

Gartner Analyst Relations Community

What Gartner Analysts Value in an AR Program

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Our Approach

- Interviewed experienced Gartner Analysts - 12+ yrs avg. experience
- Cross section by segments - software, hardware, services, telecoms as well as diversified
- We asked: “What are the AR skills you find most helpful to get your jobs done as Gartner analysts?”
- Five key areas emerged:
 - Strategies and Tactics for Analyst Communications
 - Knowledge of Gartner Research Process and Methodologies
 - Mindset Toward and Understanding of Gartner Analyst Value
 - Clout With Company Executives and other Thought leaders
 - Professional Approach to Gartner Relationships
- We also asked: “Please rate the relative importance of each of the above areas.”
- We also asked analysts for best and worst-practice examples!

Objective

To help you strengthen your relationships with Gartner analysts!

Analysts Weight Clout and Strategic Mindset as most important

AR Clout is Key to connecting your execs and analysts

“Clout is the most important; AR people who help me get the answers I need with senior executives help to do my job.”

– Gartner Analysts

A Strategic Mindset is essential to effective AR

“Unless an analyst relations person is helping me access the people I need to access and help me manage the information flow that goes both ways, they are just getting in the way.”

- Gartner Analyst

High
↑
Value

We asked Gartner Analysts:
“Which areas of AR effectiveness do you value most?”

1. Clout Within his/her own Company
2. Developing a strategic mind-set toward analyst relationships
3. AR and analyst communications
4. Professionalism in managing analyst relationships
5. Understanding research process and methodology

Foundational Elements

- **Communications**
- **Professionalism**
- **Research Knowledge**

Analysts Value Communications that are tailored, timely, succinct and complete

Analysts Value Timely & Complete Responses

“Just ask me. While this is more work for AR, this is the age of one-to-one communications. When you have something important, I love to see an e-mail with the punch line in the e-mail subject line. Another way to alert me is, with the AR professionals with whom I have a strong working relationship, an IM is appropriate.”

– Gartner Analyst

Crisp, tailored communications Are actually read

“As far as updates are concerned, there is one AR person I work with who creates a tailored newsletter that has just the items I am interested in. It has a set of 2 – 3 headlines right on top, with details below, is very well written and even entertaining. It also comes at odd times instead of same time every week or month.”

- Gartner Analyst

Analysts Place High Value On:

- ✓ AR drives and facilitate meaningful executive and thought leader discussions
- ✓ Gartner-specific briefing sessions for key announcements especially your lead analysts
- ✓ Insure that when you are briefing analysts that you get to your point in first 30 min

Avoid:

- ✗ An outbound communication strategy focused on generic Newsletters, ATC's, webinars
- ✗ Restricting access to executives, thought leaders
- ✗ Letting your lead analysts hear an important announcement from press/others

High Quality Responses During Research Process Are Essential to a Successful Outbound Strategy

Analysts Requests are Client Driven

“The other day, an end user client needed an answer, which required me to reach out to a few vendors. When I contacted the AR function at Vendor A, they basically stonewalled me. I mean they were just like, “We don’t understand why you need this,” whereas I asked Vendor B and Vendor C the same thing and I got an e-mail back, two hours later.”

– Gartner Analyst

AR Can Leverage Tools to Understand Analyst Coverage

“ There’ll be AR folks that don’t know the difference between a consultant and an analyst, or don’t realize that we have different research areas like high tech and end-user. So when AR folks take the time to understand those coverage area differences is obviously pretty primary. And then understanding how an analyst does their job and what’s involved would also be helpful.”

- Gartner Analyst

Analysts Place High Value On:

- ✓ Solid understanding of Gartner Research methodologies
- ✓ That AR has developed its own set-back schedule from publish dates.
- ✓ Complete and on-time info requests
- ✓ Factual corrections, in writing, followed by one call to discuss, should be the focus of vendor review on a research document.
- ✓ Back up your claims with evidence; avoid making claims where you have no evidence.

Avoid:

- ✗ Using the “we need a briefing” as an info request stall tactic, or because its your desired form of communication
- ✗ Inquiry requests to discuss “what you cover” on a frequent basis; handle outside of a briefing
- ✗ Nit picking about commas and dots; editing happens after vendor review.

Professionalism is Mutual and the Basis For Effective AR – Analyst Relationships

Relationships do Matter to Analysts

“Contrary to what many AR folks think, many Gartner analysts do value relationship building. There is nothing wrong with having good relationships with vendor executives and AR, we just may not agree with everything the vendor is doing. It’s important to realize its business and not personal.”

– Gartner Analyst

“ Analysts also see that having a human relationship is more beneficial in the long run. Many analysts get value out of knowing the head of AR for a vendor that he/she covers and picking up the phone and calling because the analyst needs something. Same applies to vendor executives as well.”

- Gartner Analyst

Analysts feel Mutual Respect is Key

“ Analysts and AR people do benefit from a mutually respectful relationship. We have refined our culture over the years to become more respectful and eliminate a lot of the sarcasm and arrogance that used to pop up during the research process. And, by the way if any AR person sees a departure from that can escalate to research management or contact the office of the Ombudsman.”

- Gartner Analyst

A Firm Grasp of Reality Reduces Contention

“ When AR has a firm grasp on the reality of low/no inquiries about them to analysts. Complaining “you don’t write about me” when low/no inquiries is the existing state.”

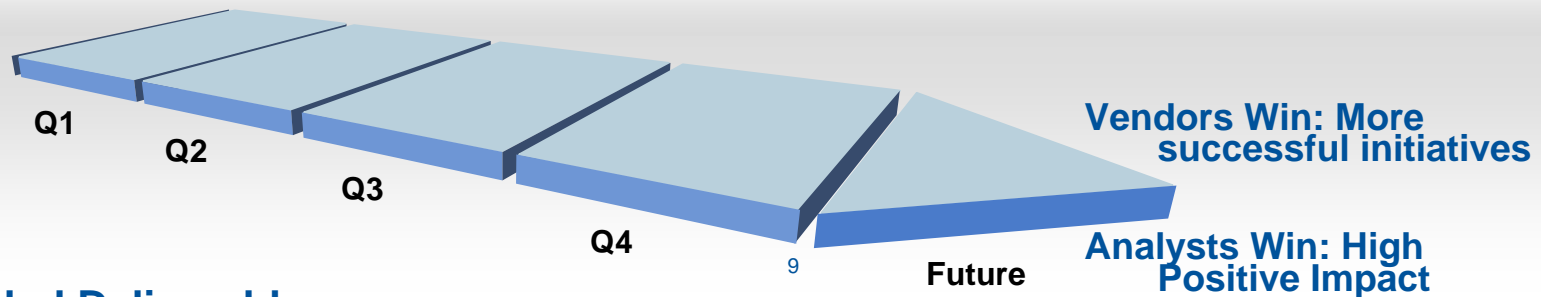
- Gartner Analyst

Link Your Executives With Key Analysts then Set up Engagement Calendar



High Priority Initiatives

- Competitive and Branding Strategy
- Market Opportunities and Threats
- Buyer/Prospect Wants and Needs
- New Product and Service Development
- Campaign Management
- Sales and Channel Effectiveness



Scheduled Deliverables:

- Magic Quadrants
- Market Scopes
- Market Insights
- Cool Vendor Reports
- Hype Cycles
- SWOT's

“ Create an alignment map of Gartner analysts to executives, Identify the “big rocks” – the key initiatives/issues - for each, then build an interaction plan around your initiative milestones, but making sure you are fully aware of analyst publishing calendars as well.

This avoids scrambling by both parties and helps the AR person develop their relationships, executive exposure and analyst engagement management capabilities”

- Gartner Analyst

Gartner

Differentiators


- **Mind-set toward analyst relationships**
- **AR Clout**

Analyst Prefer Vendors to Apply Their Insights to Build a More Successful Business

Low  Strategic Value  High

Industry Analyst

One-Way Access


Analyst  **You**

Vendor Briefings

- Scheduling a vendor briefing (available to any technology and service provider—client or non-client)
- Educating analysts on your company's direction and/or new product announcements via a vendor briefing

Research Provider

Rapid Access


Analyst  **You**

Research services

- 24/7 access to Gartner research, enabling you to make decisions in real time
- Insight you can't get anywhere else on your customers, markets and competitors
- Analytics you can use to gauge the effectiveness of your marketing and sales efforts

Strategic Advisor

Interactive Access

Analyst  **You**

Analyst inquiry and SAS

- A two-way consultative relationship whereby analysts advise you on your go-to-market strategies and growth plans
- Face-to-face strategic sessions with analysts, which you can use to prepare for shareholder meetings, conduct business planning or get feedback on your ideas

Facilitating More Inbound than Outbound Is Key to a Successful Mindset

Actions of vendors that “get it”

- ✓ the AR folks are constantly selling internally on the value of the insight and advice
- ✓ AR is continually working to understand product development cycles and to get the analysts in early – before the code is baked in stone.
- ✓ They are looking at the big picture to bring analyst insights into the organization
- ✓ AR and executives value relationship building with Gartner analysts and applying analyst insights to build a more successful business

Actions of those that don't:

- ✗ AR spends an inordinate amount of time to jump on any and every word, dot or missing marketing message in any interaction.
- ✗ And they're willing to go to the mat for anything regardless of value because if they really see their job is to manage the spin.
- ✗ See only value in hammering us away from anything negative. And attempting to sell us away from a position that may not be flattering.

Clout is an Essential Skill of Effective AR

- Clout is a matter of having established a track record and respect with executives, colleagues and analysts.
- The AR folks with clout are listened to by their executives. And if the AR person says to an executive that you should be listening to this analyst, then the executive will do so.
- Developing clout is hard work. Those who lack clout appear to...
 - Just get in the way
 - Add no value
 - Just fire off responses to analysts when asked for information
 - Blanket analysts with untargeted e-mails
 - Lack problem solving skills to sort out who should be invited to briefings, strategy sessions, etc.

Strategic AR Helps You Build a Better Business

<u>Functional Area</u>	<u>Areas where AR Can Apply Analyst Relationships</u>	<u>ROI Potential</u>
Product Management	<ul style="list-style-type: none"> • Rebalance product portfolio to focus on high margin winners and kill low margin low growth laggards • Re-focus offerings toward installed base of devices/platforms extending customer platform life and decreasing their TCO • Have no/low cost incentives by product line ready to go for customer negotiation. 	
Product Development	<ul style="list-style-type: none"> • Create cost reduction offers through application transformation, outsourcing and off-shoring services. • Deliver offerings that integrate with current IT systems and applications • Build entry level offerings if product line is lacking. 	
Business Development	<ul style="list-style-type: none"> • Seize opportunities to move into new markets by acquiring competitors or partnering for new offerings/services. • Share technology risks with partners to accelerate client adoption. • Continue to expand your presence in emerging growth markets 	



Strategic AR Helps You Build a Better Business

Functional Area	Areas where AR Can Apply Analyst Relationships	ROI Potential
Product Marketing	<ul style="list-style-type: none"> Identify prospects through customer data analysis, and third party lists to drive lead generation for the sales force. Re-direct precious resources into projects that either generate leads, or help a sales person or channel partner close business. Implement campaign messaging around “we can help you cut costs, save money, reduce TCO” or “grow your business”. 	
Pricing and Contracting	<ul style="list-style-type: none"> Expand feature bundling & customer value while keeping avg deal size high Offer flexible delivery terms in exchange for current/higher pricing Extend additional credit / ‘flooring’ – improve lease and finance options 	
Sales & Channel Management	<ul style="list-style-type: none"> Reorganize sales force to focus on higher growth industries or segments Re-train sellers to articulate customer value vs. feature sets. Help sales people in deal pursuit with specific analyst perspectives on competitive conditions and customer segment mindset 	

 **High**
 **Low**

Reporting Structure and Low Executive Vision Can Be Serious Inhibitors to AR Maturity

AR Aligned With Business is More Effective

“ With Vendor A, I find that the AR people are more engrained in the product strategy, so they know about what’s happening. As a result, AR can speak more intelligently about their company and strategy.”

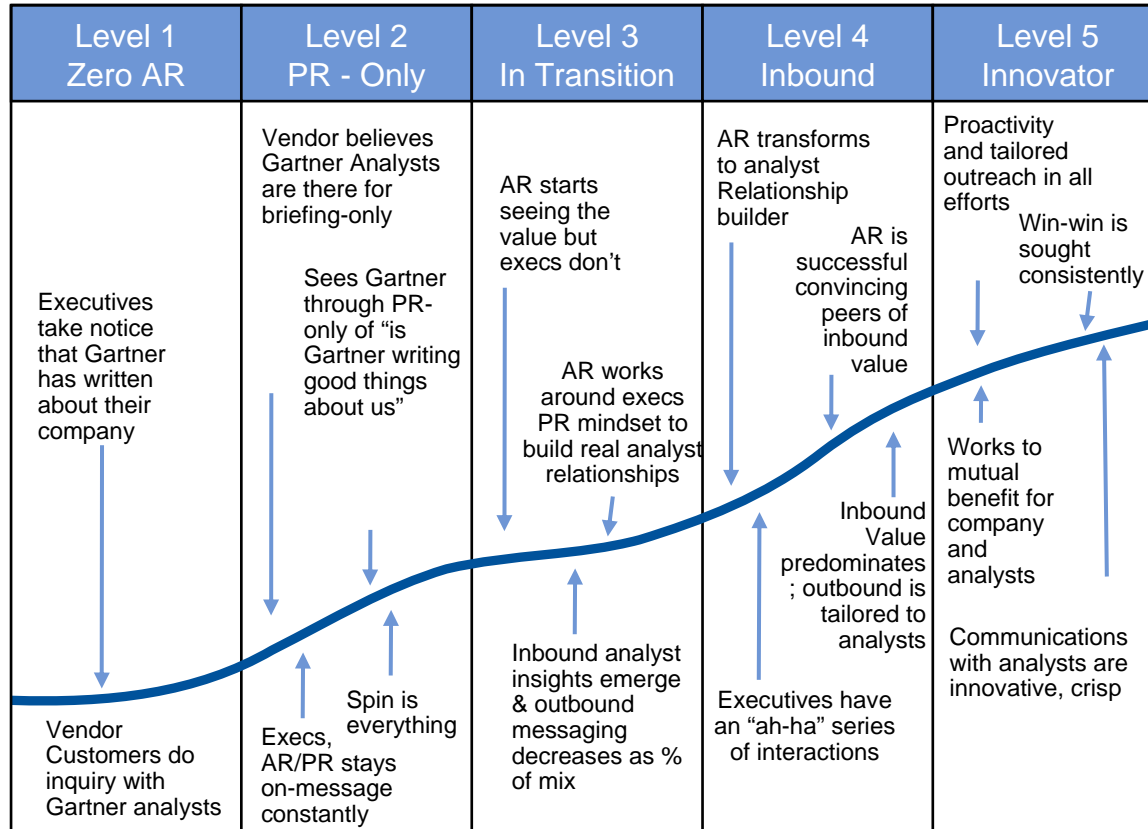
- Gartner Analyst

- **AR today is highly experienced** - most AR professionals have between 5 – 10 years experience.
- So the skill set of the AR people themselves isn’t the variant, it’s the leadership and the kind of goals of the organization they work for that will make or break the success of the AR staff.
- **Lack of Executive Vision** - sometimes causes schizophrenic AR behavior. Some of the most successful AR folks have developed a coping mechanism to build analyst relationships and a way to manage the executive who doesn’t get-it
- **Reporting structure** - there’s AR folks that report into the public relations, corporate communications executives whose sole job is to control the spin on the company – these executives expect same set of outcomes from their AR staff, and are among the least mature in building analyst relationships. They treat analysts like the Press.

AR Aligned With Business Goals Are More Valuable to Analysts

- Those AR professionals who share common goals and objectives with those in the business units are set-up more for success in working with Gartner Analysts

Gartner AR Maturity Model



Analysts Observe

Vendor Mindset

Lack of Awareness

The Analysts Are Not Listening

Strategic AR Might Work

Execs See The Analyst Value

Major Moves Involve Analysts

Summary:

- **Executive Mindset propels maturity**
- **AR Clout and business alignment is bridge-builder**
- **Effective Communications aligned with Research process makes it happen**
- **Professionalism is the glue that keeps contention from pulling relationships apart**

Summary: AR Program Quick Diagnostics

Have You:

- “Tiered” the analysts
- Aligned analysts and key initiative executives
- Established a schedule of analyst engagement (inquiry, briefings, strategy sessions) in support of your key initiatives
- Developed set-back schedules for analyst engagement around key research deliverables like MQ’s
- Reviewed your communication mix – do you have more inbound analyst engagement than outbound?
- Reviewed your communication tactics – are your outbound communications read by the analysts – have you asked them?
- Done a quality review on your responses to information from analysts – are they complete and timely?
- Do you have Gartner briefing and feedback sessions or lump Gartner analyst communications in with all other analyst firms?
- Aligned with the business and established clout among executives
- Developed the mindset of applying Gartner analyst insight to building a more successful business

Top 10 Things You Can Do to Succeed in Analyst Relations (and in Life)

Nancy Erskine
Ombudsman

Gartner®

10. Know your facts

10. Know your facts

9. Reach out early and often

10. Know your facts

9. Reach out early and often

8. Broaden your net

-
10. Know your facts
 9. Reach out early and often
 8. Broaden your net

7. Cultivate references

-
10. Know your facts
 9. Reach out early and often
 8. Broaden your net
 7. Cultivate references

6. Be timely and complete

-
10. Know your facts
 9. Reach out early and often
 8. Broaden your net
 7. Cultivate references
 6. Be timely and complete

5. Know when to escalate

-
10. Know your facts
 9. Reach out early and often
 8. Broaden your net
 7. Cultivate references
 6. Be timely and complete
 5. Know when to escalate

4. Don't ask for non-disclosure agreements

-
10. Know your facts
 9. Reach out early and often
 8. Broaden your net
 7. Cultivate references
 6. Be timely and complete
 5. Know when to escalate
 4. Don't ask for NDAs

3. Keep your cool

-
10. Know your facts
 9. Reach out early and often
 8. Broaden your net
 7. Cultivate references
 6. Be timely and complete
 5. Know when to escalate
 4. Don't ask for NDAs
 3. Keep your cool

2. Be honest

And the #1 way you can
succeed in AR and life is....

-
10. Know your facts
 9. Reach out early and often
 8. Broaden your net
 7. Cultivate references
 6. Be timely and complete
 5. Know when to escalate
 4. Don't ask for NDAs
 3. Keep your cool
 2. Be honest

1. Earn analysts' respect

Resources: Gartner AR Community Resources


http://www.gartner.com/technology/about/analyst_relations.jsp

- “Getting Gartnered” by Matt Goldman
- Learn more about Research Methodologies
- More effective Vendor Briefings
- Research Organization
- Articles on AR by AR Professionals
- Upcoming Research Agendas

Analyst Relations Community

Our Mission
To foster information sharing and best practices with Analyst Relations professionals so clients and non-clients can interact more efficiently and effectively with Gartner.

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Jeff Golterman
GVP, Gartner High-Tech Telecom Programs

Dear Colleague:

The past quarter has been busy at Gartner as we've added new analysts, new high-tech and telecom provider offerings, plus programs and staffing to help you be more effective in your roles as AR professionals.

We look forward to working with you on any questions or issues you have regarding your relationship with Gartner as well as product offering questions or research coverage questions. If you have any questions please contact us!

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WEBINARS	NEWSLETTERS	FORUMS
<ul style="list-style-type: none">7 January 20103 December 200917 September 200921 May 2009	<ul style="list-style-type: none">August 2010May 2010December 2009September 2009June 2009March 2009	<ul style="list-style-type: none">9 November 2010 - Cannes19 October 2010 - Orlando3 November 200920 October 2009

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Resources

- [Vendor Research Issue Escalation Process \(PDF\)](#)
- [Vendor Briefings](#)
- [Gartner Policies](#)
- [Quote Request Information](#)
- [Print Promotion Guide \(PDF\)](#)
- [Vendor Review Guide \(PDF\)](#)
- [Research Organization \(PDF\)](#)
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