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BEST PRACTICES

Experiences Without Boundaries

How Governments and Agencies Are Blurring the Lines Between Experience Strategies With Total Experience Management



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EXECUTIVE SUMMARY

When talking about experiences and how they are created, iterated, orchestrated, and optimized across digital and offline channels, the conversation tends to center around platforms and technology first, with users, expectations, and outcomes second and a tertiary nod to strategy in the end. These expectations and outcomes that are driven by business and market demand are the most interesting, critical, and mandatory discussions as we shift thinking from how to deliver experiences across channels to how we deliver experiences across a customer, employee, constituent, and citizen's channel of choice and requirement. To fulfill enterprisewide strategies such as customer or employee experience, there must be a new best practice focused on the technology that underpins these strategies. In fact, an evolution of the very idea of experience management needs to happen.

This report explores the new opportunity for an evolved definition of total experience (TX) that more definitively connects key areas of engagement, strategy, and investment, including customer experience (CX) and employee experience (EX) strategies with multi-experience (MX) and user experience (UX) technologies. It differentiates between strategies and technology foundations needed to deliver on the opportunity of forging valued and durable relationships through experience. Finally, it showcases tangible examples of how simple expectations can be met today, heeding the call to action for more connected, holistic, and highly personalized experiences.

The reality is that some of the simplest experiences are the most complex to create and orchestrate—from how a government establishes digitized, self-service experiences to deliver on promises made to a diverse citizenry, to how global financial institutions deliver secure, self-service, multisurface experiences to amplify customer and shareholder value without sacrifice. In a fast-paced, complex digital-forward economy, the delivery of customer, employee, partner, or citizen experience requires total experience visibility, optimization, and management. These best practices, born from complexity, showcase how TX thinking can deliver more valued and valuable outcomes for all.

BUSINESS THEMES



Future of Work



Digital Marketing &
Sales Effectiveness



Matrix Commerce



Next-Generation
Customer Experience



Technology
Optimization

STRATEGY OR TECHNOLOGY: WHAT'S DRIVING EXPERIENCE?

For far too long, *customer experience* and *employee experience* have been misunderstood and misused terms that can refer to a strategy in one moment and a technology stack in another. Even the word *experience* has been overly simplified to describe a single transaction, a single element in onboarding for a new job, or the delivery of an individual marketing offer. The unfortunate byproduct of this lax articulation of experience is the creation of siloed and disconnected random acts of experience, stitched together by stacks that fail to connect to one another, let alone connect to the humans seeking out experiences.

Beyond the idea of “happy employees make happy customers,” business leaders are being told by their customers that this connection to human assistance is critical to their buying decisions and ongoing loyalty. In a recent PwC study, a clear majority of consumers (59%) believe that companies have lost touch with the human element of customer experience. Moreover, 82% want more human interaction in the future.¹

This demand for human interaction as a cornerstone to experience will have a direct impact on a customer's decision-making. Among all customers surveyed, 73% say that experience is an important factor when making purchasing decisions, ranking just behind price and product quality. When asked how companies were doing when it came to delivering the experiences customers wanted, 54% say CX needs improvement.²

Interestingly, numerous studies note that easy digital steps that amplify convenience and deliver real value are also critical to the delivery of exceptional employee experiences. In a study conducted by Flowtrace, an organizational diagnostics company, companies with successful onboarding processes could experience 1.9 times more profit compared with those companies that failed to focus on EX. In a Harvard Business Review study, organizations that prioritize EX saw, on average, revenue increases of more than 50%.³

Experience matters. Experience is also wonderfully profitable when delivered consistently for both employees and customers. To capitalize on this reality, executives are linking employee and customer experience initiatives and solutions, but struggle to integrate that required human touch in a new and exciting agentic world.

This demand for a human touch may come as a shock to the system for technology leaders focusing investments into artificial intelligence (AI) as a rudimentary tool to cut down on expenses and eliminate the more costly human-driven experiences. Instead of leveraging AI investments to heighten the value of all experiences, freeing up human employee time while also lowering operational costs, early use cases focused on cutting points of experience and replacing them with more complicated digital disruptions, accidentally leading to negative experiences and an easy exit for customer churn.

Experience delivery, moreover a robust holistic strategy empowered by easy-to-connect-and-deploy technology, is more critical than ever. So why are too many getting this wrong?

Defining Experience Strategies

Considering how critical experience is to success, it is worth taking a step back to establish some intentional language and definitions.

CX is an enterprisewide strategy that orchestrates an organization's delivery of engagements and experiences purpose-built to establish a durable, profitable relationship with a customer. This enterprisewide team sport has functional groups and centers of excellence that most often represent the front line of successful CX strategy deployments—such as sales (including pre- and post-sales, aftermarket, and customer success); service (including digital service desks and contact centers); commerce; and marketing.

EX, like CX, is an enterprisewide strategy but one that addresses the needs, expectations, preferences, and motivational drivers of employees with the specific intention of increasing productivity, job satisfaction, and employment longevity. Although the bulk of this strategy is developed, orchestrated, and managed in human resources or “people” teams, EX is inextricably

linked to the corporate culture that creates a meaningful bond and connection between the corporate vision and mission and each individual employee. EX is intertwined and often dependent on CX strategy, demanding that both be mapped, informed, developed, and orchestrated in unison from shared insight and intelligence pools.

Both CX and EX are based on the accumulation of reactions to the variety of engagements and interactions customers or employees have over time. Interestingly, when multiple studies about both CX and EX are analyzed in aggregate, the following notable similarities and trends emerge:

- Customers and employees highly rank convenience as critically important to their experiences. This convenience is always rooted in what is most convenient for the individual customer or employee, and rarely in terms of what is most convenient for the brand to deliver or provide.
- Value for both customers and employees can be categorized in very similar ways: things that save me time, things that save me or make me money, and things that add to my life. Without these attributes, an experience can quickly become a distraction—and distractions are easy to ignore.
- Nobody wants to do extra work for the sake of experience. Employees often complain about additional steps, toggling screens, working with a digital “swivel chair,” and extra “technological busy work.” Extra work rarely delivers extra value. Bad UX and bad journey design are churn accelerators.
- Being forced into action is never welcome. Customers and employees have a very clear view on the difference between following a trail of breadcrumbs versus being forced into a specific journey. Bad user interface (UI) where the machine is controlling the human is an invitation to experience abandonment.
- Nobody enjoys being fooled. This is especially true of interactions with AI. Users are willing and increasingly excited to use AI tools in work and home life to streamline and simplify, but AI interactions should be transparent and authentic, while also being seamless and ambient. Disruptive or dishonest AI is the weakest link to experience design and delivery.

It has been exceedingly easy to put technology before experience strategy—even easier to interchange the terms and assume that the technology miraculously replaces a strategy. Entire categories of point solutions and experience delivery tools have sprung from the desire to not just create and deploy digital experiences but also to connect them into measurable and repeatable journeys.

Technology is not a strategy. CX and EX are strategies—critical strategies for the lasting success of an enterprise. What experience strategies need are flexible, composable, and scalable technologies to underpin and support the delivery, flexibility, and continuous evolution of these strategies.

The Call to Experience Action in Government

In a 2023 Deloitte survey of 5,800 individuals in 13 countries, customer satisfaction in the delivery of digital government services was 21 percentage points behind satisfaction ratings of private-sector businesses.⁴ Customers tend to have higher levels of trust in government when they have higher levels of satisfaction in digital government services, notes a recent Qualtrics study of U.S. citizens.⁵ Federal services such as Medicare and the United States Postal Service have begun to deliver experiences that users feel meet or beat private-sector services. Others, such as state department of motor vehicles (DMVs) and state tax services, fall far behind in experience rankings.

As investments are being made into experience solutions across the public sector, customer expectations are being driven by the CX and EX strategies from the private sector, making meeting these heightened and ever-accelerating experience expectations even more difficult.

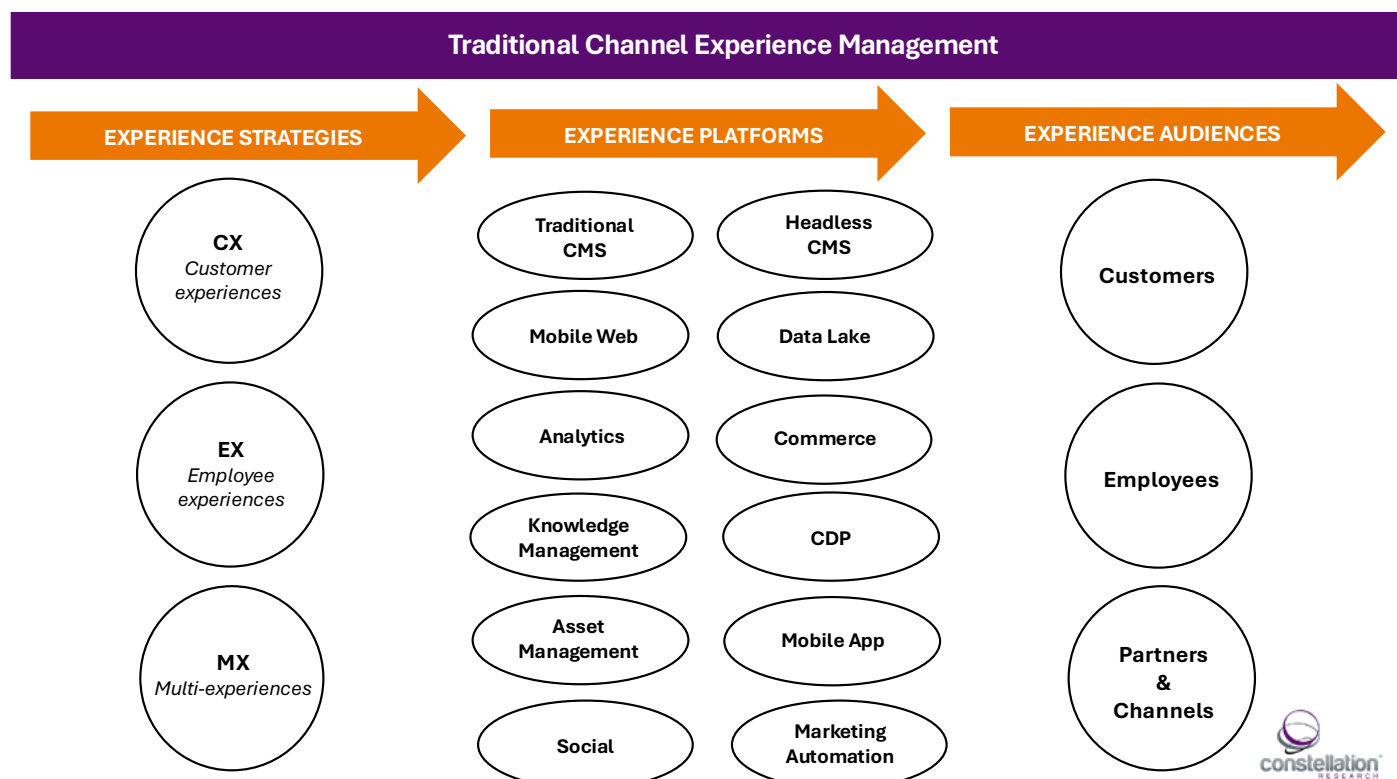
THE EARLY DAYS OF EXPERIENCE MANAGEMENT

The goal of technology is to deliver a more precise engagement that leverages the right message, content, and asset to the right user, in the right moment, and in the customer's channel of choice. Thanks to AI, this level of precision engagement is even more possible, scalable, focused, and contextual to the individual user. Yet it is completely dependent on the connectivity, availability, and interoperability of the vast portfolio of experience-driven tools at any team's disposal.

This can best be described as a system for managing channels effectively as opposed to a system for managing customer experiences effectively (see Figure 1). Moreover, this is what should be described as the earliest form of channel experience management.

Through this lens, channel experience management would be defined as the ability to manage content, assets, and initiatives across experience delivery channels. Managing this process would be as simple as outlining a single outcome that maps to a single process, journey, and applications an enterprise wants a customer and/or an employee to take or use; creating those digital products and destinations; and then leaving the user to navigate along that path. This older, more traditional framework is exceedingly easy to manage in limited scenarios where there is a controlled (or, more to the point, limited) number of experience strategies powered by limited channels across which users can engage. This channel experience management mindset is best suited for a single user (for

Figure 1. The Framework of Channel Experience Management



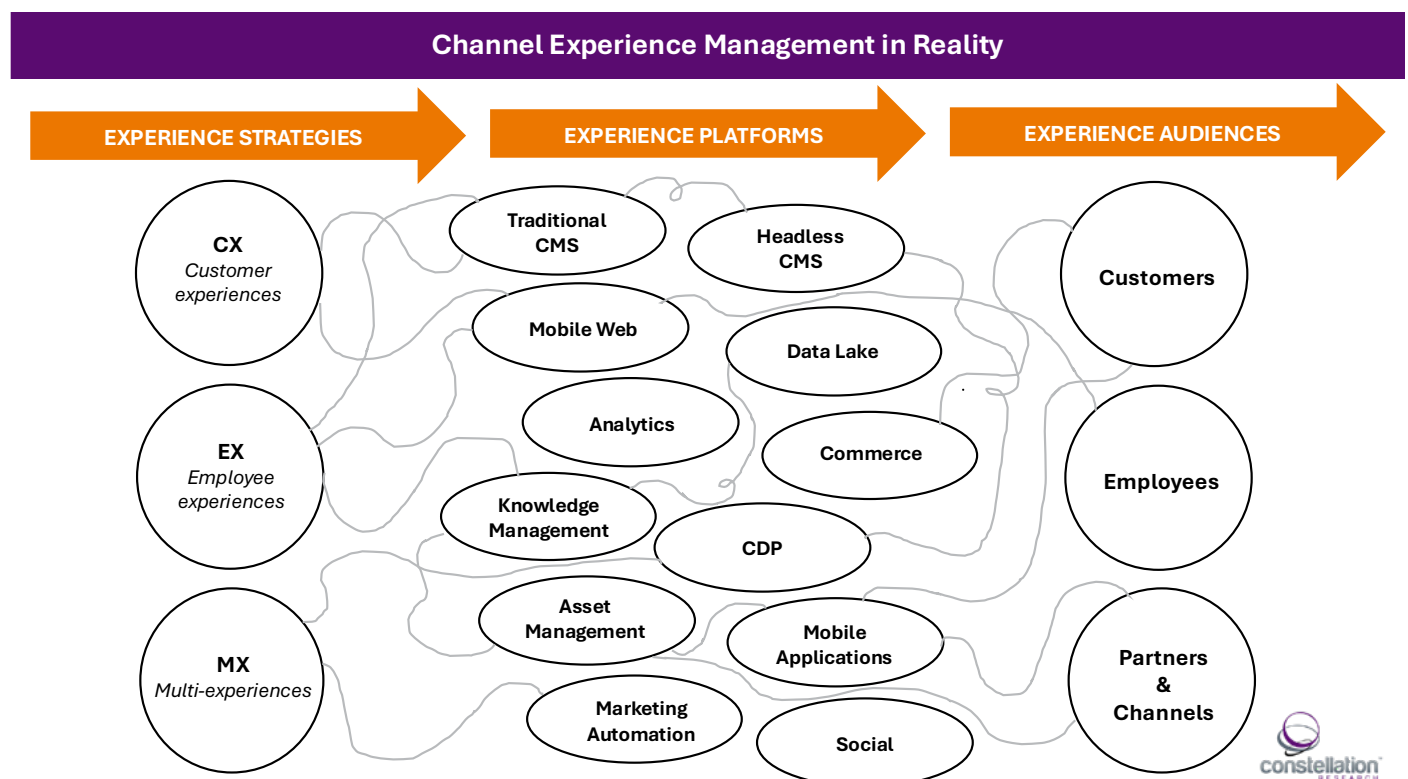
Source: Constellation Research

example, the customer) who engages only in a single channel (for example, the website) in a linear and simple transactional engagement.

Sadly, this nirvana situation is rare in the modern age of digital engagement and AI.

What often happens is a tangled web of multiple experience strategies attempting to create distinct experiences using overlapping tools and limited shared repositories of content, assets, and insights to drive performance. The chaos in between (as demonstrated in Figure 2) as strategies and channels intertwine and separate instances of content and creative are created, stored, and deployed in individual channels creates unintentional gaps in function, causing developers to frantically plug holes via custom applications. This experience development is built almost entirely in a completely pro-code environment, leaving no space for more modern low-code application development by those practitioners and business users who sit closer to experience delivery and demand. The entirety of

Figure 2. The Chaos of Channel Experience Management



Source: Constellation Research

channel experience management, from experience design and app creation to process automation and deployment orchestration, excludes the citizen developer, overlooking a key stakeholder critical to accelerating outcomes and impact.

But it should also be noted that traditional channel-driven experience management is never as easy as it looks. The pathways of data, intelligence, assets, and strategy are never linear. In today's age of AI-driven personalization and contextual experience design, the chaos is amplified when data and intelligence streams fail to inform and connect to the platforms powering experience.

This chaos wrangling takes away from what all stakeholders involved truly want: to translate strategy into provable, scalable action. Moreover, this chaos leaves a stain on experience, asking the user to work harder to make up for any deficiencies or gaps created by siloed disconnections.

THE CALL FOR A “TOTAL” SOLUTION

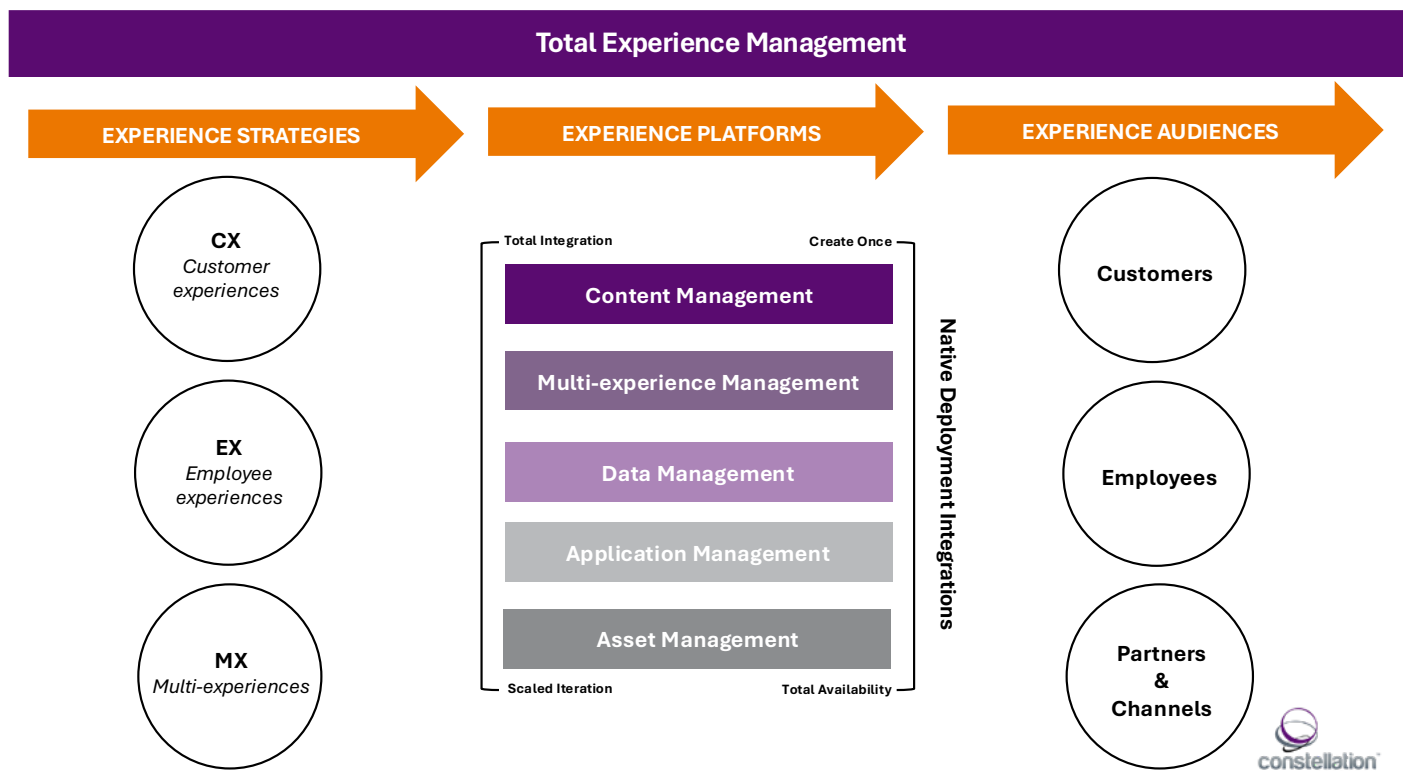
To manage experience strategies, a new technology approach is required. Total experience management focuses on the connected output across engagement and experience as opposed to the individual channels and presentations of old content operations.

In 2022, Gartner introduced TX as “a business strategy that creates superior shared experiences by weaving together four disciplines—EX, CX, UX, and MX—across multiple touchpoints to accelerate growth.” For Gartner, TX seems to serve as a follow-up to the introduction of the product category known as the digital experience platform (DXP), which in 2018 was defined as “an integrated set of core technologies that support the composition, management, delivery, and optimization of contextualized digital experiences.”

Evolving the Transformational Impact of Total Experience

Constellation Research has chosen to expand the aperture of TX to elevate the conversation focused on “disciplines” and instead employ the totality of experience to be enterprisewide-embraced and -understood strategies (see Figure 3). Although the early concepts of TX did a fine job aggregating

Figure 3. Total Experience Management



Source: Constellation Research

technologies and disciplines into easily packaged technology stock keeping units (SKUs), the lack of specificity around data, application, and asset management led to confusion and eventually apathy. The reality here is that these critical experience strategies cannot be confused with functional disciplines powered by functional technology stacks—which is what caused critical strategies such as CX and EX to become siloed and fractured in the first place. The race to “own” a “discipline” has unintentionally turned centers of functional excellence into warring fiefdoms with competing tech stacks and estates, adding to the chaos of channel-driven experiences noted previously.

Modern TX aims to be the foundational underpinning that translates experience strategy into accelerated action. It moves beyond the concept that outputs successfully appearing on appropriate presentation channels is the end goal of a modern digital experience platform. It unifies capabilities around holistic and unified experience strategies as opposed to segmenting capabilities by audience, operational function, or channel.

Core to a modern TX platform is the availability of a truly modern content management system (CMS), digital asset management (DAM), capacity for MX management and orchestration, data management that establishes a hub for customer data (a customer data platform [CDP] that reaches beyond marketing data and marketing applications), and app development specifically in the form of low-code and no-code tooling to make application development easier and more fluid to the experience deployment process.

Connection to and bidirectional influence over customer data is also important to not only fuel AI decisioning and generative AI training, but also to prove and measure experience impact via robust analytics tied to digital intent, digital body language, and contextual sentiment. These data connections should include API connections or native integrations to systems such as customer relationship management (CRM), IT-managed and maintained data lakes, customer service-maintained customer interaction data platforms, and event-based and interaction-based experiences.

The most critical aspect of a modern TX platform has less to do with technologies or platforms and far more to do with access and, more specifically, with properly positioning the user as the primary player in experience delivery. It requires we recalibrate who “you” represents in experience delivery:

- **You** should experience consistency in brand, content, sentiment, and delivery across all channels (even those you don’t know you wanted to use).
- **You** should have access to and engage with experiences that you understand, in your language and in your favorite destination—and those experiences you understand should have an ambient yet perceptible, predictable, and valuable understanding of you (and all the things you want, expect, and appreciate).
- **You** are part of a much bigger pool of people engaging and experiencing. That pool is known as “everyone,” and everyone should believe that they can safely and reliably engage and re-engage at the pace they desire.

Devices, destinations, and presentation layers will come and go as experience technologies innovate and expand. Channel flexibility and fluidity is core to every experience strategy and, therefore, is a central capability a TX platform should enable. Imagine for a moment being asked to do less to achieve more. This is the goal of a streamlined TX strategy and the output of a TX platform.

TX also encourages every organization to reframe what content is; where it should be created, stored, and optimized; and how it should be delivered. TX flips the paradigm of operational efficiencies by enabling experiences, engagements, and applications where simplification rules and the easiest path to task completion is the new normal.

This core foundation of tools, data, and processes is collectivized and integrated in service of accelerating outcomes and opportunity: the opportunity to more effectively connect users with their desired experience outcomes. The intent of TX should be to blur the lines between CX and EX operations by streamlining, connecting, and unifying UX and MX technologies with the direct intention of driving durable and sustainable growth.

TX IN ACTION

Modernization can be hard to imagine without concrete examples such as the two use cases described below.

State of Ohio Lowers Costs While Transforming CX and EX

The State of Ohio sought an easier path for citizens to access public services—something that would be amplified and even more critical in times of crisis. For many government agencies, the priorities of the citizenry revolve around the delivery of services. But often, modernization and digitization of government processes can be a seemingly impossible task. Security, scalability, and the capacity to customize and specialize applications with limited resources is a daily consideration.

The state also set its sights on empowering businesses to have a more seamless experience when doing business with government agencies and departments. To achieve all these goals, Ohio sought to

overhaul and enhance its digital channels and drive its CX and EX goals and strategies through a more holistic TX management solution for heightened visibility, efficiencies, and scale.

Through a partnership with HCLSoftware and digital transformation consulting firm Base22, the state set out to better understand where Ohio and its residents stood in what HCL defines as the “Digital Plus Economy”—an economic landscape where leaders drive transformation with advanced digital technologies such as AI, data analytics, and automation to not only transform operations but also to create new revenue streams, improve CX, and drive innovation and impactful digital transformation. Ohio’s first point of transformation involved creating a unified space to deliver TX.

To establish this, the team created the Ohio Digital Experience (ODX), a strategy focused on creating better user experiences for the state’s workforce, citizens, and businesses. Two critical digital destinations—myOhio (a statewide employee portal) and Ohio.gov (a citizen-facing portal)—were established, along with a critical identity-management platform and full single sign-on (SSO) capabilities. With more than 100 different entities providing services across the state, ease of use and speed of application were key to establishing trust across a broad group of stakeholders, creators, and contributors. People had to want to use it.

The results of the modernization efforts have been nothing short of impressive: Citizens, employees, and businesses responded to this new digital future with business-critical requests on the platform, increasing from 200,000 requests per hour prepandemic to a staggering 6 million requests per hour without interruption. The establishment of ODX as a centralized TX hub for the State of Ohio also enabled real cost savings, avoiding expensive infrastructure investments and eliminating the need for significant ongoing and monthly technical work. The state estimates that it avoided costs in the range of \$18 million while providing an even higher level of service and value to all stakeholders.

The ODX framework enabled specific state agencies to also achieve impressive results, with the Department of Agriculture deploying content management solutions that resulted in an 80% reduction in calls for help to find content across sites. The Department of Health leveraged ODX

and HCL Digital Experience to create self-service capabilities, cutting help desk calls for tasks such as password resets by 40%—an efficiency predicted to drive an annual cost savings of \$75,000.

Multiple agencies. Multiple strategies. Multiple constituencies. One unified, end-to-end holistic TX platform.

Middle Eastern Government Agency Modernizes With TX Foundation

This strategy of establishing a flexible, scalable TX foundation was also deployed by a government organization for a Middle Eastern country with the unique challenge to modernize a largely paper-based process to deliver services to its primarily mobile-based citizenry. With a mission of providing peace and security to its citizens, this government services organization sought to transform its more-than-50-year-old organization into a high-tech yet easy-to-use modern, electronic, digital-forward experience delivery organization. Key to this was the capacity to deliver services around the clock, in multiple languages, across the organization's broad portfolio of more than 165 services.

This TX infrastructure needed to be secure, performant, reliable, available, and scalable and to have the flexibility to add features as time and the citizenry demanded. With secure connections, encryption across data, robust firewall protection, and adherence to the OWASP checklist for mobile security, the e-service system needed to allow dynamic feature additions while maintaining availability and service continuity.

The government organization partnered with HCLSoftware, leaning into an initial deployment of the HCL Volt MX, a cornerstone of HCL's TX platform. The result was a mobile application designed and developed to be the primary delivery channel for services. These services include access to all official government documents; "smart services" that include automations without need for further user intervention; visa services including extending and renewing visas; payment services for permits and bills; and even the ability to settle traffic violations.

Over time, the government has been able to expand its list of services, increasing opportunity to engage with citizens in the channel of their choosing, and to incrementally increase overall trust in

government through consistent, available, and reliable services around the clock in “one click.” The application includes feedback loops to gain important insights from users, pinpointing enhancements and fixes that can further the goals of operational efficiency; continuous improvement; and limitless expansion of citizen, business, and government experience.

TAKEAWAYS AND CONCLUSION

Government service organizations face a truly unique challenge: modernize—for all users—within the boundaries of safety, security, and availability of resources. This makes the need for a TX strategy and platform even more critical. Rooted in safety and security and integrated and connected for efficiency, visibility, and provenance, a TX platform empowers agencies to move quickly and establish TX improvement initiatives without relying on IT resources while leveraging safe IT-governed and -blessed solutions. For agencies, a TX platform does far more than orchestrate siloed solutions or streamline disconnected disciplines: It centralizes and harmonizes the systems that bring business-critical strategies to the hands of the people most important to success.

In the case of the Middle Eastern government services organization, the mobile-first experience could not be held back by a lack of costly pro-code resources or delayed by the need to find specialized talent to manage and maintain mobile applications. The organization needed scale and service in a low-code or no-code environment to rapidly develop and reliably deploy in a dynamic manner.

This is all highly relatable well beyond the complexity of government and public sector use cases. No matter the industry, any organization can relate to the call to modernize and transform. However, much like these government agencies, the call to action to more effectively and efficiently drive growth via truly unified CX and EX strategies cannot be ignored. With a more modern vision for TX, every strategy, every audience, every user, and every industry has a path forward that scales and grows for every future.

The following are common best practices for organizations looking to more effectively deliver on experience strategies:

- **Technology alone is not an experience strategy.** Technology is required to effectively deliver on an experience strategy. There is a difference. Organizations successfully modernizing are outlining their experience strategy goals across customer, employee, partner, and market experiences as specific and separated strategic goals. This is followed by outlining the MX engagement demands that include a deep understanding of UX, UI, mobile applications, digital experience, and multichannel content and asset delivery.
- **Battles between selecting platforms versus suites can leave the user behind.** Ask hard questions of vendors, focusing on the required solutions and the required integrations needed to deliver scalable applications focused on user strategies. TX platforms focus on ease and speed of use because of the connectivity, integration, and holistic nature of the platform.
- **Design backward to serve strategy.** The hardest part of a TX posture will be designing backward to start delivering solutions based on the users' demands and expectations as opposed to serving experiences based on what can be developed and delivered. One of the most tangible values of a TX platform is the opportunity to embrace existing technology and data investments while removing complexity and costs.
- **Create a single source of experience truth.** This source of truth should include a centralized hub for content, for assets, for data, and for knowledge. It should collectivize, categorize, and prioritize resources to turn anything into the raw material that can power engagement. Thanks to AI—and, more specifically, to generative AI tools—a single source can analyze data, establish segmentation, personalize, and individualize at scale for a vast array of users while maintaining the security and governance boundaries set across the platform.

The traditional functional boundaries that once limited shared resources and services to act in service of customers and employees can no longer exist in the modern digitally driven enterprise. TX as a methodology and foundational technology infrastructure demands that limiting boundaries be removed, all in the name of delivering on the promises made in CX, EX, and MX strategies.

This does not mean that any centers of excellence found in functional teams should be eliminated. Instead, these functional leaders must be empowered to build, deploy, and optimize in the name of experience. They should be empowered to build the applications most valuable to the strategy and, in the end, most valuable to experience and engagement.

ENDNOTE

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Liz Miller is a vice president and principal analyst at Constellation Research focused on the business demands on today's chief marketing officer, the evolution of customer engagement, and the rising requirement for a new security posture that accounts for the threat to brand trust. A 27-year marketing veteran, Miller offers guidance on the leadership, business transformation, and technology requirements for today's marketing organizations and how to effectively transform business models to stay competitive in the shifting digital landscape. She examines the key trends modern CMOs face, ranging from the realities of engagement in the trust economy to how marketing has become enterprise security's greatest threat and critical champion.

Prior to joining Constellation Research, Miller oversaw research, programs, and content for the Chief Marketing Officer Council, developing thought leadership agendas for CMOs around the globe. Miller also counseled numerous organizations on core messaging and competitive advantage, working with marketing, advertising, and security solutions. Miller is a skilled moderator, facilitator, and speaker, engaging C-suite executives in hundreds of industry webcasts and roundtables, keynote presentations, and panels around the globe.

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