



Gartner Peer Insights

Software and service ratings and reviews
written by IT professionals

Maximize the Value of Peer Insights as a Technology Provider



Gartner Peer Insights

Software and service ratings and reviews written by IT professionals

We are excited to announce the public launch of Gartner Peer Insights! You, your colleagues and your customers can now all access the insights and ratings in Gartner Peer Insights.

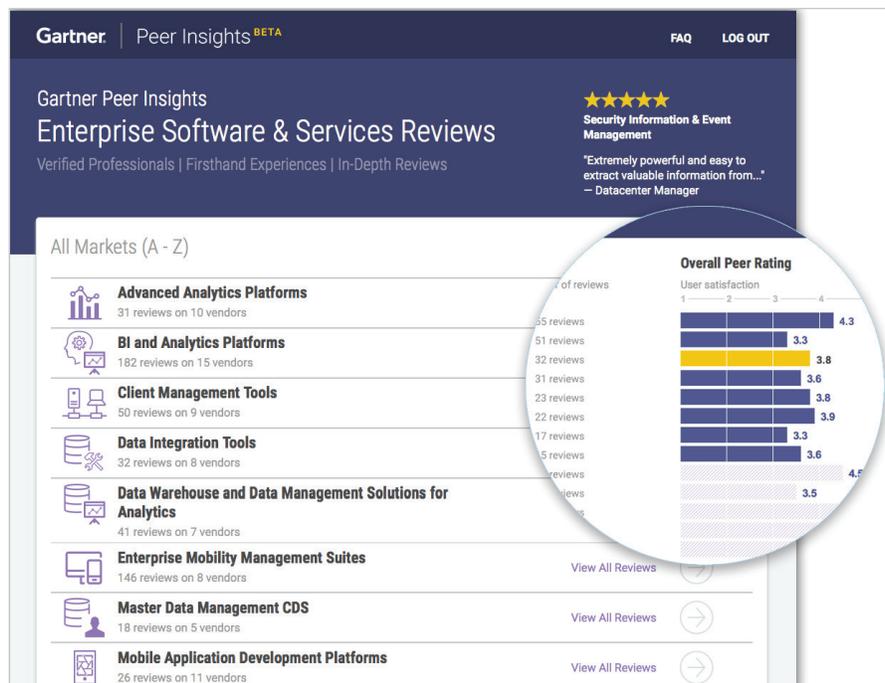
The information in this packet will guide you in understanding how your organization can leverage Gartner Peer Insights from a technology provider perspective.

Contents include:

- I. Overview of Gartner Peer Insights for IT Professionals
- II. Important information for technology providers
- III. Tech Go-to-Market Best Practice: Advocacy Marketing Delivers Value for Tech Providers

Gartner Peer Insights provides a valuable service to the IT community. We appreciate your support!

— The Gartner Peer Insights Team



Gartner Peer Insights for IT Professionals

Software and service ratings and reviews written by IT professionals

Gartner Peer Insights empowers you to make insightful, confident software and service evaluation, purchase and implementation decisions based on firsthand experiences of your peers.

1. Benefit from lessons learned.

Tap into the collective knowledge and experience of peers to get detailed perspectives on every phase of the IT life cycle — from evaluation and implementation to service and support — free of vendor influence.

2. Save valuable time.

Find ratings, reviews and advice on IT solutions — when you need them. **Gartner Peer Insights** ensures that you quickly get thorough, easy-to-consume answers to your critical questions.

3. Move forward with confidence.

Gartner Peer Insights complements the in-depth, unbiased insights provided by Gartner research, such as Magic Quadrants and Critical Capabilities, with firsthand experiences of IT professionals who have already implemented the solutions you are considering.

The screenshot displays the Gartner Peer Insights website interface. At the top, it says "Gartner | Peer Insights BETA" and "LOG OUT". Below this, the main heading is "Gartner Peer Insights Enterprise Software & Services Reviews", with subtext "Verified Professionals | Real World Experiences | In-Depth Reviews". A testimonial from Enterprise Tech Data, Inc. is shown: "Implementation was a breeze but the cost was difficult to sell to upper management." The main content area is titled "All Markets (A - Z)" and lists 11 markets with their respective review counts and vendor counts. Each market entry includes an icon, the market name, the number of reviews and vendors, and a "View All Reviews" link with a right-pointing arrow.

Market	Reviews	Vendors	Action
Market 1	48	9	View All Reviews
Market 2	134	11	View All Reviews
Market 3	300	15	View All Reviews
Market 4	201	8	View All Reviews
Market 5	77	4	View All Reviews
Market 6	84	10	View All Reviews
Market 7	187	15	View All Reviews
Market 8	177	12	View All Reviews
Market 9	221	19	View All Reviews
Market 10	49	8	View All Reviews
Market 11	23	3	View All Reviews

Get started with Gartner Peer Insights today.

Visit gartner.com/peerinsights or contact your Gartner account executive to learn more.

Gartner Peer Insights for IT Professionals

Software and service ratings and reviews written by IT professionals

Gain a candid, comprehensive view of the vendors and products you're considering.

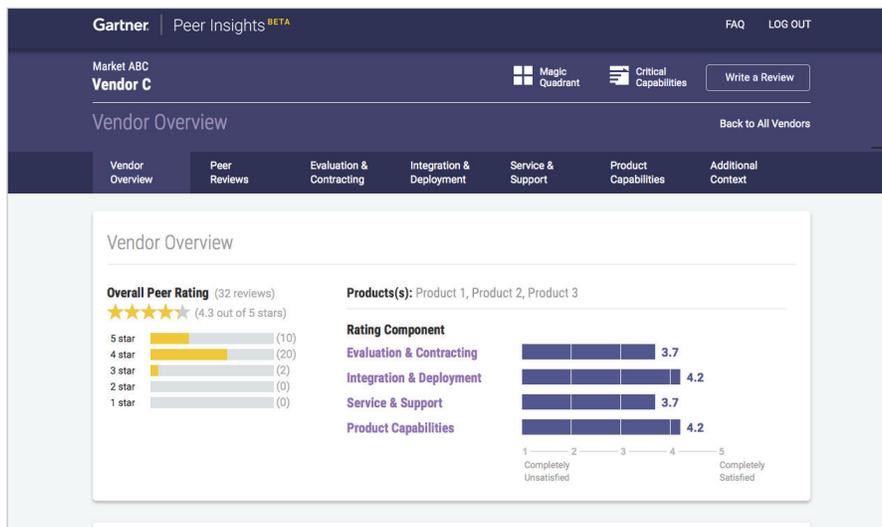
Reviews by Market

View overall ratings within a select market.



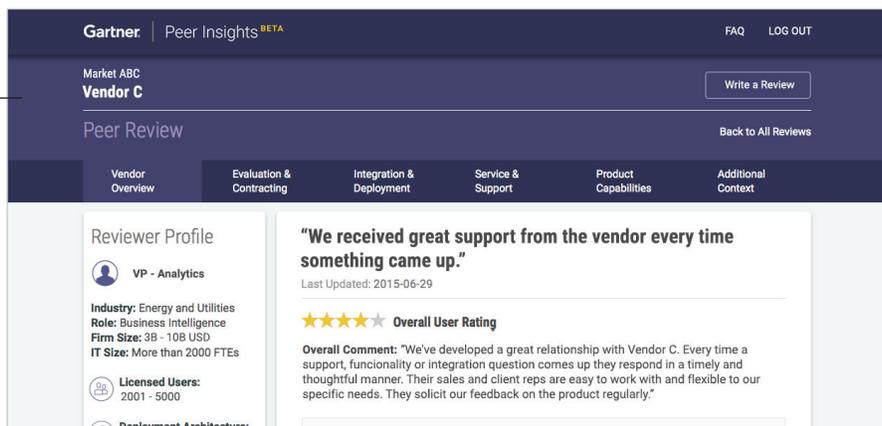
Vendor Product Reviews

Get a complete picture from extensive ratings across the IT life cycle.



User Reviews

Drill down to individual reviews for specific comments and lessons learned.



Get started with Gartner Peer Insights today.

Visit gartner.com/peerinsights or contact your Gartner account executive to learn more.

Gartner Peer Insights for Technology Providers

Software and service ratings and reviews written by IT professionals

Why Gartner Peer Insights matters to you

Your customers' and prospects' decisions are influenced more by the advocacy of a peer than by an outbound marketing message. As a result, they increasingly look to peers and communities for recommendations and advice.

Gartner Peer Insights provides a way for your organization to collect candid customer feedback and for technology decision makers to learn about your products and services.

How your customers can submit reviews

We invite all qualified technology users to submit Gartner Peer Insights reviews. You are free to reach out to your customers and encourage them to submit reviews. Simply direct them to visit gartner.com/peerinsights and click "Write a review." We understand and appreciate the time it takes for customers to write reviews.

Below are some guidelines to help you invite your customers to review your offerings fairly and honestly:

- Invite your customers to submit a review via email, on your website or in your marketing collateral.
- Invite customers who have had direct experience with the selection, implementation and/or service and support of your products or services to submit a review.
- Suggest that your customers submit a review following a transaction or at other logical points in the buying cycle.
- Let customers know they have an opportunity to submit a review early in the buying cycle.
- Thank your customers for providing feedback.
- Publicize improvements or changes you've made as a result of customer feedback.

We don't endorse providing incentives to your customers for submitting reviews. However, if you do decide to offer incentives:

- Ensure your incentive is of nominal value and in keeping with your company's and your customers' policies on gifts. For most individuals and companies, small incentives range from \$5 – \$25, but when in doubt, check with your in-house counsel.
- Offer incentives for all reviews, not just the positive ones. And offer them to all customers, not just the happy ones.

For more information:

FAQ for Technology Providers

gartner.com/reviews/faq/

FAQ for End Users

gartner.com/reviews/faq/

Rules of Engagement

gartner.com/reviews/faq/rules-of-engagement

Or visit

gartner.com/peerinsights

Gartner Peer Insights for Technology Providers

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Information you may want to include when reaching out to your customers:

- A brief overview of Peer Insights. For example: “Gartner Peer Insights empowers technology buyers to make insightful, confident software and service evaluation, purchase and implementation decisions based on the firsthand experiences of their peers.”
- Reviews take approximately 10 minutes to complete and are completely anonymous.
- Gartner’s moderation process ensures that all reviews are authentic and readable, so it can take several business days for a review to be posted once approved.

The reviewer verification process

While reviewers do not need to be Gartner clients to submit a Peer Insights review, they must be qualified IT professionals and will be subject to the validation and approval process described below.

Gartner Peer Insights reviewers are verified through a multistep process, including completion of a profile with their email, job role, title and details about their organization.

For a review to be posted on Peer Insights, the writer must:

- Attest to the authenticity of their review by certifying that (i) they are not an employee, consultant, reseller, direct competitor or in any other way associated with the vendor they are reviewing; and (ii) their feedback is based entirely on their own personal experience with this vendor’s product/service.
- Have an identifiable corporate email address that matches their stated employer.
- Be an IT professional or otherwise involved in technology purchasing.
- Have a confirmed profile on gartner.com or a credible external site (e.g., LinkedIn) that verifies their identity, employer and role.
- Not be employed by a company that has a direct stake in the market or product being reviewed (this includes system integrators and consultants, as well as the company whose product is being reviewed or competitors in that market).

A high volume of high-quality reviews benefits everyone in the IT community

Thank you for your support of Gartner Peer Insights. We welcome your feedback and ideas for future enhancements. Contact us anytime at peerinsights@gartner.com

For more information:

FAQ for Technology Providers

gartner.com/reviews/faq/

FAQ for End Users

gartner.com/reviews/faq/

Rules of Engagement

gartner.com/reviews/faq/rules-of-engagement

Or visit

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Tech Go-to-Market Best Practice: Advocacy Marketing Delivers Value for Tech Providers

Published: 13 July 2015

Analyst(s): Hank Barnes

Empowering customers who love your products to help you with your marketing efforts is a strong growth driver. This research explores nine ways that tech providers are using advocacy marketing to deliver impact results for their organizations.

Key Challenges

Advocacy marketing requires:

- Ongoing identification and management of the advocate community
- A culture shift from permission-based, organizational-level reference activities to direct conversations with individuals who can choose to participate (or not)
- Ongoing effort to maintain engagement with advocates and provide tangible and intangible value to them in return for their advocacy efforts

Recommendations

Technology industry marketing leaders should:

- Systematize "word of mouth" activities (such as referrals) through advocacy marketing
- Use advocates to support content generation and reference activities
- Work social promotion from the outside in, focusing on getting advocates and other influencers to share content, versus pushing it out through their own accounts
- Adopt a "could our advocates help" mentality for everything from product development to recruitment

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Introduction

Modern technology buyers crave information they can trust as they go through their buying process (see "Tech Go-to-Market: Trust Drives the B2B Technology Buying Cycle"). Unfortunately, they don't trust information that comes directly from you, the technology provider, as much as information from other sources — particularly independent influencers (see "Tech Go-to-Market Best Practice: Influencer Engagement Is Critical to Build Buyer Interest and Confidence") and existing customers. As a result, a key focus of technology marketing must be getting others to talk about you.

If your customers love the value that you provide them, then advocacy marketing is a key strategic effort. This research will help tech industry marketing leaders build a case to increase investments in advocacy marketing. Here, we illustrate specific activities that other technology organizations are performing via advocacy marketing, as well as the impact they are experiencing.

Nine Ways Advocacy Marketing Is Working

Gartner interviewed technology organizations about the specifics of their advocacy marketing efforts. The overriding message across all these organizations was clear — ***Any marketing activity that requires, or could benefit from, customer involvement gets significantly easier with advocacy marketing.*** Through the interviews, Gartner identified nine ways that these organizations are using advocacy marketing for high-impact results in two broad areas: connection and creation

(see Figure 1). The examples do not focus on the technology used (see Note 1 for those details) — they focus on the effort and value.

Figure 1. Nine Ways to Get Value From Advocacy Marketing



Source: Gartner (July 2015)

As you optimize your advocacy program, remember that this is not magic. Not every individual in every organization will want to, or be allowed to, participate in every advocate activity. In some cases, organizational policies will be so strict that many externally focused advocacy efforts (such as public references and case studies) cannot be done. But those advocates may be able to participate in less public efforts (such as advisory councils or employee recruitment) or less individually identified efforts (such as group surveys).

Similarly, the best advocacy programs are not highly restrictive in terms of inviting participants — they look to build as large a community as possible and to continue to grow it. As a result, you'll have a wide range of advocates — some may be very cautious about sharing and participating and will do only a few things. Others might join and do nothing. But others will become extremely active. Measuring activities is critical to building a deeper understanding of your program members and to refining the activity options to drive more participation. Segmenting your advocates using tiering and grouping approaches can help you identify where to look for the most impact.

As you look at these examples, remember that you have to give value to get value. Advocates value recognition, privileged access to information and resources, and the ability to engage with others like them. Keep that in mind as you build an advocacy marketing program that generates value for your organization and your advocates.

Analysis

Setting the Context: Advocacy Versus References

Advocacy marketing is a disciplined approach to identifying your customer advocates and engaging them to participate in marketing and related activities (see "Tech Go-to-Market: Best Practices for Advocacy Marketing in Technology Companies"). It systematizes the word-of-mouth marketing approach that many organizations cite as a key early growth driver. Some organizations extend advocacy marketing efforts to include employees and partners, but the focal point must be customers.

Gartner defines a customer advocate as "a customer who is willing to speak and act on behalf of your company without you explicitly asking the customer to do so." The idea of you not having to "explicitly ask" is what sets advocacy marketing apart from traditional reference management.

The typical reference program collects and manages a list of customers who are willing to act as references. It is focused on organizations as references, implying a formality that drives the need for approvals and rules around reference activities. The reference program is typically "owned" by marketing, while customer relationships are "owned" by sales or customer service. This creates friction.

For example, when sales representatives need a reference for an opportunity, they ask the reference manager for help. The reference manager then consults a list of potential references. From there, the reference manager may have to not only explicitly ask the contact at the reference account, but also engage with the sales representative for the account or the customer service manager to make sure that the account is "still happy." If anyone says no, the process starts over. This usually takes some time, frustrating the original requester, who then may go "around the system."

In an advocacy approach, everything changes. The focus is more personal — individuals within organizations. And, while some rules need to be considered, the reduction in formality often reduces the friction in the process. When the sales representative makes the request, the advocacy program manager reaches out to all or a segment of the advocate community, asking advocates directly if they would be willing to take a reference call. The advocates choose if they want to participate or not. If they aren't happy or are too busy, they don't respond.

For organizations with advocacy marketing programs, reference requests are typically resolved in minutes or hours, not days or weeks. They still have reference programs, but often those programs are fed from the advocacy marketing information.

This move from "explicit ask" to "offer and encourage to participate" is at the heart of the nine sources of value.

1. Generate Referrals and References

Generating qualified leads is never easy. A standard practice that is taught in virtually every sales training program is the practice of asking customers for referrals. While that works, it tends to be ad hoc, with the sales representatives often focusing solely on referrals in their territories. Similarly, the

reference process at many providers is cumbersome and slow. Advocacy marketers systematically ask their advocates for referrals and to support reference activities that drive pipeline and revenue.

Example: ReadyTalk has generated more than 190 referrals through its advocate program. One-third of those referrals closed within 60 days — a 50% reduction from the typical sales cycle of more than 120 days. Additionally, ReadyTalk is fulfilling reference requests faster than ever before. In fact, the company now has to significantly segment its advocates to target a specific set of advocates for each request. Why? It was getting too many people volunteering to be references.

2. Facilitate Peer-to-Peer Conversations

Customers want unfettered access to others like them. They value the ability to learn from others, and they like to engage in free-form discussions that help them grow and their organization get more value from a product. Connecting advocates with each other provides an easy way to enable these conversations, whether they occur virtually, over the phone, or face to face.

Example: Ceridian invites its advocates to share business challenges with others, and then to connect on an individual basis. It extends this program out to new prospects, as well. Currently, Ceridian has more than 1,000 advocates and has facilitated more than 750 peer-to-peer conversations. Ceridian estimates that its close rate increases when these peer conversations occur, and it is seeing increased renewal rates for clients that participate in these discussions.

3. Answer Prospect Questions (in Real Time)

When prospects are performing activities in their buying process, time can be of the essence (see "Tech Go-to-Market Best Practice: Mastering Business Moments Is Critical to Technology Provider Growth"). If they have questions that they can't answer immediately, it may delay the process as other priorities take precedence. While having customer representatives available to answer questions can help, using advocates for this can be even more powerful. Customers do not feel like they are being "sold," and instead they can explore details with an advocate whose love for the product often translates to deep, practical knowledge.

Example: Webroot makes advocates available to prospective buyers on its website. As buyers explore Webroot products, they are offered a link (similar to existing chat links to talk to sales or service) to speak to an advocate. (Note: In this case, these advocates are financially compensated — but not for sales results; instead, they are paid for the time they spend and the quality rating of their sessions.) Advocates participate in 120 to 160 chat sessions per day, with a conversion (sales) rate of 20%, which is quite a bit higher than conversion for prospects who do not use the chat capability. The quality rating of the chats averages in the "9s" on a 10-point scale.

4. Convince Prospective Employees to Join Your Company

Recruiting quality employees is challenging in a competitive job market. In an unusual approach, advocacy marketers use advocates to convince job candidates that their company is "hot" and a great place to work.

Example: Influitive used advocates to help convince a potential VP of Sales to join the company. Once Influitive had identified her as the top candidate, it invited advocates to share their experience with her directly. This direct outreach from customers increased her confidence and excitement in the company, accelerating her decision to become part of the team.

5. Create Engagement and Loyalty

While advocates love products, they are busy people. When other priorities arise, they can become less engaged. If this becomes a pattern, their level of advocacy and support will decrease. Advocacy marketers are using creative programs, often including elements of gamification, that are fun and topical to stay top of mind with both current and potential advocates, without being intrusive. The programs can also be used with "freemium" users to maintain their interest and guide them toward the fee-based versions (see "Tech Go-to-Market Toolkit: When Does Freemium Make Strategic Sense in B2B?"). Engagement programs usually drive ancillary benefits around increased advocates, referrals and content generation.

Example: Bomgar developed a program called "The 5 Days of Bomgar," which offered advocates entertaining "challenges" that they could complete and share. In 2014, Bomgar had 282 advocates complete 437 of these challenges, with more than 4,000 activities completed. Beyond the engagement, Bomgar also uncovered 11 new leads, created 12 new video testimonials, and generated a wide variety of content "snippets" that could be used in social media, blogs and other content in that short five-day time frame.

6. Increase User Reviews

In the search for information, buyers value reviews from experts and peers. Whether on Salesforce's AppExchange or an independent site, an authentic customer-generated review can help buyers accelerate their purchase process. Advocacy marketers guide their advocates toward the most impactful review sites and encourage them to share their experiences there.

Example: Blackbaud advocates have created more than 100 reviews on third-party websites. The reviews are one part of its growing program, which also includes referrals and references, which has contributed to an estimated reduction in the length of sales cycles by 20%, while also doubling the pipeline generated from advocate programs.

7. Simplify Customer-Related Content Creation

Only live demonstrations ranked higher than case studies in terms of buyer influence for provider content in our recent survey (see "Tech Go-to-Market: Providers Must Adapt Content and Outbound Sales Strategies to Better Align With Buyer Expectations"). But gaining approval for case studies is always challenging. Furthermore, customer-generated content beyond case studies, such as quotes, opinion polls, videos and other anecdotes, adds validation to other content and programs. Advocacy marketers are generating more customer content much more easily than other organizations, including aggregated content stories that mask the individual details of clients — details that often result in customer stories being blocked in corporate legal and PR departments.

Example: BMC was working on gaining a higher level of certification with one of its partners. The certification would result in substantial discounts on internal licensing costs. Using its advocate community, BMC was able to get 25 customers to submit the required information to the partner in a matter of days. In the past, a similar effort would have taken weeks or months — sometimes never reaching completion because of the friction in the process.

8. Generate Social Buzz

When new products are launched, it is important to get people talking about them. While providers regularly use social media to promote products, they often rely primarily on their own social media accounts to drive the sharing. Advocacy marketers turn this around — inviting their advocates to share stories and dramatically expanding the reach of their messages. This also gives buyers a connection point with peers — a key part of their buying process (see "Tech Go-to-Market: Trust Drives the B2B Technology Buying Cycle").

Example: Hitachi Data Systems created a News Hub to promote the launch of new products. The hub aggregated stories from a variety of sources and contributors, with promotion of the content driven by community members. Hitachi estimates that 82% of the social influence was driven by parties outside the organization. This resulted in a 53% share of voice during a 24-hour launch period, far exceeding competitors.

Example: For large organizations, employee advocacy can have a similar effect. IBM engaged more than 3,000 subject matter experts across the company to drive information sharing. Their efforts resulted in IBM driving more than 930,000 clicks to IBM-related content in the first half of 2015.

9. Contribute to Product Improvement

Advocates love the products they use. But that does not mean they will always be satisfied. Their deep level of passion results in them having a variety of ideas on how to make the product even better and more valuable. Advocacy marketers connect advocates with product management to refine product ideas. Advocates love being part of customer advisory councils, early beta programs and other forums that let their voice be heard by product planners.

Example: Esker engages its advocates in early product design discussions to test ideas and even participate in co-design new features. Rather than build capabilities in a vacuum, the company engages with advocates prior to beta releases. This helps Esker improve decision making. Since it started this program, Esker has seen increased early support of new releases and faster adoption. It has also been able to accelerate the priority of several projects based on advocate feedback.

Gartner Recommended Reading

Some documents may not be available as part of your current Gartner subscription.

"Tech Go-to-Market: Technology Marketers Need to Create Revenue, Not Just Leads"

"How to Manage Customer Experience Metrics"

"When Loyal Customers Become the Advocacy Marketer's Best Friend"

"The Nine Types of Social Applications to Consider for Your CRM Team"

"Customer Experience Is the New Competitive Battlefield"

Evidence

Gartner interviewed advocacy program managers at Blackbaud, BMC, Bomgar, Ceridian, Esker, Hitachi Data Systems, IBM, Influitive, ReadyTalk and Webroot during the first half of 2015.

Note 1 Advocacy Programs

The advocacy programs described in this document are often supported by technology. Esker did not use any specific technology. Webroot supports its real-time chat capability with products from Needle. Hitachi Data Systems and IBM work with Dynamic Signal to support their social sharing/buzz-generation efforts. All the other companies mentioned here use software-as-a-service technology from Influitive to support their advocate programs.

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