



## Analyst Relations

# The briefing checklist that wins influence

From Analyst Firm of the Year—  
5 Years and Counting

**Bring more to the table. Discover the data your marketing and strategy teams didn't know they needed.**





# You don't need more briefings. You need better ones.

Analyst Relations teams are being asked to do more with less —less budget, less time, and often less clarity from internal teams. The solution? A disciplined approach that makes each touchpoint deliver value before, during, and long after the meeting. Use this checklist to brief with impact and walk away with momentum.





# Build a narrative that travels

## ☐ **Lead with market truth, not marketing copy**

Analysts (and your stakeholders) respond to relevance. Anchor your story in verifiable market trends. What's happening in your category that your solution addresses directly?

## ☐ **Anticipate the internal follow-through**

The briefing is just one stop. How will the insight from this session travel to your Marketing, Product, or GTM teams? Think beyond the deck; what will they need?

## ☐ **Bring the data your strategy team didn't know they needed**

Briefings are an opportunity to surprise (in a good way). What's the one data point or trend that could change how your org sees the market?

### **IDC insight:**

According to IDC's 2025 Analyst Experience Survey, **analysts rank "market-backed positioning" and "clear buyer relevance" as top indicators of a high-quality vendor briefing**, well above visual polish or innovation hype.

➔ Use this insight to reframe your briefing structure: Lead with evidence. Follow with differentiation. Close with strategic intent.







## During the briefing

# Don't present. Co-create.

### ☐ Invite analyst POV Early

Lead with a question or challenge you're seeing in the market. Analysts remember conversations, not monologues.

### ☐ Bridge the gap between analyst insight and internal action

What the analyst shares can often shape product direction, competitive moves, or messaging, but only if AR connects the dots. Capture takeaways with the audience in mind.

### ☐ Be the strategic catalyst, not the coordinator

AR's influence rises when it brings the right people, in the right roles, into the room. Use the briefing to align internal SMEs with analyst expectations.

### IDC insight:

IDC research shows that vendors who consistently brief **at least 2x per planning cycle and follow up with data-driven updates are 3.4x more likely** to be included in landscape or leadership evaluations.

➔ Analysts don't just remember your story; they remember how you keep it relevant.







## After the briefing

# Turn insight into internal currency

### ☐ **Package takeaways for each function you serve**

Don't wait for the report. Summarize the key signals for Marketing, Strategy, and Product. Tailor by function and show them what matters and why.

### ☐ **Close the loop with analysts—and internally**

Did anything change because of this interaction? Let the analyst know. It builds credibility and deepens engagement.

### ☐ **Document your wins**

Show leadership how your analyst engagements are advancing business outcomes like: shaping positioning, validating strategy, or accelerating GTM. AR isn't just influencing analysts. It's influencing the business.

### **IDC insight:**

In 2025, **61% of AR professionals say they now influence messaging, GTM strategy, or product planning directly, up from just 38% in 2022.** (IDC AR Leadership Trends Report).

➔ That means the best AR teams aren't just shaping external perception; they're steering internal alignment.





# Why this matters

- **11B+ data points distilled into actionable insights**
- **Buyer-side and vendor-side intelligence in one view**
- **Recognition as Analyst Firm of the Year (IIAR) for five straight years;**  
because analysts trust us, and so can you.

## Ready to upgrade your impact?

Bring more to the table. Discover the data your marketing and strategy teams didn't know they needed.

Start a strategic conversation with IDC to discover the insight your teams are missing.

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