Frequently Asked Questions

The Gartner Critical Capabilities is a companion to the Magic Quadrant. It offers a comparative analysis that scores competing products or services against a set of critical differentiators that have been identified by Gartner.

Critical Capabilities research helps Gartner clients to answer the key question, “Which product or service is the best solution for my specific needs?”

This FAQ document is designed to provide an overview of the evolution to Gartner Critical Capabilities to support event driven (off-cycle) updates, and to answer some commonly asked questions.

For answers to questions relating to Gartner Critical Capabilities, please contact methodologies@gartner.com
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Critical Capabilities: Event Driven (Off-cycle) Updates

Event Driven (off-cycle) Updates within Critical Capabilities 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

What Are the Key Changes I Need to Care About or Explain to My Stakeholders?

Gartner’s goal is to give its clients the latest information they need for their technology portfolio decisions when reading Critical Capabilities research. We will 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.

Why Are You Making This Change?

Gartner’s aim is to deliver up-to-date views of products and services to its clients — including the latest information about changes to a product or service’s capabilities — based on today’s rapidly evolving technology markets. These methodology enhancements are part of the continuous evolution of Gartner research content to further support Gartner client needs.

How Will You Produce These Updates?

Critical Capabilities documents operate on an annual cycle. As with our current Critical Capabilities methodologies and processes, Gartner’s annual refresh cycle will continue to define 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 will allow for updates within those parameters when analysts identify changes that materially affect the product or service’s capabilities or fit for the use cases. These changes will be included as “Additional Perspective” updates documents that are linked to the annual Critical Capabilities report.

What Will the User Experience Look Like?

Gartner has updated the interactive reader view on gartner.com to highlight when off-cycle updates are made, and for which vendors.

Key features include:

1. “UPDATED” box and date of the latest update appears in the header
2. Publication date of the original Critical Capabilities report before any updates
3. Publication date of the latest update
4. Vendor/product name has an asterisk (*) next to it to indicate a change from the original report
5. Legend explaining the asterisk (*)
6. Revised product score graphic to show latest update
Figure 1. Critical Capabilities Default View
Gartner has also added enhancements to the scorecard view shown in Figure 2:

1. Publication date for updates to the product scores and vendor profile
2. Link for clients to access the latest publication of the event-driven update and original text from original publication of the Critical Capabilities report
3. Revised scoring graphic with up (green) and down (red) arrows to indicate changes since publication of the original Critical Capabilities report
4. Helper text to explain how to use the “hover over” feature
5. Revised Product Score graphic showing the latest changes against the original publication versions

Figure 2. Score Card View
Links to updates to Critical Capabilities reports will also be highlighted in the online and downloadable (PDF) versions in the same way as other documents on gartner.com:

Figure 3. Critical Capabilities Links to Off-cycle Updates

Figure 4. Link From Update Back to Critical Capabilities
What Kinds of Events Will Trigger an Update to a Critical Capabilities Report?

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 within the context of the various use cases the analysts have identified. If the impact is significant enough, they will revise the scoring and issue an "Additional Perspective" update.

How Does Gartner Define “Significant”?

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 if the new product or service release significantly impacts the capability score of the product or service and its fit for the use cases Gartner has identified in the Critical Capabilities report. A significant impact could cause a vendor’s score in one or more use cases to change by 0.5 or more in either direction.

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

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.

What Happens to the Annual Critical Capabilities Reports?

The process for annual Critical Capabilities reports remains the same, but the annual report can now be appended with “Additional Perspective” 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 against the client-usage scenarios that Gartner has identified in the annual report. This means that while Gartner is working towards evolving its publishing platform capabilities - the content in the main Critical Capabilities report remains unchanged and valid as of its date of publication. The “Additional Perspective” update documents will be provided as separate reports linked to the main Critical Capabilities, and referenced to the top of its pdf version. The interactive view of the Critical Capabilities will show the updated (and latest) product scores and vendors ranking graphically, and as such vendor ranking in the interactive Critical Capabilities might change as a result.

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

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.

Who will initiate these Updates?

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. Gartner analysts will reach leverage known information shared with Gartner in various ways such as - for example - vendor briefings, end user inquiries, peer insight reviews. Gartner's 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 the provider impacted by a significant change to gather additional information that would support the provider’s capabilities evaluation within a use case.

**Will Gartner Be Surveying Vendors and Reference Clients Throughout the Year?**

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

**How Are You Recruiting Customer References for the Off-Cycle Updates?**

Gartner will only conduct customer reference surveys as part of the annual cycle. Analyst will use multiple other sources (including Peer Insights reviews, client inquiries, interactions at industry events and credible public sources) as input for ongoing updates within the year.

**How Many Updates Will Gartner Issue Each Month?**

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 the scores accordingly.

**Will Some Providers Have Lots of Updates While Others Have None?**

Gartner analysts will only issue updates for significant changes in a product or service's capability scores and fit against the various use cases the analysts have identified as providers update their products and services. This means the number of updates will vary according to vendor schedules. 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.

**If An Update is Created, Does It Not Require Gartner to Review All Other Provider/Product Because of Their Relative Assessment?**

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 like apple comparison 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.

**Will Critical Capabilities Updates Impact the Placement of a Company in an MQ?**

No, updates will apply only to Critical Capabilities at this time.

**Will the Same Analysts Write The Critical Capabilities Report and Create The Updates?**

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

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. As such, a significant new release could get a higher or lower score depending on how well its capabilities perform against the key client usage scenarios.

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

Gartner will only provide updates, where appropriate, on products or services that are already included in the published annual Critical Capabilities report. Instead, analysts will use other research notes, such as Impact Appraisals, to ensure clients are still getting the latest information about new releases in the market.

How Will I know That Gartner Has Issued an Update to a Critical Capabilities Report?

Providers included within a specific Critical Capability research note will receive a courtesy copy of an update appended as an "Additional Perspective" to the main report they feature in.

Use the Track feature on gartner.com (see Figure 5) to set up an automated alert. This feature allows 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.”
How Are You Notifying Clients That There’s Updated Information in the Critical Capabilities Report?

Clients are encouraged to use the “Track Vendor” feature (see Figure 5) on gartner.com to set up an automated alert. This feature allows Gartner clients to create and manage tracks to keep on top of research that’s important to them. Links in the interactive, HTML and downloadable (PDF) versions of the Critical Capabilities report will also direct Gartner clients to the updated information.

Will Providers Be Able to Review the Update Before Publication?

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 by 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 each update once published.
How Will This Impact Previous Critical Capabilities Documents in Which My Company Is Represented?

These changes do not affect previously published Critical Capabilities reports. 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.

Does the Update Affect My Product/Service Positioning in Previous Years?

No, it does not. Previously published positions are fully preserved.

Are You Making any Changes to the Companion Magic Quadrant Methodology?

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

Can I Buy “Additional Perspective” Updates Reprints From Gartner?

Event driven (off-cycle) updates to Critical Capabilities will not be available as part of the reprint service. Reprint clients will see a “time stamp” on the (annual) Critical Capabilities note to support your 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, and may reference from the updated Use Cases listed in the “Additional Perspectives” update 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 Additional Perspectives report, contact Gartner Quotes Requests at quote.requests@gartner.com