, Gartner Research, Ken Dulaney, VP & Distinguished Analyst, Gartner Research and Martin Reynolds, Managing VP, Gartner Research
- 4:00 pm - Wrap –up

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Adventures in Analyst Relations

Peggy O'Neill

Informatica

Analyst Relations

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Analyst Relations Maturity Model

	No AR	AR Treated as PR	Erratic AR	Advanced AR	Strategic AR
State of AR	Not a priority	We want analysts to know we exist.	Analysts matter but how much?	Marketing, PR, sales are advocates.	Senior execs get it.
Benefits	Little or none. You don't put in effort, you shouldn't expect any benefit.	Prospects have some level of awareness due to passing mentions. PR may get the occasional reference for media.	Some positive reports with lots of effort. Some sales enablement beginning to occur but still ad hoc. Analysts willing to serve as press references.	Positive reports occur regularly. Analysts are beginning to actively help your company.	Analysts are no longer confined to marketing and sales, they help with product, partners, pricing, support, M&A. Analysts are helping your company in multiple ways.

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Analyst Relations Maturity Model

	No AR	AR Treated as PR	Erratic AR	Advanced AR	Strategic AR
AR staffing	None	PR doing AR, or outsourcing to PR agency.	Small dedicated staff for AR or outsourcing to AR experts.	Investing in mostly product AR.	Investing in product AR, industries AR, regional AR.
Budget items	None	None or tend to PR centric in nature.	A few inquiry seats, limited conference travel, no dedicated AR event.	Research, inquiry, consulting, conference travel, dedicated analyst events.	Budget not just from AR; and dedicated AR measurement, audit, tracking platform.
Interaction types	Limited exchanges driven by reacting to analyst requests.	Email press releases to analysts; briefing requests. Some proactive pushing now.	Beginning to do inquiries, some erratic consulting.	Inquiries and consulting are more frequent; analysts are coming to your annual event regularly.	Can contact analysts without going through channels. Favors are now possible.

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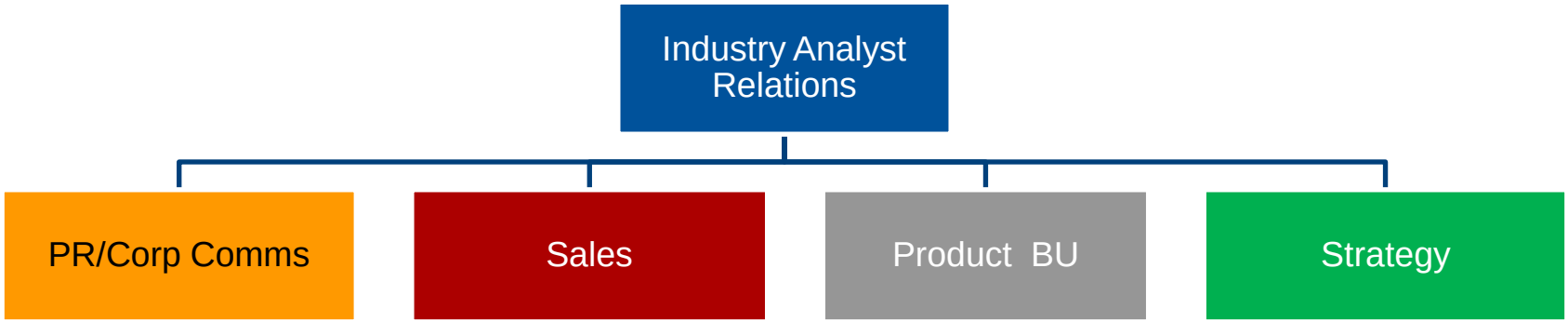
Where Should AR Reside?



Don’t forget about taking care of partners, support, IT, legal, HR, finance orgs too.

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Importance of Hiring

The ideal AR manager can

- Think strategically and execute tactically
- Work long term and short term
- Natural leader but can execute on orders swiftly
- Hard negotiator and peaceful mediator

- Compelling communicator and adroit influencer

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AR as a Profession Is Maturing

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Institute of Industry Analyst Relations

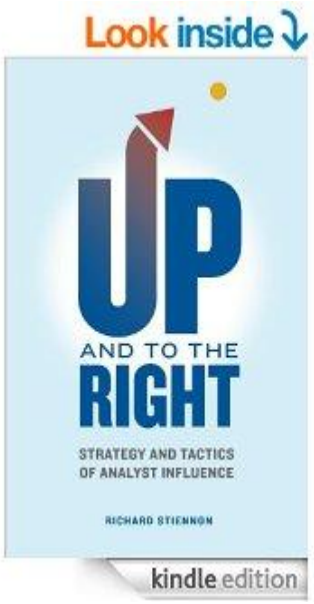
KCG
The Knowledge Capital Group
www.knowledgecap.com

ARInsights

Burson-Marsteller

kea company

HILL KNOWLTON



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Metrics

Principles to keep in mind

- How much $ and time to track?
- What behaviors and outcomes are you trying to encourage?

Common metrics

- Tonality
- Coverage
- Activity
- Sales impact

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Executive Sponsorship

- Start with one if needed but diversify long term
- Figure out how to use your execs – when can they help?
- Cultivate image of objectivity and trust
- Use analysts to improve your company

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