

# The Forrester Wave™: Commerce Specialist Service Providers, Q4 2018

The Eight Providers That Matter Most And How They Stack Up

by Lily Varon

November 27, 2018

## Why Read This Report

In our 24-criteria evaluation of commerce specialist service providers, we identified the eight most significant ones — Astound Commerce, BORN Group, diconium, Gorilla Group, Isobar, LiveArea, Optaros by MRM//McCann, and Wunderman Commerce — and researched, analyzed, and scored them. This report shows how each provider measures up and helps digital business strategy professionals make the right choice.

## Key Takeaways

### **Gorilla Group And Isobar Lead The Pack**

Forrester's research uncovered a market in which Gorilla Group and Isobar are Leaders; Wunderman Commerce, Optaros by MRM//McCann, and BORN Group are Strong Performers; LiveArea and diconium are Contenders; and Astound Commerce is a Challenger.

### **Digital Business Strategy Pros Look For Speed, Focus, And A Provider They Can Trust**

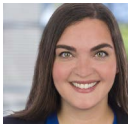
The commerce specialist service provider (CSSP) market is growing because more digital business strategy professionals see this segment of service providers as a way to address their top eCommerce challenges and to act as strategic partners.

### **Tech Focus, Design Expertise, And Culture Are Key Differentiators**

Commerce platform implementation services are maturing and becoming less differentiated, so improved commerce-adjacent technology expertise, design services, and company culture will dictate which providers will lead the pack in the coming years.

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### Related Research Documents

- [The Forrester Wave™: B2B Commerce Suites, Q3 2018](#)
- [The Forrester Wave™: B2C Commerce Suites, Q3 2018](#)
- [Now Tech: Commerce Service Providers, Q2 2018](#)



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## Commerce Specialists Bring Stellar eCommerce Experiences To Life

Digital business professionals seek services from commerce specialist service providers to design, build, and manage digital commerce experiences. While the largest service providers (e.g., Accenture and Deloitte) also provide commerce services, firms often seek a broader set of services from these potential partners to support their digital transformations. The commerce specialists in this evaluation are focused on delivering strategy, creative, and technology services almost exclusively on commerce technology.<sup>1</sup> The best commerce specialist services providers deliver:

- › **“Just right” eCommerce tech focus.** The concentration on commerce means replatforming projects won’t snowball into far-reaching (and potentially slow-moving) digital transformation projects. The commerce work that commerce specialist services providers do is often concentrated on two to three platforms. This expertise gives these firms enough exposure to provide their clients with informed guidance, plus enough focus to build the expertise on each platform with the accelerators and code libraries to match.
- › **A consistent team.** It’s not unusual for digital business pros to experience a change in their service provider team after they sign on as a client — and perhaps again after an implementation project moves into an ongoing managed services relationship. However, many of these specialists introduce their account team and project team in the presales process in a “Get to know your team” effort. And as much as possible, this team stays consistent across the ebbs and flows of the engagement with that client.
- › **Strategic commerce partnership.** In addition to focused commerce technology acumen and deep industry expertise, digital business strategy pros are looking for commerce specialists who will be strategic partners for their digital commerce businesses. Often, they assess this capability in the presales process by seeing which firm aligns with their values. Whether it’s demonstrating integrity or an appetite for innovation, clients are using more qualitative and emotional assessments to determine which firm will be a true partner that has their best interests at heart and will get the project done.

## Evaluation Summary

To assess the state of the commerce specialist service provider market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top commerce specialist service providers. After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria.

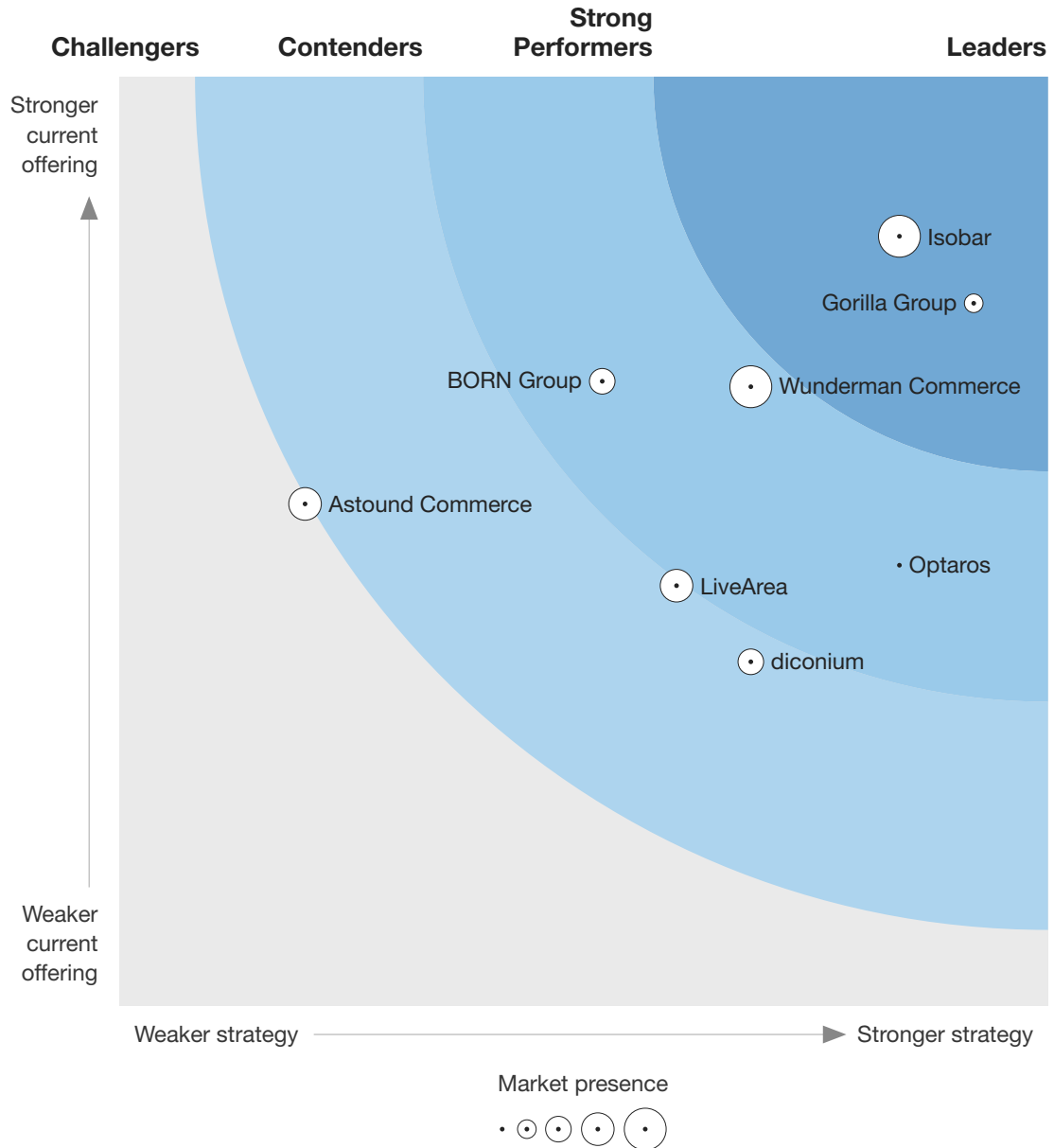
We intend this evaluation of the commerce specialist service providers market to be a starting point only and encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

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**FIGURE 1** Forrester Wave™: Commerce Specialist Service Providers, Q4 2018**THE FORRESTER WAVE™****Commerce Specialist Service Providers**

Q4 2018



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**FIGURE 2** Forrester Wave™: Commerce Specialist Service Providers Scorecard, Q4 2018

	Forrester's weighting	Astound Commerce	BORN Group	diconium	Gorilla Group	Isobar	LiveArea	Optaros	Wunderman Commerce
<b>Current offering</b>	50%	2.70	3.36	1.85	3.78	4.14	2.26	2.37	3.33
Design capabilities	20%	3.00	5.00	1.00	5.00	5.00	3.00	3.00	5.00
Advisory and consulting	20%	3.00	5.00	1.00	5.00	5.00	3.00	3.00	3.00
Hosting and associated services	5%	3.00	3.00	0.00	5.00	5.00	3.00	0.00	0.00
Ongoing support	5%	1.00	3.00	1.00	3.00	3.00	3.00	3.00	3.00
Public omnichannel commerce proof points	10%	0.00	1.00	3.00	5.00	3.00	1.00	3.00	3.00
Services delivery models and tools	20%	2.70	2.40	2.30	2.50	3.80	1.60	2.60	2.60
Product services related to commerce	20%	3.80	2.40	3.20	1.90	3.40	1.70	1.00	3.80
<b>Strategy</b>	50%	1.00	2.60	3.40	4.60	4.20	3.00	4.20	3.40
Vision	20%	1.00	3.00	3.00	5.00	5.00	3.00	5.00	3.00
Market approach	20%	1.00	3.00	1.00	5.00	3.00	5.00	5.00	5.00
Innovation road map	20%	1.00	1.00	5.00	3.00	5.00	1.00	3.00	3.00
Partner ecosystem	20%	1.00	3.00	3.00	5.00	5.00	3.00	5.00	5.00
Commercial models and pricing	20%	1.00	3.00	5.00	5.00	3.00	3.00	3.00	1.00
<b>Market presence</b>	0%	4.00	3.00	3.00	2.00	4.50	3.50	1.00	4.50
Number of customers	25%	5.00	3.00	1.00	3.00	5.00	3.00	1.00	5.00
Number of commerce projects	25%	3.00	3.00	5.00	3.00	3.00	5.00	1.00	5.00
Headcount dedicated to commerce	25%	5.00	3.00	3.00	1.00	5.00	3.00	1.00	3.00
Number of projects over US\$500,000	25%	3.00	3.00	3.00	1.00	5.00	3.00	1.00	5.00

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

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## Vendor Offerings

Forrester included eight vendors in this assessment: Astound Commerce, BORN Group, diconium, Gorilla Group, Isobar, LiveArea, Optaros by MRM//McCann, and Wunderman Commerce (see Figure 3).

**FIGURE 3** Evaluated Vendors

Vendor
Astound Commerce
BORN Group
diconium
Gorilla Group
Isobar
LiveArea
Optaros by MRM//McCann
Wunderman Commerce

## Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

### Leaders

- › **Gorilla Group is a fast-moving firm that excels in solving B2B eCommerce problems.** This Chicago-based firm has offices (with development) in the US, Canada, Poland, and Ukraine. Gorilla began as a traditional technology services firm around commerce (mainly Magento and SAP Commerce) and has gradually built additional services. In recent years, it has acquired a B2B content marketing firm and a Salesforce Marketing Cloud services firm. During this evaluation, Wunderman Commerce (a part of the WPP network, also evaluated in this Forrester Wave™) acquired Gorilla Group, extending the geographic footprint of each firm's commerce practices: Wunderman's into the US, and Gorilla's into Europe. Both firms stand to benefit. For Gorilla, the acquisition will also bolster its offerings if it can capitalize on the marketing and digital experience management of other firms in the WPP network.

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Gorilla Group is focused and fast. The firm has B2C customers but shines in supporting the eCommerce needs of B2B firms. One customer explained, “Their approach screamed that they understood the unique strategic advantage of digital for us.” Reference customers echoed this sentiment across the board: They are satisfied with Gorilla’s commerce technical acumen but choose Gorilla because of the transparency and forthrightness in their interactions, and they begin the partnership during the sales process rather than after the ink on the contract has dried. These customers expressed some downsides to the speed at which Gorilla executes, saying it can lead to issues like work done based on wrong assumptions, change orders, and additional costs. Gorilla Group is a best fit for B2B firms looking for a straight-shooting, fast-moving firm with strong eCommerce technical chops.

- › **Isobar has broad service offerings and a global footprint to deliver on them.** Part of the Dentsu Aegis Network (DAN), London-headquartered Isobar is the largest firm we evaluated in this research. In recent years, it has acquired two commerce service providers, one in Europe and one in Asia. Between Isobar’s size and global spread, its service offerings extend beyond commerce technology, most notably into digital experience technology. We also evaluated it in the digital experience service provider Forrester Wave.<sup>2</sup> The global vision and broad service offerings, coupled with the footprint to support these offerings (including delivery centers across most continents), set Isobar apart from other firms in this evaluation.

Isobar’s services excel in fusing creative and commerce. One customer explained: “I’ve worked with other agencies where they present a beautiful layout, and as soon as the creative team leaves and the tech team comes in, the project loses momentum. [By contrast] Isobar did not.” Isobar’s reference customers also loved the firm’s visionary strategic consulting, which extends beyond commerce technology. For example, customers sought support with brick-and-mortar retail transformations and help with strategy and execution on eCommerce globalization initiatives, especially in Asia Pacific. That said, reference customers did lament that this scale comes at the cost of speed and agility, noting that they just can’t seem to move as fast as they need to with the processes that Isobar currently has in place. Isobar is a good fit for firms that are looking for a strategic partner that has a global reach and the ability to support initiatives beyond commerce, especially in strategy, experience design, and technology services.

**Strong Performers**

- › **Wunderman Commerce is an industry expert that is early in expanding its offering.** Formerly known as Salmon, Wunderman Commerce is a UK-based commerce strategy and technology services company in the WPP network.<sup>3</sup> It has offices with development capabilities in the US, the Netherlands, Luxembourg, India, China, Singapore, and Australia. It supports multiple platforms but is one of the few firms in this evaluation that has a mature IBM WebSphere practice and offers services around Amazon Marketplace.<sup>4</sup> In September 2018, Wunderman Commerce acquired fellow Forrester Wave participant Gorilla Group, extending its practice into the US and B2B commerce services.

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The firm's service offerings extend beyond direct-to-consumer eCommerce technical services, especially in the retail, luxury, and grocery categories. Customers rely on its services for developing digital offerings to sell via online marketplaces and to wholesale retail partners. Reference customers loved the company's pragmatic approach. As one customer noted: "They're careful about the type of resource they add to our team. They think about who the right fit is from a culture perspective." Multiple reference customers remarked that a key relationship success driver is the consistency in the Wunderman people with whom they work. Reference customers thought Wunderman could mature the business outside of the eCommerce realm (one noted project management was an area to develop) and would like to see more on innovation and emerging technologies. Wunderman is a best fit for firms already using services from other companies in the WPP network, but also for retailers and brands looking for a partner that acts like it's part of their team.

- › **Optaros by MRM//McCann delivers "agency plus SI" work but has a narrow focus.** New York-based Optaros has been a part of the Interpublic Group (IPG) network since MRM//McCann acquired it in 2014. Optaros by MRM//McCann has delivery centers in the US, the UK, Germany, and Romania. In addition to large, mature eCommerce firms, it also serves large companies with minimal existing online revenues. It's the smallest firm in our evaluation in terms of number of commerce services full-time equivalents (FTEs). Historically, it has grown organically versus via acquisition, which has fostered a cohesive company culture but also has hindered the growth of its service offerings in other commerce-adjacent strategies and technologies. For some of those areas, like traditional marketing and advertising agency work, it relies on MRM//McCann.

Optaros and MRM//McCann have done a good job ironing out the operating model details between themselves and the different business units within the IPG network (i.e., clear demarcation where one group leaves off and the other picks up), but it's still a work in progress. While the demarcation provides clarity, it doesn't always feel like one big team working together for customers. But reference customers were in unanimous agreement that the firm operates with integrity — which is one of the biggest drivers of their satisfaction. One customer said, "It's always relationship first." Optaros by MRM//McCann is an obvious choice for MRM//McCann customers but is also a good fit for firms, especially in CPG and manufacturing, that may have the complexities of a large firm but are early in their eCommerce journeys.

- › **BORN Group is strong in eCommerce and design, must focus on consistent delivery.** New York-based BORN Group is privately held and not part of an agency network. Its focus is on eCommerce technology and the use of content to optimize commerce experiences — namely around Salesforce Commerce Cloud (SFCC), Adobe/Magento, and SAP Commerce. BORN is in the early stages of expanding its services to areas like order management systems and analytics. It has delivery centers in New York, London, India, Singapore, and Tokyo. Notably, BORN is one of the only vendors in this evaluation building up a practice around enterprise resource planning (ERP), which will enable its customers to leverage one provider for commerce and back-office systems integration (SI) work without sacrificing the quality of the front-end design and UX.



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Reference customers love the team's eCommerce strategic and technical prowess and the prebuilt eCommerce accelerators that speed time-to-market for commerce implementations. One customer observed, "They are thought leaders when it comes to the eCommerce platform." Reference customers also commend the work ethic of their BORN team, saying, "They really have consistently gone above and beyond." This includes providing proactive strategic consultation for their customers. Reference customers lamented that BORN Group resources are stretched thin, and the early-stage maturity in areas like digital marketing and omnichannel initiatives limits the firm's role as a strategic partner outside eCommerce initiatives today. BORN Group is a best fit for firms looking for a consultative and design-oriented commerce technology services provider.

## Contenders

- › **LiveArea shines in helping firms operationalize their strategies, but it's in transition.** Dallas-based LiveArea is the professional services arm of full-service eCommerce firm PFSweb.<sup>5</sup> PFSweb still offers eCommerce outsourcing services (e.g., fulfillment, call center), but after acquiring digital agency LiveAreaLabs in 2014, it's bundled its strategy, digital marketing, UX, creative, and SI services into a subsidiary, LiveArea.<sup>6</sup> Its commerce expertise includes multiple platforms, especially SFCC, IBM WebSphere, and SAP Commerce. It has worked with order management systems more extensively than its competitors in the space. The firm has development centers in the US, UK, Bulgaria, and India.

LiveArea shines in operationalizing a strategy. Reference customers love the flexibility and collaboration they get from the LiveArea team that lets them accomplish a lot of work even in "unrealistic time frames." Being goal-oriented has led to a culture of honesty. As one customer observed, "They're not going to boil the ocean or make an enormous thing unnecessarily." But a lack of visibility is an indicator of its eCommerce outsourcing days. One reference customer said that its more agile way of working has made it harder to estimate and communicate costs, which in turn makes it harder for the customer to defend the relationship to a cost-focused procurement department. Another reference customer said they'd like better support on an ongoing basis for site performance monitoring and optimization services. LiveArea is a best fit for B2C firms, especially brands that need a partner with eCommerce and order management expertise, or firms that need to outsource elements of their eCommerce operations (e.g., fulfillment, call center).

- › **Diconium has an innovation focus and tight vendor partnerships but lags in design.** Germany-based diconium (pronounced DIH-cone-ee-um) is one of the few non-US-based firms in this evaluation. It has a clear focus on innovation, having made investments in academic partnerships and hired significantly for its artificial intelligence (AI) practice. By contrast, it is less focused on creative design and formal strategic consulting than others in this evaluation and instead has focused on broadening its tech services work to emerging and commerce-adjacent technologies (e.g., AI, order management).

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Reference customers cited that diconium's main challenges are scaling to support the needs of enterprise customers while continuing to maintain the quality of delivery and efficiency of operations. They loved how closely diconium is aligned with their commerce technology partners, namely SAP and Intershop, which increases efficiency and collaboration. One noted, "They know what's coming and reduce duplicative work." Another raved, "If something needs to be escalated, they know exactly who at [the vendor] to contact, and they resolve it well because they have a good working relationship with [the vendor]." Diconium is a best fit for firms in the industrial manufacturing (especially automotive) or financial services industries or for firms looking for a partner with broad technical expertise and an especially strong focus on artificial intelligence.

## Challengers

- › **Astound Commerce excels at tech services but must accelerate its strategy.** Privately held, San Francisco-based Astound Commerce has always focused on commerce technology implementation and support services. It is best known for its commerce services around Salesforce Commerce Cloud and has dedicated a significant portion of its resources to the platform. Its historical focus on core tech services is about to change: It recently acquired digital engagement agency Groove (October 2017) and digital agency Fluid (March 2018), which will beef up the digital marketing and creative design services available to customers once the services are fully integrated.

Astound still has a ways to go to broaden its services with creative design and strategy support more broadly — and the Groove and Fluid acquisitions are big steps in the right direction. Reference customers tell us they would welcome a more proactively consultative process to help them with more than just the technical challenges. That said, they can't say enough good things about its technical services. As one noted, "They've really perfected the offshore model" with a talented and tenured development organization (primarily in Bulgaria, Columbia, Slovakia, and Ukraine) that has minimal attrition. Reference customers were especially pleased with the development work around Salesforce Commerce Cloud — one cites, "[The code had] fewer bugs than I've ever seen." Astound Commerce is well suited to B2C retailers and brands with a strong digital commerce vision and the need for technical execution, especially if they're using Salesforce Commerce Cloud.

## Evaluation Overview

The Forrester Wave follows a publicly available methodology that involves screening vendors, detailed questionnaires, and customer reference checks. Find more information about the methodology in the supplemental material section of this report.

We evaluated vendors against 24 criteria, which we grouped into three high-level buckets:

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- › **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include services delivery models and tools, public omnichannel proof points, and capabilities for major products related to commerce.
- › **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated vision, market approach, innovation road map, partner ecosystem, and commerce models and pricing.
- › **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's number of commerce services customers, projects, and headcount.

### Evaluated Vendors And Inclusion Criteria

Forrester included eight vendors in the assessment: Astound Commerce, BORN Group, diconium, Gorilla Group, Isobar, LiveArea, Optaros by MRM//McCann, and Wunderman Commerce. Each of these vendors has:

- › **A focus on commerce services.** These firms have a strategic focus on building, implementing, and integrating commerce technology on behalf of their clients. These providers have fewer than 2,000 FTEs but more than 50 FTEs for commerce technology practice. While the largest systems integrators also implement commerce technology, our evaluation focused on the smaller firms, where commerce services work plays a larger role in their overall business.
- › **A practice around various applications of interest to Forrester's clients.** For this evaluation, these commerce services were not heavily concentrated on one commerce platform or on commerce platforms targeting small and medium-size businesses.
- › **Consistent interest from Forrester's clients.** Forrester enterprise clients regularly mention or express interest in working with these vendors for commerce services.

In addition to focused commerce technology acumen and deep industry expertise, digital business strategy pros want strategic partnership from commerce specialists.

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## Supplemental Material

### Online Resource

We publish all of our scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; access this tool by clicking the link the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs.

### The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows [The Forrester Wave™ Methodology Guide](#) to evaluate participating vendors.

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In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on a small number of inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors. In accordance with the [Forrester Wave™ Vendor Review Policy](#), Forrester asks vendors to review our findings prior to publishing to check for accuracy.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave document. We evaluated the vendors participating in this Forrester Wave using materials that they provided to us by August 2018 and did not allow additional information after that point. We encourage readers to consider how the market and vendor offerings change over time.

Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors to the best of our ability according to our [Forrester Wave™ Incomplete Vendor Participation Policy](#) and publish their positioning along with participating vendors.

### Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the [Integrity Policy](#) posted on our website.

## Endnotes

- <sup>1</sup> See the Forrester report "[The Forrester Wave™: B2C Commerce Suites, Q3 2018](#)" and see the Forrester report "[The Forrester Wave™: B2B Commerce Suites, Q3 2018](#)."
- <sup>2</sup> See the Forrester report "[The Forrester Wave™: Digital Experience Service Providers, Q4 2017](#)" and see the Forrester report "[The Forrester Wave™: Midsize Digital Experience Agencies, Q4 2018](#)."
- <sup>3</sup> Source: "WPP acquires Salmon, a leading multinational eCommerce digital agency," WPP press release, January 23, 2013 (<https://www.wpp.com/news/2013/01/wpp-acquires-salmon-a-leading-multinational-ecommerce>).
- <sup>4</sup> Source: "Wunderman Commerce Acquires 2Sales, An Amazon Consulting Agency," Wunderman Commerce press release, September 5, 2018 (<https://www.wundermancommerce.com/news/wunderman-commerce-acquires-2sales>).
- <sup>5</sup> See the Forrester report "[Market Overview: Full-Service eCommerce Solutions](#)."
- <sup>6</sup> UX: user experience; SI: systems integrator.

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