

IIAR> Primer: What is Analyst Relations (AR) and the AR job description

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Analyst relations professionals build valuable relationships, turning analysts and influencers into trusted strategic advisors, advocates and prescribers to benefit corporate strategy, influence the brand, shape the product roadmap, and impact the sales funnel.

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KEY TAKEAWAYS

- Analyst and Influencer Relations (**AR**) is **evolving into a more strategic role** by influencing the wider company and brand
- **AR has multiple roles to play** in developing the roadmap, providing an unbiased real-world feedback loop, creating marketing messaging, and helping to train the sales function
- **Analyst relations impact the top line** as the views and opinions of analysts play a key role in multiple parts B2B buyers' decision making process
- Beyond influence, **AR reaches deep into corporate strategic functions** by leveraging analyst insights to align the solutions with corporate messaging and strategy, adjust product roadmaps and even advise on M&A
- **AR professionals needs to be driven by business-goals**, identify the right activities and metrics that will help them achieve those goals and demonstrate benefit to the organisation
- **Building relationships is key** –both with analysts and internal stakeholders who can help to tell the AR 'story' to your organisation

What is analyst & influencer relations?

This IIAR> Primer aims to clearly define the objectives, duties, and challenges of the Analyst Relations role. It outlines a simple and easy to understand template for AR roles across the industry.

Defining the AR role has become more essential as it continues to evolve into a more strategic position. Over recent years, AR professionals are increasingly taking on a strategic leadership role within their organisations by applying analyst insights to develop the roadmap and updating marketing messaging. AR now means developing and maintaining long-term relationships, externally and internally, that help enable organisation to evolve with the market. Although coverage and execution are still a vital part of the role, they now sit within a wider, more influential, strategic framework.

The IIAR> defines analyst & influencer relations as follows:



*Analyst & influencer relations (AR) professionals engage with industry analysts and other B2B influencers on behalf of technology vendors. They **build relationships** with the analyst community and drive conversations about vendors and their solutions to gain strategic insights, **educate analysts** to help them knowledgeably position vendors with their user clients and **leverage analyst research and content** for marketing purposes and advocacy with technology buyers.*

– IIAR> Best Primer: What is analyst relations by Ludovic Leforestier (@lludovic, [LinkedIn](#)) and Trish Valladares ([LinkedIn](#)), August 2021.

What do AR people do?

First and foremost, analyst relations serves both industry analysts and internal stakeholders. This duality is vital to the function: AR brings value by bridging those two audiences and driving alignment via conversations and relationship building. Building strong relationships between your organization and analysts requires a [range of activities that touch on many different aspects of an enterprise](#)¹ that we will explain in further detail below.

Analyst relations outcomes and benefits

The main goal of analyst relations, as [ARInsights](#)² puts it, is to increase awareness and knowledge-sharing between vendors and a vital audience – industry analysts. Ultimately, the aim is to achieve key business goals via the analyst channel - improving your business' reputation, improving your product, and making the right moves in the M&A space to increase revenue and reduce costs.

¹ IIAR> The AR Job Description: <https://analystrelations.org/the-ar-job-description/>

² AR Insights - The Analyst Relations Job Description: <https://www.arinsights.com/analyst-relations-best-practices/the-analyst-relations-job-description/>

For industry analysts, AR is a necessary conduit into vendor organisations to gain the information they require to analyse the market and vendors. AR offers a free service to industry analysts and requires a significant investment (time and staffing) from vendors. Concretely, the AR function organises briefings and summits to inform analysts on the vendor company, its products and solutions, answers analysts questions and fills-in RFI's for major evaluations such as the Gartner [Magic Quadrant](#), the Forrester [Wave](#), the IDC [MarketScape](#), the GigaOm Market [Radar](#), the ISG Provider [Lens](#), etc.

On the vendor side, AR delivers value via the four categories in the [IIAR> AR Compass](#)³, (the IIAR> framework for AR goals), for many internal stakeholders:

- **Strategy:** AR identifies the right influencers to drive insightful conversations to achieve the goals of expanding, tightening or tweaking strategy and refining positioning and messaging using input from analysts for the benefit of top executives and strategy teams, including Corporate Affairs, Corporate Development, the C-Suite and the Board at large, Corporate Strategy, Product Engineering and Product Marketing.
- **Opinion:** AR monitors and drives analyst coverage, both in syndicated and open research, traditional and open media, as well as analysts participation in conferences and industry events.
- **Sales:** AR tracks analysts' influence on vendor revenues, ensures analysts can knowledgeably position current solutions and are aware of the vendors' roadmaps. It can also help with sales training and developing sales tools to help address customer needs more efficiently, and help sales to 'speak the language of the customer'.
- **Marketing:** AR supports marketing and communications with commissioned research, by leveraging syndicated research and analyst authority.

In conclusion, AR professionals manage relationships with technology's very [top influencers](#)⁴, industry analysts, impacting not only the entire buyer journey from awareness to contract negotiation but also short-listing.

- For vendors who employ or contract AR professionals, the benefits are greater than the amount added to the top-line because and act as sounding boards who can help vendors make the right decisions, potentially avoiding fatal or extremely expensive strategic mistakes. They are also trusted advisors who can advise on M&A and roadmap development.
- Analysts also have indirect and direct influence on sales by industry analysts shaping markets, creating categories and speaking directly to B2B buyers. AR enables them to knowledgeably position and recommend a vendor.

In other words, analyst relations is the greatest insurance policy a technology vendor can buy against expensive mistakes.

³ IIAR> The AR Compass: <https://analystrelations.org/2013/05/10/iiar-best-practice-webinar-the-ar-compass/>

⁴ IIAR - Best Practice - Who are Industry Analysts, and what do they do? <https://analystrelations.org/2013/08/27/new-iiar-best-practice-primer-paper-who-are-industry-analysts-and-what-do-they-do/>

How is it different from public relations?

Whilst AR is often portrayed as a communications function, it is different in nature, outcomes and cadence. There are similarities: Both AR (analyst and influencer relations) and PR (media and public relations) professionals are experts at coaching spokespersons, crafting impactful pitches and fine-tuning their messages to their audiences. They're excellent communicators who know how to read the room to react fast.

FIGURE 1: AR VS PR



However, there are several key differences that make them very different functions altogether:

- Outcomes: where PR measures coverage volume, analyst conversations are frequently under NDA and **insights from conversations often matter more than mentions** in research.
- Timeframe: Where PR excels in quick turnaround and crisis management, the results of **AR programs are rarely about immediate gratification** because [analyst research agendas are often set for a calendar year](#)⁵. The cadence of AR campaigns are orchestrated across months, sometimes spanning several years as opposed to reactively.
- Goals: whereas PR is geared towards coverage volume, **AR's focus is on building trusted relationships with analysts** to gain strategic insights to avoid surprises and expensive mistakes. There are [four impact of analyst relations](#): Strategic, Opinion, Sales and Marketing⁶.

⁵ Starsight Communications, The 5 differences between analyst relations and pr –and why you should run them separately, <https://www.starsight.biz/2021/06/28/the-5-differences-between-ar-and-pr-and-why-you-should-run-them-separately/>

⁶ IIAR>, The AR Compass, <https://analystrelations.org/2013/05/10/iiar-best-practice-webinar-the-ar-compass/>

- Metrics: **AR pros measure analyst perception**, movements in major evaluations such as the Gartner Magic Quadrants, the IDC MarketScapes or Forrester Waves, or measurements against competitors such as Share of Voice or Net Market Impact, compared to PR pros who typically measure media coverage volume across news sources (and relative to competitors).

Conclusion

Analyst & influencer relations professionals have the ability to create huge value and their own level of influence internally and externally through their interactions with analysts. The AR role is varied, challenging, and very rewarding within their organisations.

By communicating internally with marketing, product engineering, and the C-Suite, the AR function can shift and improve the company's strategy and roadmap to help keep a vendor's product competitive. Externally, they have the chance to increase the visibility and reputation of a vendor, directly affecting the bottom line.

Who are industry analysts and what do they do?

Industry analysts are top influencers who provide key insights into specific markets and the vendors within them through analysis, research and consulting. They are consistently [ranked in the top 3 for B2B technology solutions and services](#), throughout the decision making process⁷.

- The [2020 IDG Decision Makers Study](#) found that 48% of tech buyers made purchasing decisions based mainly on analyst opinions, and Analyst firms were the most important sources in the evaluation and selection phases of the decision making process⁸.
- [Analyst content is the most important](#) content consumed during the buying process - more so than vendor presentations⁹
- They are thought leaders, creating and establishing new solution categories and with a following that extends way beyond their subscribers
- Some are also strategic visionaries that can provide future vision, roadmaps, ref architectures to senior end-users for longer term planning
- They also influence buyers directly by prescribing approaches and recommending vendors for consideration

The IIAR> definition of an industry analyst:



"An information and communications technology (ICT) industry analyst is a person, working individually or within a firm analysing and publishing research and/or opinions, forecasts, market sizing, on ICT products and services trends, adoption, market-fit, procurement, deployment and/or advising independently technology buyers and vendors and/or providing go-to-market services."

See the [IIAR> Best Primer: Who are industry analysts and what do](#) by **Caroline Dennington** (@CDennington, LinkedIn) and **Ludovic Leforestier** (@lludovic, LinkedIn), August 2013, updated May 2021.

Analysts benefit from a unique vantage point because they speak to all market players, on both the buy side (technology and services users) and the sell side (ICT solutions and services vendors). This in turn makes them invaluable sources of insights for vendors because:

- They routinely give advice on M&A on the vendor side and are part of due diligence for the technology users side.
- Analysts inform product engineering and marketing on roadmaps and positioning
- They provide guidance to communications on messaging and have the ear of vendor C-suites as they provide invaluable market insights and unfiltered feedback.
- They influence the company/brand perception to a wider audience via many routes including social media, market forecasts and competitive intelligence.

Examples of industry analyst firms include:

- [Gartner](#) is the largest analyst firm by far, followed by [IDC](#), [Forrester](#) and [ISG](#).
- [Omdia](#) and [Teknowlogy](#) and [KuppingerCole](#) are good examples of local champions.
- [Constellation Research](#) and [GigaOM](#) both have a wide technology coverage, [451 Group](#) (now S&P) and [ESG](#) are well known in the data centre space, [HFS Research](#) is an independent firm specialising on IT services, [Celent](#) and Aite Group are known in financial services technology and [ZK Research](#) is a good example of an independent analyst.

⁷ IIAR> Best Practice Primer: Who are industry analysts and what do they do?, Caroline Dennington and Ludovic Leforestier, August 2013, updated May 2021, <https://analystrelations.org/2013/08/27/new-iiar-best-practice-primer-paper-who-are-industry-analysts-and-what-do-they-do/>

⁸IDG, 2020 Role & Influence of the Technology Decision-Maker Stud, 10/19/2020, <https://www.idg.com/tools-for-marketers/2020-role-influence-of-the-technology-decision-maker-study/>

⁹ IDG, 2020 Role & Influence of the Technology Decision-Maker Stud, 10/19/2020, <https://www.idg.com/tools-for-marketers/2020-role-influence-of-the-technology-decision-maker-study/>

See also the list of firms and analysts awarded the [IIAR> Analyst and Firm Of The Year](#).

SKILLS



Strategic
analysis



Interpersonal
skill



Project
management

ROLES



Team
Leader



Contractor /
Agency

Contributors

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Appendix: The AR job description

Analyst Relations is a wide-ranging, challenging role, with a remit touching on many different parts of an enterprise. Because AR touches on different aspects of the organisation ranging from product marketing to engineering, it encompasses a wide range of tasks and continues to evolve to include more. Compared to PR, AR campaigns span across several months and managing multiple campaigns at once is common. Whether you are starting an analyst relations program for your organization or onboarding onto an established AR team, AR can seem daunting at first but a career in analyst relations can be very rewarding due to its value proposition in the eyes' of internal stakeholders.

Below we outline what the role can require, how much it can pay, how roles within the AR function change as they increase in seniority and break down AR's objectives.

Senior AR professionals are expected to have deep relationships with as many as 50 analysts and have intimate knowledge of analyst firms' commercial aspects. It's also expected at all levels to hold an [IIAR> certification](#).

Qualities and requirements

The number of AR role levels vary by company and rarely span across the 5 we are presenting here including vice presidents, directors, senior managers, managers, and juniors. The responsibilities and requirements for each role vary and are broken down further in the Job Responsibilities by Levels section. The general qualities required of a [good AR professional](#) at any level are the following:

- Good communication skills - [Building relationships](#)¹⁰ depends on the ability to communicate well
- Project management skills - [Measurement](#)¹¹ is key to success in AR and keeping track of your performance against strict KPIs requires real skill and dedication
- Multi-taskers - Multiple reports, meetings and requirements are all in a day's work
- Thrive in collaboration settings - AR professionals need the support and cooperation of other functions within the business to succeed
- Skilled presenter - Briefings are a fact of life, and you need to nail them
- Normally have a corporate communications or marketing background - It helps to understand a fast-moving, results-driven culture
- Degree in a marketing or technology field
- 3-5 years of experience with a technology vendor
- Managerial experience (with direct reports, an agency, etc.)

¹⁰ IIAR> Best Practice - Who are Industry Analysts, and what do they do?

<https://analystrelations.org/2013/08/27/new-iiar-best-practice-primer-paper-who-are-industry-analysts-and-what-do-they-do/>

¹¹ IIAR> Effective Measurement, Are We There Yet?,

<https://analystrelations.org/2018/06/01/effective-measurement-are-we-there-yet/>

Tasks and responsibilities

Tasks and responsibilities for AR professionals will also depend on level of seniority but the following chart will help to highlight the different categories of activities and the responsibilities associated with each. In general, you and your team should be able to use the following chart as a framework to outline your program's goals and tasks.

	Audience engagement	AR operations	Strategy	Opinion	Sales	Marketing
RESPONSIBILITIES	Identify key analysts and influencers	Deliver briefings, campaigns and events	Monitor research and communicate insights	Communicate analyst research and quotes	Leverage analysts in deals and provide insight to help with language used with the customer	Manage GTM tactics such as commissioned research and webinars
	Create and deliver an engagement plan	Respond to analysts' requests for information	Align long-term schedule to key analyst needs	Alert teams to shifts in analyst sentiment	Work closely with sales to create collateral to boost early prospect interactions	Identify when to buy reprint rights and secure budget
	Author and send regular newsletters	Compile/write newsletters & own analyst events	Develop actions plans to improve market landscape positioning	Explain market landscape scores	Gain leads from analysts advising on enterprise purchasing decisions	Adjust marketing messages to align with prevailing analyst market view

Inspired by: [The Analyst Relations Job Description | Analyst Relations Software](#)¹² by ARInsights.

¹² IIAR> Best Practice Primer: Who are industry analysts and what do they do?, Caroline Dennington and Ludovic Leforestier, August 2013, updated May 2021, <https://analystrelations.org/2013/08/27/new-iiar-best-practice-primer-paper-who-are-industry-analysts-and-what-do-they-do/>

Reporting structure

AR is a transversal function by nature¹³, typically interlocking with a wide range of stakeholders including the C-suite, corporate development, product engineering, investor relations and of course marketing and communications. Each company has its own idiosyncrasies but AR generally is at its best when reporting or at least working extremely closely with Product Marketing and Competitive/Market Intelligence teams.

Advanced AR functions tend to report to strategy or product (22% of IIAR> Salary Survey Respondents¹⁴) though most AR practitioners sit within the marketing department (51%) and 26% are part of a broader communications department.

Compensation and distribution

The value associated with analyst relations translates to your value in terms of compensation at your organisation. In a recent survey we conducted, there were a few interesting findings on recent AR compensation trends:

- **AR salaries have increased significantly over the last decade:** according to the IIAR> salary survey¹⁵, more than 50% of salaries are more than \$175K - in 2010, it was less than 5%
- **Roles are becoming more diverse geographically,** following the pandemic and the sharp rise in US West Coast salary demands - more than half AR roles are now advertised with a global remit
- **US Salaries are 30% higher** at the top end and 50% higher at the low end than other world regions
- Despite their remit and reach, **AR teams tend to be compact** - most have fewer than 5 members
- Experience is more important to salary than qualifications

updated May 2021, <https://analystrelations.org/2013/08/27/new-iiar-best-practice-primer-paper-who-are-industry-analysts-and-what-do-they-do/hey-do/>

¹⁴IDG, 2020 Role & Influence of the Technology Decision-Maker Stud, 10/19/2020, <https://www.idg.com/tools-for-marketers/2020-role-influence-of-the-technology-decision-maker-study/>

¹⁴ IDG, 2020 Role & Influence of the Technology Decision-Maker Stud, 10/19/2020, <https://www.idg.com/tools-for-marketers/2020-role-influence-of-the-technology-decision-maker-study/&Influence-of-the-Technology-Decision-Maker-Stud,10/19/2020,https://www.idg.com/tools-for-marketers/2020-role-influence-of-the-technology-decision-maker-study/aries-significantly-increased-over-decade/>

Job responsibilities by levels

To simplify the job responsibilities of AR professionals, we've highlighted below the key functions expected at each level. While this does not cover every aspect of the analyst relations role, it should help to identify the activities that are expected of you at each experience level.

Some of the boundaries between levels can appear artificial as this is a composite description that includes input from many recent job postings and AR leads at several large vendors including EY, Oracle and Amazon. For example, companies with in-house AR professionals sometimes make distinctions between Directors and Senior Directors while others don't have clear boundaries between Managers and Senior Managers.

In other roles containing an AR element, responsibilities can also vary. Agency teams have business development and client management responsibilities whilst advisor relations can sometimes be a mixed role with analyst relations and almost always has a sales component and targets. In the below descriptions, we will be mostly focusing on responsibilities of in-house AR professionals.

FIGURE 2: THE IIAR> ANALYST RELATIONS (AR) ROLES PYRAMID



VPs

- Set the strategy for how the company engages with industry analysts
- Defines and owns resources requirement –headcount and overall budget
- Sets goals and metrics for progress against those AR goals
- Stakeholders management including delivering insights to senior management

Directors / Senior Directors

- Team management (Senior Directors only in some companies)
- Owns, sets and leads an analyst influencer relations strategy and programme for a coverage area
- Builds and manages relationships with key executives and top 10-20 analysts during key engagements
- Broaden visibility of the company, its strategy, and core products
- Be an advocate for influencers and for the AR team internally
- Identify and coach executive spokespeople
- Develop a spokesperson AR training
- Own analyst summits
- Define and own the peer reviews strategy
- Work with marketing and PR to leverage analysts
- Establish analyst perception audits and all other AR measurements
- Commercial management of analyst firms
- Interlock with other functions such as engineering and product marketing

Senior Managers

- Identify and tier relevant analysts, market luminaries audiences
- Build and maintain relationships with the community of analysts and influencers and act as a single point of contact for this audience
- Plan an AR programme and execute engagement plans
- Deliver a consistent communication cadence with external audiences
- Develop a calendar of activities for stakeholders
- Provide guidance to executives based on analysts and research insights, for instance provide Product Management with strategic consultation on products and services
- Identify and drive participation in evaluations, manage and execute landmark evaluations RFI's
- Compile and disseminate relevant information and customer references to analysts
- Manage internal inquiries and research requests
- Manage AR and company events
- Lead, organise, follow-up, share insights and recommend actions from briefings and inquiries
- Read, digest, summarise and disseminate research coverage and trends internally via newsletters and blogs
- Partner with the field sales and GTM organisation, assisting in driving deals with analyst support
- Collaborate with Product Marketing and Corporate Marketing to deliver content and programmes to drive lead generation

Managers

- Drive engagement plans with influencers including planning campaigns, scheduling briefings, creating briefing documents and circulating briefing recaps
- Manage buddy programmes
- Support analyst summit logistics
- Track and report coverage & interactions inc. notes
- Maintain analyst database for reporting and measurement
- Administer analyst perception audits
- Track, report and disseminate analyst & influencer research coverage and social media commentary internally via blogs and newsletter

Entry-level

- Maintain an analyst database, ensuring that all activities and interactions are uploaded
- Produce internal communications to promote positive analyst rankings and reports
- Support analyst events with internal and external partners

AR objectives

- Ensure fair representation and coverage
- Broaden awareness and visibility
- Create a lasting positive perception
- Position executives as thought leaders with key influencers
- Boost brand awareness and visibility, support revenue growth
- Support product marketing and other stakeholders with analysts insights
- Influence outcomes such as research
- Leverage analyst advisory to drive innovation and strategy
- Positioning for successful selling
- Contribute to sales enablement

AR skills

- Excellent writing skills
- Superior verbal communication and presentation abilities
- Be a master at building and leveraging relationships with stakeholders and external audiences
- Deep product & industry understanding, ability to articulate / evangelise company and solutions
- Organised and attentive to detail
- Project management and planning, detail orientation
- General marketing and demand generation knowledge
- Negotiation and commercial relationship management
- Influencing and persuasion
- Responsive and customer-service attitude
- Event management

- Reference customer management
- Crisis management
- Subject-matter, industry and product/service line knowledge
- Capability to understand contextualize complex concepts (make analyst insights relevant to vendor market, goals, services etc)
- Proficiency with IT/office tools, web and social media tools

AR role requirement

- [IIAR> Certification](#)
- Used to work in matrix requirements, handle stakeholders at all levels
- Self-motivated
- Comfortable operating in complex, matrix environment remotely
- Good general knowledge of the IT industry
- Understand cultural differences, region / country specifics
- Analyst or product marketing/management background a plus
- Travel required 20%+ of the time

About the IIAR>

The IIAR> is a not-for-profit organisation established to raise awareness of analyst relations and the value of industry analysts, promote best practice amongst analyst relations professionals, enhance communication between analyst firms and vendors, and offer opportunities for AR practitioners to network with their industry peers.

Membership is open to everyone in the analyst relations community. To find out more about the benefits of joining and to apply for membership, check analystrelations.org/about/

linkedin.com/company/institute-of-industry-analyst-relations/

[@iiar](https://twitter.com/iiar)

