

Research Report: Best Practices

# Mobile Enterprise Management: Sunbelt Rentals Case Study

How Mobile Phones and Tablets Change Sales Practices and  
Open Up Opportunities, Both Internally and Externally



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R E S E A R C H

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## Purpose and Intent

Sunbelt Rentals decided in 2009 to introduce iPhones to its sales force. Though there were initial device management challenges, those have now been overcome – so much so that the decision to add iPads incurred only a minimal extra effort.

This is not a conventional Bring Your Own Device (BYOD) case study, but it is one where Sunbelt Rentals demonstrates how it overcame initial obstacles and yet accepted BYOD principles.

This case study is the fourth in a series in which different user organizations talk about their objectives and experiences. Through these, Constellation Research clients discover what others had to find out for themselves.

## Executive Summary

In this report, Sunbelt Rentals' Director of Enterprise Architecture Dean Moore discusses the introduction of smart devices (specifically iPhones and iPads) to Sunbelt Rentals' sales force, the management capabilities it discovered it needed, and the impact that a Mobile Enterprise Management (MEM) application made. He also talks about Sunbelt Rentals' attitude towards mobile devices, some unexpected benefits emerging from its mobile strategy, as well as employee and customer reactions.

Besides talking through their decision processes and selection criteria, Mr. Moore describes the lessons learned and best practices Sunbelt Rentals encountered or introduced.

## Behind Sunbelt Rentals' Mobile Strategy

Dean Moore is the Director of Enterprise Architecture at Sunbelt Rentals, Inc. (Sunbelt), which is headquartered in Fort Mill, South Carolina. Mr. Moore has been with Sunbelt for over 12 years and served in other roles with the company such as Manager of Technical Services, Director of Technical Services and Director of Application Integration.

Mr. Moore has more than 20 years of IT experience in both technical services and application development. Prior to joining Sunbelt Rentals, Mr. Moore served as the Manager of Network Services at Book of the Month Club, Inc., a Time Warner company, for 6 years. Before that, he held various IT positions at Information Services Group, RDS and EDS.

At Sunbelt, among his other duties, he is responsible for the company's mobile device initiatives, first in introducing this to the sales force and then extending it to all field personnel. He has overseen the evolution from different generations of iPhones and the introduction of iPads.

## Introducing and then Managing iPhones and iPads in an Enterprise

### Dean Moore, Director of Enterprise Architecture, Sunbelt Rentals

"Sunbelt Rentals is a wholly-owned subsidiary of Ashtead Group plc and is one of the largest equipment rental companies in the U.S We are based in Fort Mill, S.C. and we serve the needs of a wide variety of customers – from commercial, residential, municipal and specialized service industries to weekend do-it-yourselfers. We do this via a network of nearly 400+ locations in 35.

"Our aim is to provide a superior level of customer service. This is what led us in 2009 into the world of smart devices like the iPhone (and, later, the iPad) – as an initiative to improve both the customer experience and how our employees work internally and externally.

"Before 2009 we had traditional processes. Our sales people would go out to visit job sites to find out what that site might need in the way of equipment that we could rent. Though we experimented with BlackBerries and Nextel devices, neither had provided a field sustainable solution that addressed five particular problems:

- **Ensuring availability.** Sales people need to know what equipment is available at any time, and where.
- **Accessing the latest pricing.** Our rates vary frequently and sales reps relied on paper price sheets.

- **Providing immediacy of response.** In our pre-iPhone world, a sales rep would take details of what a site might need, leave the site to find a phone somewhere quiet, and then call into a local Sunbelt office to ask someone there to look up what was available and at what price – and then have to go back to the site with the details.
- **Booking.** Making the reservation or, at least, generating a quotation that the site manager could then authorize (thus avoiding a second site visit after a call back to the local office to make the reservation).
- **Improving the quality of user experience.** With both BlackBerries and the Nextel pilot we were not really assisting the sales rep, which is what we wanted to do. Our experience was that we needed to do much more if we were to help.

"A related challenge, and cost, was our price lists. The truth is that by the time a price list was printed and distributed to all sales reps, it was likely out of date – another justification for the sales rep to call into his local office to find out what was the most up-to-date price. Of course, this semi-manual process came at a cost – in sales rep time, in office support, in printing, in distribution, etc."

## Sunbelt Adopts the iPhone in 2009

"In 2009 we rolled out a strategic new application to our sales force. A principle objective was to increase visibility to sales reps of both the availability of our fleet and the related real-time rates – because this would differentiate us from our competitors. We had developed our own application to run on iPhones and it was deployed initially to some 1200 people for whom Sunbelt purchased the iPhones.

"Not long after deploying we realized that we did not have sufficient tools to manage these iPhones in a way that did not create more work. For example, if we wanted to wipe a device (because it was lost or stolen or a sales rep left the company) we could do this via Microsoft Exchange – but only if the device had an email address associated with it. As it happened, our application used a Sunbelt proprietary login method, which did not require each device to have an email address.

"Remember this was 2009 and the iPhone was running iOS 3, which did not possess the management capabilities that were subsequently introduced in iOS 4 and extended in iOS 5. Instead we chose to work with Apple to try to create an early management environment that suited our requirements. But this was difficult, primarily because iOS 3 really was not enterprise ready.

"You might ask, 'Why then did you choose the iPhone?' The answer is simple. It was because of the user experience. For the first time we felt we were seeing a device which users might enjoy using, rather than a company-mandated device which (usually) was less than a pleasure to use. For many years I had been looking for a tactical mobile device – one which they would want to have with them all the time and which would be a pleasure to use, including in front of customers. The iPhone was the first device which seemed to satisfy our vision – though it was

a difficult time to undertake such an investment, as we were entering a steep decline in construction-related spending. Nevertheless, we persevered because we saw the investment as being of strategic importance in differentiating ourselves from our competition.

"Looking back we took on more than we expected. While the iPhone with our app met our experience expectations, we did not have the management infrastructure in place. For example, we ordered 1200 iPhones which all arrived here at our headquarters at the same time. We then had to unbox them, manually authorize each one and load our iOS environment and profiles – before considering how to distribute them to 1200 people located across the U.S. This turned into a major logistical exercise that lasted approximately 2 1/2 months, even though we had five people from AT&T helping us in the initial unboxing and authorizing.

"Apple did try to help us. I was invited to speak at its WWDC about enterprise applications for iOS in 2009 (which seemed to be somewhat new as a concept to Apple). Together with our purchase and the contacts made at WWDC we liaised closely with Apple about what was needed for the enterprise space. Two developments changed our thinking:

- **Arrival of iOS 4.** For the first time this included a mobile device management framework.
- **Contact with AirWatch.** I had made contact with this company at the WWDC and it was ready with a mobile enterprise management tool that took advantage of iOS 4's new capabilities as soon as iOS 4 was available. (It was one of the relatively few companies with which Apple partnered before the release of iOS 4)."

## Acquiring a Mobile Device Management Environment

"With iOS 3, everything we did was done manually. We had had experience of BlackBerries and more importantly of the BlackBerry Enterprise Server, which did provide enterprise device management. We had nothing nearly similar at this time and that was why everything in retrospect seemed so cumbersome.

"With the arrival of iOS 4 and a small number of other vendor companies with which Apple had partnered in advance, we decided to look at AirWatch, MobileIron and Sybase. From our analysis we preferred the first for one particular reason: its DNA seemed to fit our needs. Let me explain. AirWatch was young and hungry but above all willing to work with us directly to extend its initial product to handle the specialty Sunbelt login and other requirements that I mentioned earlier. This uses the employee's own ID and a passcode. We use this everywhere, across all sorts of devices, and not all employees have (or need) Sunbelt email addresses. The difficulty is that this does not cooperate with Active Directory or ActiveSync and which are by far and away the most common ways of coordinating with remote or mobile devices.

"AirWatch was willing to architect and build a call-out to the Sunbelt security model, which we had previously written in .NET and thus exploit the necessary credentials. Within a couple of days we had a working solution which enabled us to manage every one of the iPhones that, for example, our drivers keep with them – because these guys do not have email accounts or

Active Directory accounts. They do not use our computers. The iPhone became the mechanism for how we locate them and then schedule deliveries. This impressed us for two reasons:

- **AirWatch treated us as a partner.** We were not just another customer where we had to accept however the product worked.
- **We could now manage all our iPhones Over The Air (OTA).** The AirWatch software now provided us with the tools we needed for remote enterprise mobile device management yet within the Sunbelt secure architecture.

"It also mirrored how Sunbelt works internally. For 90 percent of our customers, our web site is sufficient for their needs. But for a small number of significant customers, we go out of our way to adapt or change our systems to make it easier for that customer to work with us and our systems. This is what we regard as a true partnership."

## Mobile Enterprise Management in Practice

"Today we run AirWatch in-house as an application residing on our own systems. It has changed how we work with mobile devices. As I said before, when we bought the original iPhones they were all shipped to headquarters and then authorized.

"Today it is totally different. When we buy a new iPhone or iPad, now that we are deploying these, we have this shipped direct to the user. Separately, we send out instructions with the details of a particular URL that the device should access. When the user has both, he starts the device, goes to the URL, and fills in his or her name and employee ID by connecting over the air. Once connected, then the AirWatch processes take over for complete configuration of the device, implementation of security and loading of all relevant Sunbelt applications. This is all done OTA without the user needing to know any of the details. When finished, the user is ready to work.

"There was one wrinkle, however. When we started with AirWatch we had already deployed hundreds of iPhones which had used a very different agreement and configuration process. We took advantage of an opportunity to upgrade the original iPhone 3GSs to the newer (iPhone) 4 hardware to implement an important Sunbelt policy change as well as introduce AirWatch as our mobile management software.

"When users received their new iPhone 4s they also received the web address to enroll and enable the OTA processes. A key component of this process was, and continues to be, that the enrollment process asks the user if he or she will accept the device being managed remotely? As soon as the user agrees to this policy, then the enrollment/configuration commences. The important aspect is that we have the user's agreement. This was like a line in the sand. For the 3GS devices it was difficult to introduce these to remote management, because all had been manual beforehand. But with the new iPhone 4 roll out, Sunbelt now possessed the user's agreement."

## BYOD Considerations and an Unexpected Benefit

"All these are Sunbelt-purchased devices. As such their use can be shaped or determined by Sunbelt. But that is not our approach.

"Instead, we take an approach which is more like Bring Your Own Device than the traditional 'IT must micro-manage everything,' which had been true of BlackBerries and is true for devices like our PCs. Our view is that the more that users like and use their iPhones, the more they will also use them for work.

"To that end we put no restrictions (other than not doing anything illegal and enforcing the use of a pin to enter the device) on how users use their iPhones. They can download games; they can install learning apps or sports apps or whatever music and entertainment they want. We encourage their families to participate, on the basis that if the kids like it then our employee will look on the device less as a 'work tool' and more as a natural extension of his or her life, of which a part is working for Sunbelt. This changes mindsets; we are our own proof.

"We even offer our own internal app site where anyone can download our Sunbelt apps – if they have enrolled with the AirWatch device management application (you never know when a non-salesperson may run into an opportunity to help the business).

"The age of IT restricting users is over. Yes you have to be smart and you must act to secure the enterprise information assets, and we do (using the AirWatch technology). Our view is that you cannot dictate what people do all the time with a modern smart device. Hence we have an open-use policy, rather than one which restricts.

"With such freedom we have discovered that an attitudinal change occurs, one we had not expected. Given such freedom to make these devices their own, our people start to exploit what suits each person. They then take responsibility, because so much of their life is on the iPhone (home as well as work).

"In turn this means not only do they keep the Sunbelt device with them, but they look after it much better than they tend to look after other enterprise-owned equipment. Given that the iPhone is fairly delicate and that our people are going into outdoor construction sites, which are not renowned for their friendliness to electronics, we expected a fairly high damage rate. This has not proved to be the case. Instead, the damage rate (as well as loss rates) is lower than any other equivalent enterprise-owned device, even in spite of the harsh deployment environment. To us this is amazing. But it also makes sense: offer people responsibility and most will be responsible. Tell or instruct them what to do and the results are often not so beneficial.

"Yes, there are some people who do bring their own device to work. We can handle these without a problem. Really the only difference is when a BYOD device owner leaves. We cannot wipe their personal data and apps but the assent to their device being managed (obtained when they enrolled with AirWatch) means we can remove the Sunbelt apps, email, configuration and other enterprise aspects – and schedule this (again using the AirWatch



capabilities) for the time and on the day of termination of employment. For a Sunbelt-owned device, we can entirely wipe the device remotely at the appropriate time and day, if that is what is appropriate.

"In effect, therefore, we do not try to manage a double environment – one being the user's personal one and the other being the Sunbelt one. We regard these as one, though we can tell which are BYOD and which are Sunbelt devices, which does make the management of mobile devices so much easier."

## Employee and Customer Reactions

"Our experience thus far is that our employees love this and what it enables. We have now taken our approach further and started to introduce in 2012 iPads.

"The reasoning behind this was that we introduced a new custom CRM application. Today our analysis is that:

- **The iPhone is a tactical device.** A cellphone, even one as smart as the iPhone, is something you do not leave home or the office without – it is always with you.
- **The iPad is strategic.** This is primarily because there is so much more space to work with but also that it opens up new possibilities. It will most often be near you (in your car, your truck, in the office) but not always.

"Our CRM uses the iPad to make the most of Microsoft Dynamics. On an iPad our sales reps can see the details of existing customers and also potential ones. In addition, they can clearly view their sales territories as well as work out how best to visit and even schedule multiple customers in a given geographical area.

"This was rolled out in January to 1200 sales reps. In contrast to the initial 1200 iPhones, when we introduced these, it took a couple weeks rather than 2 1/2 months – with much less effort at the center. The iPads went directly to the sales reps. Separately, we sent the enrollment URL to connect to, and the AirWatch software did the rest.

"I thought this was going to involve a substantial amount of preparation at the center beforehand. I was wrong. The sales reps do have email addresses, which delivered the enrollment URL – and the rest was pretty much already in place.

"One of the best aspects of mobile device management is that when you have your policies and device management infrastructure in place, subsequent changes are much less difficult. In addition, the latest iOS 5 enables us to push the necessary Sunbelt applications to each device. Now we can specify that Sunbelt requires an application for specific roles or job functions.

"The result is that that sales reps now have with the iPad an instant-on device that enables them to do more research on customers, or us to provide them with the additional detail that

we think is relevant. We could do this on the iPhone, but it needs awkward navigation. In contrast the iPad reduces navigation.

"As for customers, they love our approach too. They see Sunbelt as being immediately responsive, rather than having to go through the traditional, semi-manual processes. We think we are in a win/win position. Furthermore, more often than not the person who is in the job trailer and who can provide the necessary quotation detail wins the bid.

"Even when times were looking at their toughest in 2008/2009, we invested. That this is paying off with more sales and improved customer satisfaction."

## Lessons Learned and Best Practices

"Looking back, I wish we had had the AirWatch application in 2009. That first introduction of iPhones was so much harder than it would be today. On the other hand, I have to be realistic: iOS 3 did not have the enterprise depth we needed, and probably AirWatch would not have had it either. But that is the past.

"My first, second and third best practices should all happen upfront:

- **Plan out your provisioning profiles.** This requires thinking ahead as to how you wish your device to be configured and what capabilities you enable or inhibit.
- **Decide what operational policies you wish to observe.** Within all good enterprise mobile device management you have to formulate and then express the policies – for the automation of much of the management function drives off these policies.
- **Define your security.** Mobile devices open up possibilities, but that is not an excuse to let corporate security standards relax – mobility demands at least as tight security if the enterprise is to protect its assets.

"If the first two require effort, the latter presents a conundrum. On the one hand you want to protect the enterprise and its data, but on the other hand you want to enable users to experiment as well as exploit the power and facilities that come in an iPad or iPhone. It is when they do the latter that unexpected productivity and results arrive. Talking with many in IT, it is clear to me that many are uncomfortable with enabling of experimentation or even open-use. My own view is that IT has to accept mobile devices as an enabler for employees to do their jobs, which is the approach we have adopted at Sunbelt.

"A lesson we are still learning is about hosting – should we run something like the AirWatch application in-house (as we do) or should AirWatch run it for us in its cloud. When we started with AirWatch our natural (IT) preference was to bring it in-house and have control (and, if I am honest, because this is the way we had always done it). Now that we have it here, it seems easier to continue in this way. That said, and with the passage of time, I am not sure I would make the same decision today if we were starting out. Hosting it with the specialists is inherently easier and simpler, and is one less aspect to worry about in-house. To put it

another way, when all of IT was connected to the same copper within an enterprise it made sense to keep this internal. But mobiles are mobile; they are not on the same copper and so a change of thinking may be appropriate.

"This is a difficult decision. But I ask myself, 'is running a mobile enterprise management application a core activity for Sunbelt?' Like accounting or CRM, I do not think it is – even if mobile devices and what they can do for Sunbelt are definitely strategic and at the core of improving our ways of doing more business."

## Actionable Advice: Follow These 7 Steps to Success

Mr. Moore describes how mobile devices have changed attitudes in Sunbelt Rentals. Though not a traditional BYOD organization, the Sunbelt Rentals attitude to mobile devices is refreshing – and has produced positive results. The most unlikely is that what were thought to be delicate devices are treated with greater respect when they become part of the employee's private life – and not just an enterprise tool.

Taking the input from Mr. Moore and combining it with other Constellation Research experiences and findings, we recommend these seven steps to improve your enterprise's ability to succeed with the new mobility and its associated facets:

1. **Accept that mobility is here to stay.** Enterprises can try to resist mobility. It might work, but more likely will be futile. Better results will arrive if enterprises signal acceptance early and adapt to encourage use of mobile devices.
2. **Open your enterprise's mindset and think about what mobility can improve.** As Sunbelt Rentals demonstrates, mobile devices can deliver impressive benefits in sales and other areas – once an organization encourages innovation and thinking outside the traditional box (and this applies, possibly, to IT even more than operations or lines of business).
3. **Assess how urgently action to address mobility is required.** You may think you do not face a mobility tidal wave. Find out whether you do. Constellation Research offers a Mobility Action/Urgency Questionnaire and supporting approach if you need evidence.
4. **Adopt a mobility management approach that automates as well as secures the enterprise's assets.** Measure mobility in terms of numbers of devices (not employees) – remembering that some employees will have more than two smart devices: smartphone, tablet and laptop. Insist that mobile management solutions include high degrees of enterprise-quality security, self support, automation as well as an internal app store (so that not everything has to go through the Apple iTunes App Store, Android Market, etc.)
5. **Look for quick wins to accelerate acceptance of enterprise-imposed constraints.** Constraints on how employees use their devices with enterprise IT are inevitable.

Reduce resistance by identifying quick and straightforward “wins” where the employee with his or her device feels empowered.

6. **Consider mobility to be a strategic business opportunity.** Mobility beyond simple phone functions opens up information and delivery options. The more open the enterprise “mind,” the greater the payback.
7. **Remember to be friendly.** In the past, IT has prescribed policies and proscribed activities – because it could do so (it owned the technology). That will no longer work and may even be a reason to consider making another, more employee-friendly department responsible for the management of mobility (albeit within an IT-designed envelope). A related consideration – do not assume that traditional systems management tools apply to mobility; most are inflexible and better suited to datacenters than employees.

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## Disclosures

Your trust is important to us, and as such, we believe in being open and transparent about our financial relationships. With our client's permission, we publish a [list](#) on our website.

## Analyst Bio: Charles Brett

### Mobile and Infrastructure Strategist for Enterprises, Blended with CoIT

Charles Brett is currently Vice President and Principal Analyst at Constellation Research, Inc. For more than 25 years Charles has focused on delivering common sense to the application of technologies, especially software ones, in organizations of all sizes around the world.

### Expertise

Charles' initial focus at Constellation is on mobility management in the enterprise including Mobile Device Management (MDM) and Bring Your Own Device (BYOD). He has consulted and worked with users and vendors on high-performance, low-cost processing including organization-specific, cloud-like computing, event processing/complex event processing (especially when combined with GPS), enterprise architecture including automating the discovery and management of applications, plus integration of diverse systems, virtualization, and how to cut costs and electronic publishing. He has an ongoing interest in automated metering for the electricity, gas and water industries.

Specific sectors of interest and experience include finance (especially systems supporting wholesale finance), telecommunications and energy and its conservation.

### Media Influence

Previously, Charles was the Editorial Director of *MIDDLEWARESPECTRA* (now published as *INSIGHT-SPECTRA*), a Journal focusing on the use of software, especially integration with its multiplicity of middleware technologies.

Charles has been a regular at multiple industry conferences and has written for numerous publications including *The Times* of London and the *Financial Times*.

He was the General Chair in 2005 of the bi-annual High Performance Systems Workshop.

He is also the author of "Explaining iTunes, iPhones and iPads for Windows Users," (2011) and "The 5 Axes of Business Application Integration," (2004).

### Education

Charles has an MA and BA in Modern History from the University of Oxford.

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# About Constellation Research

Constellation Research is a specialty research and advisory firm that serves business leaders who seek to unleash the power of emerging and disruptive technologies. Our research analysts start by understanding the business objective, applying real world experience and insights, and then incorporating disruptive technologies and innovative business models as appropriate.

We cater to board of directors, c-suite executives, and line of business leaders looking for an edge in business model and technology innovation. We help our clients combine the disruptive and traditional technologies in solving the tough business problems. Most importantly, our research outputs always provide an insightful buy-side point of view. We look forward to serving you with Insight, Inspiration, and Impact.

We're business leader and business value focused. Constellation differentiates itself in the market in two ways by:

1. **Focusing on the boardroom and C-suite point of view.** Constellation's research addresses the needs of boards, CEOs, CFOs, CIOs, CMOs, CHROs, CPOs, CSCOs, and COOs.
2. **Addressing the business problem first.** Research starts by addressing business value and then applying where disruptive and emerging technologies may play a role.

## Organizational Highlights

- Founded and headquartered in the San Francisco Bay Area, United States, in 2010.
- Named [Institute of Industry Analyst Relations \(IIAR\)](#) New Analyst Firm of the Year in 2011.
- Serving over 100 buy-side and sell-side clients around the globe.
- Growing firm with 31 members including 14 research analysts and futurists, 5 sales professionals, 5 professional staff, and 7 industry recognized board of advisors.
- Experienced research team with an average of 21 years of practitioner, management, and industry experience.
- Creators of the Constellation Supernova Awards - the industry's first and largest recognition of innovators, pioneers, and teams who apply emerging and disruptive technology to drive business value.
- Organizers of the Constellation Connected Enterprise - an innovation summit and best practices knowledge sharing retreat for business leaders.

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