

June 12, 2023



BEST PRACTICES

The Evolution of Unified Software Services

A More Holistic and Effective Model for Managing IT
and Realizing Digital Transformation



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Produced exclusively for Constellation Research clients

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EXECUTIVE SUMMARY

This report explores the ongoing evolution of the advanced edge of modern third-party IT services toward a model known as unified software services (USS).

Those looking for the latest strategies for optimizing how they can rapidly realize business value with IT, reduce costs, and increase the success of IT evolution and digital transformation can use this report as a guide to evaluate whether USS is the right choice for delivering and managing their IT solutions.

BUSINESS THEMES



New C-Suite



Technology
Optimization

UNIFIED SOFTWARE SERVICES: AN INTRODUCTION FOR CIOs AND IT EXECs

Today's sophisticated IT infrastructures have become primary facilitators of the functioning and growth of most businesses, often constituting the essential foundation of the business itself. Yet the march of global technological progress has continued to ensure that the IT landscape in most organizations has reached an unparalleled level of complexity, which only continues to climb. The resulting technological infrastructure is increasingly expensive and resource-heavy to maintain, with the vast majority of IT budgets going to support it rather than toward innovation. However, keeping up with ongoing technological advancements also is essential, particularly in the critical process of digital transformation that is vital for unlocking the future potential of business and IT. In essence, technology now serves as a central capability to address many of the most important opportunities and challenges in today's digital-centric world.

Yet this complex environment often means that an organization's IT landscape is burdened with literally hundreds of tech solutions; data silos; and the operational overhead of keeping it all integrated, secure, optimized, managed, supported, and evolving as it should. In fact, a recent survey of CIOs¹ reported that complexity was one of the top two major challenges across all of IT today. Furthermore, 48% of organizations are also looking to outsource support and maintenance services to free up their IT teams to work on more strategic, innovation-focused projects.²

To get a better handle on this burgeoning IT landscape, enterprises have continued increasing their use of external third-party services—at a rate of about 7% per year, according to Constellation Research estimates. These services have steadily evolved and grown to help organizations realize, improve, streamline, and simplify IT. Areas that have been particularly ripe for external enablement include a wide range of important functions such as cybersecurity, IT support, managed services, and other IT-related professional services. More recently, even major activities such as digital transformation have become a key area of focus in this regard. That's because external organizations

can capture and then deliver numerous strategic lessons learned across many customers while better tapping into economies of scale.

However, as enterprises grow, they require ever-improved enablement, more-integrated systems, better access to data in various IT systems, steady additions of important new functionality, and additional automation. This has led IT organizations to consume a profusion of different enterprise services to realize all the needed benefits and improvements.

But each new service provider an enterprise engages requires onboarding, vendor management, and investment in effort and time to help its services work with all the other services to meet the needs of IT. With so many third-party IT services being consumed, just managing them all becomes a significant activity.

Urgency in deploying IT to meet shifting needs and operating conditions is near an all-time high. Organizations are requiring much more rapid and pervasive digital change. In a CIO survey conducted by Constellation Research, 94% of the participating CIOs³ reported that they are under “high” or “very high” pressure to move faster in delivering value with IT. They are finding that the market is changing swiftly and that to evolve and prosper, they simply require faster, better access to better-coordinated enterprise services at a scale that enables them to move rapidly.

There is also a significant talent/staffing shortage, with most CIOs today reporting shortages of available workers with critical IT skills ranging from operations to cybersecurity. There simply is not enough staff with the necessary skills, combined with a need to shift internal experts to transformational or growth projects and away from managing the application portfolio.

In 2023, CIOs reported⁴ that where they spend most of their time now is in the following activities:

- Security management (47%)
- Improving IT operations and performance (40%)
- Aligning IT initiatives with business goals (38%)

- Modernizing infrastructure and applications (35%)
- Cultivating the IT/business partnership (31%)
- Leading change efforts (28%)
- Cost control/expense management (28%)
- Managing IT crises (26%)

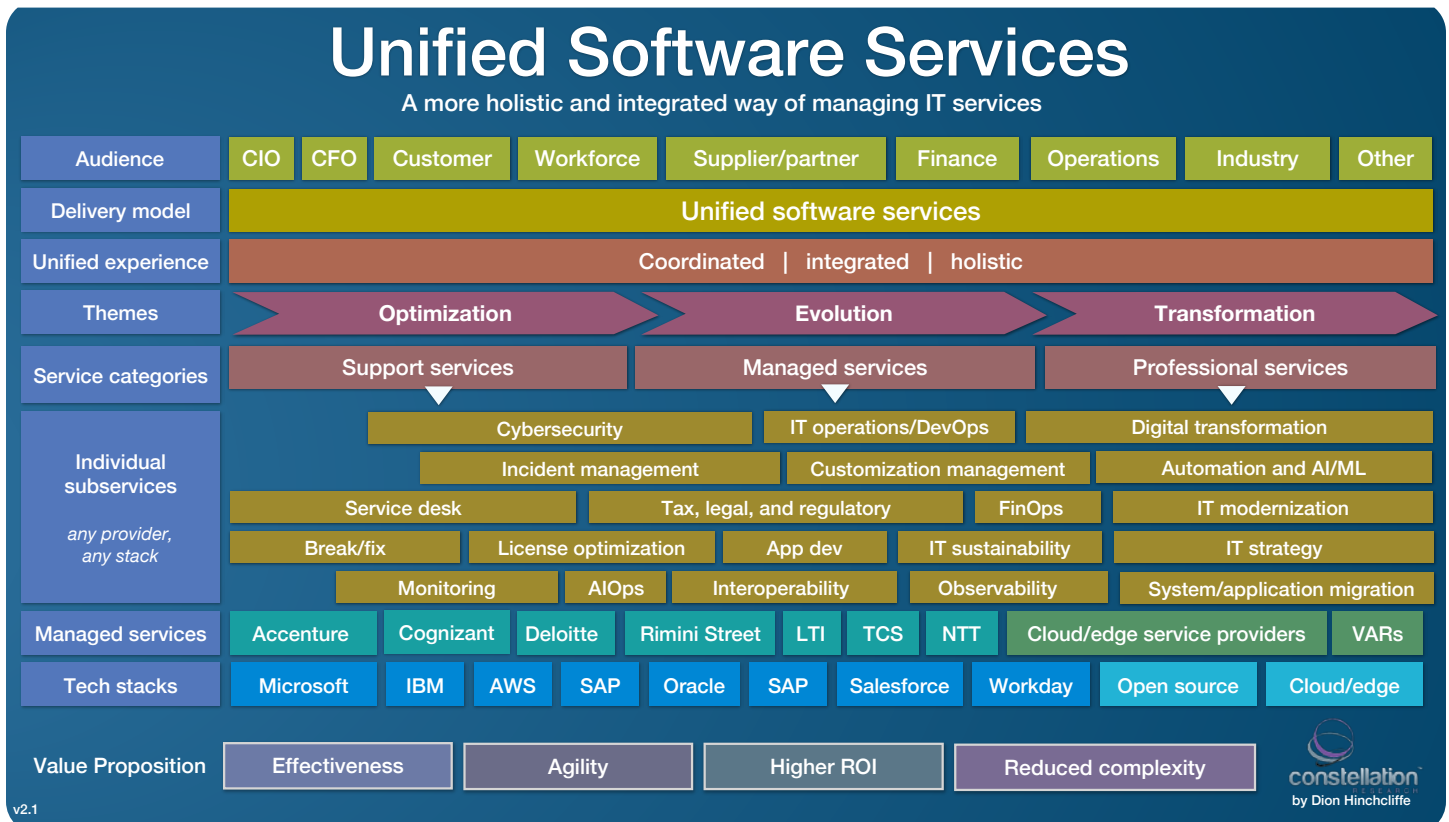
The majority of these primary activities are strong candidates for sourcing to third-party IT services this year as costs and talent availability remain top concerns, along with stubborn delivery backlogs and lack of bench experience with important emerging tech.

Now the IT services industry has settled organically—via numerous experiments in integrating and repackaging their services—on a new strategic approach. This has given rise to a more seamlessly integrated model: USS. This important new model enables enterprises to engage service providers in a more encompassing and holistic manner. USS typically involves trusted long-term service providers that have intimate knowledge of a company’s IT landscape, application portfolio, and stakeholders or from a fresh master provider equipped with the ideal blend of capabilities and partners. No matter the source, embracing USS delivers a rich and expansive array of services that is carefully interwoven; customized; integrally managed; and generally more effective in multiple dimensions, including cost, agility, and governance (see Figure 1).

A USS provider offers a more end-to-end and long-term services strategy that can be used for everything from basic security and support to IT modernization, asset management, application lifecycle management, and even—or especially—digital transformation.

The principal insight is that a USS offering can provide a better-integrated solution to meet an organization’s services needs. USS can readily encompass many or most of an organization’s core IT management needs, with less ramp-up time; less effort building trust; and less time required to learn

Figure 1. The Elements of Modern Integrated IT Services Delivery



Source: Constellation Research

the IT landscape, become familiar with stakeholders, get up to speed on the corporate culture, and understand requirements and sensitivities. A key reason is the wider bench of talent that unified services teams typically possess, with more experience in integrated service offerings, including the level of applications and technical knowledge, combined with an intimate understanding across a client’s business processes that informs all the services provided.

Consuming USS is also a more streamlined approach and generally less difficult than “mushing together” a variety of different providers’ solutions and then getting the various providers to work together successfully to coordinate and better integrate their services.

Getting the Most From USS: Bringing Together Optimization, Evolution/Modernization, and Transformation

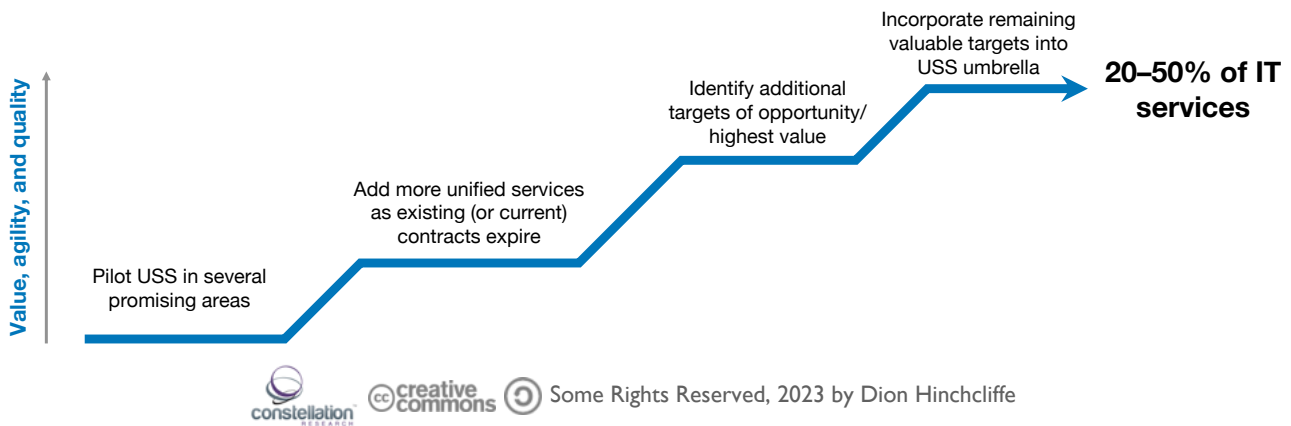
Organizations can leverage USS as a lens through which to understand a more coordinated, efficient, and effective approach to delivering the business value of IT. USS can achieve better economies of scale, more-seamless services, and shorter time to value by bringing together infrastructure services such as security with support services, managed services, and professional services.

Shifting to USS can be on a continuum and ramped up over time; it does not have to be conducted as a big-bang effort. Enterprises can migrate to USS over several years to minimize disruption, age out legacy contracts, and move with the most confidence. Figure 2 shows a typical adoption curve.

USS is best employed by CIOs and IT leaders to improve the trajectories of their enterprise software architecture; reduce risk; optimize spend; modernize systems; and move more quickly to realize IT projects, especially ones with high business priority. In addition to the business outcomes desired, a primary result for IT typically is a strategic blueprint of their enterprise software vision, along with a

Figure 2. Using More Unified Software Services Over Time to Capture Value and Efficiencies

Incremental Adoption of Unified Software Services



Source: Constellation Research

close operational strategic partner to help them get there with a high-touch service experience that optimizes and transforms the current software portfolio.

It can also be a key advantage to employ a USS provider that is not a software vendor and so doesn't have lucrative partnerships with such vendors; you can get objective, vendor-neutral, and technology-agnostic guidance for a heterogeneous business-driven enterprise software vision.

Finally, USS can also help strategically evolve IT to more rapidly improve business performance and to transform the business with new solutions and entirely new ways of enabling the business with technology by tapping a provider's previous experiences. These are typically captured in informed frameworks, roadmaps, and solutions that directly address the needs of and realize the possibilities inherent in a more holistic IT estate.

THE PATH TO UNIFIED SOFTWARE SERVICES

CIOs and IT leaders who want to more symmetrically extend the lifespan of existing software investments, modernize enterprise applications, and deliver strategic initiatives for business innovation and growth can begin to shift their services portfolio more intentionally toward a USS offering that best meets their needs (see Figure 3).

Figure 3. The Path Toward a More Unified Model for IT Services

How to Shift to Unified Software Services



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Source: Constellation Research

Here are the key factors for finding and matching with an ideal USS offering:

- Quality of offering across the desired services spectrum
- Availability of talent/capacity in the targeted integrated services
- Consideration of well-regarded existing vendors that have a USS portfolio, especially ones that are agnostic and independent of vendor influences
- Sufficient client references for a provider's USS offering
- A compelling value proposition/cost profile over a customer-integrated offering
- Demonstrated lower risk and higher success of IT efforts than using a technology vendor's USS capabilities

Organizations can then use these factors in the following process to move to a USS model:

- **Develop a migration plan that is prioritized to achieve business needs and goals.** Weigh major upcoming modernization and transformation efforts; map their dependencies; and sort them according to risk/cost and other factors, such as whether decisions for one solution may unexpectedly or unavoidably impact other solutions.
- **Evaluate USS providers, perform due diligence, compare, and select.** Work with Procurement to structure an agile evaluation and acceptance process. Ensure that the cost/benefit (or value) model is an improvement over the pre-USS environment.
- **Identify primary candidates for USS delivery in the IT portfolio along with key outcomes in the near term for a multiphase shift to USS.** Make sure your chosen candidates are broad enough to gain benefits from the USS model. Candidates can be IT modernization efforts or specific digital transformation goals or can be more tactical, such as optimizing licensing, improving end user support, or systemically strengthening cybersecurity. Another strong candidate may be existing IT deployments in which siloed or multiple overlapping service teams are hampering support. Ensure

that these initial efforts are successful, and evaluate the USS provider's efforts via a scorecard methodology; the key is that coordination is necessary to streamline services, reduce duplication, increase cohesion, and ensure effective outcomes.

If the primary process is evaluated as a USS success, a CIO can then stage and proceed with the rest of the multiphase plan to move to USS for all services.

KEY TAKEAWAYS FOR UNIFIED SOFTWARE SERVICES

In a world where technology is infusing every part of a business and the IT supply chain is more complex than ever, USS is the most evolved current model of enterprise software services. It brings together IT evolution and business transformation; streamlines and better coordinates them; and ensures that they are more consistent, efficient, and less siloed—often at a lower cost.

Organizations that deliberately adopt USS gain the numerous benefits described here, from cost savings to agility and time to value. But perhaps the most important strategic benefit is a reduction in overall complexity. When IT is less complex to evolve, manage, and govern, the path to the future is significantly easier to travel. Constellation Research finds that organizations that adopt USS tend to have higher maturity and a more sophisticated operating model that eschews disconnected efforts in favor of more-overarching plans. That's not to say USS is an overcentralized model. Instead, it knits together services in a way that is designed to enable agility and proactive change.

In today's as-a-service world, which is increasingly plug-and-play and integrated on demand, there is less risk of dependency and lock-in with any larger-scale enterprise services model, thanks to the easier swappability and richer mix-and-match possibilities the as-a-service model provides. Constellation Research finds that the USS model is therefore significantly more appealing than in the past, when such dependencies might have been of concern.

The downside of USS, if there is one, is still potentially excess reliance on a single vendor to achieve economies of scale and a reduction in supplier chaos. USS is not intended as a universal replacement

for IT services but is meant for wider and broader orchestration of services that have a lot of interdependencies, especially in areas that need rapid change or large improvement.

Constellation Research recommends that IT departments consider the benefits outlined in this report and begin consolidating a portion of USS in their mix of overall IT services. Most organizations can benefit from a shift to USS of between 20% and 50% of their IT services to gain a sufficient number of the evident rewards.

In 2023 it's recommended that organizations use USS to advance their vital emerging technology agendas such as with AI and advanced cybersecurity while using the talent cushion and cost mitigations USS can provide as a way to hedge talent issues as well as reduce expenditures and control spend.

In the end, most organizations will have to determine a path forward for streamlining the services they consume as IT takes a growing proportion of enterprise spend. Technology proliferation is not the problem. Instead, it's how value and growth are created, if managed and governed well. USS offers the most mature current path to not just optimizing how IT is delivered, managed, and supported but also to transforming IT and the business for the future.

ADDENDUM FOR 2023: LATEST TRENDS IN UNIFIED SOFTWARE SERVICES

Since the original version of this report was authored, several important new developments have emerged to make USS even more attractive as an integrating and holistic function that can have an overall synergistic effect on net-new IT efficiencies. These trends capitalize on a more unified service model to ensure that new means of value capture and realization are more consistently delivered across the IT organization.

Financial Operations

USS can aid in a more consistent approach to financial operations (FinOps) for cloud spend management across an IT organization, primarily by being in a strong position to foster better cost efficiency and resource optimization across an organization's full portfolio of cloud-based services. By standardizing policies, practices, and tools for cloud cost management, organizations can effectively track, analyze, and allocate resources, thus minimizing waste and maximizing the return on investment. Furthermore, a more uniform approach promotes accountability among various teams, because they can clearly understand the cost implications of their decisions and align their actions with the organization's financial objectives.

Another advantage of a consistent FinOps approach using the USS model is improved collaboration and communication across different departments, projects, and service providers within the IT organization. By breaking down silos and encouraging transparency, teams can identify cost-saving opportunities and work together to achieve optimal resource usage. In addition, this consistency ensures that more stakeholders are on the same page, making it easier to implement changes and respond to fluctuating business needs. Ultimately, USS can be a strong delivery model for FinOps to more quickly and consistently empower IT organizations to make data-driven spend decisions, enhance operational efficiency, and better support long-term investment in IT.

Sustainability and Environmental, Social, and Governance Initiatives

USS can play a key role in supporting sustainability and environmental, social, and governance (ESG) initiatives within an IT organization. By coordinating and aligning an IT department's efforts with these objectives across projects, teams, and service organizations, USS adopters can significantly contribute to reducing the IT department's environmental footprint, fostering higher social responsibility, and promoting ethical governance. Because this typically entails implementing energy-efficient hardware and infrastructure, adopting cloud solutions that minimize resource consumption and promoting the use of green technologies such as renewable energy sources can be better

coordinated and aligned across a broader swath of IT. Furthermore, IT departments can use the USS model to develop and maintain systems across their project and service provider portfolios that help monitor and report on sustainability metrics, enabling IT departments to more consistently track their progress and identify areas for improvement.

USS creates better collaboration across IT projects and service providers and is a strong vehicle for driving ESG initiatives. By working closely with stakeholders across these purviews, IT professionals can ensure that digital solutions from their suppliers and partners support broader sustainability goals. USS can also help manage partnering with other departments such as Human Resources or Procurement to promote remote IT worker/contractor policies that reduce the need for commuting or collaborating with internal supply chain teams and those of service providers to operate systems that prioritize ethical sourcing and minimize waste. In essence, IT departments can use USS to be proactive in understanding the organization's ESG objectives and then leveraging the model to better activate and deploy the USS team's technical expertise to create innovative solutions that contribute to a more sustainable and responsible future.

Industry Clouds

Industry clouds have emerged as powerful tools that enable IT departments to deliver on digital modernization and Industry 4.0 more rapidly and effectively. These specialized cloud solutions—such as PwC's cloud offerings for banking, insurance, and energy/utilities⁵—are tailored to the unique requirements and challenges of specific industries, such as healthcare, financial services, or manufacturing. By offering prebuilt industry-specific applications, features, and integrations using an ecosystem of service partners, industry clouds enable IT departments to quickly deploy and customize solutions that cater to the distinct needs of their organization. Because solutions such as PwC's incorporate a unified network of integrated service providers, this accelerates the digital transformation process: Companies can readily adopt cutting-edge technologies and processes without having to build them from scratch or take the lengthy time required to vet and integrate their own network of providers. Additionally, industry clouds using a USS approach can facilitate seamless

collaboration and data sharing among partner stakeholders within the industry ecosystem, driving innovation, shorter cycle times, and agility and enhancing productivity.

Another key advantage of industry clouds with USS is that those adopting the approach can inherently address critical regulatory and compliance issues unique to each sector. This enables IT departments to focus on driving innovation and value across their organization and service provider ecosystem, rather than being bogged down by the complexities of complying with industry-specific regulations across a large supplier/service provider network. Moreover, because industry clouds are built on the foundations of the latest cloud technologies, they inherently possess the scalability, flexibility, and agility needed to support the rapid pace of digital modernization and Industry 4.0. Consequently, organizations can more efficiently use a USS model to wield USS-ready industry clouds to meet rapidly evolving market demands, capitalize on new opportunities, and stay competitive in an increasingly digital and interconnected world.

Nearshoring

As managing economic uncertainty becomes a higher priority in 2023, IT organizations are looking at nearshoring to maintain the advantages of sourcing to external providers, but without the communication and collaboration difficulties of having providers in a faraway time zone. For example, South America has become particularly attractive to U.S. companies in the last year for talent that comes at a lower cost but from essentially the same time zone. Thus, USS can be used as a way to more consistently manage the shift to nearshoring.

A USS approach can significantly enhance the consistency of nearshoring across an IT services portfolio. The USS model can serve as a centralized hub for best practices, centralized coordination, and the development of a more consistent shift to nearshoring across the portfolio that's tailored to the organization's needs. By employing the USS approach, companies can also ensure that their nearshored IT resources adhere to a common set of standards, processes, and methodologies, thereby maintaining quality and performance across the entire IT services portfolio. Furthermore, the USS model facilitates knowledge sharing, collaboration, and continuous improvement among nearshored

teams, enabling them to stay abreast of and in harmony with the organization's overall modernization and transformation plans and needs.

Cloud Adoption for Capex Avoidance

Organizations can use the USS model to more effectively and systematically widen cloud adoption across their IT portfolio, including service providers, as a means of capital expenditure (capex) avoidance, although the risk of unbudgeted, unanticipated cloud cost increases can make this strategy challenging. They can achieve this by shifting their spending from upfront investments in new hardware, software, and infrastructure to a more flexible and elastic pay-as-you-go model. Instead of incurring significant capital costs for purchasing and maintaining on-premises equipment, organizations can opt for cloud-based solutions that convert these expenses into operational expenditures (opex) while still preserving most or all of their existing software investments.

This approach not only alleviates the financial burden of substantial upfront investments but also provides increased scalability and agility, and USS ensures a broad adoption of the strategy across the portfolio. Organizations can then more rapidly adapt to changing business requirements by adjusting their cloud resources and services on demand, without being locked into long-term commitments or facing costly infrastructure upgrades. Consequently, this strategy empowers IT departments to optimize costs, streamline resource allocation, and focus on strategic initiatives that drive innovation and business growth.

AI Adoption

In 2023 artificial intelligence (AI) has resurfaced as one of the most interesting emerging technologies with disruptive potential. Consequently, interest in and adoption of AI have surged in enterprises. Now CIOs want to get their arms around the capabilities at an enterprisewide level to create a more consistent, cost-managed, and coordinated centralized deployment that ensures that AI models are aligned across the organization, models that are especially expensive to run get identified and then get the efficiency fixes they need, bias is systematically removed, and compliance is consistently

achieved. USS can help better provide cross-project, cross-portfolio AI compliance, governance, and operations, especially when combined with the popular ModelOps⁶ approach used to deploy AI across an organization in a coordinated manner.

Managing the Continued Shortfall of Critical Talent

Even with the wide tech company layoffs in 2023, the most in-demand IT talent often remains either unavailable or unaffordable. IT outsourcing using the USS model can be a potent and scalable solution for organizations facing a shortfall of employee talent in the IT department. According to Constellation Research findings, 65% of organizations outsource their IT services to supplement their in-house resources, and this trend is expected to continue to grow, as cited earlier in this report. By outsourcing hard-to-staff in-demand IT functions such as AI architecture, cloud management, and cybersecurity, organizations can access a wider pool of specialized talent and benefit from the expertise of experienced service providers. USS can help organizations scale more quickly, reduce costs, and stay up to date with the latest technologies, without the need to hire and train additional staff internally. Additionally, cross-portfolio outsourcing can provide flexibility in managing fluctuating workloads, enabling organizations to ramp resources up or down across projects and portfolios as needed to meet business demands.

CONSTELLATION'S RESEARCH ADVISORY BOARD

External contributions to this report were provided by vendor and end user members of Constellation's Research Advisory Board, who, in this case, were:

Stephen diFilipo, well-known serial CIO and IT thinker

Walt Carter, chief information officer and chief digital officer, Homestar Financial

Isaac Sacolick, former CIO of McGraw Hill

ENDNOTES

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Dion Hinchcliffe is an internationally recognized digital thought leader, industry analyst, business strategist, enterprise architect, transformation consultant, and keynote speaker. He is widely regarded as one of the most influential figures in enterprise IT.

Currently a VP and principal analyst of Constellation Research, Hinchcliffe is a well-known industry expert on the topics of digital transformation, CIO issues, digital workplace, ecosystem strategy, digital business, and next-generation enterprises. His thought leadership can be found on *ZDNet*, *ebizQ*, *On Digital Strategy*, and *Enterprise Irregulars*. He is co-author of the bestselling *Social Business by Design* (John Wiley & Sons).

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- Founders of Constellation Executive Network, a membership organization for digital leaders seeking to learn from market leaders and fast followers.

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