

# BUILDING STRONG RELATIONSHIPS

*with Industry Analysts for Competitive Differentiation*

**Monthly reports, which used to take four to five hours to generate, are now cranked out in 15 minutes after implementing ARchitect.**

*Peggy O'Neill Vice President, Industry Analyst Relations Informatica LLC*

## GOALS

Improve monthly reporting efficiency and allow for ad hoc reports

Enable AR managers to easily review analyst interaction history

Reduce time for regular email updates to analysts

## SOLUTIONS

Create custom interaction fields in ARchitect to allow for easy reporting by product, region, and firm

Take advantage of ARchitect's integration with Microsoft Outlook to easily enter and sync analyst interactions throughout the day

Create custom analyst groups in ARchitect to maintain specific lists for Informatica's portfolio

## RESULTS

Slashed time for generating monthly metric reports from 5 hours to 15 minutes

Analyst history is easily accessible to all team members and institutional knowledge preserved

Saves time and stress in choosing different products to highlight in updates.

# BUSINESS AND TECHNICAL REQUIREMENTS

- Easy deployment and integration with Microsoft Outlook
- Responsive customer support as analyst relations can be time sensitive in nature
- Up to date analyst contact information and content

## About Informatica LLC

Informatica is the only proven Enterprise Cloud Data Management leader that accelerates data-driven digital transformation. Informatica enables companies to drive innovation, become more agile, and realize new growth opportunities, resulting in intelligent market disruptions. Over the last 25 years, Informatica has helped more than 9,000 customers unleash the power of data.



Over the past 25 years, Informatica has built a \$1.2+ billion enterprise software business based on managing and governing data throughout an enterprise regardless of platform or application of origin. In 1993 Informatica started as an extract-transformation-load tool for data warehousing and today it leads in seven key areas in the data management market. In 2017 and 2018, analyst firm Gartner named Informatica a leader in all five Magic Quadrants where it is evaluated. As of August 2019, Informatica remains a leader in the Magic Quadrants published so far this year.

Informatica boasts the broadest ecosystem support in the software industry. It has 500+partners and works with a network of 350,000+skilled Informatica developers worldwide. Due to its best-of-breed approach in every market it competes in, Informatica has a proven track record of working closely with the industry analyst community. Organic growth and growth through acquisitions means the analyst relations team is always busy cultivating new analysts while maintaining strong relations with longtime watchers.

“Informatica has a corporate culture that is particularly well suited to working closely with industry analysts,” explains Peggy O’Neill, Vice President, Industry Analyst Relations. “We’re intellectually humble, very customer focused, but with a strong product bent. When given thoughtful feedback from the analyst community, we gracefully listen and learn from it. Overall, the company views our strong relations with the analysts as a positive differentiator as they help educate customers, accelerate deals, amplify our messages, and provide us with useful insights about competitors and market trends.”

## Preserving Institutional Memory

Informatica had a positive history of working with analysts, but still had a significant amount of manual processes and siloed information about analysts throughout the company. Critical data existed within Excel spreadsheets, email, and network file shares with very little automation and workflow. Thus, it was often difficult for get detailed information about past analyst interactions.

“As Informatica grew through acquisitions and organically, the number of analysts we were working with and the frequency of analyst interactions was rising steadily. It became apparent that we needed to formalize our approach using a purpose-built tool and reduce the time involved in monthly reporting, as well as have the ability to easily handle ad hoc reporting requests.”

Before adopting ARchitect, Informatica evaluated other solutions such as customizing Salesforce or building an internal application. ARInsights’ focus and expertise on analyst relations was a key reason for selecting the ARchitect platform, along with ARInsights’ reputation for responsive customer service. The application’s integration with Microsoft Outlook, robust reporting capabilities, and easy-to-use interface meant minimal training and changes would be required.

# INSIDE THE SOLUTION

## ARchitect

- ARchitect Database
- ARchitect Reporting
- ARchitect Emailer
- Analyst Premium Content



### **Saving time and reducing stress**

Benefits of using ARchitect were immediate and dramatic. Monthly reports, which used to take four to five hours to generate, are now cranked out in 15 minutes. ARchitect's ability to create custom fields for interactions meant Informatica could now start tracking interactions easily by product, region, and analyst.

Informatica also makes regular use of ARchitect's feature to create custom analyst groups for its sprawling portfolio. Informatica's products lend themselves to easy cross-sell and upsell, so being able to provide updates is made easy with ARchitect. Also, at company events with analyst

programs, there is the need to send multiple update emails, often unplanned and time sensitive. ARchitect's email function, along with an event-specific Analyst Group, make it fast and painless to send out group emails.

### **Helpful in targeting unfamiliar analysts**

ARchitect's analyst database is also very useful in time sensitive situations where unfamiliar analysts are concerned and gives AR teams the information they need to advise executives about a new group of analysts, giving them confidence in devising messaging and briefing content. By targeting unfamiliar analysts with appropriate content in a timely manner, Informatica enjoys positive analyst commentary on acquisitions and other corporate news and eliminates surprises.

Another common scenario occurs when a colleague emails or calls about coverage from an unfamiliar analyst. ARchitect's database permits AR managers to get the basics - including social media links - on the analyst and its firm in minutes. Armed with this information, AR can advise colleagues on whether this analyst requires immediate attention or is better ignored.

Informatica has been using ARchitect since 2015. "In our experience, small teams - maybe especially small teams - can always use more time. "ARchitect's biggest benefit is saving time and reducing stress," O'Neill said.