

# Welcome to the 2014 Enhancement Update: Gartner Research Process for Magic Quadrants

## Gartner Analyst Relations Community

**You are invited to a Gartner webcast on September 24, 2014, to learn about important enhancements to the Gartner research process for Magic Quadrants and companion content. These enhancements will save you time and effort in your support of these research projects.**

In this webcast, we will explain how Gartner is simplifying and scaling the production of our flagship content through a combination of targeted personnel and process optimization, supported by new standards, tools and best practices.

[REGISTER for Sept. 24, 7:00 a.m. EDT ▶](#)

[REGISTER for Sept. 24, 11:00 a.m. EDT ▶](#)

[REGISTER for Sept. 24, 8:00 p.m. EDT ▶](#)

On this call we will:

- Detail the specific documents, standards and best practices that are the foundation for a consistent, repeatable research process
- Help you understand the workflow enhancements that Gartner has put in place to bring critical steps earlier in the research process and better define the start and end points of important phases
- Inform you how we have optimized our communication model to signal what analysts are looking for early in the process and to effectively engage you in the discussion
- Answer your questions as an Analyst Relations professional, and provide you with resources to help you communicate these changes within your organization

This call contains audio and webcast.  
To participate in the audio portion of this call, please check your meeting invitation for local dial-in numbers and the meeting ID.

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# Optimized Delivery 2014

Enhancements to the Research Process Associated to MQs  
and Companion Content

Community Webcast  
September 24-25, 2014

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**Gartner**<sup>®</sup>

AR Community 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.

# Representing Gartner Research Today

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**David Black**  
**VP, Content Architecture & Methodology**



**Claire Dessaux**  
**MVP, Research Content Process**



**Nancy Erskine**  
**GVP & Ombudsman**



**Julie Thomas**  
**MVP, Research Content Strategy**

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# Agenda

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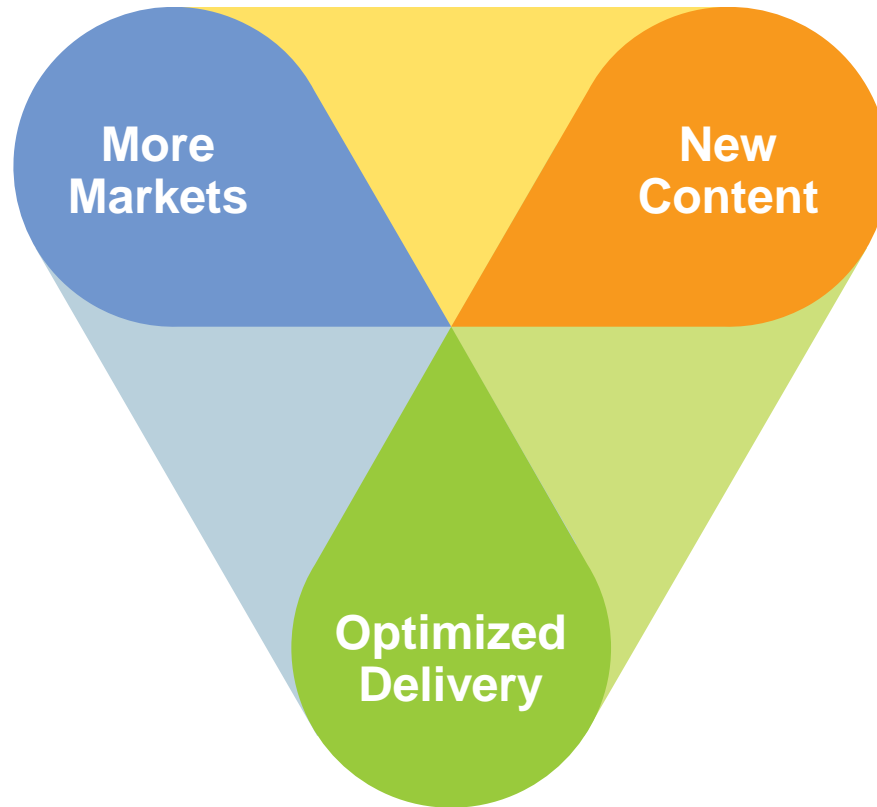
- Expanded Coverage of Vendors & Markets – Summary & Reminder
- Optimized Delivery – Strategy & Enhancements to the MQ Research Process
- Timeline & Rollout Plans
- Summary
- Q&A

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# Must-have Research Content Evolution Strategy 2014

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## Enhanced Overall Content Experience

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# More Markets. New Content.

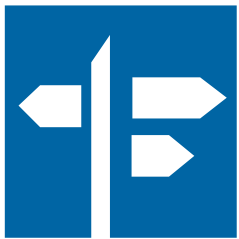
David Black & Julie Thomas

# Essential Research & Advice

## Strategic Technology Decision Making

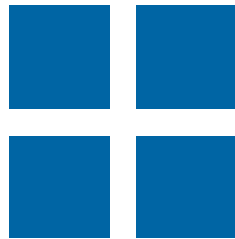


### Market Guide



Market & Vendor Dynamics

### Magic Quadrant



Market Analysis  
Vendor Comparisons

### Critical Capabilities



Product & Service Ratings

### Evaluation Criteria (GTP)



Detailed Feature Insights

*Assess markets and vendors*

*Perspectives for industries, geographies & company size*

*Insight into the capabilities and suitability of product and service offerings*

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# More Markets. New Content.

## Increased value for strategic decision making



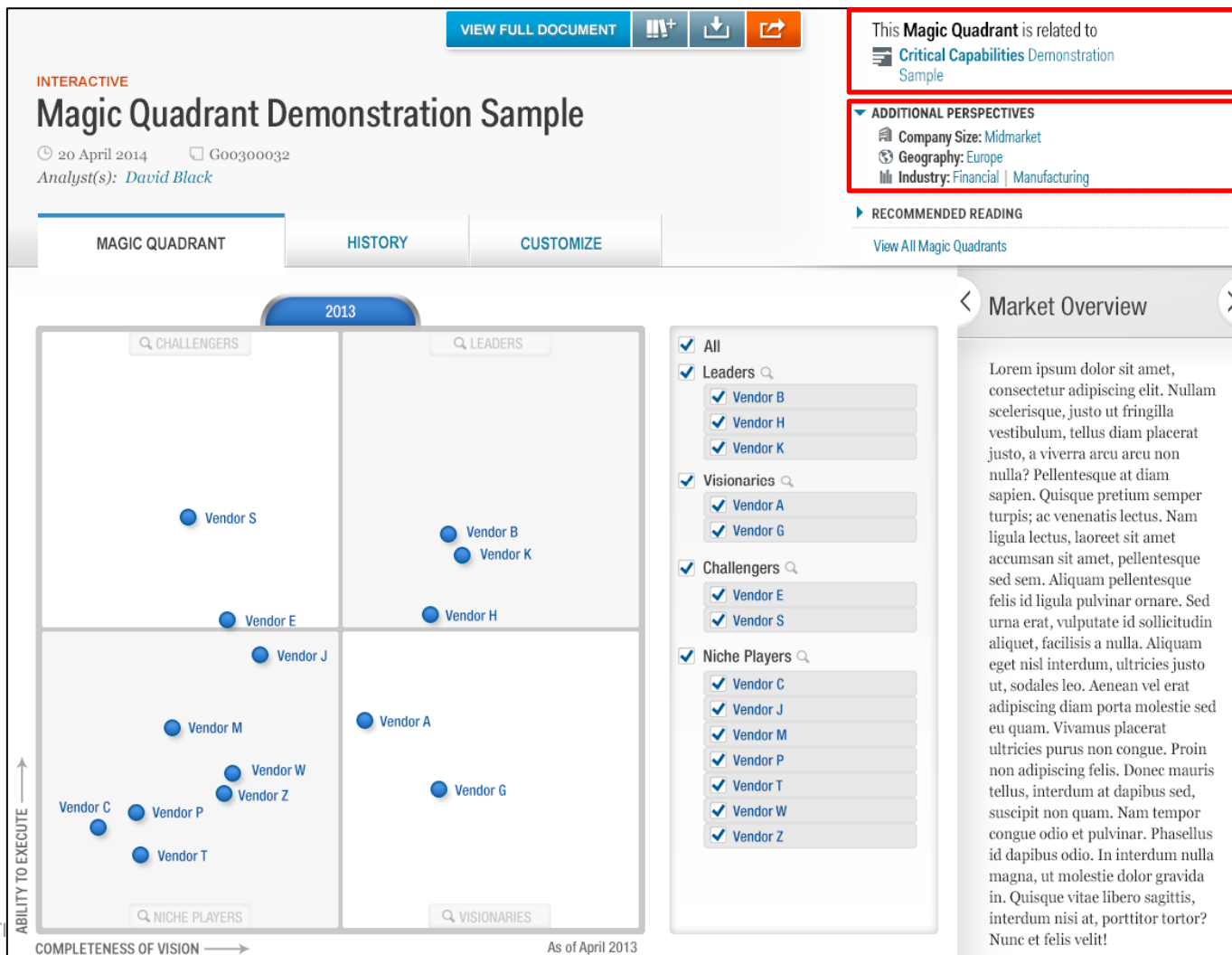
|   | New Content           | More Markets   |
|---|-----------------------|--|
|    | Market Guide          | 100+ New and Updated Emerging Markets<br><i>Available Now (Launched February 2014)</i>                               |
|    | Magic Quadrant        | 30+ New Magic Quadrants Contextualization for Industries, Regions & SMB<br><i>Available Now (Launched July 2014)</i> |
|    | Critical Capabilities | 45+ New Critical Capabilities New Interactive Tool<br><i>Available Now (Launched July 2014)</i>                      |
|  | Evaluation Criteria   | Aligned Content in Key Markets for ITL & GTP Clients<br><i>Available Now</i>   |

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# Interactive Magic Quadrant 2014



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# New Interactive Critical Capabilities



INTERACTIVE

[VIEW FULL DOCUMENT](#)

This Critical Capability is related to  
 Magic Quadrant Demonstration Sample

▶ ABOUT CRITICAL CAPABILITIES

▶ RECOMMENDED READING

## Critical Capabilities Demonstration Sample

🕒 20 April 2014    📄 G00300032  
 Analyst(s): *David Black*

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vivamus magna. Cras in mi at felis aliquet congue. Ut a est eget ligula molestie gravida. Curabitur massa.

1  
 USE CASE 1  
 Gartner Use Case

2  
 USE CASE 2  
 Gartner Use Case

3  
 USE CASE 3  
 Gartner Use Case

### Use Case 1

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean vulputate lectus sit amet erat egestas lobortis. Suspendisse semper ligula non ullamcorper ornare posuere.

#### Capabilities and Weightings

[CUSTOMIZE](#)

|              |     |
|--------------|-----|
| Capability 1 | 18% |
| Capability 2 | 9%  |
| Capability 3 | 10% |
| Capability 4 | 10% |
| Capability 5 | 10% |
| Capability 6 | 23% |
| Capability 7 | 10% |
| Capability 8 | 10% |

#### Scores

Sort by score ▼

|                             | FIT TO USE CASE (Scale 1-5) | BEST |
|-----------------------------|-----------------------------|------|
| ✓ Vendor Product/Service 1  | 4.35                        |      |
| ✓ Vendor Product/Service 9  | 3.80                        |      |
| ✓ Vendor Product/Service 11 | 3.70                        |      |
| ✓ Vendor Product/Service 7  | 3.50                        |      |
| ✓ Vendor Product/Service 6  | 3.50                        |      |
| ✓ Vendor Product/Service 8  | 3.50                        |      |
| ✓ Vendor Product/Service 5  | 3.40                        |      |
| ✓ Vendor Product/Service 2  | 3.30                        |      |
| ✓ Vendor Product/Service 3  | 3.20                        |      |
| ✓ Vendor Product/Service 12 | 3.15                        |      |
| ✓ Vendor Product/Service 4  | 3.15                        |      |
| ✓ Vendor Product/Service 13 | 3.05                        |      |
| ✓ Vendor Product/Service 10 | 2.95                        |      |

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# Optimized Delivery.

Claire Dessaux & Nancy Erskine

# What You Told Us

## Three Key Take-Aways

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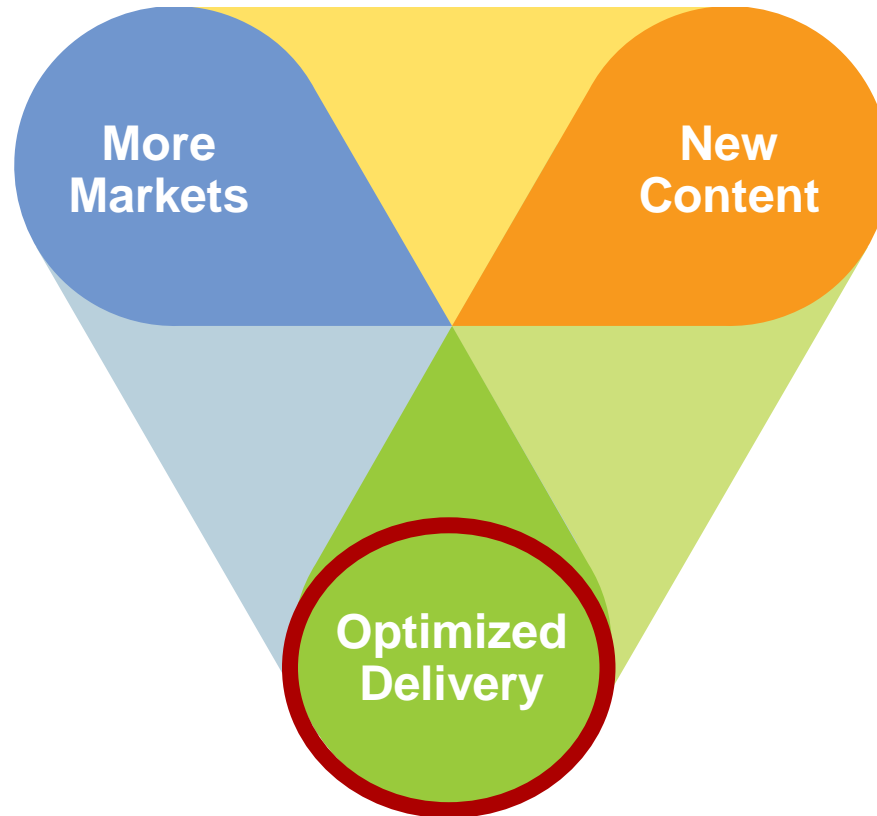
#1: Supporting MQs takes too much time and consumes too many resources, at the expense of other strategic activities.

#2: The MQ research process is inconsistent.

#3: We don't have enough visibility on schedules.  
We don't always know what analysts are looking for.  
We don't like surprises.

# Must-have Research Content Evolution Strategy 2014

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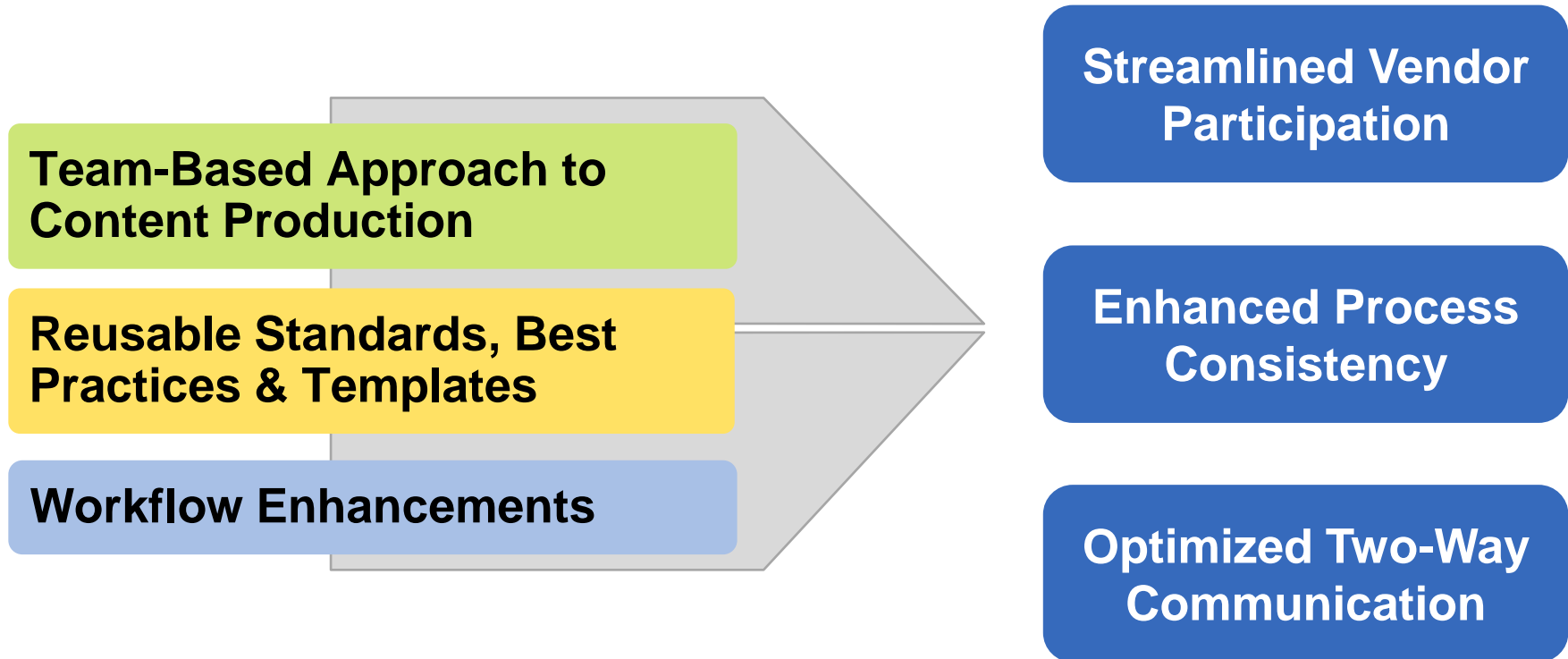


**Give Time Back to Analysts. Give Time Back to Vendors.**

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# Giving Time Back to Vendors

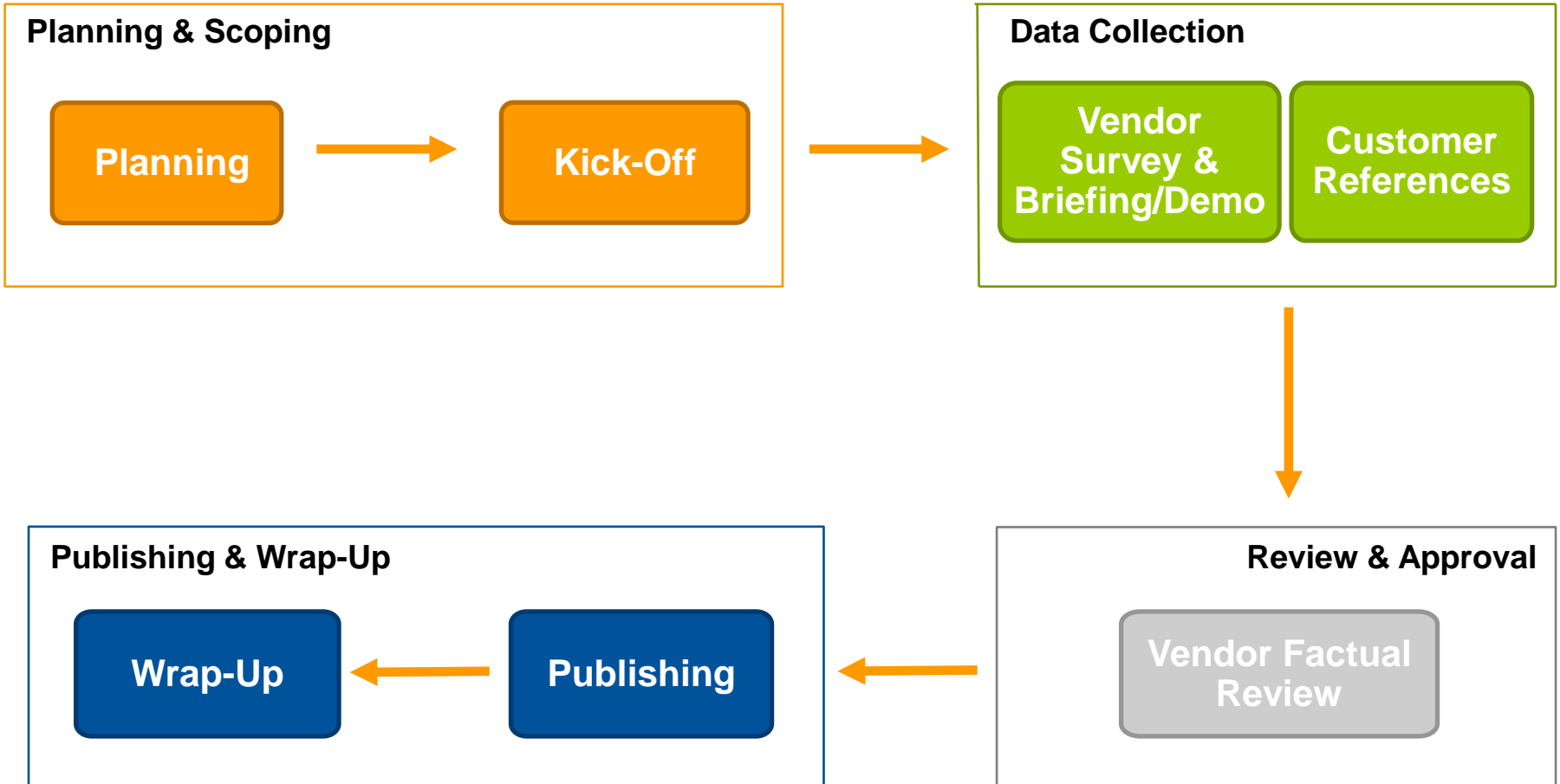


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# MQ Research Process

## Vendor Perspective



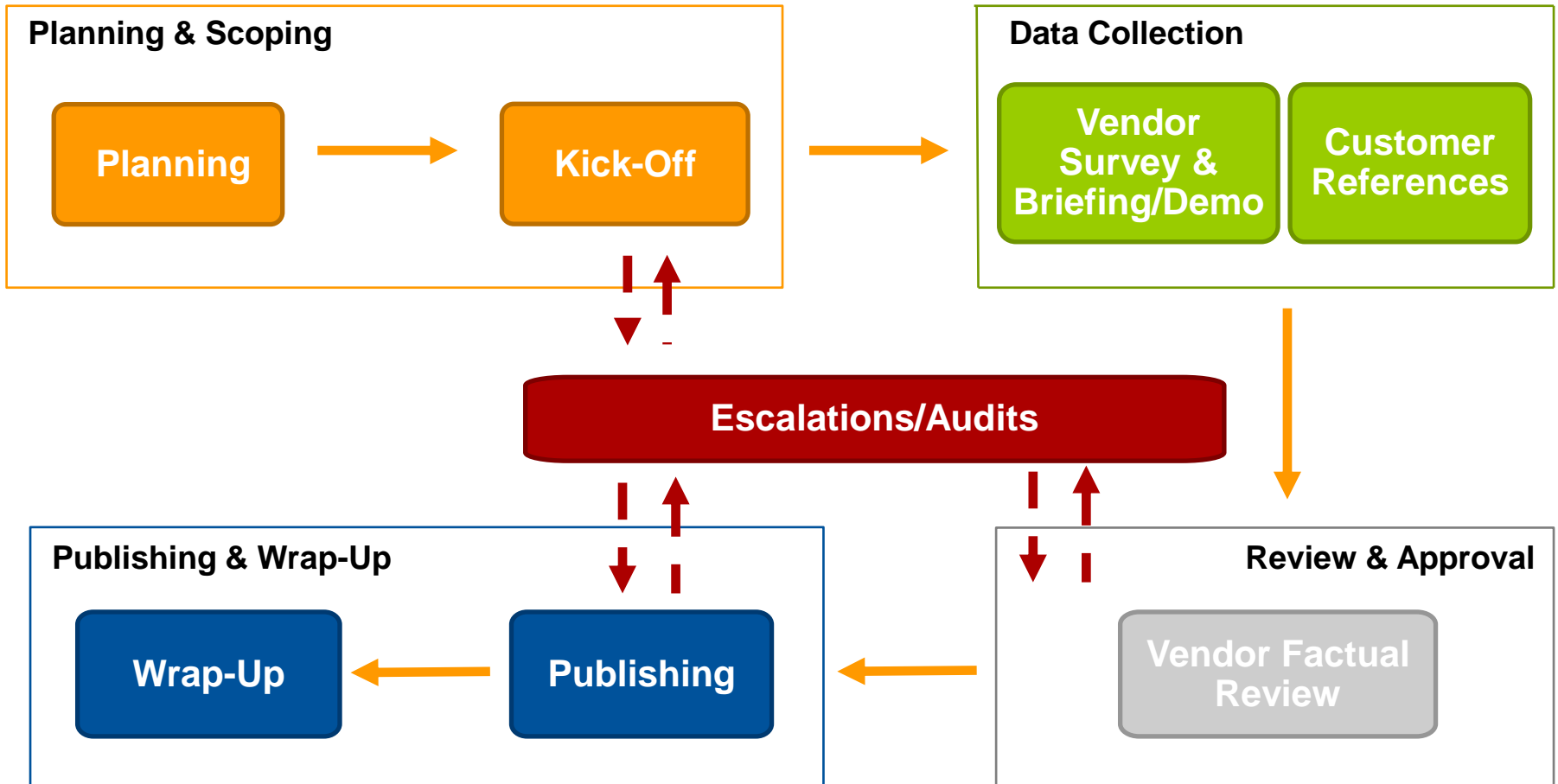
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# MQ Research Process

## Vendor Perspective



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Optional Phase

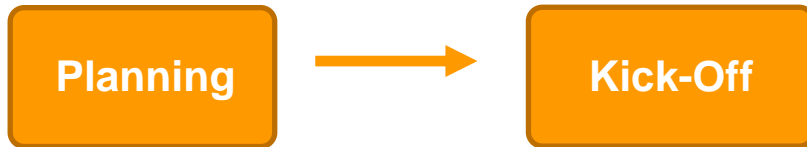


# Planning & Scoping (1 of 2)

## Key Enhancements



### Planning & Scoping



### What We Are Doing

#### Enhanced Publication Schedule

- Refreshed the 10<sup>th</sup> of every month
- Includes targeted publication quarter (to become month), kick-off month, author (co-author to be added), project contact name, and changes highlighted from one update to the next
- MQs + CCs (CC recently added) - MGs and MQCs to follow.

#### Dedicated Project Management Support

- To oversee and manage projects end-to-end
- Target: 100% coverage of MQs and CCs

#### Detailed Welcome Packet

- Five key sections: 1) Market description; 2) Inclusion criteria; 3) Evaluation criteria and sub-criteria; 4) Schedule; 5) Cut-off date for data collection
- Formal vendor acknowledgment required on inclusion criteria and schedule
- Reviewed and approved by Team Managers

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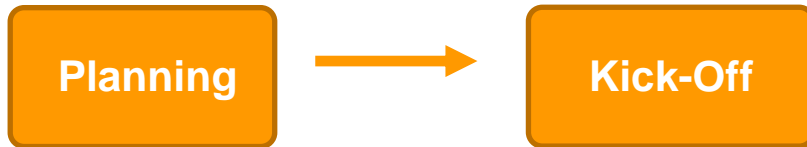
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# Planning & Scoping (2 of 2)

## Key Enhancements



### Planning & Scoping



### What We Are Doing

#### Proactive Notifications of Changes

- Explicit communications to vendors as early as possible of changes (lead author, criteria, etc.) with context whenever appropriate
- Drop-off notifications sent at the beginning of the process

#### Vendor Contact Verification

- Required confirmation from vendors
- Centralized management of vendor contact information

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# Data Collection

## Key Enhancements



### What We Are Doing

#### Standardized Documents

- Templates for vendor surveys, vendor briefings, and demos
- Common survey format that optimizes collaboration and team work for vendors

#### Centralized Scheduling

- All vendor interactions scheduled through Project Managers

#### Pilot: Vendor Survey Q&A Call

- Call mid-way through the vendor survey work to address vendor questions

#### Visibility in Customer Reference Work

- Consistency in the number of references requested
- Details on expected customer profiles
- Weekly status updates of survey response rates
- Video for customer references

### Data Collection

Vendor  
Survey &  
Briefing/Demo

Customer  
References

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# Review & Approval

## Key Enhancements



### What We Are Doing

#### Standardized Vendor Write-Ups

- Consistent format for vendor write-ups including Strengths and Cautions bullets

#### Pre-Editing before Vendor Factual Review

- To increase quality of the content coming to vendors for fact-check and minimize surprises

#### Factual Review Call

- To happen after vendors send comments back
- To help vendors explain the outcome of the analysis internally

### Review & Approval

Vendor Factual Review

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# Publishing & Wrap-Up

## Key Enhancements



### What We Are Doing

#### Pro-active Communication of Publication Delays

- With rationale whenever appropriate

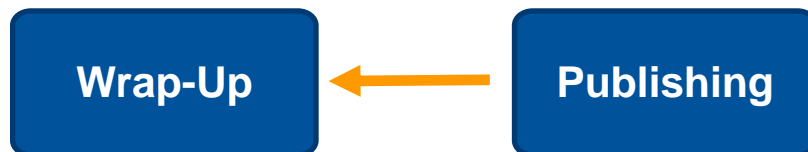
#### Courtesy Copies

- Sent to vendors as soon as MQs publish

#### Pilot: PR Plan Communication

- Highlights of PR plans associated to some publications for vendors to align to

### Publishing & Wrap-Up



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# Escalations/Audits

## Key Enhancements



### What We Are Doing

#### Clear Definition of Start/End Points

- Details on process steps, schedules, and best practices for all phases of vendor factual review and audit
- Structure and time lines to each step in the audit process (Team Manager and Ombudsman)
- Clear delineation of what we consider during escalation – and what we don't

#### Proactive Communication of Escalations

- Notification to all participating vendors with estimated impact on publication schedule

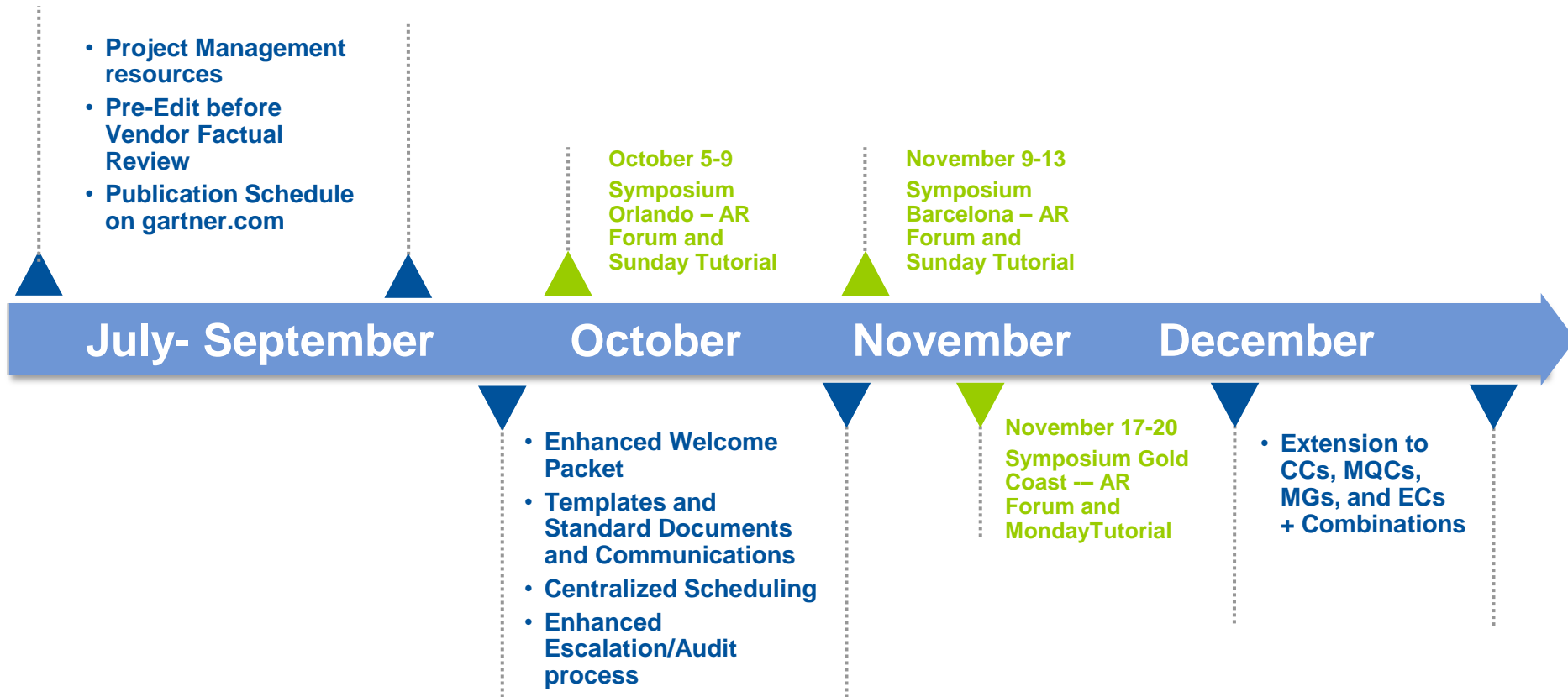
**Escalations/Audits**

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# Timeline & Launch Plans for 2014

## Incremental Journey



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# Symposium/ITxpo 2014



- MQ Tutorial on Sunday
- AR Community Forum on Tuesday



- MQ Tutorial on Sunday
- AR Community Forum on Tuesday



- MQ Tutorial on Monday
- AR Community Forum on Tuesday

## Information & Registration on the [AR Community Page](#)

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# In Summary

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- More markets and new content available **now**
- Streamlined research processes and optimized delivery **in progress – seamless transition**
- **More time and more capacity** for **strategic** engagements with Gartner analysts
- Keep sharing feedback and recommendations – we listen!
- Contact your MQ/CC Project Manager(s) with questions

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# Q&A

**Thank You!**

# Optimized Delivery 2014

Enhancements to the Research Process Associated to MQs  
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