Gartner Analyst Relations Community Webinar

Jeff Golterman, Gartner GVP and Global AR Community Lead

October 13, 2016
Our Gartner AR Community Mission

“To enable each AR Community member to deliver measurable business value back to your company, and make it easier for you to communicate with and build relationships with Gartner analysts.”
Representing Gartner today

Jim Dunlavey - VP
High-Tech & Telecom Portfolio Development

David Black, VP
Methodologies & Content Architecture

Claire Dessaux - MVP
Research Content Planning & Delivery
Important Updates for you and your company

- Gartner Peer Insights update and reminder about the new tools for technology providers
- Magic Quadrant Reference Survey Optimization Update
- Research Process Optimization Update
Gartner Peer Insights

Ratings and reviews of enterprise technology solutions *by* end-user professionals *for* end-user professionals

- More than 5,500 reviews published in 94+ markets and on 800+ technology solutions
- 106+ markets open for reviews, with 30 more coming in 2016
- Reviews cover the entire technology lifecycle (evaluation, implementation, service & support)
- Makes Gartner the must-have source for technology buyers, providing a full spectrum perspective from analyst-led research and advice such as Magic Quadrants to the peer perspective in Gartner Peer Insights
- Open to public since October 2015
Gartner Peer Insights
Continued acceleration and adoption

Traffic and review count is up >7x since public launch in October 2015

Key growth drivers for this substantial increase include:

• Expanded market coverage
• Organic growth through public search engines
• Vendor engagement and campaign drives
• Events programs (both Gartner and Vendors)
Who’s reading Peer Insights reviews?
83% from organizations with > $50M revenue and public sector

Top 10 job roles of IT users:
- Enterprise Architect
- Infrastructure & Ops
- CIO
- Applications
- Security & Risk Mgt
- Data & Analytics
- CMO
- CEO
- Sourcing and Vendor Relationships
- Other CxO

Based on available data as of Oct 3, 2016; Users are not yet required to enter all demographic info
Gartner Peer Insights

Continue to expand End User awareness

Peer Insights continues to become an integral part of the My Gartner client user experience and decision process.
Gartner Peer Insights
Review Campaign resources – Technology Provider Tools

Monitor overall Review activity across all Markets or filtered to specific Products and/or Markets

Leverage custom “Write a Review” links, pre-configured for the correct Product and Market for the Reviewer

• Enables targeted campaigns for each of your Products or Services

Create custom “Reader Reviews” links, directing Readers to existing Reviews on specific Products.

• Highlight End User perspective through digital marketing, social media, websites, and more!
Magic Quadrant Reference Survey Optimization Overview and Update
Magic Quadrant reference survey enhancements

- Continued optimization of Magic Quadrant reference survey process
- Exploit synergies between MQ Reference & Peer Insights surveys:
  - Common survey experience
  - Transparency of survey questions and responses post-Magic Quadrant publication
  - Visibility into the voice of customer sentiment
  - Ease of converting references to reviews
  - Consistency of questioning for improved data gathering and analysis
Integrated MQ reference and Peer Insights survey and process

- Combine Magic Quadrant Reference and Peer Insights questions into one survey
- All reference survey responses are delivered to the MQ authors as usual
- Respondents can opt-in to share their review comments and ratings on Peer Insights
- Confidential Magic Quadrant Reference survey answers are never published on Peer Insights
MQRS markets have generated >450 reviews in pilots

Results of 8 MQRS-Peer Insights pilots (vs. corresponding 2015 surveys)

Survey length
- 2015: 20
- 2016 pilots: 26
- Completion rate: 81% (2015) vs. 80% (2016)
- Satisfaction score: 4.0 (2015) vs. 4.0 (2016 pilots)

Opt-in rate for Peer Insights (%)

- EMMS: 100%
- SFA: 100%
- DCIM: 91%
- ORM: 100%
- WC: 94%
- SACBT: 95%
- STA: 100%
- NPMD: 100%

596 total surveys in 8 pilot markets (all ratings for PI)
461 (88%) opt-in to share full review
<table>
<thead>
<tr>
<th>Technology Providers</th>
<th>Gartner /Technology Provider Clients</th>
<th>Gartner Analysts</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Greater visibility in the reference process and in the survey questions</td>
<td>• Representative perspectives from large volume of reviews from high-value users</td>
<td>• Continuous flow of end-user insights for high-quality fact-base</td>
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<tr>
<td>• Optimized use of customer references by leveraging the same contacts for multiple</td>
<td>• Enhanced value in Research documents resulting from the integration of Gartner content and users’</td>
<td>• Optimized and consistent reference process across all MQs/CCs with no surprises for technology providers</td>
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<td>initiatives toward expanded market presence and increased revenues</td>
<td>feedback for more informed decision making</td>
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Timeline for transition

**Plan for 2H 2016**
- Transitioning a portion of MQs to the new process:
  - Heads-up in vendor welcome packet
  - Heads-up to all references of the process including FAQs about Peer Insights
  - Aligned survey questions
  - Use new in-house survey delivery and tracking platform
- All other MQs will continue to use existing process (check the Publication Calendar on gartner.com for details)

**Plan for 2017**
- All MQs requiring customer references will use the new process
- Any telephone reference/interview-based surveys will require an online survey too
## MQ Reference/Peer Insights Surveys

Transition MQs for Q32016/Q42016  \( n=16 \)  Subject to change

<table>
<thead>
<tr>
<th>Magic Quadrant</th>
<th>Pub Date</th>
<th>Peer Insights Market Status</th>
<th>Lead Analyst</th>
<th>Coordinator/PM</th>
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<tbody>
<tr>
<td>Advanced Distribution Management Systems</td>
<td>17-Mar</td>
<td>Active</td>
<td>Rhodes, Randy</td>
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<td>Application Release Automation (ARA)</td>
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<td>Application Security Testing</td>
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<td>Business Continuity Management Planning Software, WW</td>
<td>17-Jul</td>
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<td>Witty, Roberta J.</td>
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<td>Enterprise Data Loss Prevention</td>
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<td>17-May</td>
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<td><a href="mailto:michelle.vanpelt@gartner.com">michelle.vanpelt@gartner.com</a></td>
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<td>Identity Governance &amp; Administration</td>
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<td>17-Aug</td>
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<td>IT Risk Management Software</td>
<td>17-May</td>
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<td>Managed Security Services, WW</td>
<td>16-Dec</td>
<td>Planned</td>
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<td><a href="mailto:nicole.papadopoulos@gartner.com">nicole.papadopoulos@gartner.com</a></td>
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<td>17-Jun</td>
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<td>17-Jun</td>
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<td><a href="mailto:tranace.peebles@gartner.com">tranace.peebles@gartner.com</a></td>
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Call to Action for Technology Providers

- Create awareness with your references about Peer Insights and their ability to opt-in to share their anonymized responses as a review.

- Customer reference survey process changes should have minimal impact to you as technology provider:
  - Continue to submit your list of customer reference contacts in the same spreadsheet and work with the MQ project manager.
  - Share the FAQs on the process with your reference customers.
  - We will notify you when the survey opens and closes.
  - You will receive weekly status updates with the list of customer references who responded/did not respond to the survey.

- Direct any questions to methodologies@gartner.com.
Research Process Reminders
## Timeline (1/2)

<table>
<thead>
<tr>
<th>Step</th>
<th>When</th>
<th>Who</th>
<th>Recommendations/Comments</th>
</tr>
</thead>
</table>
| Welcome Packet Communication| • By the end of the kick-off month as specified in the Publication Calendar on gartner.com (at the very latest)  
• Three weeks before the first request for information | Gartner            | • Read the Welcome Packet carefully  
• Take the time to study the MQ timeline specified in the Welcome Packet very carefully  
• Flag right away any anticipated conflicts with customer events, product launches, etc. that would prevent you from working with us at the requested timeframe |
| Vendor Survey Communication | • Three weeks after Welcome Packet communication                     | Gartner            | • Contact MQ Project Manager with any clarifying questions on the survey                                          |
| Vendor Survey Responses     | • Three weeks after reception of the survey for medium-size surveys   | Participating vendors | • Be as succinct but precise as possible  
• Focus on information that differentiates your product/solution  
• Refer to facts whenever possible  
• Add links for more information                                                                 |

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# Timeline (2/2)

<table>
<thead>
<tr>
<th>Step</th>
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<th>Recommendations</th>
</tr>
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<tr>
<td>Request for customer reference contacts</td>
<td>• Three weeks after Welcome Packet communication</td>
<td>Gartner</td>
<td>• Focus on providing contacts that match the requested profiles</td>
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<td></td>
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<td></td>
<td>• Use the FAQ to promote Peer Insight to customer references</td>
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<tr>
<td>List of Customer Reference Contacts</td>
<td>• Three weeks after request</td>
<td>Participating vendors</td>
<td>• Ensure data quality in the submission spreadsheet</td>
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<tr>
<td>External Factual Review</td>
<td>• Five business days from reception of the vendor write-up + MQ graphic</td>
<td>Participating vendors</td>
<td>• Focus on correcting inaccurate facts</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>• Use links to provide evidence</td>
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<td></td>
<td></td>
<td></td>
<td>• Do not rewrite the text</td>
</tr>
<tr>
<td>Courtesy copy communication</td>
<td>• Upon publication of the MQ document</td>
<td>Gartner</td>
<td>• Sent to participating vendors</td>
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</table>
Summary and next steps

- **Gartner Peer Insights momentum and tools for technology providers**
  - Peer Insights has momentum, campaign to capture reviews from your clients and use the new tools to track and monitor your review sets

- **MQ Customer Reference Survey Process and Peer Insights Alignment**
  - Transition throughout 2016 before applying to all MQ customer reference surveys in 2017 – make sure your references know they can submit reviews

- **Research Process Reminders**
  - Understand the expected timelines and flag concerns right away to Project Manager, then to Lead Author's Team Manager

Contacts for questions and assistance:
- Peer Insights: Peerinsights@gartner.com
- Methodologies: Methodologies@gartner.com
- Research Process: optimized_delivery@gartner.com

www.gartner.com/peerinsights
Wrap Up

- We’ll post our charts from today’s Webinar to the AR Community Site: http://www.gartner.com/technology/about/analyst-relations.jsp

- For those of you that have registered for the AR Forum in Orlando and Barcelona, we’ll see you there!

- For those who would like to register, please e-mail us at ARCommunity@Gartner.com

Thank You!