

The Forrester Wave™: Disaster-Recovery-As-A-Service Providers, Q2 2019

The Eight Providers That Matter Most And How They Stack Up

by Naveen Chhabra

April 17, 2019

Why Read This Report

In our 34-criterion evaluation of disaster-recovery-as-a-service (DRaaS) providers, we identified the eight most significant ones — DXC Technology, Flexential, IBM, iland, InterVision, Recovery Point Systems, Sungard Availability Services, and TierPoint — and researched, analyzed, and scored them. This report shows how each provider measures up and helps infrastructure and operations (I&O) professionals select the right one for their needs.

Key Takeaways

Sungard Availability Services And IBM Lead The Pack

Forrester's research uncovered a market in which Sungard Availability Services and IBM are Leaders; iland, TierPoint, and InterVision are Strong Performers; Recovery Point Systems, DXC Technology, and Flexential are Contenders.

Orchestration, Infrastructure Support, And Security Services Are Key Differentiators

As hypervisor-based recovery technology becomes standard across providers, improving capabilities on key differentiating criteria will dictate which providers will lead the pack. Vendors that can support heterogeneous infrastructure and provide application-level orchestration and security services position themselves to successfully deliver managed recovery services to their customers.

The Forrester Wave™: Disaster-Recovery-As-A-Service Providers, Q2 2019

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Table Of Contents

- 2 DRaaS Providers Are Improving Their Capabilities But Need To Do More
- 3 Evaluation Summary
- 6 Vendor Offerings
- 6 Vendor Profiles
 - Leaders
 - Strong Performers
 - Contenders
- 10 Evaluation Overview
 - Vendor Inclusion Criteria
- 11 Supplemental Material

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The Forrester Wave™: Disaster-Recovery-As-A-Service Providers, Q2 2019

The Eight Providers That Matter Most And How They Stack Up

DRaaS Providers Are Improving Their Capabilities But Need To Do More

In the digital business era, customers, employees, partners, and regulators expect business services to always be available, no matter what. The leading causes of outages now include cyberattacks in addition to IT failures, power failures, administrator errors, and natural disasters.¹ Business leaders know that they need dependable infrastructure to deliver a great customer experience.² But just one in five I&O pros is very confident of their capability to serve clients in the event of a disruption.³ Firms lack the technologies or processes to confidently deal with outages. All stakeholders expect firms to take advantage of the latest technology and be able to serve them in their moment of need. As such, firms look to partner with DRaaS providers to improve their recoverability confidence.

DRaaS providers are improving their abilities in multiple dimensions to help I&O pros. As a result of these trends, DRaaS customers should look for providers that:

- › **Orchestrate recovery workflows for business apps, not just VMs.** Businesses expect dependable application services.⁴ Virtual machine (VM) recovery is necessary but not sufficient for application recovery. I&O pros must collaborate with application, network, and security peers to instantiate business apps and ensure that service dependencies are met, networks are configured, and security services are operational before offering the apps for business use.⁵ Today's digital businesses demand that applications come into production as quickly as possible — so service providers' ability to automate and orchestrate recovery workflows for business apps to improve your service-level agreement achievements is key.
- › **Support heterogeneous technology infrastructure.** While firms have standardized on virtual infrastructure, many business-critical applications continue to run on proprietary systems. For recovery, firms apply different technologies including storage, application, or VM-based replication. DRaaS providers' ability to support such heterogeneous technology infrastructure is of paramount importance. If a provider can't support the technology you use, it will have a negative impact on your overall recoverability, plans, and procedures.
- › **Improve the security and compliance of recovery infrastructure.** More than 20% of respondents to a Forrester survey cited cyberattacks as a cause of outages.⁶ Cyberattacks are increasing in intensity, frequency, and impact with every passing year. During an outage caused by a cyberattack, firms have the ability to recover from recovery infrastructure. Because the recovery infrastructure assumes the role of primary production infrastructure, its security must be equal to or better than the primary infrastructure. You don't want to end up in a situation where the recovery infrastructure is also compromised. Firms need to evaluate the service providers' ability to offer the security tools infrastructure.

The Forrester Wave™: Disaster-Recovery-As-A-Service Providers, Q2 2019

The Eight Providers That Matter Most And How They Stack Up

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 other reports on DRaaS providers.⁷

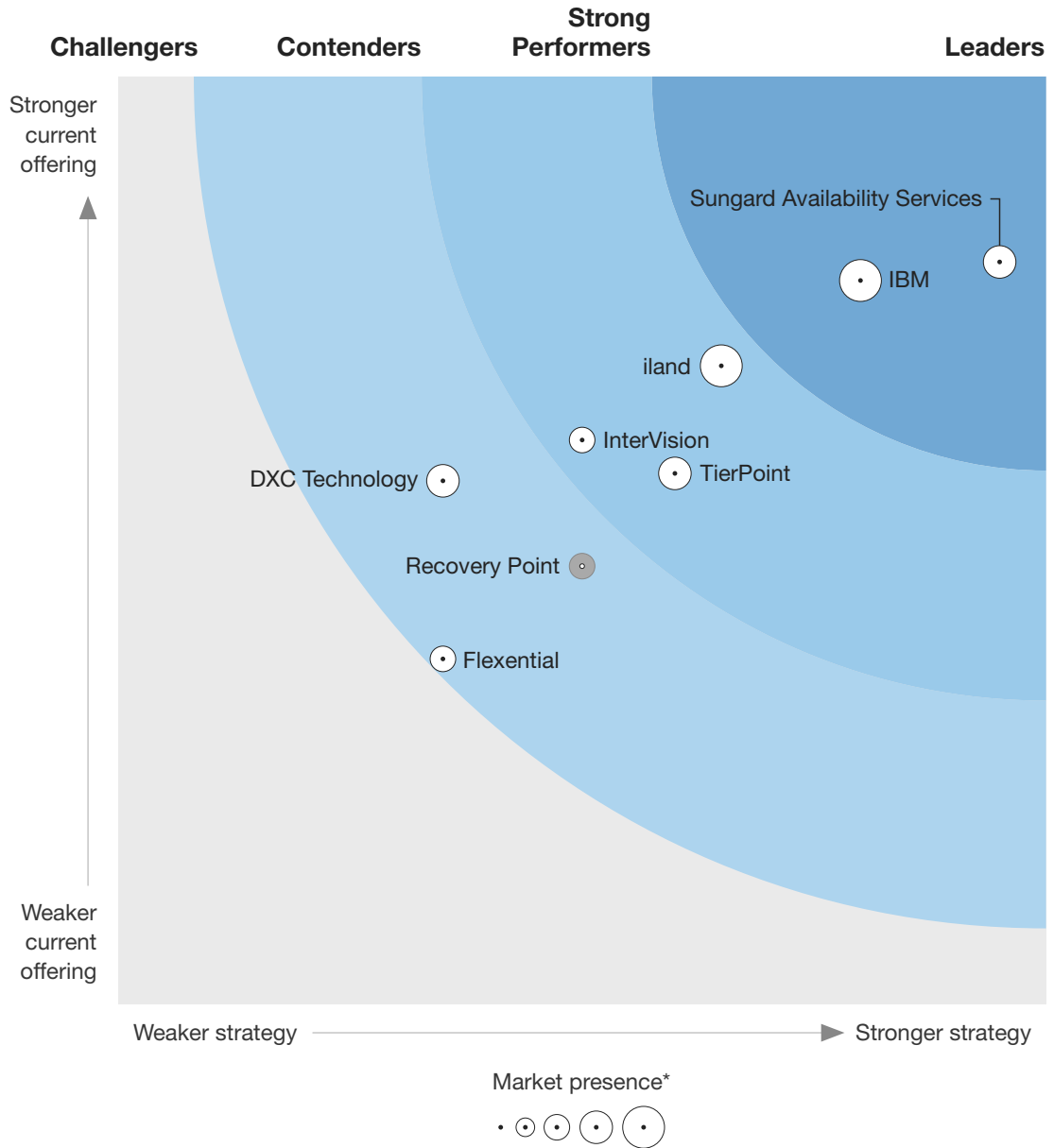
We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

The Forrester Wave™: Disaster-Recovery-As-A-Service Providers, Q2 2019

The Eight Providers That Matter Most And How They Stack Up

FIGURE 1 Forrester Wave™: Disaster-Recovery-As-A-Service Providers, Q2 2019

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 Q2 2019



*A gray bubble indicates a nonparticipating vendor.

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The Eight Providers That Matter Most And How They Stack Up

FIGURE 2 Forrester Wave™: Disaster-Recovery-As-A-Service Providers Scorecard, Q2 2019

	Forrester's weighting	DXC Technology	Flexential	IBM	iland	InterVision	Recovery Point*	Sungard Availability Services	TierPoint
Current offering	50%	2.82	1.86	3.90	3.44	3.04	2.36	4.00	2.86
Core DRaaS offerings	8%	3.00	5.00	3.00	5.00	5.00	3.00	3.00	3.00
Recovery objective capabilities	8%	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00
Technology support	10%	2.40	1.00	5.00	3.00	2.40	2.20	5.00	1.80
Data transfer	8%	3.00	3.00	5.00	5.00	3.00	5.00	5.00	5.00
Change management	8%	3.00	1.00	3.00	3.00	3.00	1.00	5.00	1.00
Ownership of recovery tasks	7%	3.00	1.00	5.00	3.00	3.00	3.00	5.00	3.00
Data resiliency and risk mitigation	8%	1.00	1.00	1.00	3.00	1.00	1.00	1.00	1.00
Security	8%	1.50	2.50	5.00	4.50	5.00	3.00	4.00	3.00
Self-service management	7%	1.00	1.00	3.00	3.00	5.00	1.00	1.00	5.00
Self-service reporting	8%	3.00	1.00	3.00	3.00	3.00	1.00	5.00	3.00
Consulting services	5%	5.00	1.00	5.00	3.00	3.00	3.00	5.00	3.00
Scale	5%	3.00	1.00	5.00	1.00	1.00	1.00	5.00	3.00
Supported disaster declarations	5%	5.00	1.00	5.00	5.00	1.00	3.00	5.00	3.00
Concurrent failure handling	5%	5.00	3.00	5.00	3.00	3.00	3.00	5.00	3.00
Strategy	50%	1.75	1.75	4.00	3.25	2.50	2.50	4.75	3.00
Service offering strategy	50%	1.00	1.00	4.00	2.00	1.00	2.00	5.00	3.00
Corporate strategy	50%	2.50	2.50	4.00	4.50	4.00	3.00	4.50	3.00

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

*Indicates a nonparticipating vendor

The Forrester Wave™: Disaster-Recovery-As-A-Service Providers, Q2 2019

The Eight Providers That Matter Most And How They Stack Up

FIGURE 2 Forrester Wave™: Disaster-Recovery-As-A-Service Providers Scorecard, Q2 2019 (Cont.)

	Forrester's weighting	DXC Technology	Flexential	IBM	iland	InterVision	Recovery Point*	Sungard Availability Services	TierPoint
Market presence	0%	3.83	2.30	4.60	4.07	2.30	2.43	4.00	3.80
Install base	15%	5.00	3.00	5.00	3.00	3.00	3.00	5.00	5.00
Revenue	10%	5.00	3.00	5.00	3.00	3.00	3.00	5.00	5.00
Revenue growth	10%	0.00	1.00	1.00	5.00	1.00	1.00	1.00	1.00
Employees	15%	5.00	1.00	5.00	3.00	1.00	1.00	5.00	5.00
Geographic scope	10%	5.00	1.00	5.00	5.00	1.00	1.00	3.00	1.00
Customer feedback	20%	3.67	3.00	5.00	4.33	5.00	3.67	3.00	5.00
Technology partners	20%	3.00	3.00	5.00	5.00	1.00	3.00	5.00	3.00

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

*Indicates a nonparticipating vendor

Vendor Offerings

Forrester included eight vendors in this assessment: DXC Technology, Flexential, IBM, iland, InterVision, Recovery Point Systems, Sungard Availability Services, and TierPoint.

Vendor Profiles

Our analysis uncovered the following strengths and areas of improvement of individual vendors.

Leaders

- › **Sungard AS uses app-level orchestration to serve the most complex deployments.** Sungard Availability Services (Sungard AS) can serve client needs at all stages of their need for business continuity (BC). It assesses the success and failure of DR tests or invocations and ties SLAs to financial penalties. Sungard AS presents the recoverability state as a “resilience score” that includes elements that affect recovery, including previous test successes and trends, recovery life-cycle management, and applied automation. The provider manages large-scale infrastructure recovery using application discovery and dependency mapping, automated change management, and advanced orchestration tools that automate recovery tasks at a business application level.

The Forrester Wave™: Disaster-Recovery-As-A-Service Providers, Q2 2019

The Eight Providers That Matter Most And How They Stack Up

Sungard AS could be even better with improved dashboards and more advanced self-service reporting. It stands to gain by offering services that will help clients recover during outages caused by cyberattacks. Sungard AS will improve its ability to communicate its value to different stakeholders by simplifying its messaging and eliminating the complexity associated with its breadth of services.

- › **IBM has a comprehensive BC/DR portfolio.** In 2017, IBM acquired Sanovi's intellectual property around DR workflow automation. Rebranded as IBM Resiliency Orchestrator, it uses more than 600 predefined workflows to offer fully integrated, simplified DR automation. IBM Resiliency Orchestrator automates the DR process, manages recovery workflows, and reduces recovery time, operating costs, and DR drill testing time. Each runbook operates at an abstracted level, integrates various data movers, and implements a static model of application dependency hierarchy. Its reporting dashboard enables resiliency pros to track and monitor recovery point objectives (RPOs) and recovery time objectives (RTOs) in their DR environments. Recovery objectives and achievements are presented corresponding to a VM and/or a business application. IBM's granular audit trail lists every executed task and its results to serve environments that demand complex workflows. IBM's portfolio includes services like BC planning, risk assessment, consulting, design, and implementation.

IBM can scale better by offering its clients a real-time resiliency score that reflects the health of the infrastructure, the level of automation, test results, and trends. Resiliency Orchestrator will be better with real-time knowledge of application changes and rapidly changing application dependencies.

Strong Performers

- › **iland layers its recovery services atop secure infrastructure.** iland delivers its secure DRaaS services using Carbonite, Veeam Software, and Zerto as the data movers. Its self-service console and homegrown orchestration platform integrate the underlying data movers and make it easy to perform all recovery operations from a single console. Fully managed services manage and document failover testing and procedures. Once failover is executed, iland scans systems regularly for viruses, vulnerabilities, file integrity, firewall events, web reputation, application control, and intrusions. The provider partners with BC consultants that evaluate DRaaS options and make recommendations. It maintains a series of certifications and attestations to industry-specific compliance requirements. Via its Secure Cloud Console, iland provides a list of self-service reports summarizing recovery achievements, protection, failovers, recovery settings, network mapping, operation details, recovery steps, start time, end time, logs, security posture, and compliance.

With broader platform support, iland could be even better. Like many providers, iland lacks broad coverage of the heterogeneous technology infrastructure common in most enterprises. Orchestration at the hypervisor level serves a limited purpose, and iland currently lacks the ability to orchestrate the recovery of the complex, interdependent application environments that all enterprises operate.

The Forrester Wave™: Disaster-Recovery-As-A-Service Providers, Q2 2019

The Eight Providers That Matter Most And How They Stack Up

- › **TierPoint is strategically investing in and strengthening DRaaS services.** TierPoint, a data center provider with 40 locations across the US, works with many vendors to bring the latest technology to its mix of supported platforms. It partners with Data Storage Corporation and APSU to help clients protect and recover IBM AIX and iSeries infrastructure, respectively. Clients can expect TierPoint to integrate these technologies and platforms into its customer portal within a few months. TierPoint partners with managed application service providers to serve application recoverability needs. It has developed a service portal that integrates all of the data movers that it uses to deliver DRaaS. It continues to enhance the service portal to present the most relevant metrics via the dashboard. TierPoint supports Double-Take, Microsoft Azure Site Recovery, and Zerto for replication, storage-based replication, and Oracle and SQL log shipping. It supports clients that bring their own security infrastructure. TierPoint offers consulting services including risk assessment, business impact analysis, and IT DR.

TierPoint will improve by strengthening the self-service reporting portal and presenting the metrics in a contextual manner. It will improve its ability by onboarding a runbook automation tool that can tie data movers together and connect recovery workflow steps in an application-centric manner. It will improve its ability to deliver by integrating into clients' change management processes and developing the capability to identify application dependencies.

- › **InterVision has a well-rounded recovery offering for virtualized workloads.** InterVision acquired Bluelock to expand its DRaaS and infrastructure-as-a-service offerings and can serve clients across a range of RTO/RPO requirements. Its Portfolio DR services portal is a consolidated decision support system for a client's entire recovery environment spanning recovery, drills/testing, and documentation repository. Its recovery health feature is an automated near-real-time assessment of a client's recovery environment. InterVision offers historical test results on the self-service portal. It developed most of its IT processes around ServiceNow, so a client's environment can send production changes to InterVision's ITSM for real-time change tracking. InterVision clearly articulates the responsibility and accountability between itself and the client and offers a variety of managed security services that strengthens its position to serve clients by securing the recovery infrastructure. Clients can bring their own security infrastructure for additional security requirements like application firewall, patch management, real-time alerting, and distributed denial of service prevention.

InterVision could be even better with improved heterogeneous platform support. Given the firm's client base and exposure, its primary challenge is that it delivers recovery services for industry-standard x86 infrastructure and lacks support for heterogeneous platforms. InterVision can improve the recovery health feature by considering factors that play into business application recovery.

Contenders

- › **Recovery Point Systems serves complex custom engagements well.** Recovery Point supports physical and virtual environments, including complex, heterogeneous ones installed across hybrid data center configurations. It offers a comprehensive RACI chart that outlines all possible activities

The Forrester Wave™: Disaster-Recovery-As-A-Service Providers, Q2 2019

The Eight Providers That Matter Most And How They Stack Up

and tasks for all phases of recovery as well as assisted and managed services.⁸ Recovery Point partners with Avalution Consulting for BC planning. Clients can bring in their own physical or virtual security devices. One of Recovery Point's unique differentiators is customer obsession — as part of the onboarding process, every customer receives a clear escalation hierarchy going up to top executive management. Clients must navigate through many portals to ensure that they get the right recovery solution. The provider's client portal acts as a landing page and redirects clients to independent portals from technology partners like Capital Continuity, VMware's vCloud Director, and Zerto.

Recovery Point could be better by unifying its multiple tool interfaces. Its manual, document-based runbook is quite comprehensive but can be cumbersome for a client with a complex, heterogeneous environment — a potential impediment to shorter recovery times. Recovery Point declined to participate in our research. Scores are based on Forrester estimates.

- › **DXC Technology has global competency in continuity and recovery services.** Following the merger of CSC and HPE Enterprise Services, DXC Technology rationalized its DR services platform and capabilities. It serves client DR needs for a variety of heterogeneous infrastructure requirements. DXC adopts a holistic view of end-to-end continuity, and its services range from next-day to same-day recovery services. DXC employs mature policies like dynamic capacity models and exclusion zones to deliver continuous services to multiple clients during mass outages. DXC's BC consulting services help clients align business with technology via a robust continuity plan and managed implementation. It currently uses the Microsoft Azure Site Recovery platform for replication and the administrator portal. The client dashboard displays the high-level status of all protected data and gives visibility into the achievement of RTOs and RPOs.

DXC Technology could get better by improving its support for application recoverability. Enterprises relying on DR services expect much wider visibility into the state of operational recoverability. DXC expects to soon standardize on a new technology platform underpinning its DR services; this will enable it to enhance its services offerings and platforms. Automating change identification on primary infrastructure and replicating those changes over to the recovery infrastructure presents a growth option for DXC.

- › **Flexential can help kick-start a IT DR program fairly quickly.** Taking a consultative approach to client engagements and striving to offer an optimal solution, Flexential brings in industry-standard data movers like Zerto to help clients recover their virtual and physical infrastructures. It offers security services and helps clients improve the security posture of their recovery infrastructure. Flexential splits its offerings into standard and professional services; clients can engage professional services for elements that the standard offering does not cover, such as runbook customization and application-specific configuration support. Flexential adheres to various industry-specific compliance requirements.

The Forrester Wave™: Disaster-Recovery-As-A-Service Providers, Q2 2019

The Eight Providers That Matter Most And How They Stack Up

Flexential can improve its service capability by orchestrating recovery workflows, providing better self-service reporting, and publishing appropriate metrics provided by data movers and other supported operations tools. It will bolster its capability by understanding application dependencies and orchestrating the workflows corresponding to applications rather than just those for VM recovery. Flexential can get stronger by partnering with BC and IT DR consultants that guide application tiering by criticality, which feeds into solution design.

Evaluation Overview

We evaluated vendors against 34 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 technology support, change management, ownership of application-level recovery, security services, and self-service options.
- › **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated service provider's value proposition, pricing options, contract terms, and road map.
- › **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's revenue, revenue growth, client feedback, ecosystem partnerships, and employee strength.

Vendor Inclusion Criteria

Forrester included eight vendors in the assessment: DXC Technology, Flexential, IBM, iland, InterVision, Recovery Point Systems, Sungard Availability Services, and TierPoint. Each of these vendors has:

- › **Managed recovery services from the provider's cloud.** The DRaaS providers evaluated offer managed recovery services that are hosted in their data center or cloud.⁹ These providers have also developed parts of services and reporting dashboards that they can provide in a self-service manner. We did not include service providers that offer recovery infrastructure that clients can only use as self-service or those that only host services with hyperscale cloud providers such as Amazon Web Services and Microsoft Azure.
- › **At least two data center locations from which it renders services.** The DRaaS providers evaluated have at least two data center locations to ensure that they can serve firms in different locations and that the only data center does not become a single point of failure.
- › **Significant numbers of paying DRaaS customers and VMs under management.** The DRaaS providers evaluated have at least 150 paying clients, at least 20% of which must have at least 75 virtual machines under management.

The Forrester Wave™: Disaster-Recovery-As-A-Service Providers, Q2 2019

The Eight Providers That Matter Most And How They Stack Up

- › **At least two commercially available technology solutions powering DRaaS services.** The DRaaS providers evaluated support at least two replication technologies — hypervisor-based, host-based, application-based, or storage-based — that power DRaaS services.¹⁰
- › **A proven history of service delivery.** The DRaaS providers evaluated have all been offering services in production (not in beta) for at least three years in a row in the period ending in December 2018.

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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™: Disaster-Recovery-As-A-Service Providers, Q2 2019

The Eight Providers That Matter Most And How They Stack Up

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.

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 February 8, 2019 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 See the Forrester report "[Ransomware Is A Business Continuity Issue.](#)"
- ² Technology resiliency has grown in importance as services become more complex and distributed. See the Forrester report "[Business Technology Resiliency Matters More Than Ever](#)" and see the Forrester report "[Design For Dependability By Embracing A Future Of Trusted Technology.](#)"
- ³ See the Forrester report "[The State Of Business Technology Resiliency, Q2 2017.](#)"
- ⁴ See the Forrester report "[Design For Dependability By Embracing A Future Of Trusted Technology.](#)"
- ⁵ See the Forrester report "[Vendor Landscape: Disaster-Recovery-As-A-Service Providers, Q4 2016.](#)"
- ⁶ See the Forrester report "[Ransomware Is A Business Continuity Issue.](#)"
- ⁷ A comprehensive list of the DRaaS providers is available in the following report. See the Forrester report "[Vendor Landscape: Disaster-Recovery-As-A-Service Providers, Q4 2016.](#)"

The Forrester Wave™: Disaster-Recovery-As-A-Service Providers, Q2 2019

The Eight Providers That Matter Most And How They Stack Up

⁸ RACI stands for “responsible, accountable, consulted, and informed.”

⁹ DRaaS solutions are prepackaged services that provide a standard DR failover to a cloud environment that you can buy on a pay-per-use basis with varying rates based upon your RPO and RTO. Service providers either deploy agents to replicate data and applications or use image-based backups to send data to the cloud. The critical feature is that the provider can run customers’ production environments out of the cloud during disaster declarations or testing. See the Forrester report “[An Infrastructure And Operations Pro’s Guide To Cloud-Based Disaster Recovery Services.](#)”

¹⁰ There’s a range of replication technologies that are lower-cost, more bandwidth-efficient, and help reduce RTO and RPO. See the Forrester report “[The Past, Present, And Future Of Replication.](#)”

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