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# The Forrester Wave™: Business Performance Solutions, Q4 2009

by Paul D. Hamerman  
for Business Process & Applications Professionals



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IBM Cognos, Oracle, SAP, And SAS Lead, With Clarity Systems In Close Pursuit

by **Paul D. Hamerman**

with Connie Moore and Ralph Vitti

### EXECUTIVE SUMMARY

In Forrester's 89-criteria evaluation of business performance solutions (BPS) vendors, we found that IBM Cognos, Oracle, SAP, and SAS Institute led the pack because of their breadth of functionality and strength of their business intelligence (BI) foundations. SAP earned the highest current offering score, and IBM Cognos earned the highest strategy score, with Oracle having the best combination of both. Clarity Systems led the Strong Performers group with impressive planning and financial reporting capabilities. Infor was a solid Strong Performer as well, demonstrating very good functional capabilities for planning, consolidations, and performance measurement. Tagetik, a CFO-focused player from Italy, showed sophisticated financial modeling capabilities and an excellent consolidations solution. Host Analytics, the only software-as-a-service (SaaS) pure-play provider in the Forrester Wave™ peer group, had a well-rounded offering and a clear vision and strategy for BPS. Board International and Longview Solutions demonstrated the potential to play well in the BPS market as their latest releases gain maturity.

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In July 2009, Forrester conducted product evaluations of the 10 vendors participating in the Forrester Wave: Board International, Clarity Systems, Host Analytics, IBM Cognos, Infor, Longview Solutions, Oracle, SAP, SAS Institute, and Tagetik.

#### Related Research Documents

["TechRadar™ For BP&A Professionals: Financial Management Applications, Q2 2009"](#)

June 30, 2009

["Business Performance Solutions: Clash Of The Titans"](#)

January 20, 2009

["Measuring And Aligning Business Performance"](#)

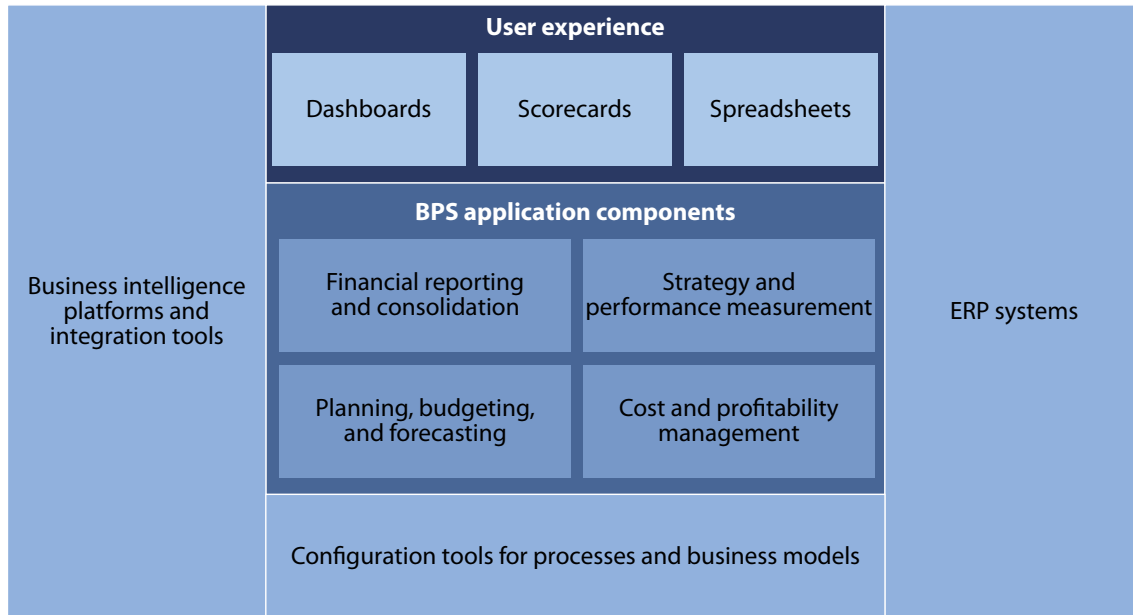
April 2, 2008

## BPS ADDRESSES MISSION-CRITICAL PLANNING AND MEASUREMENT PROCESSES

Business performance management consists of a set of processes, frameworks, and systems for activities such as planning, measuring, communicating, and monitoring business results (see Figure 1). Enterprises typically link these activities to corporate strategies and objectives and might drive them down to many individuals within the organization to encourage accountability and control. Forrester defines business performance solutions as a category of purpose-built software applications that support these activities. The major BPS functional elements include the following:

- **Strategy and performance measurement address goals, objectives, and accountability.** A strategy management application supports formal strategy management philosophies (e.g., the Balanced Scorecard) but might be adapted to a business' specific needs. Applications often display the strategy definition in visual strategy maps. *Scorecards* measure progress against the goals and objectives set forth in the strategy framework. Performance *dashboards* display more detailed information and allow drilling down to root-cause detail. Dashboards typically include a variety of key performance indicators (KPIs) that might include strategic scorecards as well as relevant comparisons against plans, budgets, forecasts, prior performance, and industry benchmark data.
- **Planning, budgeting, and forecasting solutions support multiple forward-looking processes.** Although used almost universally as a control on spending, budgeting regularly falls short in supporting performance initiatives — often the result of a rigorous and inflexible process, not due to a software shortcoming per se. Fortunately, in addition to budgeting, the planning solutions support a variety of scenario-based planning activities as well as forecasting processes that add value beyond that provided by traditional budgeting processes.
- **Cost and profitability management provides detailed analysis to improve margins.** This complex modeling activity helps organizations analyze development, production, and operating costs against revenues by product, customers, and lines of business. Cost and profitability management applications often use activity-based costing as a methodology to develop sophisticated cost and profitability analytical models.
- **Financial reporting and consolidation produce financial statements.** Financial reporting and consolidation applications produce reports focused on delivering financial statements based on accounting results for both external and internal audiences. Statutory consolidations support regulatory compliance and generally accepted accounting principles (GAAP) requirements. As compliance requirements evolve, these applications are embracing International Financial Reporting Standards (IFRS) and eXtensible Business Reporting Language (XBRL).<sup>1</sup>

**Figure 1** Business Performance Solutions Footprint



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Source: Forrester Research, Inc.

Although the functional elements described above align primarily with finance processes, enterprises can use strategy and performance measurement, as well as forecasting, to support all areas of the business. Many BPS product portfolios often include purpose-built performance management applications for nonfinance areas including human resources (HR), operations, supply chain, sales, and IT. All types of businesses and government organizations use BPS products, although considerable extension and adaptation to business requirements is often necessary.

BPS packages offer a level of configurability that puts control more squarely into the hands of the business stakeholders. Enterprises seeking BPS support should look for:

- **Compelling graphics and user interface features.** While some products rely heavily on a signature graphical paradigm, such as fuel gauges, customers need a selection of graphical looks to suit the information context. End users should have the ability to personalize the presentation of the graphical content by selecting the visualizations (e.g., symbols, colors, and charts) that bring the information to life.
- **Breadth of information.** The extent to which a BPS vendor embeds a comprehensive analytical data model differentiates many products. The data model should represent the full breadth of the business, from finance to sales and operations, as well as support a variety of business types. The solution should also enable organizations to compare certain KPIs to industry metrics via connections to external content publishers.

- **Flexibility and extensibility.** Every enterprise has a combination of needs ranging from common to unique, so the flexibility of the product to be configured (not customized) with nonstandard measurements is essential. Business requirements — from budgets, to forecasts, to profitability analysis — depend on the business users' abilities to model attributes such as hierarchical reporting structures, product families, business rules, process flows, mathematical formulas, and time frames.
- **Openness for integrating multiple data sources.** The product needs to be open at the data level to analyze information from multiple systems. Vendors typically embed or work with leading data integration and extract, transform, and load (ETL) tools to manage the diversity of data inputs to the system. The measurement applications ideally should allow access to underlying details within the data through drilling into the source data.

### BPS Vendors Come In All Shapes and Sizes

Three of the largest technology vendors play prominently in this market — IBM, Oracle, and SAP. These vendors have entered largely through acquisitions (i.e., Cognos, Hyperion, and BusinessObjects, respectively), but continue to evolve their offerings. Other large vendors in this market include SAS Institute, known primarily for its business analytics technology, and Infor, a large enterprise resource planning (ERP) software player. More specialized players in this Forrester Wave evaluation include vendors that focus on BPS exclusively — Clarity Systems, Host Analytics, Longview Solutions (a subsidiary of Exact Software), and Tagetik. Board International focuses on both BI and BPS with its rapid development toolkit approach.

There are also many other vendors playing in the BPS space (not included in the Forrester Wave based on inclusion requirements) that offer specific components. These include planning and budgeting solutions (e.g., Adaptive Planning, Centage, Lawson Software, and PROPHIX Software), cost and profitability management (e.g., Acorn Systems), and strategy and performance measurement solutions (e.g., ActiveStrategy, Actuate, Bitam, CorVu, Information Builders, MicroStrategy, MyDIALS, etc.).

### BPS Maintains Good Market Traction Despite The Recession

BPS has strong long-term growth prospects, and this software category has held up reasonably well in the current recession. Planning, forecasting, financial reporting, and performance measurement solutions have proven to be essential business tools to deal with economic uncertainty. Forecasting, especially, has helped companies cope with market volatility in the face of the economic slowdown and economic instability that now seem to be easing. Forrester predicts that total software revenues (licenses, maintenance, and subscriptions) in BPS will grow by a compound annual growth rate (CAGR) of 12.7% through 2012, increasing from \$2 billion in 2008 to \$3.2 billion in 2012.<sup>2</sup>

## BUSINESS PERFORMANCE SOLUTIONS EVALUATION OVERVIEW

To assess the state of the BPS market and see how the vendors stack up against one another, Forrester evaluated the strengths and weaknesses of top BPS vendors.

### Evaluation Criteria Focus On Core Functionality, Technology, Strategy, And Market Presence

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 89 criteria, which we grouped into three high-level buckets:

- **Current offering.** Our evaluation of current capabilities focused on the business process capabilities for budgeting, strategic planning, forecasting, financial consolidations and reporting, strategy management, performance measurement (e.g., scorecards and KPIs), cost and profitability management, and analytics applications. We also placed significant emphasis on technical capabilities, including the BI foundation as well as customer references.
- **Strategy.** We evaluated each vendor's go-to-market strategies in terms of overall vision, development plans, segmentation strategies, breadth of offering, time-to-value, and pricing transparency. Our strategy assessment also considered the technology vision, level of investment in research and development, and strategic alliances.
- **Market presence.** The market presence criteria, which determine the size of the symbol on the Forrester Wave graphic (but have no weight in terms of scoring), include vendor financial viability, the size of the customer base, and sales and implementation delivery footprint.

### Evaluated Vendors Include Software Titans As Well As BPS Specialists

Forrester included 10 vendors in the assessment: Board International, Clarity Systems, Host Analytics, IBM Cognos, Infor, Longview Solutions, Oracle, SAP, SAS Institute, and Tagetik. Each of these vendors has (see Figure 2):

- **A comprehensive BPS offering.** Each vendor invited to participate has a BPS offering that includes at least three of the four core BPS capabilities (planning and budgeting, financial consolidations, cost and profitability management, and strategy and performance measurement applications).
- **A substantial and referenceable customer base.** All vendors included in this Forrester Wave have annual revenues exceeding \$5 million and more than 100 customers in production using one or more components of their BPS offering.
- **Client inquiries that put the vendors on Forrester's radar.** The vendors included in this Forrester Wave are often discussed in client inquiries, appearing on client vendor selection shortlists.

All 10 vendors invited to participate in this Forrester Wave evaluation promptly accepted; none declined. By design, 10 vendors was the maximum number included in the evaluation, due to capacity considerations based on the number of criteria and the in-depth nature of the evaluation.

**Figure 2** Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product evaluated	Product version evaluated	Version release date
Board International	Board	7.0.1	April 2009
Clarity Systems	Clarity 6	6.5	May 2009
Host Analytics	Host Analytics Corporate Performance Management Suite	9.0	June 2009
IBM Cognos	IBM Cognos 8 BI	8.4	December 2008
	IBM Cognos 8 Controller	8.4	December 2008
	IBM Cognos 8 Planning	8.4	December 2008
	IBM Cognos TM1	9.4	December 2008
Infor	Infor PM	PM 10.1.3	August 2009
Longview Solutions	Longview Performance Management Platform	7	October 2009
Oracle	Oracle Enterprise Performance Management System	11.1	July 2008
SAP	SAP BusinessObjects EPM Solutions	EPM 7.5	September 2009
SAS Institute	SAS Activity Based Management	6.4	December 2007
	SAS Financial Management	5.1	September 2009
	SAS Human Capital Management	5.1	September 2009
	SAS Profitability Management	2.1	March 2009
	SAS Strategy Management	5.1	September 2009
Tagetik	Tagetik	3.0	June 2009

**Vendor selection criteria**

- Each vendor evaluated has a complete core BPS offering that includes at least three of the four core BPS capabilities (planning and budgeting, financial consolidations, cost and profitability management, and strategy and performance measurement applications).
- Vendors were required to have annual revenues currently exceeding \$5 million and a market presence demonstrated by at least 100 live customers using one or more components of the BPS solution.
- Vendors are financially viable and are frequently mentioned by clients in Forrester inquiries.

Source: Forrester Research, Inc.

## BPS OFFERINGS SHOW DEPTH AND MATURITY IN MOST AREAS

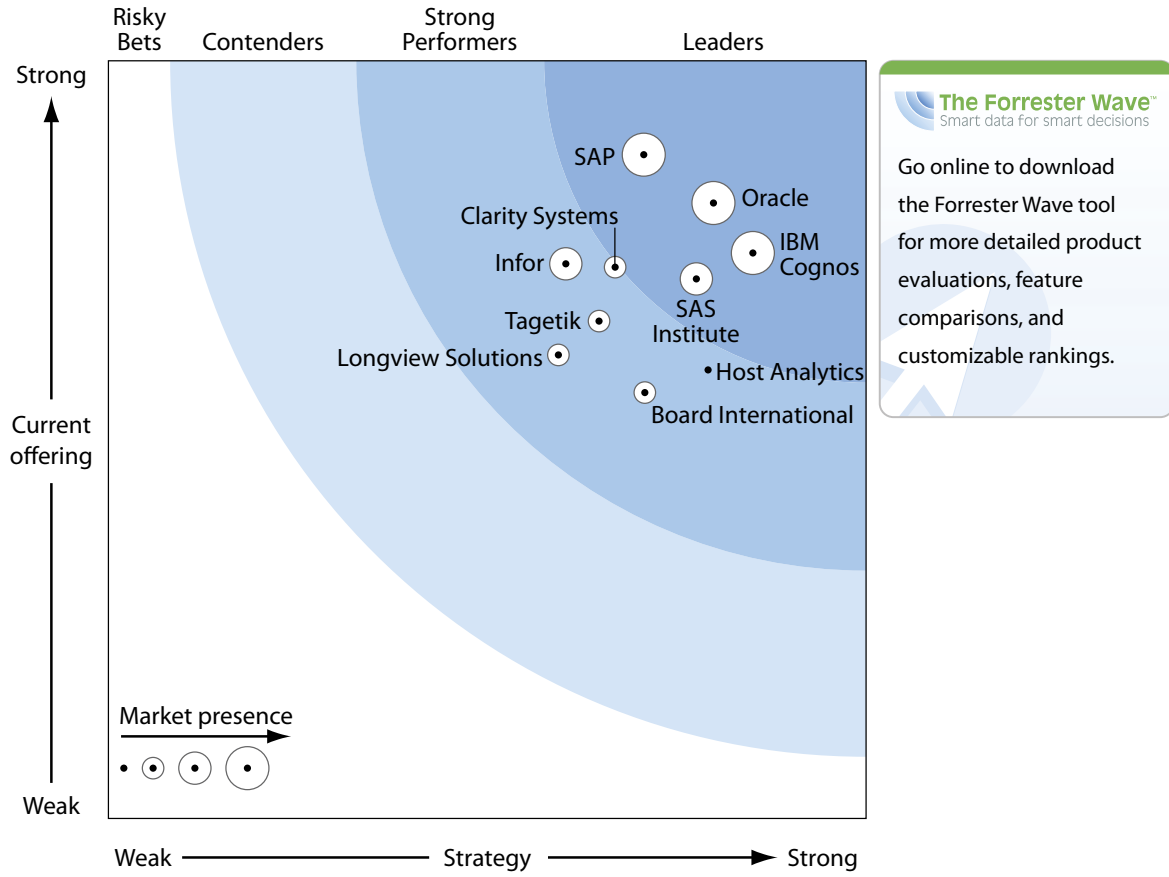
The evaluation uncovered a market in which (see Figure 3):

- **SAP, Oracle, IBM, and SAS Institute lead the pack.** SAP and Oracle compete head-to-head for leadership in BPS, both offering broad portfolios of BPS products with depth and maturity. IBM Cognos is still a top-tier player, but it is working through an aggressive road map to refresh its technical BPS foundation and regain some lost momentum. SAS Institute has sophisticated capabilities in cost and profitability, forecasting, and strategy management, and focuses on business issues well beyond the scope of finance.
- **Clarity Systems, Infor, Tagetik, and Host Analytics offer competitive options.** Clarity Systems is a strong pure-play provider in the BPS market, with first-tier planning capabilities and a differentiated offering for financial and regulatory reporting. Infor has extensive core functionality, complemented by a set of analytic dashboards and a role-based portal. Tagetik has established itself in Europe with top-tier financial planning, reporting, and analytical capabilities and is focusing on expanding its presence in North America. Host Analytics is differentiated in this market as an SaaS-only provider, with a good strategy and rapidly maturing BPS functionality.
- **Longview Solutions and Board International are evolving their BPS offerings.** Longview Solutions is rolling out a major new release, Longview 7, that is designed to replace its older Khalix versions. Board International offers a toolkit-based approach that allows its partners to rapidly develop customer-specific solutions and is evolving to provide more out-of-the-box capabilities.

This evaluation of the BPS 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 3** Forrester Wave™: Business Performance Solutions, Q4 '09



Source: Forrester Research, Inc.

**Figure 3** Forrester Wave™: Business Performance Solutions, Q4 '09 (Cont.)

	Forrester's weighting	Board International	Clarity Systems	Host Analytics	IBM Cognos	Infor	Longview Solutions	Oracle	SAP	SAS Institute	Tagetik
Current offering	50%	2.81	3.64	2.96	3.73	3.66	3.06	4.06	4.38	3.56	3.28
Planning and budgeting	25%	2.85	4.39	3.02	3.67	4.31	2.98	3.98	4.47	3.66	3.84
Financial consolidations and reporting	20%	2.20	3.80	2.50	3.60	3.80	3.30	4.40	4.30	3.20	4.00
Strategy and performance	18%	2.40	2.80	2.80	4.80	3.90	2.50	4.15	4.85	3.65	1.60
Cost and profitability analysis	8%	1.50	1.75	1.75	1.85	2.00	3.25	3.90	4.65	5.00	3.50
Functional and industry-specific performance management	2%	3.00	3.00	1.50	4.00	3.50	1.50	3.50	2.50	3.00	2.50
Business intelligence (BI) foundation	10%	4.15	3.45	3.25	4.60	3.40	3.50	4.50	4.80	4.10	2.90
Technology characteristics	10%	4.20	4.35	3.90	2.75	3.30	3.35	3.95	4.00	2.55	3.35
Hosting and outsourcing	2%	0.10	3.20	4.80	2.00	1.40	1.00	1.20	1.40	1.20	3.00
Customer support	5%	4.14	4.79	4.51	4.57	3.90	4.19	3.82	3.97	3.93	4.39
Strategy	50%	3.54	3.34	3.96	4.25	3.02	2.97	3.99	3.53	3.88	3.24
Product strategy and vision	65%	3.15	3.55	4.20	4.25	3.10	2.85	3.70	3.60	4.30	2.85
Technology strategy and vision	20%	5.00	3.00	4.00	5.00	3.00	4.00	5.00	3.00	3.00	4.00
R&D/product development	5%	3.00	3.00	5.00	3.00	1.00	3.00	3.00	3.00	4.00	5.00
Strategic alliances	10%	3.40	2.80	1.75	3.35	3.50	1.70	4.35	4.40	2.80	3.40
Market presence	0%	2.23	2.70	1.17	4.58	3.99	2.51	4.80	4.42	3.30	2.23
Financial viability	25%	2.32	4.00	1.66	5.00	3.67	3.34	5.00	4.67	4.00	2.32
Installed base	50%	2.30	1.90	1.00	4.40	3.90	2.10	4.60	4.00	2.60	1.80
Delivery footprint	25%	2.00	3.00	1.00	4.50	4.50	2.50	5.00	5.00	4.00	3.00

Note: All scores are based on a scale from 0 (weak) to 5 (strong).

Source: Forrester Research, Inc.

## VENDOR PROFILES

### Leaders Show Breadth And Market Presence

- **Oracle: building on the strength of its Hyperion product set.** Oracle's broad product set includes the market-leading financial consolidations solution, Oracle Hyperion Financial Management (HFM), as well as other strong product offerings within the Oracle Hyperion Enterprise Performance Management (EPM) family — Planning, Strategic Finance, Profitability and Cost Management (HPCM), and the Oracle Business Intelligence Applications (OBIA). Oracle's BI platforms and integration capabilities complement these solutions. Oracle plans to evolve this product portfolio with additional capabilities in financial close and disclosure management, as well as vertical solutions.
- **SAP: scoring with a best-of-breed product portfolio.** By combining its BPS assets with those of BusinessObjects nearly two years ago, SAP has developed first-rate capabilities in each of the four BPS core components, as well as an evolving set of analytical applications. Each of the four BPS components scored first or second in its respective category within the current offering criteria. SAP continues to move the portfolio forward with a road map to achieve user interface harmonization with a common process engine and metadata management.
- **IBM Cognos: shoring up its BPS foundation.** A perennial top-tier BPS player with mature BPS solutions, IBM Cognos is moving its solutions to an updated architecture featuring TM1 as the data engine. This architectural refresh, along with improvements to the application user experience, configuration tooling, and data integration, should help IBM Cognos reassert itself among the upper echelon of BPS. IBM Cognos has a broad portfolio of BPS products, including analytical applications and many purpose-built planning blueprints, as well as strong competencies in BI and reporting.
- **SAS Institute: the thought leader in strategy, forecasting, and costing.** With leading capabilities in cost and profitability management and predictive analytics, SAS Institute is a smart choice for sophisticated companies. The predictive technology supports complex planning and forecasting applications. SAS Institute also offers a broad set of analytical applications, which include solutions for IT, human capital management (HCM), and several other industries. While SAS Institute does not have as much market presence as the other BPS leaders, it has done an excellent job in establishing thought leadership related to strategy management and activity-based management.

### Strong Performers Offer Functional Depth And Flexible Application Toolkits

- **Clarity Systems: making its mark in planning and financial reporting.** As a pure-play BPS vendor, Clarity Systems is establishing a strong track record in planning and financial reporting. The software vendor's focus on addressing key issues for finance has led to the establishment of a top-tier planning solution, as well as a differentiated offering for automating the entire financial

reporting and regulatory filing process, including generation of XBRL statements and regulatory documents.

- **Host Analytics: banking on SaaS.** As the only vendor in the Forrester Wave peer group with an SaaS-only solution, Host Analytics has an attractive offering for midsize companies that want to deploy BPS rapidly and cost-effectively. The functionality of the Host Analytics solution has reached a good level of maturity around key BPS functions, and the company is poised for rapid growth.
- **Tagetik: laser-focused on financial process excellence.** Based in Italy, Tagetik has achieved significant success with large clients throughout Europe, and it is gaining traction in the US as well. The Tagetik 3.0 solution has very robust financial modeling capabilities for planning and profitability analysis, and the financial consolidation component of the suite is among the best that we have evaluated.
- **Infor: a strong competitor focused on its large applications customer base.** As one of the largest ERP vendors in the market (with \$2 billion in revenues and 70,000 customers), Infor has a solid BPS solution to sell into this installed base and also to the broader market. The Infor PM 10 product achieved good scores in planning, financial consolidations, and strategy and performance measurement. The offering is enhanced with a set of prepackaged analytic applications (Infor Decisions), as well a good reporting tool that is designed for business users.
- **Board International: rapid deployment with leading-edge tools.** Board International lacks much prepackaged BPS functionality but compensates with an intriguing rapid application development toolkit. The solution is delivered primarily through channel partners that build out solutions for clients. The Board 7.1 solution features a drag-and-drop toolkit that is optimized for rapid deployment of BPS applications. Board International provides advanced graphics and usability features using the latest Microsoft user experience technology. Board has a packaged financial consolidations application currently and is planning to release more prepackaged BPS functionality in subsequent versions.
- **Longview Solutions is ramping up with its next-generation release.** Longview 7 replaces the successful, but aging, Khalix V3 solution. Longview 7 inherits much of the functional BPS capabilities and technical robustness of the older release, while improving on it with new configuration tooling, service-oriented architecture (SOA), and Web user interface features. The Longview 7 release, announced as generally available in October 2009, was still evolving in some areas at the time of the study, but represents a major step forward for the vendor.

## SUPPLEMENTAL MATERIAL

### Online Resource

The online version of Figure 3 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 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 additional details of vendor qualifications.
- **Product demos.** We asked vendors to conduct demonstrations of their product's functionality. We used findings from these product demos to validate details of each vendor's product capabilities as well as understand future product road maps.
- **Customer reference surveys.** To validate product and vendor qualifications, Forrester also conducted online reference surveys with several 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> IFRS refers to International Financial Reporting Standards (<http://www.iasb.org>). IFRS is becoming a priority for both US and Canadian companies, as they convert local GAAP (generally accepted accounting principles) reporting standards to the international standards. XBRL refers to eXtensible Business Reporting Language (<http://www.xbrl.org/>), an open data standard for financial reporting that is being adopted by the US Securities and Exchange Commission (SEC) and other regulators throughout the world as a requirement for data submission.
- <sup>2</sup> BPS is a software category that accounts for approximately \$2 billion in spending, including licenses, subscriptions, and maintenance. For further discussion on the sizing and trajectory of the market, see the January 20, 2009, "[Business Performance Solutions: Clash Of The Titans](#)" report.

# FORRESTER®

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## Headquarters

Forrester Research, Inc.  
400 Technology Square  
Cambridge, MA 02139 USA  
Tel: +1 617.613.6000  
Fax: +1 617.613.5000  
Email: [forrester@forrester.com](mailto:forrester@forrester.com)  
Nasdaq symbol: FORR  
[www.forrester.com](http://www.forrester.com)

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