

How To Use Forrester Consulting Custom TEI Studies

This reference document provides information on the distribution and use of custom market research studies/data created by Forrester Consulting, specifically, Total Economic Impact (TEI™) studies. This includes information on leveraging the document as part of your marketing efforts and working with Forrester's Citations team.

Best Practice Uses Of Custom Market Research

Many Forrester clients have leveraged custom research studies, such as TEI papers, to market and sell their products and services more effectively by credibly proving the business value of their solution. Successful uses that you can incorporate include:

- › **Posting the final TEI on your website.** For instance, use a banner ad or direct email campaign featuring the study to drive traffic to your website; capture prospect details and leads by requiring registration to download the full paper.
- › **Creating atomized content assets (e.g., social media content, an executive summary, videos, infographics) fit to multiple channels.** Maximize reach and visibility through assets created in-house with Forrester Citations approval, or using the array of Forrester study extensions.
- › **Using the study's content in promotional events (speeches, podcasts, or webinars).** Use data from the custom study or have a Forrester consultant participate in a client-sponsored event to help drive interest; the TEIs are great leave-behinds as well.
- › **Crafting press releases to attract media coverage.** Key findings from studies often capture media attention. Highlight research results in a press release to help generate interest.

If you have questions about how to best use your research, talk to your TEI consultant or sales rep to get more information.

Citation Guidelines For Publishing And Promoting Custom Research

If your study deliverables include a TEI paper, that final paper is approved for external use and may be distributed or posted on your website without explicit approval.

All other material intended for publication that cites quotes, data, or results from a custom study must be approved by Forrester's Citations team (citations@forrester.com). Please submit each request for promotion individually, and provide the final study materials you are citing with your request. Allow 24 to 48 hours to receive edits or approval for each submission.

Before you submit copy or material for approval, please consider Forrester's [Citation Policy](#) and the following guidelines. Promotion and publication of Forrester Consulting studies and custom data:

- › **Must avoid cobranding.** No citation of the study or reference to Forrester's name or research may be positioned to imply that Forrester is co-promoting the product with any other company. For example, Forrester's name may not be used in the header or subheader of a release; the lede of a press release may not give the impression that Forrester is issuing the release; and Forrester's boilerplate may not be used. Forrester's name may also not be used in an email subject line or in the company's boilerplate.

- › **May not appear to endorse your company or product.** The study cannot be positioned to imply that Forrester is endorsing any particular product or brand, nor can the research be referenced in any material that makes negative or comparative references to specific companies, regardless of the sources involved.
- › **Must have consistent attribution.** At all times, the study should be referred to as “a commissioned study conducted by Forrester Consulting on behalf of [your company]” and include the date of its publication.
- › **May only cite risk-adjusted/projected ROI figures.** Only risk-adjusted/projected ROI figures may be cited to highlight the financial returns, as they represent the full Total Economic Impact methodology.
- › **May not be attributed to a Forrester analyst or consultant.** Forrester Consulting is considered the author of this paper. The analysts and consultants who worked on the study may not be identified as the authors of the study in any promotional emails or other communications.
- › **May only use quotes from the final study text.** All quotations used in marketing or other published materials must be taken verbatim from the final study document and attributed only to Forrester Consulting and the study.
- › **Require specific approvals for promotion across all media types.** All communications via social media applications, including, but not limited to, Facebook, Twitter, and blogs, are subject to the guidelines described in the Citation Policy; marketing materials issued through social channels are subject to the same rules as any other marketing piece and need to be approved by Forrester individually.
- › **Must present any video or recorded elements in their entirety.** Statements made during webinars, podcasts, videos, or other recorded presentations may not be transcribed, translated, or otherwise cited. Such recordings may only be replayed in their entirety, with the audio and visual elements presented in sync.

Press Interactions Regarding Your Custom Study

A TEI consultant/project director is permitted to discuss the findings of the study with independent media outlets as an industry expert familiar with the research but cannot be identified as the author of the study, which should be attributed to Forrester Consulting. Interviews with press must be independent; the client cannot facilitate press interaction. Clients can refer press to Forrester PR (press@forrester.com) but cannot list Forrester as a PR contact on their materials.

Follow-Up And Contact Information

- › **Using your study or data:** Contact the consultant who worked on your study.
- › **Citing your study or Forrester Research:** Contact citations@forrester.com.
- › **Engaging with Forrester to evangelize the study results:** Contact your account manager, BDD, or consultant.

ABOUT FORRESTER CONSULTING

Forrester Consulting provides independent and objective research-based consulting to help leaders succeed in their organizations. Ranging in scope from a short strategy session to custom projects, Forrester's Consulting services connect you directly with research analysts who apply expert insight to your specific business challenges. For more information, visit forrester.com/consulting.

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