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# The Forrester Wave™: IT Asset Life-Cycle Management, Q2 2009

by Evelyn Hubbert

for IT Infrastructure & Operations Professionals



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CA And BMC Software Top The Leaders' Stack, With HP And IBM Close Behind

by **Evelyn Hubbert**

with Peter O'Neill and Ben Echols

### EXECUTIVE SUMMARY

In Forrester's 81-criteria evaluation of IT asset life-cycle management (ITALM) vendors, we found that CA and BMC Software came out on top because of their strong end-to-end offerings and their excellent product vision. HP is a leader due to its balanced functionality and strong solution architecture. IBM stands out for its usability and strong contract management functionality. Service-now.com has a solid offering for clients who are looking for a pure software-as-a-service (SaaS) solution. Avocent's LANDesk Software stands out for the easy integration of its workflow into existing procurement solutions. Eracent has a well-balanced solution across all the different categories. PS'Soft (a BDNA company) has a strong offering and has extended its installed base — the recent merger with BDNA will greatly help it reach clients across the globe. Symantec shines with its Resource Association Diagram showing relationships between users, locations, departments, cost centers, and assets. USU Software is extremely function-rich and able to compete well with the rest of the full-blown IT asset lifecycle management and IT service management (ITSM) suites out there. Novell is less focused on vendor management but has a strong solution with full emphasis on license management.

### TABLE OF CONTENTS

- 2 **IT Asset Life-Cycle Management Is A Must**
- 5 **IT Asset Life-Cycle Management Evaluation Overview**
- 10 **Vendor Profiles**
- 12 **Supplemental Material**

### NOTES & RESOURCES

Forrester conducted product evaluations in December 2008 and interviewed 11 vendor companies: Avocent's LANDesk Software, BDNA, BMC Software, CA, Eracent, HP, IBM, Novell, Service-now.com, Symantec, and USU Software.

#### **Related Research Documents**

["Cover Your Assets: Use IT Asset Life-Cycle Management To Control IT Costs"](#)

December 24, 2008

["Why IT Service Management Should Matter To You"](#)

September 16, 2008

["The Forrester Wave™: IT Asset Management, Q3 2006"](#)

August 4, 2006

## IT ASSET LIFE-CYCLE MANAGEMENT IS A MUST

Current demand from Forrester clients on the subject of IT asset life-cycle management (ITALM) mostly focuses on best practices, organizational questions, and how to get started. Many organizations have already implemented ITALM, but nearly half of larger enterprises — companies with annual revenues of more than \$1 billion — still have not fully implemented this process; in smaller companies, this percentage is even greater.<sup>1</sup> The market forecast for IT asset life-cycle management showed growth of 28% from 2007 to 2008, and Forrester predicts 24% growth from 2008 to 2009. That means that the software market for IT asset life-cycle management will have grown from \$433 million in 2005 to \$1.04 billion in 2009.<sup>2</sup>

## ITALM: A Pillar Of Your Service Management Initiative

Investments in ITALM projects — the accounting for all assets throughout their life cycle from procurement to disposal — are increasing as enterprises react to compliancy pressure and realize that good documentation of their IT “estate” is a foundation for many other goals they wish to achieve — especially the one of running IT as a business. IT organizations are dependant on IT assets, as they are core to their ability to deliver services. Delivering the best value for money in the management of IT assets is complex and involves careful consideration of the tradeoffs between costs, performance, and risk across all the stages of the IT asset’s life cycle. As IT organizations continuously strive to deliver the right services at the right cost with the best quality to their customers, it is crucial that they manage their IT assets as a foundation for service delivery and service support. The reason is very simple: If you don’t know what you have in your estate, you can’t build and deliver sophisticated service levels. ITALM processes support the collection and provisioning of information about an organization’s IT portfolio. During a recent Webinar, Forrester found that less than 15% of more than 500 respondents said that they were halfway through a complete ITALM program, whereas 72% were either discussing and planning an ITALM program or in the strategy stage.<sup>3</sup>

IT organizations also need to implement ITALM for many other reasons. Enterprise executives, shareholders, and regulatory organizations all require an accurate record of all IT assets for financial control, information security, and compliance reasons. An enterprise’s IT estate can often account for 50% of the total enterprise asset base and sometimes as much as 80% of capital expenditure. Each ITALM project usually provides real cost savings for the enterprise — for example, by identifying unused software and hardware assets, providing more effective life-cycle management, and enabling better IT operations processing though better documentation.<sup>4</sup> A complete ITALM system:

- **Supports the full life cycle of an asset.** This is from planning through to procurement, operations — install/move/add/change — end of life, and disposal.
- **Contains a history of asset characteristics and configurations.** This includes RAM, hard drive space, processors, operating system (OS), applications, and file structure.

- **Manages all cost and contract data related to the asset.** This includes changes made throughout an asset's life within the organization.

And IT organizations with a full ITALM practice in place — meaning an organization, processes, and technology — can successfully support a range of important functions, including:

- **Procurement management.** This includes providing self-service to business users.
- **Financial management.** This involves recording the true cost of ownership and, ultimately, being equipped to charge back actual costs to business users.
- **Vendor management.** Collating business data and collecting performance data on vendors in a scorecard supports a strategic sourcing strategy.
- **Software license management.** This involves understanding where the licenses are consumed, aggregating costs, identifying potential savings, and ensuring license compliance and software access.
- **Contract management.** This provides a full view of all contract documents through the negotiation phase — allowing reuse in other negotiations — including leasing agreements, service agreements, purchase contracts, and warranty agreements; one of the largest opportunity costs is to find maintenance contracts for assets still under warranty.

So why hasn't everybody implemented ITALM yet? It is a strategic application that requires investment and involvement throughout the IT organization and even on the business side. Most silos in the IT organization already collect the data they need to support their own processes but not others, and the data may not be consistent across these silos. It thus requires an element of re-engineering and integration that many firms haven't been able to justify in the past 10 years.

### ITALM Is More Than Enterprise Asset Management

Many firms are happy to use their enterprise resource planning (ERP) apps for the bookkeeping/depreciation of IT assets and do not want to invest in a specific ITALM solution. And ERP vendors like Lawson Software, Oracle PeopleSoft, and SAP include ITALM in their solution scenarios. While integration between ERP and ITALM is certainly important, Forrester believes that a standalone management system for IT professionals is also necessary: ERP and ITALM systems and their users have differing priorities. IT users typically view the asset data through the life cycle of an IT asset, which is much more complex than other enterprise assets. They require configuration and characteristics data that no ERP-based system would be able to maintain at the required granularity. IT asset data collected in ERP solutions concentrates on the financial value of the asset to the organization. It generally reports this information to the general ledger that keeps track of the capitalization and depreciation of the asset through the organization. Accountants usually require a consolidated view of the assets and are rarely interested in the costs of individual IT assets.

### IT Asset Life-Cycle Management Needs Structure, Process, And Ownership

An ITALM program should be primarily designed to support the delivery of an organizational strategic plan in order to meet the expectations of a variety of stakeholders. The stakeholders in an organization have many issues, such as:

- **Managing risk.** Is the organization compliant with all software license agreements? Is the organization prepared for an unexpected audit of software compliance?
- **Reducing costs.** What is the organization spending on assets as a baseline? Where and by how much does the organization over- or under-spend on IT assets? Can unnecessary software license costs be eliminated? Is the organization managing its maintenance contracts efficiently? How are the leases affecting the yearly budget?
- **Gaining control of assets.** Do the IT asset management processes enable and ensure the security and/or loss prevention of assets? Is there an effective way to manage the install/move/add/change (IMAC) processes across the organization?
- **Increasing accountability.** Does the organization understand the current state and ownership with regard to IT asset management? Is the IT organization able to make strategic business decisions about assets that support the demands of the business?
- **Improving business performance.** Are the processes around IT assets effectively integrated to provide accurate and timely information? Are the processes managed effectively and optimized?

IT service and support departments have realized that they need to change from being cost centers into business units capable of delivering competitive advantage; as a result, IT assets have dramatically increased in importance. However, it is important to recognize that you can't establish an ITALM program by simply replacing manual, data-starved processes. Instead, you need to:

- **Develop real-time processes and integration.** To provide the organization with an accurate business-centric view of its existing IT assets at any time, you need to introduce and integrate processes to provide this data. As many organizations already have existing processes and a great deal of data, IT organizations must understand how asset data is processed, controlled, and accounted for and develop an integrated process across the entire asset life cycle.
- **Establish accountability and ownership.** Accountability helps ensure that you establish, maintain, and follow the right data, the right processes, and the right policies and procedures to support the variety of stakeholders with accurate and real-time IT asset information. The ITALM program and the measurement of the program's success must be owned by an organizational function and managed by an individual.

## IT ASSET LIFE-CYCLE MANAGEMENT EVALUATION OVERVIEW

The ITALM market consists of solutions that support IT organizations in the management of the life cycle of IT assets. ITALM is an end-to-end initiative that goes beyond the simple tracking of IT assets (physical/virtual and logical) to also account for financial, vendor management, contract management, and environmental aspects. It includes the creation and implementation of governance policies and procedures that are enforceable and can be used to gain greater control and enhanced management of assets' cost, compliance, liability, and performance. It would be easy to determine best practices for ITALM if everyone's existing IT infrastructure were the same and everyone's pain points or priorities were the same. But companies have different priorities and different processes, and they need to integrate a variety of other solutions into the ITALM process.

### The Breadth And Depth Of The Solution And Integration Are Key Selection Criteria

After examining past research, user need assessments, and vendors, we developed a comprehensive set of evaluation criteria. We evaluated solution vendors against 81 criteria, which we grouped into three high-level buckets:

- **Current offering.** We evaluated architecture, usability and complexity, physical management, license management, contractual management, vendor management, procurement functionalities, integration, financial management, and standards and interoperability.
- **Strategy.** We evaluated how each solution provider described its vision and its differentiation, along with its go-to-market strategy, geographic presence, cost, and the services available to support clients in their ITALM journey.
- **Market presence.** We evaluated the installed base and size of the vendors business (by revenues), and we also looked at how many customers are on maintenance contracts.

### The Evaluated Vendors Have Extensive Solutions

Forrester included 11 vendors in the assessment: Avocent's LANDesk Software, BDNA, BMC Software, CA, Eracent, HP, IBM, Novell, Service-now.com, Symantec, and USU Software. Each of these vendors has (see Figure 1):

- **Several years of market presence with a mature product.** The 11 vendors are a mix of large and small enterprises. However, they have all been present in the ITALM market for a number of years, and all have sizeable customer bases. Some of them have a stronger presence in Europe and are just now expanding into the Americas, while others have a very established presence worldwide.
- **Experienced a solid growth rate over the past year.** The market accelerated in 2008, influenced by client demand to manage their IT assets with better and more sophisticated tools.

- **Addressed one or more key market requirements.** This market is very mature from the solution perspective, and it therefore offers many different choices for clients. The challenge for clients lies in implementing a process-oriented approach for their ITALM subject area.

### Clients Must Also Address Requirements That Go Beyond The Solutions

When developing and executing their ITALM strategies, clients should certainly evaluate technologies that support ITALM. However, as the solutions all are very similar and all focus on the core of life-cycle management, maintenance and administration, software and hardware asset management, procurement and vendor management, maintenance and administration, and finally upgrade, disposal, and replacement steps, clients should also consider other key factors, such as:

- **Support.** What support services or consulting services will the company need to implement the ITALM strategy?
- **Location.** What are the pros and cons of in-house versus outsourced ITALM?
- **Integration.** What systems — such as supply chain, service desk, and procurement — need to be integrated into the ITALM strategy and solutions?

Upon answering these questions, clients should select a solution that matches their requirements.

**Figure 1** Evaluated Vendors: Product Information And Selection Criteria

<b>Vendor</b>	<b>Product(s) and version(s) evaluated</b>	<b>Version release date*</b>
Avocent's LANDesk Software	Avocent's LANDesk Asset Lifecycle Manager 3.0	October 2008
BDNA	BDNA/PS'Soft Asset Management Suite 8.6.3	October 2008
BMC Software	Remedy Asset Management 7.5	January 2009
CA	IT Client Manager 11.2, IT Asset Manager 12	July 2008, September 2008
Eracent	EnterpriseAM 9.1	Q4 2008
HP	Asset Manager 5.10	September 2008
IBM	Tivoli Asset Management for IT 7.1	May 2008
Novell	ZENworks Asset Management 10.1	August 2008
Service-now.com	Service-now.com Winter 2009	January 2009
Symantec	Altiris Service & Asset Management Suite 6.5	August 2007
USU Software	Valuation 3.5	August 2008

\* All products were generally available by January 20, 2009

**Vendor selection criteria**

The vendor has an ITALM repository capable of supporting enterprise environments with 1,000+ employees.

The vendor's solution must support the following:

- Hardware and software tracking
- Procurement and vendor management
- Financial management
- Life-cycle management
- Automation capabilities
- IT asset optimization
- Integration with ITSM solutions

The vendor's solution must be generally available by January 20, 2009.

The vendor must be able to provide customer references who are using at least hardware and software tracking, procurement and vendor management, financial management, and life-cycle management.

Forrester clients frequently mention or inquire about the vendor.

Source: Forrester Research, Inc.

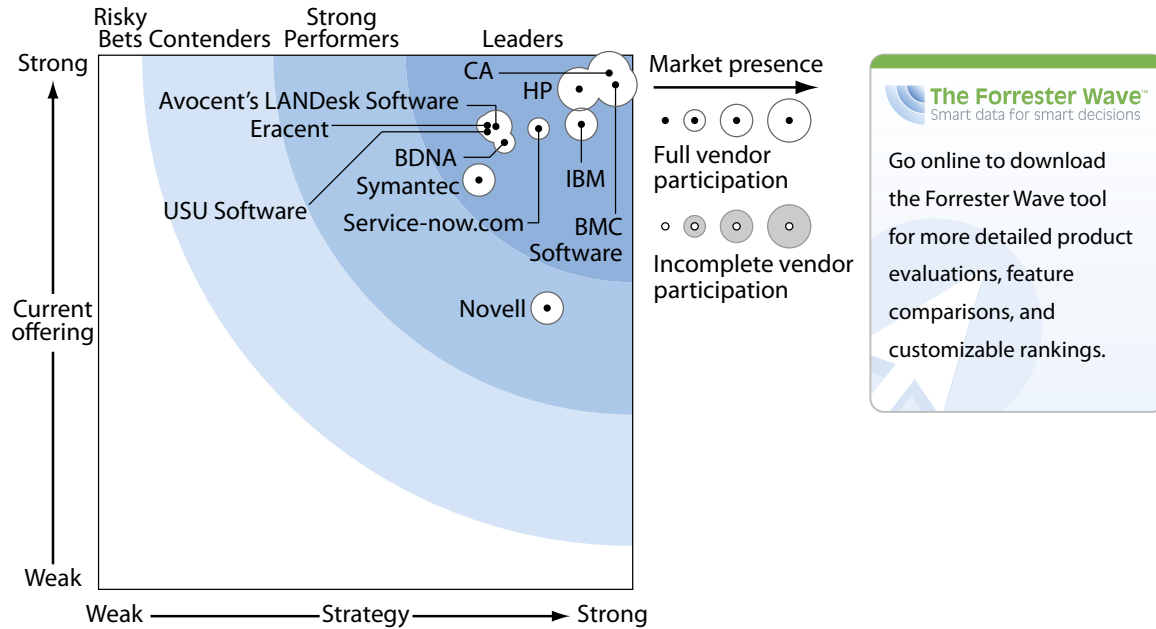
## Evaluation Analysis

Our evaluation uncovered a market in which (see Figure 2):

- **CA, BMC Software, HP, and IBM lead the pack with industrial-strength enterprise solutions.** Although all the solutions have the capability to manage the life cycle of IT assets, these companies have very strong suites that integrate well with existing service desk and ERP implementations. These companies have extensive resources, capable of consulting on and implementing global enterprise ITALM solutions; they can either provide this themselves or have extensive partners that can assist. Additionally, CA and BMC differentiate themselves among the top four with their ability to manage vendors and contracts. Vendor management is a critical component of a successful ITALM program, particularly in the current economic environment, and it takes significant time and resources to manage each relationship.
- **Service-now.com offers a pure software-as-a-service (SaaS) solution.** For clients who are interested in having their vendor manage and maintain the asset management application and associated infrastructure, Service-now.com has a very solid solution. The company has rapidly built up an impressive list of enterprise and midrange clients willing to run their ITALM functions in a similar manner to salesforce.com.
- **Eracent, Avocent's LANDesk Software, BDNA, and Symantec all have competitive offers.** Although not as highly rated on their market presence and strategy, all these solutions provide very strong competencies, proven methodologies, and significant technical breadth and depth. Customers praised Eracent for its deep connection to its clients. Avocent's recent string of recent acquisitions has contributed to LANDesk's growing prowess here, with Touchpaper being the latest purchase. The merger of BNDA and PS'Soft has brought together the best of two worlds, and they are ready to engage with customers across the world. Symantec's functionalities are solid across many of the subject areas.
- **USU Software and Novell are good solutions in combination with the rest of their suite.** USU's Valuation has several components covering the ITALM subject area. It offers a complete suite of fully integrated solutions that closely follow the ITIL model of IT service management, with ITALM as part of the solution set. The solution has strong financial management capabilities. The company has a very strong presence in EMEA, especially in Germany, but is pushing to increase its market presence in North America. Novell's ZENworks Asset Management solution is a great combination for physical asset management and license management. The solution is still missing functionality in the contract and vendor management subject areas.

This evaluation of the IT asset life-cycle management 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™: IT Asset Life-Cycle Management, Q2 2009



Source: Forrester Research, Inc.

**Figure 2** Forrester Wave™: IT Asset Life-Cycle Management, Q2 2009 (Cont.)

	Forrester's Weighting	Avocent's LANDesk Software	BDNA	BMC Software	CA	Eracent	HP	IBM	Novell	Service-now.com	Symantec	USU Software
<b>CURRENT OFFERING</b>	50%	4.31	4.16	4.70	4.81	4.32	4.66	4.33	2.61	4.29	3.81	4.26
Architecture	10%	4.00	4.20	5.00	5.00	4.80	5.00	4.00	2.20	4.30	2.90	4.60
Usability and complexity	10%	4.50	3.90	4.80	4.80	4.30	5.00	5.00	3.70	4.70	2.90	4.00
Physical management	15%	4.80	4.95	5.00	4.95	5.00	4.95	4.30	4.75	4.65	4.75	5.00
License management	15%	3.55	3.80	4.20	4.95	4.00	4.60	3.90	4.00	3.20	4.00	3.05
Contractual management	5%	4.65	4.35	4.65	5.00	4.35	4.15	4.70	2.60	4.65	4.35	4.35
Vendor management	10%	4.70	3.90	4.90	5.00	3.40	4.50	4.00	0.40	4.50	3.90	4.60
Procurement functionality	10%	5.00	4.40	4.40	4.40	4.40	4.70	4.40	2.00	5.00	4.40	4.40
Integration	10%	4.35	3.85	4.80	4.45	4.35	4.45	4.55	2.65	4.75	3.45	4.05
Financial management	10%	3.15	4.25	4.50	4.60	4.05	4.05	4.45	0.00	3.05	3.25	4.45
Standards and interoperability	5%	5.00	3.50	5.00	5.00	4.50	5.00	4.50	1.50	5.00	4.00	4.50
<b>STRATEGY</b>	50%	3.72	3.80	4.84	4.78	3.64	4.50	4.52	4.20	4.12	3.56	3.64
Solution	40%	3.20	3.20	4.60	4.60	3.80	5.00	4.60	3.40	5.00	3.20	3.80
Geographic presence	20%	3.80	3.20	5.00	5.00	1.60	4.20	3.80	4.80	3.00	2.00	2.40
Cost	20%	5.00	5.00	5.00	5.00	5.00	4.00	5.00	5.00	5.00	5.00	5.00
Services	20%	3.40	4.40	5.00	4.70	4.00	4.30	4.60	4.40	2.60	4.40	3.20
<b>MARKET PRESENCE</b>	0%	3.24	3.00	4.40	4.76	2.48	4.00	3.76	3.60	2.72	3.56	1.76
Installed base	60%	3.40	3.00	4.00	4.60	2.80	4.00	3.60	4.00	3.20	4.60	1.60
Revenue	40%	3.00	3.00	5.00	5.00	2.00	4.00	4.00	3.00	2.00	2.00	2.00

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

Source: Forrester Research, Inc.

## VENDOR PROFILES

### Leaders

- **CA.** Comprised of IT Client Manager, CA IT Asset Manager, and CA Service Accounting, this solution is a natural fit for organizations using CA enterprise management tools and for companies that are considering a well-rounded and extremely sophisticated ITALM solution.
- **BMC Software.** BMC's latest release — BMC Remedy Asset Management 7.5, which includes the BMC Atrium CMDB — has finally received attention from the development team. The company has made tremendous enhancements since its 7.1 version. This new version will place BMC on many shortlists for enterprise-class implementations — especially with those that have already implemented BMC's ITSM solution set.

- **HP.** HP has done a good job of combining Asset Manager with its discovery solutions and decision center to craft a well-functioning asset management portfolio. HP is continuously working on integrating additional pieces of its portfolio — such as a project portfolio management (PPM) tool from its Mercury acquisition — into its IT service management solution suite.
- **IBM.** Since IBM's formal entry into IT asset management in 2002, the company has worked on enhancements and modifications to its solutions; these have given it a good position in the ITALM market. The Tivoli business unit has integrated MRO Software after acquiring it in 2006, and both teams are working on integration, enhancements, and cross-selling the solutions to both the IBM installed base and non-IBM customers.
- **Service-now.com.** Service-now.com has introduced and improved its IT asset management SaaS solution together with its IT service management solution. The company has experienced tremendous growth and is a great option for clients who want ease of use and predictable costs when tackling ITALM.
- **BDNA.** As BDNA has just recently completed its acquisition of PS'Soft, the two companies are strongly positioned to take their solutions to their respective installed bases.<sup>5</sup> PS'Soft traditionally sold into the EMEA markets; as a result of BDNA's acquisition, it now has access to BDNA customers in other regions of the world.
- **Eracent.** This company has an outstanding reputation with clients who have purchased its ITALM solutions. The company formed in 2000, based on a tool developed in conjunction with Lucent Technologies. The company has an excellent out-of-the-box solution for clients who don't need a lot of customization but require a lot of high-end functionality, and it offers a powerful and frequently updated software signature database.
- **Avocent's LANDesk Software.** With Avocent's investment in the LANDesk product line, Avocent has established itself in the ITALM market via a significant expansion of its suite functionality to address the full life cycle of asset management. The LANDesk Asset Lifecycle Manager solution includes a process engine that enables great workflow modeling of ITALM.
- **Symantec.** The acquisition of Altiris in 2007 has given Symantec ITALM products that are built on a .NET architecture. Symantec is well positioned to support enterprise clients, but it typically sells its ITALM solution into medium-size enterprises that don't require extensive back-end integrations to other tool sets or purchasing modules.
- **USU Software.** This German company is continuously expanding and improving its solution set. The company just recently hired a new vice president who will work on aggressively expanding USU's presence into North America and other countries in Europe.

## Strong Performers

- **Novell.** Novell has entered the IT asset management market with its ZENworks Asset Management solution. Its latest version has strong features and fits well into clients' ZENworks configuration management suites.

## 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 two 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> Enterprise investment in BSM, including the necessary foundation technologies, has accelerated; as a result, Forrester has revised its estimates of the adoption rates of these subject areas in large enterprises. See the June 30, 2008, "[Business Service Management Market Update](#)" report.
- <sup>2</sup> The IT management software market continues to grow and is attractive to software vendors in other, more stagnant markets. See the March 27, 2009, "[Market Momentum: IT Management Software Market, H2 2008](#)" report.
- <sup>3</sup> Actual IT adoption of processes (like ITIL) to administer these tools is also lagging behind interest. See the September 16, 2008, "[Why IT Service Management Should Matter To You](#)" report.
- <sup>4</sup> IT asset life-cycle management cannot be ignored. Executives, shareholders, and regulators require an accurate record of all IT assets for financial control, information security, and compliance reasons. See the December 24, 2008, "[Cover Your Assets: Use IT Asset Life-Cycle Management To Control IT Costs](#)" report.
- <sup>5</sup> Forrester evaluated the PS'Soft solution in late 2008, but then PS'Soft merged with BDNA; we therefore decided to use the BDNA company name. The actual products evaluated are PS'Soft solutions.

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