



## Use and Abuse of Analysts

A guide for Vendors

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## 1 Overview

The analyst community in Europe has grown over the past 10 years to comprise of a few hundred people involved in multiple forms of analysis – from creating market forecasts, through creating comparative reports, to strategic advisory work within vendors to carrying out advisory consultancy projects with end-users. Ten years ago, the main choice for users and vendors alike was between Gartner Group and META Group – the two largest retainer-based global advisory companies then – and IDC, Dataquest and a host of other “numbers” houses.

As the analyst world has changed, the choice of analysts types and companies has also changed – there are now many other retainer-based and non-retainer based companies, most analyst houses offer consultancy services of one kind or another, there are analyst companies that specialise in highly specific niches, as well as a host of single person companies making a living from a well defined customer base.

For vendors, the problem is clear – how to minimise their expenditure on the analyst community while ensuring the best coverage of their company with the correct prospect/customer base.

For many vendors, this seems to lead to only dealing with the “big names” (Gartner, Forrester, IDC) – but many other vendors have found that a “balanced portfolio” of retainer and more tactical analyst investments can provide them with a better insight into their target markets in the European and Global geographies.

For many other vendors, working with analysts is a new area, and knowing how an analyst works, what the analyst’s real influence is and how to work with an analyst can be confusing.

This document attempts to set out a viewpoint of how vendors should look at working with industry analysts. The authors come from a background of being end-users, being an IT Project Manager working with analysts, being in sales and management working with analysts, having been analysts with large global analyst houses, with small UK-based analyst houses and in the starting up and running of a now influential analyst company.

## 2 What an analyst does

Analysts are market influencers. Rarely will an analyst create a sale for you, but they will often stop a sale. Analysts are far stronger in providing negative input than they are in providing positive input. Therefore, your aim as a vendor is to minimise the chances of negative comments from an analyst, to ensure that the analyst is well briefed and is honest about your product, and that you are forewarned of any negative comments that an analyst may make, so that you are prepared for dealing with any impact. Analysts can also create a generalised mindset in the market – for example, that Linux is already a major play in the enterprise, that a suite approach is better than best of breed, that the mainframe is dead. Such generalisms are not true for all people (and are often not true at all) – but can create extra work for you as a vendor in getting past the market perception set.

Analysts will be influential in many ways. The most influential way is in direct dealings with specific end-user customers. Often, you will be able to find from the end user which analyst comments have swayed them one way or another. However, in many cases the person you are talking to will want the “knowledge is power” ethos to be seen to be working, and will deny that any external influences have been brought to bear. In these cases, your own knowledge of the customer, which analyst houses you know they deal with, the types of media the customer is likely to have been reading and the reasons they provide for a decision may enable you to identify who has been the influencer.

The next means of influencing is via written output. In many cases, this will be via retainer service collateral – Gartner Notes are prime examples – which are issued to all service clients on a regular basis. These reports are generally short (1000 words or so) and have to attempt to provide information for clients ranging from heavy manufacturing through pharmaceuticals

to aerospace – an almost impossible job. Often, it is best to deal with this output on an exception basis only – most comments will be relatively harmless and can be dealt with on a basis of “that comment doesn’t apply to you”. Only where a definite mistake of accuracy and reality leads to a massive point of mis-information should you look to taking the analyst house to task. Bespoke reports for customers are harder to identify and are harder to deal with. The analyst will be working against a defined infrastructure, to defined business needs and against known political agendas – and if a negative recommendation is made within such a document, it will be very difficult for you to fight this.

Also, Quocirca warns that there are certain analyst companies in the market who will write positive vendor pieces for money. This is incredibly self-serving, and mitigates against any possibility of analyst independence. The end user community are, on the whole, aware of this, and using any company that will provide a strongly biased piece of vendor output should be avoided.

Next are press articles. In the majority of cases, analysts will write “opinion” pieces. These are generally 800-1200 words long, and are meant to be thought-provoking and provocative pieces. Once out in the public, these comments are difficult to fight, but are less likely to be utilised by your customer base as a strong influence on their decision. However, if a strong error of fact has been made within such a piece, bring the analyst to task and request that they organise that the piece be corrected, and if possible request a retraction to be printed in the title concerned. With the increasing syndication of content, retractions and corrections are becoming more difficult – it is better to ensure that those analysts who are highly active in the press are kept well informed instead.

Analysts are also quoted by the media – and can be very influential through this. A press article backed up by a comment from an analyst can be beneficial – or can be negative. The kind of title that the quote goes through is also crucial – a mention in Computer Weekly, for example, is influential in the technical arena, but will have little impact on the business decision maker. A mention in the Financial Times could heavily impact the business person, but may not even be read by the technical person.

Increasingly, analysts are using blogs as a means of getting their views out into the market. The main difference here is that many blogs are written “of the moment” – an immediate impression of the analyst’s view of what they have seen and heard from a vendor, or an immediate response to some newsworthy event. Whereas blogs originally meant that much of the output was not well thought out, and was riddled with errors, the larger analyst houses and the smaller ones who value their independence and inherent impact on the market will have ensured that their “blogs” are now just as reviewed as the rest of their output. You should also note that the use of blogs is nowhere near as widespread as the media would have us believe, and even where blogs are read, the content is often regarded as of much lower importance than a fully reviewed and published article or report. With over 60 million blogs now in existence, reading the blogosphere becomes tedious in the extreme very rapidly.

However, there will be certain blogs which get a lot of syndication, are read by the media and so gain visibility and credence in the end user environment. Again, it is important to understand which bloggers are influential, and to ensure that they get the information they need to be able to represent you correctly in their postings.

It is also important to realise that despite the image of someone working away in isolation on a piece of research, analysts have a massive network of direct contacts, and during the course of a month will meet or have conference calls with dozens of people in many other vendor companies. While the numbers involved are far fewer than those accessing reports or reading media comment, the levels of seniority will generally be very high, and often strong relationships are established. These one to one meetings and briefings, where market insights are shared from a neutral standpoint are another way in which analysts play an influential role across an industry sector.

Lastly, public and private presentations are highly influential platforms for analysts. A good presenter can plant thoughts into an audience’s mind that will impact their future decisions.

Most analysts will only present in an independent manner, providing an overview of a market along with an evolutionary vision. Analysts who provide strong backing for a specific vendor are not perceived as being independent by the audience, and will therefore have limited influence.

The majority of business analyst companies have now moved to an “analyst consultant” model, where dealing with the end-user community is now seen as being project based (and therefore revenue generating), rather than just a part of the retainer service. Therefore, more time is being spent with the end-user community – and therefore the analysts’ influence is growing.

### 3 Analyst “Tiering”

The majority of vendors will need to tier their analysts. There are over 100 active analyst companies across Europe, and trying to deal equally with each of these that cover your area of expertise will be too time consuming and costly.

The most common form of tiering is based on the perceived overall power of the analyst company. With global brands such as Gartner Group, Forrester and IDC, the brand itself carries enough strength such that pronouncements from the company are already seen as being influential – no matter who within the company has made the statement. These global companies are placed within Tier 1. However, within certain geographies, there will be strong brands with a high degree of influence. Therefore, in the UK, companies such as Quocirca are seen as being Tier 2. Then there are analyst companies with strong domain expertise who can demonstrate strong influence within specific markets, such as Cambashi and Sodan, who are often placed in Tier 3. There is also a growing band of one-man band companies – some with domain expertise, some who attempt to cover larger swathes of the market, and maintaining track of these individual’s market impact can often be very difficult. The main problem with this kind of tiering is that Tier 1 is naturally seen to be better than Tier 2 and Tier 3. This is not necessarily so, and you need to ensure that you have a good mix of contact with analysts across your needs.

Similarly, the above named analyst companies are all based on business and/or technology analysis, whereas there is a whole raft of other analyst houses dedicated to market analysis. In this area, Gartner (via Dataquest), Datamonitor and IDC are the three biggest Tier 1 players, with the likes of Quocirca, Canalys and Context as Tier 2. There is a large raft of Tier 3 players, and many times companies will utilise existing business market research companies to carry out a degree of technical market research. Within the market research area, you must also differentiate between those who are numbers focused (“the market for x will be \$y by z” – e.g. Dataquest, IDC and M:Metrics)), and those who provide market analysis (“decision makers state that they will be spending \$y on x during z through channel a on products b and c” – e.g. Quocirca, MWD))

A better form of tiering is through deciding whether an individual analyst is important to you. This may be that you find a good analyst in a global name, or that you find an excellent analyst in a Tier 3 company – but that you feel that this person can be both influential and useful in your area. In this way, you should be able to define anywhere from 1 to 6 analysts who you involve with what you are doing, being more open than with other analysts, and bring them in as close to the start of any decisions as possible. On the whole, this will involve having a commercial relationship with the company. These analysts will be your “A” team analysts. Next will come those who you see as being influential, but not particularly useful to you or easy to work with. These analysts will still need briefing well before you brief the press, and will be your “B” team analysts. Then come those who cover your area, but who are not seen as being highly influential or useful. These will need a degree of pre-warning of announcements before the press are briefed, but can be seen as being “C” team analysts. The rest of the analyst community, not covering your area and not being seen as influential or useful, can be simply disregarded.

Tiering of analysts is not something that can be bought or found through peers – it requires work from your part to identify those analysts that you like and feel are important. Certainly,

an agency, especially one specialising in Analyst Relations, or a peer can point you in the right direction (particularly around existing perceived influence) but working with analysts often comes down to personal relationships – and this is only something that can be borne out through time.

## 4 Analyst topics of coverage

There are different ways to view both companies and individual analysts based on the topics they cover. Some will provide in depth knowledge and understanding on a very narrow field, such as a type of technology or a set of product types. All the vendors they talk to are in the same sector, will be relatively known in number so they have the opportunity to develop close relationships with the analysts, who will develop strong comparative understanding of the offerings in that sector. These analysts can be very useful when developing and launching new products or services as they can provide an understanding of the directly competitive landscape. They often provide influence to clients who have made a decision to invest in a product or service and are looking for direction to set selection criteria and as they make their choices.

Some smaller analyst companies focus on one area in this way, and in the larger companies, it might be a department, team or even an individual who has the narrow, but deep insights in a specific area. This works very well in established markets or technology areas, where change is more incremental, and follows more predictable patterns.

An alternative approach focuses more on the challenges from the end user or purchaser perspective, and less on the specific technology. Analysts and companies that take this approach will generally meet with a great number of different types of technology vendors, so will often not want get too close to the technical details. The questions are more about what will this mean, who will use it and why, rather than how does it work? As well as considering direct competitors, they will be taking a view of the broader market and industry trends, and how these will create more indirect competition in the market. This insight can be useful for companies who are setting a broader strategic direction, looking at how to develop new product lines and services, or expand to new geographies or customer segments. It can also be very useful for those bringing new and disruptive concepts or products to market.

## 5 Analyst Reach

Another area to look at is the audience an analyst or company can reach – this can be through specific focus (local, regional, global), branding or output. The historical analyst model of retainer customers, where only those subscribing to an analyst company gain access to their output, is now only valid for the largest analyst companies – and even these are beginning to review the model. The big problem with retainer-based services is that the ubiquity of the internet has given a large boost to the perception that the answer is available on the internet, somewhere, free of charge.

Many of the newer analyst companies have a “free” distribution model – whether this be through an agreed open distribution model, a creative commons licence, or similar. In most cases, the business model revolves around specific vendors paying for research to be carried out into a specific area. The vendor gains insights into this area through analysis of primary and/or secondary data sources, giving the vendor the “need to know” information. An external report can then be created which provides insights to end users on what is happening within this technological area – and as distribution is so easy these days, the report can be given away, free of charge, either to an opt-in distribution list, or via direct download of the report, generally requiring registration. Therefore, many of the newer analyst companies will have their own subscription list that they will be able to discuss the size and global reach of with vendors – and this should be borne in mind when looking at how far the output from the analyst company will reach.

Also, many of the analyst companies are now making the most of the reach of the internet, and have agreements with portal companies to promulgate the reach of their output. For

example, many of the smaller companies make use of IT-Analysis to re-publish articles and reports, and some make use of larger media outlets, such as CNet (silicon.com, ZDnet, techrepublic, UK Builder), The Register and others, to carry their reports to a much greater audience. In many cases, this means that a small analyst company will have much greater reach to a target audience than a larger analyst company – for example, very few small and medium companies take paid analyst output, and depend on what is available on the internet for help with decision making. Even in larger companies, where the price of a particular report might be less of an issue, there is no guarantee that the person purchasing the report will share it widely, or place it in a company library for everyone to access. Without suitable direction or compulsion, there's no guarantee that other employees of large organisations will look internally first, so the Internet will very often be the first port of call.

## 6 Specific Analysts

Each analyst company will have a range of analysts within it, and it will not always be easy to ensure that you are talking to the main influencer within that company. However, any vendor that always demands to talk to a specific person within an analyst company will be perceived as arrogant, and so will perpetrate a negative perception. However, if you have a major announcement to make, we feel that it is incumbent upon the analyst company to show that they take you seriously, and that the most senior analyst covering your area should be made available. If you feel that you are being faced with a junior analyst, provide the minimum amount of information required to get your major points across and then request a meeting with a specific named analyst. However, you must realise that what may seem important to you may not actually be important in the greater scheme of things, and you may have to feel your way in the early days to understand that another change in your product does not rank with the announcement of a multi-billion dollar merger of two major IT companies.

Building relationships within the analyst community is key – an analyst who knows your company, its products and the people he or she deals with will be far more likely to provide insightful, constructive criticism than someone who has just come across your company. However, do not expect analysts to court you – the calls on our time for vendor briefings are high (the author had over 300 vendor meetings in 2006), and we will only chase you when we need information for a specific report, article, or for a customer's request. You need to ensure that the analyst is kept well informed, and kept informed in the manner(s) which they require.

## 7 What an analyst needs

An analyst's main requirement is for enough information to represent themselves correctly in the market place. To do this, we need to have enough knowledge of the market and the players in that market to be able to talk cogently about that market and to provide high-level advice to an end-user. Whereas a positive comment from an analyst can be seen to augment your internal marketing, the analyst is not there to provide the hard sell, nor to be an out-and-out expert in your product. The purpose of the analyst is to help a person reach a decision – and this can be done through a reasonable high-level knowledge of your company, your product(s) and your go to market strategies. The analyst must, within the realms of all possibility, be as independent as possible – but will not be able to position your company well if they have had little to no contact with you in the past.

Therefore, it is important that you brief analysts to ensure that you do get talked about and represented when the analyst is out in the end user and public arenas. However, calling in an analyst and showing us a copy of a marketing presentation that was shown to the US at a trade show two weeks ago does not constitute a briefing – it is a marketing session, and we can get most of this information from your web sites. A briefing session must be seen as an opportunity from your side – to both get your information across and to gain useful feedback from the analyst.

Again, we must here make a split between analyst approaches. Many analysts will want to know the technical architecture, use of standards and technical evolution of a product,

whereas others will be looking more at the “So what?” side of things – what is it that your product does that will affect an end-user’s business.

Technical analysts will want to compare products, will probably have specific questions that will need answering (and can be obtained beforehand) and will want a product demonstration, with a technical representative on hand to answer questions. Business analysts will want to know what your channels to market are, what your key messages are, who your target audiences are and the benefits your products provide. Business analysts will want to talk to marketing directors, channel directors and product managers.

What an analyst wants from a briefing is to be told the truth – any lies that are found out will help kill your standing within that analyst company. We also want straight answers to questions. We will have briefings under non-disclosure – but don’t overuse this, and ensure you tell us what areas are under NDA, and which areas aren’t. Don’t forget that using analysts to “leak” information into the public domain can be positive – provided that you have ensured that you know what the analyst’s view is first. We don’t mind having a company’s dirty linen washed in front of us – companies that try to tell us that everything is fine when revenues have fallen 20%, profits have disappeared and that 30% of employees have suddenly gone will not be trusted. Those who acknowledge business and technology problems will not only gain credence, but may often get help from the analyst in being pointed in the right direction or introduced to other technology companies who can help fix the problems.

On an ongoing level, we need access to the right vendor employees – at the right time. As we work to deadlines, and often have customers requiring information to short order, we need to be able to get an answer to our requests rapidly – even if it is a qualified answer. Although analysts with strong vendor relationships will know who to go through to, others will need a gateway – whether this be an internal analyst relations person, or an external agency. Whoever is used, their primary role is to act as a facilitator, ensuring that the analyst gets to talk to the right person and that the right information has been imparted.

We don’t want overkill in how you deal with us. Most analysts will be looking at 1 or 2 vendor briefings per week – around 45 – 100 per year. Smaller companies may be working at the 150-250 briefings per year. If you are trying to talk to these analysts once per month, you are eating into their fee-earning capability. Wherever possible, provide low-level information via e-mail, keeping the big stuff for the main briefings. Also, use the technologies that the analyst is happy with. If they enjoy telephone conferences, use that. If Webinars, use that. The more that you are perceived to provide flexibility in how you deal with the analysts, the better the analysts’ perception of you will be.

## 8 What you can expect from the analyst

Unfortunately, we are not charities, and we cannot provide everything free to vendors. However, neither should you be expected to sit there providing information to a “silent sponge” at the other side of the table. Quocirca believes that the following should be expected from an analyst:

### 8.1 “Free”

- Immediate general feedback on a product, its messaging and the business model surrounding it.
- General pointers as to the product’s positioning in the market, its probable competition and market opportunities.
- Feedback on market futures and technology evolution in the vendor’s space
- Immediate comments on any major issues identified during any product briefing or demonstration
- An indication of the analyst’s overall impression, and whether they will be presenting the product and/or the vendor positively or negatively in the market
- An indication of how the information provided will be used

## 8.2 Paid

- In depth information in any area
- Help in creating or tuning market messaging
- Full competitive and/or market analysis
- In-house workshops, training or in-depth discussions
- Written marketing collateral
- External workshops or presentations
- Full market research

Also, if an analyst is going to write a specific report concerning your market where you are criticised strongly should be run past you prior to publication. Although you will have no editorial control over the content of the final document, you should be able to ensure that what has been said is based on supportable facts – not just supposition.

## 9 When to use analysts

This depends on the analyst themselves. Firstly, though, analysts should generally be utilised before the press. Briefing analysts and press at the same time is not good for you – a) the analysts have not had time to think through the true meaning of the announcement, and will not be able to provide a well-thought through quote to the press, and b) your message could be poorly thought out, which could have been picked up by the analysts before it hit the public domain.

However, this does not mean that you should brief all analysts months in advance. Quocirca advises that you involve one or more of your “A” team analysts as soon as you can – this can help to identify possible issues with the thought process, market issues, opportunities, possible alliances or mergers and so on, and will enable an external, independent view to be taken on what you are undertaking. Once you feel that you are ready for testing the market, use the rest of your “A” team and some negative thinkers from your “B” team to test the message/product out on. Only after this has been iterated where necessary should you go to the rest of the “B” team, the “C” team and then the press and the public.

You can utilise your “A” and “B” team analysts to give internal workshops to pre- and post-sales people, enabling them to better understand the market they will be going for, the audiences they will be talking to and the pain points that will be out in the market. Again, this is all required well before you hit the press and the public.

Analysts can be used at product launches as independent commentators to position the importance of the market you are in to the audience’s businesses.

Analysts can be used continuously as market commentators – but only on available information. Bear in mind that if any analyst is breaking another company’s confidences by telling you what they are up to, then they are probably breaking your confidences as well.

It is very easy to get too wrapped up in your own story and viewpoint, forgetting that your competitors will have similar stories to tell. Analysts will be hearing all of these stories, and will be noting the great similarities, as well as the differentiators. Bearing in mind that your prospects will be hearing the same messages, running your message past an analyst first may well provide you with the insights to avoid the pitfalls while building the required differentiators.

## 10 Analyst issues

### 10.1 Can you “buy” an analyst?

In short – no. Those analysts who do sell out to vendors are generally rapidly found out and so become useless as an analyst. There is a perception in the market that only by paying analyst companies large amounts of money will a company get good coverage. Again, on the whole this is not the case, but there is enough correlation between cause and effect to

warrant more of an explanation. If you have no dealings with an analyst company, you cannot complain if you do not get any coverage – although you can (and should) complain if you get negative coverage. If you spend a lot of money with an analyst company, you are probably (hopefully) spending a lot of time with that company attempting to get value for money in your discussions with them – in which case, the analysts involved will be more up to date with you and your products, leading to better coverage. However, with a well thought out analyst relations programme, you should not need to pay to receive the coverage – if the analysts are being kept well informed through the programme, any payments that you make to the analyst company should be immaterial.

## 10.2 What do I do about a negative analyst?

Firstly – ensure that they are completely briefed. If the analyst's view is based on perception, give them the facts – in a positive, open discussion forum and provide them with answers to all of their questions to ensure that they have a full understanding of what is real. In many cases, this will solve the problem. Ask them for their reasons as to why they are negative – this can often open up basic misperceptions that can be dealt with. However, if the analyst remains negative, or has a negative view based on a good knowledge of the company and the product, then you can either shift your efforts within the company to other less negative analysts or complain to the analyst's boss, if you feel that the view is totally unwarranted. In the final situation, should an analyst remain negative and be seen as being influential, ensure that you have spoken to them and have managed to extract all their reasoning from them – and then prepare a counter case against their points for use in the market. BUT – be prepared to accept that the analyst may be right and that you are wrong. If this is the case, you need to make the decision as to whether to carry on regardless, or to work with the analyst (and/or others) to help correct the issues prior to hitting the market.

## 10.3 How do I find the right analysts?

Starting from scratch is not easy, and will rarely be cost effective. The use of an agency will provide you with a database of known analysts and a degree of information as to areas of coverage, degree of influence, personalities, strengths and weaknesses and so on. When a briefing has been set up, ensure that you read the briefing notes provided. Let first impressions count – if you don't like the analysts in front of you, it's possible that many end-users won't either. If the analyst comes across as being "grey", that's how they'll appear to the end-user. If you feel that the analyst is too junior, provide the information that is necessary, and then get the agency or AR person to set up another meeting with a more senior analyst – and ensure that they don't let it happen again in the future. However, do accept that junior analysts will never become senior analysts unless they gain experience. Therefore, junior analysts will have to be in meetings alongside more senior colleagues – but you should not be forced to deal with a junior on their own if more senior analysts could be present.

Use press cuttings and web searches to find out who is talking about you and who is being quoted about you in the press. Either use press cutting agencies, your PR company, or specific companies such as Apollo to do this for you.

## 10.4 Are analysts independent?

Yes – and no. Independence is what makes an analyst company influential and strong. However, we are all human, and we carry around the baggage of our perceptions and our past. If an analyst uses a certain solution in house, they will have a better understanding of its strengths and weaknesses than a product that has been demonstrated or described to them. However, the majority of analysts will try to suspend their own bias when acting on behalf of an end-user, and will attempt to position a solution which is a) right for the end user's business and b) fits in with their existing environment.

## 10.5 How do I interact with an analyst?

Like you do with any other person. Although analysts can appear to be all-powerful (or not, in some cases), this is generally just because we are looking at the world from a different viewpoint. After all, we are not trying to sell an application, nor are we not trying to look

for the best solution for our specific needs. We are paid to look at the bigger picture, and to place smaller pieces of the jigsaw into this picture.

If we say something you don't understand – stop us and get us to explain. If you disagree with us, tell us so and get us to stand our corner. If you want more detail on something we say, ask. Any interaction with an analyst should be viewed as an opportunity – we have a broader view of the market than can be expected from an employee of any single company, and the “free” feedback and discussion you can get with us should not be discounted.

### **10.6 At what point does use of an analyst become abuse?**

Although the opportunities to get “free” advice from analysts should not be discounted, pumping us continuously only for free is not recommended. If you feel that an analyst has got real value to you, then be prepared to pay for it – but be ready to ensure that you get value for money. It is not necessary to pay for a retainer just to ensure that analysts talk to you. Look at internal workshops, discussions sessions, presentations, etc as low-cost ways of gaining solid information from an analyst while ensuring that you do not step over the line of “free” to costed advice.

## About Quocirca

Quocirca is a primary research and analysis company specialising in the business impact of information technology and communications (ITC). With world-wide, native language reach, Quocirca provides in-depth insights into the views of buyers and influencers in large, mid-sized and small organisations. Its analyst team is made up of real-world practitioners with first hand experience of ITC delivery who continuously research and track the industry in the following key areas:

- Business process evolution and enablement
- Enterprise solutions and integration
- Business intelligence and reporting
- Communications, collaboration and mobility
- Infrastructure and IT systems management
- Systems security and end-point management
- Utility computing and delivery of IT as a service
- IT delivery channels and practices
- IT investment activity, behaviour and planning
- Public sector technology adoption and issues
- Integrated print management

Through researching perceptions, Quocirca uncovers the real hurdles to technology adoption – the personal and political aspects of an organisation's environment and the pressures of the need for demonstrable business value in any implementation. This capability to uncover and report back on the end-user perceptions in the market enables Quocirca to advise on the realities of technology adoption, not the promises.

Quocirca research is always pragmatic, business orientated and conducted in the context of the bigger picture. ITC has the ability to transform businesses and the processes that drive them, but often fails to do so. Quocirca's mission is to help organisations improve their success rate in process enablement through better levels of understanding and the adoption of the correct technologies at the correct time.

Quocirca has a pro-active primary research programme, regularly surveying users, purchasers and resellers of ITC products and services on emerging, evolving and maturing technologies. Over time, Quocirca has built a picture of long term investment trends, providing invaluable information for the whole of the ITC community.

Quocirca works with global and local providers of ITC products and services to help them deliver on the promise that ITC holds for business. Quocirca's clients include Oracle, Microsoft, IBM, Dell, T-Mobile, Vodafone, EMC, Symantec and Cisco, along with other large and medium sized vendors, service providers and more specialist firms.

Sponsorship of specific studies by such organisations allows much of Quocirca's research to be placed into the public domain at no cost. Quocirca's reach is great – through a network of media partners, Quocirca publishes its research to a possible audience measured in the millions.

Quocirca's independent culture and the real-world experience of Quocirca's analysts ensure that our research and analysis is always objective, accurate, actionable and challenging.

Quocirca reports are freely available to everyone and may be requested via [www.quocirca.com](http://www.quocirca.com).

**Contact:**

Quocirca Ltd  
Mountbatten House  
Fairacres  
Windsor  
Berkshire  
SL4 4LE  
United Kingdom  
Tel +44 1753 754 838