

CHANGE NOTICE FORM

Collective Number: N/A
SAP Contract Number: 4400021700
Change Number: 1
Change Effective Date: 10/24/2022

For: All Using Agencies
Subject: Contract Renewal – IT Professional Services

Contract Period: Beginning October 27, 2022, and Ending October 26,2027
Commodity Specialist: **Raymond A. Jaime**

CHANGE SUMMARY:

Forrester Research, Inc has completed the renewal of their GSA contract 47QTCA18D001C. This renewal allows COPA to extend the Participating Addendum contract through 10/ 26/2027. Please reference the attached document below for additional information.

ALL OTHER TERMS AND CONDITIONS OF THIS AGREEMENT NOT CHANGED BY THIS CHANGE NOTICE REMAIN AS ORIGINALLY WRITTEN.

General Services Administration

Authorized Federal Supply Schedule Pricelist

On-line access to contract ordering information, terms and conditions, up-to-date pricing, and the option to create an electronic delivery order are available through GSA Advantage!®, a menu-driven database system. The internet address GSA Advantage!® is: GSAAdvantage.gov.

MULTIPLE AWARD SCHEDULE

Applicable FSC Codes: D399, D304

Forrester Research, Inc.
60 Acorn Park Drive, Cambridge, MA 02140
Phone: 617.613.6274
Fax: 617-613-5200
<http://www.Forrester.com>

Contract Number: **47QTCA18D001C**

For more information on ordering from Federal Supply Schedules click on the FSS Schedules button at fss.gsa.gov.

Contract Period: **October 26, 2017 – October 26, 2022**

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CHALLENGE THINKING.
LEAD CHANGE.



Founded in 1983 with corporate headquarters in Cambridge, MA and a Federal Government office in McLean, VA, Forrester Research, Inc. (Forrester) is an independent, objective research company that can provide the Federal Government with comprehensive, in-depth, and unbiased information, and analysis, best-in-breed, pragmatic, and forward-thinking advice. Forrester focuses on the business implications of technology change to help its clients create a unified plan that gains business/organizational advantage. Uniquely, Forrester guides business and government strategists, marketing executives, government agencies, and Information Technology (IT) professionals, global leaders in business, government and technology that collaborate with us to accelerate achievement of their business IT goals.

Our rigorous methodologies experience has helped Information IT Professionals make smart, confident decisions that improve their organizations' performance. We understand business executives' goals and challenges via over 30,000 Business executives interviews a year to understand their issues and what they need to be successful and use this information to provide objective advice to help meet department initiatives. Other IT Research firms just ask IT what the business wants and needs, which we believe is a flawed methodology. Forrester focuses on the business/mission from the beginning. Forrester analysts enter into consulting engagements with a deep, immediate understanding of your mission, stakeholders, and goals — meaning faster, more cost-efficient results.

For examples of how we support our Public Sector clients, including specific Public Sector content, please visit our Government Landing Page: <https://go.forrester.com/government-solutions/>

Special Item No. 54151S Information Technology Professional Services

Note: All non-professional labor categories must be incidental to and used solely to support hardware, software and/or professional services, and cannot be purchased separately.

SPECIAL ITEM NO. 54151ECOM ELECTRONIC COMMERCE AND SUBSCRIPTION SERVICES

Forrester Research, Inc.
60 Acorn Park Drive, Cambridge, MA 02140
Phone: 617.613.6274
Fax: 617-613-5200
<http://www.Forrester.com>

Contract Number: **47QTCA18D001C**

Period Covered by Contract: **October 26, 2017 – October 26, 2022**

General Services Administration
Federal Acquisition Service

Products and ordering information in this Authorized Multiple Award Schedule Pricelist are also available on the GSA Advantage! System (<http://www.gsaadvantage.gov>).

Customer Information

1.A. TABLE OF AWARDED SPECIAL ITEM NUMBER(S) WITH APPROPRIATE CROSS-REFERENCE TO ITEM DESCRIPTIONS AND AWARDED PRICE(S).

The table below identifies Forrester's awarded Special Item Numbers, with cross-references to the item descriptions and awarded prices for the products offered under each SIN.

SIN	Section Reference	Page Number Reference
54151S	"Advisory"	15-16
54151ECOM	"Research"	17-19
54151ECOM	"Leadership Boards (Part #LB_U)"	20
54151ECOM	"Leadership Boards – Insight (Part #LB_I)"	21
54151ECOM	"Age of the Customer (AoC) Research Member with Advice"	22
54151ECOM	"Executive Programs – (Part #EP_CIO)"	23
54141ECOM	"Consumer Technographics"	24
OLM	Addressed at the order level.	N/A

1.B. IDENTIFICATION OF THE LOWEST-PRICED MODEL NUMBER AND LOWEST UNIT PRICE FOR THAT MODEL FOR EACH SPECIAL ITEM NUMBER AWARDED IN THE CONTRACT.

The table below identifies the lowest priced model number and lowest unit price for that model for each special item number awarded in the contract.

SIN	Lowest Priced Model Number	Unit Price
54151S	Service Unit	\$115.71
54151ECOM	R_R	\$9,240.55
OLM	N/A	N/A

1.C. HOURLY RATES

Not applicable.

2. MAXIMUM ORDER (ALL DOLLAR AMOUNTS ARE EXCLUSIVE OF ANY DISCOUNT FOR PROMPT PAYMENT.)

- a. The Maximum Order value for the following Special Item Numbers (SINs) is \$500,000:
 - Special Item Number 54151S - Information Technology Professional Services
 - Special Item Number 54151ECOM – Electronic Commerce and Subscription Services

3. MINIMUM ORDER

The minimum dollar value of orders to be issued is \$55.00.

4. GEOGRAPHIC SCOPE OF CONTRACT:

The Geographic Scope of Contract will be domestic and overseas delivery.

5. POINT(S) OF PRODUCTION:

City	County	State	Foreign Country
Cambridge	Middlesex	Massachusetts	N/A

6. DISCOUNT FROM LIST PRICES OR STATEMENT OF NET PRICE.

Prices shown are net prices; basic discounts have been deducted.

7. QUANTITY DISCOUNTS.

See Volume Discounts

8. PROMPT PAYMENT TERMS

Net 30 days

Information for Ordering Offices: Prompt payment terms cannot be negotiated out of the contractual agreement in exchange for other concessions.

9.A. NOTIFICATION THAT GOVERNMENT PURCHASE CARDS ARE ACCEPTED AT OR BELOW THE MICRO-PURCHASE THRESHOLD.

Contractor must accept the credit card for payments equal to or less than the micro-purchase for oral or written orders under this contract.

9B. NOTIFICATION WHETHER GOVERNMENT PURCHASE CARDS ARE ACCEPTED OR NOT ACCEPTED ABOVE THE MICRO-PURCHASE THRESHOLD.

The Contractor and the ordering agency may agree to use the credit card for dollar amounts over the micro-purchase threshold (See GSAR 552.232-79 Payment by Credit Card). In addition, bank account information for wire transfer payments will be shown on the invoice.

10. FOREIGN ITEMS (LIST ITEMS BY COUNTRY OF ORIGIN).

Not applicable.

11A. TIME OF DELIVERY. (CONTRACTOR INSERT NUMBER OF DAYS.)

SPECIAL ITEM NUMBER	DELIVERY TIME (Days ARO)
54151S	30 Days
54151ECOM	30 Days

11B. EXPEDITED DELIVERY.

Contact the Contractor for availability and rates.

11C. OVERNIGHT AND 2-DAY DELIVERY.

Contact the Contractor for availability and rates.

11D. URGENT REQUIREMENTS.

URGENT REQUIREMENTS: When the Federal Supply Schedule contract delivery period does not meet the bona fide urgent delivery requirements of an ordering activity, ordering activities are encouraged, if time permits, to contact the Contractor for the purpose of obtaining accelerated delivery. The Contractor shall reply to the inquiry within 3 workdays after receipt. (Telephonic replies shall be confirmed by the Contractor in writing.) If the Contractor offers an accelerated delivery time acceptable to the ordering activity, any order(s) placed pursuant to the agreed upon accelerated delivery time frame shall be delivered within this shorter delivery time and in accordance with all other terms and conditions of the contract.

12. F.O.B. POINT(S).

Destination

13A. ORDERING ADDRESS(ES).

Ordering address: Forrester Research, Inc.
60 Acorn Park Drive
Cambridge, MA 02140

13B. ORDERING PROCEDURES: FOR SUPPLIES AND SERVICES, THE ORDERING PROCEDURES, INFORMATION ON BLANKET PURCHASE AGREEMENTS (BPA'S) ARE FOUND IN FEDERAL ACQUISITION REGULATION (FAR) 8.405-3.

Ordering activities shall use the ordering procedures of Federal Acquisition Regulation (FAR) 8.405 when placing an order or establishing a BPA for supplies or services. These procedures apply to all schedules.

- a. FAR 8.405-1 Ordering procedures for supplies, and services not requiring a statement of work.
- b. FAR 8.405-2 Ordering procedures for services requiring a statement of work.

The following telephone number(s) can be used by ordering activities to obtain technical and/or ordering assistance: 617-613-6274

14. PAYMENT ADDRESS(ES).

Payment address: Forrester Research, Inc.
Dept. CH 10334
Palatine, IL 60055-0334

Wire Funds: Citizens Bank, Providence, RI 02915,
Wire ABA#0115-0012-0,
ACH ABA#211 0701 75 for credit to:

Forrester Research, Inc.
Account#: 1135580437

The following telephone number(s) can be used by ordering activities to obtain technical and/or ordering assistance: 617-613-6274

15. WARRANTY PROVISION.

Contractor's standard commercial warranty.

16. EXPORT PACKING CHARGES, IF APPLICABLE.

Not applicable.

17. TERMS AND CONDITIONS OF GOVERNMENT PURCHASE CARD ACCEPTANCE (ANY THRESHOLDS ABOVE THE MICRO-PURCHASE LEVEL).

Contact the Contractor for terms and conditions of acceptance.

18. TERMS AND CONDITIONS OF RENTAL, MAINTENANCE, AND REPAIR (IF APPLICABLE).

Not applicable.

19. TERMS AND CONDITIONS OF INSTALLATION (IF APPLICABLE).

Not applicable.

20. TERMS AND CONDITIONS OF REPAIR PARTS INDICATING DATE OF PARTS PRICE LISTS AND ANY DISCOUNTS FROM LIST PRICES (IF APPLICABLE).

Not applicable.

20A. TERMS AND CONDITIONS FOR ANY OTHER SERVICES (IF APPLICABLE).

Not applicable.

21. LIST OF SERVICE AND DISTRIBUTION POINTS (IF APPLICABLE).

Not applicable.

22. LIST OF PARTICIPATING DEALERS (IF APPLICABLE).

Not applicable.

23. PREVENTIVE MAINTENANCE (IF APPLICABLE).

Not applicable.

24A. SPECIAL ATTRIBUTES SUCH AS ENVIRONMENTAL ATTRIBUTES (E.G., RECYCLED CONTENT, ENERGY EFFICIENCY, AND/OR REDUCED POLLUTANTS).

Not applicable.

24B. IF APPLICABLE, INDICATE THAT SECTION 508 COMPLIANCE INFORMATION IS AVAILABLE ON ELECTRONIC AND INFORMATION TECHNOLOGY (EIT) SUPPLIES AND SERVICES AND SHOW WHERE FULL DETAILS CAN BE FOUND (E.G. CONTRACTOR'S WEBSITE OR OTHER LOCATION.)

If applicable, Section 508 compliance information on the supplies and services in this contract are available in Electronic and Information Technology (EIT) at the following:

<http://www.forrester.com>

The EIT standard can be found at: www.Section508.gov/.

25. DATA UNIVERSAL NUMBER SYSTEM (DUNS) NUMBER.

10-6765-928

26. NOTIFICATION REGARDING REGISTRATION IN SYSTEM FOR AWARD MANAGEMENT (SAM) DATABASE.

Contractor maintains an active registration in the SAM database.

Terms and Conditions Applicable to Information Technology (IT) Professional Services (Special Item Number 54151S)

****NOTE: All non-professional labor categories must be incidental to, and used solely to support professional services, and cannot be purchased separately.

1. SCOPE

- a. The prices, terms and conditions stated under Special Item Number 54151S Information Technology Professional Services apply exclusively to IT Professional Services within the scope of this Information Technology Schedule.
- b. The Contractor shall provide services at the Contractor's facility and/or at the ordering activity location, as agreed to by the Contractor and the ordering activity.

2. PERFORMANCE INCENTIVES I-FSS-60 PERFORMANCE INCENTIVES (APRIL 2000)

- a. Performance incentives may be agreed upon between the Contractor and the ordering activity on individual fixed price orders or Blanket Purchase Agreements under this contract.
- b. The ordering activity must establish a maximum performance incentive price for these services and/or total solutions on individual orders or Blanket Purchase Agreements.
- c. Incentives should be designed to relate results achieved by the contractor to specified targets. To the maximum extent practicable, ordering activities shall consider establishing incentives where performance is critical to the ordering activity's mission and incentives are likely to motivate the contractor. Incentives shall be based on objectively measurable tasks.

3. ORDER

- a. Agencies may use written orders, EDI orders, blanket purchase agreements, individual purchase orders, or task orders for ordering services under this contract. Blanket Purchase Agreements shall not extend beyond the end of the contract period; all services and delivery shall be made and the contract terms and conditions shall continue in effect until the completion of the order. Orders for tasks which extend beyond the fiscal year for which funds are available shall include FAR 52.232-19 (Deviation – May 2003) Availability of Funds for the Next Fiscal Year. The purchase order shall specify the availability of funds and the period for which funds are available.
- b. All task orders are subject to the terms and conditions of the contract. In the event of conflict between a task order and the contract, the contract will take precedence.

4. PERFORMANCE OF SERVICES

- a. The Contractor shall commence performance of services on the date agreed to by the Contractor and the ordering activity.
- b. The Contractor agrees to render services only during normal working hours, unless otherwise agreed to by the Contractor and the ordering activity.

- c. The ordering activity should include the criteria for satisfactory completion for each task in the Statement of Work or Delivery Order. Services shall be completed in a good and workmanlike manner.
- d. Any Contractor travel required in the performance of IT/IAM Services must comply with the Federal Travel Regulation or Joint Travel Regulations, as applicable, in effect on the date(s) the travel is performed. Established Federal Government per diem rates will apply to all Contractor travel. Contractors cannot use GSA city pair contracts.

5. STOP-WORK ORDER (FAR 52.242-15) (AUG 1989)

(a) The Contracting Officer may, at any time, by written order to the Contractor, require the Contractor to stop all, or any part, of the work called for by this contract for a period of 90 days after the order is delivered to the Contractor, and for any further period to which the parties may agree. The order shall be specifically identified as a stop-work order issued under this clause. Upon receipt of the order, the Contractor shall immediately comply with its terms and take all reasonable steps to minimize the incurrence of costs allocable to the work covered by the order during the period of work stoppage. Within a period of 90 days after a stop-work is delivered to the Contractor, or within any extension of that period to which the parties shall have agreed, the Contracting Officer shall either-

(1) Cancel the stop-work order; or

(2) Terminate the work covered by the order as provided in the Default, or the Termination for Convenience of the Government, clause of this contract.

(b) If a stop-work order issued under this clause is canceled or the period of the order or any extension thereof expires, the Contractor shall resume work. The Contracting Officer shall make an equitable adjustment in the delivery schedule or contract price, or both, and the contract shall be modified, in writing, accordingly, if-

(1) The stop-work order results in an increase in the time required for, or in the Contractor's cost properly allocable to, the performance of any part of this contract; and

(2) The Contractor asserts its right to the adjustment within 30 days after the end of the period of work stoppage; provided, that, if the Contracting Officer decides the facts justify the action, the Contracting Officer may receive and act upon the claim submitted at any time before final payment under this contract.

(c) If a stop-work order is not canceled and the work covered by the order is terminated for the convenience of the Government, the Contracting Officer shall allow reasonable costs resulting from the stop-work order in arriving at the termination settlement.

(d) If a stop-work order is not canceled and the work covered by the order is terminated for default, the Contracting Officer shall allow, by equitable adjustment or otherwise, reasonable costs resulting from the stop-work order.

6. INSPECTION OF SERVICES

In accordance with FAR 52.212-4 CONTRACT TERMS AND CONDITIONS--COMMERCIAL ITEMS (MAR 2009) (DEVIATION I - FEB 2007) for Firm-Fixed Price orders and FAR 52.212-4 CONTRACT TERMS AND CONDITIONS --COMMERCIAL ITEMS (MAR 2009) (ALTERNATE I - OCT 2008) (DEVIATION I - FEB 2007) applies to Time-and-Materials and Labor-Hour Contracts orders placed under this contract.

7. RESPONSIBILITIES OF THE CONTRACTOR

The Contractor shall comply with all laws, ordinances, and regulations (Federal, State, City, or otherwise) covering work of this character. If the end product of a task order is software, then FAR 52.227-14 (Dec 2007) Rights in Data – General, may apply.

8. RESPONSIBILITIES OF THE ORDERING ACTIVITY

Subject to security regulations, the ordering activity shall permit Contractor access to all facilities necessary to perform the requisite IT/IAM Professional Services.

9. INDEPENDENT CONTRACTOR

All IT/IAM Professional Services performed by the Contractor under the terms of this contract shall be as an independent Contractor, and not as an agent or employee of the ordering activity.

10. ORGANIZATIONAL CONFLICTS OF INTEREST

a. Definitions.

“Contractor” means the person, firm, unincorporated association, joint venture, partnership, or corporation that is a party to this contract.

“Contractor and its affiliates” and “Contractor or its affiliates” refers to the Contractor, its chief executives, directors, officers, subsidiaries, affiliates, subcontractors at any tier, and consultants and any joint venture involving the Contractor, any entity into or with which the Contractor subsequently merges or affiliates, or any other successor or assignee of the Contractor.

An “Organizational conflict of interest” exists when the nature of the work to be performed under a proposed ordering activity contract, without some restriction on ordering activities by the Contractor and its affiliates, may either (i) result in an unfair competitive advantage to the Contractor or its affiliates or (ii) impair the Contractor’s or its affiliates’ objectivity in performing contract work.

b. To avoid an organizational or financial conflict of interest and to avoid prejudicing the best interests of the ordering activity, ordering activities may place restrictions on the Contractors, its affiliates, chief executives, directors, subsidiaries and subcontractors at any tier when placing orders against schedule contracts. Such restrictions shall be consistent with FAR 9.505 and shall be designed to avoid, neutralize, or mitigate organizational conflicts of interest that might otherwise exist in situations related to individual orders placed against the schedule contract. Examples of situations, which may require restrictions, are provided at FAR 9.508.

11. INVOICES

The Contractor, upon completion of the work ordered, shall submit invoices for IT/IAM Professional services. Progress payments may be authorized by the ordering activity on individual orders if appropriate. Progress payments shall be based upon completion of defined milestones or interim products. Invoices shall be submitted monthly for recurring services performed during the preceding month.

12. PAYMENTS

For firm-fixed price orders the ordering activity shall pay the Contractor, upon submission of proper invoices or vouchers, the prices stipulated in this contract for service rendered and accepted. Progress

payments shall be made only when authorized by the order. For time-and-materials orders, the Payments under Time-and-Materials and Labor-Hour Contracts at FAR 52.212-4 (MAR 2009) (ALTERNATE I – OCT 2008) (DEVIATION I – FEB 2007) applies to time-and-materials orders placed under this contract. For labor-hour orders, the Payment under Time-and-Materials and Labor-Hour Contracts at FAR 52.212-4 (MAR 2009) (ALTERNATE I – OCT 2008) (DEVIATION I – FEB 2007) applies to labor-hour orders placed under this contract. 52.216-31(Feb 2007) Time-and-Materials/Labor-Hour Proposal Requirements—Commercial Item Acquisition As prescribed in 16.601(e)(3), insert the following provision:

(a) The Government contemplates award of a Time-and-Materials or Labor-Hour type of contract resulting from this solicitation.

(b) The offeror must specify fixed hourly rates in its offer that include wages, overhead, general and administrative expenses, and profit. The offeror must specify whether the fixed hourly rate for each labor category applies to labor performed by—

(1) The offeror;

(2) Subcontractors; and/or

(3) Divisions, subsidiaries, or affiliates of the offeror under a common control.

13. RESUMES

Resumes shall be provided to the GSA Contracting Officer or the user ordering activity upon request.

14. INCIDENTAL SUPPORT COSTS

Incidental support costs are available outside the scope of this contract. The costs will be negotiated separately with the ordering activity in accordance with the guidelines set forth in the FAR.

15. APPROVAL OF SUBCONTRACTS

The ordering activity may require that the Contractor receive, from the ordering activity's Contracting Officer, written consent before placing any subcontract for furnishing any of the work called for in a task order.

16. DESCRIPTION OF IT/IAM PROFESSIONAL SERVICES AND PRICING

a. The Contractor shall provide a description of each type of IT/IAM Service offered under Special Item Numbers 54151S IT/IAM Professional Services should be presented in the same manner as the Contractor sells to its commercial and other ordering activity customers. If the Contractor is proposing hourly rates, a description of all corresponding commercial job titles (labor categories) for those individuals who will perform the service should be provided.

b. Pricing for all IT/IAM Professional Services shall be in accordance with the Contractor's customary commercial practices; e.g., hourly rates, monthly rates, term rates, and/or fixed prices, minimum general experience and minimum education.

The following is an example of the manner in which the description of a commercial job title should be presented:

EXAMPLE: Commercial Job Title: System Engineer

Minimum/General Experience: Three (3) years of technical experience which applies to systems analysis and design techniques for complex computer systems. Requires competence in all phases of systems analysis techniques, concepts and methods; also requires knowledge of available hardware, system software, input/output devices, structure and management practices.

Functional Responsibility: Guides users in formulating requirements, advises alternative approaches, conducts feasibility studies.

Minimum Education: Bachelor's Degree in Computer Science

Terms and Conditions Applicable to Electronic Commerce and Subscription Services (Special Item Number 54151ECOM)

Includes value added network services, e-mail services, Internet access services, electronic subscription services, data transmission services, and emerging electronic commerce technologies.

NOTE: The Transactional Data Reporting (TDR) Rule requires vendors to electronically report the price the federal government paid for an item or service purchased through GSA acquisition vehicles. The TDR PILOT DOES NOT APPLY TO THIS SIN, EXCEPT if a TDR-covered SIN(s) is proposed as part of your total offering to GSA (e.g. offer 54151S and 7010). If both TDR and NON-TDR SINs are offered, then the entire contract is subject to TDR and the Price Reduction Clause (PRC) and Commercial Sales Practice (CSP) requirements are removed for the entire contract. If NON-TDR SIN(s) are offered only, then the offering will be subject to PRC and CSP.

NOTES: Electronic Commerce Services are not intended to supersede or be substituted for any voice requirements of FTS2001.

Please see the additional terms and conditions applicable to this Special Item Number (SIN) found in a separate attachment to the Solicitation. These terms and conditions do not contain specific and negotiated contractual language for this SIN. The Schedule contractor may have submitted additional information to complete the "fill-in" to the terms and conditions. The ordering activities shall request the Schedule contractors to submit these additional contract terms and conditions for this applicable SIN when responding to an order.

Ordering activities may request from Schedule contractors their awarded End User License Agreements (EULAs) or Terms of Service (TOS) Agreements, which will assist the ordering activities with reviewing the terms and conditions and additional products and service and prices which may be included.

Exception: According to SBA standards NAICS code 541519 has the dollar value standard of \$27.5 million except if you are a Value Added Reseller (150 employee standard). For more information please visit http://www.naics.com/naicswp2014/wp-content/uploads/2014/10/2014-Size_Standards_Table.pdf

Sales: \$224,474,817

Sales Period: October 1, 2015 to Sep 30, 2016

Cooperative Purchasing: Yes

Set Aside: No

FSC/PSC Code: D304

Maximum Order: \$500,000

NAICS

Number	Description	Business Size
517110	Wired Telecommunications Carriers	1500 employees
517911	Telecommunications Resellers	1500 employees
517919	All Other Telecommunications	\$32.5 million
518210	Data Processing, Hosting, and Related Services	\$32.5 million
519130	Internet Publishing and Broadcasting and Web Search Portals	1000 employees
541519	Other Computer Related Services	\$27.5 million

Forrester Products and Solutions

Advisory

Forrester's analyst advisory engagements can play a critical role in ensuring successful outcomes for your technology management or marketing and strategy initiatives. Advisory engagements are built on Forrester's consumer, buyer, market, and technology adoption insights. Expert analysts demonstrate how our research applies to your initiatives, providing best practices and a direct line of sight into emerging trends. Advisory engagements align to specific research themes, such as customer experience, big data, digital business, or mobile.

Advisory Forrester clients can purchase Service Units, which act as prepaid Forrester credits for conducting analyst advisory sessions. Service Units maximize the value of your relationship with Forrester by applying our research to your specific situation through a retainer of prepaid analyst time. As a Service Unit client, you will work with a program manager who will use their understanding of your business needs to identify, customize, and facilitate interactive sessions to address your pressing business challenges.

Flexible options are available for analyst advisory engagements, including full-day, half-day, and hourly advisory sessions for your internal — or external — audience. Sessions are conducted in person or virtually. Options include:

- › **Visioning:** Forrester's analysts are at the forefront of the areas that matter most to your organization. Through an interactive session, Forrester's thought leadership and deep market knowledge will help set the stage for your vision for the next three to five years and inspire action.
- › **Maturity Assessments:** Forrester will guide your organization's understanding of how to assess its readiness, address strengths and weaknesses, and identify the steps to move to the next level of maturity by leveraging Forrester's maturity assessment models, research, and best practices.
- › **Business Cases:** Forrester will guide your business and technology stakeholders and provide the foundation to create an effective business case for your technology investments. Through facilitated discussions and exercises, the session will explore the costs, benefits, flexibility, and risks associated with a technology investment decision.
- › **Strategic Road Maps:** Forrester will guide the definition of your organization's strategic road map and provide advice for how to develop a winning strategy for successful adoption. Through a facilitated session, apply Forrester's unique understanding of best practices for establishing a strategic road map through key elements such as milestones, prioritization, tradeoffs, and risks.

Please see our website for more examples of Forrester's advisory capabilities.

Pricing (each):

Advisory Day: \$9,256.62

Advisory Call: \$1,157.08

Service Unit: \$115.71

Consulting Labor Category	Functionality Responsibility (Summary)	Daily Rate
Consulting Day Rate - Editor	The editor is responsible for the editing and production of final client materials.	\$871.54
Consulting Day Rate - Associate Consultant	Consultants apply their skills and expertise in specific subject matter areas to help develop solutions to client needs. They are also responsible for overseeing day-to-day task management and creation of deliverables for specified client needs.	\$1,359.60
Consulting Day Rate - Consultant	Consultants are responsible for day-to-day task management and creation of deliverables for specified client needs.	\$2,510.03
Consulting Day Rate - Senior Consultant	Senior Consultants apply their broad management skills and specialized functional and technical expertise to guide project teams in delivering client solutions or to manage the day-to-day operations. This individual organizes and assigns responsibilities to subordinates and oversees the assigned tasks.	\$3,451.28
Consulting Day Rate - Principal Consultant	The Principal Consultant manages, plans and coordinates activities of projects. This individual reviews project proposals or plans to determine schedule, funding limitations, procedures for accomplishing projects, staffing requirements and allotment of available resources to various phases of projects. The Project Manager establishes work plans and coordinates staffing for each phase of project and arranges for recruitment or assignment of project personnel. The Project Manager identifies functional or cross-functional requirements and resources required for each task.	\$4,392.54
Consulting Day Rate - Vice President	The Vice President has overall accountability for business solution programs. Vice Presidents may be responsible for product delivery and/or financial management of client engagements. A Vice President performs independent quality assurance reviews of program performance and deliverables. They lend thought leadership to engagement teams in developing creative solutions to client problems.	\$5,054.91
Consulting Day Rate - Consulting Director	The Consulting Director has overall accountability for business solution programs and oversees and manages multiple client relationships. Consulting Directors may be responsible for product delivery and/or financial management of client engagements. They lend thought leadership to engagement teams in developing creative solutions to client problems.	\$5,473.25
Consulting Day Rate - Analyst	The analyst has industry experience in the relevant subject matter. This individual will use subject matter expertise and/or industry focus expertise in fulfilling the interpreted customer specification. The analyst provides thought leadership related to current and future customer plans with regard to the stated client need.	\$5,717.28

Research

Highly objective and rigorous, Forrester's research is the foundation of all of our offerings and directly focuses on providing you with the most valuable, relevant research to match your needs. Our core research and tools provide you with forward-looking, actionable guidance aligned to your key initiatives and those of your target clients, competitive intelligence, and one-on-one time with our experts.

Forrester Research is written for 12 leadership roles:

Marketing and Strategy Professionals — M&S Research: Chief Marketing Officer, B2B Marketing, B2C Marketing, Customer Experience, Customer Insights, Digital Business Strategy

Technology Management Professionals — BT Research: Chief Information Officer, Application Development & Delivery, Enterprise Architecture, Security & Risk, Sourcing & Vendor Management

Playbooks are Forrester's framework to help you deliver on your top initiatives using our four-phase, step-by-step approach — discover, plan, act, and optimize. This life-cycle approach will guide you to better business decisions and outcomes. Each playbook includes an Executive Overview plus 12 additional reports spanning the four phases. To date, Forrester has more than 60 playbooks that are updated annually with current insight from our experts.

Market Overviews provide an objective analysis and overview of technology providers.

Trends and Predictions give insight into how a technology, marketing, or strategy category will unfold.

Quick Takes analyze a significant market event, such as an IPO or a product announcement.

TechRadar™ is Forrester's methodology to describe and plot a technology or process according to its ecosystem maturity, business value-add adjusted for uncertainty, and future trajectory. TechRadar helps clients develop a technology road map using objective analysis and perspectives.

Forrester Wave™ is our transparent and objective evaluation of providers in a software, hardware, or services market. It evaluates their market positions across Current Offering, Strategy, and Market Presence. Forrester Wave reports and spreadsheets expose the criteria we use to grade the providers' offerings and how we score and weight those criteria.

Analyst Inquiry enables clients to ask analysts questions related to our research during a 30-minute strategy session. Our thought leaders demonstrate how their research applies to your initiatives, providing insights that lead to greater confidence in your decisions. A self-schedule tool is available.

Application Development Strategy, Structure, And Sourcing Playbook			
APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS			
Executive Overview: The Age Of The Customer Changes Everything For AD&D Leaders			
DISCOVER	PLAN	ACT	OPTIMIZE
Vision: Accelerating App Development And Delivery To Formula 1 Speeds	Assessment: Map The Gaps In Your BT Apps	Organization: Reforming AD&D Organizations For Customer Obsession: The Three Models	Performance Management: Manage The Performance Of Your Apps Portfolio
Landscape: How Customer Obsession Is Remaking The AD&D Landscape	Strategic Plan: Enable A Customer-Centric BT Agenda With These Four Application Strategies	Processes: Link Application Processes To Business Processes	Benchmarks: Manage The Performance Of Your Apps Portfolio
Business Case: Transform Application Delivery To Improve Business Agility	Road Map: Planning The Approach To Structuring App Dev	Tools And Technology: Customer Obsession Will Remake AD&D Tools And Supporting Technologies	Continuous Improvement: Improving Application Capabilities



Research Inquiry is available as an unlimited service to answer questions related to our written research. Within 36 hours, research specialists will help you locate the right pieces of research for your tactical or strategic issues.

Dedicated Client Relations Specialist: Each client receives a dedicated client relations specialist to manage research inquiries, briefings, and questions related to www.forrester.com.

Planned Research Tool: Clients can access a calendar of upcoming research on Forrester.com to plan for briefings and inquiries as well as to plan webinars around a major report release.

Dedicated Account Manager: Every Forrester client, regardless of size, receives a dedicated account manager to support their needs throughout their Forrester journey. This extends from Forrester Research Member and Reader onboarding and ongoing questions on how Forrester can support your initiatives to partnership reviews.

Courtesy Views: Get more out of your membership by accessing up to 10 reports published to roles outside of your research subscription. For example, if you are a Business Technology Research client, you can access up to 10 reports published to corresponding Marketing & Strategy roles.

Courtesy Inquiries: Enhance your understanding by scheduling up to four Courtesy Inquiries to speak with a Forrester analyst outside of your research subscription. For example, if you are a Marketing & Strategy Research client, you can schedule up to four 30-minute Analyst Inquiries with Business Technology analysts.

Document Review is an Inquiry service for clients to receive feedback on business-technology-related or marketing and strategy-related RFPs, contracts, and strategy documents. With Age of the Customer Research access, analysts provide reviews of these documents up to 20 pages.

Webinars are developed and led by our analysts, who focus on the key trends and technologies that affect your business. These interactive presentations are followed by an open forum for questions.

Events: A single ticket to a Forrester Event is also included in all orders with at least one Research Member seat. These forums allow you to learn from thought leaders, hear from your peers, and engage with Forrester analysts.

Forrester.com is the central place to access and manage services, find and read research, schedule Inquiries, and manage your account and personal preferences. Stay informed about the latest Forrester reports and Webinars by creating alerts based on your role or a custom term.

Forrester Reader for the iPad helps you quickly and easily find the latest reports, playbooks, charts and figures; save research to your personal reading list for offline reading; and share excerpts, charts, and report links.

Forrester Insights for the iPhone helps you access our research anytime, anywhere. In addition to intuitive search and a high-resolution display, the Forrester Insights app features a save function that syncs across web and mobile, share functionality to keep colleagues and teams up to date, and a way to connect with Forrester analysts to have your questions answered within one business day.

RESEARCH MEMBER - (PART # R_M)

BT Research Members have unlimited access to Forrester's research for Technology Management Professional roles: CIO, Application Development & Delivery, Enterprise Architecture, Security & Risk, Sourcing & Vendor Management.

M&S Research Members have unlimited access to Forrester’s research for M&S Professional roles: CMO, B2B Marketing, B2C Marketing, Customer Experience, Customer Insights, Digital Business Strategy. Research Member level of access also includes:

- › Unlimited use of our client service department
- › Analyst Inquiry
- › Unlimited webinars
- › Dedicated account team
- › BT Document Review (up to 20 pages)
- › Up to four “click-and-share” documents
- › Personalized web portal with alerts
- › Peer networking through both online and regional events

Please see [our website](#) for more examples of Forrester’s research capabilities.

Quantity:	Total Price:	Quantity:	Total Price:
1	\$29,262.97	6	\$87,950.45
2	\$46,668.85	7	\$93,178.92
3	\$63,836.99	8	\$98,407.39
4	\$73,279.48	9	\$103,635.87
5	\$82,721.97	10	\$108,864.34

RESEARCH READER (PART # R_R)

BT Research Readers have unlimited access to Forrester’s research for Technology Management Professional roles: CIO, Application Development & Delivery, Enterprise Architecture, Security & Risk, Sourcing & Vendor Management.

M&S Research Readers have unlimited access to Forrester’s research for M&S Professional roles: CMO, B2B Marketing, B2C Marketing, Customer Experience, Customer Insights & Analytics, Digital Business Strategy. Research Reader level of access also includes:

- › Unlimited use of our client service department
- › Dedicated account team
- › Personalized web portal with alerts

Please see our website for more examples of Forrester’s research capabilities.

Quantity:	Total Price:	4	\$28,525.19
1	\$9,285.21	5	\$34,953.40
2	\$15,668.76		
3	\$22,096.98	Quantity:	Total Price:

6	\$41,381.62	9	\$55,724.57
7	\$46,162.60	10	\$60,506.56
8	\$50,943.59		

LEADERSHIP BOARDS (PART # LB_U) (FOR RENEWAL ONLY)

Leadership Boards are an exclusive network of peers, analysts, and advisors connecting clients with leading practices to accelerate business growth. Members are part of a trusted, pre-qualified global community of leaders within their discipline. Participation includes facilitated peer-networking events and one-to-one peer exchanges, on top of forward-looking research insights designed to tackle members' most pressing challenges and change initiatives.

In addition to the benefits of a Forrester Research Member membership, a Council membership adds:

- › A dedicated advisor
- › Peer network
- › In-person events
- › One (1) Forrester Forum ticket
- › Virtual events
- › Exclusive content
- › Online community

BUSINESS TECHNOLOGY LEADERSHIP BOARD COUNCILS

- › Application Development & Delivery Council
- › Business Technology Strategy Council
- › The CIO Group
- › Enterprise Architecture Council
- › Security & Risk Council
- › Sourcing & Vendor Management Council

MARKETING & STRATEGY (M&S) LEADERSHIP BOARD COUNCILS

- › B2B Marketing Council
- › B2C Marketing Council
- › The CMO Group
- › Customer Experience Council
- › Customer Insights & Analytics Council
- › Digital Business Council

Please see our website for more information regarding our Leadership Board and Connect offerings

Quantity:	Total Price:	4	\$117,395.22
1	\$32,871.54	5	\$145,570.07
2	\$61,045.51	Quantity:	Total Price:
3	\$89,220.36	6	\$173,744.92

7	\$173,744.92	9	\$258,269.48
8	\$230,094.62	10	\$286,444.33

LEADERSHIP BOARDS – INSIGHT (PART # LB_I) (FOR RENEWAL ONLY)

Leadership Boards Insight Seats may only be sold to existing seat holders who have already purchased a corresponding Leadership Board Council seat.

Please see our website for more information regarding our Leadership Board and Connect offerings

Quantity:	Total Price:	Quantity:	Total Price:
1	\$17,166.25	6	\$75,610.82
2	\$34,333.08	7	\$80,838.80
3	\$51,499.62	8	\$80,066.79
4	\$60,941.23	9	\$91,294.77
5	\$70,382.83	10	\$96,522.75

Age of the Customer (AoC) Research Member with Advice

Forrester's "Age of the Customer" research, including not just our BT research, benchmarking, frameworks, tools, templates, and vendor evaluations, but also our customer and partner-focused strategy research. This includes access to all of Forrester's employee, digital, customer experience content along with our marketing and communication expertise, research content and frameworks. The resulting research services provide our clients the insights and tools:

- › Rebuild operations across business and technology teams;
- › Prioritize and budget a shared BT strategy that can drive customer value and growth;
- › Engage citizens and global partners in innovative ways proven to build trust and strengthen relationships; and
- › Unlock the potential of a diverse workforce empowered to drive mission success
- › Visualize, strategize, and execute their most ambitious programs with greater ease and confidence thanks to Forrester's proven techniques

In today's age, one cannot exist without the other, and Forrester's AoC access ensures that our clients have access to research and tools across the full platform, partner (e.g., customers, employees, other agencies, and vendors), and practice lifecycle.

Each Age of the Customer Research Member with Advice License purchased is a User License that entitles its holder to:

- › **Age of the Customer Content Access.** Unlimited Access to Forrester's BT & MS research content and interactive webinars along with AOC Exclusive Research Content and Webinars
- › **Age of the Customer Inquiry.** Unlimited Analyst Inquiry with the Forrester Analysts who produce Forrester content and drive global thought leadership this includes Analysts aligned to industries such as Public Sector, Healthcare, Finance, and other key sectors
- › **Leadership Coaching and Skill Development.** Engage with Forrester SMEs for personal or team skill development. Discuss executive leadership challenges with former C-level executives or build technical prowess via session with our deep technical experts. Clients have the flexibility of working with an aligned Analyst via quarterly sessions; conducting strategy meetings with a host of area experts; or conducting a single agency-wide strategy session.
- › **Peer Networking.** Peer networking through both online and regional events
- › **Unlimited Access.** All deliverables associate with Research Member
- › **Event Access.** Includes one (1) Forrester Event Ticket to attend a multi-day Forrester Summit or similar marquee event. [Please see our events calendar](#) for more information.

Please see [our website](#) for more examples of Forrester's research capabilities.

Pricing (each): \$42,557.68

Executive Programs – Part # EP_CIO

Executive-level coaching for C-level government leaders and to help drive your customer-obsessed strategies and accelerate your team's ability to deliver results on your most strategic initiatives. Forrester Executive Programs help you navigate and win in the age of the customer, delivering everything Forrester has to offer – customized to your strategic initiatives and goals.

Executive Programs provide you with:

An Executive Partner to provide one-on-one coaching and help you establish and tackle your most important initiatives, delivered through recurring 1:1 meetings and ongoing “on-call” conversations and support.

Age of the Customer research access including unlimited access to all of Forrester’s Marketing & Strategy and Business Technology research.

Peer networking through both online and via regional events with content specifically designed for CIOs and their peers

Onsite strategy sessions to align your team on crucial growth initiatives.

Team support to accelerate your team’s ability to deliver results on your most strategic initiatives.

Curated research and analysis to guide and ensure confidence in your decisions.

On demand access to Forrester experts to accelerate progress toward your desired outcome.

Invitation to one (1) Forrester Forum to meet with peers and other CMOs and CIOs.

Please see [our website](#) for more information regarding our Executive Program and Connect offerings.

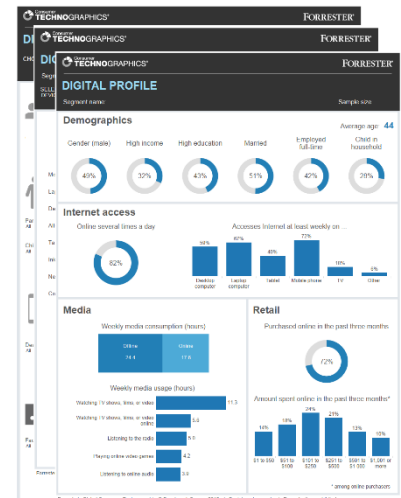
Pricing (each): \$70,242.82

Consumer Technographics

Consumer Technographics explores a deep range of behaviors around how consumers use technology, shop, travel, bank, consume media, or get services, as well as providing insights into their customer journey. Consumer Technographics is based on more than 400,000 surveys completed annually across 19 countries. Covering more than 1,500 leading consumer brands in North America, Europe, Asia Pacific, and Latin America, our globally consistent survey questions enable you to compare consumers across geographies, and repeated survey themes allow for trending data over time.

Our quantitative, qualitative, and behavioral methodologies enable clients to explore the needs of new or underserved segments in your market; build stronger experiences for existing customers; shape digital priorities based on consumer technology adoption and expectations; and understand and adapt to the influencers in consumer purchase journeys.

Consumer Technographics clients have access to a variety of resources, including a personalized data service from our data insights team; interactive data dashboards and charts; proprietary segmentations on the digital, mobile, social, financial, and retail behaviors of your customers; expert analysts to help you understand what the data means for your business strategy; a data self-service tool for quick answers on the go; and exclusive Consumer Technographics insights reports.



CONSUMER TECHNOGRAPHICS WORKGROUP: NORTH AMERICA (PART# CT_NA_WG)

Pricing: \$23,492.19

CONSUMER TECHNOGRAPHICS ADD-ON RETAIL AND TRAVEL: USA (PART# CT_USA_AO_RT)

Pricing: \$19,540.30

CONSUMER TECHNOGRAPHICS ADD-ON TECH, MEDIA AND TELECOM: USA (PART# CT_USA_AO_TMT)

Pricing: \$19,540.30

CONSUMER TECHNOGRAPHICS ADD-ON FINANCIAL SERVICES: USA (PART# CT_USA_AO_FS)

Pricing: \$19,540.30

CONSUMER TECHNOGRAPHICS ADD-ON HEALTHCARE AND GOVERNMENT: USA (PART# CT_USA_AO_HG)

Pricing: \$19,540.30