THE YANKEE GROUP
A Primark Company

Customer Relationship Management Strategies
REPORT Vol. 1, No. 1—April 1999

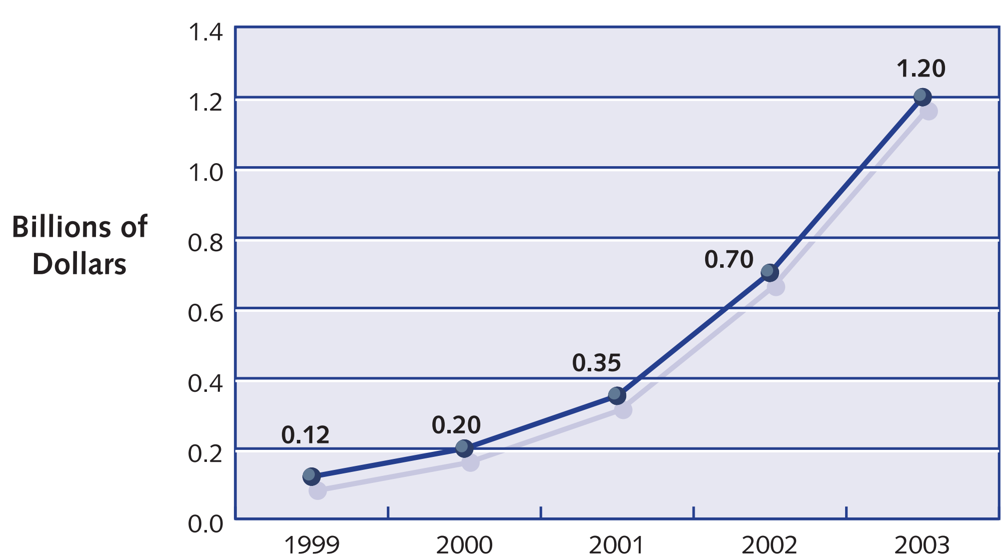
The Users Speak: Current and Future Plans for Web-Based Customer Care

Executive Summary

Web-based customer care has gone from being a fanciful future consideration for customer care managers to a highly prioritized item, as organizations at a high level make customer relationship management (CRM) a business and IT priority. While most of what is being done at this time involving the Web is primarily dabbling, involving a handful of agents and limited pilots, companies expect to move more rapidly in the next two years to make the World Wide Web (WWW) a strategic part of their customer care initiatives.

This Report presents the results of our survey of customer care managers regarding their plans for Web-based customer care. Based on current attitudes and the state of the market, the Yankee Group expects the initial ramp up of the market for Web-based call centers and customer care to be gradual, as it is currently a hodgepodge of internal development, point solutions, emerging suites from a large number of start-ups, and cosmetic Web "touch-ups" of a number of call center applications. The maturation of the applications market and the internal streamlining of customer care organizations should result in more dramatic growth into the millennium (see Exhibit 1).

Exhibit 1
Web-Based Call Centers Revenue Forecast
Source: the Yankee Group, 1999



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I. Introduction

For over two years, the Yankee Group has discussed the potential of the World Wide Web as a customer interaction channel, and the benefits of its integration with other forms of customer care, most notably the call center. The interest in opportunities represented by the Web for customer service and customer management has consistently been strong, but until recently, deployment by users has been cautious and very limited in scope. Call center managers, in particular, dealing in many cases with high agent turnover (over 25% in major markets) and continued cost pressures, have been loathe to disrupt their very finely tuned operations by introducing service through another medium, particularly one that is as mercurial as the Web.

Attitudes appear to be shifting, however, as the continued growth of Internet users, their demand for electronic interaction, and the increasing sophistication of electronic customer care solutions becomes impossible for customer care managers to ignore. The Yankee Group conducted an in-depth telephone survey of 100 customer care executives at *Fortune 1000* corporations, to determine current attitudes toward Web-based customer interaction, future plans, and perceived obstacles, and their comfort level with various solutions providers, given the newness of the market. The rest of this Report summarizes results from the survey and provides a snapshot of the current state of the market.

Exhibit 2 provides some general characteristics of the survey population.

II. Use of the Web for Support: Current and Expected

At present, the majority of survey respondents (57%) indicate they use the Web for customer support, and of those that do not, over half (55%) plan to use it for support in the next 12 to 18 months. This is shown in Exhibit 3. These results are a good indicator of a general commitment to the Web as a support medium, though the Yankee Group has found that for many companies, their current use of the Web for support is typically perfunctory and passive—usually some basic information or answers to frequently asked questions (FAQs).

We then asked companies when they expected to *actively* commit to using the Web strategically to augment current support efforts. The results, shown in Exhibit 4,

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Exhibit 2
General Characteristics of Survey Respondents

Source: the Yankee Group, 1999

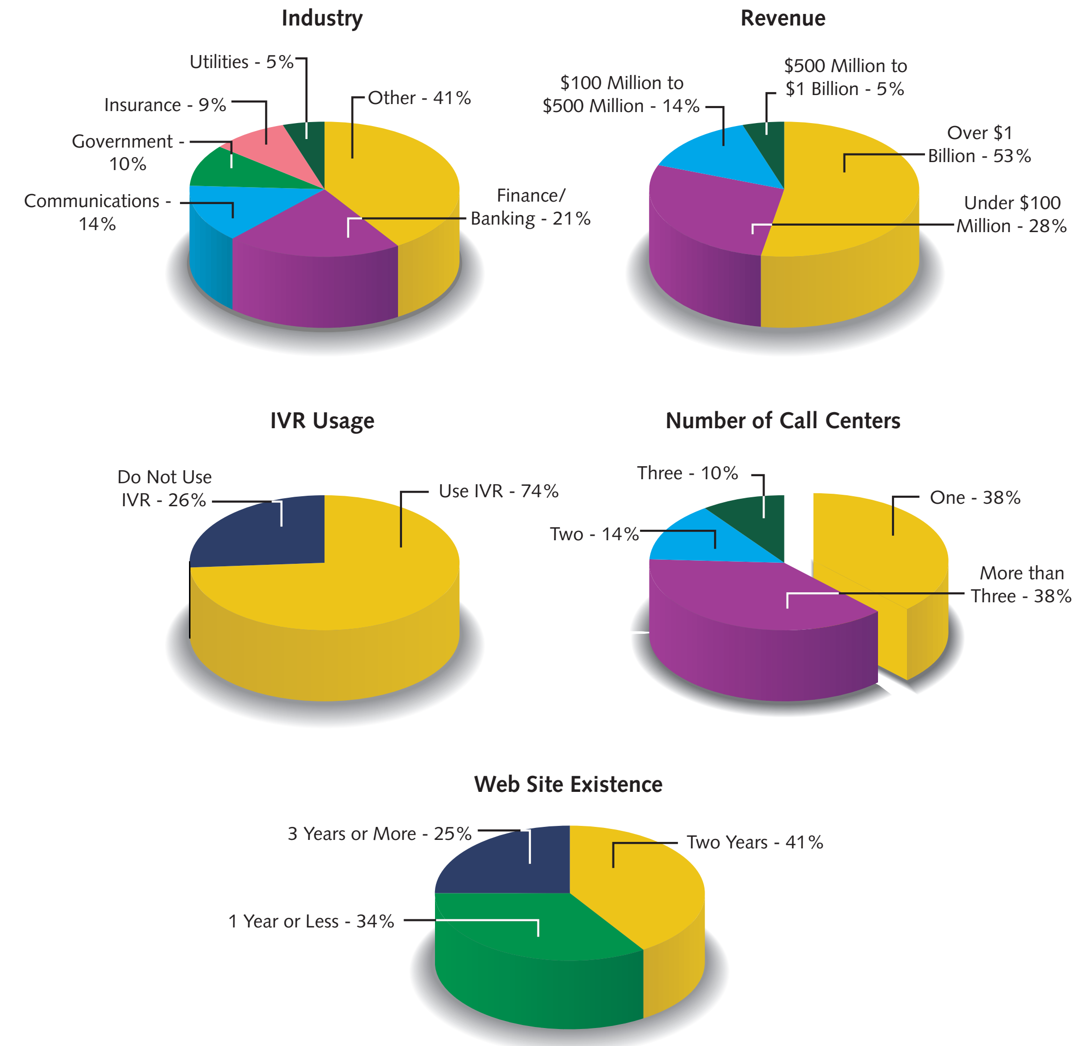

Exhibit 3
Current and Planned Use of the WWW for Support

Source: the Yankee Group, 1999

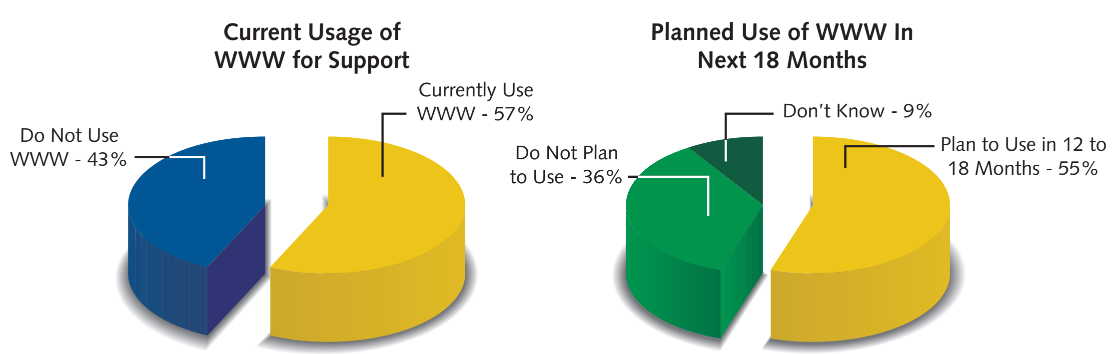

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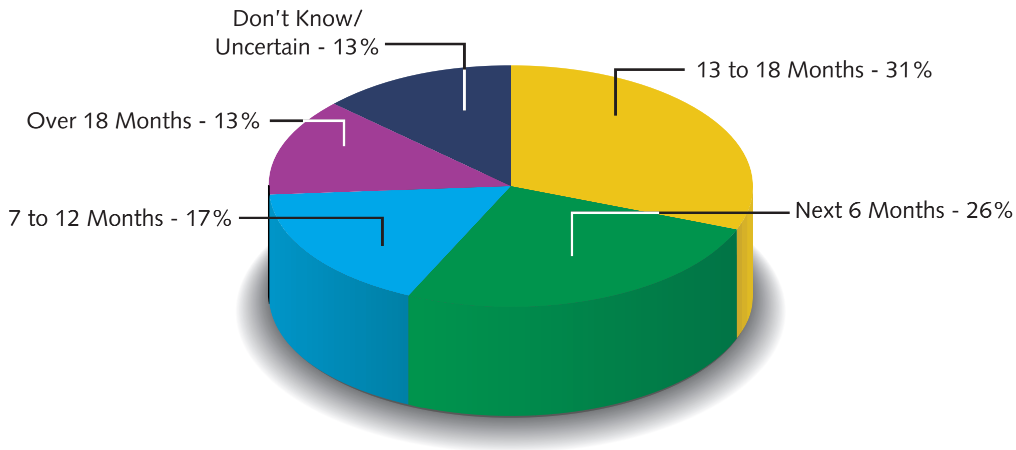
Exhibit 4
Timing of Active Commitment to the Web for Customer Support
Source: the Yankee Group, 1999



indicate a division among respondents—just under half (43%) expect to commit in the next 12 months, while the same percentage expect it will be over 12 months before they actively commit. The implication here is that a significant number of companies plan to move ahead sooner, but an equally significant number of companies feel constrained at present, most likely by internal resource issues and their concerns about the maturity of various applications. Looking at the information in a more positive light, **nearly three-quarters of companies surveyed do plan an active commitment to Web support in the next 18 months.**

This optimism is further borne out by the data presented in Exhibit 5, showing the percentage of support requests handled by companies on the Web currently, and what is expected in two years. Currently, the vast majority of companies (80%) handle *no more than 10% of requests* through the Web, and no one company handles more than 25% of its support that way. This is expected to change dramatically in two years, as two-thirds of companies expect to handle *at least 25%* of their requests through the Web.

III. Web Support Applications of Greatest Interest to Users

The previous section makes it clear that companies see the Web as a channel that will service a significant percentage of customer inquiries over time. There are several ways in which companies can serve customers over the Web, from self-service to deferred service to real-time interactions using chat and even IP telephony. Exhibit 6 indicates current deployment of various Web interaction technologies, and what the likely commitment will be in 12 to 18 months.

While deployment is limited currently, companies appear committed to giving customers a number of options for support in the future, with the most popular options being placement of icons on a Web site to request an agent callback, to request an E-mail response, and to enable self-service through a comprehensive problem-resolution knowledge base. When companies were asked which of the Web options are likely to

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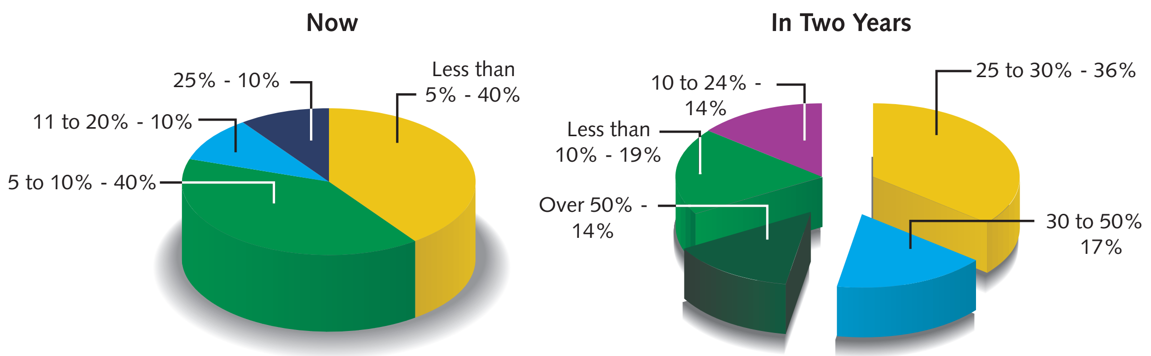
Exhibit 5
Percent of Support Requests Handled by the Web
Source: the Yankee Group, 1999



make the greatest impact on support and sales efforts in the future, a self-service knowledge base was mentioned far more often than any of the other options, although it is notable that an even larger percentage of respondents said they did not know. This implies the following:

- **Companies view the greatest potential of the World Wide Web in the short term as a self-service vehicle.** This is understandable given the greater capabilities of the Web (relative to other self-service channels like IVR) in presenting information in an interactive manner, and the potential to reduce direct interaction with live agents, always a priority for cost-conscious customer service managers. Currently, companies are leveraging the Web as a self-service medium in a very limited manner, and for many of these companies, it would be premature to jump into real-time interaction through such a new medium until self-service and deferred-service capabilities are more fully developed. For example, problem resolution on several Web sites is limited to the most basic of answers to the most routine inquiries, and though a high percentage of companies provide E-mail response on the Web, the actual response times are frequently poor and the level of response also very basic. There is much room for improvement in these areas.

Exhibit 6
Web Interaction Applications/Technologies Deployed and Favored by Users
Source: the Yankee Group, 1999

	Use Now	Will Use in 12–18 Months	Will Have Greatest Future Impact
Self-Service Knowledge Base	20%	44%	31%
E-Mail Response Icon	41%	46%	5%
Callback Icon	16%	48%	9%
Chat Request	3%	29%	5%
Real-Time Request Using VoIP	—	36%	9%
Don't Know	—	—	38%

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- **Education is still required for many companies not fully aware of the options for Web interaction.** The significant number of respondents who are undecided regarding the impact of any given Web interaction technology is a sign of the immaturity of the market, and of the fact that **many of the companies providing Web interaction applications are small and have yet to get on the radar screen of larger users that still rely heavily on the larger established vendors and integrators** in the call center space. The Yankee Group believes that a few "stars" are emerging with multifaceted Web interaction platforms that integrate well with existing customer care applications and infrastructure, and that will catch the attention of customer care managers. In the short term, however, the momentum for more widespread awareness is likely to be driven by established vendors and integrators that partner with (or acquire) smaller players.

Overall Spending Priorities

The increased interest in Web interaction has to be considered within the overall spending priorities of customer care and call center managers. Companies are not investing in Web interaction for its own sake—they want it to integrate well with existing call center and customer care infrastructure, and the ultimate goal is an enhanced customer interaction experience, in which customer needs are handled gracefully and effectively regardless of medium. The spending priorities of call center managers for the next two years are shown in Exhibit 7.

As one might expect, the most pressing spending requirements of managers relate to existing infrastructure, in particular the upgrading of existing automatic call distribution (ACD) platforms and the implementation of computer telephony integration (CTI), with over half of respondents specifying these as "high priority." **What is most notable, however, is the recognition by managers that agent skills will be a significant investment as new channels for customer interaction (such as the Web) become more prominent.** The retraining of existing agents and hiring of new types of agents are high priorities for just under half of survey respondents, as companies have found that the adjustment process for call center agents to transition to an electronic medium, one that requires greater facility with Web navigation and writing skills, can be time-consuming and costly.

Beyond agent retraining/acquisition and upgrading of existing platforms, most other options are lesser priorities for most of the companies surveyed. This does not contradict the results described earlier regarding users' affinity toward Web interaction deployment; what it does make clear is that investment will be limited for many companies until their core infrastructure and human capital are brought up to speed appropriately. The most prioritized Internet interaction investments are a self-service knowledge base and E-mail automation, both a high priority for roughly 30% of respondents.

The short-term implication for vendors is that they will be more successful selling their platforms in conjunction with existing call center platform vendors, systems integrators, or service providers that can provide "cyber agents" on an outsourced basis and gradually manage knowledge transfer to existing agents at a user site. Companies

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Exhibit 7
Spending Priorities for Call Center/Customer Care Managers
Source: the Yankee Group, 1999

	Percent of Respondents Identifying Technology as "High" or "Highest" Priority for the Next Two Years
More Advanced ACD Capabilities	53%
CTI	51%
Retraining of Agents to Handle More Diverse Inquiries	49%
Hiring of New Types of Agents to Handle More Diverse Inquiries	45%
IVR/More Advanced IVR	44%
Network of Existing Call Centers	36%
Building of Extensive Web-Based Self Service Knowledge Base	32%
Automation of E-Mail	29%
Outbound Applications	25%
IP Telephony	25%
Chat	14%

presently remain skittish about exposing existing agents to what they perceive to be time-draining, unfamiliar Web support activity, and early adopters that are engaged in pilots or limited deployments of E-mail/Web support have tended to dedicate a small and separate group of agents to E-mail and Web activity. **Vendors that can aid users in transitioning their workforce and making the integration with existing systems more seamless will gain traction more quickly.**

The issue of various solutions providers for a Web interaction deployment, as well as users' comfort level with such providers, is discussed in the following section.

IV. User Confidence in Various Web Care Solutions Providers

The issue of implementing a Web-based call center and customer care solution is, for many companies, clearly more complex than deploying a simple stand-alone software package. There are many types of vendors that could provide a Web interaction solution, from existing call center hardware and application vendors, to systems integrators, to service providers that would provide a solution on an outsourced or network basis. We asked companies to rate their level of confidence in these companies as far as their ability to provide an effective Web-based customer care solution. The results are illustrated in Exhibit 8.

Respondents were also asked which single class of solutions provider they had the most confidence in; the results of that question are shown in Exhibit 9.

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Exhibit 8
Level of Confidence in Solutions Providers for Web-Based Customer Care

Source: the Yankee Group, 1999

	Percent of Respondents Expressing "High" or "Highest" Level of Confidence
Systems Integrator: Call Center	59%
Systems Integrator: Internet	57%
Call Center Applications Provider	48%
Front-Office Applications Provider	46%
Internet Service Provider	46%
Long-Distance Carrier	44%
Large/Big-Five Systems Integrator	37%
Computing Hardware Vendor	37%
IVR Manufacturer	35%
ACD Manufacturer	33%
Independent Web Developer	33%
Help Desk Vendor	30%
Local Exchange Carrier	26%
Back-Office Applications Vendor	19%

	Percent of Respondents Expressing "Little" or "No Confidence"
Local Exchange Carriers	49%
Long-Distance Carriers	35%
Back-Office Vendors	35%
Large Systems Integrators	25%

The following implications can be drawn:

- Users recognize the issue of Web-based customer interaction and support as an *integration* issue, based on the degree of confidence they display in systems integrators. **Note that traditional large systems integrators, such as the Big 5 accounting firms, do not rank highly, however—it is the specialized systems integrators, those with specific call center and Internet experience, in which close to 60% of users have a high degree of confidence.** This is partially a reaction by users against the past excesses of large integrators with an imperfect understanding of the nuances of customer care environments, but it is also a belief that **what is required to make Web-based customer interaction successful is a leaner type of integrator with deeper understanding of customer care delivered through specific channels.**

- Nearly half of respondents have a good deal of confidence in applications vendors in the call center and CIS markets as solutions providers. This is

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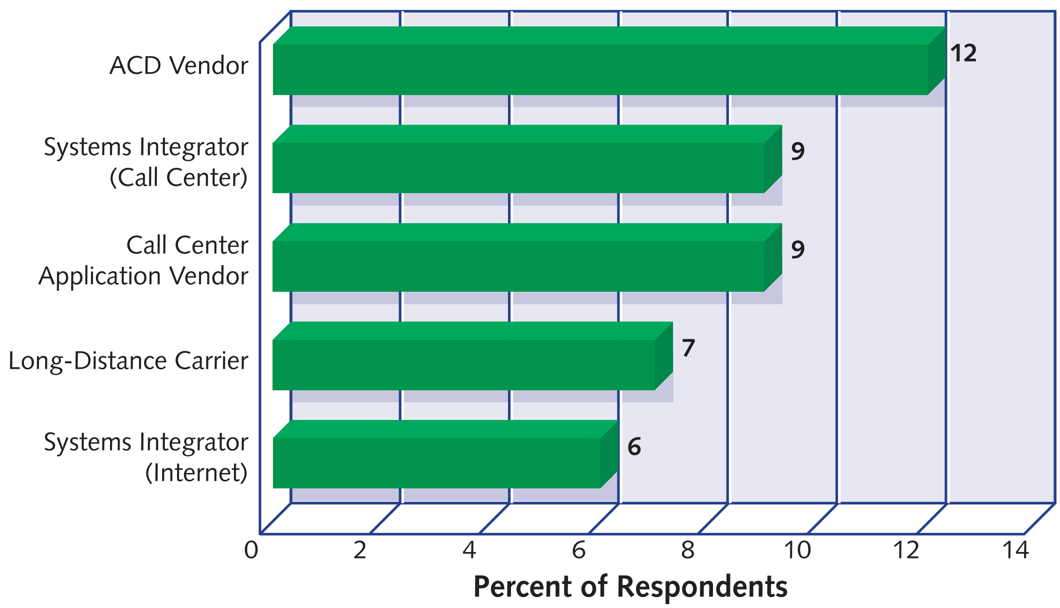
Exhibit 9
External Solutions Provider in Which Users Have the Most Confidence
Source: the Yankee Group, 1999



understandable and commendable in the Yankee Group's opinion, as we believe a software approach to Web-based call center and customer care solutions is more flexible and attainable than one tied heavily to hardware. Users further reinforce this point, as a much smaller percentage show confidence in ACD and IVR vendors as solutions providers.

- A surprisingly high percentage of respondents (44 to 46%) have strong confidence in Internet service providers (ISPs) and long-distance carriers as solutions providers. This is surprising given the strong premise orientation of call center solutions, and the relatively limited influence and portfolio of offerings delivered by network service providers historically to the call center (outside of transport). We believe user confidence relates to the role service providers can play in 1) outsourcing of dedicated agents for Web care, 2) hosting of Web-based applications, and 3) providing increasingly viable IP-based networks for increased bandwidth and real-time communications.

- Companies expressed much less confidence in local exchange carriers (LECs)—not surprising, given the poor ability of the LECs to deliver IT solutions presently. A notable percentage of respondents also had reservations about other carriers, back-office applications vendors, and large systems integrators, and the Yankee Group expects that this will continue to be the case until these companies increase their profiles in the Web care solutions space.

- When pressed to choose a single vendor that they had the most confidence in, users largely abstained—no one vendor was named by more than 12% of

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respondents. Interestingly, the vendors chosen were mostly call-center–related, with ACD vendors leading the pack. This is an indication that when push comes to shove, users will stick with the one they know best until outside solutions providers make a better case for themselves, but **it also demonstrates strongly that users believe an effective Web-based customer care solution is one that involves multiple vendors.**

V. Issues, Obstacles, Expected Costs

Users clearly have high expectations as to what Web-based call center and customer care solutions can do for them, and what types of providers can help them build such solutions. They also seem to realize that grafting on point solutions costing in the range of four to five figures to solve part of the problem using the Web is not likely to succeed—the scope of the problem, given the scale of their current customer support infrastructures, is vast and not easily handled by the packaged solutions that are just emerging from a number of start-up companies.

Users were asked to name the biggest obstacles to deploying an effective Web-based customer care solution, and Exhibit 10 shows the results. Cost and legacy integration were the issues brought up most often; for a certain percentage of respondents, a Web-based call center was a lower priority, most likely because of other pressing IT development issues. Based on responses to other questions, the implication here is that cost **is not just the cost of the necessary applications for Web customer care, but also retraining costs for agents and systems integration to ensure the Web solution is tied into existing systems effectively.**

Exhibit 11 illustrates respondents' expectations for a Web-based customer care solution budget: a quarter of respondents feel the cost should be under $100,000, another 20%

Exhibit 10
Largest Obstacle Perceived by Users to Deploying an Effective Web-Based Customer Care Solution
Source: the Yankee Group, 1999

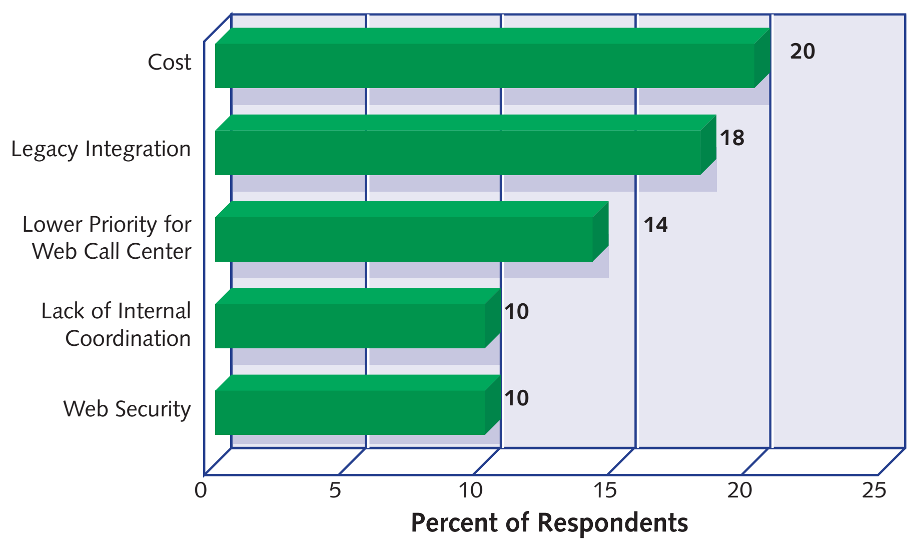

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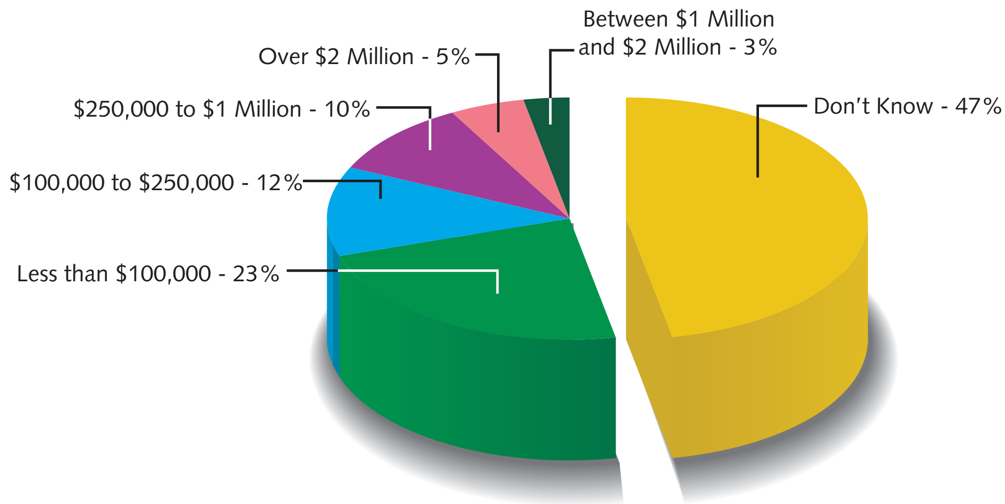
Exhibit 11
Estimated Budget for Web-Based Call Center Solution
Source: the Yankee Group, 1999



feel the budget ranges from anywhere between $100,000 and a million (the more typical range for other enterprise "packaged" applications), and nearly half still are not certain what a reasonable budget is, again pointing to the need for users to be educated on the options.

VI. Notable Segments: Revenue, Web Experience

Some notable segments emerged from a closer analysis of the survey data, specifically companies with less than $1 billion in revenues, and those with greater Web experience (companies whose sites have been up for over two years). Both these segments show a greater tendency to move forward aggressively with Web-based customer care, and to prioritize spending in new technology areas. Given their quickness to move with new technology, these segments tend to favor internal development, but they are more likely to be open to external packaged solutions that are cost-effective over time.

Companies with under $1 billion in revenues:

- Handle more of their support requests through the Web currently (33% handle over 10% of requests through the Web vs. 16% of companies with $1 billion+ revenue);
- Are more likely to build a Web-based solution internally (70% believe their solution will be internal vs. 48% of larger companies); and
- Are more likely to assign a high priority to spending on new types of agents for electronic interactions, E-mail automation, and a self-service knowledge base.

Likewise, companies with greater Web experience:

- Are more likely to build a Web-based solution internally;

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- Are much more likely to prioritize spending for new agents and new technology across the board (knowledge base, E-mail automation, ACD upgrades, IVR upgrades, even IP telephony);

- Have a higher level of confidence in call center applications vendors relative to the overall respondent base, and a lower level of confidence in everyone else; and

- Are more likely to have issues with legacy integration, and tend to have higher estimates for the cost of a Web-based care solution (over $500,000).

VII. Conclusions

Web-based customer care remains in its early stages from the viewpoint of many users, even as new vendors continue to emerge and add functionality to their product suites. The survey data clearly indicates that users intend to make the WWW a strategic part of their customer management strategies in the next two years, and expect a much greater percentage of interactions to take place through the Web. But the path that users plan to take in order to make the Web a more strategic vehicle for customer service remains cloudy:

- A more comprehensive self-service strategy is the clearest and most obvious path to take for most users, simply because many Web sites have plenty of room to evolve beyond the rudimentary information they provide users, and the savings represented by having customers manage themselves on the Web, rather than consulting with a live agent, remain substantial. Such initial "savings" can be deceptive (as with the evolution of IVR, Web-based self-service tends to reduce routine inquiries but can generate more complex follow-up inquiries for agents); however, they represent a strong and obvious business case for customer care managers to make to senior management for investment in a new medium.

- Deferred service using E-mail automation is another increasingly popular means for customer care managers to manage customers electronically, given the rapid growth of E-mail received by organizations and the glaringly inadequate response times of most of these organizations. The availability of software for routing, queuing, and auto-response has caught the attention of users, and call center vendors themselves have built their own products or partnered with leading independents to offer such products to users.

Companies feel they cannot move toward more comprehensive Web-based customer management solutions that incorporate real-time interaction, however, without new or retrained agents to handle the new electronic interactions. In addition, while current constraints on time and resources may make limited pilots and point solutions attractive, in the long term, customer care managers are looking to specialized integrators with a strong understanding of the specific requirements of call center and Internet interaction to help build an expansive, tightly integrated solution for Web-based customer care. Such a solution would include the ability to manage multiple channels for customer interaction consistently, and the ability to escalate the customer gracefully from self-service, to automated service using E-mail or Web messaging, to live interaction via the Web or the call center.

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Until companies see a more mature set of solutions and solutions providers capable of delivering such multichannel customer care frameworks, customer care managers are likely to move cautiously, and some will build parallel customer service frameworks for different channels (Web, call center, E-mail) with little integration. There are stand-out products now with a strong Internet foundation that provide highly capable self-service or automation components (Silknet, Kana, netDialog, Business Evolution, Webline), but more comprehensive solutions are still emerging. **The Yankee Group expects that the winners will be those that evolve beyond a strict focus on one channel, that move seamlessly between multiple channels, integrate easily with other applications, and can be modified rapidly to accommodate the continuously changing needs of the customer.** Existing call center vendors, front-office applications companies, Internet software companies, and systems integrators are moving rapidly to build solutions that can meet the needs of the new customer-centric, multichannel, increasingly Internet-focused organizations.

Further Reading

"Cyber Call Centers 1998: From Internet-Enabled to Internet-Architected Call Centers," *Yankee Group Report, Telecommunications*, Vol. 13, No. 3, February 1998.

"Fast and Personal: E-Mail Response Systems," *Yankee Group Report, Internet Computing Stategies,* Vol. 3, No. 4, March 1998.

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