



# Analyst Relations Playbook

# Purpose

**The purpose of this playbook is to develop and sustain an effective AR program that produces impactful results.**

Our intention is to help you understand each step in the analyst relations process by working with Expert Marketing Advisors. We help you adapt the best practices to your organization by activating your planning and program execution that influences your company's strategic position in the market.



# AR Scope

Expert Marketing Advisors AR scope includes the functions that will strategically influence your brand and market position with industry analysts.

## CORE PROGRAM

- Analyst Relations

## ADDITIONAL

- Influencer Marketing



# Framework

1	Assessment
2	Establish Goals and Objectives
3	Understand Opportunity with Target Audience
4	Craft Message
5	Develop AR Plan
6	Budget and Measurement



# Framework

## 1 Establish Objectives

Company Goals  
(i.e. new category)

Marketing and Communication Goals

Strategy

## 2 Assessment

Analyst audit

AR Opportunities

- Industry analyst targets
- Relevant analyst reports

## 3 Determine Analyst Targets

Sphere of analyst Influence

Analyst tiers

## 4 Craft Message

Map messaging company level and product level

Identify industry analyst trends and predictions and map to messaging

## 5 Develop AR Plan

Develop strategic plan to influence each analyst

- company spokespeople/experts
- Identify marketing resources (customer wins/success stories)

Opportunities to meet influencers

## 6 Measurement

Establish metrics and timeline

Competitive analysis (i.e. customer reviews with analysts, who is top of mind with analyst inquiries)



# AR Maturity Model

## Stage 1: Undefined

No proactive engagement when analyst inquiries occur.

No ongoing formal metrics in place.

## Stage 2: Progressive

Analyst key targets identified but contacts don't know the business yet.

Limited engagement (i.e. meeting at industry events, briefing every six months) but willing to make things happen.

## Stage 3: Mature

Strong analyst relationships; analyst seeks out company experts for research/help with client inquiries

Steady cadence of interaction; the business is experienced with speaking to the analysts on a set schedule

Create opportunities to reach customer target audience; then showcase customer wins/traction with analysts

Metrics are advancing and may include metrics around interactions or relationships with influencers.

## Stage 4: World Class

Some analyst relationships established and there is some understanding of how to build them.

Strong marketing drivers established that support company's position in the market (research, customer wins) which can be shared with analysts as proof points to the business momentum.

AR works very closely with experts/spokespeople to field opportunities; execs are considered a trusted source with analysts.

Advanced metrics exist, AR efforts lead to business impact.



# 1 Establish Objectives

- Company Goals
- Marketing and Communication objectives
- Strategy



# Setting Your AR Objectives

Aligning your AR plan with your company goals and marketing objectives are key to a successful outcome. Expert Marketing Advisors guides you through the process and ensures these are the foundation of the plan. We ensure your AR objectives are oriented around milestones that impact your business.

Examples:

- With the new product launch, increase visibility and awareness of the new product among target demographic of Fortune 100 CMOs
- Drive preference and advocacy for the new product line as a strategic investment for SMBs by being named a leader in the Gartner Magic Quadrant





# 2 Assessment

- AR Audit
- Opportunity



# Assessing Your AR Toolbox

Once your objectives are set, Expert Marketing Advisors work with you to assess your organization's ability to achieve them is the next step: assessing your business' current state of AR: which analyst(s) have the business in their radar and who should you really be influencing. By analyzing the AR readiness of your organization, EMA can work with you to identify challenges and potential solutions that will advance your program.

## Example:

- Key Challenge: Not working with the right analysts to influence your position in the market
- Potential Solution: Identify target list of analysts and analyze their research coverage area/ interests. Determine where your company can benefit from their interest area, and how you can influence them.



# 3 Determine Analyst

- Sphere of analyst influence
- Analyst tiers



# Developing Analyst Targets

Once we have assessed the AR readiness of your organization, we can determine the right strategy to reach relevant analyst targets. This helps identify which industry analysts are a priority. Determining the right influencers and reporters can be attained through tradition and social channels.

## Examples:

- Besides traditional inquiries or meetings, social media monitoring and blogs are a few ways to see what is top of mind for analysts which can help develop the intelligence to reach them.
- Developing a research calendar is another way to determine how to best engage with analysts.



# 4 Craft Message

- Map messaging company level and product level
- Identify relevant industry trends and predictions and map to messaging



# Crafting Your Message

Unlike the media, where it's important to develop a baked message before engaging with them, analysts can be used to test messages before sharing it with the market. This will help determine how well your message may be understood and adopted with your targeted audience in the market. Expert Marketing Advisors can work with you to identify the relevant analysts who may be helpful to craft your messaging at the company and product level. This can help you be competitively positioned in the market. Messaging will impact a variety of AR assets:

Examples:

- AR Deck
- Asking the Right Questions



# 5 Develop AR Assets

- Develop strategic plan to influence each analyst
  - company spokespeople/ experts
  - Identify marketing resources (customer wins/success stories)
- Opportunities to meet influencers (core and extra)



# Develop AR Assets

Developing your AR plan includes taking an inventory of the assets within your organization. This includes subject matter experts that can serve as your organizations' spokesperson. As a spokesperson, your insight will give analysts insight and the confidence in the product and company. Often times, this can mean sharing information/assets under NDA. Additional AR assets that can be used in discussions with analysts include:

## Examples:

- Recent customer wins, stories
- Proprietary research that the community may benefit from, esp. ones discovered through the work of your engineering teams





# 6 Measurement

- Establish metrics and timeline
- Competitive analysis



# Measurement

Now that your program's foundation is in place, Expert Marketing Advisors will work with you to develop measurement results. It's important to track your competitors to see who is influencing the analysts, and what messages from customers are being received. To measure AR, several data points can be used to get a good view into the business impact of the program. For example, the activity input to reach your goal (i.e. the number of inquiries, briefings), the program output (i.e. mentions and placement in analyst reports), and business impact (i.e. prospects or current customers who have, and continue, to purchase your product with analyst input).

Analyst relations measurements can include a variety of metrics to include:

- Product reviews shared with analysts by customers
- Your company's placement in analyst inquiries





# Thank you!

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