

Gartner Analyst Relations Newsletter

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The Gartner Analyst Relations Newsletter is a free e-mail newsletter published on a quarterly basis. It is a tool designed to provide analyst relations professionals with insight and best practices on how to best engage with Gartner for your success.

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Jeff Golterman
GVP, High-Tech &
Telecom Programs

Dear Colleague:

As we move into the second half of 2009 and see positive signs that economic recovery may not be too far off, it's inspiring to note the dogged persistence of many high-tech analyst relations professionals who are working hard to drive the activities that will help return their companies to growth. Charged with doing more with less, and with limited travel budgets, many AR teams are increasing their efforts to bring industry stakeholders—executives, analysts, product managers and marketing—together, strengthening the relationships that foster innovation and growth within their companies.

It is in this spirit that we bring you an interview with [Peggy O'Neill](#), a highly respected member of the AR community. Peggy's experiences in media, IT research, high-tech analyst relations and public relations have shaped her highly credible and unique view of analyst relations. Peggy's insights on building relationships internally as well as with analysts and her perspectives on measuring AR success will be of great interest to both experienced and novice AR professionals.

We wish to thank the 170+ community members who participated in the [Q1 survey](#). Our experienced group of respondents described topics of relevance today, areas of AR best practices and ways to better measure AR success. The survey responses will assist us in implementing a more member-driven agenda within our AR community—something of keen interest to all of you.

[Analyst use of blogs](#) remains a topic of great interest to the community. You may recall our Q1 2009 interview with Peter Sondergaard, SVP Gartner Research, on this subject. In this issue, we provide a quick update on where to find those blogs, who are the top bloggers, a summary of hot topics and how to get value out of current blogs.

Based on your suggestions, we've included information on new, easier ways to get to the Gartner resources that help you do your jobs more efficiently. We've created a new Gartner [analyst relations community](#) Web site you can locate from the home page of [gartner.com](#), which provides quick and easy access to AR Community newsletters, webinar replays and quick links to Research Agendas, requests for vendor briefings, quotes, and other areas that support community members.

This quarter's newsletter also highlights an article from Mike Harris, GVP Gartner Technology & Service Providers research team, on how high-tech providers can further [leverage inquiry](#) with his team to help drive growth.

Additionally, we've added a section to the newsletter called "[James's Corner](#)" in which James Stanton, VP Gartner High-Tech & Telecom Programs product management team, who is responsible for our Analyst Relations portal offering, will update the community on ways to get greater value from features, functions and content of interest to analyst relations professionals. In this issue, James profiles the new Gartner search engine and how it can simplify your access to Gartner content.

We trust you will enjoy this quarter's newsletter and as always, we look forward to your feedback and comments. Wishing you all the best as you navigate a very challenging 2009!



Peggy O'Neill
AR veteran

Analyst Relations An Interview with AR Veteran Peggy O'Neill

Jeff Golterman sat down with AR veteran Peggy O'Neill to talk about the ins and outs of the AR role and how AR professionals can best meet the wide range of tactical and strategic challenges they encounter. Peggy's insights and time-tested advice come from her unique background in communications. An experienced journalist (the Albuquerque Journal and the Los Angeles Times), Peggy became a Dataquest editor and then an analyst at Gartner and Nielsen/Net Ratings. At Oracle she headed up the analyst relations function and revamped the program to better meet the company's needs. Most recently, Peggy headed Hill and Knowlton's U.S. analyst relations practice. She is a board member of the Institute of Industry Analyst Relations and a member of the Association for Analyst Relations Professionals.

We know there are many different reporting-structure models for analyst relations organizations within a vendor organization. Is there a "best place" in the organization for it to be located?

I've never been that religious about reporting structures. I know there are people who are religious about AR not reporting to PR, or having AR very decentralized or centralized. I can see pros and cons for all of them. Hill and Knowlton's structure is more decentralized, while Oracle is centralized. When I was at Oracle, we acquired a lot of companies and I noticed a lot of different organizations and reporting structures for PeopleSoft, Siebel, Hyperion and BEA, and they all had effective AR programs. It doesn't really make a big difference.

I actually would caution people not to spend too much time thinking about it. Just do a good job financing your support, either within your reporting line or outside your reporting line. AR needs political cover and resources. You can do a good job regardless of who you report to. It's still going to come down to your immediate supervisor, whether he or she "gets" AR or they don't, and whether or not you're able to get senior support within your reporting line and outside your reporting line.

What are some of your recommendations for getting the right management support to do your job?

Of course, a lot of it depends on your organization. There's no substitute for really understanding your company's business and priorities. Understanding what AR can bring to the table is an outside view, a broader market and competitive view. Most people within an organization tend to be very internally focused. Realize that successful executives are information junkies and realists. They understand that analysts can provide good intelligence. So as an AR manager, you can be an advocate for how analysts' assets can help make your organization better, which aligns to what senior executives need to worry about, too.

A good AR manager can find rising executives who are realists, who really want to improve their company and can see analysts as another tool in their toolbox to help do that. Those are the managers you want to align yourself with.

What are the best ways to measure the effectiveness of an AR program and individual AR professionals?

It's usually a combination of several metrics. You do have to look at the actual reports and tone of the reports. You should look at activity. Are you getting your fair share of activities out there? Are you interacting with the analysts enough? Because usually, the more you interact with the analysts, assuming your spokespeople are good and your messages are targeted and you've targeted the correct analysts, there's a positive effect, more activity. Positive is gravy. You also have to look at internal constituents—how are they feeling about their interactions with the analysts? Over time, are they getting value from these relationships, or are they just going through the motions? Because if they find over time that they actually are building real relationships, then that's a measure of success, too.

How would an AR manager best leverage agency relationships? Are there unique perspectives the agency would bring to bear to help AR be more successful?

Agencies are able to move very quickly. If, for example, you are just starting a new AR program and have to hire many people, it's going to take you time to find those people, train them and bring them up to speed on what they need to do. An agency can jump in and help you keep the lights on, and even help you look for good people. One of the advantages agencies may have is that they may bring relationships that you don't already have. So an agency is ready to move very quickly, whereas hiring internal people, even doing an internal transfer by just hiring new people in-house, may take some time, especially if the people don't know AR. It also depends on how the agency is managed, regarding direct client contact and day-to-day communication.

What aspects of AR present significant challenges, and how do you overcome them?

Escalations on some reports and dealing with difficult analysts every now and then are negatives. It becomes easier over time because you do build relationships with analysts over the years and you can say, "Hey, remember when we argued about this report two years ago and I predicted this outcome? Well, I was right." So over time, some of the escalations get easier because you do have that foundation, that history, to fall back on. So the only thing you can do to avoid it is try to have a relationship ahead of time and try not to have surprises; be in constant communication with your analyst and with your internal constituents so that everyone can expect that there might be a problem or there might not be a problem. If you can take the surprise out of many things, then it at least brings the tone down. I think in some ways escalations are now easier because the industry, both on the analyst relations side and on the analyst side, has become more professional.

What are some of the unique challenges this current economic climate brings to the AR profession?

I think there's going to be more emphasis on sales and sales support. Companies will be even more sensitive to analysts' impact on deals. So AR professionals should be working with analysts on how not to surprise your sales force. I have a feeling that's where a lot more emphasis will be. Realize too that the analyst firms themselves are under financial pressure, and we've seen layoffs. They're going to be more flexible than they've been previously. So if you're an AR professional, now is the time to ask for more stuff, and lock in some more favorable pricing and terms and conditions with your analyst firms.

Also, because companies are going to be running thinner than ever before, AR professionals will have to be flexible about doing things that might be outside their traditional area, such as more event work and more help for PR. They might have to do more market research because there could be some cuts in the competitive intelligence team. So AR professionals should be flexible team players in all of these related areas.

What are the most important things an AR professional should try to achieve in their first 90 days when taking over an existing AR program?

In the first 90 days, you've done a round of inquiries and phone calls and introduced yourself to all your key analysts, after you've identified and tiered them and gotten their perspective on your company. Hopefully, in this time period, you've reached out to them and you've gone and said hello. You haven't only done an internal analysis and hit a bunch of Web sites.

Then you've also identified all your internal stakeholders, executives and teams who are going to care about what you're working on, people who can help you in your job, and you've made the rounds internally. Hopefully, you've done a staff assessment by that time and figured out which of your staff is worth keeping and which might need improvement. And you've started putting together a plan where you're looking at what the major reports are that you need to worry about, where the major initiatives are that your company has going in the next six months. Are there any new product launches, any new partnerships, maybe momentum that you need to go back to from last year?

Get all those on a calendar and start working backwards on how to plan for each milestone. In 90 days, you probably would be able to count at least one or two high-profile wins, maybe a report that you got someone to write or one or two high-profile, low-hanging-fruit opportunities you can count as a victory.

What trends do you think are important for AR professionals to follow?

Stay on top of the new technologies that help you interact with your analysts, but don't adopt them just because it's the flavor of the month—use them if that's a better way for you to interact with your analysts and your analysts like it. If your analysts are Twittering, you had better get on there and follow them. Some of them prefer e-mail, some of them like blogging, some prefer phone calls. Stay on top of AR industry trends. People talk a lot in the AR profession; there are a lot more support groups, and there's actually an association now, so there are multiple sites you can visit to stay on top of news.

The analyst firms themselves have also been very good in the last two years in reaching out to the AR community. So get to know other AR professionals outside your company, and network professionally.

In some ways, AR has gotten easier than in the past because there's more support for the profession now, more external resources. It's more understood; there are more best practices because the profession has matured over time. And the analysts themselves, I think in some ways, are easier to deal with because they have become more professional, too. And the vendors have become more professional. Overall, AR is becoming more professional, and in that regard, the level of dialogue keeps getting better.

A huge thanks to Peggy for sharing her insights and suggestions. For further discussions, you can contact Peggy at peggyleeoneill@yahoo.com.

Q1 2009 Analyst Relations Survey Results

BY JEFF GOLTERMAN

Our Analyst Relations survey kicked off in early Q1, ran for several weeks and attracted more than 170 respondents. Through the survey, we sought to understand more deeply the wants and needs of the Gartner AR Community, with a focus on ways to improve the value of the community newsletters, webinars and forums. We also sought feedback on Gartner operational areas, with an eye toward making it easier for AR professionals to interact with Gartner—a key element of the Gartner AR Community's mission.

Our respondents were AR professionals and marketing roles with significant AR responsibilities, who work in companies of all sizes, have an average of five-plus years of AR experience and, while working across the globe, were predominantly from four countries: the U.S., the U.K., Germany and Australia.

Overall, survey respondents indicated that building relationships with executives, analysts and internal clients like Sales and Marketing are high priorities. And in support of this most essential AR skill, respondents are highly interested in best practices that enable the strengthening of these relationships.

Respondents further cite the need for updates from Gartner on analysts, the research organization, research agendas and Gartner business processes that affect AR professionals. Respondents made specific and very helpful recommendations concerning research coverage, process, methodologies and information sharing—all of which is vital feedback for various Gartner operations.

You'll see from the detailed survey findings below that we are incorporating survey responses not only into our AR Community agendas but also into Gartner operations. Thanks again for your participation and feedback.

Topics to Be Covered in the AR Community

Those surveyed were asked to rate, in order of importance, a set of broad topics they would like to see covered in the AR Community deliverables. Respondents were asked to rate these topics from 0 to 5, with 5 being of highest interest. Here, we provide those topics listed by high to low rating, and include only those that rated a 3.5 or better:

- Interviews describing how CIOs utilize analysts to make decisions
- Studies that show analyst impact on IT decision making
- Articles on what analysts look for in AR relationships
- Gartner Research agenda changes
- New analyst arrivals and research organizational changes

Respondents were also given the option of writing in other topics that they deemed important; key among those topics were:

- Interviews describing how CMOs utilize analysts
- How Gartner contacts and leverages vendor customer references

Other write-in topics had to do with requests for product and research coverage changes that, while outside the scope of our AR Community deliverables, will be forwarded to appropriate research and product management teams.

The above responses make it clear that AR professionals seek better understanding of how to foster stronger relationships with analysts as well as how IT decision makers and high-tech provider roles utilize analyst expertise. Therefore, we will expand our coverage of these subjects. Knowledge of Gartner changes—analysts, agendas, organizations, processes—are still of high interest so we will continue coverage of these areas as well.

Analyst Relations Best Practices

Within the best practices section of our survey, we saw the following areas rate a 3.5 or higher, again offered here in order of importance:

- Analyst relationship-building strategies
- How AR can help salespeople and channel partners
- AR metrics—how is AR success best measured?
- What constitutes an effective analyst briefing?
- AR and executives—working with the C level
- How does AR best prepare the vendor team for an analyst briefing?
- Issue escalation with analysts and their management
- AR and Marketing—what does Marketing expect from AR?

Other best practice areas that were written in by survey respondents included:

- Beyond metrics, how does AR prove its value?
- Ensuring that customer references are used appropriately
- Templates for planning, reporting, etc.

On the issue of templates: I've been asked by several AR Community members if Gartner could provide templates for various areas that would make it more efficient for AR and analysts to share information. We will work with Gartner Research and Product Development to look at the feasibility of delivering templates per this request. Suggested areas included: vendor briefing presentations; submission of information and references for Magic Quadrants, MarketScopes and Vendor Ratings; and coordinated submissions of information requests for research related to market statistics, forecasts, etc. Providing guidance in this area is consistent with the mission of the Gartner AR Community since streamlined processes where appropriate make analyst and AR processes more efficient.

Measuring AR Success

In general, we see AR professionals utilizing quantitative as well as qualitative measures to track success. Asking respondents to rate a set of measures, those that scored a 3.5 or higher, in order of ranking, were:

- Positive rating changes over time
- Ability to build analyst relationships with senior executives
- (Positive) Tonality
- Volume of published research on my company
- Ability to cultivate adequate customer references

Measures of AR success that were in the "other" category and written in by survey respondents and high in importance were:

- AR impact on sales leads bids and deals
- Leadership positions in published research
- Analyst advocacy toward my company
- Number of analysts covered
- More interactions with tier 1 analysts

In the spirit of helping our AR clients, we will work closely with Gartner Research and Product Development to look at how we can provide the above information within Gartner AR solutions that helps AR professionals better measure their success.

Building A Stronger AR Community

During our fall 2008 AR Forums, many attendees expressed interest in connecting with AR Community members on a more formal basis. They asked if membership contact information could be shared. Our survey polled the membership, and respondents were overwhelmingly in favor of this (89% of respondents answered "Yes" to a question asking "Would you be willing to share

contact information with AR peers?”). We will take the next step to implement such sharing that also provides an opt-in and opt-out feature.

We also asked those surveyed, “If an AR peer networking tool were made available, would you use it for the following?” (5 = very likely, 0 = very unlikely):

- Contact information—3.8
- Information exchange—3.9
- Asking and answering questions—3.8

Given the high interest in expanded sharing of information, we will be looking further into ways to set this up as part of the Gartner AR Community and/or within our offerings used by AR professionals.

Analyst Relations Forums

As many of our community members understand, Gartner decided not to host a face-to-face AR Forum in the spring given its decision not to hold a Spring 2009 Symposium/ITxpo. The survey findings told us that many of you are faced with reductions in travel budget, so utilizing precious days, no matter how professionally beneficial, for a non-client or non-analyst-facing event would be difficult. Therefore, we sought to get your feedback on alternative types of events for the future—whether real or virtual. When asked, “Please rate the following alternatives to holding a face-to-face AR Forum,” the following were respondents’ preferences (1 = most attractive, 3 = least attractive):

- Co-locate with other AR communities—2.2
- Hold a virtual, webcast-based event—1.7
- Cancel event altogether—2.18

Therefore, under the current circumstances of reduced travel budgets, holding shorter virtual events appears to be the most attractive option. We will fold this input into future event planning for AR Forums.

The survey went on to ask for feedback on session topics that will drive our agenda planning for future AR Forums. Topics rated in order of importance were:

- Customers talking on their needs
- Updates on what’s happening at Gartner—Gartner research structure, organization, 2009 priorities, research agenda for next 9 to 12 months
- Networking, analyst involvement, a clear and concise agenda based on issues and topics informed by the community

- How AR can work more closely with Sales to help them win deals in these tough economic times
- AR best practices
- AR Forums used for AR Community and Gartner to plan changes that make it more effective for them to work together
- Hearing analysts talk about best practices in AR and analyst relationships
- How client inquiry calls are changing due to the economy
- Stories from the trenches, and Gartner views on what is happening to AR
- A day in the life of analysts as they work together on a Magic Quadrant or Vendor Rating
- Update on a point of view regarding how AR is addressing blogs and Twitter

Other suggestions that relate to the AR Forums that will be folded into our planning include:

- More insights into Gartner business in the recession
- Making the agenda less overwhelming
- Focusing more on helping me understand Gartner business vs. AR best practices
- Holding forums in the U.K. and Central Europe

Wrap-Up

Your responses will drive both agenda changes and topic coverage for our upcoming AR Community webinars, newsletters and forums. We thank all our survey respondents for the time they took to provide their input and feedback. We also wish to thank many of you with whom we had telephone and face-to-face conversations over the last several months for providing us with your candid and direct verbal feedback as well. We will continue to reference survey results in upcoming webinars and newsletters, as there are additional areas such as quote policies, vendor briefings, research coverage and AR/analyst processes in which we received suggestions for improvement.

Stay tuned for more discussion on these topics in the future!



Peter Sondergaard
SVP, Gartner Research

Update: The Gartner Blog Network

Since its launch in September 2008, the Gartner Blog Network (GBN) has over 80 bloggers who address numerous topic areas. With significant month-to-month growth, GBN activity includes:

- Over 1 million visits per month
- Over 600,000 page views per month
- Over 300,000 RSS feed reads per month

By design, the GBN does not concentrate on a specific topic or set of topics but covers a broad range of IT issues. An analyst's desire to blog is the core motivator for GBN participation.

To learn more about the development of GBN and the role of AR, see our interview, [The Gartner Blog Network](#), with Peter Sondergaard in the March 2009 AR Newsletter. For those community members who visited with us at our AR Forums last fall, you may recall Peter inviting you to join in on the blogs and provide us with your feedback. We'd love to hear from you!

For more information, please visit the Gartner Blog Network at <http://blogs.gartner.com> and the Gartner Blog FAQ at <http://blogs.gartner.com/gartner-blog-network-qa>.

TAGS

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GBN Tags show the wide range of areas mentioned:



Mike Harris
GVP, Gartner Research

AR Question: Do Technology & Service Provider Analysts Take Inquiries?

A client recently asked whether Gartner Technology & Service Provider (TSP) analysts take inquiries. The answer is yes, all Gartner analysts take client inquiries. The scope of the inquiries analysts may take is the same as that of your access to written research. Your entitlement to inquiry is tied to your entitlement to content, not to any particular analyst in any specific research area.

Summary

- TSP analysts absolutely do take client inquiries.
- A quarter of all Gartner inquiries are taken by TSP analysts, and of those, half are from end-user clients.
- If you have inquiry privileges, you are entitled to ask about the written research to which you have access.
- If you don't have access to written research on a topic (such as exclusive content found in Gartner for Business Leaders, Gartner for IT Leaders toolkits or Industry Advisory Services), then you don't have inquiry entitlement to that topic either.

Further Explanation

A large number of Gartner analysts work on the Technology & Service Provider team within Gartner Research. This global team is primarily, but not exclusively, focused on delivering strategic market insight to help technology and service providers grow their business. Analysts in TSP publish content to virtually all research products, including Product Management & Marketing, Core Research, Dataquest, Gartner for IT Leaders, Gartner Invest and many other products. Analysts in this team author and take inquiries on Forecasts, Magic Quadrants, Market Share, Hype Cycles, SWOT Analyses, Vendor Ratings, Market Trends and other research analysis you can use to identify your company's optimal market opportunities.

One client recently asked if Gartner TSP analysts take inquiries. Of course they do! All Gartner analysts take client inquiries. Your entitlement to inquiry is tied to your entitlement to content, not to any particular analyst. For example:

Joe Skorupa is a TSP analyst who focuses on application acceleration and related networking technologies. If you have access to any of the following documents that are among his publications from 2008, you may make inquiries about them.

- You Can't Do Cloud Computing Without the Right Cloud (Network)
- Toolkit Case Study: Boosting SaaS Web Application Performance With AP ADC
- Forecast: Application Acceleration Equipment, Worldwide, 2005 – 2013
- Emerging Technology Analysis: Fibre Channel Over Ethernet, Networking and Communications

If you purchase only Core Research advisor service, you may ask Joe questions about the first document and related issues, but you would not be entitled to ask Joe about the Toolkit Case Study (reserved for IT Leaders clients), the specifics of the Forecast (reserved for Gartner for Business Leaders, Invest, Dataquest and Professional Services clients) or the Emerging Technology Analysis (reserved for Gartner for Business Leaders, Invest and Professional Services clients). Thus, Joe (and every other TSP analyst) is available for all clients with inquiry privileges, but the topic of the inquiry is limited to the content access particular to that client.

Just remember that all Gartner analysts take inquiries, and inquiry entitlement is tied to the written research to which you have access. If you have any additional questions, please contact us at businessleaders@gartner.com.



James Stanton
VP, Gartner High-Tech
& Telecom Programs

James's Corner

A Message From a Gartner Product Manager

In a recent conversation in the hallways of our Stamford campus, I learned from Jeff Golterman that the AR Community has expressed an interest in staying abreast of the changes in Gartner offerings used by AR professionals and their peers.

“You don’t say! A captive audience that wants to learn about our products?”

You can only imagine the smile that spread across my face as I started to think about the biweekly e-mail campaign, replete with free giveaways and pithy headline copy.

“James, this doesn’t mean that they want to be deluged with marketing messages. Our goal is simply to inform the community about changes in features, functions and content available to them and their organization.”

So I promised Jeff to keep my guerilla marketing schemes to a minimum and shelved my plans for a skyscraper ad at the next AR Forum. And in the interest of delivering some immediate benefit, I want to tell you about how to get greater value out of the new search engine found in all the Gartner for Business Leaders offerings, including Analyst Relations, and coming on gartner.com within our July 27 release.

New! Updated Search for Gartner Offerings

Gartner recently made a major investment in our online search capabilities and introduced a new search engine designed to deliver more relevant results. The new search experience allows our seaholders to filter their results by content type, analyst, industry, date or topic. We also now deliver “snippets” from the research article in our search results rather than document summaries, to help users determine the context in which their search term appears in the documents. This update was made across our product portfolio, for both end users and technology providers. This update is in effect today for Gartner for Business Leaders (except Sales Professionals) seaholders and will be in effect for users on gartner.com starting July 27.

As an Analyst Relations professional, be assured you can find an accurate and complete list of all the published research from Gartner that you care about.

Learn More ...

I will also chime in every quarter to highlight new product features and content. This will help existing clients get greater value out of your current Gartner investments. For non-client members of the AR Community, I have set up an online experience that will complement the topics discussed both here in the quarterly newsletter and during the quarterly teleconference. My goal is to share information about other relevant Gartner content that can have an immediate impact on your business.

[Click here](#) to go to the registration page in order to access research such as:

Predicts 2009: Challenges and Opportunities Abound

Meeting the Challenge: The 2009 CIO Agenda

Best Practices for Applying Lean IT