

## Vendor Briefings: Advice for Vendors

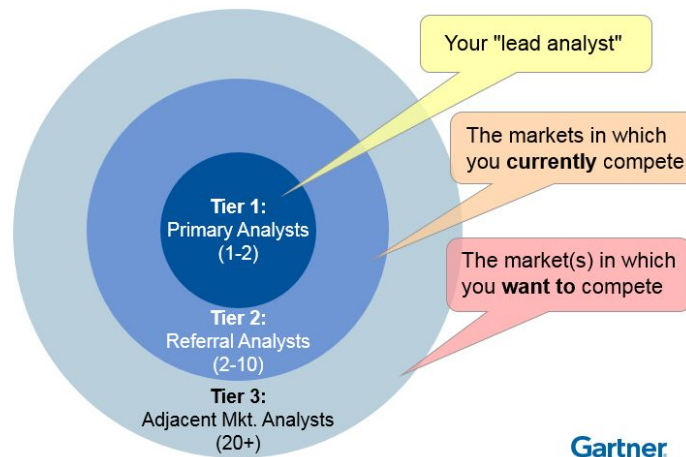
Vendor Briefings are research tools for experts, and opportunities for IT vendors to present its products, services and business strategies. During a vendor briefing, the flow of information is one-way – from the provider to the analyst.

### Do:

- Remember that Vendor Briefings are **ON THE RECORD**.
- Remember, analysts participate in many more briefings than you do, so they may ask you to speed up or refocus your presentation. Do not be shocked by this, and be prepared to either comply with the analysts' requests or explain why your presentation path makes more sense.
- Make sure you tell the analyst:
  - What your company does and why it is worth investigating;
  - Why your customers buy your product or service / what business problems your product or service solves;
  - What differentiates your product from other products and services;
  - Noteworthy customers and why they are noteworthy, if you have approval to share this and it does not violate any previous NDA restrictions;
  - What problems you can solve better than anyone else;
  - Whom do you compete with and who competes with you;
  - When will you complete your next important milestones;
  - Where is your "sweet spot"? / Where are you at your best;
  - Where is your unique value prop; and
  - Who are your competitors?
- Provide:
  - A video demo of your product showing its capabilities, if applicable, or if relevant to the briefing.
  - Examples and case studies that are representative or name clients that are in the public domain and that you have permission to share. Make a checklist about how to disclose your customer list and be attentive to your customers' NDAs.
- Know that all briefings are recorded for playback for all Research & Advisory associates to review.

## Don't:

- Expect analysts to give feedback on a Vendor Briefing. Analysts may ask clarifying questions, for example to better understand a product feature or function, but the flow of information is **one way**.
- Mark your presentation confidential. Gartner will not treat the presentation as confidential and will ignore the designation.
  - In very rare situations, when answering an analyst's question, you may feel you need to provide confidential information to the analyst to respond. In those circumstances, you must pause the briefing, and alert the analyst to this. If the analyst(s) agree(s) to keep the information confidential, realize:
    - Gartner will maintain this confidentiality for up to 45 days, and analyst(s) may use this information in research in an anonymized format thereafter.
    - Analyst(s) may share the information with other relevant Gartner employees who also will be bound by the 45-days confidentiality obligation.
- Focus on one analyst. Analyst's interest may vary, so it is better to brief multiple analysts in adjacent fields. Seek to inform all relevant analysts covering your applicable Mission Critical Priorities. Consider this diagram when scheduling a briefing:



**Disclaimer :** *Vendor Briefings are on-the-record briefings where vendors inform Gartner analysts about their products, services or strategies. Gartner is not required to keep any materials shared in the briefing confidential, regardless of confidentiality disclaimers in any presentations or materials (written or oral), unless otherwise this has been specifically agreed to by Gartner orally or in writing. If vendors want to share confidential information during a Vendor Briefing, they should ensure in advance that the Gartner analysts inform them that they are willing to accept it. If a Gartner analyst will not agree to receive the information, vendors should not present it in the briefing.*