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The Forrester Wave™: Integration-Centric Business Process Management Suites, Q4 2006

by Ken Vollmer and Henry Peyret

TECH CHOICES

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webMethods, TIBCO, And IBM Lead The Way

by **Ken Vollmer and Henry Peyret**

with Mike Gilpin, Megan Daniels, and Jacqueline Stone

EXECUTIVE SUMMARY

Forrester evaluated leading integration-centric business process management suite (IC-BPMS) vendors across 85 criteria and found that webMethods, TIBCO Software, and IBM have established category leadership based on their combined strength across the three major areas of evaluation: connection, business process management (BPM), and service-oriented architecture (SOA). webMethods excelled overall with the most comprehensive suite of IC-BPMS features. TIBCO scored well due to its high scores in the traditional integration arena and its advanced features for supporting human interactions, while IBM enhanced its high position in this space via its strong support for both BPM and SOA. Oracle retains its place in the Leader category due primarily to the enhanced BPM features that it has recently added, and Sun Microsystems captured a top spot through its acquisition of category-leading products from SeeBeyond Technologies. BEA Systems made a strong surge into the Leader category due to the many enhancements it has made in the areas of both BPM and SOA, and Software AG achieved a top place in the integration suite market for the first time due to its strong SOA features.

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NOTES & RESOURCES

Forrester conducted product evaluations in October and November 2006 and interviewed more than 35 vendor and user companies, including BEA Systems, Cordys, IBM, iWay Software, Magic Software Enterprises, Microsoft, Oracle, SAP, Software AG, Sun Microsystems, TIBCO Software, Vitria Technology, and webMethods.

Related Research Documents

["The Forrester Wave™: Human-Centric Business Process Management Suites, Q1 2006"](#)

February 24, 2006, Tech Choices

["Demand For Business Process Management Suites Will Accelerate Through 2009"](#)

January 26, 2006, Market Overview

["The Forrester Wave™: Integration Suites, Q3 2005"](#)

July 28, 2005, Tech Choices

TARGET AUDIENCE

Enterprise architecture professional, application development and program management professional, business process and applications professional

THIS IS NOT YOUR DAD'S EAI

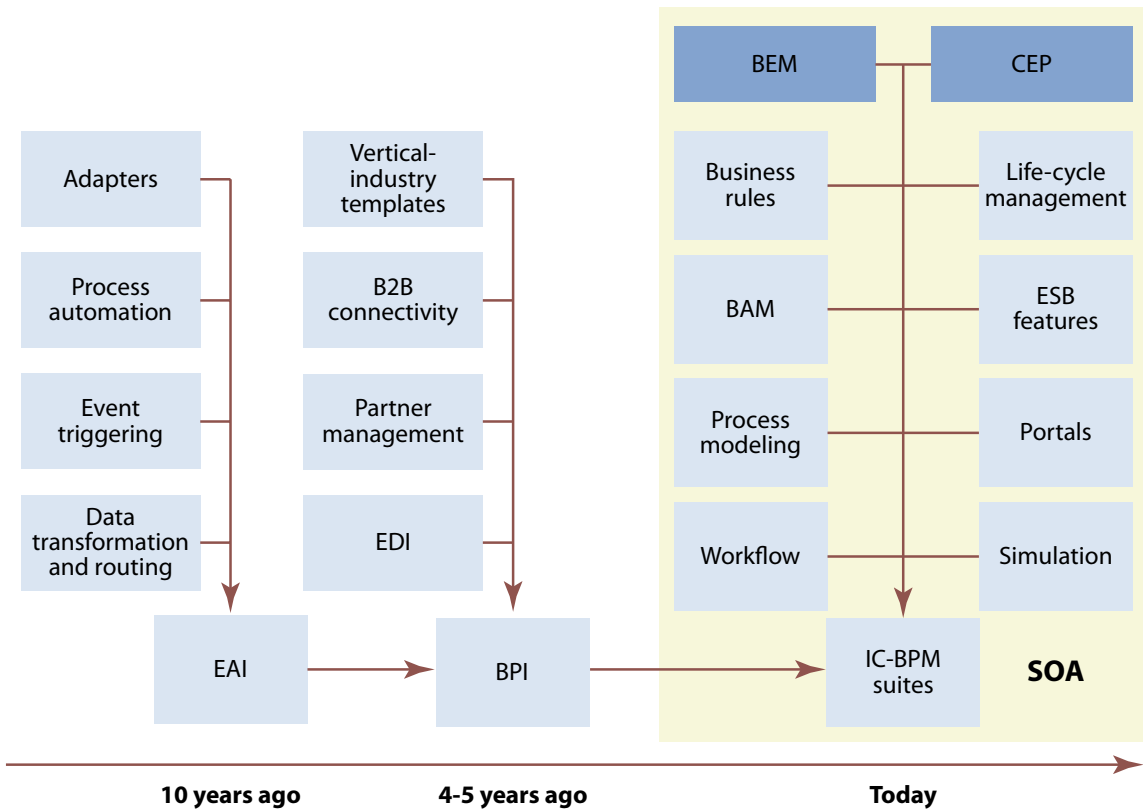
This market was previously reviewed under the category heading of “integration suite” but has been modified to “integration-centric business process management suite” (IC-BPMS) due to the many product enhancements made by the vendors in response to the increased level of organizational emphasis on process improvement efforts. IC-BPMS products have evolved primarily out of the enterprise application integration (EAI) space and continue to represent the leading edge in integration suite capabilities.¹

However, today's IC-BPMS products bear little resemblance to what was available in the past. Over the past five years, the Leaders in this category have transformed the market from one dominated by proprietary, closed-framework solutions to one that is now exclusively based on SOA and is more committed with every passing day to standards-based integration technology. Also, during the past two to three years, most of the vendors have added embedded enterprise service bus (ESB) and BPM capabilities to extend their functionality even further. The end result is that organizations can now obtain the most comprehensive, leading-edge integration products in pre-integrated suites that can significantly enhance organizational agility, while lowering implementation headaches and driving down ongoing maintenance costs when compared with earlier versions of proprietary integration technology (see Figure 1).²

And It's Not Just About Integration

The products in this category have lowered the barrier between integration and new application development — particularly, the development of composite applications that extend the mindset of the organization to complete, cross-functional business processes. IC-BPMS tools are uniquely capable of supporting model-driven, composite application development based on existing or captured business metadata stored in embedded, SOA-based registry/repositories. This approach supports high levels of system artifact reuse and can frequently result in dramatically reduced coding for new application functionality. Composite applications can be modified by simply applying changes to the process model or by invoking different business rules, which results in modified behavior without coding, thereby enabling a much faster IT response to changing business priorities. IC-BPMS products also support the process execution, monitoring, and optimization phases of the process life cycle (see Figure 2). Thus, they constitute one of the major product categories to help customers develop their own custom composite applications.

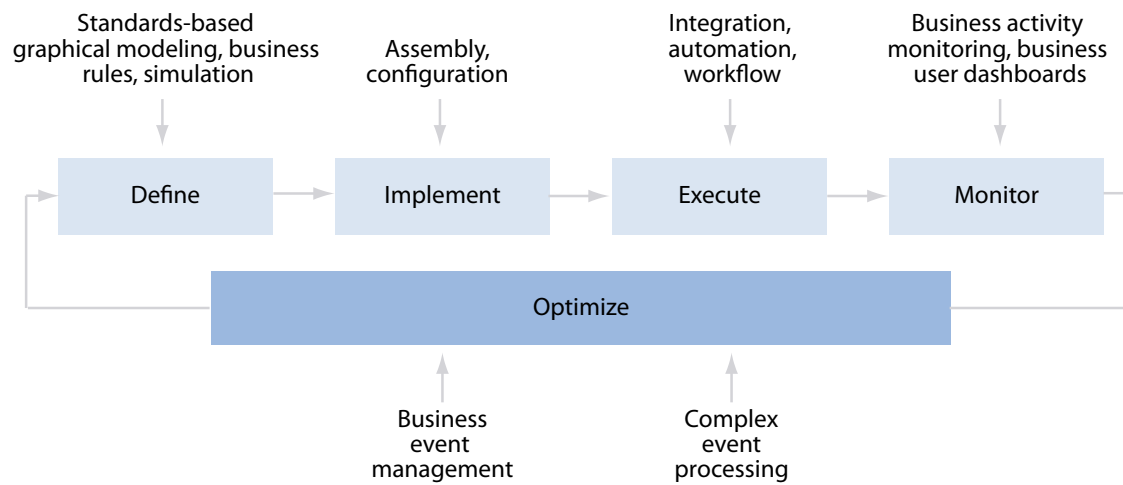
Figure 1 The Evolution Of IC-BPMsEs



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Source: Forrester Research, Inc.

Figure 2 IC-BPMS Tools Affect The Entire Process Life Cycle



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Source: Forrester Research, Inc.

The Fractured BPMS Tool Market

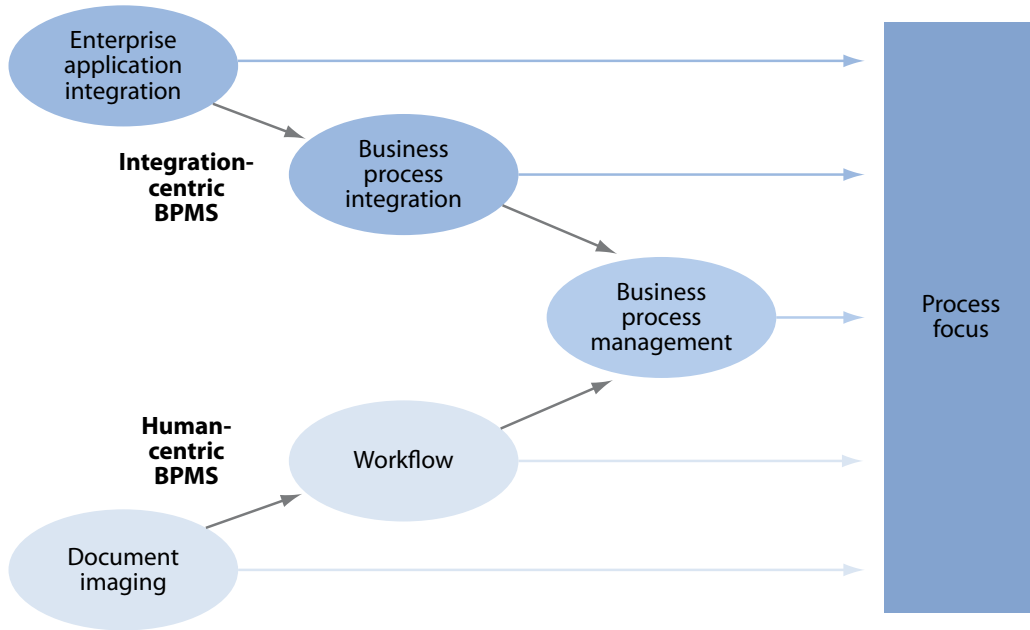
IC-BPMS products represent approximately half of the total BPM software market, with the other half coming from the smaller but more numerous human-centric business process management suite (HC-BPMS) vendors.³ HC-BPMS products originated in the workflow and document imaging technologies of the previous decade and have evolved into BPM suites that are particularly well suited for use with efforts involving extensive interaction between human beings.⁴ These two different types of solutions still reflect their heritage in their balance of strengths and weaknesses, but the end result for both is a process focus (see Figure 3).

The Market Continues To Evolve

As with any market that is experiencing a high level of demand, there are several forces at work that will continue to bend and shape the market of the future. The most significant of these will be:

- **The increasing business focus on process improvements.** Numerous surveys highlight the increasing importance of process improvements across all sectors. This will continue to drive the high level of demand for BPMS products to support these efforts (see Figure 4).⁵
- **Market consolidation.** In spite of the high overall demand, the available revenue will become increasingly concentrated through fewer and fewer vendors as customers focus on those that are truly the best at supporting process improvements. This will lead to many of the smaller vendors cashing out via acquisition, while others will either be forced to change their focus or will simply go out of business. There are too many small vendors with average technology for all of them to survive. This is especially true in the HC-BPMS arena, where the vendors are considerably smaller than the average IC-BPMS provider.
- **The impact of standalone ESB providers.** Most of the IC-BPMS providers have all of the key ESB features already embedded in their product.⁶ At the same time, many of the standalone ESB providers such as Cape Clear Software and IONA Technologies will continue to add features to their products, thereby eliminating some (and potentially many) of the differentiating features that IC-BPMS tools provide today.⁷ However, the IC-BPMS vendors are not standing still, and they will continue to maintain an overall lead from a features perspective over ESB vendors for the foreseeable future.
- **Linked BPM and SOA adoption.** There is a strong link between SOA and BPM. A recent panel survey conducted by Forrester showed that 92% of respondents who were implementing SOA also felt that BPM was important for their organization's future.⁸ This is important to note because the current generation of IC-BPMS products reside on an SOA foundation and are capable of fully supporting a full range of SOA functionality. Translation: You don't have to implement SOA before you implement BPM. They can be implemented simultaneously.

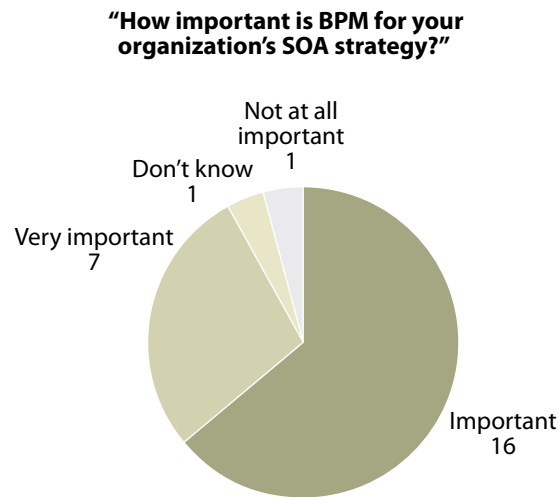
Figure 3 The Two Major BPMS Categories



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Source: Forrester Research, Inc.

Figure 4 BPM And SOA Are Inextricably Linked



Base: 25 business and IT decision-makers who have a SOA strategy

Source: September 2006 Forrester Research BPM panel survey

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Source: Forrester Research, Inc.

IC-BPMS EVALUATION OVERVIEW

To assess the state of the IC-BPMS market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top IC-BPMS vendors.

Looking To The Future Of BPM And SOA

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria (see Figure 5). We evaluated vendors against approximately 85 criteria, which we grouped into three high-level buckets:

- **Current offering.** We investigated the vendors' capabilities in the areas of connection, BPM, and SOA. The connection area included overall architecture, development environment, support for protocols and adapters, transformation features, and security. The BPM section looked at event management, industry accelerators, human-centric features, monitoring, partner management, process modeling, and business rules management. The SOA section included a review of ESB capability, governance, composite applications capability, registry/repository support, and support for Web services.
- **Strategy.** We evaluated this section on the basis of vendor vision and product road map features, as well as solution cost and strategic alliances.
- **Market presence.** The results in this section are based on a review of the vendors' installed customer base, new customers in the past quarter and year, and the level of global sales and implementation support.

Traditional Platform Vendors Compete Head-To-Head With Integration Specialists

Forrester included 13 vendors in the assessment: BEA Systems, Cordys, IBM, iWay Software, Magic Software Enterprises, Microsoft, Oracle, SAP, Software AG, Sun Microsystems, TIBCO Software, Vitria Technology, and webMethods. Each of these vendors has:

- **Comprehensive SOA capability.** This is provided either as a standalone ESB product (as is the case for BEA, iWay, IBM, Software AG, and Sun Microsystems) or as an embedded ESB capability (as is the case for Cordys, Magic Software, Microsoft, Oracle, SAP, TIBCO, Vitria, and webMethods).
- **Strong integration features.** This equates to the functionality traditionally provided by EAI and B2B integration vendors.
- **Significant support for human interactions.** This includes features for supporting human interactions with applications systems as needed. These would not be as extensive as support provided by human-centric BPM products, but they would still cover a significant level of human interaction features.

Figure 5 Evaluation Criteria

CURRENT OFFERING	
Connection	How strong is the vendor in the areas of architecture, development, protocols, transformation, and security?
Business process management	How sophisticated is the vendor's business process management capability?
SOA	What features does the vendor support relative to service-oriented architecture (SOA)?
STRATEGY	
Product strategy and vision	How strong is the vendor's product strategy and vision?
Solution cost	What is the relative cost of the solution?
Strategic alliances	How strong are the vendor's strategic alliances?
MARKET PRESENCE	
Installed base	How large is the vendor's installed base of customers for this product and all products?
New customers	How many customers are buying or upgrading any version of the product?
Delivery footprint	What is the vendor's method of delivery?

Source: Forrester Research, Inc.

LEADING VENDORS KEEP UP WITH ADVANCING REQUIREMENTS

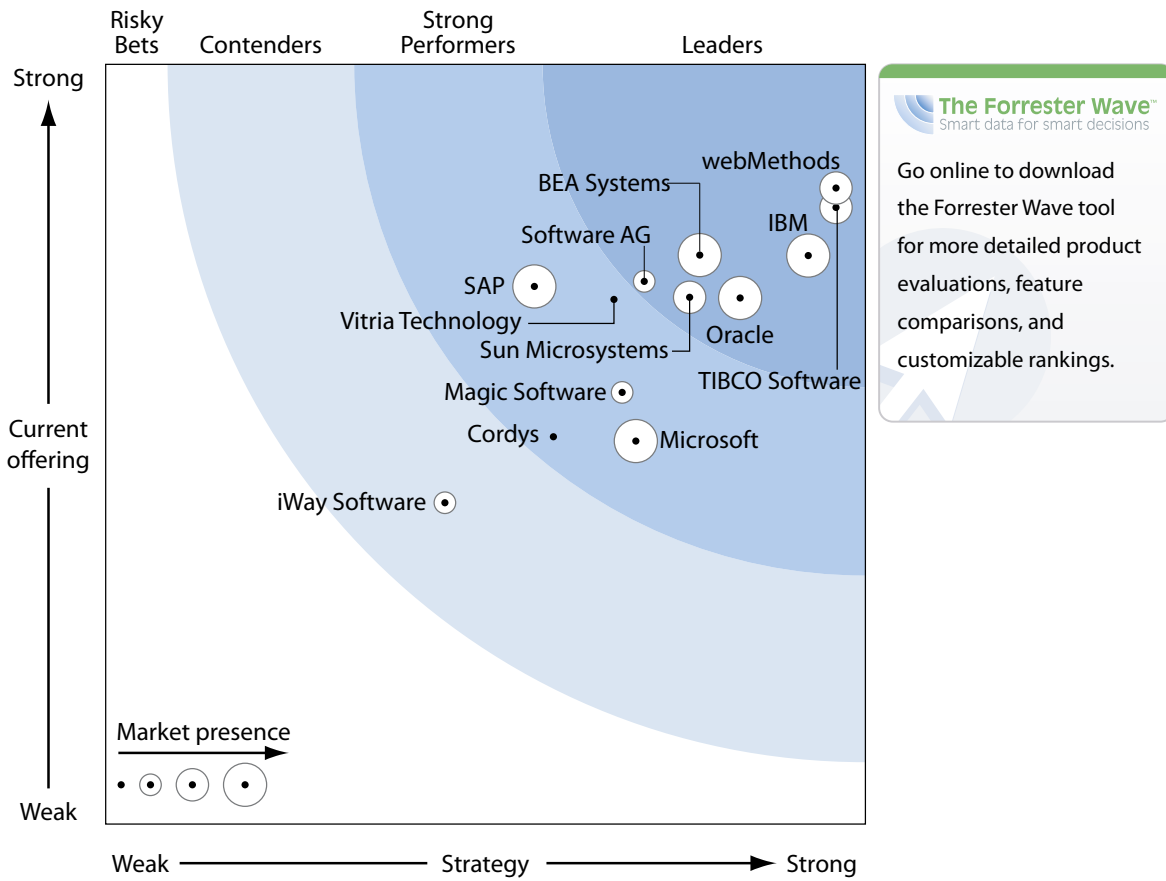
The evaluation uncovered a market in which (see Figure 6):

- **webMethods, TIBCO, IBM, Oracle, Sun, BEA Systems, and Software AG lead the pack.** In general, the vendors that scored highly on the previous integration suite evaluation also scored highly in this evaluation, even though the level of required functionality increased significantly. This indicates that the vendors are aggressively pursuing the new BPM and SOA capabilities that organizations are seeking.
- **SAP, Vitria, Magic, Microsoft, and Cordys offer competitive options for special situations.** All of these strong performing vendors have adopted slightly different approaches to the market and are achieving varying levels of success.
- **iWay is a Contender.** The vendor provides strong SOA features but is lacking in the area of BPM support, thus limiting its applicability to scenarios requiring both SOA and BPM features, unless other BPM specific vendors are involved, as well. This was the first time that iWay was

included in an integration-related Forrester Wave™ evaluation, and these results clearly indicate that it is a capable ESB product and will be included in that category of evaluations going forward.

This evaluation of the IC-BPMS market is intended to be a starting point only. Readers are encouraged to view detailed product evaluations and adapt the criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

Figure 6 Forrester Wave™: Integration-Centric Business Process Management Suites, Q4 '06



Source: Forrester Research, Inc.

Figure 6 Forrester Wave™: Integration-Centric Business Process Management Suites, Q4 '06 (Cont.)

	Forrester's Weighting	BEA Systems	Cordys	IBM	iWay Software	Magic Software	Microsoft	Oracle	SAP	Software AG	Sun Microsystems	TIBCO Software	Vitria Technology	webMethods
CURRENT OFFERING	50%	3.74	2.53	3.75	2.11	2.84	2.53	3.46	3.55	3.58	3.46	4.11	3.43	4.17
Connection	30%	3.70	3.47	3.82	3.10	3.50	3.80	3.72	3.46	3.88	3.66	3.82	3.81	3.94
Business process management	40%	3.51	2.14	3.45	1.29	2.38	1.99	3.17	3.51	2.82	3.15	4.19	3.72	4.27
SOA	30%	4.08	2.10	4.08	2.20	2.80	1.98	3.60	3.68	4.28	3.68	4.28	2.68	4.28
STRATEGY	50%	3.91	2.94	4.60	2.24	3.40	3.50	4.17	2.82	3.55	3.84	4.80	3.34	4.80
Product strategy and vision	60%	4.60	4.00	5.00	1.70	3.00	3.00	4.20	1.90	3.20	3.60	5.00	3.60	5.00
Solution costs	20%	2.25	1.50	3.00	4.00	4.50	5.00	3.25	4.00	3.75	4.00	4.00	1.50	4.00
Strategic alliances	20%	3.50	1.20	5.00	2.10	3.50	3.50	5.00	4.40	4.40	4.40	5.00	4.40	5.00
MARKET PRESENCE	0%	5.00	0.53	5.00	2.59	2.35	5.00	5.00	4.69	2.90	4.00	3.53	2.00	3.25
Installed base	35%	5.00	1.50	5.00	4.40	2.70	5.00	5.00	4.10	2.70	5.00	3.50	2.70	5.00
New customers	35%	5.00	0.00	5.00	3.00	4.00	5.00	5.00	5.00	3.00	3.00	4.00	3.00	3.00
Delivery footprint	30%	5.00	0.00	5.00	0.00	0.00	5.00	5.00	5.00	3.00	4.00	3.00	0.00	1.50

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

Source: Forrester Research, Inc.

VENDOR PROFILES

Leaders: The Magnificent Seven All Provide Strong BPM And SOA Features

- **webMethods.** One of the leading vendors in early service-orientation solutions, webMethods has augmented its traditional integration capability with extensive BPM capability, as well, resulting in the most comprehensive IC-BPMS in the market. Although it is the smallest vendor in the Leader category in terms of revenue, webMethods has been a provider of leading-edge solutions for several years.⁹
- **TIBCO Software.** Another top vendor in the integration sector, TIBCO has the most advanced BPM features overall, covering both integration-centric and human-centric (acquired primarily via the acquisition of Staffware in May 2004) features. TIBCO is also pursuing leading-edge SOA-related features that will be available in the next release of its products.¹⁰
- **IBM.** Also one of the Leaders in the previous evaluation, IBM implemented significant BPM and SOA enhancements during the past 12 months that allowed it to move up in the overall rankings in this evaluation. IBM also offers several features to assist clients with their BPM and SOA implementation projects, including libraries of horizontal- and vertical-industry process templates and collections of commonly required service definitions covering more than a dozen sectors.¹¹

- **Oracle.** Another of the integration software Leaders from our last report, Oracle has taken steps to augment its strong integration solutions with BPM capability via a partnership with IDS Scheer, and it has also implemented many other SOA features to bring itself even closer to the integration specialists in the expanded IC-BPMS market.¹²
- **BEA Systems.** Listed as a Strong Performer in our last evaluation of the integration suite space due to limitations related to process improvements, BEA dealt with most of those concerns via its acquisition of Fuego (a HC-BPMS vendor) earlier in 2006. The vendor has also implemented key new features in its SOA product line. The combination of these two factors has moved BEA solidly into the Leader category for the IC-BPMS evaluation and also closer to the integration specialist Leaders.¹³
- **Sun Microsystems.** This is the first time that Sun has appeared in an evaluation of this category. In summer 2005, Sun acquired SeeBeyond Technologies and its related, J2EE-based integration technology. The SeeBeyond solution was rated as a Leader in the last evaluation, and this technology is giving Sun a jump-start into the integration software arena.¹⁴
- **Software AG.** This firm is another first-timer in our evaluations of this market, with a new product anchored by its advanced registry/repository component called CentraSite, which was co-developed with Fujitsu. This component is the core technology that drives many other pieces of functionality in its IC-BPMS product.¹⁵

Strong Performers: Five Vendors Provide Good Functionality For Specific Scenarios

- **SAP.** SAP NetWeaver provides strong integration, BPM, and service-oriented features for its base of customers, but while the vendor provides direct support for RosettaNet transactions out of the box, it does not provide similar capability for the much more widely used EDI transactions and requires customers to purchase an OEMed third-party product for this requirement. SAP has augmented its BPM modeling capability via an OEM relationship with IDS Scheer.¹⁶
- **Vitria Technology.** One of the smaller vendors in this space, Vitria has found that it needs to focus its marketing and sales efforts on a small number of vertical sectors such as telco and healthcare. However, it does have clients in many other sectors, as well, and provides good alternatives for many integration and BPM situations.¹⁷
- **Magic Software.** A midmarket focus is key to the success that Magic Software has achieved. It has garnered a lucrative partnership with SAP to connect its Business One customers to the core SAP applications, and it also gained considerable traction in providing integration solutions for the midrange IBM market.¹⁸

- **Microsoft.** Microsoft has adopted a different approach to the IC-BPMS space by relying on third-party companies to provide customers with a significant portion of the BPM features that they might need. However, the vendor's BizTalk Server product provides significant integration and B2B capabilities in its own right and is a viable alternative for a very large number of its customers.¹⁹
- **Cordys.** Another of the smaller vendors, Cordys has a broad suite of integration, BPM, and SOA features built into its products, and it is also developing a software-as-a-service (SaaS) alternative. One of the more recent entries into the market, Cordys has not been encumbered by a lot of legacy technology and has been able to build its solution on the latest wave of technology.²⁰

Contenders: iWay Focuses On SOA

- **iWay.** This vendor has a singular focus on the SOA space at the moment, and it provides a comprehensive set of features for that specific purpose. iWay provides only limited support for BPM and would not be a good choice for addressing those types of needs.²¹

SUPPLEMENTAL MATERIAL

Online Resource

The online version of Figure 6 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution:

- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.
- **Vendor strategy calls.** We asked each vendor to provide us with its vision for the future of the integration/BPM/SOA space, as well as details of how its product road map would reflect this vision.
- **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with two of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of product briefings, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and readers are encouraged to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve.

ENDNOTES

- ¹ Forrester's last evaluation referred to this space as integration suites. However, with the increasing focus on process improvement capabilities, we now refer to this space as integration-centric business process management suites. See the July 28, 2005, Tech Choices "[The Forrester Wave™: Integration Suites, Q3 2005](#)."
- ² BPMS products can support increased business agility. See the September 25, 2006, Trends "[Increase Business Agility With BPM Suites](#)."
- ³ Forrester predicts that the total BPMS market revenue will grow to about \$2.9 billion by 2009. At the moment, this revenue is equally split between the IC-BPMS and HC-BPMS components. See the January 26, 2006, Market Overview "[Demand For Business Process Management Suites Will Accelerate Through 2009](#)."
- ⁴ We recently completed another Forrester Wave report that looks at HC-BPMS providers. See the February 24, 2006, Tech Choices "[The Forrester Wave™: Human-Centric Business Process Management Suites, Q1 2006](#)."
- ⁵ *CIO Insight* recently compiled a study on the top trends for 2007 from the 13 surveys it conducted in 2006 of IT executives. Process improvement led the list of trends in the strategy category. Source: "The 30 Most Important IT Trends for 2007," *CIO Insight*, November 17, 2006 (<http://www.cioinsight.com/article2/0,1540,2060865,00.asp>).
- ⁶ Forrester reviewed the ESB capability of the IC-BPMS vendors in its first ESB evaluation. See the November 15, 2005, Tech Choices "[The Forrester Wave™: Enterprise Service Bus, Q4 2005](#)."
- ⁷ Standalone ESB products are placing upward pressure on the integration market. See the June 30, 2005, Tech Choices "[The Forrester Wave™: Enterprise Service Bus, Q2 2006](#)."
- ⁸ Source: Survey of 56 respondents taken at Forrester's Technology Leadership Forum 2006.
- ⁹ View the vendor summary for more detailed analysis on how webMethods fared in this evaluation. See the December 20, 2006, Tech Choices "[webMethods Captures The Lead In The IC-BPMS Market](#)."
- ¹⁰ View the vendor summary for more detailed analysis on how TIBCO Software fared in this evaluation. See the December 20, 2006, Tech Choices "[TIBCO Scores Well At The Top Of The IC-BPMS Market](#)."
- ¹¹ View the vendor summary for more detailed analysis on how IBM fared in this evaluation. See the December 20, 2006, Tech Choices "[IBM Strengthens Its Leadership Role In The IC-BPMS Market](#)."
- ¹² View the vendor summary for more detailed analysis on how Oracle fared in this evaluation. See the December 20, 2006, Tech Choices "[Oracle Maintains A Leading Role In The IC-BPMS Market](#)."
- ¹³ View the vendor summary for more detailed analysis on how BEA Systems fared in this evaluation. See the December 20, 2006, Tech Choices "[BEA Charges Into A Leadership Role In The IC-BPMS Market](#)."
- ¹⁴ View the vendor summary for more detailed analysis on how Sun Microsystems fared in this evaluation. See the December 20, 2006, Tech Choices "[Sun Microsystems Assumes A Leadership Role In The IC-BPMS Market](#)."

- ¹⁵ View the vendor summary for more detailed analysis on how Software AG fared in this evaluation. See the December 20, 2006, Tech Choices “[Software AG Becomes A Leader In The IC-BPMS Market.](#)”
- ¹⁶ View the vendor summary for more detailed analysis on how SAP fared in this evaluation. See the December 20, 2006, Tech Choices “[SAP NetWeaver Is A Strong Performer In The IC-BPMS Market.](#)”
- ¹⁷ View the vendor summary for more detailed analysis on how Vitria Technology fared in this evaluation. See the December 20, 2006, Tech Choices “[Vitria Leads The Strong Performers In The IC-BPMS Market.](#)”
- ¹⁸ View the vendor summary for more detailed analysis on how Magic Software fared in this evaluation. See the December 20, 2006, Tech Choices “[Magic Software Is A Strong Performer In The IC-BPMS Market.](#)”
- ¹⁹ View the vendor summary for more detailed analysis on how Microsoft fared in this evaluation. See the December 20, 2006, Tech Choices “[Microsoft Provides Strong IC-BPMS Support For Midmarket Integration.](#)”
- ²⁰ View the vendor summary for more detailed analysis on how Cordys fared in this evaluation. See the December 20, 2006, Tech Choices “[Cordys: An Up-And-Comer In The IC-BPMS Market.](#)”
- ²¹ View the vendor summary for more detailed analysis on how iWay Software fared in this evaluation. See the December 20, 2006, Tech Choices “[iWay Software’s IC-BPMS Provides Strong Support For SOA.](#)”

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