



# Dealing with Analysts

(According to one analyst)

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*August 25th, 2010*

# overview, for readers

This presentation is targeted at PR, AR, and other people who work on the “sell-side” with analysts. The focus is primarily for “vendors” who want to curry influence & do work with analysts, not “buyers” who want to use analysts as input for their own evaluations, procurement, knowledge, etc.

The focus is on being tactical and getting things done/ from analysts, not defining the role.

--Coté



# hello!

- RedMonk is an industry analyst firm
- Broad focus on software, developers, “makers.”
- Bottom-up-approach to understanding software
- Our research is **free** at **RedMonk.com** - text, podcasts, videos, etc.
- We work mostly with vendor advising, and consulting
- Not a “traditional” firm

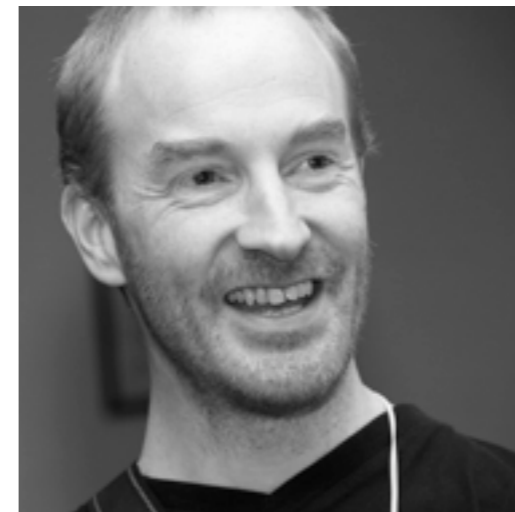
Michael Coté



James Governor



Stephen O'Grady



Tom Raftery



# which analysts?

- IT analysts
- Buy Side vs. Sell Side.
- Industry Analysts & other “influencers.”
- Most of this is from the perspective of vendors.
- Not dealing with financial analysts.



“IT analysts produce crap”

\* [ITSkeptic.com](http://ITSkeptic.com)

 **RedMonk**

# what do you want from us?

- Hard Marketing: social artifacts, speaking, quadrants & waves, lots of lead-gen.
- Soft Marketing: “influence,” short-listing, coverage.
- Advice: strategy, networking, help, bouncing ideas off of.

**Collateral,  
influence,  
advice**



# your goals

1. Make us think The Company is rad
2. Get help making The Company rad
3. Make us talk about that radness
4. Access to our influence channel
5. Access network of contacts & partners
6. Manage/gate-keep client relationship
7. Tell us about rad things

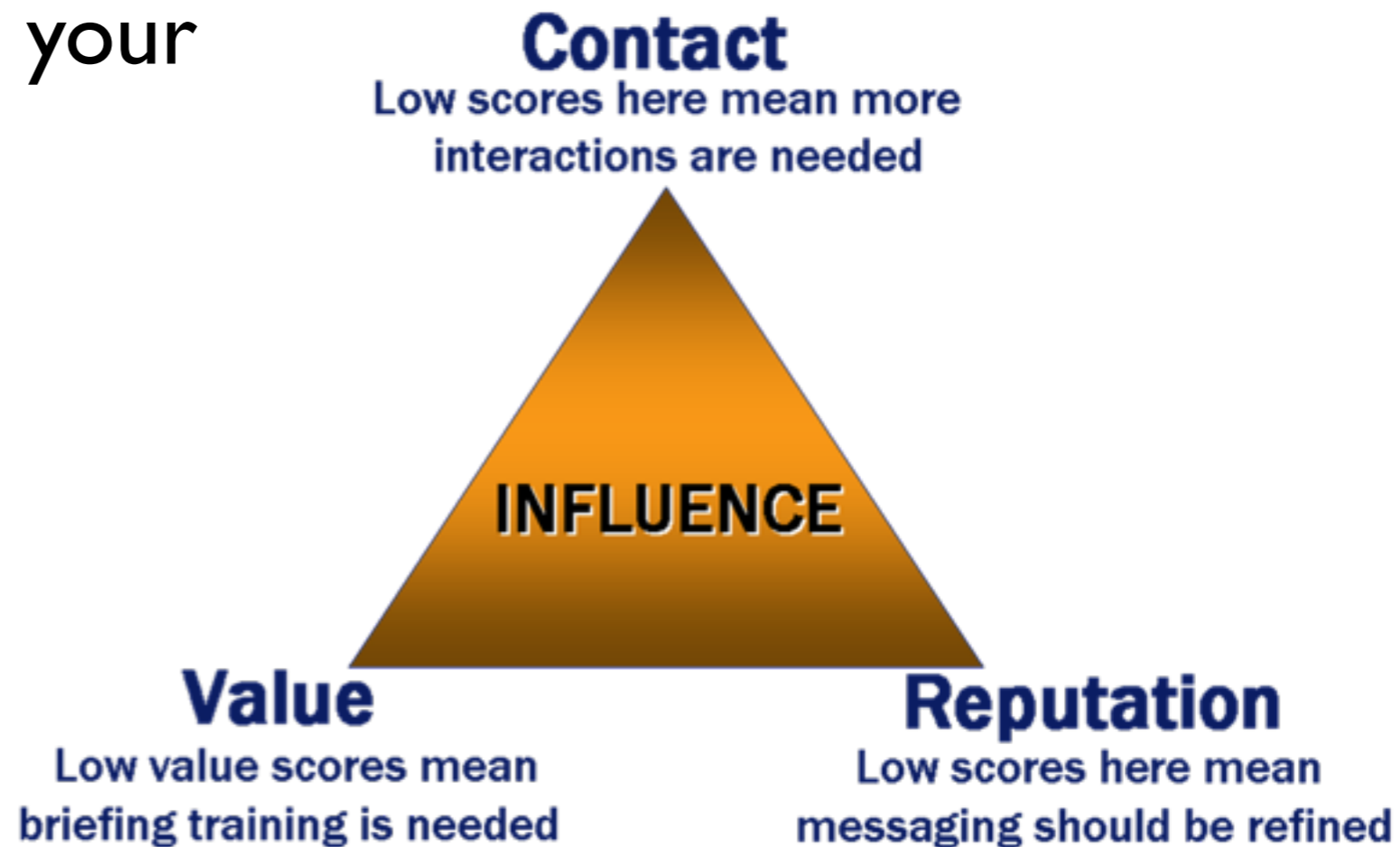


\* You're this guy.

 RedMonk

# an analyst program

- Match analysts' areas to your "product"
- Keep them informed
- Track their influence
- Consult with them



\* Jonny Bentwood, Edelman

# sorting analysts

- By area, available time
- Potential impact - “influence”
- Cost
- Cynics vs. Optimists
- BigCo vs. “independent”



*Hang  
in  
There!*

# tracking

- Simple link-back, press quotes
- Twitter and such
- Inbound links
- Google ranking - by topic
- Surveys, procurement anecdotes
- Changes to marketing and portfolio

Sources	Results	Authors	Results	Vendors	Results
People Over Process	90 (21.2%)	Michael Cote	90 (21.2%)	Microsoft	167 (39.4%)
tecosystems	41 (9.7%)	Stephen O'Grady	41 (9.7%)	IBM	161 (38.0%)
Monkchips	38 (9.0%)	James Governor	38 (9.0%)	Google	130 (30.7%)
IDG News Service	25 (5.9%)	Chris Kanaracus	21 (5.0%)	Oracle	103 (24.3%)
LinuxInsider	17 (4.0%)	Katherine Noyes	20 (4.7%)	Amazon	79 (18.6%)
The Open Road	14 (3.3%)	Matt Asay	16 (3.8%)	Twitter	68 (16.0%)
InfoWorld	14 (3.3%)	Paul Krill	14 (3.3%)	VMware	66 (15.6%)
Application Development Trends	11 (2.6%)	John K. Waters	11 (2.6%)	Apple	61 (14.4%)
Boycott Novell Blog	7 (1.7%)	Jeffrey Schwartz	8 (1.9%)	Facebook	49 (11.6%)
SD Times	7 (1.7%)	Roy Schestowitz	7 (1.7%)	Apache	48 (11.3%)
SearchSOA.com	7 (1.7%)	Savio Rodrigues	6 (1.4%)	Adobe	39 (9.2%)
Cloud Ave	6 (1.4%)	Dennis Howlett	6 (1.4%)	Dell	37 (8.7%)
Open Sources	6 (1.4%)	Rob Barry	6 (1.4%)	SAP	37 (8.7%)
Redmond Developer News	5 (1.2%)	Krishna Subramanian	5 (1.2%)	Blackspace	36 (8.5%)

zEnterprise  Search

About 528,000 results (0.42 seconds) [Advanced search](#)

**IBM zEnterprise System** Sponsored link

[www.ibm.com/systemz](http://www.ibm.com/systemz) A New Dimension in Computing for Today's Growing Demands. See Latest

[IBM Press room - IBM Unveils zEnterprise, New Systems Architecture ...](#) ☆  
 Jul 22, 2010 ... IBM Press Room - IBM today announced the zEnterprise mainframe server and a new systems design that allows workloads on mainframe, ...  
[www-03.ibm.com/press/us/en/presskit/32145.wss](http://www-03.ibm.com/press/us/en/presskit/32145.wss) - [Cached](#)

[Coté's People Over Process » IBM's New zEnterprise – Quick Analysis](#) ☆ - Aug 12  
 Jul 22, 2010 ... IBM presented much information on Total Cost of Ownership (TCO) for the new zEnterprise vs. x86 systems (or "distributed" for you ...  
[www.redmonk.com/cote/2010/07/22/ibmzlaunch/](http://www.redmonk.com/cote/2010/07/22/ibmzlaunch/) - [Cached](#)

[IBM's zEnterprise architecture makes mainframes cool again, also ...](#) ☆  
 Jul 23, 2010 ... There's a good chance you think mainframes are about as cool as pocket protectors, your parents on Facebook, and COBOL... the latter of ...  
[www.engadget.com/.../ibms-zenterprise-architecture-makes-mainframes-cool-again-also/](http://www.engadget.com/.../ibms-zenterprise-architecture-makes-mainframes-cool-again-also/) - [Cached](#)

**Videos for zenterprise**

[What is IBM zEnterprise System?](#)  
 3 min - Jul 21, 2010  
 Uploaded by IBMSystemZ  
[www.youtube.com](http://www.youtube.com)

[IBM® zEnterprise™ System Announcement Overview](#)  
 2 min - Jul 19, 2010  
 Uploaded by IBMSystemZ  
[www.youtube.com](http://www.youtube.com)

[IBM's zEnterprise 196 CPU: Cache is king • The Register](#) ☆  
 Jul 23, 2010 ... Thursday, in launching the new System zEnterprise 196 mainframe, IBM didn't say much about the feeds and speeds of the new quad core ...  
[www.theregister.co.uk/2010/07/.../ibm\\_z196\\_mainframe\\_processor/](http://www.theregister.co.uk/2010/07/.../ibm_z196_mainframe_processor/) - [Cached](#)

[IBM launches zEnterprise 196 'data center in a box' • The Register](#) ☆  
 Jul 23, 2010 ... IBM has launched its next-generation System z mainframe, the zEnterprise 196. Now we will get to find out, in the next few quarters or so, ...  
[www.theregister.co.uk/2010/07/23/ibm\\_zenterprise\\_196\\_launch/](http://www.theregister.co.uk/2010/07/23/ibm_zenterprise_196_launch/) - [Cached](#)

[IBM's new mainframe, the zEnterprise 196, is a leviathan ...](#) ☆  
 Jul 22, 2010 ... Every new IBM mainframe says something about the times we live in, and today's latest mainframe release is no different.  
[www.computerworld.com/.../IBM\\_s\\_new\\_mainframe\\_the\\_zEnterprise\\_196\\_is\\_a\\_leviathan](http://www.computerworld.com/.../IBM_s_new_mainframe_the_zEnterprise_196_is_a_leviathan) - [Cached](#)

[IBM zEnterprise mainframe embraces Unix and Linux](#) ☆  
 Jul 23, 2010 ... The IBM zEnterprise 196 mainframe supports Unix and Linux running on IBM Power and x86 blade servers.  
[searchdatacenter.techtarget.com/.../0,289142,sid80\\_gci1517204,00.html](http://searchdatacenter.techtarget.com/.../0,289142,sid80_gci1517204,00.html) - [Cached](#)

[IBM Redbooks | IBM zEnterprise System Technical Guide](#) ☆  
 This IBM® Redbooks® publication discusses the IBM zEnterprise System, an IBM scalable mainframe server. IBM is taking a revolutionary approach by ...  
[www.redbooks.ibm.com/redpieces/abstracts/sg247833.html](http://www.redbooks.ibm.com/redpieces/abstracts/sg247833.html) - [Cached](#)



# *your* clients

- Startups - usually forget they “have” analysts.
- Medium - all over.
- Large companies - in-house AR.
- Expectations tactical - being proactive could be a win.

**What is your client’s knowledge and ability to use analysts?**



tactical stuff



# we're not press

- Timely publishing not such a big deal...mostly
- Though: we're often quoted by press as "expert"
- We keep secrets, embargoes, NDAs, etc.
- Quality of influence over quantity
- Tip: tell us you're "AR," not "PR" or even "PR/AR"

**Analysts keep secrets.\***

\* If you ask us to



# figure out how we make money

- Be aware of when engagements should be commercial vs. free
- Cost out becoming a client and value that gets The Company
- Tip: use our revenue models to motivate us



# engagements

- Online - Email, IM, Twitter, blog comments, links
- Briefings - 60 minute phone/ Webex presentation
- Conferences - 1:many, 1:1, piggy-back, dedicated
- Opportunistic face-to-face
- Drinking & Eating



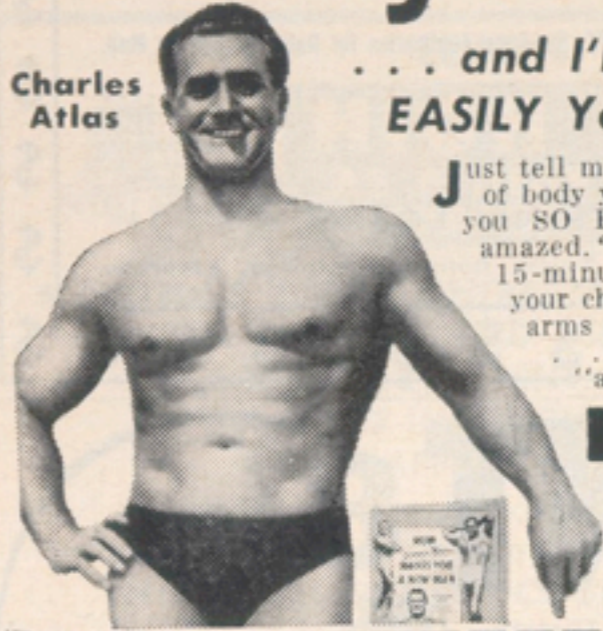
# the presentation

- Viability, maturity
- Customer adoption
- Try a demo
- Explain, don't defend
- Avoid too much "market context"
- Avoid mom & apple-pie

BOOKLET DEPT. C-3, PORTLAND 12, OREGON

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<input type="checkbox"/> Broader Chest, Shoulders	<input type="checkbox"/> Powerful Arms, Legs, Grip
<input type="checkbox"/> More weight—Solid—in the Right Places	<input type="checkbox"/> Slimmer Waist, Hips
	<input type="checkbox"/> Better Sleep, More Energy

Send me absolutely FREE a copy of your famous book showing how "Dynamic Tension" can make me a new man—32 pages, crammed with photographs, answers to vital questions, and valuable advice. No obligation.

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CITY . . . . . ZONE . . . . . STATE . . . . .

In England send to: Charles Atlas, Chitty St., London, W. 1

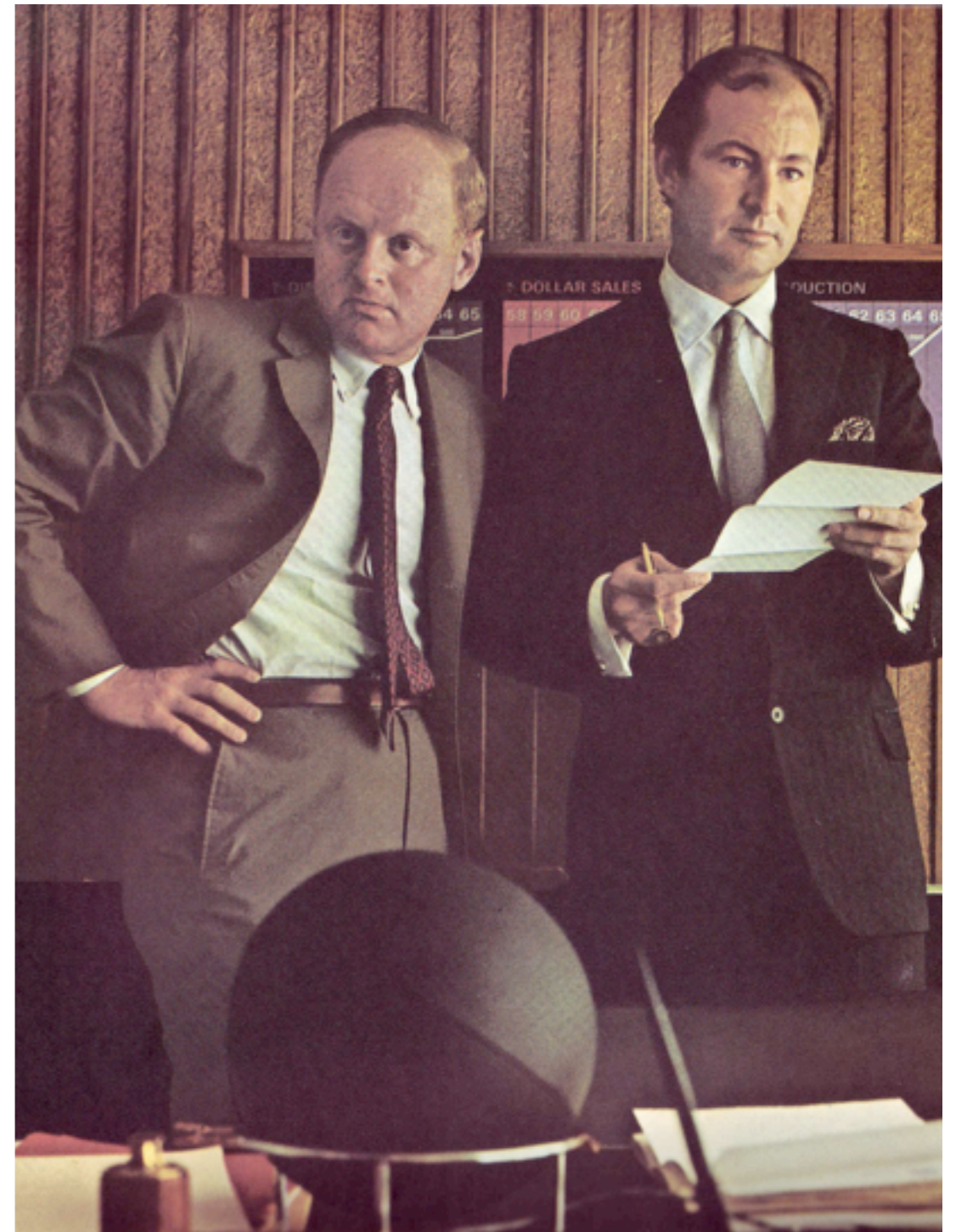
# the presentation - startups

- Not a VC pitch
- Being slick & pro stands out
- Sustaining money, revenue
- Cycle: disruptor, SMB, Enterprise
- Teach them about analysts
- Why will it make money? (Or get bought?)

**Very little time  
analysts, sometimes  
skill, to deal with  
analysts**

# the presentation - BigCo

- Adopting new technologies, ideas
- Keep it short
- Tech/marketing disconnect
- Crush with revenue, usage
- Dangle money
- Why will it work this time?



# social artifacts/work items

- Papers - branded vs. ghostwriting
- Private research/memos
- Webinars/Speaking - context setting
- New Media - screencasts, videos, podcasts
- Hook-ups

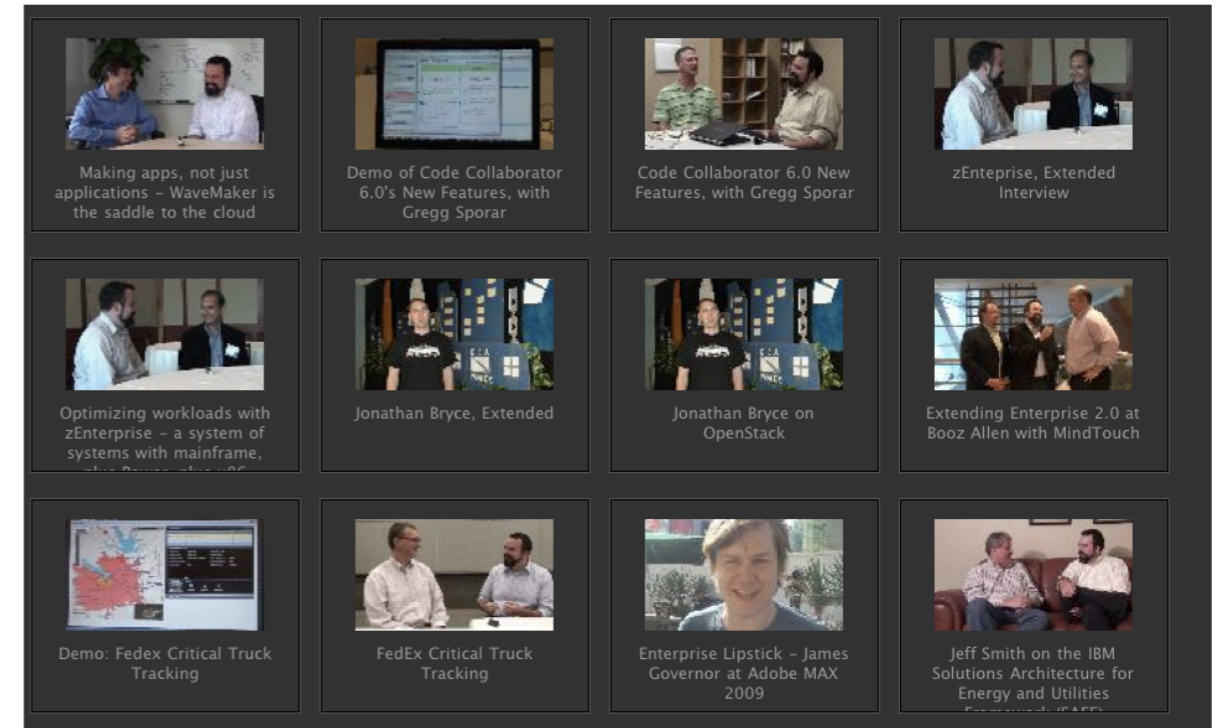
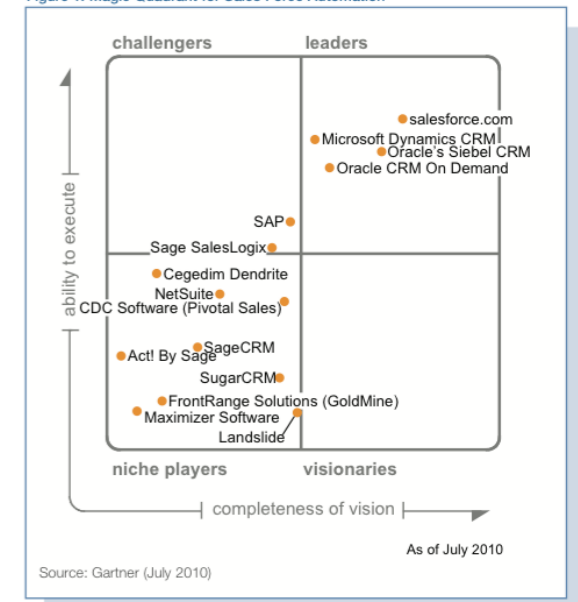


Figure 1. Magic Quadrant for Sales Force Automation



# consulting

- Survey - What's going on out there?
- Tactical Strategy - How do we make money with this technology? Build adoption? Are our methods good? (E.g., going open source).
- Big Strategy - Portfolio management, corporate, future plans.
- Planning - new ventures, waking up dead ones.
- Validation - Is the “offering” itself good? Are we drinking our own Kool-aid? How is it?
- Biz-Dev - Who else should we be working with?
- Messaging - How do we say this? Bullet-proofing.
- Sometimes, a company won't listen to its own good ideas, but will listen to those same ideas from an analyst

**Getting a 3rd party perspective, input, & crafting**



# Thank you!

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## Contact

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512.795.4307



# more resources

- IT Database: <http://www.itdatabase.com>
- SageCircle: <http://sagecircle.com/>
- IBM's John Simonds - <http://johnsimonds.com/category/analyst-relations/>
- 2007 tips from Côté: <http://www.bnet.com/blog/pr/dos-and-donts-for-analyst-briefings/103>
- Johnny Brentwood: <http://technobabble2dot0.wordpress.com/>  
- esp. older, pre-Twitter posts



# Credits & Co.

- Chokey the Chimp & The IT Skeptic: <http://www.itskeptic.org/taxonomy/term/129>
- Influence triangle: <http://technobabble2dot0.wordpress.com/2007/05/09/how-to-improve-analyst-perception/>
- Vintage scans: <http://www.flickr.com/photos/bcostin/sets/471853/>
- Presentation originally given to Porter Novelli Austin in 2008, & then Jones-Dilworth in 2010.