



Digital Transformation — A Necessity In Times Of Uncertainty

FEATURING RESEARCH FROM FORRESTER

The Pandemic Recession Demands A
Digital Response

In the wake of the COVID-19 pandemic, and a subsequent recession, companies must focus on their core business applications now more than ever.

HOW YOUR ORGANIZATION CAN ADAPT AND TRANSFORM

In the past, companies had the opportunity to consider digital transformation as being optional. However, when faced with the unprecedented year that 2020 has been, these organizations are learning that their deprioritizing of digital transformation was a costly error. In order to come out stronger on the other side of this pandemic, companies must focus on three strategies:

- **Innovate through ecosystems.** An innovative firm optimizes their investments to create actionable insights with strong partnerships across ecosystems. By focusing on transforming their core applications and utilizing the vast amount of resources from third-party vendors, businesses can elevate their digital transformation strategy.
- **Accelerate results with your partners.** Collaborate with partners to quickly find solutions to business problems. By integrating experts into ecosystems, firms can realize returns on investment at a quicker and more efficient rate.
- **Operate with flexibility.** Successful firms empower faster decision making by encouraging flexibility. Current events have shown that firms must be more flexible in times of volatility and uncertainty. In order to succeed, companies should ensure projects have a clear roadmap and budget. However, they must also realize there may be some degree of uncertainty when considering delivery dates.

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HOW IBM CAN HELP

At IBM, we have a proven track record of guiding companies through digital transformation by fast-tracking their core applications. As digital reinvention has taken on a whole new meaning in light of the recession, we recognize that it is needed now more than ever. Our goal is to partner with you not only to endure the current state, but to also thrive as digitally renovated organizations in the future. To help accomplish this goal, we focus on four main pillars:

- **Define and deliver the business case.** Companies need to move faster than ever to overcome the hurdles created by the pandemic. We have invested to build best-in-class tools and processes to help you define the business case and to accelerate implementation. With this acceleration, you can realize value in a much timelier manner.

- **Make innovation part of the process.** IBM is focused on the next generation of intelligent industry workflows. We have created an integrated platform that infuses innovations that matter, such as IMPACT templates, AI, automation, LOB integration, and security while delivering the digital core. We recognize that a focus on core business applications is key now and in the future.
- **Enable the hybrid cloud journey.** At IBM, we also strongly believe that enabling the hybrid cloud journey is paramount. We have designed our own world class cloud capabilities for our customers, in addition to investing in rich partnerships with hyperscalers. These partnerships enable our platform and industry templates to be utilized on their solutions and help define industry market approved journeys.
- **Leverage the power of partnership.** As discussed throughout the following report, ecosystems and partnerships with third-party vendors are a necessity moving forward. We are evolving our partnerships to the next level by defining additional areas to jointly invest to further automate client implementations. As a result, we can better deliver industry critical innovations as part of your digital core journey.

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The Pandemic Recession Demands A Digital Response

To Adapt And Grow, Businesses Must Get Lean, Go All In On Ecosystems, And Embrace Agile At Scale

by Ted Schadler
June 25, 2020



Why Read This Report

Digital transformation was never optional. But most firms treated it that way, applying digital technology in dribs and drabs — until COVID-19 shuttered economies and forever altered the patterns of life and work and commerce. Until uncertainty and volatility *became* the new normal. Every company must respond by focusing on its core and smartly outsourcing and orchestrating the resources and innovation of cloud and service partners. With this transformation approach, CIOs can help their company scale its ability to adapt and grow into the post-pandemic era.

Key Takeaways

The Pandemic Recession Rewards Focus

In this moment of clarity, boardrooms and leadership teams realize what a blessing cloud and service partners have been to their ability to serve customers and keep remote workers productive and safe, despite unimagined disruptions. They realize these resources (and their service partners) are essential to adapt to extreme volatility and return to growth.

Innovation Through Ecosystems Is What To Do

This is the opposite of “not invented here.” This lean approach instead prods every company to ask, “What’s the least we can do ourselves and the most we can get out of partners?” A newly focused firm outsources for speed and innovation, orchestrates cloud resources for agility and differentiation, and operates for resilience and insights.

Agile At Scale Is How To Do It

Firms committed to being lean bring agile planning and execution into every facet and edge of their organization. They assemble squads of employees from different departments, incorporate partners’ resources, and operate as a multidisciplinary team. They adopt a transformation process that we call “agile at scale” to continuously set outcomes, move fast, measure impact, and fix mistakes while they’re still small.

The Pandemic Recession Demands A Digital Response

To Adapt And Grow, Businesses Must Get Lean, Go All In On Ecosystems, And Embrace Agile At Scale



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Related Research Documents

[Don't Buy Software Without A Services Partner At The Table](#)

[Forrester Infographic: Digital Experts Show How To Get The Most From Service Providers](#)



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In This Moment, Every Firm Understands What It Means To Be Digital

COVID-19 is not a normal disease, and this is not a normal recession. It's a pandemic-induced recession that will be fueled by fear and shaped by the restarting and retrenchment of markets and economies as rolling waves of infection are beaten back, only to surge once more.¹ Volatility and uncertainty are the new normal, and every company must adapt. CIOs will play an important leadership role in this effort because technology is at the heart of business transformation.

Firms will react differently depending on whether they're in survival mode, adaptive mode, or growth mode.² But in this moment of clarity, boardrooms and leadership teams have realized what a blessing cloud vendors and service providers have been to their ability to serve customers virtually, keep remote workers productive, and even grow in spite of fragile supply chains.³ They see what a boon digital has been to adapting rapidly and how important digital insights are in understanding threats and opportunities and anticipating what to do next.⁴

DON'T WASTE THIS MOMENT: LAY THE FOUNDATIONS FOR YOUR POST-PANDEMIC SELF

Digital has been the only reasonable response to the COVID-19 crisis. And it's the only reasonable response to the pandemic recession. What every company and institution has just experienced is the new, post-pandemic normal: volatility, uncertainty, and the need for resilience and informed action. Seize this moment. Use the motivation of the pandemic recession to become the business you want to be, to work your new digital muscles, and to strive to become a "future fit" firm that can rapidly sense and adapt to the world in which we live.⁵

If you make these changes and the future turns out to be staid and stable, you'll still be best prepared for growth on the backside recovery. But if the future is increasingly volatile — and we're coaching even our children to expect this — then you've laid the foundations and created the ability to be resilient and adapt. In either case, you'll survive this current crisis, and your post-pandemic self will be poised and ready for the next one. We believe this is the moment in history when every organization will make the commitment to become lean and embrace a transformation model we call co-innovation agility (see Figure 1). In this approach:

1. Focus on your core capabilities and smartly outsource other capabilities to partners that are motivated to continuously improve them to win and keep your business.
2. Scale up agile planning and execution in every facet of your business to be more adaptive to demand and more resilient to threats by orchestrating the resources of the ecosystem.

FIGURE 1 Co-Innovation Agility Is The Right Model For Digital Business Transformation

Traditional businesses	Co-innovation agility businesses
Own most business capabilities and integrate them for control	Own as little as possible while orchestrating as much as possible for innovation and agility
Sell products and services as a single transaction	Create offerings with ongoing value delivery (e.g., subscriptions, outcomes, or transaction fees)
Operate as siloed functions and business units for scale and efficiency	Organize into multidisciplinary squads for a focus on customer, employee, and partner success
Use command-and-control decision making for efficiency and top-down coordination	Empower collaborative decision making for cross-functional, aligned action
Tightly integrate and couple processes for efficiency	Create and orchestrate process building blocks for resilience, agility, and platform leverage
Isolate data for compliance and control	Curate, aggregate, and harness data for insights and action

Outsource For Speed And Orchestrate For Advantage

You'll acquire a sharp focus on what differentiates you. You'll improve your speed to market and your operational excellence, traits that serve you well in uncertain times and in growth times, too. Businesses that are committed to getting lean will spin up a flywheel of continuous innovation at the intersection of digital experiences and digital operations and embrace the habits of first movers.⁶

- › **“Innovation through ecosystems” is what to do.** This is the opposite of “not invented here.” This lean approach instead prods every company to ask, “What’s the least we can do ourselves and the most we can get out of partners?” Tapping the resources and innovation of the cloud and orchestrating those resources has allowed firms to respond to the crisis in days rather than years. These firms embrace co-innovation partnerships with a new level of engagement, alignment, and executive involvement.
- › **“Agile at scale” is how to do it.** This is the opposite of waterfall approaches, siloed teams, and risk-averse behaviors. It’s guided by frameworks like OKRs (objectives and key results) and creates a way of working that brings business, technology, and operations teams together in an agile cycle.⁷ It puts outcomes and data at the heart of the transformation process, with metrics that align decisions, actions, and teams.⁸ A fully agile firm sets outcomes, moves fast, measures impact, and fixes mistakes while they’re still small.

Focus On Your Core And Leverage Cloud And Service Partners

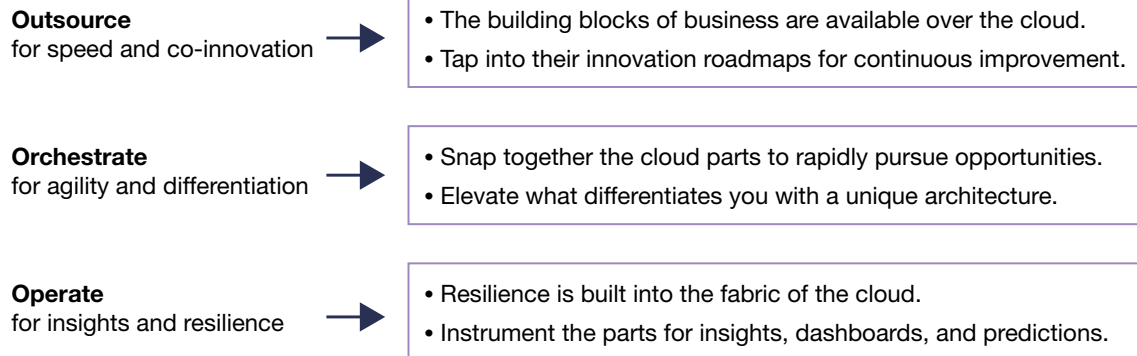
Lean firms focus on their core and leverage the resources of others. To achieve this, your success is entirely dependent on how well you structure and manage your relationships with the universe of third-party resources and capabilities available over the cloud. We call this “innovation through ecosystems”:

Innovation through ecosystems happens when organizations actively collaborate with their cloud, software, and service providers, value-aligned through common purpose and financial incentives.

Innovation through ecosystems doesn't happen by waiting and hoping that someone else will solve your business problem. It's also not something you do on your own. Instead, you work in concert with many partners, each working independently to improve their contribution to your outcomes (see Figure 2). Agile firms like Goldman Sachs have industrialized their approach to innovation through ecosystems to:

- › **Outsource for speed and co-innovation.** Cloud providers offer prepackaged parts that firms can deploy to move quickly. When Goldman Sachs entered the retail lending business with its Marcus subsidiary, it worked with McKinsey & Company to orchestrate the resources of the cloud, including Adobe Analytics, DocuSign, Microsoft Azure, and Salesforce. Time to launch? Eighteen months.⁹ And each one of those cloud parts has been getting better every day since.
- › **Orchestrate for agility and differentiation.** Nothing is built from a single part, and no part by itself will differentiate you. But pulling cloud parts together into a unique business architecture can fulfill a unique value proposition. Marcus mastered orchestration — the ability to source, integrate, instrument, and workflow-enable cloud parts — to enter a competitive market with a simple, low-cost offering via a new business platform.¹⁰ Marcus worked with a global systems integrator to do this for its new consumer deposits business.
- › **Operate for insights and resilience.** Resilience has never looked so vital — or more likely to become an auditable metric.¹¹ You can build cloud resilience into your operating model when you instrument the cloud parts and create dashboards that empower teams to act at a moment's notice or apply AI to spot trouble and opportunities. Marcus used this technique to identify that loan fees were causing some applicants to stop the loan process. The solution? Eliminate those fees by pricing processing costs into the loan rate.

FIGURE 2 How Innovation Through Ecosystems Works

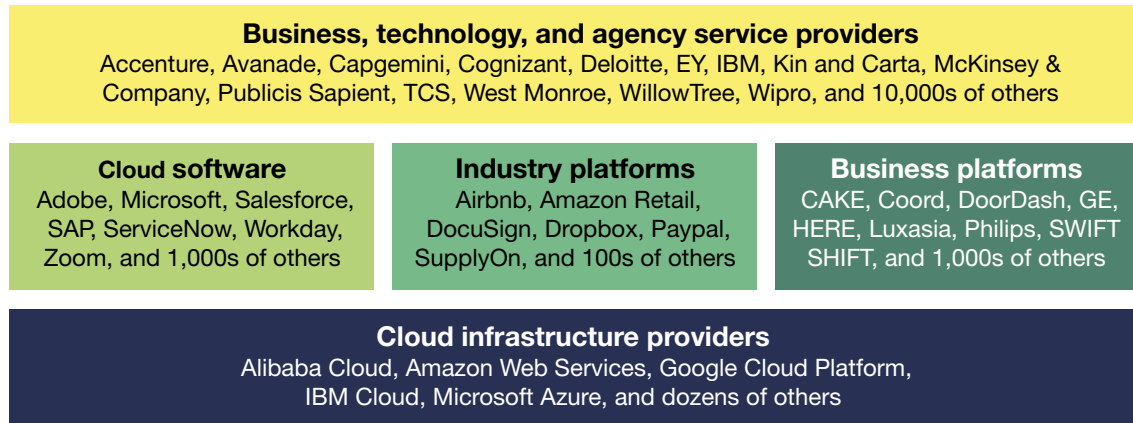


YOUR DIGITAL ECOSYSTEM IS AN EVER-EXPANDING SOURCE OF INNOVATION AND VALUE

You are a click away from a massive set of raw materials — hardware, software, industry, and business services — to build and operate your business. At the same time, service providers have been building deeper cloud skills and orchestration capabilities. These resources come together into a digital ecosystem that (see Figure 3):¹²

- › **Spawns massive ecosystems with innovation on steroids.** Salesforce drew 170,000 attendees to its 2019 Dreamforce and has tens of thousands of software and service partners extending or adapting its clouds.¹³ This level of ecosystem investment far surpasses the networks that formed around on-premises software. Companies can work with service providers to assemble and orchestrate the business building blocks they need.
- › **Offers an ever-expanding portfolio of business building blocks.** It's not just the high-tech industry that harnesses the cloud. Any company with a digital service can offer it over the cloud — claims processing, payments, food delivery, call centers, supply chain monitoring, and thousands of others. GE Aviation, for example, hosts its flight analytics services over the cloud to help airlines optimize their fuel and safety operations.¹⁴
- › **Provides the onramp for emerging technologies.** No longer is emerging technology trapped in boxes in your data center. The major advances in AI and machine learning are available from the cloud giants and software-as-a-service (SaaS) providers. Quantum computing, blockchain, computer vision, and internet of things are only the latest technologies and resources to be available over the cloud from IBM, Microsoft, and others.

FIGURE 3 The Digital Ecosystem Spans An Ever-Expanding Portfolio Of Resources And Capabilities



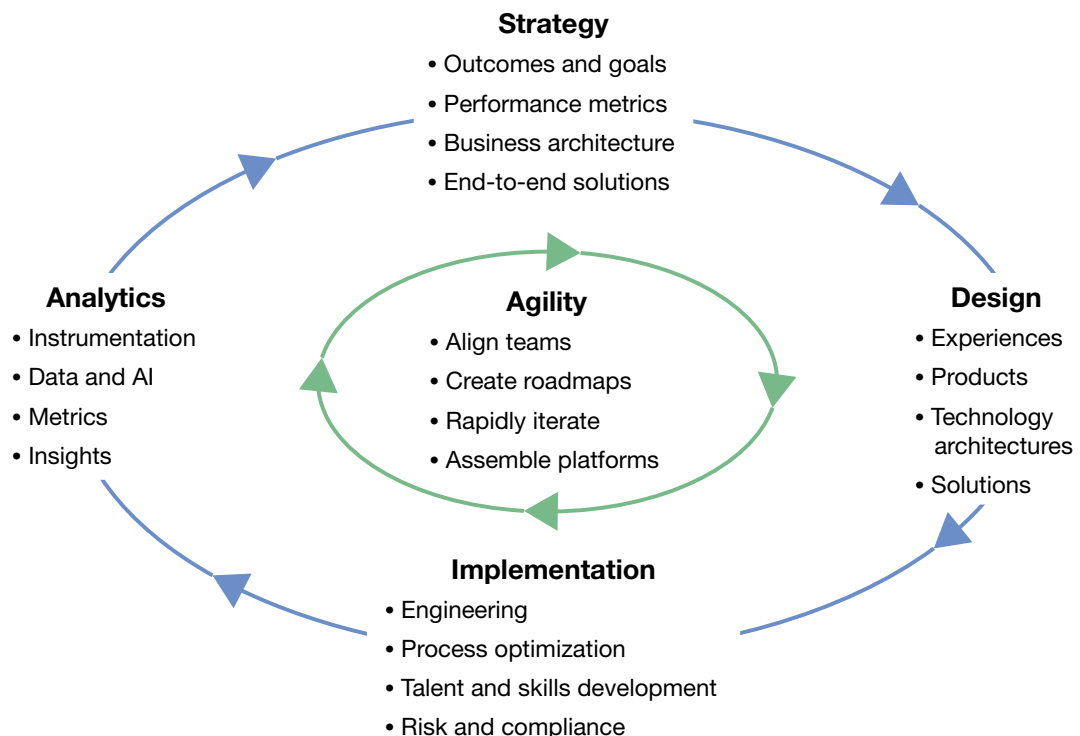
Clarity And Urgency (Finally) Bring Agile To Planning And Execution

When Hertz wanted to support New York City healthcare workers with free car rentals during the COVID-19 surge, it needed to cycle through strategy, design, implementation, and analytics in days.¹⁵ That took coordination, technology, and a willingness to adapt on the fly. Firms committed to being lean work differently. They drive agile planning and execution into every facet and edge of their organization. They assemble squads of employees from different departments with different perspectives and skills; incorporate partners' resources; and operate as a multidisciplinary team that implements the cycles and steps of agile at scale (see Figure 4).¹⁶

- › **Strategy defines the outcomes and a future-state business architecture.** Strategy without execution is wishful thinking. To innovate through ecosystems, start by figuring out what you want to accomplish, then check that against what's possible with the technology available or coming soon. This is the hardest part, and one with which you'll likely want help. EY uses this technique to help insurers and agricultural giants imagine a future state and then focus on the concrete steps to take today.¹⁷
- › **Design means crafting the best experience and architecture.** Human-centered design is where strategy meets customer experience, defining the offering and the service that fulfills it. Design is also where strategy and implementation meet, where trade-offs based on what's possible shape the roadmap. Both must work to achieve the goals.¹⁸ BP uses this technique to rapidly identify, prototype, and test ideas. BP Castrol explored 18 significant customer experience improvements in 18 months and scaled six of them around the world.¹⁹

- › **Implementation includes technology, process, and people.** The ability to assemble differentiating solutions by orchestrating simple building blocks requires gathering around the problem to address all the facets simultaneously. IBM Garage uses a multimetric model — contribution to business value, benefit to consumer or employee, and progress toward completion — to coordinate the work of business, technology, and operations teams. This approach naturally aligns different groups toward a common purpose and way of working.
- › **Analytics provides the means to measure, optimize, and manage the result.** Flying blind is not an option. Only by instrumenting the interfaces, processes, and outcomes can firms know how their experiences and operations are working. They should embed analytics — metrics, instrumentation, dashboards, and AI — into the agile cycle from the beginning. A key principle learned by companies like ING Bank and Intuit is that nothing ships without the proper analytics in place.²⁰ Anything less would be clueless.
- › **Agility comes from working differently with platforms that accelerate change.** Things can move quickly when built on cloud resources. But beware of creating “islands” in functional areas like marketing due to one-off technology choices.²¹ Instead, work with your CIO to choose anchor tenant vendors in your business and technology architecture that have scale, ecosystems, and financial stability. From this foundation, you can surge in different directions from a rock-solid core.

FIGURE 4 The Cycles And Steps Of Agile At Scale



Agile At Scale Will Lead To A More Value-Aligned Way Of Working

Lean firms drive agile out to the edges of their businesses by mastering the agile process at every altitude, from business planning to project execution. They embed it into every innovation and business transformation process. As they gain confidence and mastery in the agile mechanism, they expand this agile way of working to everything they do — including customer experiences, product development, marketing, sales, operations, employee experience, IT, and new business models. They learn that defining outcomes and metrics aligns teams and co-innovation partners in powerful ways by:

- › **Organizing with a common purpose to focus on customers, employees, and partners.** You'll never be in a steady state; you'll always have to adapt to some threat or opportunity. To address the ever-changing needs, you'll adopt a new approach based on collaborative decision making, "swarming," and collective action. This works best with the right objectives and metrics in place, the right leadership support, and a willingness to embrace a "culture of cultures" to bridge gaps between teams and ecosystem partners.
- › **Accepting uncertainty on feature timing as the right trade-off in agile execution.** In technology-driven transformation, it's impossible to be simultaneously on time, on budget, and feature complete. Something must give. Agile at scale works only if you're willing to manage projects with clear roadmaps and budgets, but with uncertain feature delivery dates. This simple choice has massive implications on how you work with service providers; how procurement does its job; and how you explain your strategic goals and commitments to customers, employees, and investors.²²
- › **Building outcome incentives and a common purpose into every business agreement.** "If I have to open the contract, the partnership has failed," said Steve Bandrowczak, Xerox president and chief operations officer, when commenting on a \$1.3 billion shared services agreement with HCL Technologies.²³ His point was that the structure of the agreement protects both parties by tying compensation to specific outcomes. This outcomes-based model is key to aligning the capabilities and incentives of every player in the digital ecosystem. You can help by establishing a new procurement protocol.
- › **Weaving insights into the fabric of the work.** Let's break this down. First, identify the key results that matter: customer benefit, business value, employee engagement, and so on. Use these metrics to align the interests and motivations of all players, and measure the impact of each spin through the agile cycle. Second, become insights-driven. Curate your data resources, integrate them with external data, and continuously scan the environment for risks and opportunities. Use data and insights to guide your strategy and design choices.

What It Means

In Innovation Through Ecosystems, Everybody Has A New Part To Play

Each participant in the extended digital ecosystem will have a new part to play — with each contributing something toward a measurable result, a business outcome. This “value realization” means that all parties are rewarded when the company at the end of the value chain accomplishes something they care about: order taken, revenue increased, cost-to-serve reduced, claim processed, customer onboarded, and risk mitigated. To achieve these results, CIOs and their procurement professionals should ask themselves and their providers to shift to a value-realized approach. During the pandemic recession and beyond, we anticipate that:

- › **Cloud infrastructure and platform vendors will extend their value-realization models.** Cloud infrastructure providers have the best-aligned model today. After all, it doesn't get much more value-realized than paying only for compute cycles, assuming they're put to good use. The commercial model for cloud compute and storage means that cloud infrastructure, platform, and AI providers like Alibaba, Amazon, Google, IBM, and Microsoft are well aligned with outcomes, a critical component of innovation through ecosystems.
- › **SaaS vendors will adopt commercial models that align better with value realization.** The software industry has radically improved its ability to rapidly deploy new functionality to enterprise clients, but too many providers have stubbornly held on to pricing and contract models based on future deployment rather than actual value delivery. CIOs that accepted these models are now locked into paying for nonexistent employees, users, page views, or transactions. Their successors won't repeat that mistake. The SaaS vendors that will be most successful in the future will be those that best provide the agility and outcomes focus that customers need in the pandemic recession — and forever afterward — by aligning subscriptions with the value that customers realize from their software.
- › **Business platform providers will componentize their offerings.** There's a wide range of platform businesses: cloud-first payment providers like PayPal and Stripe; industrial giants like General Electric (GE) and Siemens; platform businesses like DBS and Luxasia; platform startups like DoorDash and SWIFT SHIFT; and tens of thousands of others. Each of these players wants to tap into and generate its own cloud ecosystem. Many of them have value-based commercial models already, but many are also struggling to become proper software companies with mature product management, developer networks, and industrialized customer success processes. To offer confidence and resilience, they must amp up their commitment and investment.
- › **Service providers will pivot toward value alignment.** Consultancies like Boston Consulting Group and McKinsey & Company, technology service providers like Capgemini and HCL Technologies, and full-service providers like Accenture, Deloitte, EY, IBM, and Publicis Sapient have built the full-service bones of cloud orchestration and outcome-based commercial models.

They're ready for more value alignment in contracts, staffing, and alliances. And it's not just giants. Specialists and midsize providers — from 10Pearls, Bounteous, and Kin and Carta to PK Global, VMLY&R, and West Monroe — are also doing this. But service providers must still disrupt their status quo and embrace a new business model based on full-service, shared risk, and accelerated solutions.²⁴

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Supplemental Material

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We would like to thank our colleagues, former colleague John C. McCarthy, and the hundreds of companies we have spoken to in the past 12 months, especially individuals from the following companies:

10Pearls	EY
BP	IBM
Deloitte	Mirakl

Endnotes

- ¹ See the Forrester report "[Returning To Work: How To Prepare For Pandemic Recovery.](#)"
- ² Source: "Align Your Tech Spending With Your Pandemic Priorities," Forrester (<https://www.forrester.com/fn/48hL09nWWBNewKMtrkEerS>).
- ³ Source: Allen Bonde, "In A Time Of Crisis, Can Digital Technology Save Globalization?" Forrester Blogs, April 10, 2020 (<https://go.forrester.com/blogs/in-a-time-of-crisis-can-digital-technology-save-globalization/>).
- ⁴ See the Forrester report "[The Four Essential Steps To Transform Into An Insights-Driven Business.](#)"
- ⁵ See the Forrester report "[Build An Adaptive Enterprise To Survive Uncertainty.](#)"
- ⁶ See the Forrester report "[Forrester Infographic: In Digital Transformation 2020, It's Time To Catch Up To The First Movers.](#)"
- ⁷ OKRs are a popular technique for aligning teams with common goals and metrics. For more information, see how Google's program works. Source: Google (<https://rework.withgoogle.com/guides/set-goals-with-okrs/steps/introduction/>).
- ⁸ See the Forrester report "[The Four Essential Steps To Transform Into An Insights-Driven Business.](#)"
- ⁹ Source: Rory McDonald, Samir Junnarkar, and David Lane, "Marcus by Goldman Sachs," Harvard Business Publishing, December 6, 2019 (<https://www.hbs.edu/faculty/Pages/item.aspx?num=57253>).
- ¹⁰ "We have the ambition to build a large, differentiated, highly profitable digital consumer platform. We're working to build an open architecture storefront that allows us to work with consumers to help them spend, borrow, save, and protect in an integrated, coordinated way . . . We're building it as a platform for Goldman Sachs over the next 50 years." (David Solomon, chairman and CEO, Goldman Sachs). Source: Rory McDonald, Samir Junnarkar, and David Lane, "Marcus by Goldman Sachs," Harvard Business Publishing, December 6, 2019 (<https://www.hbs.edu/faculty/Pages/item.aspx?num=57253>).
- ¹¹ McKinsey & Company has said this.
- ¹² See the Forrester report "[The Power Behind Digital Ecosystems.](#)"
- ¹³ See the Forrester report "[SaaS Marketplaces Are The New Frontier Of Enterprise Software.](#)"
- ¹⁴ Source: Forrester interview with General Electric (GE).
- ¹⁵ Source: Danielle Garrand, "Hertz offers free rental cars to health care workers in New York City," CBS News, March 25, 2020 (<https://www.cbsnews.com/news/hertz-free-rental-cars-to-health-care-workers-new-york-city/>).

¹⁶ See the Forrester report “[Forrester Infographic: The State Of Agile At Scale And Agile Expertise.](#)”

¹⁷ Source: Forrester interview with EY.

¹⁸ See the Forrester report “[The Business Impact Of Design: Five Best Practices For Measuring It.](#)”

¹⁹ Source: Forrester interview with Des Johnson, BP’s director of programme design and delivery, digital CoE.

²⁰ Source: Ted Schadler, Josh Bernoff, and Julie Ask, *The Mobile Mind Shift*, Groundswell Press, 2014 (<https://www.amazon.com/Mobile-Mind-Shift-Engineer-Business-ebook/dp/B00KADTR74/>).

²¹ See the Forrester report “[Speak The Same Language To Harmonize Martech And Digital Experience Initiatives.](#)”

²² See the Forrester report “[Agile Leadership Requires A Different Kind Of Business Case.](#)”

²³ Source: HCL Technologies presentation to Forrester analysts, May 19, 2020.

²⁴ See the Forrester report “[Spark Sustainable Innovation With The Right Transformation Partner.](#)”

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