The Analyst Relations Principles

A Strategic Charter for Vendor-Analyst Engagement

Draft 1.0.1

Established at the AR 2030 Leadership Summit in Verona, June 2026

Purpose of This Charter

This document begins to codify the standards that senior Analyst Relations leaders agree should govern the relationship between technology vendors and analyst firms.

The Analyst Relations Principles ("the principles") are authored by a founding group of experienced AR practitioners who collectively manage analyst engagement for some of the world's largest technology companies.

This group reflects decades of operational experience, billions of dollars in cumulative analyst spend, and a shared conviction that current engagement norms no longer serve either party or the buyers they claim to support.

The principles are offered in good faith. They define this community's commitments to its conduct and what it expects in return from the analyst firms it engages.

The next steps:

1. Edits to this document to reach consensus on the core set of guiding principles among attendees of the recent AR 2030 Leadership Summit. Timeframe: July-August 2026.
2. Open the scope to gather input from a broader set of Analyst Relations professionals. Timeframe: August-September 2026
3. Engage with a representative group of industry analysts to gather their perspectives and flag any roadblocks or deal-breakers. Timeframe: September-October 2026
4. Final review and publication of version 1.0 of the AR Principles. Timeframe: November 2026.

Audience

These principles are written primarily for senior Analyst Relations leaders as a shared operating standard, and secondarily for analyst firm leadership as a basis for constructive engagement on buyer decision quality.

The Governing Principle

Vendors and analyst firms exist to improve the quality of buyers' decisions. Every engagement between them, whether it's an evaluation, advisory, inquiry or publication, should be measured against that shared purpose. When practices diverge from this standard, both parties are obligated to challenge them.

> *This is the single arbitrating test. When disagreements arise on process, methodology, timelines or information requirements, the question is always: does this serve buyer decision quality, or does it serve something else?*

Any party unwilling to commit to this proposition signals that accurate buyer information is not its primary objective in this engagement.

Definitions

In this charter, “vendors” refers to technology providers engaging with analyst firms; “analyst firms” refers to organizations employing industry analysts and publishing research; “buyers” refers to organizations and professionals using analyst insight to inform technology decisions; and “Analyst Relations (AR)” refers to the vendor function that manages engagement with analyst firms.

I. Shared Purpose

Vendors and analyst firms agree that the ultimate outcome of a set of defining principles is to help buyers make well-informed decisions.

This principle establishes the common ground on which all others rest. It is a statement of alignment and a test of intent. When this shared purpose is honored, the relationship functions. When it is compromised, whether by commercial incentives, institutional habit or unchallenged processes, both sides suffer, and buyers receive poorer guidance.

SUPPORTING STANDARDS:

- Evaluations exist to inform buyers. Both vendors and analysts should resist treating them as competitive positioning exercises or as revenue-generating activities disconnected from buyer outcomes.
- Advisory services exist to transfer insight. Value flows in both directions, from analyst to client and from vendor to analyst, to support better-informed markets.
- Customer evidence, analyst judgment and market data are jointly held instruments of buyer decision quality. Neither party owns the outcome alone, and both share accountability for correcting guidance when better evidence emerges during the fact-checking stage of a report.

II. Evidence Over Assertion

Both parties commit to grounding claims, positions and published opinions in verifiable evidence and to being transparent about where evidence is incomplete.

This principle sets a shared standard for intellectual rigor, applying equally to vendor messaging and to analyst methodology. It requires both sides to distinguish among what they know, what they believe, and what they cannot (yet) substantiate.

SUPPORTING STANDARDS:

- Vendors commit to presenting honest, current, and verifiable customer evidence. Coached references, manufactured proof, and messaging-as-evidence erode buyer trust.
- Analyst firms commit to transparency about how customer evidence is weighted, how customer reviews inform scoring and how judgments are formed when evidence is incomplete, including making core methodological assumptions available to participating vendors.
- When evidence is insufficient to form a judgment, both parties acknowledge that gap rather than filling it with assumptions.

III. Proportionate Process

Analyst methods, timelines, and information requests should be justified by buyer value and proportionate to the evaluation purpose they serve.

This principle addresses the mechanics of engagement, not as operational complaints but as a direct consequence of the governing proposition. If a process serves buyer decision quality, it is justified; if not, it should be challenged.

SUPPORTING STANDARDS:

- Evaluation timelines set by analyst firms enable accurate, thoughtful responses from vendors. Artificial urgency produces lower-quality inputs that undermine buyer guidance.
- Information requests for specific reports are tied to specific evaluation criteria. If an analyst cannot explain how a data point contributes to buyer decision quality, the request is discussed and either justified or withdrawn.
- Consistency is maintained whenever participants are comparable in scope and context. When an analyst firm offers extensions, exceptions, or process changes to one participant, it offers them to others on the same terms.
- Vendors commit to meeting agreed timelines and providing the information genuinely required to form accurate evaluations. AR teams educate internal stakeholders that withholding relevant evidence as a negotiating tactic violates the shared purpose and ultimately harms the quality of buyer decisions.

IV. Professional Respect and Clear Channels

Vendor-analyst engagement operates through defined, professional channels with mutual respect for roles, boundaries and institutional knowledge.

This principle holds that the people managing these relationships on both sides deserve professional recognition and that circumventing them degrades the quality of engagement for everyone.

SUPPORTING STANDARDS:

- Analysts primarily work through AR as the designated professional channel, recognizing that AR exists to ensure productive, well-prepared interactions, while maintaining appropriate direct relationships with product, marketing and executive stakeholders as coordinated with AR.
- Analyst sales teams work with vendor AR, treating them as an ally and guide – not a gatekeeper.
- AR teams facilitate genuine engagement, ensuring access is maintained for effectiveness and insight rather than internal political reasons.
- Both parties recognize that AR serves as the analyst firm's advocate and champion within the vendor organization. AR is the connective function where content, briefings, events, and client interactions converge. AR makes the case for engagement internally, fights for budget, and activates research across the business. Recognizing and supporting this role benefits both parties. It is how the relationship delivers value at scale.
- Both parties maintain accurate records of interactions. Professional documentation supports accountability and continuity, and policies that hinder accurate record-keeping are challenged on principle.
- Escalation paths are clear, documented and functional in both directions. Executive-to-executive channels complement professional engagement; they do not bypass or compromise it, and outcomes of such escalations are recorded and communicated through AR to preserve continuity and institutional knowledge.

V. Value is Earned and Evidenced

Productive analyst relationships are built on demonstrated relevance, not assumed entitlement. Both vendors and analyst firms commit to grounding their engagement in the actual impact analysts have on buyer decisions – and to reviewing that honestly over time.

SUPPORTING STANDARDS:

- Analyst firms are prepared to demonstrate their buyer reach, deal influence and market relevance when asked, reflecting a shift from assumed value to evidenced impact.
- Vendors apply rigorous criteria to analyst relationships: coverage, reach, buyer influence, market relevance and measurable outcomes. These criteria are consistent with how other strategic investments are evaluated.
- Vendors commit to sharing a consolidated view of their analyst-related investments with each firm, at an appropriate level of detail, enabling analysts to align resources, prioritize coverage and deliver value proportionally. Demonstrated value requires transparency from both sides.
- AR teams recommend against participating in evaluations or programs when prerequisites are not met, including customer references, product readiness and communications plans, recognizing that incomplete participation risks misleading buyers and degrading decision quality.

– The decision to participate is a strategic judgment. “We have always done this report” is not a strategic rationale.

Collective Commitment

These principles carry force only when the community upholds them collectively. Individual pushback is easily absorbed; coordinated professional standards are not.

The founding group commits to:

– **Consistency.** Raise process and methodology concerns collectively when they affect all participants, rather than negotiating in isolation.

– **Knowledge sharing.** Exchange insights on what works, such as escalation strategies, qualification frameworks and engagement models, to strengthen the profession’s collective position.

– **Reference.** Cite these principles when specific issues arise, rather than treating each interaction as a standalone negotiation.

– **Growth.** Invite other senior AR leaders to endorse and adopt these principles, thereby building the collective weight that gives them force.

This is professional standards-setting. It is the same mechanism used in every mature industry: experienced professionals defining how they intend to operate. It is not commercial coordination, competitive collusion or refusal to engage.

All collaboration under these principles respects applicable competition and antitrust laws and does not constrain vendors’ independent commercial decisions.

Next Steps

– **1. Internal adoption.** Each founding member adopts these principles as internal operating standards governing their team’s conduct, stakeholder conversations and analyst engagement.

– **2. Community growth.** The founding group identifies and invites additional senior AR leaders who uphold these standards. Each endorsement strengthens the principles.

– **3. Analyst firm engagement.** At the appropriate time and with sufficient collective weight, the principles are presented directly to analyst firm leadership, beginning with planned executive meetings at upcoming symposia.

– **4. Ongoing refinement.** This is a living document. The founding group reconvenes periodically to assess whether the principles remain current, whether new standards are needed and whether collective action is achieving results.

Founding Signatories

[Names to be confirmed]

July 2026