

September 14, 2006

# The Forrester Wave™: Commerce Platforms, Q3 2006

by Tamara Mendelsohn

TECH CHOICES

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## The Forrester Wave™: Commerce Platforms, Q3 2006

ATG, Escalate Retail, And IBM Lead For B2C Sites; Comergent And IBM Lead B2B

by **Tamara Mendelsohn**

with Bradford J. Holmes, Nikki Baird, and Brian Tesch

### EXECUTIVE SUMMARY

Forrester evaluated leading commerce platform vendors across 175 criteria and found that ATG, Escalate Retail, and IBM offer the most complete and sophisticated solutions for organizations selling directly to consumers. For channel management professionals selling to business customers, Forrester's lab-based evaluation reveals that small pure-play Comergent is joined by IBM in the Leaders category, as both offer the flexibility and focus required by B2B sellers. Microsoft, Oracle, and SAP are Strong Performers in both customer cohorts, all leaning heavily on complementary products to provide complete solutions.

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Forrester conducted lab-based product evaluations in Q2 2006 and interviewed eight vendor and companies: ATG, BroadVision, Comergent, Escalate Retail, IBM, Microsoft, Oracle, and SAP.

#### **Related Research Documents**

["Making Sense Of Hosted Commerce Platforms"](#)  
March 17, 2006, Market Overview

["Commerce Platforms: Build Or Buy?"](#)  
January 20, 2006, Trends

["The Forrester Wave™: Commerce Platforms, Q2 2005"](#)  
April 29, 2005, Tech Choices

## TARGET AUDIENCE

Channel and product management professional, chief information officer

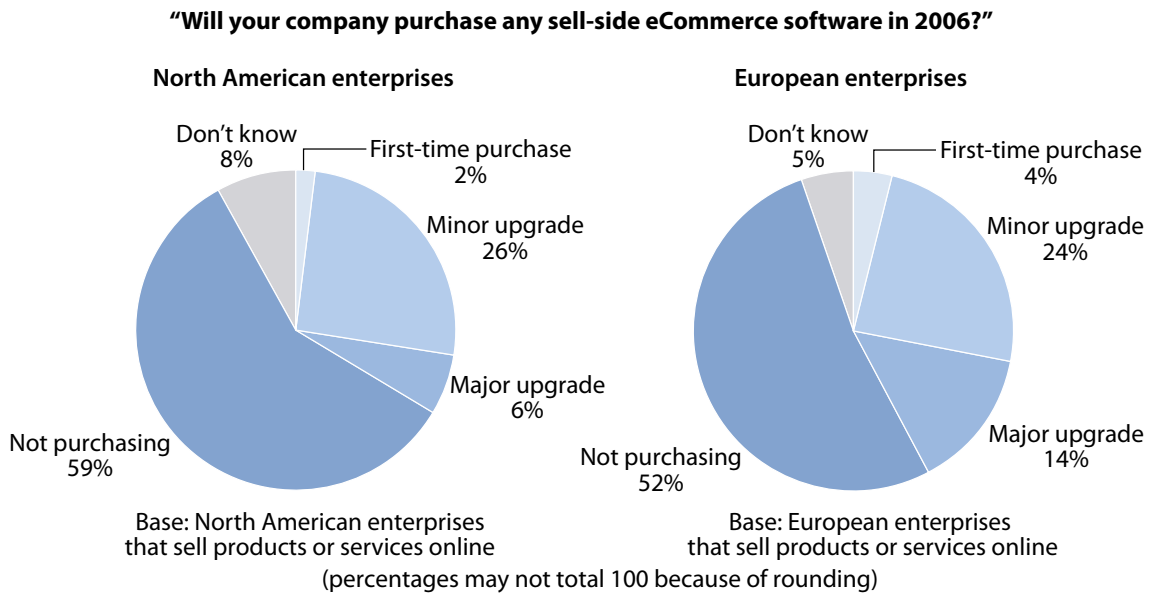
## eCOMMERCE EXECUTIVES CONTINUE INVESTMENT IN COMMERCE PLATFORMS

The renaissance in eCommerce investment that began in 2005 continues as companies across industries, such as Ann Taylor, NEC, OfficeMax, and Wynn Resorts, move off of outdated technology platforms or launch online channels for the first time. In fact, 34% of North American enterprises and 42% of European enterprises that sell products or services online told us that they will be buying or upgrading commerce platform technology this year, underscoring that we are still in the midst of a replatforming cycle (see Figure 1). Much of this investment is driven by eCommerce executives with expanded budgets, the result of strong online channel performance, and, in the case of manufacturing organizations like Toro, the need to offer a channel to connect and sell directly to consumers.

### eCommerce Executives Face A Mature Market

eCommerce or IT executives looking to choose an enterprise commerce platform face a limited selection. While midmarket commerce platforms are still plentiful, the booming but fragmented enterprise commerce platform market became a mature, consolidated one as the post-2000 eCommerce-technology-spending drought weeded out weaker contenders.<sup>1</sup> In Europe, a few independent vendors, such as Intershop Communications, persist, but in North America firms have limited choices among three categories of vendors:

- **Application specialists.** In the late '90s, eCommerce vendors flooded the market, but the post-bubble downturn weeded out most of the vendors that didn't have strong offerings or viable strategies. The result? Highly refined products from specialized vendors with a clear strategy, such as ATG and Comergent.
- **Infrastructure vendors.** IBM and Microsoft hold down the fort in this category and rely on their underlying platforms to manage data and provide a complete view of the customer. They go to market touting platform flexibility, integration capabilities, performance and scalability, and sophisticated developer tools.
- **Enterprise application vendors.** The application vendors, including Oracle, SAP, and now Escalate Retail, go to market with an integrated suite approach and position their commerce platforms as an extension of their back-end applications. They feature a unified set of tools integrated with and enhanced by their ERP and CRM products.

**Figure 1** The Commerce Platform Upgrade Cycle Continues In 2006

Source: Business Technographics® November 2005 North American And European Enterprise Software And Services Survey

39919

Source: Forrester Research, Inc.

## COMMERCE PLATFORMS EVALUATION OVERVIEW

To assess the state of the commerce platform market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top commerce platform vendors.

### Buyers Focus On Business User Tools

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria (see Figure 2). We evaluated vendors against approximately 175 criteria, which we grouped into three high-level buckets:

- **Current offering.** Forrester’s criteria to assess the strength of companies’ current offerings are weighted heavily toward business user tools — a requirement that eCommerce executives have told Forrester is critical as marketing and merchandising take the front seat in online selling strategies. We evaluated each offering against eight groups of criteria: product architecture, administration and management, catalog and content management, campaigns and marketing, customer management, order management, B2B capabilities, and reporting and analytics.

**Figure 2** Evaluation Criteria

CURRENT OFFERING	
Product architecture	How well is the product built for delivering high performance and scalability across channels and globally?
Administration and management	How robust are the product's administration and management features?
Catalog and content management	How extensive are the product's tools for catalog and content management?
Campaigns and marketing	How extensive are the product's sales and marketing features?
Customer management	How strong are the tools to manage customer information and self-service capabilities?
Order management	How well does the product facilitate order management?
B2B capabilities	How well does the product support B2B environments?
Reporting and analytics	How sophisticated is the product's set of tools for reporting on and analyzing buyer interactions and the efficacy of marketing campaigns?
STRATEGY	
Product strategy	How strong is the vendor's product strategy?
Financial resources to support strategy	Is the vendor profitable, and what is the vendor's cash flow? Does the company have sufficient revenues, profits, and cash flow to support its strategies?
Cost	What is the cost of this product?
MARKET PRESENCE	
Installed base	How large is the vendor's installed base of customers for this product and for all products?
Revenue	What is the vendor's total revenue over the past four quarters?
Revenue growth	What is the vendor's year-over-year revenue growth over the past four quarters?
Employees	How many engineers does the vendor have dedicated to this product? How big is the vendor's sales presence?
Partnerships	How strongly do partners support this product?

Source: Forrester Research, Inc.

- **Strategy.** We compared the strategies of each company with the needs of eCommerce executives, industry trends, and Forrester's forward-looking vision of the eCommerce market to assess how well each vendor is positioned for future success. We looked at product strategy, financial resources to support strategy, and cost.
- **Market presence.** We combined information about each vendor's installed base, recent sales momentum, revenues, employee count, and partnerships to determine current market presence. Many firms support online businesses on technology that has been left orphaned by vendor evaporation during the technology recession, so given a second chance, eCommerce and IT executives look for vendors with a strong and stable installed base, steady growth, and a network of partners and resellers.

### Forrester Evaluated Vendors According To Size And Scope Criteria

Forrester included seven vendors in the assessment: ATG, Comergent, Escalate Retail, IBM, Microsoft, Oracle, and SAP. Each of these vendors has:

- **A combined B2C and B2B focus.** As more firms look to support both B2C and B2B sites on one platform, Forrester chose to evaluate products that provide features to support both environments and that have an installed base of both B2C and B2B customers.
- **A traditional licensed offering.** To provide a fair and accurate comparison, we evaluated only traditional licensed applications in this study. Firms that choose a hosted offering for their eCommerce sites often have different requirements, such as a low-cost software-as-a-service architecture, and the hosted offerings themselves have differentiators unique to their market, such as online and search engine marketing expertise, flexibility of site layout for multitenant offerings, and service-level agreements.
- **A profitable business with revenues of more than \$50 million.** To ensure that the vendors we evaluated will remain viable in this relatively mature market, Forrester limited its analysis to companies that have substantial revenues to sustain them — more than \$50 million.

Forrester did not include BroadVision in this year's Forrester Wave evaluation because of the vendor's current financial difficulties. However, its revenue for the first quarter of 2006 was \$12.6 million, and its commerce platform technology continues to be a BroadVision strength. With its latest release of 8.0, the company delivered a long-awaited Java-based platform.

Forrester's evaluation methodology depends in part on input from the vendors themselves, including lab evaluations, questionnaires, and customer references. In this evaluation, SAP did not provide a full set of inputs for the second year in a row, choosing not to bring its product into our lab for evaluation. Our evaluation of SAP is based on our analysis from a partial set of inputs, including product briefings, a demonstration, and interviews with reference customers.

## B2B AND B2C eCOMMERCE EXECUTIVES ARE FACED WITH DISTINCT CHOICES

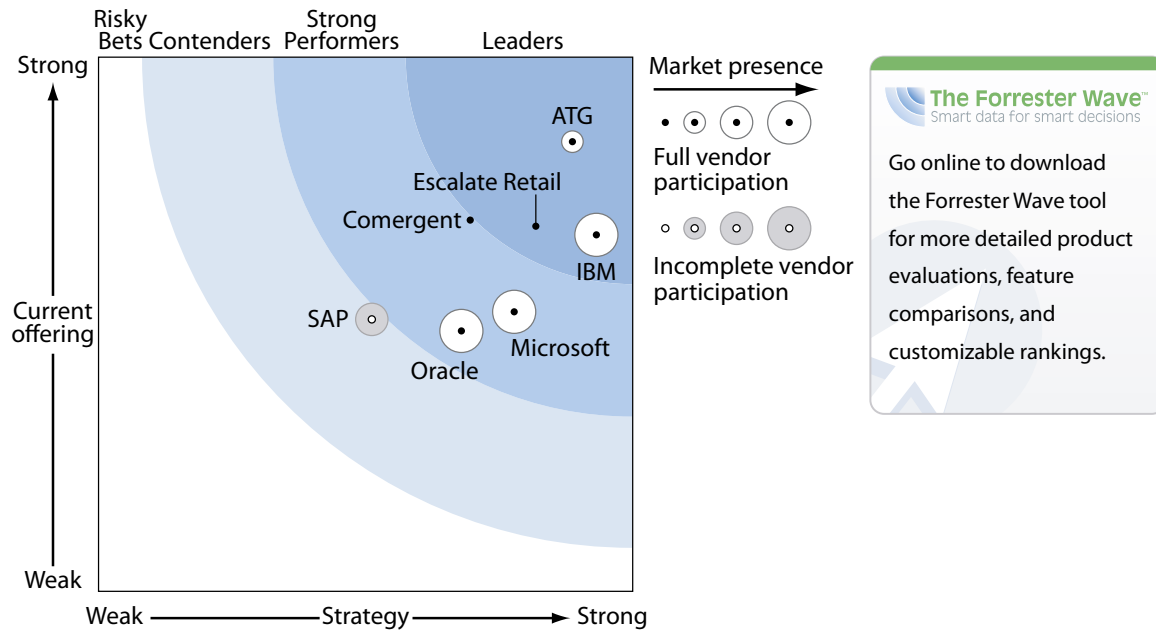
Since our first evaluation in the mid-1990s, commerce platforms have evolved to be much more than a platform and tool set for building online storefronts. Today, they are much closer to an application and include packaged components and business logic far beyond the shopping cart; they can now also natively handle complex catalog structures, merchandising, campaign management, and sophisticated selling scenarios to drive revenue and efficiency. The vendors tap into their respective core strengths to enhance their commerce platforms offerings; we uncovered a market in which (see Figure 3 and see Figure 4):

- **ATG, Escalate Retail, and IBM set the standard for B2C customers.** While each of these vendors offers unique strengths, they have all carefully tailored their products to meet the requirements of B2C sellers. ATG continues to feature best-in-class personalization and has augmented its core product with sophisticated search merchandising and analytics, making it a good fit for firms looking to run a sophisticated and optimized online business. Under the covers, Escalate Retail's commerce platform product is Blue Martini, formerly a commerce platform pure play with a highly specialized offering. Escalate focuses on the retail industry, targeting medium-size and large multichannel retailers and touting a product suite that spans all channels, but the vendor still has a lot of work to do before it can deliver on this promise. Forrester scored IBM in the Leaders category again this year, as the company successfully executed on the strategy and vision for the product it shared the last time we reviewed it. IBM WebSphere Commerce now offers a fully integrated natural language search engine as well as native integration to multichannel modules like gift registry and contact center, making it a good fit for large multichannel retailers that buy into IBM's framework for all channels.
- **Comergent and IBM lead the pack for B2B sellers.** Comergent, new to this year's evaluation, won a place in the Leaders category for B2B customers. Offering a highly modular approach, the vendor's architecture is flexible enough to tackle the most complex B2B scenarios. IBM is the only vendor to land in the Leaders category for both B2C and B2B sites; it has a strong architecture and support for B2B contract and order management. The product's Extended Site functionality also makes it a good fit for firms that sell products under several brands or support multiple tiers of partners, offering the flexibility of separate sites and delegated management but with the control to manage and reuse data assets across sites.
- **Microsoft, Oracle, and SAP rely on cousin products to boost commerce platform strength.** Each of these vendors offers a solid commerce platform, all of which are greatly enhanced through integration with the vendor's other product offerings. Oracle's iStore is reliant on the ERP and CRM modules of its eBusiness Suite to provide more sophisticated marketing promotions and discounts and support advanced shipping features. SAP has followed a similar strategy, building its commerce platform into MySAP CRM and relying on CRM for catalog management and marketing capabilities. Microsoft Commerce Server, while not reliant on CRM

or ERP, is enhanced through deployment with Microsoft BizTalk Integration Server to provide more robust integration capabilities. It also relies on BizTalk for most B2B functionality, such as partner management, and order management features like punch-out, recurring and scheduled orders, invoice generation, and payment tracking.

This evaluation of the commerce platforms market is intended to be a starting point only. Readers are encouraged 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™: Commerce Platforms For B2C Sites, Q3 '06



Source: Forrester Research, Inc.



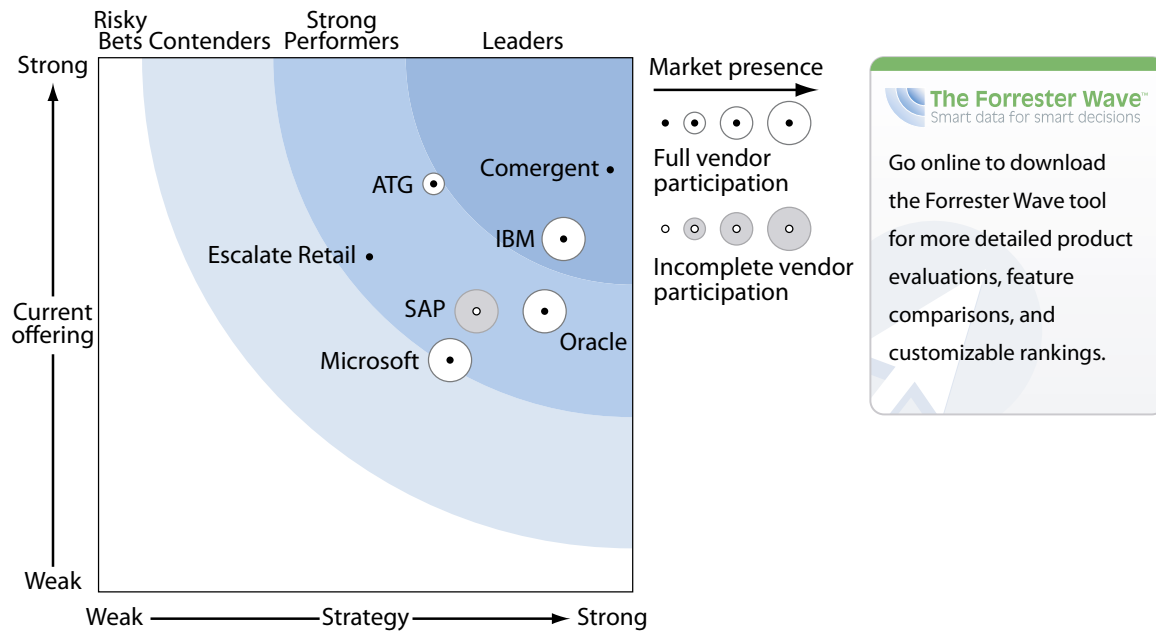
**Figure 3** Forrester Wave™: Commerce Platforms For B2C Sites, Q3 '06 (Cont.)

	Forrester's Weighting	ATG	Comerгент	Escalate Retail	IBM	Microsoft	Oracle
<b>CURRENT OFFERING</b>	50%	4.19	3.50	3.42	3.31	2.59	2.44
Product architecture	5%	3.98	4.15	3.71	4.41	3.54	3.36
Administration and management	15%	4.80	3.80	4.20	2.40	2.50	1.00
Catalog and content management	15%	4.23	3.39	3.29	2.89	2.75	1.46
Campaigns and marketing	20%	3.93	2.77	3.50	4.47	3.08	2.98
Customer management	15%	5.00	3.40	2.40	3.00	2.60	2.80
Order management	15%	3.40	4.57	3.49	3.48	1.82	2.67
B2B capabilities	0%	2.83	4.35	2.18	3.61	1.11	3.28
Reporting and analytics	15%	3.95	3.08	3.53	2.85	2.33	3.23
<b>STRATEGY</b>	50%	4.44	3.52	4.08	4.64	3.88	3.44
Product strategy	80%	4.30	3.40	4.10	4.55	3.60	3.05
Financial resources to support strategy	20%	5.00	4.00	4.00	5.00	5.00	5.00
Cost	0%	3.80	2.30	2.70	2.40	4.50	1.50
<b>MARKET PRESENCE</b>	0%	2.83	1.74	1.55	4.09	4.04	4.36
Installed base	25%	2.65	2.05	0.95	4.00	4.60	3.95
Revenue	25%	3.00	1.00	1.00	5.00	5.00	5.00
Revenue growth	10%	3.00	5.00	3.00	0.00	1.00	3.00
Employees	20%	2.80	1.40	1.60	4.70	3.20	4.10
Partnerships	20%	2.80	1.00	2.20	4.50	4.5	5.00

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

Source: Forrester Research, Inc.

**Figure 4** Forrester Wave™: Commerce Platforms For B2B Sites, Q3 '06



Source: Forrester Research, Inc.

**Figure 4** Forrester Wave™: Commerce Platforms For B2B Sites, Q3 '06 (Cont.)

	Forrester's Weighting	ATG	Comergent	Escalate Retail	IBM	Microsoft	Oracle
<b>CURRENT OFFERING</b>	50%	3.81	3.92	3.14	3.29	2.18	2.60
Product architecture	5%	3.94	4.31	3.62	4.36	3.54	3.45
Administration and management	15%	4.80	4.10	4.20	2.40	2.50	1.45
Catalog and content management	15%	4.23	3.39	3.29	2.89	2.75	1.46
Campaigns and marketing	10%	3.62	3.05	3.52	4.23	2.82	3.11
Customer management	10%	5.00	3.40	2.40	3.00	2.60	2.80
Order management	15%	3.40	4.57	3.49	3.48	1.82	2.67
B2B capabilities	25%	2.83	4.35	2.18	3.61	1.11	3.28
Reporting and analytics	5%	3.73	3.20	3.58	2.65	2.55	3.55
<b>STRATEGY</b>	50%	3.16	4.80	2.52	4.36	3.32	4.16
Product strategy	80%	2.70	5.00	2.15	4.20	2.90	3.95
Financial resources to support strategy	20%	5.00	4.00	4.00	5.00	5.00	5.00
Cost	0%	3.80	2.30	2.70	2.40	4.50	1.50
<b>MARKET PRESENCE</b>	0%	2.83	1.74	1.55	4.09	4.04	4.36
Installed base	25%	2.65	2.05	0.95	4.00	4.60	3.95
Revenue	25%	3.00	1.00	1.00	5.00	5.00	5.00
Revenue growth	10%	3.00	5.00	3.00	0.00	1.00	3.00
Employees	20%	2.80	1.40	1.60	4.70	3.20	4.10
Partnerships	20%	2.80	1.00	2.20	4.50	4.50	5.00

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

Source: Forrester Research, Inc.

## VENDOR PROFILES

- ATG.** ATG has capitalized on a revival of technology investment in commerce platforms, bringing on 65 new customers over the past year and growing its revenues to \$90 million. With more than a decade of experience in this market, ATG delivers a highly specialized product with strong marketing and personalization features. It has spent the past year enhancing its core platform with extended capabilities like natural language search, business intelligence, Web analytics, customer service, and chat as well as streamlining its business user tools and interfaces. The platform is well-tuned for complex B2C sites but isn't a particularly good fit for complex B2B sellers.<sup>2</sup>
- Comergent.** Comergent is a small, private independent software vendor with 150 customers and a strong growth trajectory. Its best-of-breed B2B commerce platform, combined with its increased B2C focus, earned the company a place in this year's Forrester Wave evaluation of

commerce platforms. The company took Forrester's top spot in current offering for B2B sites with a flexible platform that supports sophisticated B2B relationships and complex integrations, making Comergent a good fit for B2B organizations dedicated to growing an online business.<sup>3</sup>

- **Escalate Retail.** Escalate Retail is the rebranded product of four formerly distinct companies: Blue Martini, Ecometry, GERS, and ADS Retail. These firms were taken under management by Golden Gate Capital, a private equity firm, to create a unified retail platform targeted at the midmarket. The product supports eCommerce, customer intelligence, point of sale, multichannel fulfillment, and planning and merchandising. The commerce platform component, the former Blue Martini platform, continues to be a leader for B2C eCommerce sites, with strong support for personalization and multichannel marketing making, but it lacks any focus for industries other than retail.<sup>4</sup>
- **IBM.** IBM, the largest vendor we evaluated, continues to foster aggressive growth in its WebSphere Commerce product suite, adding modules like a rich call center application, a natural language search engine, and a multichannel gift registry to support multichannel sellers. WebSphere Commerce, built on IBM's WebSphere Application Server, leverages the flexibility and scalability of the underlying application server to support both B2C and B2B deployments. Overall, the product has strong marketing and campaign management features but lacks content management and sophisticated reporting and analytics.<sup>5</sup>
- **Microsoft.** The long-awaited release of Commerce Server 2007 keeps Microsoft on the commerce platform map with enhancements that include increased catalog flexibility, enhanced developer tools, and a replacement of the old BizDesk administration user interface with more agile .NET smart clients that run on top of Web services. The platform lacks much of the packaged marketing and personalization capabilities of its competitors, and Microsoft has chosen to rely on its systems integrator partners to create and package platform enhancements. Commerce Server functionality is bolstered through integration with BizTalk Server 2006, the upcoming release of SharePoint Portal Server, and SQL Server 2005, making the product a good fit for firms that are investing in these Microsoft products and that have strong .NET developer resources.<sup>6</sup>
- **Oracle.** Oracle is the only vendor in Forrester's commerce platforms evaluation this year that has not issued a new product version since Forrester's Q2 2005 evaluation. Oracle iStore 11i.10 is a solid eCommerce extension of Oracle's ERP and CRM products, but the rest of the products in the market have raised the bar in functionality, leaving this version of iStore behind the pack. Oracle is gearing up for the release of R12 — due out later this year — which includes enhancements in the administration user interface, streamlined partner ordering, online account creation, a new Web analytics and reporting solution, and a telco industry offering. Oracle iStore continues to be a good fit for B2B organizations and basic B2C sites that are implemented in a stack with Oracle ERP and CRM.<sup>7</sup>

- **SAP.** SAP's commerce platform is tightly coupled with its CRM solution, MySAP CRM, and relies on CRM for catalog, pricing, and campaign management. Alternatively, the product can be deployed with SAP's ERP system, mySAP ERP, but this configuration doesn't support marketing capabilities and is a better fit for straightforward B2B deployments. The catalog functionality still has some limitations in flexibility, as it is so tightly coupled with CRM, but this tight integration also supports more sophisticated marketing and campaign management capabilities for eCommerce.

## SUPPLEMENTAL MATERIAL

### Online Resources

The online versions of Figure 3 and Figure 4 are Excel-based vendor comparison tools that provide detailed product evaluations and customizable rankings.

### Data Sources Used In This Forrester Wave

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

- **Hands-on lab evaluations.** Vendors spent one day with a team of analysts who performed a hands-on evaluation of the product using a scenario-based testing methodology. We evaluated each product using the same scenarios, creating a level playing field by evaluating every product on the same criteria.
- **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 readers are encouraged 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> Interest in hosted commerce platforms continues to grow, as brand manufacturers without eCommerce expertise go direct, retailers look to explore international markets with less risk, and small and medium-size online sellers push vendors to offer more competitive and sophisticated solutions. The result? A cacophony of hosted commerce platform vendors touting the latest and greatest features, industry expertise, and lower price points — all inevitably on-demand. It's hip to be on-demand in a day when time-to-market equals time-to-revenue, but as vendors cash in on the new catch phrase, they create an increasingly complex landscape of solutions for retailers to navigate. See the March 17, 2006, Market Overview "[Making Sense Of Hosted Commerce Platforms.](#)"
- <sup>2</sup> View the scorecard summary for more detailed analysis on how ATG fared in this evaluation. See the September 14, 2006, Tech Choices "[ATG Ups The Ante For B2C Commerce Platforms.](#)"
- <sup>3</sup> View the scorecard summary for more detailed analysis on how Comergent fared in this evaluation. See the September 14, 2006, Tech Choices "[Comergent Leads In B2B Commerce Platforms.](#)"
- <sup>4</sup> View the scorecard summary for more detailed analysis on how Escalate Retail fared in this evaluation. See the September 14, 2006, Tech Choices "[Escalate Retail Focuses Its Commerce Platform Strategy On Midmarket Retail.](#)"
- <sup>5</sup> View the scorecard summary for more detailed analysis on how IBM fared in this evaluation. See the September 14, 2006, Tech Choices "[IBM Brings A Strong Multichannel Focus To Its Commerce Platform.](#)"
- <sup>6</sup> View the scorecard summary for more detailed analysis on how Microsoft fared in this evaluation. See the September 14, 2006, Tech Choices "[Microsoft Keeps Pace With Long-Awaited Commerce Platform Release.](#)"
- <sup>7</sup> View the scorecard summary for more detailed analysis on how Oracle fared in this evaluation. See the September 14, 2006, Tech Choices "[Oracle Relies On ERP And CRM To Enhance Its Commerce Platform Offering.](#)"

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Helping Business Thrive On Technology Change

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