

May 13, 2011

# The Forrester Wave™: Salesforce.com Implementation, Q2 2011

by Liz Herbert  
for Sourcing & Vendor Management Professionals



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In A Rapidly Changing Market, Forrester Sees Increasing Vendor Differentiation

by **Liz Herbert**

with John C. McCarthy and Mark Grannan

### EXECUTIVE SUMMARY

To help clients with complex, enterprisewide salesforce.com initiatives, Forrester recently evaluated the offerings of 11 leading service providers. In this 46-criteria evaluation of salesforce.com (SFDC) implementation services providers, we found that Accenture and Wipro lead the pack because of their practice maturity, depth and breadth of resources, and suitability for larger, more complex deployments. Specialists like Appirio, Bluewolf, Model Metrics, Astadia, and CoreMatrix also fared well in the evaluation due to their deep technology expertise and their heavy focus on SFDC projects. Global consultancy Deloitte scored high, boosted by its capabilities in larger, more transformational deals and its expertise in change management. India-based providers like Cognizant, Infosys, and HCL lead the market with IP-based solutions such as accelerators, prebuilt integrations, and prebuilt test scripts for SFDC.

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### NOTES & RESOURCES

Forrester conducted services evaluations in the second half of 2010, interviewing 11 vendors: Accenture, Appirio, Astadia, Bluewolf, Cognizant, CoreMatrix, Deloitte, HCL, Infosys, Model Metrics, and Wipro. Forrester also spoke with a minimum of three client references for each vendor. Finally, we spoke with a number of SaaS implementation providers not included in this report: Aggressor, Capgemini, Cloud Sherpas, Collaborative Solutions, CSC, DayNine, Dell, Dito, EDL Consulting, HP, IBM, PwC, Sada Systems, Serene, Sierra Atlantic, and UST Global.

#### **Related Research Documents**

["Cloud Orchestration Models"](#)

February 11, 2011

["How SaaS Will Change Technology Sourcing Strategy"](#)

January 26, 2011

## THE COMPLEXITY OF SFDC IMPLEMENTATIONS DRIVES NEED FOR THIRD-PARTY SERVICES

Salesforce.com is no longer the “plain vanilla” solution of the late ’90s and early part of the 2000s; today’s salesforce.com is a robust and mature technology platform that supports customization and integration at an enterprise level. Organizations like Dell, Japan Post, NBC Universal, and Symantec all rely on salesforce.com to support tens of thousands of their users — often for complex business processes. The rising popularity of salesforce.com as an enterprise-ready tool is reflected in the company’s strong growth: the company passed \$1 billion in revenue in 2010, and grew at 28% from 2010 to 2011.

Yet any technology professional deploying salesforce.com across a large organization is likely to face several complex challenges:

- **Detailed customization requires access to specialized talent.** Firms are customizing salesforce.com to meet their business process needs, utilizing the Apex programming language as well as Force.com add-on modules (for customer relationship management [CRM] add-ons as well as entirely new areas like time and expense or vacation tracking, for example). This means that they need programmers who know these tools. More recently, firms have had the ability to further extend the Force.com platform through Ruby on Rails or Java, but this too requires access to specialized talent.
- **Deployments are often connected to business process redesign initiatives.** Today’s salesforce.com deployments often involve business process redesign, with many firms re-architecting their customer strategy or sales processes in conjunction with a salesforce.com rollout. Other firms use a salesforce.com rollout as an opportunity to create global harmonization of CRM processes, where previously they had a hodgepodge of procedures by region. As a salesforce.com implementation takes on the feel of a larger redesign project, consulting expertise is frequently required.
- **Integration to other SaaS or on-premises solutions creates unexpected complexity.** Salesforce.com no longer runs in the siloed, standalone instances of the early 2000s. Today customers rely on prebuilt integrations to accelerate deployment of common add-on solutions (such as salesforce.com to SAP for customer master or order transaction). Data and process integration represent a bulk of the overall deployment needs in many salesforce.com implementations, creating an integration challenge that many companies are unprepared for.

## SFDC Consulting Options Proliferate From Major SIs And Smaller Specialists

As firms scale up their implementations from local pilots to full-scale enterprise rollouts, interest in third-party consulting services has increased.<sup>1</sup> Reflecting this increased use, a range of different vendors has built out their salesforce.com implementation capabilities:

- **Specialists.** A number of SFDC specialist firms have appeared on the market — ranging from early entrants like Astadia and Bluewolf (early 2000s) to later entrants like Appirio (founded in 2006).

- **MNCs and consultants.** Systems integrators (SIs) have invested substantially in the market, either by organic growth (Accenture, Deloitte, or IBM) or acquisition (e.g., Fujitsu — Okere).
- **Leading Indian SIs.** Cognizant, HCL, Infosys, Mahindra Satyam, TCS, and Wipro, have all been building out practices for newer SaaS or cloud technologies.

## SALESFORCE.COM IMPLEMENTATION SERVICES EVALUATION OVERVIEW

To assess the state of the salesforce.com implementation services market and help customers assess which supplier can best meet their enterprise needs, Forrester evaluated the strengths and weaknesses of 11 top salesforce.com implementation service providers. We not only looked at their salesforce.com implementation services, we also evaluated their ability to implement a solution with components from the broader AppExchange ecosystem and add-on applications such as BigMachines and Eloqua. We also looked at their experience with add-on solutions such as integration tools like Boomi (Dell), Cast Iron (IBM), Tibco, and webMethods.

We focused our evaluation on the needs of larger, more complex salesforce.com deployments, often global in scope, large in scale, or complex in terms of integrations and customization. This focus was a significant determinant of the results of the analysis.

### This Report Focuses On Large-Scale Deployment Capabilities

After reviewing user consulting engagements and inquiries, as well as vendor interviews and briefings, we developed a comprehensive set of criteria. We evaluated 11 vendors against 46 levels of capability across three categories:

- **Current offering.** We evaluated the breadth of consulting capability ranging from strategic and advisory practice depth to technical implementation skills (including customization and integration) to ongoing support and administration models focused on long-term salesforce.com support. Beyond purely salesforce.com, we also evaluated strength around AppExchange applications such as BigMachines, DreamFactory, and Eloqua, which many firms view as critical to their overall salesforce.com strategy. We also evaluated the global span of resources to support salesforce.com deployments across major geographies, as well as industry expertise specific to salesforce.com.
- **Strategy.** To evaluate strategy, we assessed R&D investments in key areas such as salesforce.com implementation accelerators, prebuilt IP, mobility solutions for salesforce.com, and add-on/extension products. We also evaluated global expansion and plans for hiring or acquisition to grow practices to keep up with market demand, particularly critical in this fast-growing market space.
- **Market presence.** Forrester examined total company revenues to get an indication of overall resources available for R&D and cross-skilling of talent. We also evaluated SFDC-specific revenues to assess the scale of an organization's salesforce.com practice. We also analyzed

experience in larger, more complex accounts and larger salesforce.com implementations (defined as those more than \$500,000 in deal size).

**SFDC Practices Are Still Emerging, But Growing Quickly**

Forrester included 11 vendors in the assessment: Accenture, Appirio, Astadia, Bluewolf, Cognizant, CoreMatrix, Deloitte, HCL, Infosys, Model Metrics, and Wipro. To qualify for inclusion, each of these vendors has:<sup>2</sup>

- **More than \$10 million in annual SFDC revenue and more than 50 consultants.** A key criterion for inclusion in this report is scale, since scale is a prerequisite for any enterprise-level partnership. Many newer, smaller entrants did not meet the requirement of proof of scale, in terms of both revenue and number of practitioners. Because of the relative immaturity of the SFDC services space, formal certifications of practitioners are still in their earlier stages, so we tracked this but did not mandate it for inclusion. In general, Forrester believes that buyers should start asking about these certifications in their salesforce.com projects, since they can be a good indication of expertise and investment.
- **Breadth of capabilities from process expertise to technical programming skill.** Salesforce.com supports advanced configuration, integration, and sometimes custom development. Firms included in this analysis have technical expertise across these key areas relevant to salesforce.com. Similarly, today’s salesforce.com buyers typically want process consulting in key CRM domains; providers selected for inclusion were not solely delivering technical programming skill but capable in business processes such as sales or marketing processes or industry-specific processes (see Figure 1).

**Figure 1** Providers’ Top Three Verticals

Accenture	<ul style="list-style-type: none"> <li>• High-tech</li> <li>• BFSI</li> <li>• Life sciences</li> </ul>	Cognizant	<ul style="list-style-type: none"> <li>• High-tech</li> <li>• Life sciences</li> <li>• Utilities</li> </ul>	Infosys	<ul style="list-style-type: none"> <li>• High-tech</li> <li>• BFSI</li> <li>• Media</li> </ul>
Appirio	<ul style="list-style-type: none"> <li>• High-tech</li> <li>• Life sciences</li> <li>• Media</li> </ul>	CoreMatrix	<ul style="list-style-type: none"> <li>• Energy</li> <li>• High-tech</li> <li>• BFSI</li> </ul>	Model Metrics	<ul style="list-style-type: none"> <li>• Life sciences</li> <li>• Healthcare</li> <li>• CPG/retail</li> </ul>
Astadia	<ul style="list-style-type: none"> <li>• Telecom</li> <li>• Media</li> <li>• High-tech</li> </ul>	Deloitte	<ul style="list-style-type: none"> <li>• High-tech</li> <li>• Public sector</li> <li>• CPG/retail</li> </ul>	Wipro	<ul style="list-style-type: none"> <li>• Manufacturing</li> <li>• BFSI</li> <li>• High-tech</li> </ul>
Bluewolf	<ul style="list-style-type: none"> <li>• Media</li> <li>• BFSI</li> <li>• High-tech</li> </ul>	HCL	<ul style="list-style-type: none"> <li>• High-tech</li> <li>• Manufacturing</li> <li>• BFSI</li> </ul>		

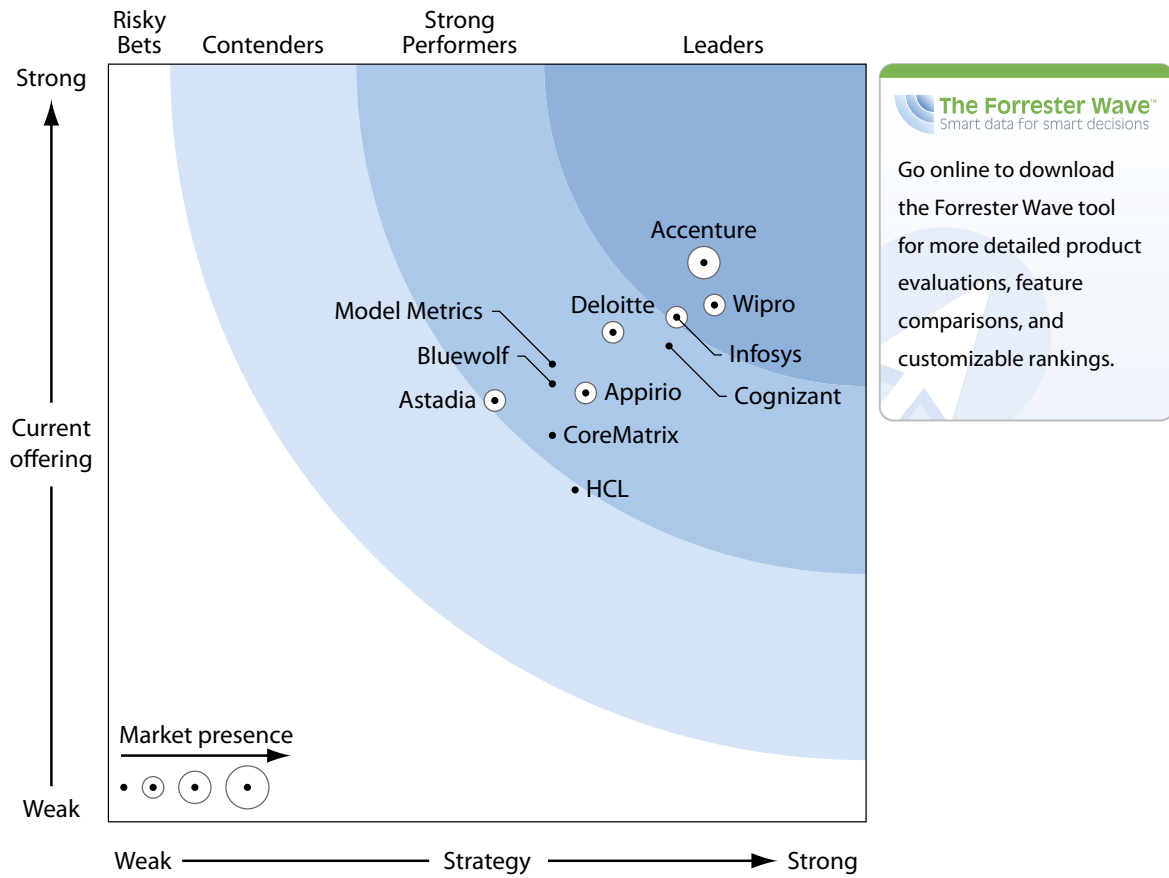
### THREE DISTINCT APPROACHES TO SFDC PROJECTS HAVE EMERGED

Our analysis highlights three distinct approaches to the salesforce.com systems integration landscape (see Figure 2):

- **Global SIs go to market around business process and industry.** Global SIs (Accenture, Deloitte, IBM) have leveraged their resources, breadth of technology, and business process expertise to become key players in the salesforce.com services space. These firms are best suited toward global rollouts and projects requiring integration with solutions like Oracle, SAP, Tibco, webMethods, and other leading packaged applications. Global SIs offer the most geographically distributed resource pool and broadest scope of services, ranging from advisory services to process design to technical implementation, configuration, and integration. Additionally, because they have such strong practices across other technology categories (like integration, packaged applications, and business intelligence), they are well suited toward SFDC projects that are part of larger, more complex initiatives.
- **SaaS specialists target fast implementation, iterative, pure-play SFDC projects.** SaaS specialists — like Appirio, Astadia, Bluewolf, CoreMatrix, and Model Metrics — are focused on the SaaS space, with salesforce.com representing the lion's share of their work today. Increasingly, SaaS, cloud, and mobile solutions are critical to their strategy. These firms are typically more nimble in their approach and take more of an iterative approach than some of the larger SIs. They are ideally suited to projects where SFDC is the core driver; their methodologies are built for the more nimble, iterative “land and expand” style of SaaS deployment. Some of them have productized their IP for use as accelerators in deployments or mobility offerings and for resale on the AppExchange. SaaS specialists can provide excellent focus and value for the money within SaaS projects; on the downside, they have not built out global presence yet and will lack technology expertise in some broader technology categories. Furthermore, their smaller size may make them unsuitable for the requirements of some larger firms.
- **Indians differentiate with IP and platform solutions.** India-based services firms are highly focused on technical development and IP creation. They offer a variety of solutions for salesforce.com that speed deployment or prebuild common integrations or interfaces. Although some India-based firms (like Cognizant, Infosys, TCS, and Wipro ) offer traditional salesforce.com implementation services, many of these firms also invest substantially in tool kits and platforms or other productized services that can be used to accelerate SFDC deployments in key pain point areas (such as integration or testing). Cognizant and Wipro are also moving toward a broker model where they can be the central point of contact for firms dealing with the complexity of multiple SaaS integrations.

This written evaluation of the salesforce.com implementation services market is intended to be a starting point only. We encourage readers to view detailed product evaluations and adapt the criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

**Figure 2** Forrester Wave™: Enterprise Salesforce.com Implementation, Q2 '11



Source: Forrester Research, Inc.

**Figure 2** Forrester Wave™: Enterprise Salesforce.com Implementation, Q2 '11 (Cont.)

	Forrester's Weighting	Accenture	Appirio	Astadia	Bluewolf	Cognizant	CoreMatrix	Deloitte	HCL	Infosys	Model Metrics	Wipro
<b>CURRENT OFFERING</b>	50%	3.69	2.83	2.78	2.89	3.14	2.55	3.23	2.19	3.33	3.02	3.41
Client satisfaction	10%	3.00	4.00	4.00	4.00	4.00	4.00	3.00	3.00	4.00	5.00	2.00
Implementation life cycle	30%	4.13	3.19	3.50	3.38	3.44	3.63	3.69	2.44	4.00	3.69	3.94
Skilled resources	30%	4.00	3.30	3.00	3.00	3.00	1.70	3.30	1.50	2.80	2.50	3.60
Resources by geography	15%	3.10	1.75	2.10	1.60	2.40	1.40	2.80	2.25	2.90	1.40	2.80
Vertical expertise	15%	3.25	1.50	0.75	2.25	3.00	2.25	2.75	2.50	3.00	3.00	3.50
<b>STRATEGY</b>	50%	3.93	3.15	2.55	2.93	3.70	2.93	3.33	3.08	3.75	2.93	4.00
Planned investments	30%	3.75	2.50	2.50	2.75	3.00	2.75	2.75	2.25	3.50	2.75	4.00
Support for advanced pricing models	30%	4.00	3.00	1.00	2.00	4.00	3.00	3.00	4.00	4.00	2.00	4.00
Key partnerships	30%	4.00	4.00	4.00	4.00	4.00	3.00	4.00	3.00	4.00	4.00	4.00
Go-to-market	10%	4.00	3.00	3.00	3.00	4.00	3.00	4.00	3.00	3.00	3.00	4.00
<b>MARKET PRESENCE</b>	0%	3.30	2.20	2.70	1.70	1.61	1.71	2.81	1.71	2.20	1.80	2.40
Large SaaS work	40%	4.00	2.50	3.00	2.00	1.00	2.50	3.00	1.00	2.00	2.00	2.00
Geographic mix of clients	30%	1.34	1.35	3.01	1.35	1.34	1.02	1.67	1.34	1.34	1.35	1.67
Financials	30%	4.34	2.65	1.99	1.66	2.68	1.33	3.68	3.01	3.34	1.99	3.67

All scores are based on a scale of 0 (weak) to 5 (strong).

Source: Forrester Research, Inc.

## VENDOR PROFILES

### Leaders Display Breadth And Depth

- **Accenture.** Accenture is a leader in the SFDC implementation space due to the size of its practice and the provider's substantial depth of experience in larger, complex projects. Accenture has started to build out industry-specific IP in the form of accelerators for salesforce.com and other SaaS areas. It also conducts industry-specific deployments, such as larger deployments of Veeva, a life sciences, SaaS-based add-on for SFDC. In a number of accounts, firms have selected Accenture in phase 2 or phase 3 of an SFDC rollout when they outgrow a smaller specialist.
- **Wipro.** Wipro is a global leader in SFDC implementations and also the leader among the India-based firms. Wipro has worked on more than 90 SFDC implementations to date, including many large and complex rollouts. Wipro's customer profile is a more complex salesforce.com environment, often with integration back to on-premises (such as SAP or Oracle). The firm's greatest strength is its integration capabilities with Oracle, SAP, webMethods, and Tibco.

- **Infosys.** Infosys is a strong choice for firms seeking salesforce.com expertise, particularly when the overall need for help spans SFDC and other applications (like Microsoft, Oracle, and SAP). Infosys' SFDC resources are primarily offshore in India. Infosys' SFDC deployment experience spans banking, consumer packaged goods (CPG), high-tech, discrete manufacturing, and media. Infosys has a significant focus on larger, more complex deployments; approximately half of its total projects are larger projects with \$1-billion companies. Infosys has done SFDC work that spans all major geographies but the bulk of it has been North America.

### Strong Performers Are The Best Technical Solutions

- **Cognizant.** Cognizant was an early entrant among SIs in the SFDC services arena. It has leveraged its broader CRM expertise to become a leading salesforce.com implementation partner. It is a particularly good fit for clients in its target industries, like life sciences, where Cognizant is a key partner for SFDC add-on Veeva. Cognizant has done substantial work in its mainstay financial services vertical, where it has firmwide process knowledge and deep client relationships. One key component of the Cognizant approach is its focus on cloud orchestration, meaning that it is a good option for firms implementing SFDC plus other SaaS applications with significant integration needs or just many SFDC instances. For example, one Cognizant client has more than a dozen SFDC instances through under-the-radar-screen purchasing by business units that it now needs to integrate.
- **Deloitte.** Deloitte is well suited for firms that are changing their business process in conjunction with a salesforce.com rollout. For example, a company in the process of transforming its customer experience strategy — where SFDC is just the supporting platform — might select Deloitte to help with change management and process redesign. Deloitte is appropriate for firms in the planning phase of an overall SaaS or CRM strategy; much of its work is around road map and business case development for SFDC deployments.
- **Appirio.** Appirio is a leading option for firms that are seeking a dedicated SaaS specialist. Appirio is focused almost exclusively on SaaS implementation, including a heavy focus on salesforce.com as well as Google and Web 2.0 applications like Facebook. Appirio has worked on a number of large enterprise SFDC projects including the large-scale Avon implementation that was featured by Marc Benioff at Dreamforce 2009.<sup>3</sup> Similarly, salesforce.com showcased a Starbucks project done by Appirio in which Appirio helped with custom applications built on Force.com for recruiting and Facebook for marketing. Appirio's biggest market is North America but it also has done some SFDC deployments in Japan. Appirio also has a partnership with a firm in Jaipur, India to provide low-cost delivery resources.
- **Model Metrics.** Model Metrics is a leading SaaS specialist, with a strong practice around SFDC. It is an excellent choice for firms that are seeking a smaller, more nimble, flexible partner that is highly dedicated to SFDC. Model Metrics is primarily based on-site in North America but

partners with K2 Partnering Solutions to extend its reach in Europe and Asia. Model Metrics works across a variety of industries with concentration of client experience in financial services (AllState, Morgan Stanley) and health sciences (Abbott Labs, Allergan, Eli Lilly, Medtronic). Model Metrics has created a number of Cloud2Go solutions, which enable SFDC and other cloud solutions on mobile devices.

- **Bluewolf.** Bluewolf is a strong fit for firms that are seeking a combination of deep technology expertise from a salesforce.com specialist and focused consulting capabilities, particularly in sectors like media (ABC, CBS, McGraw-Hill), financial services (Charles Schwab, BNP Paribas, Bank of America, Royal Bank of Scotland), and retail (Ann Taylor, Estee Lauder, Williams Sonoma, J.Crew). Bluewolf has a mix of experience across midsize as well as large clients. Bluewolf is primarily focused in North America but has done projects around the globe. An early pioneer in this space, Bluewolf has done more than 3,000 projects in its lifetime with salesforce.com.
- **Astadia.** Astadia is a good option for firms that are seeking a SaaS specialist, particularly in telco, media, and high-tech. It was one of the earliest SFDC partners (formerly Growth Circle) and it now does approximately \$25 million in annual revenue, focused on the SaaS space, with a significant portion of revenues coming from salesforce.com. Astadia is focused on telco, media, nonprofit, healthcare, and high-tech. Astadia has worked on projects with some of the world's largest salesforce.com deployments and has served approximately 500 clients.
- **CoreMatrix.** CoreMatrix is another good option for firms that are seeking a salesforce.com specialist. It is smaller and a more recent entrant than some of its peers but has approximately 50 salesforce.com resources. CoreMatrix has a deeper focus on process consulting (versus technology) than some of the other specialists in this space. CoreMatrix has a significant client base in industries including high-tech, banking and financial services, and life sciences. CoreMatrix is 100% focused on North America and is 100% focused on SaaS, significantly SFDC and AppExchange apps like Aprimo (marketing) and other front-office applications.

### Contenders Are Developing In A Rapid Market

- **HCL.** HCL provides a range of services for salesforce.com clients spanning strategy work through to technical development. HCL has implemented a mix of larger, more complex projects as well as midsize projects, with work in banking, financial services, and insurance (BFSI), and life sciences. HCL has focused mostly on developing platform technology and tools that can help with SFDC rollouts, in areas like testing, instance consolidation, and Java integration. HCL also offers general consulting services around cloud maturity and readiness, such as the Cloud Readiness Index (CRI). HCL's SFDC resources are primarily located offshore (mostly in India), but it also maintains local resources.

## SUPPLEMENTAL MATERIAL

### Online Resource

The online version of Figure 2 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

### Data Sources Used In This Forrester Wave

Forrester used a combination of two data sources to assess the strengths and weaknesses of each solution:

- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.
- **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with three of each vendor's current customers.

### The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve.

## ENDNOTES

- <sup>1</sup> Forrester recently surveyed 42 clients that are using third-party systems integration support for rollout of software-as-a-service (SaaS) solutions such as salesforce.com, Workday, and Google Apps. This data reveals that salesforce.com represents the lion's share of today's implementation support requirements. The data

also shows that despite SaaS' reputation for being simple, SaaS solutions are not necessarily quick, point-and-click installs; many large-scale global projects took more than one year, and some even required more than 50 resources. See the November 22, 2010, "Best Practices: SaaS Systems Integration" report.

- <sup>2</sup> Forrester invited numerous other providers to the Wave process but many declined because their offerings are too new or too quickly evolving. Others were screened out due to our size and revenue cutoffs. Some of the providers we spoke with for the report who were not formally evaluated were: Aggressor, Capgemini, Cloud Sherpas, Collaborative Solutions, CSC, DayNine, Dell, Dito, EDL Consulting, HP, IBM, PwC, Sada Systems, Serene, Sierra Atlantic, and UST Global.
- <sup>3</sup> Source: Marc Benioff's keynote speech, Dreamforce 2009 (<http://dreamforce.appirio.com/2009/11/dreamforce-day-2-keynote-part-2.html>).

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