

Gartner Critical Capabilities: Event Driven (Off-Cycle) Updates



Frequently asked questions

Q. How Do You Produce These Updates?

A. Critical Capabilities operate on an annual cycle. As with our current Critical Capabilities methodologies and processes, Gartner's annual refresh cycle defines market scope, inclusion criteria, use cases, scoring norms and weightings. Continuous monitoring of changes to the products or services included within the annual Critical Capabilities allows for updates within those parameters when analysts identify changes that materially affect the product or service's capabilities. The annual Critical Capabilities process is unchanged. Updated capability scores and analysis feature in interactive and static Critical Capabilities.

Q. Why Is Gartner Delivering Event-Driven (Off-Cycle) Updates to Its Critical Capabilities?

A. Gartner's goal is to give clients the latest information they need for their technology portfolio decisions when reading Critical Capabilities research. We achieve this through providing updates to the information about products and services included in the Critical Capabilities report throughout the year to maximize the relevancy of Gartner's analysis. The annual product or service assessment cycle is unchanged, and the inclusion criteria, use cases and scoring methodology will not change during the year.

Event-driven, off-cycle updates to Critical Capabilities research maximize the relevance and timeliness of Gartner analysis when making evaluation or purchasing decisions. They aim to meet Gartner clients' evolving needs by:

- Reflecting the latest changes to a product or service's capabilities
- Highlighting only the most relevant major changes that affect technology portfolio decisions
- Providing updates consistently assessed against a common framework

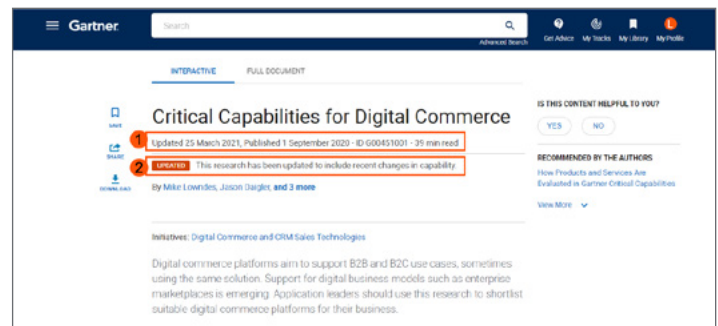
Q. What Does the User Experience Look Like?

A. The Gartner interactive reader view of the Critical Capabilities on gartner.com highlights when off-cycle updates are made, and for which vendors as shown in the following series of figures.

Figure 1 key features:

1. Date of the latest update, and publication date of the original Critical Capabilities report before any updates
2. "UPDATED" box and text that indicates that the research has been updated to include recent changes in capability.

Figure 1. Critical Capabilities Default View



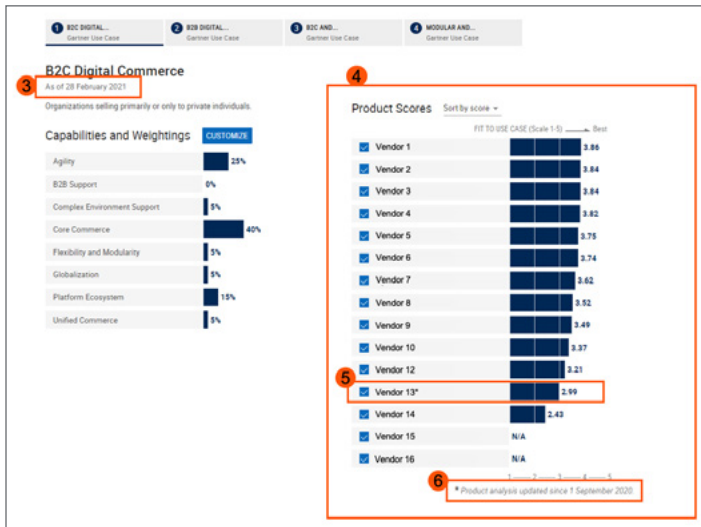
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Frequently asked questions (continued)

Figure 2 key features:

3. Publication date of the latest update
4. Revised product score graphic to show latest update
5. Vendor/product names have an asterisk (*) to indicate a change from the original report
6. Legend explaining the asterisk (*)

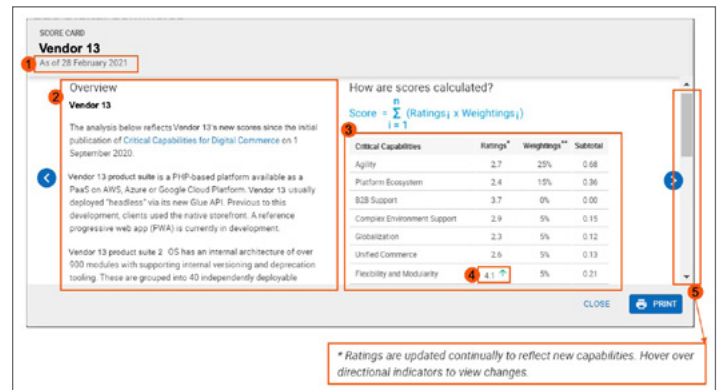
Figure 2. Scorecard View



Updates are also visible in the scorecard view shown in Figure 3:

1. Date when the updates to the product scores and vendor profile was completed and closed to all further input
2. Updated vendor analysis text that reflects new vendor scores since the original research was published, and text that provides the original publish date
3. Revised Product Score graphic showing the latest changes against the original publication versions
4. Revised scoring graphic with up (green) and down (red) arrows to indicate changes since publication of the original Critical Capabilities report
5. Scroll down to view help text to explain how to use the “hover over” feature

Figure 3. Critical Capabilities Links to Off-Cycle Updates



The full document user experience presents many of the same notification elements, including:

- “UPDATED” box and new and original publication dates
- Vendor/product names have an asterisk (*) to indicate a change from the original report
- Green up and red down arrows to indicate a scoring change

In addition to these visual elements, the full document contains a “History” section that captures the original reports’ vendor analysis and scoring.

Q. What Kinds of Events Trigger an Update to a Critical Capabilities Report?

- A. Gartner analysts will assess whether the release of a new functionality, for example, has a significant impact on the capabilities of the product or service. If the impact is significant enough, they will revise the scoring and update the analysis of the capabilities for the vendor concerned by the event.

Q. How Does Gartner Define “Significant”?

- A. Gartner analysts will be reviewing new releases of products and services included in a Critical Capabilities document to identify changes that materially affect the alternatives that Gartner clients are likely to purchase to meet the use case needs within their enterprise. As such, Gartner is evaluating whether the new product or service release significantly impacts the capability score of the product or service.

Q. What Do I Do if I Have Concerns About the Critical Capabilities Update Process?

- A. If you have concerns about the processes or methodology being followed during the creation of a Critical Capabilities update, do not hesitate to reach out to the author. If at any time you believe that your concerns about process or methodology are not being given appropriate consideration, know that Gartner has a formal [escalation process](#), which starts with the lead analyst’s Team Manager.

Frequently asked questions (continued)

Q. What Happens to the Annual Critical Capabilities Reports?

A. The process for annual Critical Capabilities reports remains the same, but the annual report can now be appended with embedded text updates that provide details of any significant changes in the capabilities of a provider's product and service along with changes to the scoring of that product or service that Gartner has identified in the annual report. The interactive view of the Critical Capabilities will show the updated (and latest) product scores and vendor rankings graphically, and as such, vendor ranking in the interactive Critical Capabilities might change as a result."

Q. Are Products and Services Analyzed in the Same Way for Off-Cycle Updates?

A. Yes. These updates will be consistently assessed against a common framework. Gartner analysts will use the same inclusion criteria, use-case scenarios, capabilities and weightings that they used for the annual Critical Capabilities document.

Q. Who Initiates These Updates?

A. Gartner analysts review new releases of products and services included in a Critical Capabilities document to identify changes that materially affect the alternatives Gartner clients are likely to purchase to meet the use case needs within their enterprise. Gartner analysts leverage known information shared with Gartner in various ways, for example, [vendor briefings](#), end-user inquiries or Gartner Peer Insight reviews. Gartner analysts use briefings as a key input and research tool. They schedule briefings at their discretion based purely on an interest in the vendor, its technologies and its marketplace, not because of any fee or contractual relationship. As such, they might reach out to a provider affected by a significant event to gather additional information that would support the provider's capabilities evaluation.

Q. Will Gartner Be Surveying Vendors Throughout the Year?

A. No. Gartner will only conduct vendor surveys as part of the annual Critical Capabilities refresh cycle. Analysts will use multiple other sources, including Gartner Peer Insights reviews, client inquiries, interactions at industry events and credible public sources, as input for off-cycle updates within the year.

Q. How Many Updates Will Gartner Issue?

A. Gartner is not setting a limit for the number of updates it will provide throughout the year. The number of updates will depend on how many significant events there are in the market during the year that require Gartner analysts to update a vendor's capabilities scores accordingly.

Q. Will Some Providers Have Multiple Updates While Others Have None?

A. Gartner analysts will only issue updates for significant changes in a product or service's capability scores as providers update their products and services. This means that the number of updates will vary according to vendor schedules and how significant the event might be. As such, some vendors will get updates, while others won't. However, Gartner will only display one update per product or service (i.e., the most recent update), reflecting the latest capability score and use case fit for that vendor."

Q. If an Update Is Created, Does Gartner Need to Review All Other Providers/Products Because of Their Relative Assessment?

A. Gartner off-cycle Critical Capabilities updates are anchored to the same criteria (defined in the annual Critical Capabilities report) throughout the year. Clients really want to make apple-to-apple comparisons throughout the year. Gartner analysts are also keeping the 1 to 5 scoring rubric that they are using for assessing capabilities throughout the year. There is therefore no requirement for Gartner to update all vendors featured in a Critical Capabilities because any score change to a given provider is done consistently within this defined scale.

Q. Will the Same Analysts Write the Critical Capabilities Report and Create the Updates?

A. Yes, when possible. To ensure consistency in evaluation and scoring, the same team of analysts who wrote the annual report will also work on the update."

Q. Can a Product or Service's Capability Score or Fit to Use Case Only Increase?

A. No. Gartner analysts will identify whether a product or service update is a significant improvement or not in terms of capability score and fit to the use cases identified in the Critical Capabilities report.

Q. How Will You Handle New Products or Providers Entering the Market?

A. Gartner will only provide updates, where appropriate, on products or services that are already included in the published Critical Capabilities report. Analysts might author other research notes to ensure that clients are still getting the latest information about new releases in the market.

Frequently asked questions (continued)

Q. How Will I Know That Gartner Has Issued an Update to a Critical Capabilities Report?

A. Providers included within a specific Critical Capability research note will receive a courtesy copy of the main Critical Capabilities report they feature in to view the update analysis and scoring. Use the Track feature on gartner.com to set up an automated alert. This feature enables you to keep on top of research that's important to you. Click on the Create New Tracks button and then use either the Vendors track and choose the appropriate vendor name(s) from the drop-down list or the Keywords track and set up appropriate keywords, such as "BI and analytics."

Q. How Are You Notifying Clients That There's Updated Information in the Critical Capabilities Report?

A. Clients are encouraged to use the "Track Vendor" feature on gartner.com to set up an automated alert; see the "Making the Site Work for You" in the gartner.com Help section for more information on how to set up your tracks. This feature enables Gartner clients to create and manage tracks to keep on top of research that's important to them. Visual indicators, such as icons and bold red "UPDATED" text in the interactive, HTML and downloadable (PDF) versions of the Critical Capabilities report, will also inform Gartner clients that they feature updated information.

Q. Will Providers Be Able to Review the Update Before Publication?

A. Gartner will allow vendors to review the factual content of off-cycle updates to Critical Capabilities before publication. A standard fact review of the write-up and revised scoring will be carried out with the provider covered in the update. This review will have a shorter (two-day) review cycle because of the limited amount of content that will need to be reviewed. All vendors included in the graphical analysis of a particular annual Critical Capability note will also receive a courtesy copy of the updated Critical Capabilities once it is published.

Q. Does the Update Affect My Product/Service Positioning in Prior Years?

A. No, it does not. Previously published positions are fully preserved. Critical Capabilities that are older than 18 months will still be available for historical purposes and for viewing only. Please see [Gartner's Copyright and Quote Policy](#) for guidance on archived research.

Q. Are You Making Any Changes to the Companion Magic Quadrant Methodology?

A. Off-cycle updates apply only to Critical Capabilities documents at this time.

Q. Can I Buy Updated Critical Capabilities Reprints From Gartner?

A. Reprint clients will see a "time stamp" on the (annual) Critical Capabilities note to support their marketing campaign planning. You may continue to purchase a reprint for the main active Critical Capabilities report. You also may continue to quote or reference from the main active report, subject to inclusion of the "as of" date to ensure proper context. All remaining parameters from the [Gartner Copyright and Quote Policy](#) apply. For questions on how to properly reference from the updated report, contact Gartner Quote Requests at quote.requests@gartner.com.