

Optimizing Your Relationships With Gartner Analysts

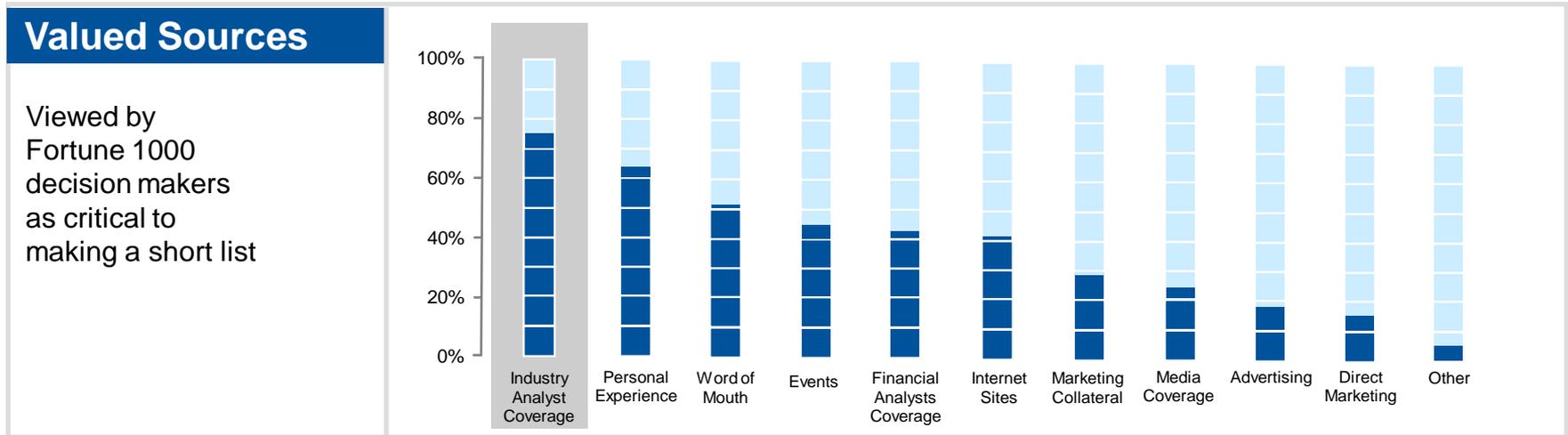
Symposium Tutorial

J. Golterman
GVP, Gartner Inc.
October, 2011

Discussion Topics

- **Analyst Influence**
- **Strategic AR**
- **Prioritizing Analysts**
- **Executive and Analyst Linkage**
- **The Research Process**
- **Realistic Expectations**
- **AR Program Diagnostics**
- **Gartner Resources for AR**
- **Q & A**

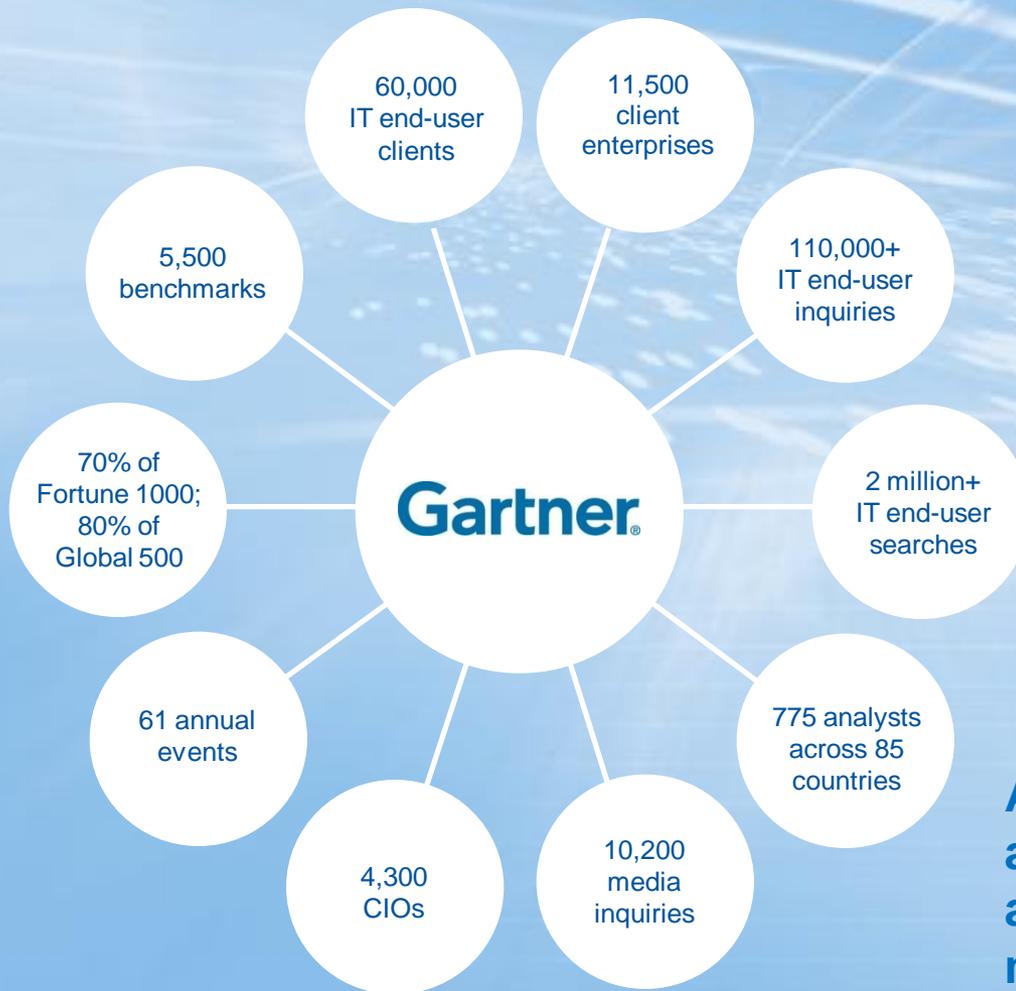
Analysts Influence A Large Portion of the ~\$3.5 trillion in Global IT Spend



According to Hill & Knowlton Survey of IT Decision Makers

- > 50% of IT Decision makers surveyed say Industry analyst information is the most important information used when short-listing IT providers
- Nearly 2/3 of IT Decision Makers subscribe to IT Industry analyst research
- IT managers see Gartner as the most credible IT Research provider, and >50% of those surveyed, are subscribers to Gartner

Gartner Clients Engage In Many Ways



- **A verbal consultation** with IT Industry analyst most influences an IT decision makers short listing of potential providers
- **A published analyst report** also most influences the creation of a short list of providers

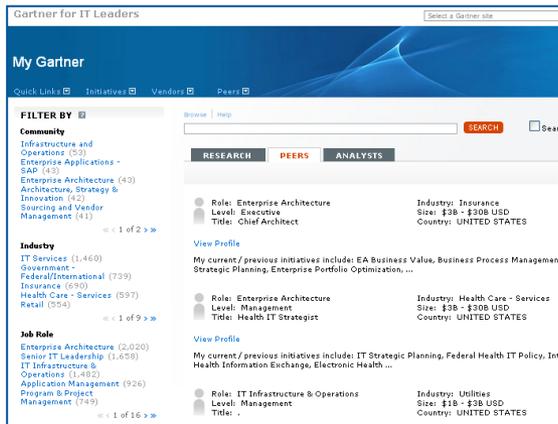
- Hill & Knowlton Study on IT decision making

Actions: AR must continually adapt to understand the new analyst and IT buyer interaction models.

Written Research is Not Just Magic Quadrants Anymore!

“Published Analyst Reports” Take Many Forms at Gartner

- IT End Users perform over 2 million searches on gartner.com
- IT Buyers now use interactive frameworks and decision tools
- MQ’s, Market scopes, Vendor ratings are still prevalent, but clients also use Market Clocks, IT Score models and “Roles” research to support their decision making
- End-users are reading Research written for Vendors too! (e.g. SWOT’s, Market Snapshots, Market Statistics)



Action: Stay abreast of the new content types from Gartner and learn how IT buyer decisions made using these new content types will affect your company.

IT Buyers Interact With Analysts in Many Forms beyond Inquiry



While the 30 min inquiry is most prevalent:

- IT Buyers attend analyst presentations and meet one on one with analysts during Gartner Events worldwide
- CIO's in particular rely on Gartner CIO Research
- Gartner "IT Professionals" analysts now spend time on site with clients understanding IT implementation issues during their research process



Actions: IT buyers consume Gartner analyst advice via many interaction channels; AR is well advised to stay abreast of inquiry trends and listen to analyst presentations in order to gain a complete picture

Understanding How Analysts Do Their Jobs is Essential to AR Success



What Analysts Value in an AR Professional:

- *Strategic Approach*
- *Executive Clout*
- *Strong Communications*
- *Professionalism*
- *Strong Research Knowledge*

The Analyst's Job:

- *Offer technology advice to end-user organizations*
- *Advise technology companies*
- *Provide a sounding board to venture capitalists and other investment companies*

The AR Opportunity:

- To leverage Gartner Analyst insights to build a stronger business
- Show your company's best face to key market influencers
- Keep your company fresh and relevant in the analysts' mind

The Strategic AR Mindset - Striving to Build Trust Based Analyst Relationships

Low Strategic Value High

Maximum Value



Actions: Assess your own approach; if your strategy is "Outbound, PR-Only", develop an action plan to encompass "Inbound" elements as well. Track your interactions with analysts, if Inbound = 2X Outbound, your mix is healthy.

Inbound AR is more successful when you bring analysts in early

Initiative Areas

Benefits of Engaging Analysts

Market Opportunities
and Corp Biz Dev

- Identify future growth opportunities
- Leverage strengths, and determine threats

New Product/Service
Development

- Competitively Differentiate offerings
- Bring offerings to market quickly and at right time

Product
Management

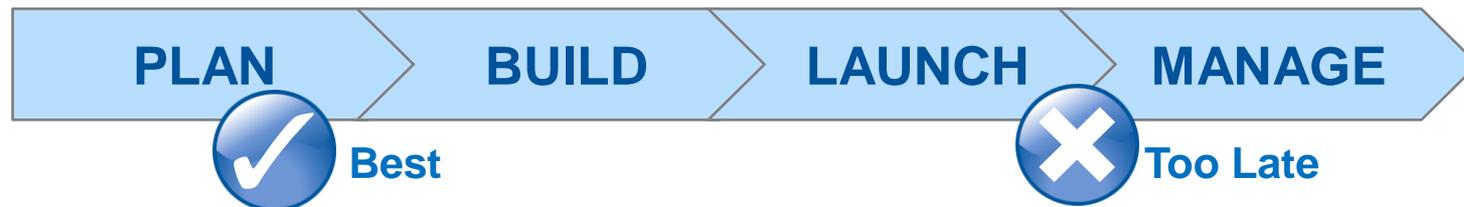
- Rebalance product portfolio to focus on high margin winners
- Understand Customer wants & Needs and measure market traction

Campaign
Management

- Target high growth segments with right message
- Generate more leads and close more business

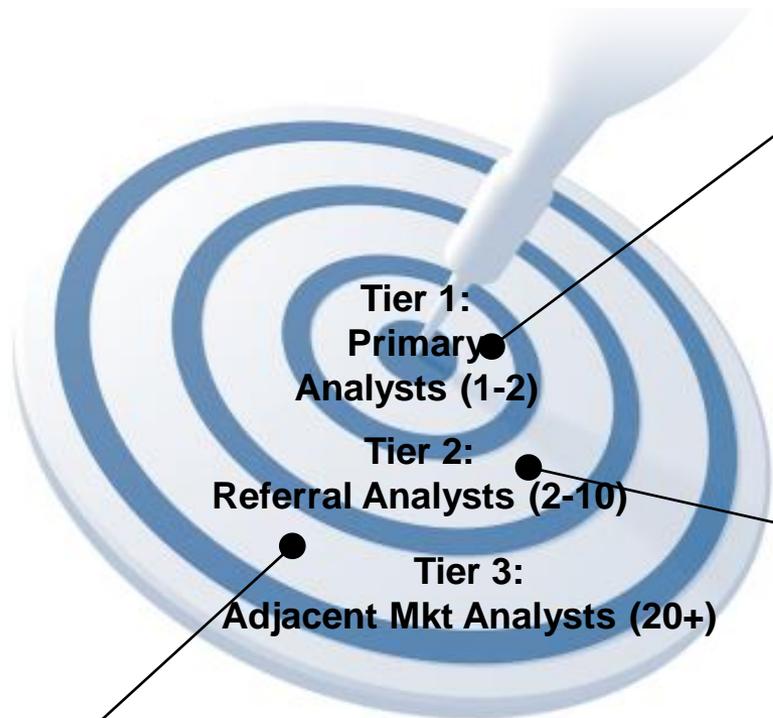
Sales and Channel
Effectiveness

- Increase sales and channel knowledge
- Reduce sales cycles and improve win ratios



Actions: Evaluate *when* you engage analysts in your initiative launch cycle. The probability of positive analyst evaluation increases when they've helped shape the offerings/strategy.

Establish A Tiered Approach to the Analysts



Your “lead analyst”

- **Who?** analyst who knows you best, advises target buyers, covers your primary market
- **Objective?** Eliminate surprises, understand what they think, learn from their perspective. They know what you are doing, understand your strategy
- **Engagement:** Link with your Executives and Thought Leaders, Read what they publish, know what they plan to publish, Regular inquiry, Quarterly briefing, Strategy session

The markets in which you currently compete

- **Who?** The analyst who has conversations with clients where you may/should be mentioned
- **Objective?** Awareness - They know who you are and when to mention you. You know which conversations the analyst has that include you
- **Engagement:** Annual update briefings, Occasional inquiry

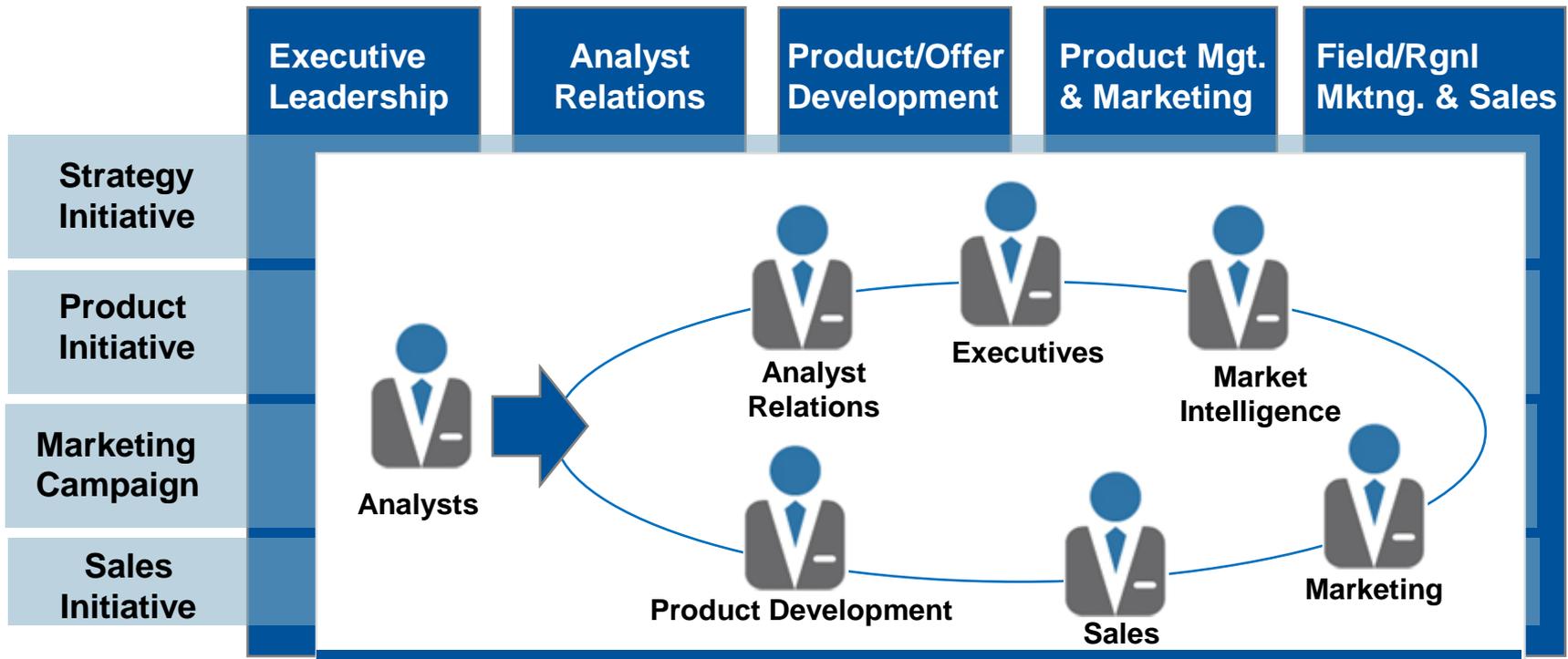
The market(s) in which you want to compete

- **Who?** Analysts covering upstream, downstream and adjacent markets.
- **Objective?** Innovate and anticipate
- **Engagement:** Inquiry as often as required, targeted Newsletters or e-mails

Actions: Prioritize which analysts you will focus your efforts on and which ones will be a lower priority.

Link Analysts With Key Initiative Executives And Their teams; AR Clout is A Key Skill

“Clout is the most important (element of AR skills); AR people who help me get the answers I need with senior executives help to do my job.”
– Gartner Analyst



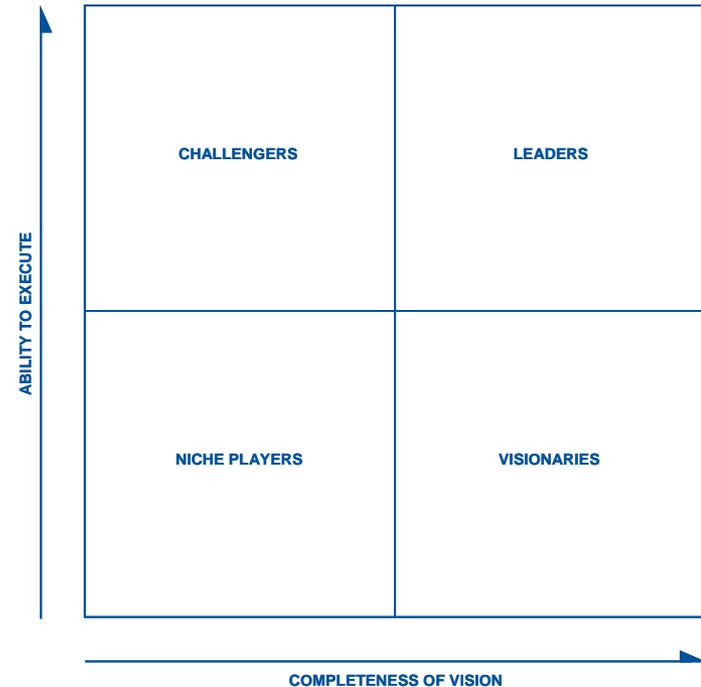
Actions: Identify the key initiatives, sponsoring executives and team-member thought leaders. Align analysts accordingly then build an interaction plan around your initiative milestones

Learn Gartner Research Methodologies, Evaluations Criteria and Research Process

Analysts Place High Value On:

- Solid understanding of Gartner Research methodologies
- Complete and on-time info requests
- Factual corrections, in writing, followed by one call to discuss, should be the focus of vendor review on a research document.
- Back up your claims with evidence; avoid making claims where you have no evidence.

Action: See the Gartner AR Community page, Methodologies link and learn how you will be evaluated in each of the vendor-mentioned/analyzed methodologies.



Pay Special Attention to:

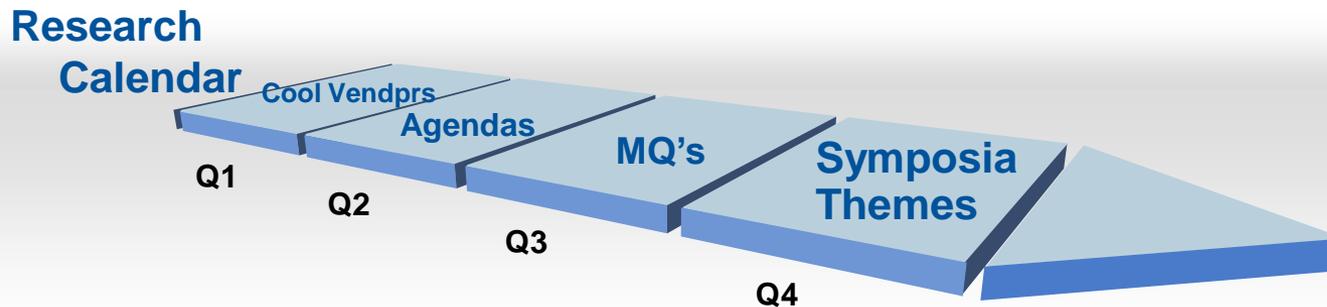
- Magic Quadrants & Market Scopes
- Market Insights
- Cool Vendor Reports
- Hype Cycles
- SWOT's
- Market Clocks
- Strategic Vendors

Stay Aware of Research Publish Dates

“ Make sure you are fully aware of analyst publishing calendars and create a set-back schedule from publish dates back through your work plan.

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

- Gartner Analyst



Actions: Develop set-back schedules from research publish dates and develop analyst, executive & team interaction plans. Give yourself ample time for product development cycles to fix gaps, customer reference gathering, vendor/analyst briefing set-up time, and time to accommodate busy executive calendars.

Use Vendor Briefings Wisely

Timing is Key

- The objective of a vendor briefing is to provide answers to these questions for analysts:
 - *What client need do you best fit?*
 - *Where is your “sweet spot”?*
 - *Whom are you targeting?*
 - *Not targeting?*
 - *What makes you different?*
- VBs contribute to an analyst's overall impression of your organization — simple steps can help you improve the desired impact.
- Hold Gartner-specific briefing sessions for key announcements especially with your lead Tier 1 analysts
- “Analyst Days” – Should you choose to have one, insure you hold separate Gartner feedback session with senior executives and thought leaders



Vendor Briefing “Art”

“Brief Half As Much As You Seek Input”

Vendor Briefing Best Practices:

- Be consistent and top of mind
 - Present more than annual updates on your business
 - Include VBs as part of your product release schedule
- Focus on a key objective
 - Narrowcast your message; narrow the audience
 - Speeds scheduling and improves efficacy of the briefing
 - Fit into an analyst’s agenda – changing customer requirements, emerging market trends, competitive shifts, cool new technologies (ie target “Cool Vendors” special report)
- Be concise
 - Focus; less is more - Maximum 20 SPH (slides per hour)
 - Build in time for questions

If You Are an “Advisory” Client, Utilize Inquiry

- Less than 30% of what an analyst knows ever gets published.
- Telephone inquiries are the primary channel for two-way interaction.
- A two-way relationship enables clients to engage analysts on key market issues, trends or observations, **before** an expensive launch.
- When used effectively, inquiries are an excellent way to obtain deeper insight, apply published research to your situation, and learn more about an analyst's views.

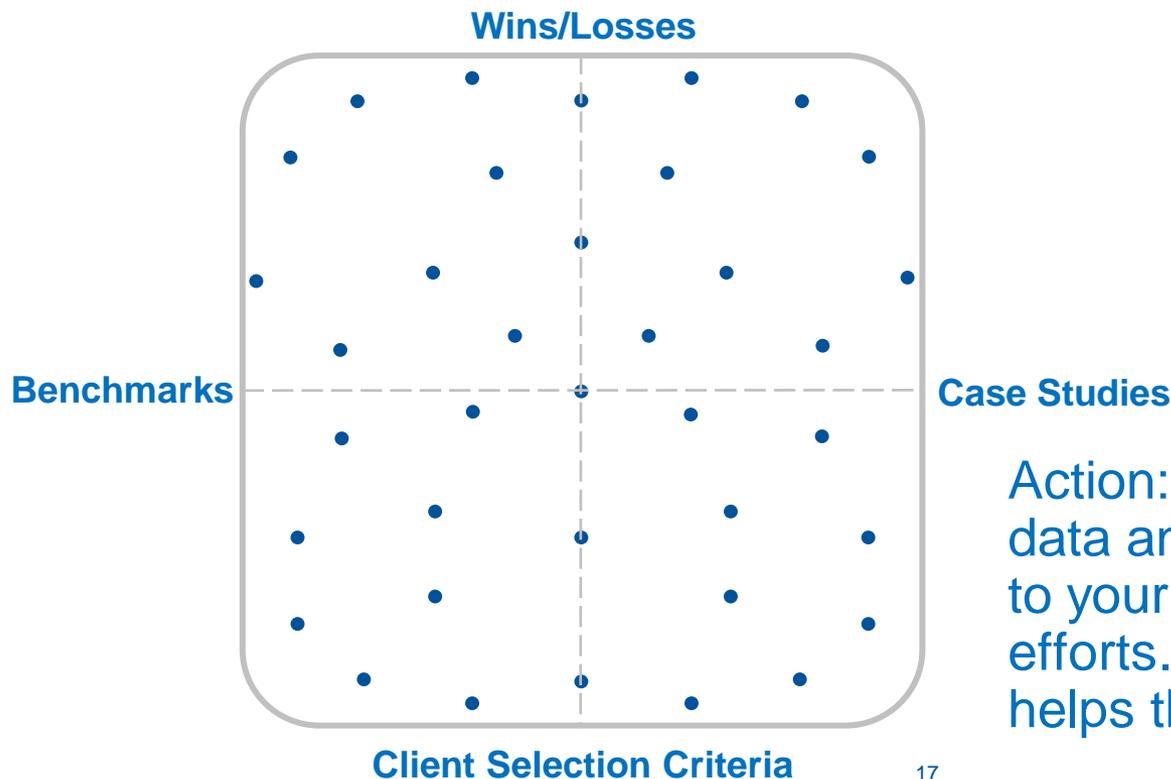


Action: Use inquiry often and with your executives and stakeholders.
Avoid “batching up” questions, issues, into vendor briefings or analyst days – keep those focused.

Provide analyst with insights that align with their research agendas

“To keep me updated on important topics, there is one AR person I work with who creates a tailored newsletter. It has just the items I am interested in, & a set of 2 – 3 headlines right on top. I can read details below, is very well written and even entertaining, and also comes at odd times instead of same time every week or month.”

- Gartner Analyst



Action: Analysts thrive on new data and information. Add value to your tier 1 analysts research efforts. Provide credible data that helps them do their jobs.

Have Realistic Expectations About Analyst Coverage of Your Company

Analysts influence IT Buyers, but CIOs, CFOs, Line of business managers and consumers decide.

- We reflect what we hear from end-users far more than what you tell us in a briefing. Delight your clients – their testimonials weigh more heavily than your marketing.

“AR often requires a firm grasp on the reality that analysts may get low/no inquiries about them. Complaining “you don’t write about me” when low/no inquiries is the existing state, is not fruitful.”

- Gartner Analyst

If analysts pan your product/service then either:

- We don't get it. Action: Help us. Give us briefings, demos and references.
- We get it and think you don't. We will help you find the right message and the right audience for your solution because we think your current pitch is off-target. Action: Be realistic.

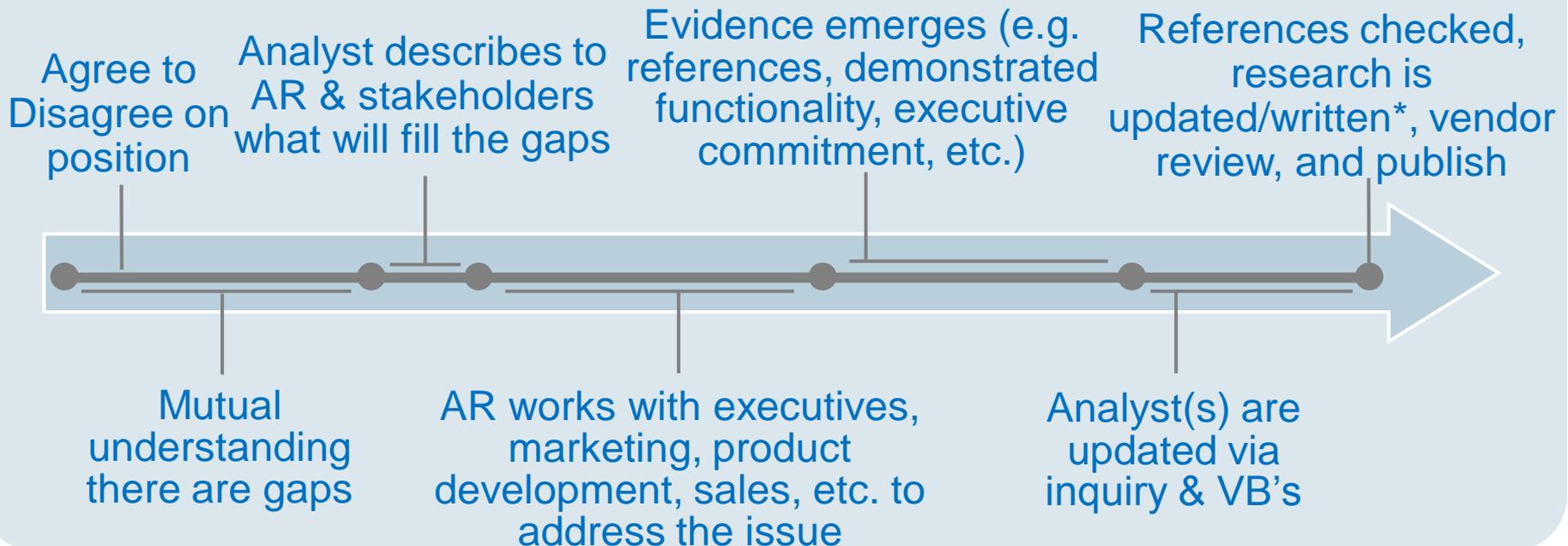
Research Positions Can Change

Providing Analysts See the Evidence!

Analysts need evidence and data points in order to determine if ratings and/or positions should change

- AR and their management and colleagues will benefit by understanding that its more than “Just telling the analysts how great we are!” The great news is there is an informal process!

Research Position Update Process



* 100% Analyst Discretion; the above is not an official policy of Gartner Research

Case Study: Always Be Gathering Customer References

Reference Philosophy

- References are our #1 Priority
- References are nurtured over time
- Relationships with our customers span **all** departments and employees
- We listen and we execute

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Top 10 Practices

1. Build and evolve executive relationships
2. Maintain frequent communication with as many customer employees as possible
3. Employ metrics to ensure customers are successful
4. Make sure that successful customers are part of every person's success plan
5. Integrate survey data into CRM system
6. Don't react to a request for references
7. Educate references on Gartner's goals
8. Encourage reference spokespersons to be absolutely fair and objective
9. Build references that can accomplish specific goals.
10. Read the Gartner reports. Know the analysts!

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Professionalism is Mutual

The Basis For Effective AR – Analyst Relationships

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

– Gartner Analyst

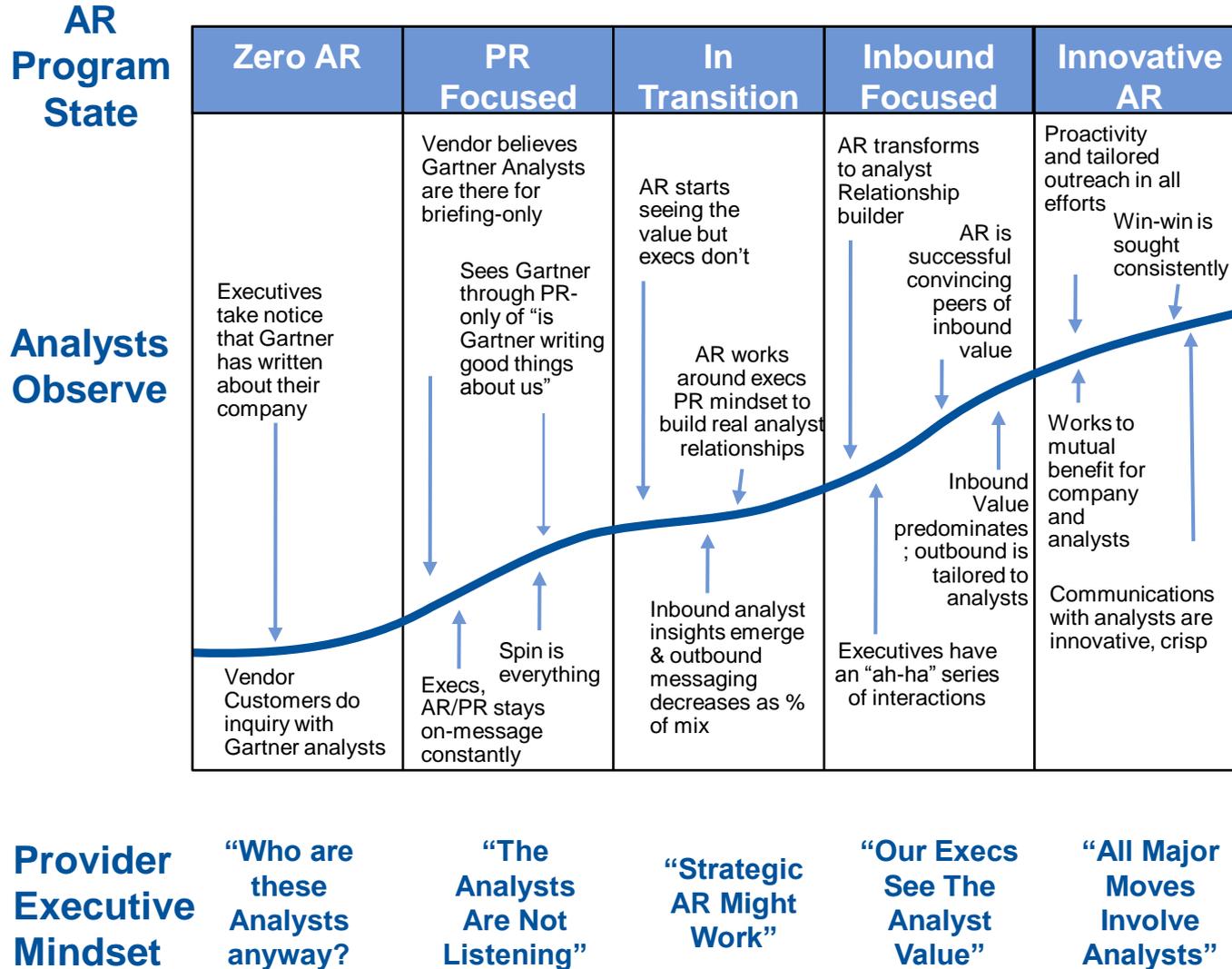


“Analysts and AR people do benefit from a mutually respectful relationship. We have refined our culture over the years to become more respectful and eliminate a lot of the sarcasm and arrogance that used to pop up during the research process. And, by the way if any AR person sees a departure from that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

- Gartner Analyst

Analyst Relations Program Maturity

“It’s so way more than PR!” And It Takes Time!



Summary:

- A Strategic Use of Analysts builds you a better business
- Analyst and Executive Relationship building is essential
- 70% “Inbound”; 30% Outbound is Ideal Mix
- Effective Communications & strong Research process knowledge
- Professionalism is the glue that keeps contention from pulling relationships apart

Gartner AR Community Resources

- Register to become a member
- Gain access to Newsletters and webinar presentations
- Link to Valuable resources
 - Research Agenda
 - Vendor Briefings
 - Quote Policies
 - Methodologies
 - Research organization
- Contact us with your questions

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

Analyst Relations Community

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

October 2011 Analyst Relations Newsletter [Subscribe](#)



Jeff Golterman
GVP, Gartner High-Tech Telecom Programs

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- 2011 Symposium/ITxpo Themes and Tracks
- 2011 Analyst Relations Forums
- Compliance Program Update

Dear Colleague:

October has many of us anticipating [Gartner Symposium/ITxpo](#) season and the buzz created when thousands of CIOs, IT professionals, analysts and high-tech providers get together around the world to talk IT. We also look forward to the updated research positions that Symposium/ITxpo brings, many of which are driven by the major themes affecting and driving opportunity in our industry.

It makes sense then that we explore these themes. So we've invited David Willis, Gartner Symposium/ITxpo analyst keynote chair, and Jamie Popkin, U.S. Symposium/ITxpo chair, to discuss the themes behind the always-thought-provoking analyst keynote, and the conference tracks and presentations. Both David and Jamie provide insights into what our AR community members can expect to take away from this year's Symposium/ITxpo.

We'll also provide details for you on the upcoming Analyst Relations Forums that all of you are invited to attend in Orlando, Barcelona and, new this year, Gold Coast Australia. We'll wrap up the newsletter with an update from Jason Cutler, senior director, Gartner Licensing and Compliance, who will provide a resource for you regarding Gartner compliance issues.

2011 Symposium/ITxpo Analyst Keynote: David Willis, Gartner Symposium/ITxpo chair, provides our AR community with insights on what to expect in the analyst keynote at this year's worldwide Symposia events. David describes how massive mobility, maturing social networking, and cloud computing will impact us all like never before.

2011 Symposium/ITxpo Themes and Tracks: Jamie Popkin, U.S. Symposium/ITxpo chair, expands on David's discussion of keynote themes and highlights the key tracks and presentations that will be of high interest to our AR community. Jamie talks about the vendor-focused tracks "Strategic Vendors"

Join Us!

We invite you to join our Analyst Relations Community

[SIGN UP NOW >](#)

Resources

NEW! Register for 2011 AR Forums

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

CONTACT GARTNER

AR Community
arcommunity@gartner.com

Analyst Speaking Engagements
speakersbureau@gartner.com

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■ ■ ■ ■ Thank You!