

The Value Of Commercial Marketplace For Microsoft Partners

A Total Economic Impact™ Partner Opportunity Analysis

Introduction

Microsoft's commercial marketplace helps partners connect with Microsoft's customers, go to market with Microsoft's sellers and partner ecosystem, and reduce operating costs and selling complexity. Partners can publish technology and service offerings once and sell three ways: 1) through Azure Marketplace, Microsoft AppSource, and in-product customer-facing storefronts; 2) through the Microsoft reseller/partner network; and 3) through the Microsoft field salesforce. As part of another Total Economic Impact (TEI) study looking at how Microsoft partners realize benefits, Forrester interviewed 16 partners with different levels of experience selling through the storefronts, the reseller network, and the Microsoft field salesforce.¹ In addition to experience level with the commercial marketplace, partners varied greatly in terms of size, geography, and solution offerings. The partners who have seen the greatest benefits from Commercial Marketplace are "born in the marketplace," meaning their business model is marketplace-first/only. For them, many of the benefits described in this study should be larger and accelerated. The commercial marketplace is approximately 18 months old, so the findings in this study show early successes and are indicative of future, increased partner opportunities.

Partners reported that the commercial marketplace helps them increase their marketing to fill the sales funnel, win more deals, and close those deals faster with less cost and effort. They noted that Microsoft's commitment to making partners successful is especially important. This is consistent with Forrester's 2020 Wave looking at North American public cloud platforms, which scored both Microsoft's partner ecosystem and marketplace strategy five-out-of-five.² Four key takeaways from this study are:

1. **The commercial marketplace underpins multichannel sales models.** In addition to listings directly in Azure Marketplace, in Microsoft AppSource, and in products such as Dynamics and Office 365, the commercial marketplace supports a partner's direct salesforce through awareness and transacting capabilities as well as the Microsoft field sales and reseller channels. This means partners of all types can benefit and improve all of their sales channels, whether they are "born in the marketplace" and selling 100% through storefronts or use it solely for marketing purposes. Every 1% improvement in win rates increases expected revenues by \$205,000 to \$475,000 per hundred reseller- and/or Microsoft field sales-generated leads.
2. **The commercial marketplace and Marketplace Rewards make it easier for partners to work with Microsoft.** Partners that do not have a long-established relationship with Microsoft can quickly take advantage of Microsoft's global marketing and sales engines via the commercial marketplace. With Marketplace Rewards, the commercial marketplace essentially becomes the entry point for go-to-engagement with Microsoft. Listing is the only requirement for participation and, depending on a partner's engagement in marketplace, can unlock evergreen sales, marketing, and technical enablement benefits from Microsoft. Well-established partners can layer Marketplace Rewards on top of everything they are already doing with Microsoft. This helps partners grow and improve their business at all stages of the sales funnel, from awareness to sales enablement. Partners estimated the equivalent value of program engagement to be between \$75,000 to \$100,000 per quarter.
3. **The commercial marketplace makes it easier and less expensive to sell to and manage customers.** Transacting in storefronts simplifies or removes many steps in the sales process, such as setting up as a new vendor and compliance due diligence. Additionally, the integrations between a customer's account, the commercial marketplace back-end systems, and a partner's systems streamline deployments and ongoing management. Every one-month reduction in a sales cycle creates a one-time monthly recurring revenue (MRR) recognition benefit of between \$5,000 and \$26,750 per transaction.
4. **The COVID-19 pandemic is increasing marketplace importance.** A recent Forrester Analytics Business Technographics® survey asked 1,755 IT purchase influencers which provider types they expect to increase using because of COVID-19.³ The second highest category was online marketplaces at 26%, following cloud service providers at 36%.

The next three sections describe how service-led partners — e.g., managed service providers (MSPs) and systems integrator (SIs) — and technology-led partners — e.g., integrated software vendors (ISVs) said they are selling more, improving marketing, and streamlining operating costs and complexity. The Partner Economic Opportunity section then provides a quantified framework for how a partner can apply these benefits to their organization. Lastly, the study shares best practices and recommendations that partners can follow to achieve more rapid success.

Increasing Sales

Increasing sales involves two factors: generating more leads and improving win rates. The commercial marketplace helps partners do both in their direct and indirect sales effort. A prospect may follow many paths to get to the commercial marketplace and eventually buy a partner's technology or service-based solution. These include user self-discovery, marketing campaigns that direct a prospect to a storefront, and a partner's direct salesforce using storefronts to close deals. Customers may also be directed to the commercial marketplace storefronts by the reseller network or Microsoft field sales, and/or these two channels can transact on a customer's behalf.

Partners said that they could expand their total addressable market (TAM) via commercial marketplace in three main ways:

- › Partners can now sell anywhere in the world where a prospect can transact online with Microsoft. This means immediate geographic expansion without the need for additional sales teams or office expansions.
- › Partners can also open access to selling their offers via Microsoft's extensive cloud solution provider (CSP) network.
- › Partners can sell up to larger organizations they may not have been able to by leveraging Microsoft's brand, and they can sell down to smaller, higher-volume customers by taking advantage of the commercial marketplace efficiencies. Regarding the value of leveraging the Microsoft brand, one partner said: "Attaching ourselves to Microsoft's brand helps with geographic expansion. We are a European company, and [Microsoft] AppSource is making it easy for us to expand into the US."

Directing prospects to storefronts as part of a marketing campaign was an effective way of generating leads. One partner described: "We ran a digital marketing campaign from April through June. There were 2,900 click-throughs into our page on Azure Marketplace. That resulted in 619 leads, of which 124 did trial downloads. We got 30 face-to-face meetings. We estimated the marketing influence on our pipeline was \$237 million." Even better, prospects can find partners' offerings on their own, which reduces the need for marketing spend and guessing whom to target. As one partner explained: "It is pretty common for people to find us in Azure Marketplace, spin up a free trial, and contact sales. Those are some of our best leads because they have a high win rate. Our average deal size is \$40,000 ARR [annual recurring revenue]."

Sales leads are only valuable if they actually result in a sale. Sales transacted in the commercial marketplace storefronts make it easier and faster for partners to close deals; their win rates can go up. This helps in several ways. First, transacting via a storefront removes a lot of the sales friction. Customers can buy directly from Microsoft, which eliminates effort and cost around conducting security and compliance due diligence, negotiating a new contract and other legal requirements, and setting up a new vendor. All of these are especially difficult when expanding internationally. Partners shared the following examples of how sales became more frictionless and faster:

- › "We had a prospect in New Zealand. To close the deal would have required a lot of legal work and setting up a local trading company. We encouraged them to buy via the marketplace. What had been four months of prior effort then closed in only a couple of weeks."
- › "Absolutely, without a doubt, [the marketplace] accelerates sales. We are in the healthcare space, so our customers are risk-averse when it comes to adding new technologies. Typical sales cycles include months of architectural, security, and governance reviews. One of the biggest value propositions is that anything in there is blessed by Microsoft and best-in-class. From a time-to-market perspective, that is big. We've always been on Azure, so the difference is [the marketplace] and customers' perceptions."
- › "We launched in Azure Marketplace last quarter. Our typical sales cycle is six months, so we should have had zero sales so far. Instead, we've already had two big wins, each worth around \$500,000 in ARR. In one case, we were already co-selling with Microsoft to one prospect when COVID broke out. This accelerated the deal [because] they can transact without additional paperwork. The deal was won in two or three weeks. Phenomenal."
- › "We are taking advantage of marketplace opportunities in many ways. We are selling consulting services and building ISV packages for Azure. We also have 15 Dynamics ISV and consulting offerings in [Microsoft] AppSource. This area is growing very rapidly."

Some prospects only want to buy via Microsoft because they have an existing commercial relationship. This may be especially true for larger companies that manage a carefully curated vendor list. Many of the interviewed partners stressed this point as a large benefit, with one saying, "There are many deals that wouldn't get done at all if they had to be on our own paper."

The commercial marketplace storefronts include Test Drive and Free Trial options that enable a try-before-you-buy model so prospects can appreciate the full value of a solution. This makes prospects much more likely to ultimately make a purchase. One partner summed it up by saying, “Pretty much everyone who does a free trial stays on with us afterwards.” Microsoft provides partners with visibility into who is undertaking a free trial, which helps partners follow up and win those opportunities. “Free trials are the best kind of lead we can get. These prospects need to be walked through the onboarding process, which is something we can do with Azure Marketplace. Other platforms sometimes hide their names.”

Another way partners said storefronts helped them increase sales was by moving the last steps of their traditional sales processes here to shorten those steps and to free up salespeople to hunt for new deals. Partners said that the Private Offers capability was especially valuable in helping close more complex deals. “Private Offers is very useful. We use it to give discounts and bundle in services to get customers going faster.”

As mentioned above, reseller networks and the Microsoft field salesforce can sell partners’ solutions either by transacting on a customer’s behalf or directing them to a commercial marketplace storefront. Many interviewed partners said that they are expanding their existing reseller network to include Microsoft cloud solution providers (CSPs) who have the relationships and skills needed to sell and deliver solutions built on and for Azure, Dynamics 365, Microsoft 365, and other Microsoft products. The commercial marketplace includes a payout component to incentivize this network to sell on behalf of partners in the Marketplace. Some examples of engaging the Microsoft partner network to sell more included:

- › “We have seen partners transacting on their customers’ behalf. They find the marketplace to be an easier process, which reduces friction in the sales cycle.”
- › “We want to make things easy for our resellers. If they want to go through the Partner Center, AppSource, or direct, we will do it however they want.”
- › “If a CSP or an MSP is spinning up our solution in Azure Marketplace on behalf of a customer, we can see it. That allows our sellers to engage with the partner and prospect quicker.”

Co-selling with Microsoft is an essential part of many partners’ go-to-market strategies, and almost everyone wants to work more closely with Microsoft field sales. Microsoft sellers are incentivized to work with partners in two ways: sales compensation and quota relief. Although field sellers may not be directly transacting a large number of deals, they are pushing prospects to partner offerings, which can be transacted via storefronts. Additionally, partners are using their Microsoft AppSource and Azure Marketplace presences to engage with and educate sellers. Partners can also use Marketplace Rewards to strengthen co-sell/co-market opportunities. One partner described recently completing two deals in Azure Marketplace (including the New Zealand deal described earlier) that had a substantial Microsoft co-sell component - each was worth approximately \$500,000. Another partner said that it sees a lot of traffic in Microsoft AppSource from the Microsoft field. Sellers are looking for more information on the partner’s solutions so that they can make recommendations to customers. This same Microsoft AppSource partner also said: “We have done a lot of training for the Microsoft sales team. This has resulted in them sending information about our solutions to a lot of their prospects.”

Improving Marketing

A partner’s presence in the commercial marketplace can do two things: 1) It can drive directly attributed sales as described above, and 2) it can build awareness, which may influence a sale. The earlier example of a marketing campaign that took prospects to the Azure Marketplace page and drove \$237 million in marketing-influenced pipeline depicts how the commercial marketplace increases opportunities across all sales channels. For many partners, their first efforts in Azure Marketplace and Microsoft AppSource are to build awareness rather than to transact. One SI has created nine cloud service offerings around strategy, migration, and managed services. Currently, these offerings are for awareness, but the SI sees a future in which “people transact because it is a much easier way to buy.”

The Marketplace Rewards program can be a large part of partners’ marketing efforts. Marketplace Rewards are designed to help partners sell more and cover all stages of selling, including awareness, demand generation, co-selling, lead development, and sales enablement. It is a good example of how Microsoft is trying to ease discoverability and access to go-to-market engagement with Microsoft for its partners. This program is unique within the Microsoft ecosystem in that it is directly tied to a partner’s engagement in the commercial marketplace. This makes it easier and faster for newer partners to reap the rewards of a Microsoft relationship compared to other programs that may involve multiyear efforts to become a higher-tier partner.

Partners described how they used the commercial marketplace and Marketplace Rewards to increase the frequency and effectiveness of marketing campaigns. One partner said: “Our marketplace customer base grew 27% last year in terms of the number of customers and 25% in terms of revenue. We used 17 different rewards in the past year that helped us expand our relationships and win new customers.” Another partner landed 210 demos in a six-month period through a Marketplace Rewards email nurture campaign.

Microsoft’s funding of co-marketing campaigns is also a cost-avoidance benefit. Partners can spend more on marketing without it coming out of their own pocket. A small ISV with 50 employees estimated that the marketing support and rewards it receives from Microsoft were “probably worth \$75,000 to \$100,000 last quarter.”

Streamlining Operations And Costs

Doing more with the commercial marketplace helps partners improve various parts of their business. This was alluded to earlier in the discussion around deal closure being made easier by transacting in the marketplace because many activities such as establishing a commercial relationship are reduced. This improves salesforce productivity, which reduces selling costs and frees up time for more “hunting.” One interviewee stressed this point, saying “sales productivity has absolutely gone up, which has reduced our selling costs.” Because of this, partners are increasingly moving sales transactions to the commercial marketplace. Looking to the future, one partner is transforming its sales model so that it “will become a hybrid one in which salespeople do the hunting and transacting takes place via [the commercial marketplace]. That saves salespeople a lot of paperwork and time on other less valuable activities.”

The commercial marketplace also streamlines operations and reduces costs after the sales cycle is complete. Affected activities include initially deploying solutions and ongoing account management. Partners shared the following examples:

- › “When a customer buys via the marketplace, we associate the subscription ID to the transaction. This means we know where to deploy our solution and can automate the process.”
- › “Deployment is very automated, which eliminates the need for professional services to set up a new customer.”
- › “This makes it significantly easier to handle everything around billing and money collection.”
- › “Invoicing is all automated [in the commercial marketplace], which saves us money and time.”

One partner described how Azure Marketplace in particular has helped reduce the time and cost of bringing new technology solutions to market. The interviewee said that launching the offering on the Azure platform was the quickest the partner has ever brought something to market. This was due in large part to their ability to have an open beta listing within Azure Marketplace, which accelerated the feedback loop. The plan is to use Azure Marketplace for betas in the future to generate similar results.

Commercial marketplace analytics capabilities are very important to partners as they increase sales and optimize related operations and costs. On the sales front, analytics helps partners create better in-marketplace listings, run more effective marketing campaigns (with or without the use of Marketplace Rewards), and streamline sales processes. Partners are also using analytics to understand better which SKUs are resonating with customers to make product improvements to increase win rates and customer satisfaction. Partners shared the following examples of how they make use of marketplace analytics:

- › “We get a lot of intelligence around A/B testing. Since we transact in AppSource, we test things like the value of free trials.”
- › “We get a lot of metrics from [the commercial marketplace]. I use the top-of-funnel metrics to improve my campaigns, and my product people get information about which SKUs are being used and how.”
- › “We get more information about free trials that we might not get from other marketplaces. If it is a CSP or MSP acting on behalf of their customer, we can see who everyone is, and our sellers can engage the prospects faster.”
- › “We get good information about which templates customers are deploying. We can compare that to their size, which helps us create more usable versions of our solutions.”

Partner Economic Opportunity

The preceding sections described the many ways partners benefit from the commercial marketplace. These benefits are tied together here, along with other Azure Marketplace- and Microsoft AppSource-specific examples from the broader Azure partner opportunity study, to provide partners guidance on how to quantify the potential financial benefits to their organizations. Given the differences between all partners in terms of what they sell, their total size, their business model, and how they engage with the commercial marketplace, there is no single number to apply. Instead, partners can use this as a framework to calculate how they may benefit from participating in the commercial marketplace.

The first area to consider is sales that take place entirely within storefronts — Microsoft AppSource, Azure Marketplace, or in-product purchases. The first variable is the percentage of total transactions that fall into this category. Partners reported this ranging from single digits to 100%. As described earlier, many to all of these transactions would not otherwise take place because of an expanded TAM. There are several drivers of an increased TAM, including international expansion, winning deals they otherwise would not have access to because a prospect only wants to transact on Microsoft's paper, and/or leveraging the Microsoft brand helps get into these accounts. The second variable is how much a new customer is worth. This includes licenses as well as a wide range of professional and managed services.

The Azure partner opportunity study created a middle-ground assumption that 10% of sales leads are directly transacted via the storefront. The model also assumed that the three-year potential value at the lower end of a middle-ground scenario was worth \$457,000 in licenses and services. For this hypothetical partner, if it were to win 100 new customers per year, all of the same value, this would result in \$4.57 million in increased revenues spread out over three years (100 new customers x 10% x \$457,000). One ISV with \$40 million in total related revenues had marketplace results along these lines: "We have had \$6 million in lifetime sales in Azure Marketplace. We are currently at \$400,000 in MRR, and it is growing 25% per year." Readers should estimate, based on past or expected future performance, the percentage of sales that would take place primarily because of the commercial marketplace storefronts and apply this volume to their average deal value, whether it is measured as ARR, average contract value (ACV), or lifetime value (LTV).

Potentially larger than direct storefront transactions for some partners is how the commercial marketplace can help sell more via resellers and Microsoft field sales. The other Forrester partner study looked at typical channel mixes for partners selling mostly technology solutions and those selling mostly services solutions. For the former, Microsoft field sales and a partner's reseller network, which would expand with other Microsoft partners, accounted for 45% of deal flow. For service-led partners, these two channels totaled 38%. How participation in the commercial marketplace improves deal flow and win rates in these indirect channels will vary significantly from one partner to the next. As an example, every 1-percentage-point increase in win rates could have the following impacts:

- › Technology-led partner opportunity, for every 100 expected new customers: 100 customers x 45% through resellers and Microsoft field sales x 1% increase in sales wins = .45 additional deals. x \$457,000 average three-year potential deal value = \$205,650 from a 1-percentage-point increase in win rates.
- › Service-led partner opportunity, for every 100 expected new customers: 100 customers x 38% through resellers and Microsoft field sales x 1% increase in sales wins = .38 additional deals. x \$1.25 million average three-year potential deal value = \$475,000 from a 1-percentage-point increase in win rates.

Selling via the commercial marketplace can reduce the sales cycle because steps such as security and compliance due diligence, contract negotiation, and finalizing payment methods are reduced or eliminated. For partners with a recurring revenue model, a lost month of MRR is never recouped. This means closing a deal faster improves that year's financials, which can have the added benefit of increasing a partner's market valuation. Partners can think of every one-month reduction in the sales cycle in the following ways:

- › Technology-led partner opportunity: Expected first-year license ARR (with attach rates applied) = \$321,000/12 months = \$26,750 in additional MRR for each accelerated month.

- › Service-led partner opportunity: Expected first-year license ARR (with attach rates applied) = \$60,000/12 months = \$5,000 in additional MRR for each accelerated month.

Marketplace Rewards include many Microsoft-funded marketing rewards, driving additional pipeline and sales; this impact is mostly covered in the financial modeling above. Partners should also consider what the actual cost savings are compared to funding these initiatives themselves if they wanted to undertake the same level of marketing. Their situations will vary based on the quantity and type of rewards the partners utilize. An earlier example was of a small ISV with 50 employees that estimated the value of its rewards from a cost avoidance perspective to be between \$75,000 and \$100,000 in the previous quarter. Partners should look at the rewards available to them and assign an estimated cost avoidance value.

The commercial marketplace can reduce different cost categories. The financial examples above include shortening sales cycles, which reduces selling costs and taking advantage of Microsoft-sponsored marketing, which can be a cost avoidance. Other cost savings include solution deployment and activation when transacted as well as ongoing account management cost such as billing and collection. Partners should look at their processes, financial analyses, and any cost-based activity models to determine what the impact on their operating margins are for these activities. These margin improvements can then be applied to the volume and value of deals being transacted in Microsoft AppSource, Azure Marketplace, or in-product sales to determine the contribution to their company.

Investments, Best Practices, And Call To Action

The partners that are seeing the most success in the commercial marketplace are investing considerable time and effort in several key areas. Each represents a best practice and is something Forrester recommends a partner do to best achieve the various marketplace-related benefits described in this study.

Partners are designating one or more individuals, depending on their size, to manage their presence in the various storefronts and their relationship with the Microsoft commercial marketplace team. This is typically a core part of their alliance team and may solely be the alliance manager at smaller partners. Managing Marketplace Rewards is a very large part of this effort to ensure that as many as possible are being used in the most advantageous ways.

Partners are educating their internal sales teams and reseller networks on why they are participating in the commercial marketplace and how these sellers can benefit from it. They especially need to understand how they will be compensated for opportunities that they originate but are then transacted in Microsoft AppSource, Azure Marketplace, or in-program storefronts. One partner said: "We make sure that our sellers know that marketplace exists and shouldn't be scared. We incentivize both our partners and sales team to transact in marketplace."

Related to educating the salesforce is making the necessary changes to sales systems and processes. This can include taking data feeds from Azure Marketplace and AppSource to attribute sales correctly and ensure that closed deals are transitioned to deployment and execution. A partner explained: "We had to make changes in our sales operations. Getting revenue recognition right for our sales reps and partners was especially important."

Partners are creating and executing marketing campaigns that are tied to their storefront presences. The study earlier gave the example of a marketing campaign that directed people to the Azure Marketplace page and resulted in \$237 million in marketing-attributed pipeline. Marketing budgets are usually greater than what is being funded by Microsoft via Marketplace Rewards. These budgets cover the digital spend as well as internal and agency labor to create and manage campaigns.

Being successful requires regular data analysis of what is working and what needs to be improved in the commercial marketplace. This includes listing content, marketing campaigns, and what direct and indirect sellers are doing successfully. This also includes analyzing which SKUs are actually selling and what improvements can be made to products and services listed in the marketplace properties to increase sales. These analyses require a lot of effort, and some partners have multiple people dedicated to this effort.

Conclusions

Microsoft's commercial marketplace is a core element of how Microsoft helps many partner types succeed. It is a platform in which a partner can publish once and sell through the Azure Marketplace, Microsoft AppSource, and in-

product storefronts as well as through resellers and the Microsoft field salesforce. The benefits include selling more by increasing TAM and win rates, making the sales processes easier and faster, and reducing operating costs.

Achieving success requires partners to invest effort into the commercial marketplace and their broader Microsoft relationship. Partners get out what they put into their storefronts, channel relationships, and use of Marketplace Rewards. Analyzing all aspects of their participation, from marketing campaign success rates to win-loss analysis to best-selling products, is one of the most important things a partner can do, and Microsoft provides access to tools and data to do this. As customers interact with and purchase more through the commercial marketplace, it will become an increasingly important driver and measure of most partners' success.

About Commercial Marketplace

Learn more about publishing to and selling via Azure Marketplace <https://azuremarketplace.microsoft.com/en-us/sell> and via Microsoft AppSource <https://appsource.microsoft.com/en-us/partners> .

Endnotes

¹ Source: "The Revenue And Growth Opportunities For Microsoft Azure Partners," Forrester Consulting report prepared for Microsoft, July 2020.

² Source: "The Forrester Wave™: Public Cloud Development And Infrastructure Platforms, North America, Q1 2020," Forrester Research, Inc., March 16, 2020.

- › Partner ecosystem: Compared to others in the evaluation has among the most partners providing development tools, admin and management tools, application services, and ISV/SaaS products.
- › Marketplace and community: Has a marketplace with integrated commercial terms for thousands of partner products.

³ Source: Forrester Analytics Business Technographics Priorities And Journey COVID-19 Recontact, 2020 (April 29 - May 22).

Disclosures

The reader should be aware of the following:

- › The study is commissioned by Microsoft and delivered by Forrester Consulting. It is not meant to be a competitive analysis.
- › Forrester makes no assumptions as to the potential benefits that other organizations will receive. Forrester strongly advises that readers use their own estimates within the framework provided in the report to determine the appropriateness of an investment in the Microsoft partner program.
- › Microsoft reviewed and provided feedback to Forrester. Forrester maintains editorial control over the study and its findings and does not accept changes to the study that contradict Forrester's findings or obscure the meaning.
- › Microsoft provided the partner names for the interviews.

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ABOUT TEI

Total Economic Impact™ (TEI) is a methodology developed by Forrester Research that enhances a company's technology decision-making processes and assists vendors in communicating the value proposition of their products and services to clients. The TEI methodology helps companies demonstrate, justify, and realize the tangible value of IT initiatives to both senior management and other key business stakeholders. The TEI methodology consists of four components to evaluate investment value: benefits, costs, risks, and flexibility. <https://go.forrester.com/consulting/content-marketing-consulting/>

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