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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In This Issue:

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. Some of the developments you'll learn more about in this issue:

Analyst perception surveys: Many of you work with Gartner to get valuable feedback on your AR effectiveness through analyst perception surveys. Gartner High-Tech & Telecom Programs SVP Michael Yoo reviews 2010 program changes and positive client response.

My Gartner Web experience: Get role-specific insight on how AR professionals can maximize the new My Gartner Web experience from Jim Budkie, VP product management for the Gartner for Analyst Relations offering, and Arthur Villa, product director for the Gartner for Product Management & Marketing offering.

Perspectives on analyst relations: In an introductory interview, new VP Product Management for the Gartner for Analyst Relations offering Jim Budkie shares some key learnings from his AR career at firms such as NCR and Hitachi Consulting.

Getting "Gartner-ed": New and experienced AR professionals alike will benefit from VP Gartner Research Matt Goldman's insights, based on his experience working closely with many AR Community members on optimizing their approach to analyst relations with Gartner analysts.

Leveraging client partners: Your client partner is one resource for all of your Gartner needs and proactively identifying research and entitlements you're not using. Collaborate more effectively using tips from Client Partner Manager Allison Stephens and Client Partner Pearl Reed. Plus, get a real-world perspective on the value a client partner adds to the Gartner relationship from Charlie Zaragoza, group manager of corporate PR at Avanade.

AMR Research and Burton Group integration update: An AR-focused integration update by Gartner GVP of Research Strategy & Operations Jennie Lehman addresses scheduling vendor briefings, Strategic Advisory Sessions (SAS) and client inquiries with our new colleagues. Be sure to familiarize yourself with the "New Burton Arrivals to the Research Team."

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 or feedback, please contact us!

Regards,

Jeff Golterman
Gartner Analyst Relations Community Lead

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Michael Yoo
SVP, Gartner High-Tech
& Telecom Programs

Analyst Survey Policy: Updates and Best Practices

Gartner analysts receive countless requests each year from our technology and service provider clients, asking them to provide their perceptions of a wide range of companies. Our goal is to be responsive to our clients without overwhelming the analyst community with requests that take time away from their primary responsibility: their research. In early 2010, Gartner updated our policy and practices to better manage the way these requests are submitted and processed. The result: a streamlined experience that works well for both the client and Gartner.

Even if you have engaged in the analyst survey process recently, we encourage you to read through the details of the policy below, since it reflects updates and changes made to the process six months ago. We've also included advice and tips about how to get the most out of the survey experience. Please review these and contact us with any questions.

Submitting a Survey Report

Key update: *All requests are now reviewed by the High-Tech & Telecom Programs analyst survey team, not the Office of the Ombudsman. Requests that are sent to the Office of the Ombudsman will be processed more slowly, as they need to be forwarded to the analyst survey request team at analystsurveyrequest@gartner.com.*

Analysts are only required to respond to surveys that have received official approval from the analyst survey team. This ensures that each analyst's full attention is given to client surveys that generate relevant results—and that it is not diluted with "unofficial" surveys that are not fully vetted and therefore won't have trustworthy outcomes.

Our policy continues to be that only clients with inquiry privileges can conduct surveys, and survey results are to be used for internal client purposes only. Companies/individuals that are not Gartner clients are not entitled to analyst surveys.

To submit a survey request, please e-mail analystsurveyrequest@gartner.com the following information:
- Your choice of an online or phone survey
- Complete list of analysts to be surveyed
- Complete list of questions (URL is acceptable)
- How often you plan to conduct this survey
- How you plan to use this information

Online vs. Phone Surveys

You can choose between two types of analyst surveys: online or phone. Online surveys are more popular than phone surveys (approximately 90% of surveys are conducted online).

We ask that your online surveys require no more than 15 minutes to complete, and target a maximum of 25 analysts per survey. Administering online surveys is generally simpler and faster for our clients. Participation in online surveys is subject to the individual analyst's discretion.

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We ask that phone surveys occur within a 30-minute phone conversation, and target a maximum of 10 analysts per survey. We will work with you to schedule these phone surveys in the same way that we do standard analyst inquiry phone calls. As with standard inquiry, these conversations cannot be recorded and only seatholders with inquiry privileges may attend.

For both online and telephone surveys, choosing the right analysts, limiting the number of participants and blocking off the time period are, based on Gartner experience, all designed to get you maximum participation and most helpful responses.

How to Ask the Most Effective Questions

Surveys work best when you engage the analyst on a specific issue close to their area of expertise. We strongly discourage using surveys to ask broad-based questions on the marketplace or on specific research findings. Those questions should be reserved for standard analyst inquiry, which should be scheduled separately.

How to Pick the Target Group

We ask that you target no more than 25 analysts for an online survey (and no more than 10 for a phone survey) because we have found that if you target many more (and many clients want to talk to hundreds of analysts), that the response rate is very low. It's when you are very targeted and focused on the community that you can ask very specific questions, and you're more likely to get reasonable and accurate feedback and good participation rates. It also keeps access equal for all companies, no matter how big or small. Companies may only target an individual analyst once in a 12-month period.

Using Third-Party Providers

A third-party provider can act on your behalf to conduct the survey. About 40% of clients have a third-party organization conduct the survey on their behalf, often because they want the survey to be conducted anonymously. Analysts may feel freer to chat with a third party and say things they might otherwise feel inhibited voicing when speaking to the client directly. Gartner is happy to work with third-party providers to deliver value to the clients with some additional requirements. The survey must adhere to the standard policy for analyst surveys, plus:

- The third party must name the individual Gartner client(s) on whose behalf the survey is being conducted.
- The Gartner client either must have inquiry privileges or purchase inquiry blocks.
- The third party must share a compilation of the raw survey data with Gartner.
- The third party may not reuse or resell the survey information to anyone beyond the original requesting Gartner client(s).

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Administering the Survey

Once we have reviewed and approved your request, you will receive a notice that the survey request has been approved. At that time, you will be copied on the e-mail message that goes to the targeted analysts authorizing their participation in your survey. You can then contact the analysts to start conducting the survey.

- Please keep this e-mail since you may need it later to remind the analyst the survey was approved. The best practice is to include this e-mail in your correspondence with the analyst.
- For phone surveys, an associate from the Gartner client service organization will coordinate the scheduling of phone inquiries.

I hope that this guide will help those of you interested in surveying our analysts. If you have any questions or issues about a survey, please contact us at analystsurveyrequest@gartner.com.

As always, I welcome your feedback; please feel free to write to me at michael.yoo@gartner.com.

Jim Budkie
VP, Product Management
Gartner High-Tech &
Telecom Programs

Arthur Villa,
Product Director,
Gartner High-Tech &
Telecom Programs

Customize and Expedite Key AR Activities With My Gartner

My Gartner, the client Web portal you customize as a personal workspace, helps maximize productivity, increase your knowledge base and extend your reach. Personalizing My Gartner with easy drag-and-drop components lets you align your priorities with the way you work.

My Gartner is an important enhancement for Gartner for Analyst Relations clients. Originally piloted with end-user clients, My Gartner is preferred by 95% of users over all previous Gartner Web experiences.

My Gartner Meets Many Demands

My Gartner meets the full range of AR responsibilities, which vary from one company to another as well as within a given company or business unit. As the duties of your role evolve over time, you can update your My Gartner page to reflect changing needs, in both content and layout.

Configure your My Gartner home page to more easily:

- Establish strategic relationships with the primary analysts who are most influential with key IT buyers in your target markets.
- Understand and prepare for research opportunities that best position your products/services to your buyers.
- Identify and cultivate relationships with other analysts who are collaborating with your primary analysts to anticipate shifts in coverage.
- Know what new topics are important to your buyers, how they are being positioned to your buyers, and which analysts are writing frequently about them.
- Incorporate best practices into how you improve your overall performance as an AR professional.

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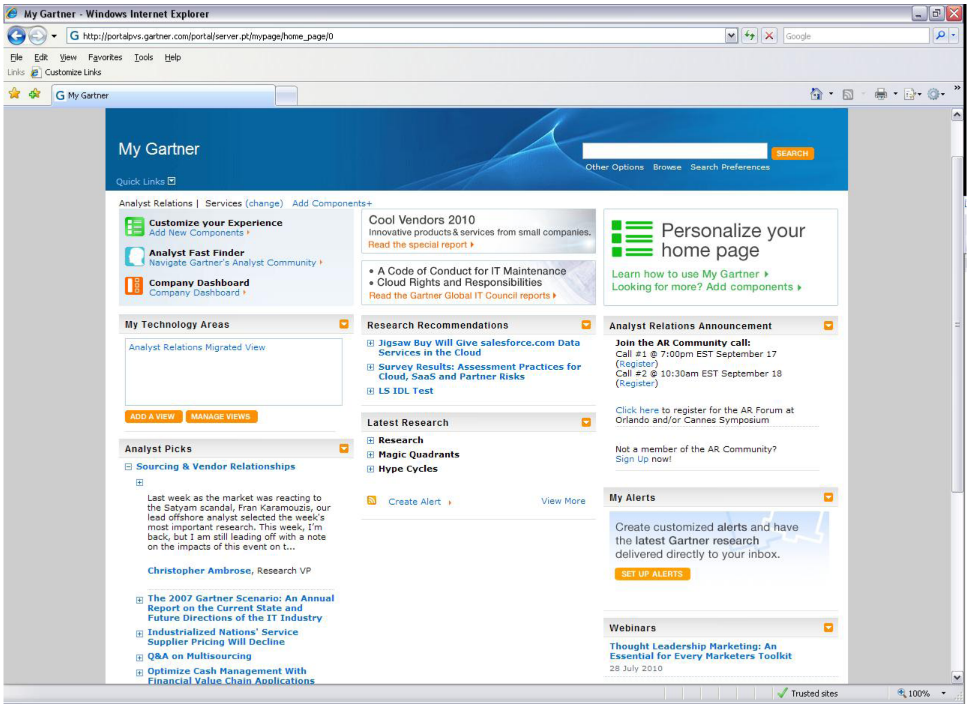
Gain Business Advantage

My Gartner uses an adaptive learning technology to suggest recommended research based on prior readership. You'll receive research recommendations on related topics, geographies and/or vertical industries—plus, you can identify new analysts writing about your areas of interest. The proven principle, "you don't know what you don't know," applies: My Gartner Research Recommendations helps you find the information you didn't know you needed.

Simplify tracking influential analysts and their critical research publications by creating Analyst Alerts—when something new is published, that research will be automatically published to your home page.

Track Gartner research related to the technology areas of your company's products and services via an important My Gartner component: Technology Areas. Create one or more (no limit) custom views into your technology interests—each view presents the latest Gartner research organized in a framework of Customers, Competitors, Markets, and Technologies.

Customize your My Gartner page to better manage your daily responsibilities and more effectively drive key initiatives, choosing tools from a growing library of components.



My Gartner for AR Professionals

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Learn More About Your Customers

Gartner customers are also your customers. IT buyers use Gartner to help make critical decisions about a wide range of technology products and services that affect their business. Extending My Gartner to the Gartner for Analyst Relations offering lets vendor clients see the same research, toolkits and data that IT buyers see. AR professionals now have much greater insight into what's important to their buyers. While to some extent Gartner has offered this before, My Gartner has made such insights more easily accessible.

AR Professionals Who Use Other Gartner Services

Since many AR professionals have additional responsibilities—such as supporting marketing programs, performing competitive research or helping plan new product development and roll-outs—you may also subscribe to Gartner for Product Management & Marketing or Gartner for Market & Competitive Intelligence, both of which now also offer My Gartner. You will be able to customize your My Gartner page to get access to everything you need from each service.

Make My Gartner Work for You

Sign on to My Gartner from Gartner for Analyst Relations or any other Gartner service to get started. Select the introductory promotion in the upper right-hand corner—we've included downloadable tools and instructions to help familiarize you with key My Gartner features.

For questions about getting started or for support, contact your Gartner account executive or e-mail james.budkie@gartner.com. We look forward to hearing your feedback.

Jim Budkie
VP Product Management
Gartner High-Tech &
Telecom Programs

Perspectives on Analyst Relations: A Talk With Jim Budkie, VP Product Management, Gartner

We recently met with Jim Budkie, new VP of product management with Gartner High-Tech & Telecom Programs, to get his perspective on current issues in analyst relations. Jim is responsible for the Gartner for Analyst Relations and Gartner for Sales Professionals offerings as well as the Core Research offering for high-tech providers. An AR veteran, Jim was formerly VP of marketing for Hitachi Consulting and has held a number of product management, marketing and R&D positions with NCR Corp. He began his career as a systems analyst at Procter & Gamble.

Many thanks to Jim for sharing his thoughts with us as he transitions from his role as an AR vendor/Gartner client to his new responsibilities as an AR product manager.

How did you run your AR function?

When I first started, I was just looking at managing the flow of information. People realized it was important to work with the analysts and that they were influencers in the marketplace. But it was a very fuzzy, nebulous concept.

And there wasn't as much written about vendors in terms of the part of the business that we were in. You kept track of providing information to the right set of analysts and staying in touch with them and getting some face time just to stay top of mind. Our success metrics were very soft.

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As I moved into professional services and saw the analysts' research evolve to become more driven by end-user inquiries, it became more reasonable to have a plan for managing our relationships with the analysts who were speaking with our customers and prospects.

We focused on planning ahead, developed a good process for working with analysts, and were very proactive around the service areas where Magic Quadrants were published. We knew this would help to better position us in the marketplace and improve customer and prospect awareness of us as a provider.

In addition to working with the analysts regarding their research, we realized how often analysts were involved in helping end users craft RFPs, determine the list of potential providers, and also how involved they were in helping end users with their short list. This really drives home how important it is, not only that the key analysts are aware of what we provide as a vendor, but also that we keep them up-to-date about our capabilities, our big wins, our best references, etc.

So it's more than just staying top of mind with key analysts. The time you invest in nurturing those relationships helps to build their confidence in you as a provider—their comfort level in recommending that a prospective client consider what you offer.

Promoting Communication Approach communications with an eye on what nuggets of information an analyst is interested in that will contribute to their research agenda.

Market Influencers To be effective as an AR professional is more to bring analyst insights into your company and apply them than to inform or even attempt to influence the analyst.

How did your view of analysts change over the course of your time in AR, and why was that significant?

Over time, I began to consider key analysts as customers. And when I started to think about them as my customers, I had a much more balanced view of the two-way flow of information that had to occur for me to be successful in my job.

I started to look at it from the standpoint of: What is an analyst trying to accomplish? What are they getting out of this? The analyst's role is to be an advisor, a consultant, to be a real subject-matter expert. A lot of how they accomplish that is applying what they've learned from talking to both end users and vendors.

I realized that the analysts needed information that aligned with their research agenda, and was timed with their publishing schedule. To really be a partner in this endeavor, we had to be willing to honor those needs.

One of the challenges was convincing my peers—our internal subject-matter experts—such as a business unit executive to take time away from their business and invest in analyst relationships that may not show a tangible benefit in the short term. I found it very important to find a way to help them make analyst relationship building a priority.

Every survey that I see shows that senior IT executives rank industry analysts very high as an influencer, sometimes even more influential than their own peers. In terms of any type of organization that you can engage with, or any channel of information that you can leverage, far and away, analysts are No. 1. And Gartner is consistently No. 1 among the analyst firms that senior IT executives look to for that kind of expertise and advisory service. When your company's leadership understands this, engaging with the analyst community becomes a higher priority.

How did your company take advantage of analyst inquiries? What are the benefits overall?

The very nature of how a professional services firm engages and works with clients really lends itself to a very heavy use of inquiry. The analysts benefit from inquiry as well. As a result of inquiry, analysts

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The Benefit of Inquiries
Suggest your customers call a Gartner analyst; they will respect your willingness to stand up to the objective outside perspective that Gartner analysts provide.

Longevity and Relationships
Your customers trust analysts who know their technology space and can speak from experience. Build relationships with these analysts and be patient—it takes time.

start learning more about a provider by the kinds of questions we're asking, the context of those questions and the customer problems that we're trying to solve. And so, through inquiry, analysts get a different kind of insight into our day-to-day business than they do in a more formal briefing.

You've been a client of several analyst firms. What are some of the challenges and benefits of working with different firms?

There is a difference in the basic DNA or culture from one analyst firm to another. It's a challenge to figure out how that plays into establishing the relationship and how to get the best value out of it.

Part of that is finding the right chemistry between your subject matter experts and the analyst firm, where there is a very healthy, shared point of view, but also a healthy back-and-forth testing of ideas and concepts. We tend to learn most from this type of relationship as opposed to one-way, briefing-only relationships where the analysts appear to be more interested in absorbing information and not really providing useful feedback or helping us better position ourselves in the marketplace.

How would you describe your interactions with Gartner client partners?

It was interesting to see the client partner role evolve. As new types of products came out on the subscription side and my company went from a seat-based model to the professional services model, the role of my client partner became more important because they were instrumental in helping me and my team track our usage, and understand who our power users were. Even though having those IDs out there didn't cost us anything, it was a bit of an administrative burden in terms of keeping people up-to-date and keeping them in the loop when things changed.

And our client partners were very helpful in aiding the transition to the Gartner for Professional Services offering, and in helping us realize the most value out of this new platform. As a result, we got more out of our relationship with Gartner, and the client partners were a big part of that.

How does the AR professional strategize and plan analyst coverage in alignment with their company's strategic plan (revenue, products and services)?

You need to know two things from your own company's point of view. First, what is your company's strategic plan, and where do you expect to get the majority of your revenue over the next couple of years? And second, what are the emerging areas that are going to be critical to your long-term growth?

The greatest growth may not come from a new product or service. It could be taking an existing offering into a new market, which still means you might have to talk to a different analyst to work a new vertical industry aspect or somebody new who covers a different geography.

Once you know the key areas of focus—offerings and markets—look for where coverage responsibility is held in the analyst firms, and where the majority of written research is being published in your high-interest topic areas. The next step is to align your business leaders with the key covering analysts so they can reap the benefits. That includes getting the analyst's point of view and insights, as well as communicating your company's strengths and successes.

And as you work with the analyst and gain an understanding of how their agenda aligns with your company focus and topic/market areas, it's at that intersection where you should spend all your time.

There will certainly be ad hoc things that need to be dealt with as well. There will be requests to participate in research around something that may not be as strategic. So, you evaluate those point projects, determine if they are worth your effort and that of your subject-matter experts, even

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Staying Focused
Prioritize your key initiatives by revenue growth targets, then know the covering analysts to establish your Tier 1 and Tier 2 analyst groupings.

Spending Your Time Wisely
You can't spend 10 minutes a week across 100 topics. You're better off spending larger blocks of time on your top initiatives. Be prepared to say 'no' to people who outrank you in the organization. When your plan is aligned with the company strategy, your CEO will back it.

if the topics may not be areas where you plan a continuous, relentless, sustained effort to drive information in both directions and build awareness. You're still opening new doors, supporting new relationships and maybe setting a foundation for success in adjacent markets for the future.

How does AR maximize 'face time' with the analyst?

There is a common understanding that 60% of what an analyst knows is not in the written research, so it is wise to pursue analyst discussions whenever possible. For both new and seasoned AR professionals, it's important not to minimize the value of face time.

If you can get to know analysts better by meeting in person, that's also very important. Many companies have regular analyst events. But whether it's face time at these analyst events, or by attending Gartner Summits or Symposium, try to take full advantage of analyst one-on-ones to put a face with a name you already know, or to meet new analysts. You can also work with your client partner to look for opportunities to meet an analyst when they're in your area for meetings or presentations.

What are you looking forward to doing at Gartner in the next year or so?

I'm looking forward to working on the Gartner for Business Leaders products. They're especially designed for professionals in the kinds of roles that I've been in or worked closely with during my career, including analyst relations, product management, sales and marketing.

I'm going to be able to continue to work with the analyst relations community on the provider side, and understand how to enrich the Gartner for Analyst Relations product going forward. I particularly look forward to hearing client perspectives as AR professionals on how we can improve our offerings for your role's success.

I'm also going to pick up back-up responsibility for AMR for Supply Chain Providers, working with Jeff Golterman, who is the primary product manager. I'll pick up primary AMR product responsibility for our vendor clients by early 2011. I have worked closely with AMR Research as a client for almost 10 years, and I'm looking forward to being part of the integration process and expanding the offering.

For comments or questions, please contact Jim Budkie at james.budkie@gartner.com

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Matthew Goldman
Vice President
Gartner Research

Realizing Value
Getting the most value out of Gartner means getting our insights on what's happening in the market, including:
- How competitors are positioned
- What trends are out there
- What buying patterns are clear

Establishing Good Relationships
Relationships are founded in trust, which is earned over time. The more you interact and the more meaningful the interactions are, the stronger the relationship is. You don't have to have a thousand chats to make an impact, but richer conversations tend to stand out.

Effectively Managing Gartner Analyst Relationships: An Interview With Matthew Goldman, Vice President, Gartner Research

We talked with Gartner Research VP Matthew Goldman, who covers the CRM services market, working with AR clients and client partners to make the environment more productive for clients. Matt shared his knowledge and perspective with us on the AR role, how to manage the AR function, and how to work with Gartner to get the most out of the relationship. These topics are addressed in greater detail in Matt's presentation, "How to Optimize Your Relationship With Analyst Firms." We encourage you to review it and keep it for reference.

Many thanks to Matt for sharing his work and insights with us.

How would you describe the interaction between analyst firms and technology providers for someone who is new to the AR function?

The biggest challenge, especially for someone new to AR, is to understand the role of Gartner in the market. We evaluate and share insights about vendors, but we also advise those same vendors. AR must engage with Gartner and leverage the client aspect of their Gartner relationship as opposed to simply focusing on how well they can influence Gartner views and get analysts to regard their company in the best possible light. The biggest mistake in this area is treating Gartner as some sort of mouthpiece to the marketplace.

Ask Gartner about what's happening in your market and understand your position. The easiest thing to do is to ask an analyst: 'What do you think of my company? What do you think of our products? What do you think of our services?' Get an opinion. And begin to formulate a strategy and a direction based on what you observe as the collective understanding of your products or services.

What are some of the key ways in which AR professionals can establish a good working relationship with analysts?

To be effective at getting advice, you have to present your current situation in a fact-based way. You need to be able to share, 'Here's where we are and this is where we intend to go. Give me some feedback—are we on the right path?'

It takes a while for a technology company to get comfortable doing that for fear that 'if I tell you where my problems are, will you then use that against me?' Over time, the more you share, the more you develop trust, and relationships evolve with analysts and executives.

How can the Gartner Research calendar help develop an AR plan?

Whether you inherit a small AR organization with broad impact at Gartner or a larger organization with many moving parts, you can be very effective prioritizing against the Gartner Research calendar.

Remember that active participation allows you to frame the best response possible because you can shine a bright light on what's most important.

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How does the AR staffer optimize their relationship with Gartner?

The AR job is to eliminate surprises, and good planning does just that.

As you establish a relationship with a Gartner analyst, you need to go in with a plan and articulate expectations. The AR professional should know what Gartner thinks about your company, and Gartner should know what your company is doing. We should not surprise one another. You might not like what analysts say about your company, but at least you know the Gartner position, you know what we're publishing and what we're working on. If you're not paying attention and you get surprised, then that's an AR program that doesn't work well.

What are the best ways to set realistic expectations for the analyst and the company?

To set realistic expectations, invest time with the analyst and the coverage areas that your business participates in. So if I cover certain markets and you participate in those markets, you can understand what I'm writing about and what things I'm working on where you might be able to contribute, participate or otherwise be involved.

The formula for this is a little different by analyst or by market coverage area. But being connected to the analysts who write about your company, by communicating in a newsletter, via periodic check-ins, seeing us at a conference or scheduling an inquiry to get an update on changes is important. Set expectations internally and try to set expectations with the analyst. For example: 'We're going to brief you twice a year; is this a good plan for us?'

You also need to manage interactions with the analysts, which means learning how to segment the analyst base by what they cover and what you can expect from them. Analyst segmentation is covered in-depth in the presentation, "How to Optimize Your Relationship With Analyst Firms."

What is the purpose of a vendor briefing? What are the best practices AR can use?

Both clients and non-clients can request and receive a vendor briefing. Depending on the nature of or interest in the topic, one or more analysts may accept the request. Preparation entails understanding and meeting analyst expectations. How long is the time allotted? How many slides should you have? How many analysts should attend?

Best practices for vendor briefings are covered in-depth in the presentation, "How to Optimize Your Relationship With Analyst Firms."

The Client Partner Advantage
Your client partner plays a key role in scheduling meetings with the right analysts as well as following up for additional meetings. That becomes a particularly valuable service for companies that don't have a big AR staff.

Planning With the Gartner Research Calendar

- Since there are too many projects to cover them all, you need to prioritize by date.
- Work backwards from the things that come up first and make those "time-definite" deliverables your priority.
- Your prioritization is determined in part by whatever you actively participate in; the Magic Quadrant or MarketScope processes.

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What is a Client Partner?
At Gartner, the client partner ensures each client receives maximum value from their Gartner experience.

The Communication Advantage
A client partner has their finger on the pulse of what the clients care about.

The Client Partner: Helping Analyst Relations Maximize Gartner Relationship Value

An Interview With Client Partners Allison Stephens and Pearl Reed

How do AR professionals navigate Gartner successfully? How do they get information about analysts and learn more about the marketplace? How are AR requests processed? The Gartner client partner organization is responsible for all of this and more.

Located in Fort Myers, Fla., Egham, U.K. and Singapore, the client partner organization has been a critical part of the Gartner experience for over two years. We sat down with two members of the Gartner client partner team based in Fort Myers, Allison Stephens, client partner manager, and Pearl Reed, client partner, to learn more about how they work with our high-tech analyst relations clients. They shared their insights about how AR professionals can make the best use of client partner services.

Many thanks to Allison and Pearl for sharing their perspectives and experience with us.

Tell us about the role of the client partner. How do client partners interact with and help Gartner clients who are AR professionals?

The client partner mission is to make sure that AR professional clients who are seatholders get the maximum value from their Gartner relationship and from their investment. As client partners, we work with AR professionals over the phone and through e-mail to understand their key initiatives and apply all of their Gartner entitlements to maximize the client-Gartner relationship. For the AR professional in particular, we make sure that they are linked to the right analysts, and have access to entitled research and inquiry that successfully maps back to their initiatives, challenges and priorities.

Each client partner works with specific high-tech providers, and closely collaborates with the Gartner account executives assigned to vendor clients. Since each client partner stays with the same vendor client for some time, we provide consistent value and consistent service.

What are some of the basic dynamics of the analyst relations-client partner working relationship? How do client partners help a high-tech AR professional do their job better?

A critical part of the client partner role is to work with the AR professionals within assigned vendor clients to ensure that they are fully trained and educated about their Gartner services so they can get the most from their Gartner relationship. We work with both AR professionals and their colleagues who have Gartner access to understand their projects and key initiatives and tie together interactions with analysts, the use of Strategic Advisory Sessions (SAS) and vendor briefings, the application of written research, the Gartner Events experience and the use of Gartner media to help them be more successful.

So in addition to what the client partner is doing for that particular analyst relations professional, they're adding value for other seatholders in their organization. And it's a good way to validate or understand the things that the different constituents within an organization are saying. Analyst relations then has the big picture of their own organization as well as how their organization is communicating and requesting information from Gartner.

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The Onboarding Experience
The client partner is part of the client onboarding process and helps clients apply analyst insights to their key initiatives.

AR Assistance From Client Partners

- Mapping their needs to appropriate analysts
- Alerting them to relevant research
- Introducing them to the appropriate analysts for a vendor briefing or inquiry
- Highlighting upcoming conferences
- Sharing news-letters and high-tech webinars available to anyone in their organization

It's also critical to supply AR with the right research. Keeping up with everything in the coverage area is difficult, including ongoing mergers and acquisitions which make for daily reading. Client partners read and organize the research and inform AR of all recent publications, as well as advising when they need to have conversations with the analysts.

Once an AR staffer becomes a Gartner client, what can they expect from the client partner regarding the onboarding process?

The onboarding process is designed to give maximum value to the AR client. The client engagement team completes a Gartner portal training session, including a walk-through of the site, setting up preferences and alerts, and creating examples of successful searches. Those holding an AR seat have a customized portal setup.

All AR clients learn the ins and outs of the AR portal, including the importance of the published companywide research agenda that outlines the upcoming six months of research. This is critical information to help the AR staffer prepare for upcoming Magic Quadrants and other specific research that requires the analyst relations team to brief the appropriate analysts.

As part of onboarding, the client partner understands more about what types of product launches AR is working on with their marketing team, as well as product development and areas where the organization is looking for growth.

For example, we find that many providers are looking at cloud or software as a service for new areas of opportunity, and to drive additional business. Once we understand more about what the client is working on, we make recommendations on research and which analysts to speak to.

What happens after onboarding is completed?

Following training, the client partner's monthly deep-dive calls to AR examines priorities and solutions, and clarifies the focus area.

Sometimes, just making the AR client aware of new content from a competitive intelligence perspective can be crucial.

What role does the client partner play for new and experienced AR staffers?

Analyst relations is a tightknit community, and the AR professionals who have been in the role for some time know the Gartner analysts. But AR professionals who are newer to Gartner, or to the AR role, need to get access to the many analysts who cover their areas, analysts they probably don't know. We help them understand which analysts they should be talking to, and map out the coverage areas.

For new AR professionals, the client partner moves into education mode, which includes making the client aware of the analysts who cover their company and how to take full advantage of Gartner service entitlements. We can also share with the AR contact what research and portal analytics they should be looking at, the alerts that they should set up and the important Gartner events to attend. Follow-up on questions or action items can be quick or can be extensive. Either way, AR clients know their client partner is acting as their liaison to the larger Gartner organization.

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The Client Partner Mission
Our role is to ensure you experience value that far surpasses your investment.

Experienced AR professionals already know their key analysts, but often—given Gartner has 730 analysts worldwide—there are analysts who write about a key market, customer segment, competitor or technology about which even the experienced AR professional is unaware. The client partner keeps the experienced AR staffer up-to-date quarterly, weekly and sometimes daily, with Gartner guidance that pertains to key initiatives. This is why it's important for the client partner to continue to understand what AR has going on in great detail.

Can you give us an example of how a client partner can augment the AR staff?

AR has to manage the message that gets to the analysts, and a major aspect of this is a successful one-on-one with the right analysts for their executives and other key team members. Unfortunately, high-level meetings tend to be last-minute because executives will fly in just for this meeting. So often, it can mean scheduling down to the last seven days prior to an event one-on-one, a briefing or strategy session. The client partner can make sure those sessions are scheduled within a very tight time frame, and this takes the burden off of the AR client.

The client partner role is to provide value. To educate. To understand vendor client key initiatives, and to help you as an AR professional get the most from your Gartner relationship.

Shining the AR Light on the Client Partner: An Interview With Charlie Zaragoza, Group Manager, Corporate Public Relations, Analyst Relations, Avanade

Charlie Zaragoza
Group Manager
Avanade

Veteran AR manager Charlie Zaragoza talked to us about effective ways to work with Gartner client partners and analysts, sharing some critical insights on how to map out an AR strategy. A key professional in industry AR for over 10 years, Charlie is responsible for Avanade's corporate PR and AR strategy and initiatives. He manages the planning and execution of all corporate public relations and analyst relations campaigns including print, online and social media channels as well as the leading analyst houses. He also manages executive communications, including executive speaking, bylines/op-eds and social and traditional media relations. Prior to Avanade, Charlie was the group marketing manager in the information worker product marketing group at Microsoft. He has almost two decades of experience in high-tech strategic and tactical marketing. Charlie can be reached at charlie.zaragoza@avanade.com.

Many thanks to Charlie for sharing his insights and advice with us.

What kind of things does the AR manager need to know to work effectively with Gartner?

In order to be an effective AR manager, you really have to understand what it is you do, how you do it and who you do it with; a solid fundamental understanding of your business. So when you go to your Gartner team and say, here are the areas that are important to my business for this fiscal year, you can actively participate in that conversation.

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The Onboarding Experience
There was a nice partnership between the onboarding team and the client partner team.

I was made to feel that I'm important to Gartner, that I'm valued, and that they want to support me.

The Benefits of Two-Way Communication
It's the exchange of information, and things are a lot easier to find, to see, to bubble up.

Now there is a definite sense of partnership and a mutual understanding, of wanting to get value out of the relationship from both sides.

The Power of Inquiries
Inquiries are a much better way to strengthen and deepen a customer's relationship with Gartner. A mutual exchange of strategic insights, trends and ideas benefits all.

Tell us about the onboarding process. How would you describe the process and what the AR professional can expect?

The onboarding process was intuitive in terms of the portal, how to find information, how to quickly get access to information, etc.—therefore making the website easy to use and not requiring a lot of time looking. The site manager also provided insight as to why you'd want to do this or here's something that you might want to consider doing, and if you do, this is how you will do it.

What's different now about the onboarding process is that Gartner is communicating. Not that the onus was on Gartner, but somebody had to start it, somebody had to do it, and from what I can tell now and have experienced, there's two-way communication.

I am very fortunate that I have scheduled calls with my account team. We have them once a month and they run for 30 minutes. We check in on all levels to see how both sides are doing, and ensure that Avanade is getting value out of the Gartner relationship.

What are some of the ways that you work with the client partner that you find beneficial?

From a research standpoint, I have someone besides myself ensuring I don't miss a report. We're a services company, and touch everything on the Microsoft platform. Keeping tabs on all relevant research is a horrific task. My account team acts as another pair of eyes, making sure that I don't let things slip through the cracks. It's very beneficial and comforting.

While we've always done briefings, we have now shifted our focus to more inquiries. The credit goes to the team for ensuring we're aware of upcoming research, and where it makes sense for us to schedule an inquiry.

In the May 2010 Gartner AR Newsletter, Evan Quinn used the analogy of a dating service, and he's right.

Tell us about your AR team and how client partners fit in.

We're a small, effective team. I'm responsible for corporate and the Americas, which is U.S. and Canada, and I have a counterpart who is responsible for Europe, for pan-European activities, and we're hoping to get somebody for Asia/Pacific. We have a PR agency that has some AR folks who help us as well. I think the fact that we are a small, nimble team, having the current relationship that we now have with our Gartner reps—it makes them part of the team, and that helps a lot.

What advice would you give your peers to maximize their company's AR presence?

The best advice that I could give them would be first, get to know your account team. Second, do not be afraid to engage with your account team. They can only help you as much as you're willing to ask for. They're not mind readers. I would recommend asking questions, and don't be embarrassed, don't have an ego. Check all that at the door. Remember that the account team can only help you with as much as you're willing to bring to the table

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Jenni Lehman
GVP, Gartner Research
Strategy & Operations

AMR Research and Burton Group Integration Update

The research process integration for the AMR Research acquisition is now complete. AMR is fully converted to standard Gartner processes for client inquiries, Client Engagement Days, Strategic Advisory Services and Vendor Briefings. AMR analysts and Research Engagement Services associates have been trained and integrated into Gartner systems.

Burton Group began converting to standard Gartner processes in July for Client Engagement Days, Strategic Advisory Services and Vendor Briefings. They will convert to the standard inquiry process in late August, giving the client research assistants and analysts an opportunity to be fully trained on Gartner systems. Waiting until August ensured that all Burton client data is available in the systems, making the transition smoother for both the analyst and service teams.

New Burton Arrivals to the Research Team

Ken Agress
Research Director
Network & Telecom

Bob Blakley
Research Vice President
Identity & Privacy Strategies

Dan Blum
Research Vice President
Security & Risk Management Strategies

Joseph M. Bugajski
Research Director
Application Platform & Data Management

Larry Cannell
Research Director
Collaboration & Content

Marcus Collins
Research Director
Application Platform & Data Management

Mark Cortner
Research Director
Network & Telecom

Guy Creese
Research Vice President
Collaboration & Content

Paul DeBeasi
Research Vice President
Network & Telecom

Mark Diodati
Research Director
Identity & Privacy Strategies

Michael Disabato
Managing Vice President
Network & Telecom

Ian Glazer
Research Director
Identity & Privacy Strategies

Mike Gotta
Research Vice President
Collaboration & Content

Chris Haddad
Managing Vice President
Applications Platform & Data Management

Trent Henry
Research Vice President
Security & Risk Management Strategies

Chris Howard
Managing Vice President
Executive Advisory Program

Richard Jones
Managing Vice President
Data Center

Gary G. Hein
Group Vice President
IT Professionals

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Kirk Knoernschild
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Application Platform & Data Management

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Joe Maguire
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Elden Nelson
Principal Research Analyst
Executive Advisory Program

Jamie Popkin
Vice President and Distinguished Analyst
IT Professionals

Bill Pray
Principal Research Analyst
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Drue Reeves
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Gene Ruth
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Jack Santos
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Philip S. Schacter
Managing Vice President
Security & Risk Management Strategies

Eric David Siegel
Research Director
Network & Telecom

Nik Simpson
Research Director
Data Center

Jack Stackhouse
Research Director
Network & Telecom

Chris Wolf
Research Vice President
Data Center

Other Analyst Arrivals to the Gartner Research Team

Ray Barger Jr.
Research Director
Supply Chain—Industry & Consumer

Matt Davis
Principal Research Analyst
Supply Chain—Industry & Consumer

Leif Eriksen
Research Director
Supply Chain—Manufacturing & PLM

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