

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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Jeff Golterman
GVP, High-Tech &
Telecom Programs

Dear Colleague:

If “flat is the new growth” was the mind-set for the first half of 2009, “growth is the new growth” is quickly becoming the mantra for the second half. Many analyst relations professionals in their efforts to contribute to their companies’ return to growth are working very closely with product innovation, marketing and sales. AR professionals, in the Q1 AR Community survey, mentioned that finding “new ways to work more closely with marketing” in particular was of immediate value. So for our newsletter, we sought out CMOs who could share their perspectives on how AR professionals can contribute more effectively to marketing.

Our centerpiece interview is with [Heidi Melin, CMO of Polycom](#), who shares her perspectives on AR as part of the marketing team and discusses how AR is uniquely positioned to work closely with analysts as key influencers on IT decision makers through conventional relationship building and by leveraging social media. Heidi’s perspective sheds new light on how to foster effective collaboration between marketing and AR.

As members of the AR Community get ready for Gartner Symposium/ITxpo around the world, we’ve asked [Peter Sondergaard](#), global head of Gartner Research, to share his perspectives on what AR can expect to see at the event. Also included in Peter’s Research Update is an announcement of a new discipline called “pattern-based strategy,” which will be highlighted at Symposium/ITxpo by Gartner Research.

Expanding upon Peter’s Research Update, Jenni Lehman, GVP of Gartner Research Operations, shares her perspective on recent [analyst inquiry trends and a preview of the Evidence Sidebar](#), another innovation in Gartner research methodologies. Partially in response to requests from the AR Community for greater transparency within its methodologies, the Gartner Evidence Sidebar will communicate the sources behind the research. This will help AR professionals engage in more effective dialog with analysts, especially when providing data and information as part of the research process.

Further supporting our AR Community mission of helping AR professionals “work more efficiently with Gartner,” Nancy Erskine of the Gartner Office of the Ombudsman details enhancements to the [Gartner research issue escalation process](#), and Michael Yoo

James’s Corner



James Stanton
VP, Gartner High-Tech
& Telecom Programs

A Message From a Gartner Product Manager

Mark Your Calendar:

Join us for the Gartner AR Forum at our Fall Symposium/ITxpo

locations:

Orlando, Fla., U.S.A., on Oct. 20

Cannes, France, on Nov. 3

Fall Symposium/ITxpo high-tech provider agenda planners:

> Orlando

> Cannes

updates the AR community on the [process and policies behind Gartner analyst surveys](#). [New analyst arrivals](#) are also covered this quarter, which include new hires in areas such as Enterprise Architecture, Emerging Network Services, Storage Strategies and Manufacturing. Gartner VP James Stanton, product manager for the Gartner Analyst Relations offering, has an exciting update on [Gartner Search Analytics](#), a new tool that AR professionals can use to better understand and interpret IT end-user decision-maker searches on gartner.com.

Finally, we are very excited about our agenda for the upcoming AR Forums being held worldwide at Fall Symposium/ITxpo. We strongly encourage you to review our [Forum agenda and register](#). As an additional tool to help our high-tech provider clients navigate Symposium/ITxpo, Marisa Kopec and Mike Harris have created a [U.S. Symposium high-tech provider agenda planner](#) and [Cannes Symposium high-tech provider agenda planner](#) that will help AR folks pinpoint sessions you may not want to miss.

We look forward to seeing you at the AR Forums at Symposium/ITxpo in Orlando, Cannes and Sydney.

Regards,

Jeff Golterman



Heidi Melin
Senior Vice President
and Chief Marketing
Officer, Polycom

The CMO and Analyst Relations: An Interview With Heidi Melin

We sat down with Heidi Melin, CMO of Polycom, for an in-depth discussion of the important questions about AR in her organization. A marketing veteran with more than 18 years of corporate and agency experience, Heidi joined Polycom in 2007 as senior vice president and chief marketing officer. She is responsible for Polycom's high-touch marketing strategy, which includes global branding and corporate identity, analyst relations, field and channel marketing, corporate communications, enterprise solutions, demand generation, corporate functions and events. She was also chief marketing officer at Hyperion Solutions and a group vice president of marketing at PeopleSoft. You can follow Heidi on [Twitter:@heidimelin](#).

Many thanks to Heidi for sharing her perspectives and experience with us.

How is AR organized at Polycom?

From a direct perspective, I have complete oversight for AR. We put communications together under one umbrella called corporate communications, which includes the PR team, the internal communications team and the industry analyst team. The AR manager reports through corporate communications to me.

I'm a huge believer in marketing as a team sport. It's less about direct-line reporting, less about territory or span of control, and more about teamwork. Because when we're looking at a major product launch, everyone plays a critical role across the marketing function, especially AR.

What role does AR play in the marketing function at Polycom?

I think the AR function has always been important and can play an even greater role within the company, within the CMO organization and certainly well beyond. AR has a major role in our ability to drive our strategies for the company, which includes marketing strategies, positioning and messaging. I'm a firm believer in leveraging the AR function because it's a very strategic part of the CMO organization at Polycom. AR plays a key role in disseminating information outside the company, and helps us to align our messages across audiences including industry and financial analysts, our customers in the end-user community, the media and our channel partners.

AR is unique because the AR team can play a critical role on the front end of a product launch—getting input and helping to shape messaging and influencing the go-to-market-strategy, for example—but also playing a role on the back end, at launch, to disseminate that message out to our external audiences. So the AR team plays a critical role in a number of spots. That's teamwork, not departmental. It's all integrated within the communications function and the business processes that we have. So teamwork becomes very important.

The competitive insights we're able to gain from the industry analyst community is significant. Being able to understand the landscape from a customer's perspective is something that the industry analysts help us with every day; and that perspective helps shape our strategy from a marketing standpoint as well as from a product development standpoint.

What makes an AR staffer effective in their role? Has anything changed over the years?

Successful AR team members are very bright people and strong, independent thinkers, with strong initiative and an almost innate drive to move the ball forward. AR professionals have to be able to scale and to think on their feet in many situations, including crisis management. For example, in their broad set of functions, they have to be able to have an industry analyst answer a question for us, or serve as a company spokesperson, or be able to brief on an issue or a challenge. The ability to span from the very strategic all the way to execution details is also critical, because AR executives sit down with the company CTO for a strategic discussion to bridge a conversation with important analysts, but they also have to be strong in contractual negotiation details and the tactics involved. So they are skilled at communicating at a strategic level but are also comfortable enough to talk numbers.

AR professionals continue to be among the smartest people in the organization. But what has changed is the ability of AR to work with the top-tier and niche industry analysts more comprehensively for increased strategic value. They are more successful in helping to drive industry analyst opinion, feedback and market trends back into the organization, whether to the CMO, CIO or product manager, influencing the company's programs and products.

How do you measure the effectiveness of AR?

Overall, I look at how we are leveraging and building our relationships with the top-tier industry analyst firms, and how that is reflected in the marketplace dialog and with our customers. That includes research reports, as well as contributions to the media such as articles, and how all of this is influencing decision makers. It's important to be able to understand the big picture.

Our qualitative measurements are feedback from analyst reports and analyst quotes on our behalf, as well as direct feedback from the industry analyst. Measuring AR effectiveness is not like lead management where I can see all the responses coming in and turning into qualified leads and then turning into sales. AR is often more of a qualitative measure, such as talking to customers. We talk to our end users all the time in order to understand the direct impact of analyst firms.

We are able to take advantage of certain metrics including research reports and analyst mentions. We measure the linkages between some of the communications functions, such as how often industry analysts appear in media articles, including who's the most predominant industry analyst over the last quarter that talked about Polycom to the press. No matter which firm it is, top-tier or niche, we measure how many times analyst firms talk about us to the press on a quarterly basis.

What technologies facilitate the CMO-AR relationship?

We use Polycom video technologies for analyst briefings, which is an excellent way to exchange information and communicate. Working out of any office, AR sets up briefings with analysts and third parties, and nobody has to fly around the country.

Like most people, we're early on in our social media practice, but AR can get a good sense of what's topical with analysts from any firm before a meeting or before a product manager briefing. AR can see what's topical and what's out there, and what analysts are talking about on an ongoing basis. These technologies are in early stages, but the enormous value is apparent because they're about delivering content, and that's what the top-tier analysts do—they deliver content to clients.

The ability to leverage social media sites, whether it's Twitter, Facebook or LinkedIn, helps us extend our message and fuels our search engine referrals. Twitter gives me a little richer perspective on the dialogs going on in the marketplace than other services do. It's such a rich universe of content, and the ability to break it down into bite-sized pieces is aligned with my information flow. So there might be a specific Gartner analyst or another industry thought leader who I'm really interested in; I can get a glimpse into what they're thinking and what's topical for them by looking at their Twitter entries, and that's really valuable.

One specific AR benefit from Twitter is that industry analysts who follow Polycom AR re-tweet our information, and so they add it to their distribution for wider dissemination of our message. Twitter also has a peer group function for me when I share information with other CMOs. I find out things I never would have stumbled across because I've posted something on Twitter. Social media is going to have an amazing transformational role in our culture as we continue to use it.

Are analyst briefings valuable for the CMO? How does AR prepare you for analyst briefings?

Analyst briefings are always extremely valuable for me. I probably have at least one to two formal briefings a quarter. But we may also have a call with an analyst. Polycom's AR manager does a great job of briefing me ahead of time to let me know who the analysts are that I'm meeting with. For some of the niche firms, I get a good background on what they've covered in their past, what they're covering currently, what sort of issues they're wrestling with and areas they may want to delve deeper into. I am not the technology expert at the company, but my dialog with the industry analyst firms helps to shape our strategy from a marketing perspective. And when you're talking

about a competitive and dynamic landscape like the one that we participate in, that dialog is really critical to me.

How does the CMO interaction with AR differ from other functions, such as the CIO?

Our CIO leverages our relationship with industry analysts to help inform some of our own direction internally by getting the market insight about issues. I look at AR and the industry analyst firms not only as a way to gain feedback and insight, but also to help extend our message.

What are the most important things a CMO should know about analyst relations?

Successful analyst relations is about an ongoing relationship and a dialog. It's not just about us telling an industry analyst what we're doing; the best relationship is two-way. To get the most out of the relationship, you need frequent touchpoints, keeping each other posted on what's going on and sharing information. And don't be afraid to overshare. Give the industry analysts visibility into road maps and information under NDA. It's especially important with the analyst firms that can be most influential in our market, and so, segmenting the analyst firms is important.

I think the top-tier industry analysts bring a lot of value to the business, whether from insights or the ability to extend our message to the marketplace. Partnering closely with the most influential analysts is part of the relationship. We tier the industry analysts within our practice because we don't have unlimited resources. It's when you share information that the industry analysts can do the most to help us shape company strategy, because that's when they become engaged in our business.



Peter Sondergaard
Global Head, Gartner
Research

Gartner Research Update

Increasing the value of Gartner research to clients is one of our most important goals, and 2009 continues to be another busy year for delivering results. This fall, we're introducing pattern-based strategy, a new method by which decision makers can recognize and exploit new opportunities for growth to avoid disruption and stay competitive. Companies will be better able to weather change if their strategies anticipate and plan for situations effectively. Our Gartner Symposium/ITxpo 2009 program is expanded from previous years to include more session formats to promote client interaction with Gartner analysts as well as with peers. AR professionals will be particularly interested in the Hot Magic Quadrant sessions, focused 20-minute reviews of front-burner Magic Quadrants and their marketplace impact. With more sessions on the role of the CIO, AR professionals will be able to learn firsthand how decision makers are working with analysts and planning strategies. We look forward to seeing you at Symposium.

Introducing pattern-based strategy

During an economic crisis, businesses always learn lessons that they can capitalize on when the economy improves. Businesses can no longer afford to just "sense and respond" to market changes or obsess over lagging performance indicators. Instead, they need to seek and exploit novel patterns to foster growth, avoid disruption and enable innovation.

The current economic crisis highlights the need for all organizations to understand how patterns of customer opportunities, new markets and employee ideas can create a basis for growth.

Gartner calls this discipline “pattern-based strategy,” and we believe organizations must adopt it to survive—and thrive—in today’s business climate. Pattern-based business strategies use fresh sources of information, such as the wisdom of crowds or the power of a single blogger, to evaluate trends and gain a competitive advantage.

IT must take the lead to support pattern-based strategy. The IT organization, through established and new technologies, must help the business exploit new sources of patterns, model the effect of patterns and help enable resulting strategies.

Gartner will pursue pattern-based strategy in depth during the next several months, exploring the implications for many parts of the organization, including AR. Please join us at Symposium in a session that explains how pattern-based strategy applies to current business issues. To view this session, [click here](#) and from the Track options listed under Session Interests, select Virtual Track: Pattern-Based Strategy. We look forward to your questions and comments.

Gartner Symposium/ITxpo

This year, Symposium offers new content, new session formats and more interaction. Our Symposium program reflects attendee requests for more interaction both with Gartner analysts and with one another. Interactive problem-solving, new content and sessions designed specifically for different IT professionals will make for lively sessions and increased Research guidance for IT strategies. Also, this year we’re featuring more CIO-level content, brainstorming and interaction, with dozens of workshops to engage CIOs in collaborative, interactive activities, stressing the importance of application and business investments.

With this increased focus on the business side, on specific IT roles and on the CIO, AR professionals will be able to better understand how analysts assimilate their products and services into advice about business problems, customer choices and overall decision making.

We’ve summarized the Symposium highlights below. I encourage you to attend the sessions to get a unique picture of the marketplace, and to walk the ITxpo show floor to see how your products and services, as well as those of your competitors, are being presented and received.

Symposium highlights

Each type of Symposium session creates a different dynamic for the audience, and we encourage you to explore the format and topic areas you find most valuable for AR. Please come ready to listen, engage and learn through:

- Eleven case-study sessions, which are especially valuable for peer-group learning
- Nine panel sessions, where analysts dissect and discuss key topics live and offer a window into the research process
- Five debate sessions, which allow audience members to participate in the research process and to form positions

IT Leaders roles. An important aspect of the entire event is the significant design change that enables professionals from each role to have an event focused specifically on them. The complete agenda has been segmented to provide content that covers the breadth of issues and topics that are critical for each Gartner for IT Leaders role.

- **IT Leaders Workshops.** These workshops engage IT leaders in a highly interactive brainstorming environment, asking the difficult questions and finding the solutions. Covering several topic areas, there are more than 65 sessions in Orlando (and 20 in Cannes). More than 20 workshops are exclusively designed for the CIO. This new format is offered in response to direct attendee feedback requesting more interaction.
- **Focus on IT Leaders sessions.** A series of new role-focused sessions that delve into the roles, key functions and issues that drive each of the IT leaders, has been created exclusively for CIOs. In these tightly focused sessions, analysts will address key elements and issues of two IT Leaders roles, such as EA and portfolio management. They will then analyze how each individual role functions and how it interacts with the CIO. Presenting two of these in a single session, and interaction with the CIO attendees, enable CIOs to engage with content and analysis across all of their key leaders' roles in condensed, highly interactive sessions that make the best use of their time at Symposium.

Hot Magic Quadrants. Focused 20-minute reviews of “hot” Magic Quadrants—markets and technologies that are front-burner and critical for decision makers and the marketplace. This selection of Magic Quadrants is a relevant and broad mix of coverage based on several factors, including: an event attendee survey to evaluate the priorities of decision makers; our projections regarding the mix of customers likely to be attending Symposium; our desire to broadly represent the overall marketplace; what the analysts tell us is “hot”; and final selections based on timing of Magic Quadrants available for production during Symposium.

You can take part in Magic Quadrant review sessions in the theaters on the ITxpo show floor. Analysts review the underlying market and analysis, discussing leaders, challengers, visionaries and niche vendors in different market segments. The Hot Magic Quadrants for Symposium 2009 are:

- Application Infrastructure—Systematic SOA and SOA Composite Application Projects
- Business Intelligence Platforms
- Business Process Management Suites
- Content-Aware Data Loss Prevention
- Corporate Performance Management Suites
- Customer Relationship Management
- Data Quality Tools
- Desktop Outsourcing Services, North America

- Enterprise Architecture Tools
- Enterprise Content Management and Web Content Management
- Enterprise Wireless E-Mail Software Market
- Help Desk Outsourcing, North America
- Information Access Technology and E-Discovery
- IT Project and Portfolio Management
- IT Service Desk
- Managed Security Service Providers, North America
- Master Data Management of Product Data
- Social Software
- Unified Communications

Cloud computing. Multiple sessions on cloud computing include key trends, technologies, market impact, changing dynamics, and business implications. A special session for CIOs will be chaired by a lead analyst for cloud research, who will engage in a condensed, highly interactive session to “net it out” and deliver the overall impact of cloud computing for decision makers. AR professionals will be able to learn firsthand what decision makers are thinking about cloud computing, and what their strategies and tactics will be.

Sustainability and green IT. As part of the “hot topics” tracks, several sessions explore leading-edge thinking on the environmental implications of technology and the issues of sustainability and green IT. No longer a “nice-to-have,” green IT has clearly demonstrated cost savings and across-the-board productivity improvements globally.

Pattern-based strategy. This recently introduced area of research into information, patterns and decision making is highlighted at Symposium. A track of six sessions is included in the Orlando agenda.

Please contact your account manager for more information about these new formats and specific sessions. During Symposium, we’ll be keeping in touch with you through Twitter, LinkedIn and AgendaBuilder.



Jenni Lehman
GVP, Gartner Research

Inquiry Trends and Research Enhancements

As Gartner analysts continue to play a central role in IT decision making, the research inquiry process is a unique and reliable barometer of technology issues. Inquiry trends show that clients have embraced Gartner programs that focus on the current economic climate and are now turning their attention to topics like cloud computing, indicating their interest about what's on the horizon. Here are the results of some significant client activity during the first half of 2009 that point to these trends:

- Clients looking for direction on optimization, cost control and negotiation, and guidance on critical business planning, accounted for a significant rise in inquiry in the first half of 2009. Overall inquiry increased 28% for the first half of 2009, compared with the first half of 2008. Inquiries directly from CIOs increased 40% in the first half of this year, as hands-on decision makers sought more information and guidance on high-risk decisions.
- Clients are actively engaged in the emergent area of cloud computing as they develop their longer-term technology plans. A dramatic increase in the number of cloud computing searches, combined with the demand for our cloud computing research documents, indicates that clients are moving from more-focused IT economic planning to the next set of technology developments.

As CIOs, CTOs, strategists, marketers and other IT professionals continue to engage with us, we will keep you updated on significant inquiry trends.

Research preview: The evidence, please

For the AR community, we're offering a research preview of the new Evidence Sidebar, a response to client requests for more transparency into the fact base of our research. The Evidence Sidebar, which will be a standard part of many research documents this fall (see below), highlights the relevant sources of the analysis in easy-to-read text on the side of the page.

The Evidence Sidebar includes information such as methodology, data points, evaluation criteria and relevant survey content. While this information is embedded in research documents today, the Evidence Sidebar makes it easier to find by listing it all in one place. We expect this feature to help readers understand how analysts arrive at their decisions, and as a result have a greater understanding of how to apply the findings to their situation.

For AR professionals, the Evidence Sidebar will serve to further clarify and strengthen a course of action regarding recommendations, positioning and overall tracking. So for example, survey results, methodologies and assumptions will be easier to break out and use as a part of AR strategies and planning, as well as for communication back to Gartner.

CLICK THUMBNAILED TO VIEW IMAGE

Examples of Evidence Sidebar content includes:

Additional information or commentary	A link to methodology document
A description of models used	Primary research sources
Criteria for inclusion for providers or technology	Secondary research sources
Forecast assumptions	Cross-references to other Gartner documents
A high-level view of the methodology	Survey demographics

Approximately 30 different research types will now use the Evidence Sidebar, including:

Research Type	Evidence Sidebar to Include
Best Practice	Notes
Critical Capabilities	Methodology
Hype Cycle	Source, Methodology
Magic Quadrant	Methodology, Source, Notes (Optional)
Market	Notes, Source
MarketScope	Methodology, Source, Notes (Optional)
Strategic Planning Assumption (SPA)	Notes
Tactical Guideline	Notes
Technology	Source, Methodology, Notes
Technology Overview	Notes
Vendor Focus	Methodology, Source
Vendor Ratings	Methodology, Source
SWOT	Methodology, Source
Maturity Assessments	Methodology



Nancy Erskine
GVP, Office of the
Ombudsman

Introducing the Revised Gartner Research Issue Escalation Process

In 2006, Gartner introduced a process for providers (clients and non-clients) to submit a complaint about a particular piece of research, an analyst, a methodology—or anything else for that matter—that couldn't be resolved directly with a research analyst. Since that time we have had a lot of experience with this process. While that original escalation process provided a structured path to issue resolution, as time has gone by we've identified some important additions to make it even more helpful.

The [revised process](#) fundamentally remains the same:

- First, try to resolve your problem directly with the analyst.
- If that fails, go to the analyst's manager.
- If that fails, contact the Ombudsman.

The updated process includes some important changes: it is more specific about how and when to initiate each action, how long it should take, what you should expect, who can place a "hold" on a research publication and why they would do so.

It also provides some best practices for mounting successful escalations. One of these best practices is to prepare. When you escalate, be prepared with details to support your assertions—and share them up front. Prepare your product teams and executives to be ready immediately to discuss your allegations and rationale with research analysts and managers, as well as the Ombudsman. This will help everyone to understand the real issues on the table and take appropriate action.

Timing and responsiveness

We've added a strong element of time constraints to the updated process and details about what you need to do in each step. The reason for this is simple: Gartner is in the business of publishing research. The process for creating this research can be detailed and time-consuming. When an escalation is introduced, it often delays publication; this can strain the process itself, the people involved (analysts and providers) and the Gartner clients waiting for the research. So we ask all parties to respond quickly to action requests. While most escalations are resolved in less than a week, some take longer—especially very complex ones that involve multiple analysts and departments. We anticipate the timing guidelines will help accelerate even those complex ones.

Given the importance of timing, it's generally most expedient if complaints can be resolved directly between you and the Gartner analyst. In fact, this process starts with that interaction (Step 1). But when that isn't possible, we've developed Steps 2 – 4 to help resolve it.

The escalation process is pretty formal by design in order to be transparent and so that all parties know where an issue stands at any time. But please don't hesitate to reach out to us to get our advice about whether a document warrants escalation, or where to go with a thorny ethical issue. You don't need a process for that, just a phone number and an e-mail address: +1 203 316 3334 or ombudsman@gartner.com.

We're listening

You may remember that we did a Perception Audit of the Office of the Ombudsman late last year. In your responses to that audit, many of you said you'd like us to improve our frequency of communication during an escalation, and to identify next steps and final outcomes. We've attempted to address these concerns in the updated escalation process and in other process changes we've made internally to better facilitate follow-up and activity tracking. We expect to do that audit again in early 2009. Please let us know by your responses if we've succeeded.



Michael Yoo
SVP, High-Tech &
Telecom Programs

Process and Policies for Gartner Analyst Surveys

Technology and service provider clients regularly send Gartner requests to survey our analysts on a wide variety of analyst relations topics. Given the number of survey requests and questions about the survey process we've fielded recently, I thought it might be helpful if I revisited our policy on the subject in this issue of the AR Newsletter.

We want to be as responsive as we can to client requests to survey our analysts and at the same time, not overwhelm our analyst community with tasks that take them away from their primary research responsibilities. As a result, we use the following procedure for approving and conducting analyst surveys:

1. Please send your request to conduct a survey of Gartner analysts to analystsurveyrequest@gartner.com (please do not send requests to the Ombudsman's office). Requests should include:
 - Your decision to conduct the survey online or via phone interviews
 - The entire list of analysts you wish to survey
 - The complete list of questions, either in text or via URL
 - The frequency with which you plan to conduct the survey (typically annually)
 - How you will use the information
2. Once we have received your request, we will review it for approval (typically within 48 hours). We seek to ensure that:
 - All survey requests come from Gartner clients with inquiry privileges. Non-clients are always entitled to brief our analysts on their products and services, but only clients with inquiry privileges are entitled to query our analysts for feedback.
 - Online surveys require no more than 15 minutes to complete; phone surveys must be conducted during a 30-minute analyst inquiry
 - Online surveys contain only questions that pertain to the analyst's relationship with or perception of your company or your analyst relations function. Broad questions about our research findings, the marketplace or your competitors should be reserved for analyst inquiry.
 - Surveys do not overtax our analysts. We ask that you poll any individual analyst no more than once per year. We also may ask you to limit the number of analysts polled in any given survey. Lastly, we may suggest an alternate analyst in cases where a particular analyst is overwhelmed by multiple survey requests.

3. Once approved, we will send a note to the specified analysts authorizing them to respond to the survey. This note will also be sent to the requester. Note that analysts will not participate in any survey without this authorization.
4. The authorization note will also include detailed instructions on how to contact the analysts and begin your approved survey.
 - For online surveys, you are free to reach out to the analysts directly at this point. Individual analyst participation in online surveys is completely at their availability and discretion.
 - For phone interview surveys, you should work with our Client Service Organization to schedule an analyst inquiry call. Analysts are required to participate in surveys scheduled in this fashion. As with all analyst inquiry, the timing of the inquiry is subject to analyst availability.
5. Please send any further questions regarding your analyst survey to analystsurveyrequest@gartner.com (and not to our Ombudsman).

Occasionally, our clients would prefer to have a third-party organization conduct the survey on their behalf. We are happy to accommodate these requests. We require that the third party agrees not to resell or redistribute the information beyond the original requesting client. If you would like to use a third-party organization, please note that in your initial request and we can follow up with more detailed information on the necessary contracts, nondisclosure agreements, etc.

Our hope is that this process will help ensure that you get timely response to your request as well as more complete participation from our analyst community.

Let me thank you in advance for your cooperation. As always, I welcome your feedback at michael.yoo@gartner.com.

New to the Research Team

Sheila Childs

Research Director
Storage Strategies and Technologies

Sheila specializes in information life-cycle management, archiving and data protection. Prior to joining Gartner, she was director of software product marketing for compliance and archiving products at EMC, including the SourceOne product suite. Sheila also worked at Legato, OTG Software and BMC Software. She has a bachelor's degree in mathematics.

Steven Lefebure

Vice President
Industry Advisory Services, Manufacturing—Life Sciences, Consumer Goods

Steven specializes in supply chain strategy and channel management in pharmaceuticals and consumer goods. Prior to joining Gartner, he was a director at GlaxoSmithKline, with experience at AmerisourceBergen and Campbell's Soup. Steven has a master's degree in business administration with a concentration in finance and marketing.

Randy Rhodes

**Research Director
Energy and Utilities Industry**

Randy is focusing on power delivery applications, including energy management and supervisory control systems, geographic information systems, and other systems in T&D engineering and operations. Prior to joining Gartner, Randy was with PacifiCorp, where he managed a business improvement group focused on transmission planning models and GIS-based spatial load forecasting. He has more than 22 years' experience in the electric utility industry. Randy holds a master's degree in linguistics.

Mike Spink

**Research Director
Emerging Enterprise Network Services**

Mike specializes in enterprise network services, with a focus in cloud computing, hosting and co-location. Prior to joining Gartner, he held a number of senior management positions within the IT industry, including the management of mainframe IT departments for leading oil and gas companies. He holds a diploma in mathematics, statistics and computing.

Chris Wilson

**Research Director
Business of IT: Enterprise Architecture**

Chris specializes in enterprise architecture with a focus in governance, organization, architectural training and soft skills required in the architectural practice. Prior to joining Gartner, he worked at BP International, with global responsibility for architectural and technical guidance on major projects. Chris also worked at National Australia Group and Lloyds TSB. He has a bachelor's degree in computation.

As an AR professional, we know you want to stay current with the analysts who cover your markets. For a complete list of analysts, [click here](#).

James's Corner

Gartner Analytics delivers insight on your clients that you simply can't get anywhere else. In the AR Community survey, many of you pointed out that subscribers to Gartner for Analyst Relations couldn't get it at all! I am happy to report that is no longer the case. As a seatholder, your entitlements now include the ability to access our comprehensive suite of Gartner Analytics: Inquiry, Readership and Search. This includes our new online experience for Gartner Search Analytics.

New! Gartner Search Analytics Online

Every year, over 2 million searches are conducted by the end-users on gartner.com. We collect every search as it happens and store each unique search term in a database along with the demographic information of the client searching. Now we have a new online experience that allows you to conduct a real-time exploration of the search terms that matter most to you. Here's how it works:



James Stanton
VP, Gartner High-Tech
& Telecom Programs

Step 1: Enter in any search term, and hit enter.

Step 2: See the results, which include:

- Search term frequency
- Related search terms
- Breakdown of demographic data: industry, geography, enterprise size
- List of analysts who wrote research related to the term

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I hope to see many of you at the upcoming AR Forum in either Orlando or Cannes.