

The Forrester Wave™: Collaborative Work Management Tools, Q4 2020

The Nine Providers That Matter Most And How They Stack Up

by Margo Visitation
November 18, 2020

Why Read This Report

In our 32-criterion evaluation of collaborative work management (CWM) tool providers, we identified the nine most significant ones — Asana, Atlassian, Microsoft, monday.com, ServiceNow, Smartsheet, Workfront, Workplace from Facebook, and Wrike — and researched, analyzed, and scored them. This report shows how each provider measures up and helps application development and delivery (AD&D) professionals select the right one for their needs.

Key Takeaways

Workfront, Wrike, And Smartsheet Lead The Pack

Forrester's research uncovered a market in which Workfront, Wrike, and Smartsheet are Leaders; ServiceNow, Asana, monday.com, and Microsoft are Strong Performers; Atlassian is a Contender; and Workplace from Facebook is a Challenger.

Workflow, Collaboration, And Enterprise Capabilities Are Key Differentiators

As CWM becomes mainstream, content collaboration, workflow design, and organization of digital work at the enterprise level become critical features. Delivering those capabilities, along with improved analytics, dictate which providers lead the pack.

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Content Collaboration, Enterprise Capabilities, And Automation Are Key

2020's legacy will be chaos and challenge. The pandemic is forcing organizations to shut down physical offices, requiring employees to work remotely. Physical distancing brings new challenges to bear. How can teams work together, and how can organizations preserve productivity when they're not colocated? Collaboration tools such as Slack and Teams help with ad hoc conversations and sharing information, but firms need greater organizational capabilities — tracking projects and automating processes to remove delays that occur when employees cannot walk over to their coworkers' desks to collaborate face-to-face. CWM solutions that help employees work together more efficiently initially entered organizations virally via team downloads and then spread as digital workers moved onto new teams. The solutions' usability extended the viral spread as companies found value in using them to solve a variety of use cases. Forrester defines CWM tools as:

Software tools that support the confluence of project and process work by allowing users to create personal and team workspaces; invite other users, internal and external to the organization, to collaborate on digital artifacts; identify workload requirements and capacity; and allocate activities to other users to deliver on work items and then track progress.

Seventy-five percent of surveyed global information workers are satisfied with their CWM solution.¹ As a result, CWM solutions are potential solutions as demand for managing formal and ad hoc workstreams and workload management expands across the enterprise.

CWM customers should look for vendors that provide:

- › **Strong content collaboration within the solution.** With more workers remaining remote, content collaboration is expanding beyond a marketing or development use to provide support for procurement, legal, operations, and other capabilities. Having this resident functionality enables teams to collaborate more effectively on shared content, underscored by built-in approval workflow to enhance repeatable processes. As enterprise adoption grows, content consolidated within workspaces must also support improved audit capabilities.
- › **Enterprise-level work management and end-user workflow design capabilities.** The flexibility of CWM solutions initially created great work experiences for individuals and small teams. As adoption grew, vendors continued to expand capabilities to scale project and process management while retaining individualized work experiences. Introducing end-user workflow design supports the need for a wide variety of process automations in an enterprise environment.² Enhanced security and permissions configurations become a necessity to support extended adoption.
- › **Analytics and machine learning to support predictive work planning.** Driving up productivity for digital workers requires access to critical data, which in turn is used to assess capacity to support prioritization and allocation decisions. Early CWM implementations relied on simple filtering techniques to provide reporting, but enterprises require more sophisticated analysis to make

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workload planning decisions. Vendors must provide resident abilities to develop graphic reporting and interactive dashboards while leveraging gains in machine learning to provide recommendations for allocations and schedules during capacity planning.

Evaluation Summary

The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market and does not represent the entire vendor landscape. You'll find more information about this market in our reports on [CWM](#).

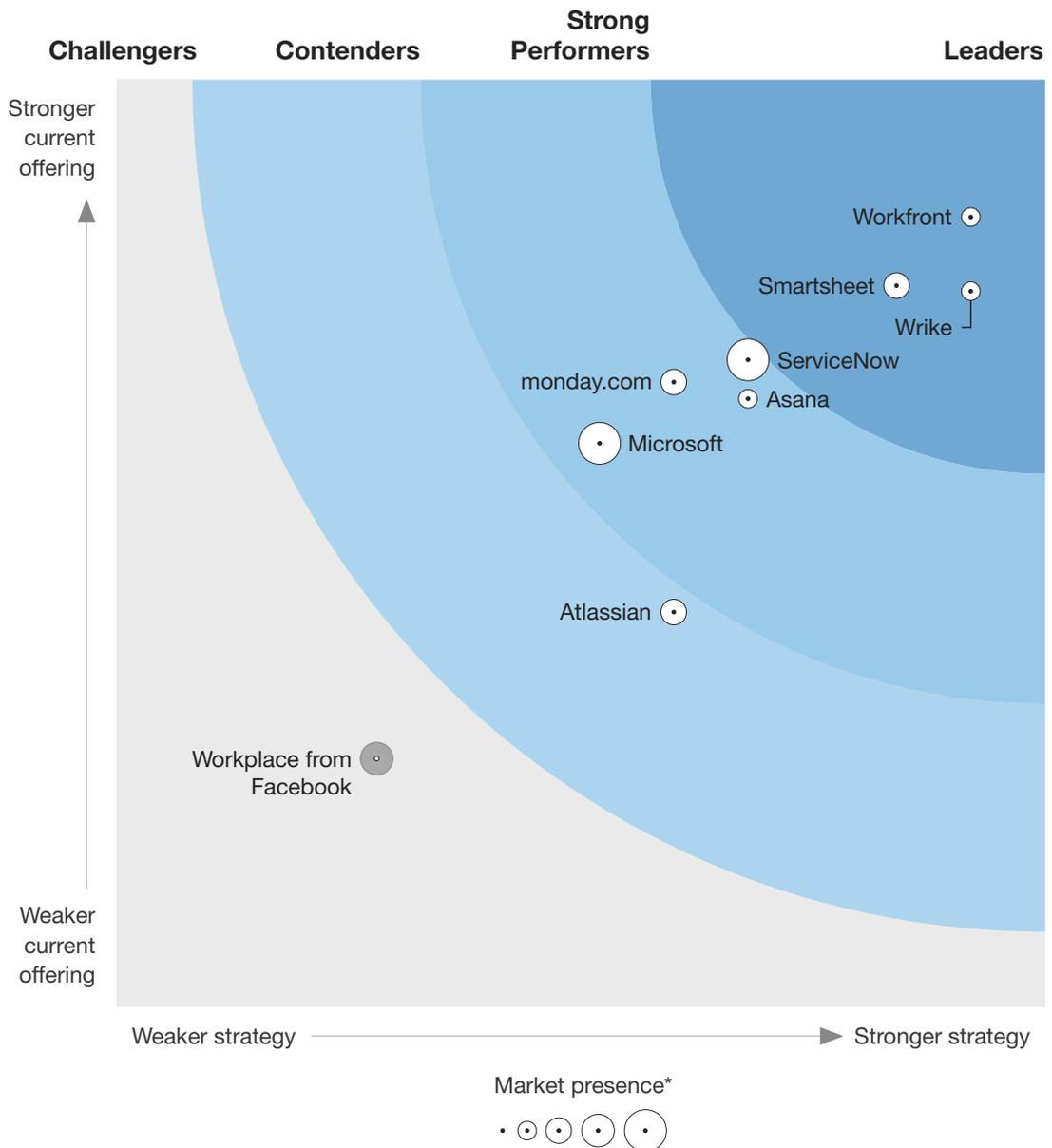
We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

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FIGURE 1 Forrester Wave™: Collaborative Work Management Tools, Q4 2020

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Collaborative Work Management Tools
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*A gray bubble indicates a nonparticipating vendor.

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FIGURE 2 Forrester Wave™: Collaborative Work Management Tools Scorecard, Q4 2020

	Forrester's weighting	Asana	Atlassian	Microsoft	monday.com	ServiceNow	Smartsheet	Workfront	Workplace from Facebook*	Wrike
Current offering	50%	3.28	2.13	3.04	3.37	3.49	3.89	4.26	1.34	3.86
Collaboration	25%	3.66	2.32	2.32	3.00	1.68	3.66	5.00	1.32	5.00
Work management	10%	3.66	3.00	3.00	3.66	3.66	4.32	3.66	0.67	4.34
Enterprise capabilities	20%	2.50	0.25	2.25	2.50	5.00	3.50	4.50	1.25	3.50
Automation	15%	3.00	3.00	4.00	5.00	4.00	5.00	4.00	1.00	2.00
Data and analytics	10%	3.50	2.50	3.50	3.00	3.00	3.50	4.00	1.25	3.00
Consulting, training, and support	5%	3.00	1.00	3.00	3.00	3.00	5.00	5.00	1.00	5.00
UI/user experience	5%	5.00	3.00	3.00	5.00	3.00	3.00	3.00	3.00	5.00
Technology capabilities	10%	3.00	3.00	4.60	3.00	5.00	3.40	3.40	2.20	3.80
Strategy	50%	3.40	3.00	2.60	3.00	3.40	4.20	4.60	1.40	4.60
Product vision	20%	5.00	1.00	3.00	3.00	3.00	5.00	5.00	1.00	5.00
Innovation roadmap	20%	5.00	3.00	1.00	5.00	3.00	3.00	3.00	3.00	3.00
Planned enhancements	20%	3.00	3.00	3.00	3.00	3.00	5.00	5.00	1.00	5.00
Execution roadmap	20%	3.00	3.00	1.00	3.00	3.00	5.00	5.00	1.00	5.00
Partner ecosystem	20%	1.00	5.00	5.00	1.00	5.00	3.00	5.00	1.00	5.00
Market presence	0%	2.00	2.50	5.00	3.00	4.50	3.00	2.00	3.50	1.50
Revenue	25%	3.00	5.00	5.00	3.00	5.00	5.00	3.00	5.00	3.00
Number of customers	25%	3.00	3.00	5.00	5.00	5.00	3.00	1.00	5.00	1.00
Average deal size	25%	1.00	1.00	5.00	3.00	3.00	1.00	1.00	1.00	1.00
Number of enterprise installations	25%	1.00	1.00	5.00	1.00	5.00	3.00	3.00	3.00	1.00

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

*Indicates a nonparticipating vendor

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Vendor Offerings

Forrester included nine vendors in this assessment: Asana, Atlassian, Microsoft, monday.com, ServiceNow, Smartsheet, Workfront, Workplace from Facebook, and Wrike (see Figure 3). We invited Workplace from Facebook to participate in this Forrester Wave, but it chose not to participate, and we estimated its capabilities in order to include it in the assessment as a nonparticipating vendor.

FIGURE 3 Evaluated Vendors And Product Information

Vendor	Product evaluated	Product version evaluated
Asana	Asana	N/A (SaaS)
Atlassian	Trello, Confluence, Jira Software, Jira Core	N/A (SaaS)
Microsoft	Microsoft 365 (including Planner, Lists, Teams, and SharePoint) and Project	Microsoft 365 E3 and Project Plan 3
monday.com	monday.com	N/A (SaaS)
ServiceNow	Now Platform	Orlando Release
Smartsheet	Smartsheet	N/A (SaaS)
Workfront	Workfront	20.3
Workplace from Facebook	Workplace from Facebook	N/A (SaaS)
Wrike	Wrike	N/A (SaaS)

Vendor Profiles

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

Leaders

- › **Workfront provides the strongest feature set for enterprise operational ecosystems.** Unlike its competitors, Workfront has always taken an enterprise-first approach to CWM. Starting with departmental implementations over viral spread via individuals or teams, Workfront provides robust planning and tracking capabilities to support planned work. Marketing and IT are Workfront's leading verticals; it is moving into business process and professional services implementations.

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With approximately 16% of its customers supporting 1,000 users or more, the vendor remains focused on enterprise implementations. While its product roadmap is excellent, its innovation roadmap remains comparable with competitors’.

Workfront’s strengths fall into three categories: enterprise capabilities, content collaboration, and analytics. Of the vendors included in this evaluation, Workfront provides the most comprehensive portfolio management, resource management, and financial management capabilities. Content collaboration is comprehensive, supporting a wide range of file types, dynamic content, and workflows for review approval. Enterprise capabilities support autoresource planning via the workload balancer and flexible collaboration internally and externally. Workfront’s analytics enables users to leverage metadata and native fields to model reports; Fusion, Workfront’s integration platform, allows users to bring in third-party data to build highly tailored reports. Customers reported strong customer support, robust process support, and transparency as positives but cautioned that the tool requires a focused change management effort. Workfront best suits companies that have a developed work management vision and ability to consume enterprise change.

- › **Wrike’s work management capabilities outpace its competitors’.** Targeting marketing, IT, and professional services organizations, Wrike has significantly expanded its global presence over the past two years and now has 20,000 total corporate customers. While the total number of implementations of 1,000 users or more is still small, the customers that have rolled out at an enterprise level have several-thousand users. To support its expansion from team tool to enterprise implementations, the vendor has deepened its security and scalability investments to support its land-and-expand strategy.

Wrike continues to deliver a strong user experience for work management, leading its competitors in combining depth with ease of use. The vendor also delivers strong vertical content in marketing, IT, and agencies to support specific use cases. Content collaboration, predefined workflow, and templates allow users to get started quickly. Automation of mundane processes enables teams to ratchet up productivity. Customers note the solution allows them to harmonize their processes to improve transparency and drive up customer satisfaction. Customers noted that the vendor’s capabilities support strong planning and delivery practices that reduce work-in-progress conflicts and increase output but could improve focus on large clients. Wrike best suits companies that want a quick start with strong content and analytics.

- › **Smartsheet excels in providing dynamic work management for the enterprise.** Smartsheet holds a leadership position by addressing a rapidly changing work environment. Founded in 2005, the vendor that originally started as an online spreadsheet now has more than 83,000 domain paying customers across multiple industries. Smartsheet’s emphasis on enterprise has seen strong investment in security, integration, and scalability in order to address a wide range of use cases. The vendor has also made significant acquisitions to address marketing use cases and strategic capacity planning. While Smartsheet is one of the top vendors in the evaluation, initial investments in machine learning and AI are still works in progress.

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Smartsheet provides a broadly flexible method for managing work. Key components include sheets that contain the core work-related data, reports that aggregate data to provide multisheet feedback and insight, and dashboards that aggregate data across sheets, reports, and web content for real-time reporting. Targeting workflows that are automated and human-driven for data-centered collaboration and content-centered work, Smartsheet addresses enterprise needs for both planned and unplanned work well. The vendor has placed greater emphasis on pragmatic no-code workflow design for the end user and provides an attractive user experience to build an adaptable solution for the enterprise. Customers noted fast time-to-value and ease of use but would like more intuitive dashboards. Smartsheet best suits companies that have a wide range of formal and ad hoc use cases and need flexibility at enterprise scale.

Strong Performers**› ServiceNow offers the power of a platform but otherwise provides a generic offering.**

Unlike other participants in this evaluation, ServiceNow's CWM solution is not offered as a pure-play product standalone module but as part of the vendor's core platform. ServiceNow offers capabilities that focus on IT, business, employee, and service management. Focusing on a horizontal approach that includes industries such as financial services, healthcare, government, and manufacturing, the vendor continues to build out features that support strategic planning, operational processes, and technology management.

ServiceNow well suits existing customers that want to automate work management at an enterprise level. The vendor's platform and low-code capabilities provide clients with the ability to automate workflows to optimize a variety of business or delivery processes at an enterprise level. Robust security and permissions allow customers to create collaborative work environments. Native integration with strategic planning and operation capabilities supports establishing transparency at every level of the enterprise. Core work management capabilities are accessible and competent but generic in nature. Its content collaboration capabilities are weak, compared with its competitors; customers have to rely on third-party content collaboration solutions for more advanced requirements. Customers noted the strength of the platform as its biggest benefit but would like more specific CWM capabilities. ServiceNow best suits existing customers that want to further integrate CWM practices.

› Asana delivers great customer experience but lacks depth in enterprise features. Asana provides CWM to more than 3.5 million free accounts in marketing, HR, IT, sales, product, and design in 82,000 paid organizations across 190 countries. The vendor's mission is to help teams cut down on nonproductive time and leverage collaboration to optimize empowered teams. Focusing on developing a framework that leverages an objectives and key results (OKRs) metrics practice is a differentiator that drives organizationwide engagement.

Based on customer feedback, Asana delivers an outstanding user experience from implementation to ongoing support. The ability to connect teams together seamlessly with little overhead enables users to work together regardless of where they are located. Where Asana shows gaps

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in its offering is as teams scale. While the vendor offers baseline enterprise features, portfolio management, analytics, and financials need greater depth to meet enterprise needs. Customers loved the ease of use and their relationship with the vendor but have little positive feedback on enterprise use. Asana best suits companies that want great customer experience, combined with transparency, but don't mind a lack of enterprise features.

- › **Monday.com offers usability and fast automation but lacks enterprise integrations.** Monday.com has a global audience of more than 100,000 domain paying customers. However, only a very small percentage are at the enterprise level. The vendor delivers quick implementation, low barriers to entry, and a fast path to transparency. Monday.com enables end users to create work environments that fit a number of use cases. Taking a horizontal approach, the vendor provides a work management solution that doesn't restrict teams to a particular methodology or approach. Using grids and boards, customers can construct workspaces that connect to share information.

The vendor continues to present an aggressive, unique roadmap and thus far has been able to deliver on promised features. Focusing on making work management transparent and easy, monday.com allows users to create customized workflows and notifications to manage both planned projects and ad hoc work. Users can nest boards to collaborate across multiple workstreams and roll up the data for reporting progress. Administration can be federated enough to extend workspace creation, invitations to collaborate, and automation recipes to users with appropriate permissions. Customers note that the user experience makes implementation easy, and responsive customer support enables teams to self-learn in order to leverage the solution in nontypical use cases. However, workboard nesting complicates enterprise data aggregation, and the vendor lags behind its competitors in offering integrations to enterprise tools. Monday.com best suits companies that want to supply teams with easy-to-configure work management automation.

- › **Microsoft offers functionality but not a lot of coherence in managing work.** Microsoft's CWM solution is comprised of Planner, Lists, Teams, and SharePoint from its Office 365 suite. While the vendor provides a wide array of tools with collaborative aspects, it doesn't articulate a CWM strategy with work at the core. Instead, Microsoft suggests that Teams is the starting point, and users then choose other tools to support different work needs. Microsoft takes a horizontal approach — everyone collaborates, but the vendor relies on partners for industry-specific templates and content.

Teams sits at the center of Microsoft's CWM offering. Leveraging the messaging app's channel capability to organize how people work together, Teams acts as the jumping off point for building work plans or organizing personal work. About half of what a team needs to do in managing day-to-day work can be accomplished in Teams, but for planning formal work, users must shift to Planner. Larger or more complex projects require Project or a third-party planning tool. Sharing Office content is easy, but Teams must integrate with third-party content management for proofing other file types. Microsoft's CWM offering lacks the ability to aggregate and roll up work to a portfolio level. Microsoft's CWM offering best suits groups or small teams focused on CWM in an Office 365 ecosystem.

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Contenders

- › **Atlassian's CWM solution is a good start but needs to build for scale.** Atlassian leverages Trello, Confluence, Jira Software, and Jira Core as its CWM solution. Addressing the needs of developers and business users, Atlassian cuts across industries to take a horizontal approach. The vendor estimates that two-thirds of Fortune 500 companies use Atlassian products because of its land-and-expand strategy. Atlassian's low barrier to entry strongly supports its team-oriented approach, and within its suite of applications, it offers tools to support a variety of different work requirements.

Low barriers to entry and easy-to-use tools make Atlassian very attractive for organizations embarking on their work management journey, and its cloud architecture enables sizable implementations. But when it comes to CWM, the vendor is still evolving its enterprise approach. Based on customer feedback, Trello provides a great user experience but struggles with managing workspaces for larger teams. Atlassian has presented a highly strategic roadmap to further expand Trello's scalability and integration with content collaboration and Atlassian's enterprise planning solution Jira Align. If it adheres to this roadmap, Atlassian will offer strong competition to the other vendors in this evaluation. Customer feedback noted that at a small-group level, the vendor delivered robust, highly usable functionality, but companies found scaling to be a challenge. Atlassian well suits developer-centric organizations that want to support cross-functional teams.

Challengers

- › **Workplace from Facebook keeps everyone on the same page but lacks core features.** Workplace quickly grew from 3 million paid users in October 2019 to more than 5 million in mid-2020. Strong chat, streaming, and videoconferencing features are core to the Workplace experience, with advanced capabilities like autocaptioning and autotranslation baked in to enable easier communication across the 40-plus supported languages. Workplace groups are the primary tools for collaboration, and group layouts should be familiar if you are one of the 3 billion people who use the consumer version of Facebook. Groups can be configured using basic privacy settings like open, closed, or secret, and external collaborators can be invited to join groups without paying the monthly fee to join Workplace. Workplace has an integration marketplace with 80-plus out-of-the-box connectors to tools like Smartsheet, SharePoint, Google Drive, and ADP.

The Workplace insights platform provides some basic analytics, but metrics largely focus on engagement and other user sentiment measures and are not geared toward those who need to track work completion or measures of efficiency or progress. Workplace lacks native work management features like capacity, portfolio, and work planning/execution management that are basically table stakes for the other vendors in this evaluation. Workplace focuses squarely on communication and has built a tool that is familiar and easy to adopt by anyone but is not a powerful work management tool. Workplace from Facebook declined to participate in the full Forrester Wave evaluation process.

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Evaluation Overview

We evaluated vendors against 32 criteria, which we grouped into three high-level categories:

- › **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include content collaboration, internal and external collaboration, review and approval, enterprise capabilities, and automation.
- › **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated product vision, innovation roadmap, planned enhancements, execution roadmap, and partner ecosystem.
- › **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's revenue, number of customers, average deal size, and number of enterprise installations.

Vendor Inclusion Criteria

Forrester included nine vendors in the assessment: Asana, Atlassian, Microsoft, monday.com, ServiceNow, Smartsheet, Workfront, Workplace from Facebook, and Wrike. Each of these vendors has:

- › **Subscription revenue.** Annual CWM tool subscription revenue was at least \$120 million.
- › **Global presence.** The vendor has data centers in three separate regions and sales and support in five or more countries. The vendors' CWM offering must demonstrate the ability to support a global client base with sufficient technical and customer support capabilities. Enterprise clients require dedicated customer success and account support.
- › **Enterprise presence.** At least 15% of the vendor's corporate customers have implementations of at least 2,000 seats.

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Supplemental Material

Online Resource

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

The Forrester Wave Methodology

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

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In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by September 4, 2020, and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with [The Forrester Wave™ Vendor Review Policy](#), Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with [The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy](#) and publish their positioning along with those of the participating vendors.

Integrity Policy

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

Endnotes

- ¹ Base: 10,749 global information workers. Source: Forrester Analytics Business Technographics® Workforce Survey, 2020.
- ² Enabling citizen development cuts down on the need for continual changes to enterprise applications from IT. While still an emerging capability, low-code applications provide flexibility to support self-service applications. See the Forrester report "[The Forrester Wave™: Digital Process Automation Service Providers, Q3 2020.](#)"

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