

# Gartner Analyst Relations Newsletter

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This is a PDF version of the Gartner Analyst Relations Newsletter, 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. Visit <http://www.gartnerinfo.com/arnewsletter/> to subscribe.

## In This Issue

AR Professionals:  
Get More From Gartner

Global vs. Local:  
Finding the Right Analyst

Getting the Most From  
Your Relationship With  
Gartner

How to Engage the  
Gartner Ombudsman

Analyst Perspectives  
on Successful Vendor  
Briefings

New to the Research Team

## Mark your calendar:

**December 5, 2007**  
**Analyst Relations**  
**Quarterly Call**

**11:30 a.m. – 12:30 p.m. EST**

Visit the Vendor Relations page on [gartner.com](http://gartner.com) for the agenda and dial-in details.



Aaron Yaverski  
Group Vice President

## AR Professionals: Get More From Gartner

AR professionals in all segments frequently ask us how they can gain more insight into our research processes so that they can more effectively engage with us. We are asked how AR professionals can make better use of our resources to help their organization become a more competitive provider of technology products, solutions and services.

If this describes you, this issue will help shed light on common questions.

- Want to make sure that you have briefed all the appropriate analysts? Read Jenni Lehman's story.
- Gartner analysts provide firsthand advice on how AR professionals can prepare for a successful Gartner Vendor Briefing.
- Matt Goldman talks about Gartner resources that are often overlooked by AR professionals—and how you can take maximum advantage of them.
- Has your organization ever taken issue with a Gartner opinion and requested that we correct it? Gartner Ombudsman Nancy Erskine gives insight into how AR professionals can deliver feedback for Gartner consideration.
- We also provide a summary of new members of our research team, their coverage areas and the experience they bring to Gartner.

Analyst relations professionals have been asking for more transparency into the Gartner research process. Newsletters like this, designed especially for you, are created with that in mind. So take a look and get back to me with suggestions for other topics you'd like us to "demystify" to help you be more successful in your role.



Jenni Lehman  
Group Vice President  
Research Operations

## Global vs. Local: Finding the Right Analyst

### Can you relate to this scenario?

You're about to arrange a Gartner briefing. Your story is broad and deep. Your offerings cross the software, IT services and system integration markets, and you've got powerful niche solutions in financial services, media and entertainment. You've done well in the Americas, and you're about to enter Japan.

## **As an AR manager, how do you make sure the right Gartner analysts are pulled into the loop?**

“There are two things AR professionals can do to make sure Gartner is properly briefed,” says Jenni Lehman.

“First, make sure your briefing request contains everything we need to know about what you’re doing in markets that cross technology, geography and key verticals. We will invite the analysts who align with your product and go-to-market strategy.

“Second, and this is really important, give us the specifics of any changes that have occurred in your world that make a briefing necessary. Are you launching solutions in geographies that are new to you? Are you changing the way you compete due to an acquisition? Have you cracked new codes on emerging technologies that add horsepower to your competitive strength? Briefing requests that call out important events and occurrences compel analysts to get on the call.

“People in public relations know a press release will rise above market noise if it’s newsworthy. The same holds true with a vendor briefing. There needs to be a compelling force behind it.”

## **As an AR professional, let’s assume you framed your briefing request in a compelling way. The right analysts were on the call, and the briefing went well. What happens next?**

“First,” Lehman says, “the detailed briefing goes into a central repository that’s available to all analysts. All the documents are there, including details of what was discussed, who was on the call from the vendor side, which Gartner analysts were briefed and why. Many include a full audio recording of the briefing.”

The vendor briefing repository is a useful source of information to analysts. Lehman explains, “If a German-based analyst gets an inquiry about a vendor they aren’t completely familiar with, the repository is an immediate source of information. It’s rich with detail, including the analysts who can be contacted for more information.

“Second, the analyst engages their own professional network. If an analyst learns that a vendor is significantly changing the way it competes in Europe, they will let their colleagues know.

“Further, our analysts cross disciplines. They collaborate in formal research communities and projects that span multiple topics. If things come up in a briefing that we know one of our industry or geography teams needs to know about, we bring them into the loop. End-user clients are also notified of significant news that comes out of briefings during the normal course of our inquiries.”

Lehman adds that “It all goes back to framing the briefing the right way. Markets are full of noise, so AR managers need to be specific. Tell us what’s changed, what’s new and what’s compelling you to brief us. If you do that, we’ll do our best to get you connected with the right analysts.”



Matt Goldman  
Research Vice President

## Getting the Most From Your Relationship With Gartner

Having spent several years with companies such as Technology Solutions Co. (TSC) and KPMG, Matt Goldman understands the AR manager's role. In this interview, he tells AR managers how they can maximize the benefits of their Gartner relationship.

### **As an AR manager, how should I reinforce the value of Gartner to my management team?**

As an AR manager, you can get more value from Gartner by reminding your management team of three key benefits:

- First, Gartner provides your company with an additional communications channel for expanding its brand awareness.
- Second, we help you identify opportunities and threats you may not be seeing—two things that are extremely informative when you update your product development and go-to-market plans.
- Third, we're a great sounding board for new ideas. Even if a solution is still undefined and conceptual, technology providers that get Gartner opinion early avoid surprises later on.

### **What Gartner resource do technology providers overlook the most?**

Technology provider firms tend to overlook our advisory services. For example:

- Managers on both the technology and business sides are consumed with their day-to-day activities, causing them to occasionally miss seemingly insignificant moves by their competitors that can be quite meaningful. Inquiry helps shed light on nuances in market behavior that provider managers can use to their advantage.
- Inquiry services also help product managers understand when and how an emerging technology can breathe new life into one of their mature offerings or help them respond to market gaps with new product innovation.

### **Can AR managers use Gartner to get reactions to their market messages?**

Yes, especially through Gartner Vendor Briefings.

- As an AR manager, you likely use Gartner briefings to communicate your broad market messages. But don't overlook opportunities to test your messages with specific segments, especially when those messages could pique the interest of a broader set of Gartner analysts.
- For example, in vertical markets: Let's say your company addresses important issues in the private banking segment of the financial services industry. Or maybe you deliver breakthroughs in claims processing for insurance firms. Perhaps your solution complements adjacent applications in CRM, contact center management or sales force automation.

By telling us about the benefits you deliver in niche segments and adjacent markets, you capture the attention of a larger number of analysts who are interested in your company's story.

### **What's your best advice for technology providers that are new to Gartner?**

- Get a solid understanding of the Gartner point of view in your domain.
- Work with your account manager to build your coverage map. Set alerts on [gartner.com](http://gartner.com) and identify relevant conferences.

Doing these two things will help you consume our research in a relevant way—and at a pace that is manageable.



Nancy Erskine  
Group Vice President  
Office of the  
Ombudsman

### **How to Engage the Gartner Ombudsman**

Gartner methodology is designed to be independent, unbiased and fair. But when you as an AR professional are faced with the rare case where you don't fully understand your position in a Magic Quadrant or your Vendor Rating, for example, there are some actions you can take. "There is a defined process that a vendor can follow if they take issue with anything Gartner has published or recommended in a consulting engagement or anywhere else where they are impacted by Gartner opinion—even sales calls, presentations or media quotes," says Gartner Ombudsman Nancy Erskine. "AR professionals should first contact the Gartner analyst or consultant who authored the research or recommendation, but it's in your best interest to be well-prepared. Do your homework and have your facts together, and your case will be addressed quickly and thoroughly."

For research-related issues, the second point of escalation is the analyst's team manager, who will verify that all methodologies and processes were followed and that all Gartner positions have been appropriately supported. AR professionals should request the team manager's name from the analyst.

The final point of escalation is the ombudsman. When an issue reaches the ombudsman's office, one of its four Gartner associates speaks with the person who brought the issue forward to ensure that they understand all of the relevant information.

- The ombudsman will then work with the relevant people, systems and documents, internal and external to Gartner, to resolve the issue. Sometimes it's just a matter of bringing the parties together to work the issue through on an even playing field. Other times it requires changes to published documents or even policies, or simply reinforcing existing guidelines and policies.
- Once issues are resolved, all appropriate parties are informed of the outcome and that "the case is closed." In all cases, the process is thoroughly documented so patterns of occurrence can be tracked and reduced or eliminated.

One exception to this process is when Gartner has published a factual error that is potentially highly damaging to the vendor. Erskine says, “In these cases, the document can be rapidly removed from circulation and then, when the error is fixed, everyone who read the report in question can be informed that the correction was made—and why. The good news is that this doesn’t happen often.”

Erskine recalls a situation when the process worked well: “There were multiple issues in one case that was particularly complex and included published research, consulting engagement findings, events and even analyst newspaper quotes. The vendor’s side of the story, and their supporting arguments, were well laid out and straightforward to investigate and substantiate. In the end, we were able to resolve each issue satisfactorily and update the findings that warranted change.”

“We are all about making this process transparent,” said Erskine, “and that’s why it is fully defined on the Ombudsman page of [gartner.com](http://gartner.com).”

## **Analyst Perspectives on Successful Vendor Briefings**

Five analysts share their advice for AR professionals who are preparing for a Gartner Vendor Briefing.

### **What’s the key information you look for in a Vendor Briefing?**

Massimo Pezzini, vice president and distinguished analyst, application development integration and Web technologies, says:

- “There’s no better way to communicate that your product is delivering its intended business benefits than telling a story of a successful implementation. I like to remind vendors just how powerful this technique can be.
- “If you have not sold a new product and, hence, you have no success stories, be sure to tell us about any pilots that have been completed. Analysts appreciate this and won’t interpret it negatively at all.
- “Have your numbers ready for basic questions such as, ‘How many customers do you have? How many engagements do you deliver per year? What’s your market share? Which verticals are you pursuing?’ AR professionals should ensure that everyone in the briefing can recite their numbers cold with no hesitation.”

### **What’s your best advice for an AR professional who is preparing their company to brief Gartner for the first time?**

Andrew White, vice president research, business applications and process, says:

“As a new vendor, we expect to see a different twist on an old problem or the vendor putting technology to work in a new and innovative way. But unfortunately, many

vendors new to the Gartner briefing process consume too much time with what they believe to be a unique point of view that actually doesn't communicate anything new. Facts always talk louder than chest beating.

- “AR professionals should ensure that their company clearly differentiates itself from existing players in the market; marketing hyperbole won't impress the analyst.
- “When a vendor new to the market says, ‘We know more about this than anyone else,’ it causes any audience, including an industry analyst, to shut down. Communicate with pride, and with facts, but be careful not to get too egocentric.”

### **Should AR managers cut all selling out of their company's briefing with Gartner?**

Hung LeHong, research vice president, retail segment, says:

“We expect vendors to engage in a certain amount of selling when they brief us. But as an analyst relations manager, ensure that your presentation team knows that a vendor briefing is not a sales call. It is an opportunity to build understanding and trust. If your company is pushing the technology envelope or has landed a unique deal, we want to know about it. But be careful not to oversell.

- “Remind your management team that Gartner analysts cross-check and validate everything they hear. If you oversell something, we'll find out about it. And if overselling becomes a pattern, it will actually erode our trust.
- “Vendors should not be shy about telling us they've learned from their mistakes or that they made assumptions that didn't play out as they intended. There is no such thing as a perfect implementation or a perfect product strategy. If you tell us about things that went wrong and how you're correcting them, we interpret that very positively. If you tell us everything is going perfectly, that can actually raise a red flag.”

### **What should an AR manager do when a Vendor Briefing gets combative or argumentative?**

Earl Perkins, research vice president, secure business enablement, says:

“Vendor Briefings can get argumentative for any number of reasons. The best advice I can give AR managers is to take preventive steps to avoid arguments from happening in the first place:

- “Prepare no more than five to seven slides—and keep them brief, crisp and focused.
- “Use the five-to-10 rule, which means allow five minutes for questions after each 10-minute segment of presentation; that way, you will ensure you make it to the last slide. Few analysts, if any, will hold their questions to the end of your presentation.
- “Be sure to brief your management team on the purpose of the Vendor Briefing: to understand your strategy, product planning/development, road map and architecture.

- “Of course, we want to understand your marketing and sales strategy, especially if you’re a startup, but save it for the presentation’s end. Ensure that the presentation includes competitive context, customer retention, partnership and licensing strategies. Keep it tight and focused.
- “If you’ve done your homework and briefed your management team correctly and an argument still erupts during a briefing, table it.

“Some disagreements need to be aired, but try not to waste valuable Vendor Briefing time with issues. As an AR manager, request a call with the source of the tension, which can often be over a Gartner Magic Quadrant positioning, Gartner MarketScope study or other published research. As a last resort, there’s the Gartner Ombudsman. But keep in mind, disagreements and issues are best resolved at the analyst level.”

### **What should an AR manager do when some bad or even damaging press is released about their company just before a scheduled briefing?**

Allie Young, vice president and distinguished analyst, outsourcing, says:

“Not long ago, I attended an event sponsored by a vendor that had just experienced some pretty rough waters. The CEO faced the issue head on. He didn’t wait until mid-presentation to address it; he didn’t wait for the Q&A. He acknowledged it right away along with what he and his team were doing to manage the situation. It was the best way to go.

- “My cardinal rule: Don’t ignore unfortunate bad press. Be proactive and follow the Tylenol model. Tell us, to the extent you can, the context of the situation, the facts as you see them today and what you’re doing about it. Have a senior executive present if appropriate.
- “In some cases, there will be things that are confidential. You may be in a quiet period, or the situation might involve rumor. We understand that you’ll have communications constraints, but generally, transparency is the best advice I can give AR managers in this situation. Tell us your side of the story with the truth as you see it.
- “Canceling a briefing in the wake of some unfortunate bad news is usually not a good idea because it can validate the situation. If you’re not prepared to talk about recent bad news, you can still acknowledge the situation and table the discussion until you’re ready.”

Visit the Vendor Briefings page on [gartner.com](http://gartner.com) to learn more and to request a Vendor Briefing.

## New to the Research Team

Twenty-one new analysts have joined Gartner so far this year. As an AR professional, it's important for you to keep up to date with which analysts cover your organization, especially when new analysts join. A complete list of analysts can be located in the Vendor Relations section on [gartner.com](http://gartner.com).

### **Eric Deitert**

Research Director  
Business Process Management (BPM)

Eric advises clients around the globe in business process management and the application of business rule engines for higher performance. In his role, he analyzes the current and future states of BPM technologies, providers and products. Prior to Gartner, Eric worked in software development for commercial firms that provide business process improvement solutions, where he held roles in market strategy, market analysis, and product marketing and management.

### **James Richardson**

Research Director  
Business Intelligence (BI)

James focuses on business intelligence and performance management. Prior to Gartner, he worked in global market intelligence for a commercial BI provider where he delivered competitive intelligence and strategic analysis to both field operations and senior management. His background includes commercial BI software development, where he held several roles in technology and marketing management.

### **Mark Stahlman**

Research VP and Gartner Invest Analyst  
Emerging Trends and Technology

Mark is a technology strategist in the hardware/systems sector. He has a broad, deep background in the computer and networking industries, including significant Wall Street experience where he was a managing director, senior research analyst and technology strategist for a leading investment bank. He has also studied molecular biology and genetics.