

August 4, 2006

# The Forrester Wave™: IT Asset Management, Q3 2006

by Peter O'Neill

TECH CHOICES



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HP And CA Lead In Our Product Evaluation

by **Peter O'Neill**

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### EXECUTIVE SUMMARY

Forrester evaluated leading ITAM vendors across 43 criteria and found that HP and CA lead overall with industrial and proven solutions. BMC Software also has a leading solution and is refocusing its sales force to leverage this leadership. Altiris is a proven leader in the medium-size market, with a well-received portfolio approach. USU and PS'SOFT are leading European solution providers with enterprise and mid-market success. Provance Technologies sells primarily to service providers that offer ITAM as a service. MRO Software is a leading facilities and ITAM vendor, with less focus on IT aspects than others. Centennial Software and REALTECH are two vendors that address specific customer segments, but with less ITAM functionality.

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### NOTES & RESOURCES

Forrester conducted evaluations in March 2006 and interviewed 10 vendor companies: Altiris, BMC Software, CA, Centennial Software, HP, MRO Software, Provance Technologies, PS'SOFT, REALTECH, and USU.

#### **Related Research Documents**

["The Forrester Wave™: Application Mapping For The CMDB, Q1 2006"](#)

February 27, 2006, Tech Choices

["IT Asset Management, ITIL, And The CMDB: Paving The Way For BSM"](#)

October 25, 2005, Trends

## TARGET AUDIENCE

IT operations/engineering professional, IT sourcing professional, technology marketing, sales, and management professional

## MOST IT EXECUTIVES DO NOT KNOW THEIR IT ESTATE WELL ENOUGH

Investments in IT asset management (ITAM) projects — the accounting for all assets throughout their life cycle from procurement to disposal — are increasing as enterprises react to compliancy pressure and realize that good documentation of their IT “estate” is a foundation for many other goals they wish to achieve — especially the one of running IT as a business. IT organizations are beginning to develop true business service management (BSM) systems by doing two things: understanding the metrics their business users employ to decide if IT is providing value, and linking these metrics and their associated business services to IT infrastructure components. One of the fundamental subsystems necessary to support a BSM strategy is IT asset management (ITAM). The reason is very simple: If you don’t know what you have in your estate, you can’t build and deliver sophisticated service levels. ITAM processes support the collection and provisioning of information about an organization’s IT portfolio. Forrester estimates that about half of large enterprises have implemented ITAM systems and processes to date.<sup>1</sup>

IT organizations need to implement ITAM for many other reasons as well. Enterprise executives, shareholders, and regulatory organizations all require an accurate record of all IT assets for financial controlling, information security, and compliance reasons. An enterprise’s IT estate can often account for 50% of the total enterprise asset base and sometimes as much as 80% of capital expenditure.<sup>2</sup> Each ITAM project usually provides real cost savings for the enterprise — for example, by identifying unused software and hardware assets, more effective life-cycle management, and better IT operations processing through better documentation.<sup>3</sup> A complete ITAM system:

- **Supports the full life cycle of an asset.** This is from planning through to procurement, operations — install/move/add/change — end of life, and disposal.
- **Contains a history of asset characteristics and configurations.** This includes RAM, hard drive space, processors, OS, applications, and file structure.
- **Manages all cost and contract data related to the asset.** This includes changes made throughout an asset’s life within the organization.

And IT organizations with a full ITAM practice in place — meaning an organization, processes, and technology — can successfully support a range of important functions:

- **Procurement management.** This includes providing self-service to business users.

- **Financial management.** This involves recording the true cost of ownership and, ultimately, being equipped to charge back actual costs to business users.
- **Vendor management.** Collating business data and collecting performance data on vendors in a scorecard supports a strategic sourcing strategy.
- **Software license management.** This involves understanding where the licenses are consumed, aggregating costs, identifying potential savings, and ensuring license compliance and software access.
- **Contract management.** This provides a full view of all contract documents through the negotiation phase — allowing reuse in other negotiations — including leasing agreements, service agreements, purchase contracts, and warranty agreements; one of the largest opportunity costs is to find maintenance contracts for assets still under warranty.

So why hasn't everybody implemented ITAM yet? It is a strategic application that requires investment and involvement throughout the IT organization and even on the business side. Most silos in the IT organization already collect the data they need to support their own processes but not others, and the data may not be consistent. It thus requires an element of re-engineering and integration that many firms could not justify in the past 10 years.

### IT Asset Management Is More Than Enterprise Asset Management

Many firms are happy to use their enterprise resource planning (ERP) apps for the bookkeeping/depreciation of IT assets and do not want to invest in ITAM specifically. And ERP vendors like SAP, PeopleSoft, and Lawson include ITAM in their solution scenarios. While integration between ERP and ITAM is certainly important, Forrester believes that a standalone management system for IT professionals is also necessary: ERP and ITAM systems and their users have differing priorities. IT users typically view the asset data through the life cycle of an IT asset, which is much more complex than other enterprise assets. They require configuration and characteristics data that no ERP-based system would be able to maintain at the required granularity. IT asset data collected in ERP solutions concentrates on the financial value of the asset to the organization. It generally reports this information to the general ledger that keeps track of the capitalization and depreciation of the asset through the organization. Accountants usually require a consolidated view of the assets and are rarely interested in the costs of individual IT assets.

### IT Asset Management Is A Foundation For The CMDB — Not The Other Way Round

Some firms think that if they have a configuration management database (CMDB) project running with discovery and configuration items (CIs) feeding into a system, they do not need to implement ITAM. Even most ITAM vendors label their repository a CMDB these days because of the number of budgeted CMDB projects. There is certainly some overlap in the data collected, and both systems use discovery technology. However, the two projects do differ in their focus and application:

- **An ITAM project is about the life cycle of assets.** The system helps ensure that companies are using assets economically.
- **A CMDB project is about relationships.** These relationships are between the assets themselves as well as between the assets and the business services they support. This supports configuration, change, and release management decisions and provides business-centric reporting of service quality.

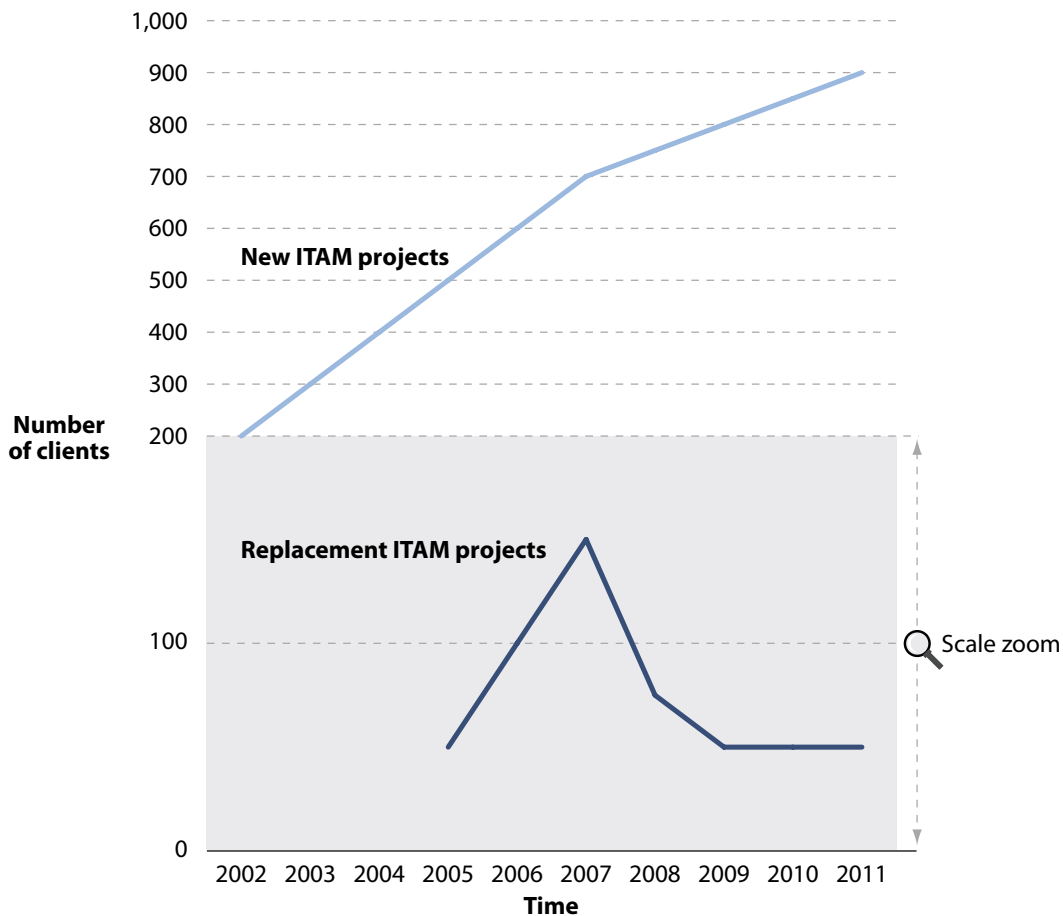
Forrester recommends that firms consider the two projects separately, although it is likely that they can involve the same project team in both projects. Typically, the CMDB will federate to an existing asset management repository; this implies a sequencing of the projects, but this is not always realistic. If the projects are done in parallel, plan this federation to avoid redundancy.

### The Adoption And Evolution Of IT Asset Management

Forrester estimates about that about 50% of \$1 billion-plus enterprises have ITAM projects.<sup>4</sup> Most of these companies have: full-time asset management staff; ITAM processes in place that integrate with other IT processes; and a suite of regular and valuable reports for both IT executives and business executives. However, our conversations with clients indicate that around one-third of these projects were unsuccessful; either they were one-off Y2K exercises that involved manual ITAM data collection that nobody wanted to maintain or the necessary process and organization changes around the ITAM project were unsuccessful. Most ITAM vendors reported that they were finding significant replacement business as well as new business opportunities (see Figure 1).

The ITAM market is now picking up again due to increased interest from users: Drivers for this interest include compliance, cost savings, ITIL, and the desire to achieve business service management.<sup>5</sup> IT service management vendors also want to introduce it as a standalone application to new business customers, hoping that project success will encourage further investments in their product portfolio around the asset management repository — or the CMDB, as they often prefer to call it. The ITAM applications market itself is quite mature, and vendors have had ample time to enhance and refine their offerings. The result is a set of solution choices with similar-looking tools that target one of more of three overlapping market segments; these differ predominantly by:

- **The size and distribution of the IT estate.** Large, geographically dispersed organizations — and particularly those with many remote offices — place greater demands on the ITAM application than those with smaller, localized locations.
- **The number and variety of assets and users being managed.** Management of the IT estate of a medium-size organization with primarily Windows environments is different to that of a much larger enterprise with millions of assets to be recorded among several disparate environments. This places challenges on the discovery technology as well as the solution's scalability.

**Figure 1** Estimated ITAM Market Adoption

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Source: Forrester Research, Inc.

- **The complexity of the required workflows and reports.** An enterprise culture that is already very mature, with industry-strength processes and metrics, places greater requirements on the ITAM system and its implementation.

## ITAM APPLICATIONS EVALUATION OVERVIEW

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

### Evaluation Criteria Target Usability And Integration

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria (see Figure 2). We evaluated vendors against 43 criteria, which we grouped into three high-level buckets:

**Figure 2** Evaluation Criteria

CURRENT OFFERING	
Architecture	Is the product designed to ensure stability, performance, and scalability?
Usability and complexity	Is the product structured for implementation and for different types of users?
Financial management	What is its ability to account for assets?
Contract management	What is the range of contract management functionality?
Inventory management	What is the range of inventory management functionality?
License management	What is the extent of license management functionality?
Procurement management	What is the extent of procurement management functionality?
Standards and interoperability	Does it support vendor-neutral standards and/or third-party products?
STRATEGY	
Product vision	What is the company's product vision for the service management market? What is the degree of focus within the company on systems management?
Sales and implementation strategy	What is the sales strategy? Is this strategy credible and successful?
Geographic presence	How does the company promote and sell its products around the world?
Cost	How is the product priced?
MARKET PRESENCE	
Installed base	How large is the installed base of customers for this product?
Employee base	How many people does the organization dedicate to this product?
Financials	What is the company's cash position?

Source: Forrester Research, Inc.

- **Current offering.** As a framework for the evaluation, we looked at several areas of functionality — financial, contract, inventory, license, and procurement management — as well as reporting capabilities. We also considered product architecture, usability — including language localization — and the ability to integrate with other service management and ERP systems.
- **Strategy.** We reviewed each vendor's strategies, target markets, and approach — including planned and future releases, sales and implementation strategies, technology and channel partnerships, geographic presence, and costs.

- **Market presence.** We assessed each vendor's financials, installed base, and staff size and structure.

### Evaluated Vendors

Forrester included 10 vendors in the assessment: Altiris, BMC Software, CA, Centennial Software, HP, MRO Software, Provance Technologies, PS'SOFT, REALTECH, and USU. Each of these vendors is:

- **In the mind of Forrester clients.** All of the vendors included in the assessment were the subject of client inquiries, product assessments, or consulting engagements. Our clients told us who we needed to evaluate.
- **Actively marketing ITAM applications.** We also heard reports of other products that Forrester clients use to manage IT assets. ERP solutions are discussed above, and we did not include them in this evaluation.

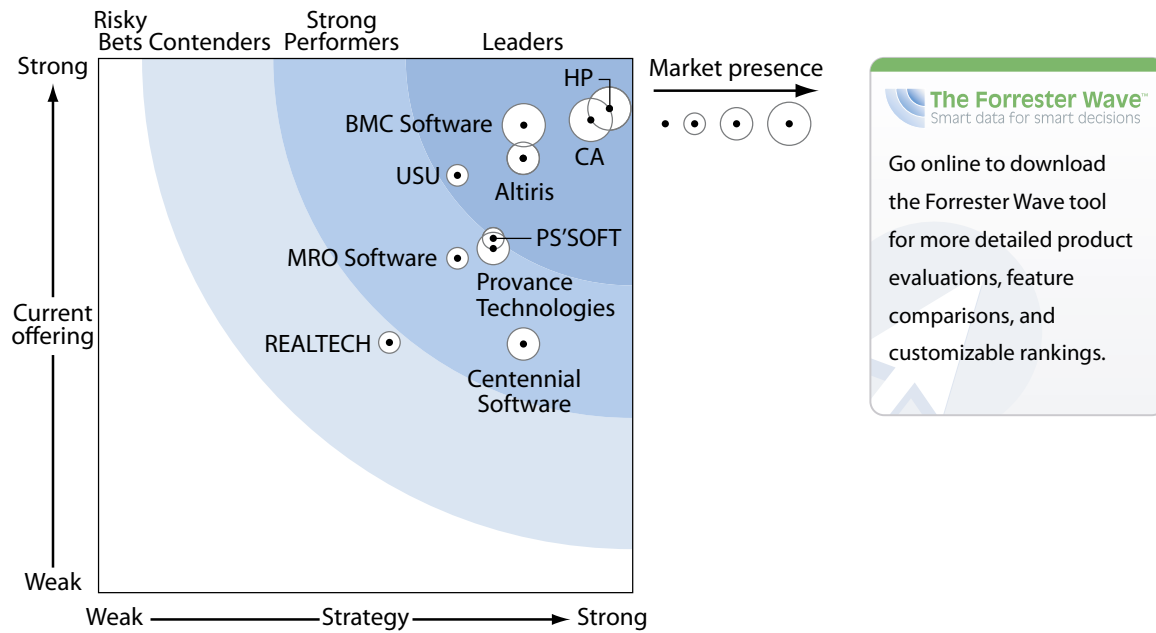
### ALL VENDORS ARE MATURE BUT MUST ALWAYS FIT INTO AN EXISTING ENVIRONMENT

The most important criteria when selecting an ITAM application solution is the ability to integrate into existing systems and data sources and this will depend on the specific configurations. When considering a larger number of criteria, the evaluation uncovered a market served by (see Figure 3):

- **Industrial-strength enterprise solutions.** BMC's Remedy Asset Management, CA's CA IT Asset Management, and HP's OpenView Asset Center lead the pack. Industrial-strength tool suites with proven track records in enterprises characterize these solutions. Out-of-the-box configuration options also make them appropriate for smaller organizations that require robust tools to manage their needs. Altiris' Asset Management Suite is also rich in functionality but focuses on medium-size companies.
- **Alternative solutions for enterprises and mid-tier firms** As well as Altiris, USU's Valuation, MRO Software's Maximo ITAM, and PS'SOFT's QP: Asset Management Suite are competitive options for medium-size organizations and/or those with less demanding workflow or scalability requirements. Provance Technologies' Provance software also addresses this segment but via service providers — its primary target.
- **Smaller solutions for special needs.** Centennial's Discovery 2005 and REALTECH's theGuard! ServiceCenter are capable tools but only for specific environments. Centennial provides strong inventory capabilities but needs to integrate with another asset management system — such as an enterprise asset management system. REALTECH's solution is most interesting for committed SAP R/3 customers that prefer the SAP integration provided rather than more extensive ITAM functionality.

This evaluation of the ITAM applications 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 3** Forrester Wave™: IT Asset Management, Q3 2006



**The Forrester Wave™**  
Smart data for smart decisions

Go online to download the Forrester Wave tool for more detailed product evaluations, feature comparisons, and customizable rankings.

Source: Forrester Research, Inc.

**Figure 3** Forrester Wave™: IT Asset Management, Q3 2006 (cont.)

	Forrester's Weighting	Altiris	BMC Software	CA	Centennial Software	MRO Software	HP	Provance Technologies	PSSOFT	REALTECH	USU
<b>CURRENT OFFERING</b>	50%	4.15	4.46	4.51	2.36	3.23	4.62	3.28	3.38	2.39	3.99
Architecture	5%	3.50	4.90	4.70	3.60	3.80	4.80	3.10	3.70	2.40	4.40
Usability and complexity	15%	4.60	4.60	4.40	2.20	3.60	4.60	2.40	3.20	2.60	3.00
Financial management	20%	3.35	4.05	5.00	1.50	3.30	4.90	4.00	3.30	1.75	4.35
Contract management	15%	4.20	4.20	4.90	1.00	3.10	4.50	4.60	4.00	2.40	4.60
Inventory management	15%	4.90	4.70	4.50	5.00	3.00	4.70	3.00	3.00	4.10	4.10
License management	15%	4.30	4.75	4.45	3.35	2.80	4.30	2.05	3.35	1.45	3.50
Procurement management	10%	4.20	4.70	3.35	1.00	3.35	4.85	3.20	3.35	1.85	4.15
Standards and interoperability	5%	3.65	4.00	4.00	1.00	3.30	4.00	4.00	3.35	3.00	4.00
<b>STRATEGY</b>	50%	4.00	4.00	4.65	4.00	3.35	4.83	3.70	3.70	2.70	3.35
Product vision	35%	4.00	5.00	5.00	4.00	4.00	5.00	4.00	4.00	3.00	4.00
Sales/implementation strategy	35%	4.00	3.00	4.00	4.00	3.00	4.50	4.00	4.00	3.00	3.00
Geographic presence	30%	4.00	4.00	5.00	4.00	3.00	5.00	3.00	3.00	2.00	3.00
Cost	0%	5.00	4.00	5.00	5.00	4.00	4.00	3.00	3.00	4.00	4.00
<b>MARKET PRESENCE</b>	0%	3.35	4.15	4.65	3.70	2.65	4.65	3.35	3.00	2.30	2.30
Installed base	35%	4.00	4.00	5.00	5.00	1.00	4.00	4.00	3.00	2.00	2.00
Employee Base	35%	3.00	4.00	4.00	3.00	4.00	5.00	3.00	3.00	2.00	2.00
Financials	30%	3.00	4.50	5.00	3.00	3.00	5.00	3.00	3.00	3.00	3.00

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

Source: Forrester Research, Inc.

## VENDOR PROFILES

### Leaders

- **HP.** Earlier this year, HP acquired Peregrine Systems, one of the most experienced ITAM vendors in the market and with a significant installed base. In future years, HP OpenView customers will likely take advantage of the new offering for their ITAM projects. Current Peregrine Systems customers will see greater corporate stability and a broader set of offerings.<sup>6</sup>
- **CA.** Comprised of Unicenter Asset Portfolio Management, Unicenter Asset Management, and Unicenter Asset Intelligence, CA IT Asset Management is a natural fit for organizations with a commitment to CA's enterprise management tools. However, companies considering a

standalone offering capable of supporting the needs of large and complex organizations should also consider CA. The r11 solution suite is one of the most modern of all the solutions we evaluated.<sup>7</sup>

- **BMC Software.** BMC Software has integrated Remedy Asset Management into its Atrium suite, sharing the underlying configuration management database (CMDB) among all components of the Atrium line that have been developed in Remedy's Action Request language. Functionally as strong as the leaders, BMC Software is currently initiating changes in its go-to-market strategy and sales force to better address its target market.<sup>8</sup>
- **Altiris.** Altiris, a rapidly growing player in the asset and systems management market, offers a full-featured asset management solution in conjunction with the company's service management and life-cycle tools. The packaging of asset management with other functions, such as service desk, makes this offering something of a stealth product in the ITAM market. It is a good fit for Windows-centric organizations.<sup>9</sup>
- **USU.** This German software company has an established reputation for its Valuation solution in Europe, where it is a considered contender to the leaders — even for large organizations. It specifically addresses the financial management needs of IT organizations but also offers several other service management modules.<sup>10</sup>

### Strong Performers

- **PS'SOFT.** This privately owned French software company has an established installed base of medium-size companies in EMEA; it has now entered the US market with a new sales organization, leveraging a recent injection of venture capital. QP: Asset Management is part of a greater suite of service management solutions.<sup>11</sup>
- **Provance Technologies.** Provance Technologies mainly sells its ITAM solution to service providers. ITAM as a service is becoming an interesting proposition for companies that do not want to make their own investment and staffing decisions.<sup>12</sup> The provider then resells the solution to its clients, making it quite a widespread solution.<sup>13</sup>
- **MRO Software.** This vendor is an expert in facilities and ITAM and is therefore quite different from the other IT service management-focused vendors in this evaluation. It is an interesting option for companies that have broader asset management needs.<sup>14</sup>
- **Centennial Software.** This vendor primarily focuses on working with other software providers in an OEM arrangement, where the other vendor incorporates Centennial's Discovery 2005 functionality into a greater offering. Therefore, it doesn't cover several areas of ITAM functionality. However, Centennial's sales strategy and market presence is significant due to its OEM relationships with companies like Symantec and MRO Software.<sup>15</sup>

## Contenders

- **REALTECH.** The company specializes in providing service management products to the large installed base of SAP customers, with strong integration to those ERP modules. It has some significant large customers using this scenario in Europe.<sup>16</sup>

## SUPPLEMENTAL MATERIAL

### Online Resource

The online version of Figure 3 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.
- **Product demos.** We asked vendors to conduct demonstrations of their product's functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with some of the 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 lab evaluations, 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

- <sup>1</sup> Forrester has identified the most common stages of a business service management (BSM) strategy and the varying stages of adoption for each stage and technology: IT asset management; ITIL processes; service-level management; auto-discovery and the CMDB; and business process mapping. See the April 18, 2006, Trends “[Implementing BSM.](#)”
- <sup>2</sup> These numbers are based on assessments from client inquiries and other anecdotal evidence. IT is an integral part of many companies’ business investments these days, particularly in the financial services and telecommunications sectors.
- <sup>3</sup> Asset management is a challenging concept to justify. When justifying asset management, it’s tempting to show how the investment will be quickly recouped. But, as is often the case, when the initial cost takeout comes up short, support for asset management will likely decline sharply. Choosing a scenario in which asset management “pays for itself” sets the wrong expectation and will potentially doom the program before it starts. Position asset management similarly to accounting: as a technology metrics function that is capable of yielding information that supports tactical decision-making and, more importantly, as a function that sheds light on the strategic optimal application of technology through properly derived metrics. With millions of dollars invested in IT and with corporate growth, shareholder value, and ongoing profitability riding on that investment, operating without a definitive measurement system is inconceivable. See the November 23, 2005, Best Practices “[Justifying IT Asset Management.](#)”
- <sup>4</sup> There are approximately 4,700 \$1 billion-plus firms globally.
- <sup>5</sup> The first IT infrastructure library (ITIL) documents were first published in 1992 by an agency of the UK government for their use in the public sector. The library contained books of guidance on the processes within IT service management and covered help desk plus problem, change, service level and configuration management, based on a best practices approach.
- <sup>6</sup> View the vendor summary for more detailed analysis on how HP/Peregrine Systems fared in this evaluation. See the August August 4, 2006, 2006, Tech Choices “[HP, Now With Peregrine Muscle, Packs A Powerful IT Asset Management Punch.](#)”
- <sup>7</sup> View the vendor summary for more detailed analysis on how CA fared in this evaluation. See the August August 4, 2006, 2006, Tech Choices “[CA Is The Natural ITAM Choice For More Than Just CA-Centric Environments.](#)”

- <sup>8</sup> View the vendor summary for more detailed analysis on how BMC Software fared in this evaluation. See the August August 4, 2006, 2006, Tech Choices “[BMC Software Is A Serious Contender For The IT Asset Management Crown.](#)”
- <sup>9</sup> View the vendor summary for more detailed analysis on how Altiris fared in this evaluation. See the August August 4, 2006, 2006, Tech Choices “[Altiris Leads The Middle Ground With A Stealth IT Asset Management Product.](#)”
- <sup>10</sup> View the vendor summary for more detailed analysis on how USU fared in this evaluation. See the August August 4, 2006, 2006, Tech Choices “[USU Offers A Perfect Product For Medium-Size IT Asset Management Deployments In Europe.](#)”
- <sup>11</sup> View the vendor summary for more detailed analysis on how PS’SOFTE fared in this evaluation See the August August 4, 2006, 2006, Tech Choices “[PS’SOFTE Shifts Its Medium-Size ITAM Suite From EMEA-Centricity To Global Affinity.](#)”
- <sup>12</sup> Service providers, hardware manufacturers, and leasing providers will provide asset management as a service to organizations that have specific pain points, including regulatory, outsourcing, and merger and acquisition initiatives. Software vendors and first-generation managed service providers (MSPs) will focus on the technical, largely discoverable components of IT asset management (ITAM) to IT, but services providers will focus on the operation and business-oriented projects that have been missed, using an MSP delivery model. Why? Service providers have relationships with the business — and software providers don’t. Vendors such as BMC Software and Peregrine Systems will increasingly partner with service providers to sell software as a service to line-of-business (LOB) executives in need of accurate ITAM data. See the June 6, 2005, Trends “[It’s Time To Give IT Asset Management MSPs Another Look.](#)”
- <sup>13</sup> View the vendor summary for more detailed analysis on how Provance Technologies fared in this evaluation. See the August August 4, 2006, 2006, Tech Choices “[Provance Technologies’ Service Provider Approach Allows For Hassle-Free ITAM.](#)”
- <sup>14</sup> View the vendor summary for more detailed analysis on how MRO Software fared in this evaluation. See the August August 4, 2006, 2006, Tech Choices “[MRO Software’s IT Asset Management Solution Juggles Facilities And IT Assets.](#)”
- <sup>15</sup> View the vendor summary for more detailed analysis on how Centennial Software fared in this evaluation. See the August August 4, 2006, 2006, Tech Choices “[Centennial Software Casts A Wide Net With A Specialized OEM ITAM Solution.](#)”
- <sup>16</sup> View the vendor summary for more detailed analysis on how REALTECH fared in this evaluation. See the August August 4, 2006, 2006, Tech Choices “[REALTECH Is The Real McCoy For Specialized ITAM-SAP Integration.](#)”

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