Market Overview: Google Apps Implementation Partner Ecosystem

by TJ Keitt, January 8, 2014

KEY TAKEAWAYS

**Google’s Implementation Partners Aren’t Traditional Enterprise Partners**
While some Google Apps implementers are systems integrators, many of Google’s successful partners are small, nimble cloud consultancies. These service providers focus on Google and other cloud services, eschewing any on-premises specialization. These players have great technical expertise, as many are legacy IBM and Microsoft partners.

**CIOs Should Judge These Service Providers On Eight Capabilities**
Google’s partner program provides categorizations and certifications that CIOs can use to judge partners. But CIOs should focus on the partners’ skills in cloud feasibility assessments, migrations and deployment, app dev and integration, customer tech support, change management, Google expertise, cloud brokering, and cloud strategy planning.

**These Partners Stand Out On How They Help Businesses Accept The Cloud**
Google’s implementation partners want to expand their client relationships by helping clients use the cloud to achieve a competitive advantage. These service providers’ differentiation will come in areas that help clients accept and use an expanding set of cloud services and create strategies to incorporate them into business processes.
Market Overview: Google Apps Implementation Partner Ecosystem

Google’s Nimble, Cloud-First Partners Usher Clients Into Deeper Engagement With Google’s Enterprise Offerings

by TJ Keitt

with Khalid Kark and Kelsey Murphy

WHY READ THIS REPORT

As enterprises implement Google Apps for Business, CIOs need assistance leading their organizations on the journey into the world of cloud services and cloud-supported devices. Google built a vibrant professional services ecosystem over the past six years to meet this demand. So who are these players? And what capabilities do they have to help a CIO take full advantage of Google Apps and, by extension, the opportunities the cloud brings? This report provides IT leaders with an overview of the Google Apps implementation partner ecosystem, laying out the prominent players and their key capabilities. CIOs can use this information to begin their search for a partner to help them deploy and use Google Apps.

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Forrester interviewed 10 Google Apps implementation partners and more than nine user companies. This report also uses data from Forrsights Software Survey, Q4 2013; Forrsights Services Survey, Q3 2013; and Forrsights Services Survey, Q2 2012.

Related Research Documents

2016: Google Apps And Office 365
November 20, 2013

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April 16, 2013
GOOGLE’S PARTNER ECOSYSTEM IS DOMINATED BY CLOUD-FIRST NEWCOMERS

As more enterprises like Costco, the Roche Group, and Sealed Air become Google Apps clients, they need assistance moving often complicated on-premises collaboration infrastructures to Google’s standardized public cloud. Demand for these services has exploded, as we’ve seen double-digit jumps in the percentage of IT leaders hiring consultants to help plan and carry out cloud migrations (see Figure 1). Google has relied on a growing group of partners, in lieu of building a strong professional services organization, which is best characterized as:

- **Smaller, younger firms that have a great deal of technical expertise.** Cloud services don’t require a heavy on-site presence to deploy. This opened the door for small consultancies to form the professional services core for Google. While global systems integrators like Unisys have Google Apps practices, the bulk of very successful Google partners are firms like Tempus Nova with between 20 and several hundred employees. You shouldn’t confuse size with competence, though. Many of these firms have legacies building solutions with IBM and Microsoft technology.

- **Organizations that specialize in pure-cloud offerings.** Many of Google’s top partners eschew offering any services to help clients implement or maintain traditional on-premises technology. Instead, they’ve created practices that focus on Google Enterprise, Google’s business technology portfolio that includes Google App Engine and Google Compute Engine. Some Google partners, like Cloud Sherpas, are cloud brokers, meaning they handle the billing, provisioning, and management of other SaaS offerings like salesforce.com and ServiceNow for enterprise IT.1

- **Customer support specialists who own the client’s relationship with Google.** Google relies on a reseller model to deliver the Apps portfolio to clients. This means its partners handle the migration, implementation, billing, and ongoing support for many of Google’s enterprise clients. Google supports this model by certifying partners’ capabilities around sales, deployment, and customer support. In particular, Google singles out certain partners, like Appirio, to participate in its client support program.
Google Structures Its Ecosystem With Certifications And Exclusive Programs

The early Apps implementation partners approached Google to fill gaps in the vendor’s own professional services capabilities. As the partner program has matured under Director of Enterprise Operations Alex Diacre, Google has built classifications and certifications to validate its partners’ capabilities (see Figure 2). These programs are still developing as Google Enterprise’s offerings grow and Google expands its partner ecosystem to serve new geographies, such as northern Europe. You will find that Google’s classifications and certifications will help:

- **Identify partners that have mature practices.** Google splits its Apps partners into four groups: premier enterprise resellers, authorized enterprise resellers, premier small and medium-size business (SMB) resellers, and authorized SMB resellers. Google’s enterprise program (serving companies with over 250 employees) is composed of partners that Google selects. Premier-level partners have achieved consistent success and have invested in Google certifications and marketing programs. Other Google Enterprise offerings also break down resellers into premier and authorized groups.

- **Find specific sales and deployment skills across Google Enterprise.** Google certifies sales professionals and deployment specialists for its offerings. It also has a special invitation-only partner program called the Google Cloud Transformation Partner program. This program taps partners to build cloud apps, predictive analytics tools, and storage solutions using Google technologies.
■ **Locate partners that can provide robust customer support.** Google’s invitation-only Customer Success Services Program is composed of the partners that Google says can provide high-touch service for large customers. These partners provide ongoing break/fix support and advisory services to help customers better integrate Google Enterprise technologies into their businesses. The partners are able to provide these services because they have access to Google’s product road maps and the tools from Google needed to deliver this service.

*Figure 2 Google’s Classifications And Certifications Are The Keys To Unlocking Its Partner Network*
CIOs should evaluate these providers on eight capabilities

At a high level, Google's implementation partners have a similar set of offerings to address the basic requirements of an Apps implementation. What really distinguishes each service provider, though, is how it helps a client navigate the journey to the cloud (see Figure 3).

**Figure 3 Google Implementation Partners Guide CIOs’ Cloud Journey**
Providers Must Excel In Four Core Areas To Be Considered As A Partner

As you consider a partner, the first thing you must understand is how well the service provider constructs and carries out the migration to Google Apps. This breaks down into four basic capabilities:

- **Cloud feasibility assessments.** Google Apps presents a radical technology change for IT leaders. Superlative implementation partners help CIOs determine if this change is too drastic from technology, process, and culture perspectives. For example, Unisys provides clients a cloud readiness assessment and conducts day-in-the-life workshops to demonstrate the effect moving to Google can have on the business. These services show a partner’s knowledge of issues related to moving to Google and its ability to find solutions.

- **Migration and deployment services.** The value that partners bring is their skill in analyzing a client’s current environment and developing a road map to mitigate issues like data retention and archiving. Partners stand out for having talented staff and proprietary technology to address complex issues, like security, and streamline the migration and deployment processes. For example, Tempus Nova has a proprietary coexistence tool that allows Notes apps to run alongside the Apps environment during the migration.

- **Application development and system integration.** Google’s partners can provide value by helping IT leaders reproduce custom business apps in environments like Google App Engine. Partners stand out for their ability to perpetuate critical, and often complicated, systems integrations in Google’s environment. For example, Sada Systems uses App Engine to build bespoke identity management and message filtering tools in the environment.

- **Customer technical support.** Google leans on its partners to provide tier one support, so partners with the infrastructure to provide 24x7 support are essential. Beyond basic break/fix support, more sophisticated partners have proprietary management consoles for Apps to give clients greater control over the Google environment. For example, Onix Networking provides four support service tiers and an outsourced administration offering for Apps.

Partners Distinguish Themselves With Their Competency In Four Value-Added Areas

Once enterprises roll out Google Apps, we find that IT leaders seek areas to optimize their use of Google technology as well as evaluate what other value there is for their businesses in the cloud. These are areas where they often again turn to their Google Apps implementation partners for assistance. As you plan, also consider your prospective partner’s capabilities in these four areas:

1. **Change management consulting.** Using Gmail in a business environment can represent a massive change, even for those who have personal accounts. Partners distinguish themselves by applying their knowledge of the client’s culture and operations to creating messaging and training that highlights the benefits of Apps within the context of the client’s business. For
example, Dito’s change management program focuses on determining the issues that executives and security officers have in moving to Apps. This ensures that the business moves smoothly through the change life cycle.4

2. **Google Enterprise expertise.** Google’s business offerings extend to provide IT leaders search tools, cloud infrastructure, geospatial technology, and devices.5 Partners’ value here is helping clients acquire, deploy, manage, and use these Google tools to address business challenges like fleet management, enterprise search, and low-cost computing devices. For example, Promevo has carved out a business selling and managing Chromebooks in addition to Google Apps.

3. **Cloud brokering abilities.** As CIOs further explore cloud services, having partners who can simplify the contracting, implementation, and integration of other services into their business environments is invaluable. So Google’s partners that are certified partners and resellers of popular cloud applications and that can integrate those services with Google Apps stand out. For example, Cloud Sherpas provides adoption, management, and enhancement services that help clients build a portfolio of cloud apps around tools like Apps, salesforce.com, and ServiceNow.

4. **Cloud-based business strategy planning.** Increasingly, business leaders expect the cloud to help spur innovation and facilitate business agility.6 Forward-looking Google partners have built consulting services to help business leaders re-engineer processes, workflows, and business models around the flexibility the cloud provides. For example, Appirio created a set of services to address workforce transformation and user experience when moving to the cloud.

**PARTNERS DIFFERENTIATE ON HOW THEY HELP CLIENTS LEVERAGE THE CLOUD**

Google’s implementation partners aren’t interested in simply deploying the technology. They want to build long-lasting relationships with their clients, helping them grow in the cloud. This means the prominent members of this ecosystem have expanded their offerings into more consultative areas to help executives integrate cloud services into their business (see Figure 4). Forrester interviewed Google’s premier enterprise resellers to understand CIOs’ options among Google’s mature partners and to see how this market is evolving. These firms are developing their businesses as follows:

- **Agosto helps CIOs migrate to cloud-powered devices and infrastructure.** Agosto’s offerings are geared toward North American midsized enterprises. To help these clients embrace Google Apps, Agosto has built change management teams. The extended value of the business, though, lies in helping CIOs use the extended Google cloud platform — including Compute Engine and App Engine — to develop new apps and services. Agosto buttresses this with a steadily growing Chromebooks business, allowing clients to use the cloud to support mobile workers in verticals like construction that need easily replaceable equipment.
Appirio focuses on creating a cloud experience for employees. Appirio targets organizations interested in creating agile businesses that have engaging, productive employee experiences. The firm employs 800 cloud-focused consultants who, supported by Appirio’s combined TopCoder and CloudSpokes freelance development and design communities, weave the cloud into its clients’ business and technical infrastructures. This is the bedrock for strategies to use the cloud to spur behavior changes that improve processes. Appirio can also help Apps clients move into and integrate other clouds like salesforce.com and Workday.

Capgemini’s consulting practice drives business change through cloud tech. Capgemini’s cloud innovation practice — which delivers Google Apps — focuses on clients looking to make a large transformation in the cloud. The core is its adoption-centered experience methodology that emphasizes change management and addressing employee needs. Part of this program is encouraging clients to use the extended Google portfolio to replicate processes. For example, Capgemini created a Chrome gadget to handle one client’s legacy document validation process.

Cloud Sherpas facilitates multicloud environments for IT leaders. Cloud Sherpas works with clients that need to build, implement, and manage multiple cloud services. In addition to Google Apps, Cloud Sherpas also acts as a cloud broker for salesforce.com, ServiceNow, and several other cloud services. An outgrowth of being a broker is it can integrate these disparate services for clients interested in building new business processes in the cloud. The firm has also built an extensive change management practice to ensure that its clients’ employees accept the cloud.

Dito extends the Google Enterprise experience with proprietary apps. Dito specializes in North American enterprises interested in the Google Enterprise portfolio. In addition to its Apps offering, the firm has a comprehensive Chromebooks practice, helping companies deploy them, train workers, and support the devices. Dito also has offerings around Google’s geospatial, App Engine, and Google Plus for business offerings. Dito augments clients’ Apps implementations with an open source management tool, as well as apps such as its zipped-file extractor, that extend Google services like Drive.

Onix Networking focuses on change management to help clients accept the cloud. Onix has a strong track record with US government agencies and private sector firms. To help these clients move to Google’s cloud, Onix has an Apps trainer bench and has developed proprietary tools to guide the change management process. It can also develop custom applications on third-party cloud platforms, like Fujitsu’s app builder RunMyProcess, to augment and help manage Apps. Onix also has award-winning practices for Google’s search and geospatial products.

Promevo provides tools to clients to manage Google Enterprise offerings. Promevo’s large clients are multinationals based in the American Midwest and universities. To help these clients run their Apps implementations, Promevo developed the gPanel administration console. And it created gMigrate to help companies consolidate multiple Apps domains. The firm also has
a large Chromebooks business, selling mostly into the education market. Promevo’s gScholar provides asset management for Chromebooks as well as teacher-student interaction tools.

- **Sada Systems helps clients use Google Enterprise to revitalize workflows.** Sada works mostly with midsized enterprises, state and local governments, and educational institutions. To help these organizations transform their businesses, Sada helps clients use Google search to locate information more quickly. And it provides geospatial products to allow clients to incorporate maps and geographic visualizations within line-of-business applications. Sada also has an App Engine business to help clients build adjuncts to Apps, like intranets, and a Compute Engine business to help CIOs minimize on-premises data center infrastructure.

- **Tempus Nova uses its developer expertise to extend clients’ cloud experience.** Tempus Nova targets large enterprises with complex environments. The firm’s software development legacy helped it build a proprietary workflow engine and development library in App Engine. And its stable of Java and Python developers has the skills to help clients integrate on-premises applications with Google’s cloud. Tempus Nova recently expanded its Google Enterprise offerings to include Google’s geospatial products.

- **Unisys integrates legacy environments into Apps to make them palatable to CIOs.** Unisys focuses on US government agencies with some private sector clients. It has a robust change management program to ease the move into Apps. However, it differentiates on complex integrations such as creating a unified messaging solution in Apps. Unisys can layer security solutions, like ZL Technologies records retention tools, on Apps. The integrator also helps its clients use other Google Enterprise products, such as the search appliance and the geospatial offerings.
### Figure 4 Google’s Partners Have A Varied Set Of Capabilities

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<th>Description</th>
<th>Change management</th>
<th>Google Enterprise expertise</th>
<th>Cloud brokerage</th>
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- **Agosto**: Agosto invested in abilities to directly train employees and trainers. They also provide services for the entire Google Enterprise portfolio.
- **Appirio**: Appirio’s strength is in its cloud strategy consulting as well as its ability to act as a broker for multiple cloud services. Their Google Enterprise offerings focus mainly on the platform and not the appliances and devices.
- **Capgemini**: Capgemini’s cloud innovation practice provides business transformation services that help alter business processes and take advantage of the cloud’s benefits.
- **Cloud Sherpas**: Cloud Sherpas has invested in helping clients manage, adopt, and use Google and other cloud services. So, they have robust change management and cloud brokering capabilities.
- **Dito**: Dito’s focus is on getting clients up and running on Google products. Their big investments are in change management and app development on Google’s platform.
- **Onix Networking**: Onix emphasizes robust change management through planning and training of employees. As a long-standing Google partner, they also provide services around most of the Google Enterprise offerings.
- **Promevo**: Promevo’s specialty is augmenting Google Enterprise offerings. They focus on change management and demonstrate their Google expertise through custom application development on the Google platform.

**Source**: Forrester Research, Inc.
**Figure 4** Google’s Partners Have A Varied Set Of Capabilities (Cont.)

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<tr>
<td><strong>Sada Systems</strong> Sada’s legacy as an app developer helped it develop expertise around App Engine and Compute Engine. It’s also building its geospatial and Chromebooks business.</td>
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<td><strong>Tempus Nova</strong> Tempus Nova’s app development history has led to it being an expert at building apps on App Engine. Their change management focuses on business process re-engineering based on Google’s capabilities.</td>
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<td><strong>Unisys</strong> Unisys’ integration skills allow it to tie a number of systems into Google Apps. It also brings to bear a robust training and communication program to facilitate change management.</td>
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Source: Forrester Research, Inc.

RECOMMENDATIONS

**PLAN ON NEEDING ADDITIONAL SERVICES POST-DEPLOYMENT**

Many Google implementation partners told Forrester that there can be a lag of six months to a year between the initial deployment and follow-on consulting and development projects. So, your evaluation of partners should anticipate the services that your business will need once it is comfortably using the Google portfolio. Making this determination requires you to understand the expectations business leaders have going into a Google Apps rollout — or will have after they’re exposed to the technology. To obtain this knowledge, Forrester recommends that you do the following:

- **Map the productivity challenges Google addresses to anticipate consulting needs.** If business leaders see Google Apps as inexpensive email, IT will have to provide a broader vision until executives can use the technology and see the value. In many organizations, though, business leaders will see Apps as a way to facilitate new working styles and speed up collaboration. In either case, your conversation with executives should center on challenges in the business related to work styles, collaboration, and knowledge management. This will lay the foundation for the change management and integration services you’ll need and hint at business strategy services that may be necessary.
- **Determine if other business apps can go to the cloud to suss out the need for a cloud broker.**
  Use this migration to start a conversation with business leaders about other nondifferentiating technologies that could reside in the cloud. For example, you may be able to move help desk management to a service like ServiceNow. This conversation — which includes business and IT leaders — should also lay out the service levels you require for these applications and any security, privacy, and compliance concerns. These points will show you the back-end integrations you’ll need as well as any unified billing and service management that your organization requires.

- **Assess others’ success “going Google” to plan broader use of Google technology.**
  Companies in your industry that have already deployed Google technology will show how these tools can affect your organization. They will also show any competitive advantages other firms already have in going in this direction. You should use Google’s public case studies — found on the Google Apps website and the Google Enterprise blog — and customer references to gather this information. Use the conversations to identify creative ways to use the Google Enterprise portfolio and to verify the abilities of implementation services providers to deliver these transformational use cases.

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**SUPPLEMENTAL MATERIAL**

**Methodology**

Forrester’s Forrsights Software Survey, Q4 2013, was fielded to 2,074 IT executives and technology decision-makers located in Canada, France, Germany, the UK, and the US from SMB and enterprise companies with two or more employees. This survey is part of Forrester’s Forrsights for Business Technology and was fielded during October 2013 and November 2013. ResearchNow fielded this survey online on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates. We have provided exact sample sizes in this report on a question-by-question basis.

Forrester’s Forrsights Services Survey, Q3 2013, was fielded to 1,050 IT executives and technology decision-makers located in Canada, France, Germany, the UK, and the US from enterprise companies with 1,000 or more employees. This survey is part of Forrester’s Forrsights for Business Technology and was fielded during August 2013 and September 2013. ResearchNow fielded this survey online on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates. We have provided exact sample sizes in this report on a question-by-question basis.

Forrester’s Forrsights Services Survey, Q2 2012, was fielded to 1,058 IT executives and technology decision-makers located in Canada, France, Germany, the UK, and the US from enterprise companies with 1,000 or more employees. This survey is part of Forrester’s Forrsights for Business Technology and was fielded during May and June 2012. LinkedIn Research Network fielded this
survey online on behalf of Forrester. Survey respondent incentives include gift certificates and research reports. We have provided exact sample sizes in this report on a question-by-question basis.

Each calendar year, Forrester’s Forrsights for Business Technology fields business-to-business technology studies in more than 17 countries spanning North America, Latin America, Europe, and developed and emerging Asia. For quality control, we carefully screen respondents according to job title and function. Forrester’s Forrsights for Business Technology ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of IT products and services. Additionally, we set quotas for company size (number of employees) and industry as a means of controlling the data distribution and establishing alignment with IT spend calculated by Forrester analysts. Forrsights uses only superior data sources and advanced data-cleaning techniques to ensure the highest data quality.

We have illustrated only a portion of survey results in this document. To inquire about receiving full data results for an additional fee, please contact Forrsights@forrester.com or your Forrester account manager.

**Companies Interviewed For This Report**

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**ENDNOTES**

1  Forrester refers to this model as a SaaS broker. This model offers the unified provisioning, billing, and contract management with multiple software-as-a-service (SaaS) offerings, including potentially the integration of services between the different SaaS providers. While a specific business application might be provisioned by a single SaaS provider, the surrounding business services and integration of all SaaS services into one hybrid user experience is the main value-add provided by the SaaS broker. Pooling subscription volumes will also enable some SaaS brokers to offer attractive discounts compared with a direct SaaS-subscription. See the June 14, 2012, “Cloud Brokers Become Change Agents” report.

2  Google has two certifications for Google Apps: certified sales specialist and certified deployment specialist. These are exam-based certifications. Source: Google Apps Certification Program (http://certification.googleapps.com/).

During any change management process, Forrester has identified four transitional phases: 1) holding on; 2) resisting; 3) exploring; 4) committing. Moving employees through these phases requires a business to plan and communicate change, establish and train “owners” of change, and demonstrate change by showing performance improvements. See the February 4, 2013, “Social Business And Collaboration Success Hinges On Effective Change Management” report.

The components of Google's enterprise offerings are Google Apps, geospatial products (e.g., Google Maps), Google App Engine, Google Compute Engine, Google Cloud Storage, Google BigQuery, Chrome browser, and Chromebooks.

Sixty-eight percent of IT software decision-makers say the cloud supports business innovation and another 75% say the cloud improves business agility. Source: Forrsights Software Survey, Q4 2013.

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A global research and advisory firm, Forrester inspires leaders, informs better decisions, and helps the world’s top companies turn the complexity of change into business advantage. Our research-based insight and objective advice enable IT professionals to lead more successfully within IT and extend their impact beyond the traditional IT organization. Tailored to your individual role, our resources allow you to focus on important business issues — margin, speed, growth — first, technology second.

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