

# The Digital Business Imperative

by Ted Schadler and Nigel Fenwick  
February 15, 2017

## Why Read This Report

Customers' power in the marketplace continues to ramp up, so eBusiness leaders still need to transform digital customer experiences, including marketing, sales, and channels. The ability to align products, operations, and business models to what we call a "customer-obsessed operating model" will determine firms' ultimate success. To digitally transform both experiences and operations, eBusiness professionals will apply technology to these facets of the business, ensuring that they are customer-led and insights-driven.

This is an update of a previously published report. Forrester reviews and updates it periodically for continued relevance and accuracy; we revised this edition to factor in new data, examples, and ideas.

## Key Takeaways

### **Don't Build A Digital Strategy; Digitize Your Business Strategy**

Digital fundamentally changes your relationship with your customers. You can't address this change with a bolt-on digital strategy that adds an app here or a site there. To remain competitive, you must re-engineer how your business creates value for your customers in the digital age.

### **Use Digital To Help Customers Get To The Outcomes That They Desire**

Re-envision your business not as a set of products and services but as part of the personal value ecosystems that your customers assemble according to their needs and desires. Learn to increase value by expanding your company's role in your customers' personal value ecosystems.

### **Digital Operational Excellence Increases Business Agility**

Digital business isn't just about customer experience — it's also a way to drive operational agility. Digital operations can increase speed-to-market, make employees more productive, promote leaner processes, and maximize asset utilization.

# The Digital Business Imperative

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February 15, 2017

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## Notes & Resources

This analysis is based on ongoing conversations and interviews with digital business leaders. It also uses data from the Forrester/Odgers Berndtson Q3 2015 Global Digital Business Online Survey.

## Related Research Documents

- [The CIO Mandate: Engaging Customers With Business Technology](#)
- [The Customer Experience Ecosystem Redefined](#)
- [Winning In The Age Of The Customer](#)

## Digital Transforms The Game Of Business

As an eBusiness leader, do you get the feeling that you're no longer playing the same game that you once were? It's not you; the world has changed. The things that used to set companies apart — such as economies of scale, distribution strength, and brand — are far less potent than they used to be. Why? Because digital technology has fundamentally changed two things: the dynamics of the markets in which you operate and the speed that you need to remain competitive.

### Digital Has Changed Your Markets

Your customers aren't who they used to be — they haven't been for quite some time now. Digital touchpoints permeate every aspect of your customers' lives — how they watch TV on Netflix, how they research new products on their smartphone, how they check their balance on PayPal, or how they review their stay on Airbnb. Business buyers expect automated service, tap communities for insights, and want services with apps attached; they're even more digital than consumers are. Digital has transformed the market context for every business, and the pace of change is accelerating. Now:

- › **Your customers are digital.** The number of global smartphone subscribers will reach 5.9 billion by 2021, with more than half of the world's population owning one in 2015, compared with 33% in 2013.<sup>1</sup> Facebook and YouTube now both boast more than 1 billion users worldwide, and Apple and WhatsApp aren't far behind.<sup>2</sup> Digital technology powerfully changes how customers experience products and what they value. We are entering an era of hyperadoption and hyperabandonment in which consumers flock to, and flock away from, new digital experiences at unprecedented rates.
- › **Your channels are digital.** Digital has transformed the ways in which customers discover, buy, and engage with products and services.<sup>3</sup> By 2018, we expect web-affected retail to account for 52% of all US retail sales, and 14% of all sales will be online.<sup>4</sup> Already 84% of US banking customers have used online banking in the past three months, and 43% have carried out these same activities on a mobile phone.<sup>5</sup> More than half of US B2B buyers prefer to research business purchases online rather than engage with salespeople, and three-quarters say that buying online is more convenient than through other channels.<sup>6</sup> With this rapid rate of adoption of digital touchpoints for shopping, banking, travel, and business services, digital is no longer an incremental revenue stream — it's fast becoming your primary route to market.
- › **Your competitors are digital.** Digital disruptors challenge your business model as they engage your customers in new ways. They can quickly win market share and grow from startups to critical players in a few years. Only three of the top 10 firms on the Nasdaq in 1999 were still in the top 10 this year.<sup>7</sup> In 2015, PayPal processed \$282 billion in payments.<sup>8</sup> Netflix now has 65 million subscribers, which is almost three times as many as Comcast's video customers.<sup>9</sup> General Electric (GE) believes that digital business will add \$15.3 trillion to global gross domestic product by 2030.<sup>10</sup> Unless your firm can learn to think and operate like a disruptor, you won't see the potential for disruption until it hits your business. Your choice is to evolve to become a disruptor yourself or watch your market share tumble.<sup>11</sup>

**The Digital Business Imperative****Digital Has Changed The Way That You Operate**

Digital has transformed more than your channels and customers. It also disrupts you from within, changing the way that you do business. Digital not only accelerates the pace of change but also brings new opportunities for firms that can embrace the technology fast enough. It speeds time-to-market, reduces costs, and unlocks new revenue streams. There's a reason why manufacturers ABB, Schneider Electric, and Siemens spent a combined €8 billion on acquiring software assets to help clients design, manage, and optimize complex industrial operations like power grids more effectively. To keep pace, recognize that:

- › **Your products are digital.** Firms that digitally enhance physical products open doors to new experiences and revenue streams. Using real-time data from its jet engines, Rolls-Royce leases hours of propulsion to its airline customers. This reduces the cost to the airline and the impact of out-of-service planes on travelers.<sup>12</sup> DriveNow's mobile app gives almost half a million customers access to thousands of vehicles across nine cities, changing the way that they think about and pay for local transportation.<sup>13</sup> Increasingly sophisticated location- and context-aware apps and sensors are permeating the physical world, making digital services inseparable from traditional products and services.<sup>14</sup>
- › **Your insights are digital.** Digital technology brings the opportunity to generate deeper insight than ever before. With mobile location data, social activity, sensor data from products, and even clinical data from telemedicine devices, firms face an explosion of data to exploit. For example, New England Biolabs augments the sales of molecular biology products with a digital freezer that tracks which researchers use which genetic materials. By analyzing how individual researchers use its products, it can personalize its service to each research scientist.<sup>15</sup>
- › **Your employees are digital.** Employees' experiences as consumers shape their expectations in the workplace. They see access to mobile and social technology as critical to efficiency, changing how they work.<sup>16</sup> Firms like American Airlines and Burberry empower employees with CRM and sales apps on mobile devices to help them serve customers in their moments of need. When firms don't provide the right tools, empowered employees find their own tools, working smarter with tools off of the corporate radar like Dropbox and Slack. In fact, 44% of information workers globally who use a smartphone or tablet for work at least weekly have personally paid for work-related apps.<sup>17</sup>
- › **Your business operations are digital.** Digital technologies permeate your business operations. American Apparel achieves close to 100% stock accuracy across its stores with RFID technology.<sup>18</sup> The Alliance Integrated Manufacturing System (AIMS) partnership leverages factory automation to allow Nissan and Renault to customize 100% of their vehicles to buyers' specifications.<sup>19</sup> Even intelligent bearings contribute to productivity and reliability, allowing for more-compact equipment.<sup>20</sup>

## The Threat Is Strategic, But The Response Is Tactical

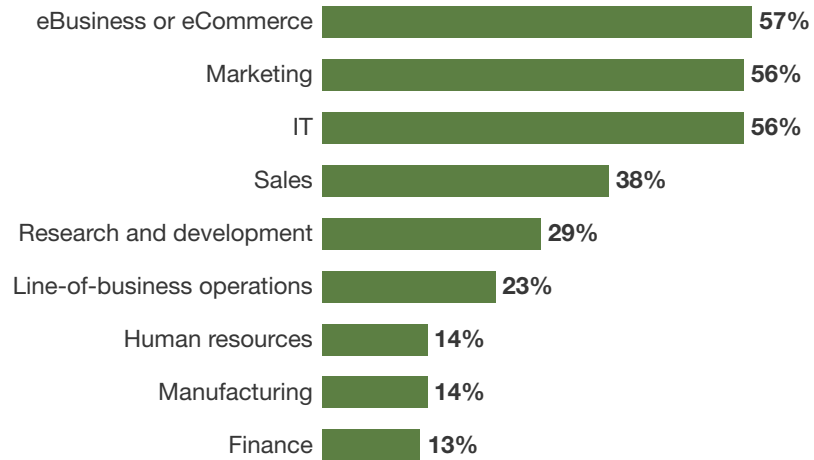
Responding to the opportunities and threats of digital is challenging, especially alongside the need to defend against losses and grow existing profits. In our latest survey of business executives, we found that they recognize that digital is a pervasive threat, but they have little confidence in their own senior management's ability to set an effective course (see Figure 1). In fact, 31% of executives believe that digital technologies are a major driver of business strategy. We found that:<sup>21</sup>

- › **Some 89% of execs believe that digital will disrupt their business in the next year.** One in four companies report that they have a full digital strategy in place, almost half have a limited strategy in place, and 7% are developing a digital strategy. Despite that, digital has already ridden roughshod over some industries, like media and entertainment, leaving obvious casualties like Blockbuster and Borders in its wake. But even in seemingly immune sectors, like industrial products, a third of executives believe that digital disruption will have a significant impact on their industry in the next 12 months (see Figure 2).
- › **They lack the insight to create a coherent vision and the skills to deliver it.** Fewer than a third of executives believe that their approach is correct, and even worse, just 21% believe that the right people are setting the strategy in the first place. Even if that strategy is the right one, only 16% of executives believe that their firm has the skills and competencies to execute on it.
- › **Their current operating model is holding them back.** Employees cite organizational inertia and functional barriers as the primary obstacles to delivering on their digital strategies. Two-thirds of employees believe that functional departments are too fixed in their ways, while 68% of business-unit leaders believe that the functional teams in their companies act as barriers to effective coordination.<sup>22</sup> The organizational structures, processes, and ways of working that have been so successful in the past are now your firm's greatest enemies in its race to embrace digital technology.

**FIGURE 1** Digital Disruption Will Have An Impact On Every Area Of Your Business

**“What level of impact will digital have on the following functions in the next 24 months?”**

(Responses of 8, 9, or 10 on a scale of 1 [no impact at all] to 10 [huge impact])

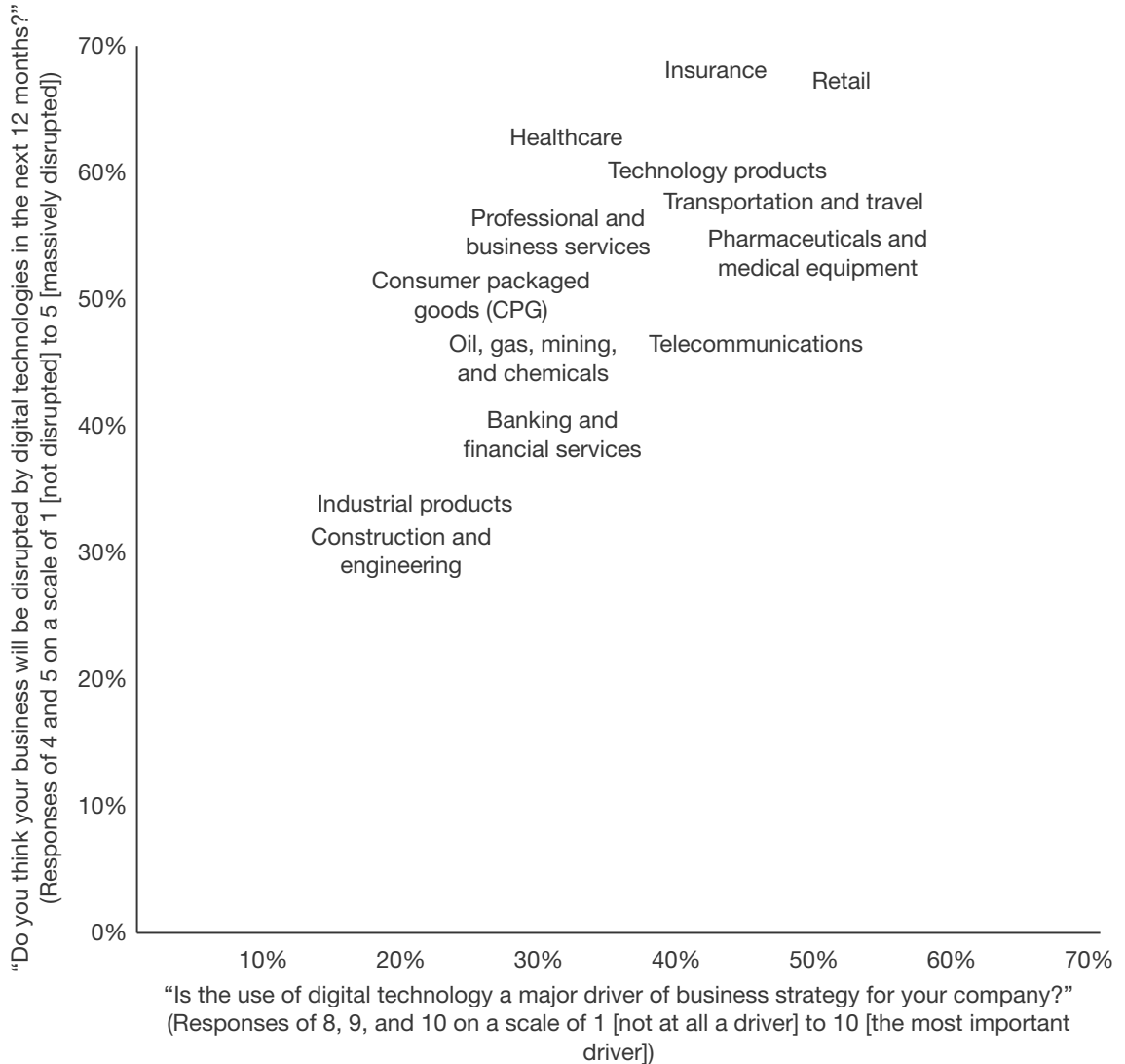


Base: 401 global executives in companies with 250 or more employees

Source: Forrester/Odgers Berndtson Q3 2015 Global Digital Business Online Survey

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**FIGURE 2** Digital Technology Drives Strategy And Disrupts Your Business



Base: 412 global executives in companies with 250 or more employees  
 (Respondents may be counted in multiple industry groups)  
 Source: Forrester/Odgers Berndtson Q3 2015 Global Digital Business Online Survey

**Don't Develop A Digital Strategy; Digitize Your Business Strategy**

Treating every new digital channel as another project generates organizational and technical chaos, intensifying the operational challenge for your firm's functional building blocks that are independently striving for internal efficiency and fighting for scarce resources. The digital-bolt-on approach can deliver tactical results, but the strategic reality is that your business needs a reset. You need to look at

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digital holistically. You need to transform your business by applying digital thinking across everything you do — how you win, serve, and retain customers; how you operate your internal processes; and how you source business services. In short, you must become a digital business (see Figure 3). We define digital businesses as the following:

*Digital businesses win, serve, and retain customers by continuously creating and exploiting digital assets to simultaneously deliver new sources of customer value and increase their operational agility.*

**FIGURE 3** Traditional Business Thinking Hinders Digital Transformation

|                               | Traditional business      | Digital business                         |
|-------------------------------|---------------------------|--|
| <b>Digital touchpoints</b>    | Bolt-on efforts           | Digitally enhanced products and services |
| <b>Operational excellence</b> | Functional efficiency     | Cross-functional agility                 |
| <b>Technology attitude</b>    | Safety and cost reduction | Speed and innovation                     |
| <b>Value proposition</b>      | Better products           | Enhanced personal value ecosystem        |

### Win By Delivering On Customer Outcomes, Not Just Products

Your success demands that you understand your customer's personal value ecosystem and become a part of it. Your company's ability to create value for its customers will depend on how easily you can digitally augment your core capabilities and realign them to deliver the outcomes that your customers really desire, rather than the products or services that you've traditionally sold.<sup>23</sup> Let your understanding of your customer's personal value ecosystem shape your future business strategy.<sup>24</sup> What exactly does this personal value ecosystem look like? Each example below represents elements of a personal value ecosystem.

- › **Young couples desire a safe, comfortable place in which to raise their family.** For some people, homeownership is an investment, but for many, it's a practical way to provide for their family. Banks and mortgage lenders traditionally see their customers as people needing a home loan. But that's not what customers desire. Their desire is to live in a safe, comfortable, and affordable home. Homeowners' personal value ecosystems include insurance, security, heating and cooling, elements of do-it-yourself, etc. By reshaping the company around the customer outcome, banks can use digital services to create new sources of value for their customers.



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Westpac used to sell mortgages. However, the bank understands that customers don't really want a mortgage — they want to own a home for their family. Westpac created its Home Finder app to help potential customers find the perfect home, helping Westpac deliver on its customers' underlying desire rather than just selling a mortgage. By looking at other companies in the homeowner's ecosystem of values, banks like Westpac can find new potential partners through which they can continue to create value beyond a mortgage note.

- › **Airlines want to keep their planes in the air and filled.** Airlines don't make money when their planes are on the ground. The personal value ecosystem for airline executives includes information and insights on operating efficiency, maintenance downtime, fuel consumption, loading levels, and many other factors that have an impact on the operating effectiveness of the airline. Airline executives also look at customer satisfaction because they have to create value for their customers to remain competitive. In the past, suppliers for airline operators sought to sell the best products at the most competitive prices. Many still do.

Rolls-Royce realized that its customers would value a new way to have their engines serviced and repaired quickly. Using digital sensors on the engines and round-the-clock monitoring of in-flight data, Rolls-Royce provided maintenance crews with valuable data that they needed to repair engines faster. Now, instead of just selling engines and parts, a major portion of Rolls-Royce's business comes from leasing engines and providing the maintenance for the airlines.

- › **Running enthusiasts have a desire to continuously improve performance.** Not everyone who buys running shoes is an athlete. But there's a significant core of runners for whom running is a passion. For these runners, the shoe is a means to improve their performance. Ten years ago, the personal value ecosystem for these runners included magazines like Runner's World, online running forums, and local running clubs.

By understanding the outcome that these runners wanted — to improve their performance — Nike used digital sensors to create a new source of value. The in-shoe Nike+ sensor was a digital innovation to help runners achieve their desired outcome. By adding iPod and mobile apps, Nike further extended the value that it could create for these runners, giving Nike a competitive advantage in a core sector of its target market. Nike continues to extend the value for customers by digitally enabling them to better achieve their desired outcomes.

- › **Grain farmers want to maximize crop yields.** The ecosystem of value for farmers contains everything that they need to help them maximize their yields. This includes traditional farm machinery as well as journals, online articles, and magazines on farm techniques, soil testing, pest news, fertilizer, pesticides, and seed inventories. Weather also looms large in a farmer's personal value ecosystem. In the past, equipment makers focused on developing efficient machinery and selling a better, more reliable product than their competitors. But today's farm machinery suppliers are evolving to become digital masters.

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By understanding its customers' desired outcome of increased crop yields, John Deere creates more value for its customers by offering digital services via a digital operations center. This interface allows farmers to monitor their fully digitized equipment and use GPS data feeds to track and position equipment for optimum output. John Deere aims to put itself at the epicenter of the farmer's value ecosystem.

### Your Strategy Must Embrace This New Digital Reality

Here's the challenge: Most eBusiness professionals serve only one small slice of their customers' overall ecosystem, inherently limiting their opportunity to meet their customers' end-to-end needs. An inside-out focus on delivering products and services fails to grasp that customers' desires are at the heart of their personal value ecosystems. eBusiness professionals who can pivot their approach to a fundamentally outside-in customer-outcome mindset create new opportunities for growth. To do this, you must re-envision your business not as a set of products and services but as part of the personal value ecosystem. This notion challenges the nature of your firm's relationships with your customers and suppliers, but it enables you to:

- › **Increase the value that you provide by digitally enhancing existing services.** By understanding your customers' underlying needs, you can reposition and extend how you add value for them, fueling new revenue streams. To begin, focus on how digital assets enhance the outcomes that your customers most value. For example, GE's industrial internet initiative includes sensor-enabling products, crowdsourcing design, and predictive analytics to help clients optimize asset utilization in large-scale operations like power generation or mining. GE added \$800 million of incremental revenue in 2013 through additional digital services.<sup>25</sup>
- › **Create new sources of value through digital partnerships.** By focusing on the customer's desired outcome, you can uncover opportunities to achieve those outcomes in new ways by partnering with other vendors that are already in the customer's personal value ecosystem. For example, in partnership with Nest, utility providers like Direct Energy offer "Rush Hour Rewards" to reduce demand for expensive peak energy. During periods of peak power demand, the Nest thermostat automatically load-balances energy demand, and in return, the utility delivers a rebate to the homeowner, enhancing the value ecosystem for businesses and consumers alike.<sup>26</sup>
- › **Use data and analytics to help customers achieve their desired outcomes.** Because your firm collects data from thousands or even millions of customers, you have access to a potential treasure trove of insight. Mining the data that you already collect and combining it with external data opens up new digital business opportunities. John Deere discovered this when it focused on helping farmers deliver the outcome that they desire most — high yields. By analyzing data from thousands of farms and integrating other climate data, John Deere now offers farmers a digital operations center for their farm to help them maximize the yield per acre.<sup>27</sup>

**The Digital Business Imperative****Design Customer Experiences To Deliver Customer Value**

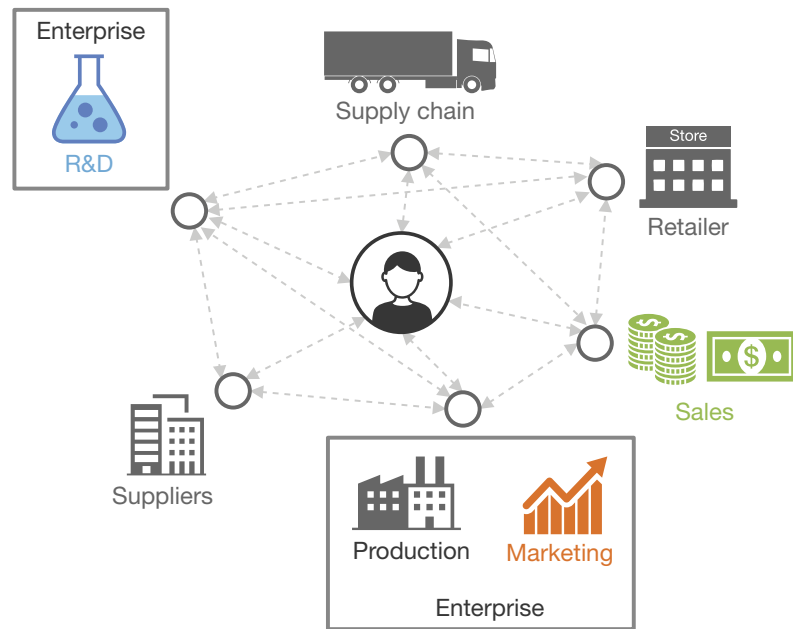
You cannot consistently deliver value against customers' rapidly evolving expectations by tweaking customer touchpoints. Instead, you must engineer a connected web of services and business capabilities to adapt to your customers' changing expectations. The set of interconnected business capabilities must be highly agile, embracing technologies like mobile, cloud, and APIs. These digitally enabled customer experience (CX) ecosystems are more flexible, scalable, and dynamic, and they focus obsessively on delivering customer value through digital assets. This means that:

- › **Modular businesses plug-and-play new capabilities.** To adapt to customers' expectations, businesses must continuously evolve their CX ecosystem. This requires business agility and demands more complex service orchestration across multiple partners. For example, Tesco built a dynamic network of drop-shipping suppliers using delivery management vendor MetaPack. As a result, Tesco rapidly added more than 50 new suppliers and a quarter million new items shipping directly to consumers under the Tesco brand without increasing costs significantly. A wider variety of merchandise in one place creates customer value by saving customers time.
- › **Linear value chains are collapsing.** Digital businesses don't operate in a traditional linear value chain (see Figure 4). Instead, they thrive by breaking down traditional barriers and connecting disparate entities — customers, suppliers, internal teams, or external partners — in a complex web (see Figure 5). These porous businesses embed partners and even customers deeply into their internal business processes. For example, Citroën crowdsourced design features of the C1 with an online design challenge, and Amazon Studios crowdsources content like storyboards and scripts for its new shows.<sup>28</sup> Building a dynamic CX ecosystem helps these firms rapidly create new sources of value for customers.
- › **New ecosystems challenge traditional operating-model assumptions and constraints.** Ecosystem-enabled operating models shift the boundaries of what used to be your business and make your firm porous. For example, online retailer Asos shifts responsibility for managing inventory to its marketplace partners, while Vodafone's M-Pesa payments service connects customers in a peer-to-peer network, challenging the need for traditional infrastructure like ATMs or even bank branches in developing communities.<sup>29</sup>

**FIGURE 4** Digital Erodes Traditional Static Value Chains



**FIGURE 5** Digital Business Shifts From Linear Value Chains To Digital Ecosystems

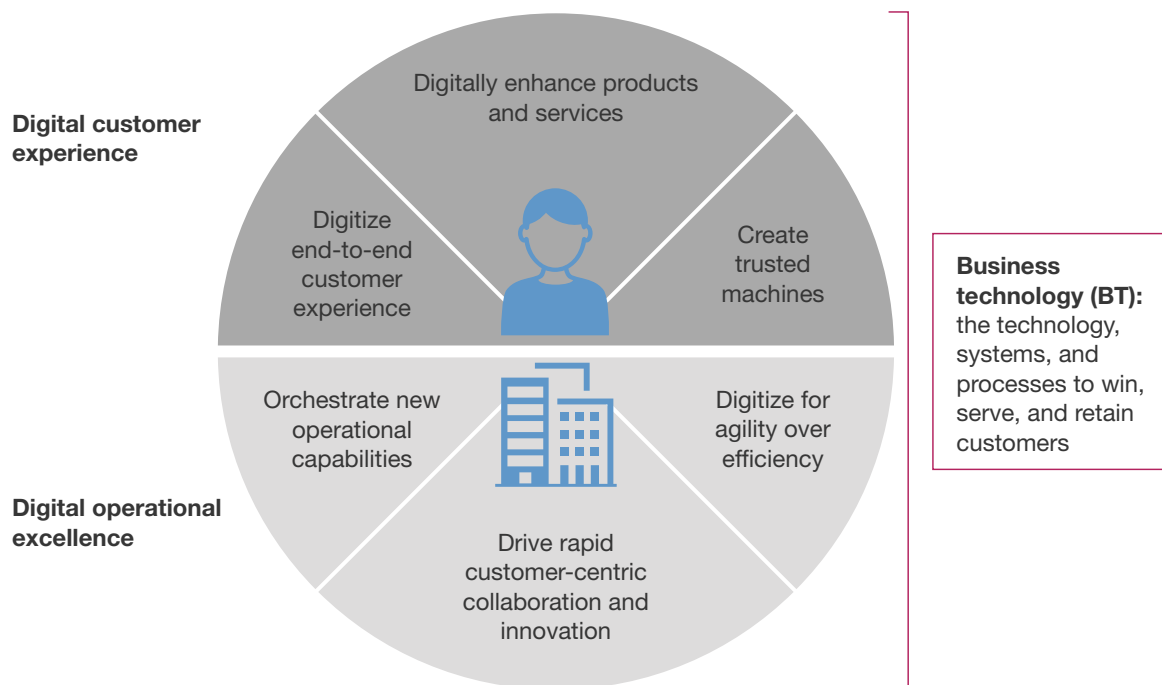


Ecosystem-driven businesses make dynamic connections between all players, transforming how they deliver value to their customers and transforming their operational capabilities.

## Master Digital Customer Experience And Operational Excellence

Many firms proudly point to their mobile app and proclaim, “Hey, we’re digital!” While they may be driving incremental revenue, all they have done is bolt on another touchpoint. Real digital businesses go much further, reshaping the way that they create value for their customers. Achieving this requires that firms approach digital business from the outside in, pursuing two dimensions of digital in parallel: digital customer experience (DCX) and digital operational excellence (DOX) (see Figure 6).

**FIGURE 6** Two Key Digital Dimensions: Customer Experience And Operational Excellence



### DCX Creates Lasting Value

Digital businesses understand that to win in the age of the customer, they must become a customer-obsessed company, not a product company.<sup>30</sup> Success means investing in constantly evolving customer experiences and understanding that technology has become fundamental to how your customers perceive value.<sup>31</sup> Your business operations are now part of a rapidly changing CX ecosystem. Don’t treat digital as a channel. Focus on delivering digitally enhanced value that is rooted in your core business strategy across all touchpoints and grown from your in-depth understanding of your customers’ underlying desires. This means that you must:

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- › **Digitize end-to-end customer experience.** Your digital touchpoints aren't standalone entities. Use CX techniques like journey mapping to understand your customers' behaviors, applying digital where it can best enhance value. For example, Emirates' ambitions went beyond simply finding and fixing problems. By equipping cabin crews with tablet devices, the company enabled a coordinated customer experience, with flight attendants noting customers' preferences that automatically show for customers on subsequent flights.<sup>32</sup> Engineering seamless, cross-functional, and proactive brand experiences that address customers' desires is critical to ongoing value creation.<sup>33</sup>
- › **Digitally enhance products and services.** Digital businesses reimagine products and services as digital experiences that augment the physical world. This effort demands disciplines like product management that many software houses take for granted. One energy management company's journey to digital business started by attaching QR codes to its industrial products and releasing a free mobile app that lets its customers scan the code to schedule maintenance. Previously the company estimated that it knew where approximately 15% of its equipment was installed. Now it has install data on more than 80% of its hardware, meaning that it can use that data to further enhance its customer value proposition.<sup>34</sup>
- › **Create trustworthy digital interactions.** Digital businesses create automated systems that deliver high-value, unique customer experiences for customers' immediate context. Customers learn to trust the recommendations of the system. This allows businesses to create valued customer experiences in real time without human intervention. Consumer electronics manufacturer Acer aims to reposition itself as a services company, rather than a product company selling laptops. Algorithms fine-tune Acer's customer experience, offering targeted advice, automated guidance, and product recommendations to customers. The results: Its Net Promoter Score increased 11 points, customers spent 29% longer on the website, and 45% of users rated the site experience 8 out of 10 or higher.<sup>35</sup>

### DOX Increases Business Agility

Digital business isn't just about customer experience — it's also a way to drive operational agility. Digital can increase speed-to-market, make employees more productive, and promote leaner processes and more effective asset use. When British Airways gave cabin crews iPads, the company expected the primary benefit to be an enhanced customer experience. But now staff members with iPads also track and highlight aircraft maintenance issues and prep ground crews to be ready with replacement parts. Like British Airways, you can embrace digital operational excellence. Here's how:

- › **Orchestrate new operational capabilities.** Germany's Fidor Bank extends its value to customers via streamlined partnerships and business processes.<sup>36</sup> By consuming services from a range of digital innovators, like payment provider Ripple, crowdfunding network Fundsters, and cryptocurrency platform Kraken, it can rapidly deliver innovative new services to its customers rather than spending time and money building software. These innovative new services helped Fidor grow its customer base by 24% in 2014.<sup>37</sup>

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- › **Drive rapid customer-centric collaboration and innovation.** Digital businesses connect customers and employees, forming dynamic cross-functional teams that aren't bound by traditional rules. Digital virtualization allows firms like Procter & Gamble (P&G) to test product packaging and shelf layouts with real customers in a virtual store before committing to costly manufacturing. Techniques like design thinking help formalize this collaboration.<sup>38</sup> Swisscom's human-centered design team helps internal project teams focus on the customer by providing specialist ethnographic researchers, psychologists, and designers from a center of excellence.<sup>39</sup>
- › **Digitize for agility over efficiency.** Digital business is highly agile and can rapidly respond to customers' changing needs by quickly spinning up new business capabilities. Embrace agility and connect your company and your suppliers together to rapidly and automatically respond to customers' changing expectations. Bosch, for example, is leading a consortium of German manufacturers to define a standard for dynamic automated manufacturing that it calls "Industry 4.0."<sup>40</sup> Bosch and its partners aim to create internet-connected self-optimizing factories that can automatically adjust to machine downtime or changes in supply of materials or order demand. This capability network not only creates a more agile supply chain all the way from raw materials providers to end consumers but also ultimately allows manufacturers to reflect on customers' individual requirements and cost-effectively manufacture even the most complex engineered products at batch sizes of one.

**Recommendations**

## No Matter Where You Start, Collaboration Is King

This initiative is nothing short of a reboot of your company's operating model. Changing how your business creates value for your customers may put your existing revenue streams at risk. It seems daunting. How do you get started? Many companies start small, focusing on reshaping one business unit or product line, which in turn helps with innovation and digital agility. Managing scope and continually experimenting to find the right answers are vital techniques.

Often that means learning by bolting digital experiments onto the existing business model. Audi experimented by creating its digital dealership model, Audi City, in London.<sup>41</sup> BMW Group and Sixt teamed up to create a new digitally powered collaboration with DriveNow. Nike is experimenting with digital-first products like NikeFuel, opening up its data with the Nike+ API to create an innovation ecosystem that third-party developers can plug into.<sup>42</sup> BBVA's innovation team sits at the heart of its digital transformation efforts.<sup>43</sup> But in the long run, bolt-on efforts will only take you halfway. To truly transform their business digitally, eBusiness professionals must help reshape the thinking across the business. Here's how you can do it:

- › **Establish a clear digital vision.** Digital business transformation is so fundamental to a firm's future success that the CEO must inspire employees to pursue a vision of the company as a digital business. However, many CEOs feel that digital is somewhat beyond their grasp. If that's the case



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in your firm, then as a digital leader, you must step up and collaborate with your CMO and CIO to jointly cocreate a digital vision that your CEO can sponsor. Flex your digital skills to take a digital leadership position in the organization — show how proven results from your eBusiness experience can scale to other parts of the business.<sup>44</sup>

- › **Establish a digital-first culture.** Collaboration, agility, and digital innovation are second nature to employees in digital businesses. Fuel the digital-first mindset in your firm by educating, training, and inspiring your employees with digital seminars, roadshows, education programs, and partner days.<sup>45</sup> Engage your human resources team early to help define how team goals, employee performance plans, and rewards need to change. Firms like GE, L'Oréal, Nestlé, and P&G are investing heavily in the digital education of their executive communities to create networks of digital champions across their various regions and brands.<sup>46</sup>
- › **Link outside-in and inside-out thinking.** Map your customer journeys from the outside in. Don't start with your products and services — start with the outcome that your customers seek. Understand the customer experience ecosystem that your firm has created to serve your customers, and then connect this outside-in view of your customers to the business capabilities that you need to help your customers achieve their outcome.<sup>47</sup> Identify the teams, processes, technologies, data, and partners that underpin each customer journey, linking efforts like business capability mapping to customer journey mapping. Firms like British Airways and Telenor are using this combined picture of their organizations to understand how to better serve their customers and to identify which parts of their business they need to change.
- › **Create a cross-functional customer-centric organizational model.** Some firms, like United Airlines and House of Fraser, are ripping up the org chart and reorganizing around the customer life cycle.<sup>48</sup> Others, like Bupa, CVS Caremark, and Westpac, are empowering customer journey owners to create an enhanced customer experience. They start by forming temporary cross-functional teams that can drive change using customer-focused metrics like Net Promoter Score to help guide their actions before progressing to full-scale reorganization to create a truly customer-obsessed enterprise.
- › **Empower the technology management group to focus on systems of engagement.** Technology management teams must play a pivotal role in enabling digital transformation. Digital executives have been able to bypass their technology colleagues in the past by turning to software-as-a-service vendors or agencies. That approach isn't sustainable. Technology teams must step up, hire for digital skills, and help drive enterprisewide transformation. This means that CIOs must champion a business technology agenda — investments in technology, systems, and processes to win, serve, and retain customers.<sup>49</sup>
- › **Protect your customers' trust.** When customers hear daily about government surveillance and data breaches at major retailers, only companies that treat people's data with care will earn consumers' trust.<sup>50</sup> In a world of fluid ecosystems forming and reforming partnerships, treating data with care is crucial. The responsible company gathers only the data that it needs, uses it to



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create context that adds value, asks permission to share data, and shares it only with partners that can add additional value. The way that the iPhone makes its apps ask permission before gathering location data is a perfect example: Apple proves that it is part of a trusted ecosystem but enables apps from weather forecasters, retailers, and travel suppliers to function in a more efficient and personalized way.

- › **Think big, start small, and act swiftly.** No matter what your situation is, the journey to business success in the age of the customer is a radical overhaul of culture, organizational structures, technology, measurement frameworks, and operating models. And it's ongoing. Executives must approach digital business as more than a single program of activity to wrap up and put to bed. This isn't about creating a standalone digital strategy. Digital business must become the new way of being for your firm.
- › **Learn to experiment and cocreate.** Building tangible prototypes is a proven way to demonstrate the potential of digital within your organization. Your existing change process isn't the place for such rapid, tactical delivery. Instead of trying to overhaul your entire development life cycle, go around it. Build an external test-and-learn capability on a cloud platform like Microsoft Azure or Salesforce Heroku. Leverage a partner's lab — most digital agencies have one. Work with a university, and sponsor a few summer students. This approach may not deliver polished customer-ready enterprise-scale solutions, but it may deliver enough to justify the next round of investment.

**What It Means**

## Digital Ecosystems Will Recast The Economy

Tomorrow's winners will be those that understand digital ecosystems and can create new sources of value within them. And in the face of customers' continually changing value perceptions, successful organizations will leach profit away from the losers, changing the power dynamics of global business. eBusiness pros should thus understand that:

- › **Big data will become a crucial economic input.** Traditional value chains are based on the idea that land, labor, and capital are the main inputs to the creation of value. But in the digital world, data is the key factor that lubricates the customer's personal value ecosystem.<sup>51</sup> Companies that stockpile data — like Amazon and Google — will have the advantage in economic models of the future. And companies that generate data — like Pacific Gas and Electric and Telefónica — can reframe their roles in the ecosystem. But the new data barons will circumscribe the profits and autonomy of companies that can see only small pieces of the ecosystem — like producers of commodity physical products.
- › **Companies will evolve to become digital predators or digital prey.** As digital-savvy companies learn to create new sources of customer value through digital, their greater agility and effectiveness will cause profits to flow in their direction. Customers will select these evolved services for their

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personal value ecosystem. These companies will become predators, preying on less-evolved companies. Digital prey may respond by merging, but scale won't save them. Eventually predators will acquire anything valuable, solidify their data feeds, and sell the shells off to the highest bidder. It's happening already — this scenario accurately describes Google's acquisition and subsequent resale of the pieces of Motorola.

- › **Companies must evolve legacy technology systems to survive.** Those 30-year-old COBOL systems sitting in the dark recesses of the mainframe will hold back the companies running them. Eventually car companies, oil and gas companies, and others that depend on these systems will tire of falling behind their agile brethren. Digital service companies will offer to rip and replace these systems for free, and these digital dinosaurs will accept their help. The cost will be agreeing to supply your valuable data feed to these digital disruptors in perpetuity. Having made this bargain, the dinosaurs will find that their new partners know more about their customers than they do themselves. And their former partners — suppliers of legacy enterprise systems — will see digital disruption erode their whole customer base.
- › **Firms with DCX or DOX strength will partner or merge to compensate for weaknesses.** In the old world, vertical integration meant combining suppliers and retailers. In the future, firms with a strong digital customer experience will find it attractive to combine with those that have agile, efficient operations. Integrating the two sides of such companies will be very challenging — they'll have to reassemble as their own internal ecosystem. An example: CVS's acquisition of Caremark and MinuteClinic has enabled it to expand its offerings into business-to-business (B2B) pharmacy services and primary healthcare, cementing its position as a healthcare ecosystem player.
- › **Citizens will expect digital experiences from governments.** Real-life experiences shape citizens' expectations. As their digital experiences in the private sector evolve, governments will be left behind once again, just as they were when the world moved to the internet. The only way for government departments to deliver on citizens' expectations will be for them to embrace a new operating model with citizens' value at the core — after all, the government should work for its citizens. This new operating model will enable efficient service to more people, shrinking the size of government while simultaneously expanding government services (something both liberal and conservative governments can agree on).
- › **Pay-as-you-go products and services will dominate customer ecosystems.** Because of the flexibility that they provide, pay-per-use models will continue to replace ownership models of consumption. The sharing economy that drives models like Airbnb, Elance, and Zipcar positions these firms at the heart of their customers' digital ecosystems. Companies that tap into this model will thrive; businesses that base models exclusively on selling assets directly to customers as a one-time transaction will miss out. As more cities, products, and people (through wearables) become instrumented, firms' ability to turn that mass of data into meaningful charging mechanisms for services will increase.

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- › **Media firms will switch to ecosystem models.** Experiences, not products, are the future. Brands will need to use digital assets to create experiential value. Traditional branding mechanisms like advertising will be worth far less. Media companies, seeing the fading value of traditional brand advertising, will need to find new ways to survive. Their lifeline will be to integrate themselves into appropriate digital ecosystems and help customers satisfy underlying desires. So news companies like The New York Times will integrate into customers' daily downtime alongside entertainment companies like Disney and Netflix.

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## Supplemental Material

### Survey Methodology

The Forrester/Odgers Berndtson Q3 2015 Global Digital Business Online Survey was fielded to 947 Odgers Berndtson clients. Only a portion of survey results are illustrated in this document. For quality assurance, we screened respondents to ensure that they met certain standards in terms of job responsibilities and the size of their organization. For the purposes of this study, respondents were asked to consider “digital business” to include: electronic touchpoints between customers, brand, products, employees, and business operations (including digital marketing); use of web, mobile, kiosks, and/or other internet-connected technologies (e.g., social media); use of emerging digital technologies and sensors within business operations to benefit customers (e.g., RFID tags, 3D printers).

Forrester fielded the survey from July 2015 to September 2015. Respondents were offered no incentive to complete the survey other than a summary of the survey results. Exact sample sizes are provided in this report on a question-by-question basis. This survey used a self-selected group of respondents (executives who have interacted with Odgers Berndtson) and is therefore not random. The survey was fielded only in English. Among the respondents, 68% work in North America, 22% work in Asia Pacific, and 8% work in Europe. Fifteen percent are CEOs, 26% are C-level executives, 43% serve in other executive roles, and 16% are in general management. This data is not guaranteed to be representative of the business population, and unless otherwise noted, statistical data is intended to be used for descriptive and not inferential purposes. While nonrandom, the survey is still a valuable tool for understanding where business executives are today and where the market is headed.

Forrester’s Global Business Technographics® Telecommunications And Mobility Workforce Survey, 2016, was fielded between October 2015 and December 2015. This online survey included 7,342 respondents in Australia, Brazil, Canada, China, France, Germany, India, New Zealand, the UK, and the US from companies with two or more employees.

Forrester’s Business Technographics ensures that the final survey population only includes information workers who use a connected device for work at least 1 hour per day. Research Now fielded this survey on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates.

Please note that the brand questions included in this survey should not be used to measure market share. The purpose of Forrester’s Business Technographics brand questions is to show usage of a brand by a specific target audience at one point in time.

Forrester’s Business Technographics provide demand-side insight into the priorities, investments, and customer journeys of business and technology decision-makers and the workforce across the globe. Forrester collects data insights from qualified respondents in 10 countries spanning the Americas, Europe, and Asia. Business Technographics uses only superior data sources and advanced data-cleaning techniques to ensure the highest-quality data.

**The Digital Business Imperative****Contributors To This Research**

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**Endnotes**

- <sup>1</sup> Source: Forrester Data Mobile, Smartphone, And Tablet Forecast 2016 To 2021 (Global).
- <sup>2</sup> See the Forrester report "[Will People Really Do That?](#)"
- <sup>3</sup> See the Forrester report "[The Customer Life Cycle: A Blueprint For Customer-Obsessed Enterprises.](#)"
- <sup>4</sup> Source: Forrester Data Online Retail Forecast, 2016 To 2021 (US).  
  
By 2018, we expect web-affected retail to account for 34% of all EU-7 retail sales. Source: Forrester Data Web-Influenced Retail Sales Forecast, 2016 To 2021 (EU-7).
- <sup>5</sup> Source: Forrester's Consumer Technographics North American Financial Services Online Benchmark Recontact Survey, Q3 2016 (US).
- <sup>6</sup> Source: Forrester/Internet Retailer Q1 2015 US B2B Buyer Channel Preferences Online Survey.  
  
See the Forrester report "[Death Of A \(B2B\) Salesman.](#)"
- <sup>7</sup> Source: Victor Reklaitis, "The Nasdaq that just eclipsed an all-time closing high is a very different index," MarketWatch, April 23, 2015 (<http://www.marketwatch.com/story/7-ways-the-nasdaqs-changed-since-the-tech-crash-2015-02-27>).
- <sup>8</sup> The \$282 billion in payments that PayPal processes is the value of payments, net of payment reversals, which are successfully completed through PayPal's payments platform, excluding transactions that are processed through its gateway products. The payments platform includes PayPal, PayPal Credit, Venmo, and Braintree products. Source: PayPal (<https://www.paypal.com/us/webapps/mpp/about>).
- <sup>9</sup> Source: "Overview," Netflix (<http://ir.netflix.com/>) and "Comcast Overview," Comcast (<http://corporate.comcast.com/images/comcast-press-kit.pdf>).
- <sup>10</sup> Source: Peter C. Evans and Marco Annunziata, "Industrial Internet: Pushing the Boundaries of Minds and Machines," General Electric, November 26, 2012 ([http://www.ge.com/docs/chapters/Industrial\\_Internet.pdf](http://www.ge.com/docs/chapters/Industrial_Internet.pdf)).
- <sup>11</sup> Source: James McQuivey, Digital Disruption: Unleashing the Next Wave of Innovation, Amazon Publishing, 2013.
- <sup>12</sup> Source: "TotalCare," Rolls-Royce (<http://www.rolls-royce.com/products-and-services/civil-aerospace/services/care-catalogue/totalcare.aspx>).
- <sup>13</sup> DriveNow is a joint venture initiative between BMW Group and Sixt. Source: "Milestone – DriveNow with 500,000 customers," DriveNow press release, September 14, 2015 ([https://prod.drive-now-content.com/stage/fileadmin/user\\_upload\\_de/12\\_Presse/Pressemitteilungen\\_PDF/Englisch/2015/2015.09.14-DriveNow\\_500.000\\_customers\\_EN.pdf](https://prod.drive-now-content.com/stage/fileadmin/user_upload_de/12_Presse/Pressemitteilungen_PDF/Englisch/2015/2015.09.14-DriveNow_500.000_customers_EN.pdf)).
- <sup>14</sup> See the Forrester report "[Brief: The Internet Of Things Will Transform Customer Engagement.](#)"
- <sup>15</sup> See the Forrester report "[Wanted: Disruptive CIOs To Drive Digital Business.](#)"

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- <sup>16</sup> Forty percent of global information workers who leverage social networks on a tablet for work believe that these networks make them more effective and productive, compared with 38% who use them for work on a smartphone and 32% who use them for work on a desktop or laptop. Source: Forrester's Global Business Technographics Applications And Collaboration Workforce Survey, 2015.
- <sup>17</sup> Source: Forrester's Global Business Technographics Telecommunications And Mobility Workforce Survey, 2016.
- The mobile mind shift that people are experiencing at home — to expect everything on a mobile device — drives their mobile expectations at work as well. IT is slow to respond with mobile business apps, so employees plug the app gap on their own. Some bring in productivity apps like Dropbox or Evernote or Quickoffice, and others focus on process apps like Smartsheet or Triplt. For more, see the Forrester report "[Workforce Personas And The Mobile App Gap](#)."
- <sup>18</sup> Source: "American Apparel Finds The Right Fit With Motorola RFID," Motorola Solutions ([http://content.motorolasolutions.com/web/Business/Products/RFID/\\_Documents/Case\\_Studies/\\_StaticFiles/American\\_Apparel\\_Case%20Study.pdf](http://content.motorolasolutions.com/web/Business/Products/RFID/_Documents/Case_Studies/_StaticFiles/American_Apparel_Case%20Study.pdf)).
- <sup>19</sup> Source: "Renault-Nissan AIMS for automation," Automotive Manufacturing Solutions, September 1, 2010 (<http://www.automotivemanufacturingsolutions.com/focus/renault-nissan-aims-for-automation>).
- <sup>20</sup> Source: Stephen Mraz, "Bearings designed to multitask," Machine Design, May 22, 2013 (<http://machinedesign.com/bearings/bearings-designed-multitask>).
- <sup>21</sup> Source: Forrester/Odgers Berndtson Q3 2015 Global Digital Business Online Survey.
- <sup>22</sup> Source: Forrester/Russell Reynolds 2014 Digital Business Online Survey.
- <sup>23</sup> A customer's needs are transactional, whereas a customer's desires reflect the emotions that result from individual purchases. What causes one customer to buy a Toyota Prius and another to buy a Porsche 911 is not a need but a desire. Purchase decisions are charged with emotion, which is one reason why Forrester's new Customer Experience Index (CX Index™) measures the emotions that result from an experience. See the Forrester report "[Introducing Forrester's Next-Generation Customer Experience Index](#)."
- <sup>24</sup> In the age of the customer, your company must exploit digital assets to compete effectively and deliver world-class customer experiences. But moving the business from its traditional roots toward digital mastery requires the CIO and the executive team to paint a compelling digital business vision. See the Forrester report "[How To Craft A Better Digital Vision](#)."
- <sup>25</sup> Source: Marco Iansiti and Karim R. Lakhani, "Digital Ubiquity: How Connections, Sensors, and Data Are Revolutionizing Business," Harvard Business Review, November 2014 ([https://hbr.org/resources/pdfs/comm/jama-software/Digital\\_Ubiquity.pdf](https://hbr.org/resources/pdfs/comm/jama-software/Digital_Ubiquity.pdf)).
- <sup>26</sup> For more information on Rush Hour Rewards, visit the following link. Source: "Learn more about Rush Hour Rewards," Nest (<http://support.nest.com/article/What-is-Rush-Hour-Rewards>).
- <sup>27</sup> Farmers have a whole ecosystem of value — the products and services that they bring together to achieve their desires. By rethinking its business around helping farmers increase yields, John Deere created new digital products and services that create new sources of value for its customers. Source: Nigel Fenwick, "The Digital Bolt-On Conundrum," Nigel Fenwick's Blog, May 16, 2015 ([http://blogs.forrester.com/nigel\\_fenwick/15-05-16-the\\_digital\\_bolt\\_on\\_conundrum\\_0](http://blogs.forrester.com/nigel_fenwick/15-05-16-the_digital_bolt_on_conundrum_0)).
- <sup>28</sup> Citroën generated more than 24,000 submissions to the C1 Connexion design competition, resulting in 14,000 new social media followers. Citroën attributes the sale of more than 500 vehicles to the campaign. Source: "New Citroën C1 Connexion," YouTube video, April 3, 2012 (<https://www.youtube.com/watch?v=5K3hLBGO53s>).
- <sup>29</sup> Vodafone's M-Pesa payment ecosystem has reached massive scale since its 2007 launch in Kenya. It's now present in 10 countries, with more than 18 million subscribers in Kenya alone transferring an estimated €1.1 billion in and out of the ecosystem via a network of some 45,000 agents. Source: "What is M-Pesa?" Vodafone (<http://www.vodafone.com/content/index/what/m-pesa.html>) and "P2P payments: a rapid evolution," Aviso blog, October 31, 2014 (<http://www.aviso.io/p2p-payments-rapid-evolution/>).

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<sup>30</sup> See the Forrester report “[Customer Experience Drives Revenue Growth, 2016.](#)”

<sup>31</sup> See the Forrester report “[Executive Q&A: Customer Experience Governance.](#)”

<sup>32</sup> See the Forrester report “[Case Study: Emirates Uses Customer Journey Maps To Keep The Brand On Course.](#)”

<sup>33</sup> See the Forrester report “[Customer Experience In The Post-PC Era.](#)”

<sup>34</sup> Source: Torry Harris Business Solutions (<http://www.thbs.com/>).

<sup>35</sup> Source: Francesco Federico, “Centralizing Digital Marketing Execution While Retaining Local Markets’ Flexibility,” IgnitionOne Client Summit, June 12, 2015.

Net Promoter and NPS are registered service marks, and Net Promoter Score is a service mark, of Bain & Company, Satmetrix Systems, and Fred Reichheld.

<sup>36</sup> See the Forrester report “[Digital Financial Innovation Requires Matchmaking.](#)”

<sup>37</sup> Source: “Fidor Bank AG: FIDOR Bank reports positive preliminary result for 2014 and continues its growth course,” Fidor Bank press release, February 19, 2015 (<https://www.fidor.de/documents/presse/2015-02-19-cn-positive-preliminary-result.pdf>).

<sup>38</sup> See the Forrester report “[Brief: Leverage Design Thinking To Spark A Customer-Obsessed Innovation Culture.](#)”

<sup>39</sup> Source: Daniel Boos, “Dank Human Centered Design mehr Nähe zum Kunden,” Swisscom, September 27, 2013 (<https://ict.swisscom.ch/2013/09/dank-human-centered-design-mehr-naehe-zum-kunden/>).

<sup>40</sup> Source: Bosch (<https://www.bosch-si.com/solutions/manufacturing/industry-4-0/working-group.html>).

<sup>41</sup> In cities such as Beijing and London, where dense real estate doesn’t allow for extensive car lots, Audi has created Audi City virtual dealerships that let customers visualize and personalize their model of Audi using interactive and tactile displays. When the customer leaves the dealership, he or she is given a USB drive that’s shaped like an Audi key with the saved configuration so that the customer can reference it at home or back in the dealership. See the Forrester report “[There Is No Internet Of Things — Yet.](#)”

<sup>42</sup> Source: Nike ([http://www.nike.com/us/en\\_us/](http://www.nike.com/us/en_us/)).

<sup>43</sup> See the Forrester report “[Case Study: BBVA Takes An Iterative Approach To Innovation.](#)”

<sup>44</sup> See the Forrester report “[The Chief Digital Officer: Fad Or Future?.](#)”

<sup>45</sup> See the Forrester report “[Build An Effective Digital Education Program.](#)”

<sup>46</sup> Source: Peter C. Evans and Marco Annunziata, “Industrial Internet: Pushing the Boundaries of Minds and Machines,” General Electric, November 26, 2012 ([http://www.ge.com/docs/chapters/Industrial\\_Internet.pdf](http://www.ge.com/docs/chapters/Industrial_Internet.pdf)).

<sup>47</sup> See the Forrester report “[Linking Customer Engagement To Business Capabilities In The Age Of The Customer.](#)”

<sup>48</sup> Source: Nicola Harrison, “House of Fraser embarks on ‘pioneering’ customer-centric restructure,” RetailWeek, July 8, 2015 (<http://www.retail-week.com/people/house-of-fraser-embarks-on-pioneering-customer-centric-restructure/5076778.article>).

<sup>49</sup> See the Forrester report “[Technology Management In The Age Of The Customer.](#)”

<sup>50</sup> See the Forrester report “[The New Privacy: It’s All About Context.](#)”

<sup>51</sup> In a digital world, data plays a big role in helping your firm win, serve, and retain its customers. Not only do you often need more and different data, you need bigger thinking on how to use data and bigger capabilities to help you put all available data to use. Forrester defines big data as: The practices and technologies that close the gap between the data available and the ability to turn that data into business insight.



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Big data isn't just about volume; it's also about the characteristics of data. Today's available data is more diverse and messier than what you are used to. And because it's often not owned or controlled by your organization — e.g., open data, consumer preferences, and partner data — it challenges your natural tendency toward data hoarding. To find out more about the benefits of embracing big data, see the Forrester report "[Big Data's Big Meaning For Marketing](#)."



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