

**This Policy addresses Gartner's position on -- and documents a process for -- client requests to include non-licensed Third Parties in Gartner Inquiry and Strategic Advisory Services ("SAS") Engagements.**

**Policy Purpose:**

This Policy documents a process for the review and oversight of all requests (typically submitted by Gartner Sales on behalf of their clients) to allow non-licensed Third Parties to participate in a client's Inquiry session, SAS Internal Advisory Session or SAS Remote Advisory session.

**Definitions:**

- Participate means both physical attendance and "listening in" via teleconference.
- Third Party is an individual who is not an employee of the client organization but who fulfills the duties of an employee without being employed by the client. Examples may include: AR Firm representatives or outside consultants. Please note, these individuals may represent multiple client organizations.
- Inquiry sessions are 2-way strategic conversations between Gartner research advisor(s) and authorized Licensed User(s) from the client organization. These sessions, which provide access to those Gartner research advisor(s) associated with the service purchased by the client, are intended for the Licensed User(s) of the client organization only. For additional guidance, please see the [Gartner Usage Policy](#) (formerly the Usage Guidelines for Gartner Services).
- SAS Internal Advisory Session engagement are internal advisory sessions at a client-selected location that enable a client to directly engage Gartner research advisor(s) for knowledge-based advisory or evaluation purposes. Attendees may include non-User client employees.
- SAS Remote Advisory Services enables the client to directly engage a Gartner research advisor via teleconference or videoconference for knowledge-based advisory or evaluation purposes. Attendees may include non-User client employees.
- SAS External Speaking Engagement consist of the direct engagement by client of Gartner research advisor(s) for some type of external speaking engagement at a client-requested site. Client, at their discretion, may invite outside parties, including Third Parties.
- Vendor Briefings are *one-way* presentations by a client or non-client tech provider to Gartner research advisor(s). Participants on the provider side are not limited to Licensed Users; Third Parties may also participate at provider discretion, provided that they are announced at the outset of the session.

**Policy Overview:**

The Gartner business model is based on single-user licenses, which allow a client's designated users ("Licensed Users") to individually access Gartner Research and Inquiry, in accordance with the terms of their contract. Only Licensed User(s) from the client organization are authorized to access Gartner Research and participate in Inquiry, SAS Internal Advisory Sessions or SAS Remote Advisory Sessions.

Based on the above, Non-Licensed Third Parties:

- (i) May not access/use Gartner Research; and

- (ii) May not participate in/attend Inquiry sessions, SAS Internal Advisory Sessions or SAS Remote Advisory Sessions; but
- (iii) May attend External SAS Advisory Sessions and Vendor Briefings.

**The Review Process:**

In situations where a client asks Gartner to make an exception to this Policy and allow a Third Party to access and/or use Gartner Services other than Vendor Briefings and SAS External Speaking Engagement, the following framework is applied:

<b><u>Inquiry</u></b>	<b><u>Internal Advisory Session</u></b>	<b><u>Remote Advisory Services</u></b>
<p><u>Client must:</u></p> <ol style="list-style-type: none"> <li>1. Purchase a separate License to satisfy entitlement requirement* for Third Party to attend Inquiry;</li> <li>2. Arrange for Third Party to sign a Gartner Non-Disclosure Agreement;</li> <li>3. Pass on to the Third Party the <a href="#">Gartner Usage Policy</a>; and</li> <li>4. Be liable in the event of the Third Party’s misuse or non-compliance with the Services (email confirmation from client is sufficient).</li> <li>5. Upon termination of Third Party’s contractual relationship, to promptly reassign the License to another employee in the client organization or Third Party.</li> </ol> <p><u>Third-Party must:</u></p> <ol style="list-style-type: none"> <li>1. Have an email address and business card assigned by the client, demonstrating that the client has more than short-term interest in a relationship with this Third Party.</li> <li>2. Agree to limit its use of the Gartner Services to the business needs of the client that purchased the Services.</li> <li>3. Use only the client-assigned email address for their Gartner profile and gartner.com username so that usage can be audited and reported to client if necessary.</li> </ol> <p>If all of the above criteria have been met, the Licensed Third Party may schedule and</p>	<p><u>Client must:</u></p> <ol style="list-style-type: none"> <li>1. Arrange for Third Party to sign a Gartner Non-Disclosure Agreement;</li> <li>2. Be liable in the event of the Third Party’s misuse or non-compliance with the Services (email confirmation from client is sufficient).</li> </ol> <p><u>Third-Party must:</u></p> <p>Have an email address and business card assigned by the client, demonstrating that the client has more than short-term interest in a relationship with this Third Party.</p> <p>If all of the above criteria have been met, the Third Party may participate in an Internal Advisory Session.</p>	<p><u>Client must:</u></p> <ol style="list-style-type: none"> <li>1. Arrange for Third Party to sign a Gartner Non-Disclosure Agreement;</li> <li>2. Be liable in the event of the Third Party’s misuse or non-compliance with the Services (email confirmation from client is sufficient).</li> </ol> <p><u>Third-Party must:</u></p> <p>Have an email address and business card assigned by the client, demonstrating that the client has more than short-term interest in a relationship with this Third Party.</p> <p>If all of the above criteria have been met, the Third Party may participate in a Remote Advisory Services session.</p>

participate in Inquiry sessions* via the Talk with an Analyst function on gartner.com.		
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\*Since Inquiry is a Research deliverable, access to Research and Inquiry is determined by Research access entitlement.

**NOTE:** In no instance is it ever acceptable for a Licensed User to share his or her gartner.com Username or Password with a non-Licensed User, either inside or outside the client organization. Please [click here](#) for further guidance.

***Send an email to [Usage.Guidance@gartner.com](mailto:Usage.Guidance@gartner.com) if you have questions or need more guidance.***

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