



Strategic Marketing at Cisco



Dean Eysers

Senior Director - Strategic Marketing

SVPMA - April 2nd 2008

Agenda

Who?

Strategic Marketing @ Cisco

Customer & Custom Research

Market and Competitive

A Bigger Picture



My Background



- **Dataquest Europe**
 - Inquiry Desk
 - Mobile Analyst
 - European Telecoms Director
- **Gartner**
 - GVP Communications & Verticals Research
 - Technology Vendors - Product Manager
- **Cisco**
 - Competitive Leadership Team
 - Strategic Marketing - Market & Competitive Intelligence

Product Management/Marketing

- **Product Manager**

- ”...ultimately responsible for product’s success or failure”*

- ”...discover a product that is useful, usable and feasible”*

- **Product Marketing**

- ” messaging & positioning, pricing, promotions, customer acquisition, influencer marketing, sales & channel education”*

- *...Must have*

- ”knowledge of the user, the technology, the domain and the market”*

OK, but... Observations from Gartner & Cisco

- **That's a lot of Knowledge!**
- **Products don't exist in a vacuum**
- **Product Managers don't run LOBs...**
- **...but they do have a key contribution beyond their direct responsibilities**
- **"Together we are stronger than we can ever be apart"**

Company Vision



Company Vision

Changing the Way We Work, Live, Play, and LearnSM

Company Mission

Shape the future of the Internet by creating unprecedented value and opportunity for our customers, employees, investors, and ecosystem partners.

Customer Focus—Market Segments



VISION

- **Network Changes Way We Work / Live / Play / Learn**
- **Network Becomes the Platform... IIN**
- **All Forms Communication / IT Into Network**
- **Enabling New... Business Models Productivity Entertainment**

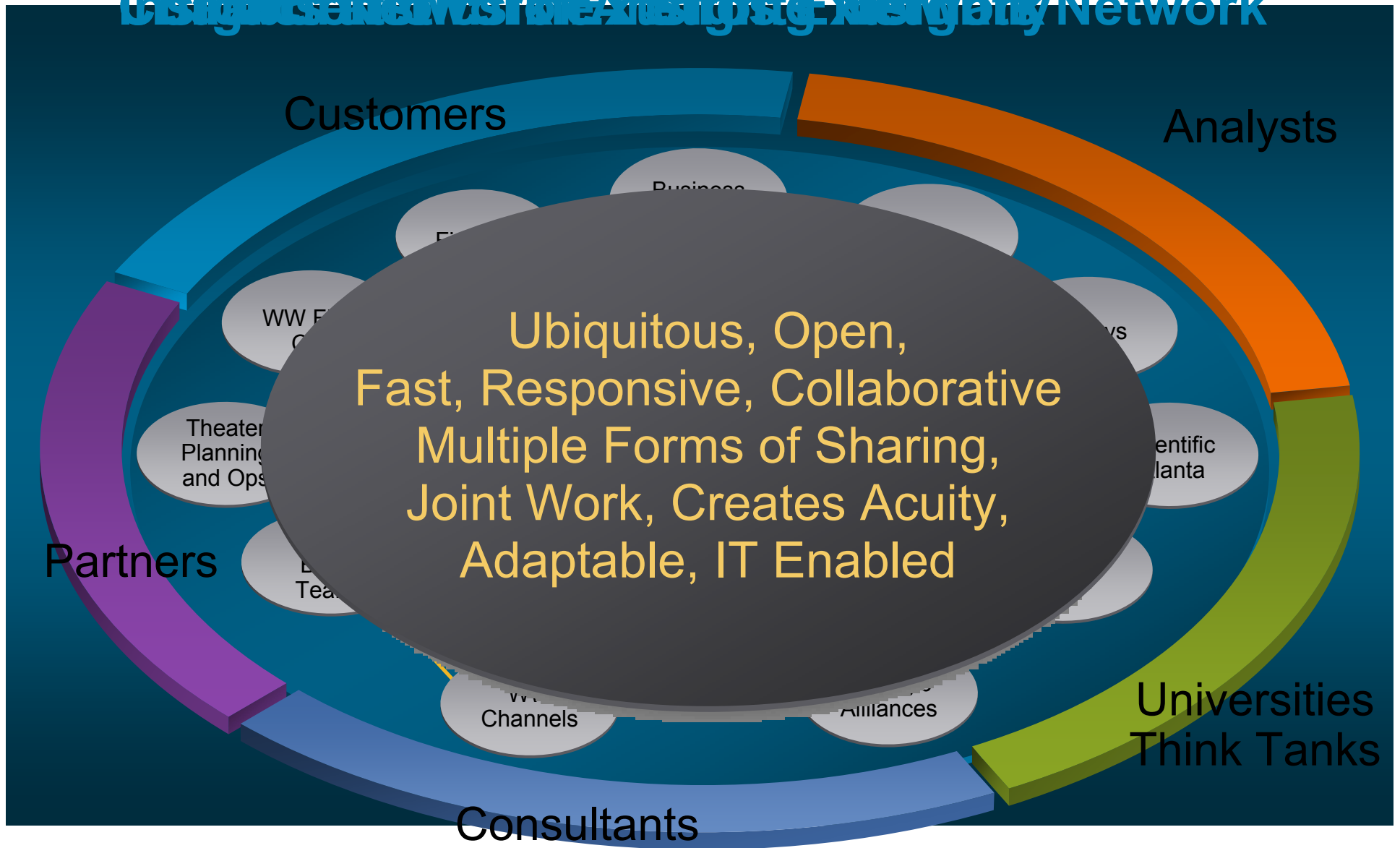
STRATEGY

- **Market Transitions... Customer Driven**
- **Innovation... Build / Buy / Partner Collaborate**
- **Technology and Business Architecture**
- **Cross Functional Teamwork / Prioritization**

EXECUTION

- **#1 Product Leadership**
- **Lead Layers 1-7 Convergence...**
- **Leader In All Customer Segments**
- **Quad Play Everywhere... UC**
- **Leader in Collaboration / Web 2.0**

Disruptive Networks: The FAO against the Merit-based Network



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Strategic Marketing: Vision and Mission



Vision:

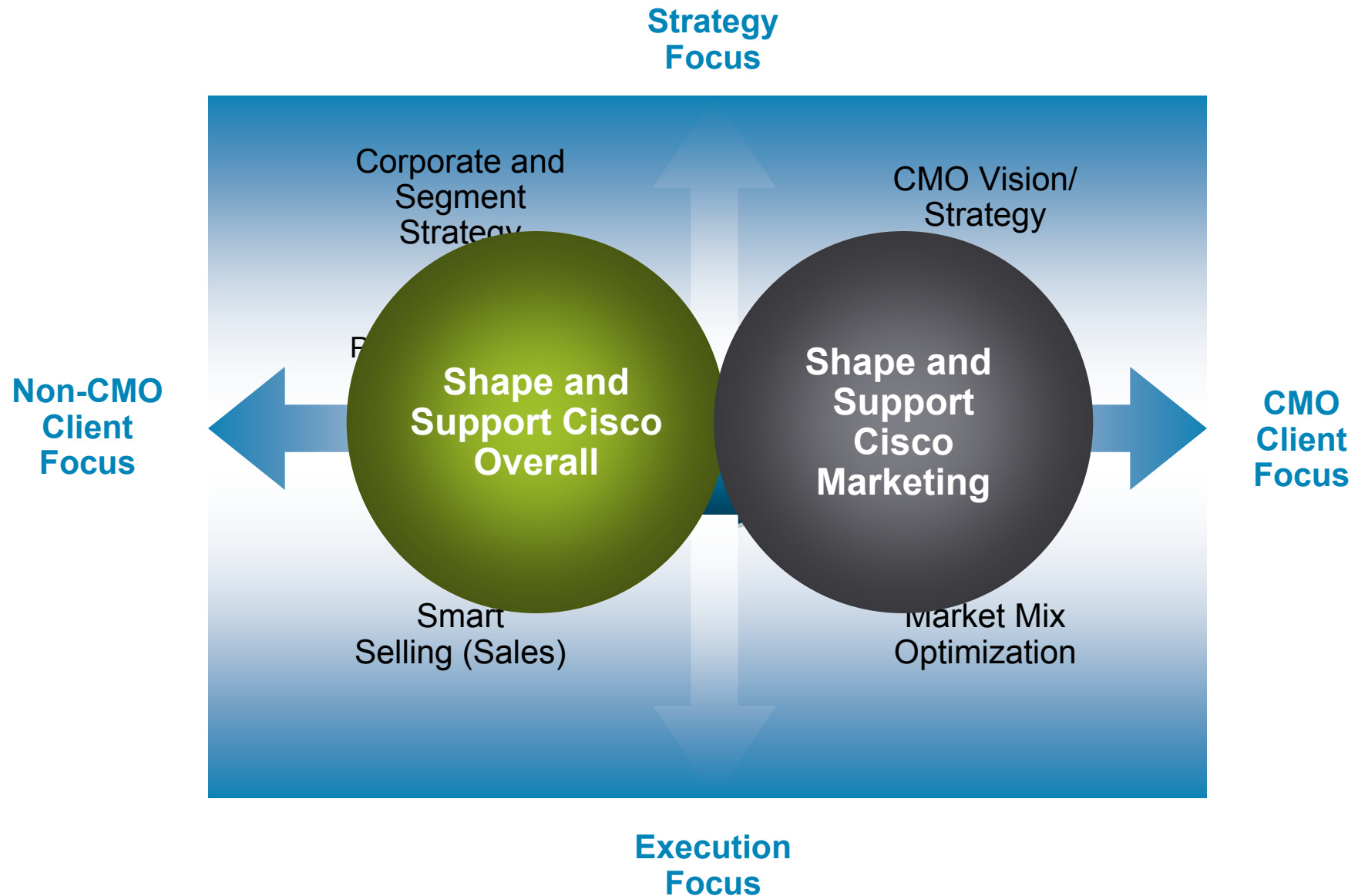
Changing the Way We Plan,
Target, Compete and Execute



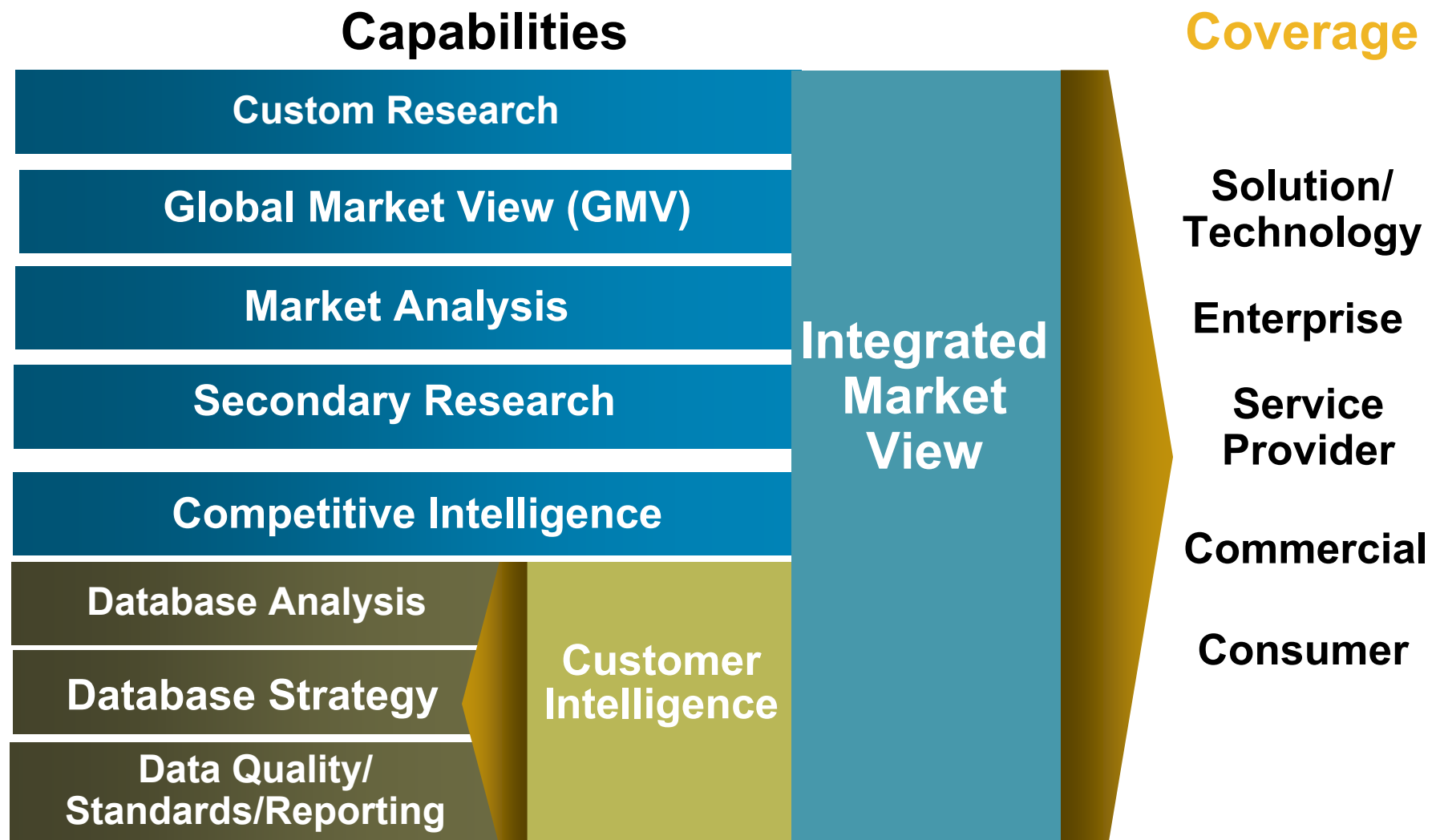
Mission:

Deliver Unique **Insight** About
Markets, Customers and
Competitors Which Drives
Positive **Impact** to Cisco, Its
Customers and Partners

Positioning and Focus



Strategic Marketing Capabilities



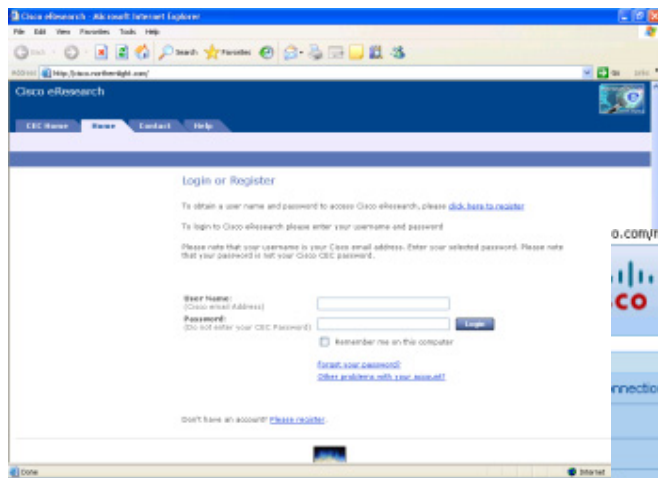
Tools & Resources



Competitive Portal



Wikis



Research Portal

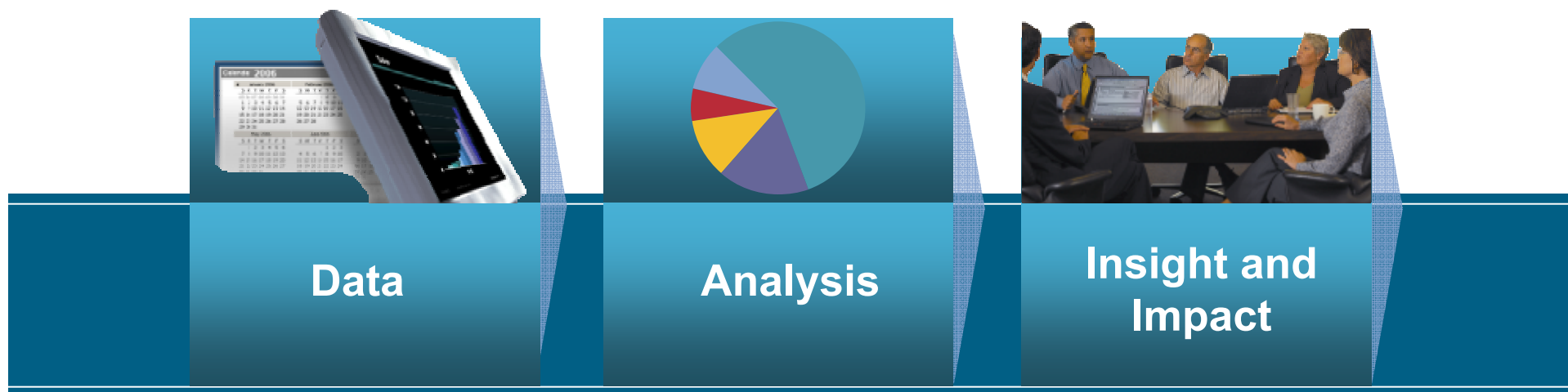


Global Market View (GMV)



Competitive Dashboard

Strategic Marketing Evolution



Agenda

Who?

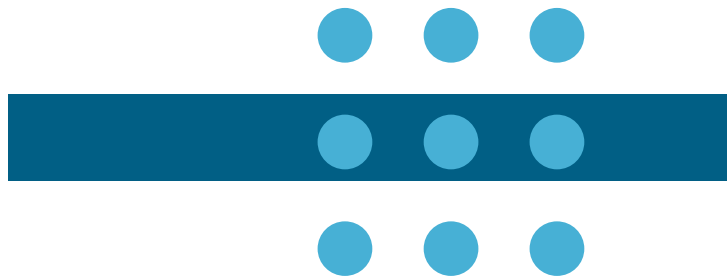
Strategic Marketing @ Cisco

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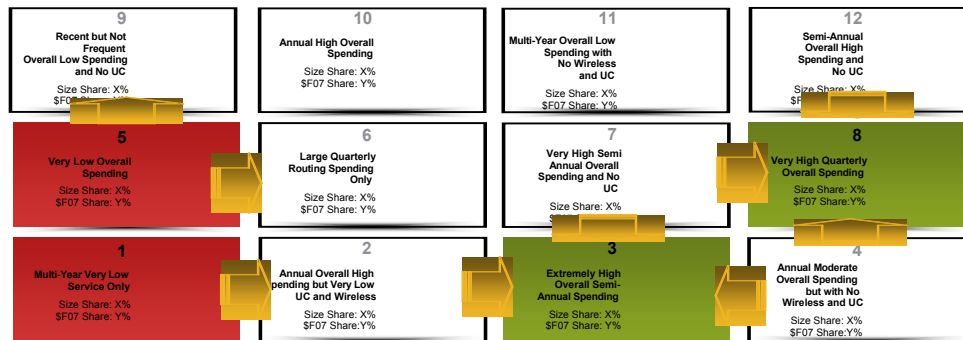


Customer Intelligence

Role of Customer/Business Intelligence

- Delivers incremental value derived from data-driven models applied to marketing programs
- Provides insights and directions for market planning and execution
- Ensures customer data quality for marketing execution and reporting

Applied cluster analyses

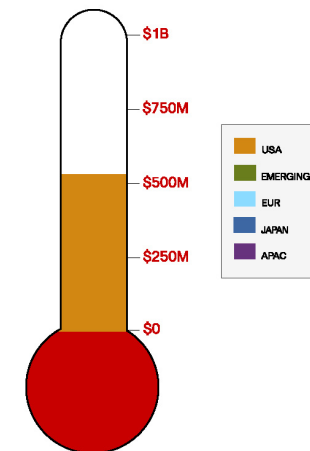


Data Quality Management



Revenue generating models

The Heat is On! \$1B Buddies



FY08 Business Intelligence (BI) goal is reached by using global, BI methods



Wireless Propensity Models

Challenge



- Identify customers with high propensity to up sell or cross sell wireless technology in the next two quarters.

Action

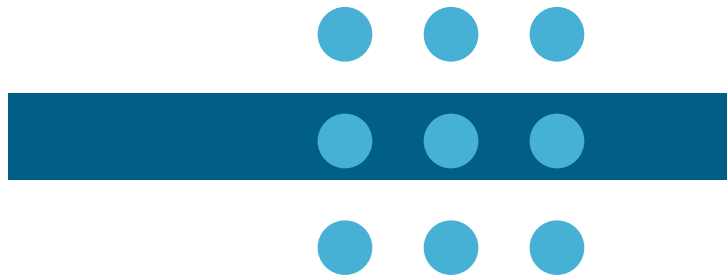


- Developed Propensity to Up Sell or Cross Sell Wireless statistical model.
- Deployed probabilities/scores.

Results



- Purchase Rate Increased 2.4 Times!
- Deal Size Increased 3.4 Times!
- Generated \$XXM in Additional Bookings!



Custom Research

SMO Custom Market Research Capabilities

▪ Brand Research

- Identity Research (Naming, Audio, Logo)
- Positioning
- Brand Health, Brand Image, Brand Stretch
- Brand Choice Drivers

▪ Communications Research

- Messaging
- Advertising (All media)

▪ Ideation

- Creative/Product Concept Exploration

▪ Channel Research

- Reseller Segmentation
- Channel market landscape

▪ Product Research

- Concept Testing
- Usage
- Product Positioning
- Price/Feature Optimization
- Price Elasticity
- Industrial Design

▪ Targeting

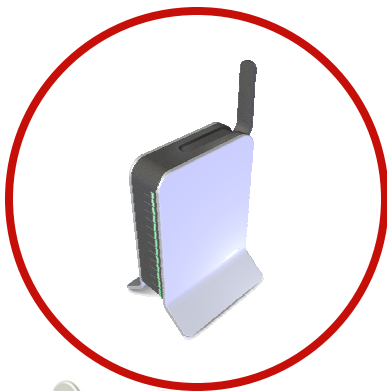
- Market Segmentation
- Psychographics
- Buying Behavior

▪ Other Capabilities

- ZMET (metaphor elicitation)
- Ethnography

Which is the preferred consumer router design? (Europe)

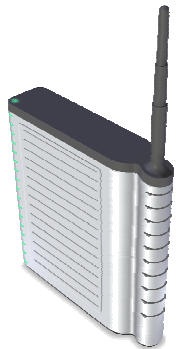
Preferred



"tidy"
"sleek"
"futuristic"



"fun"
"clever"
"cheap-looking"



"retro"
"compact"
"might tip over"

Neutral

"solid"
"powerful"
"old-fashioned"



"iPod-like"
"modern"
"why does it have a handle?"



"sophisticated"
"alarm clock"
"too much like old modems"



Negative

"chunky"
"kitchen scales"
"80's hi-fi"



"toilet brush"
"bulky"
"ugly"

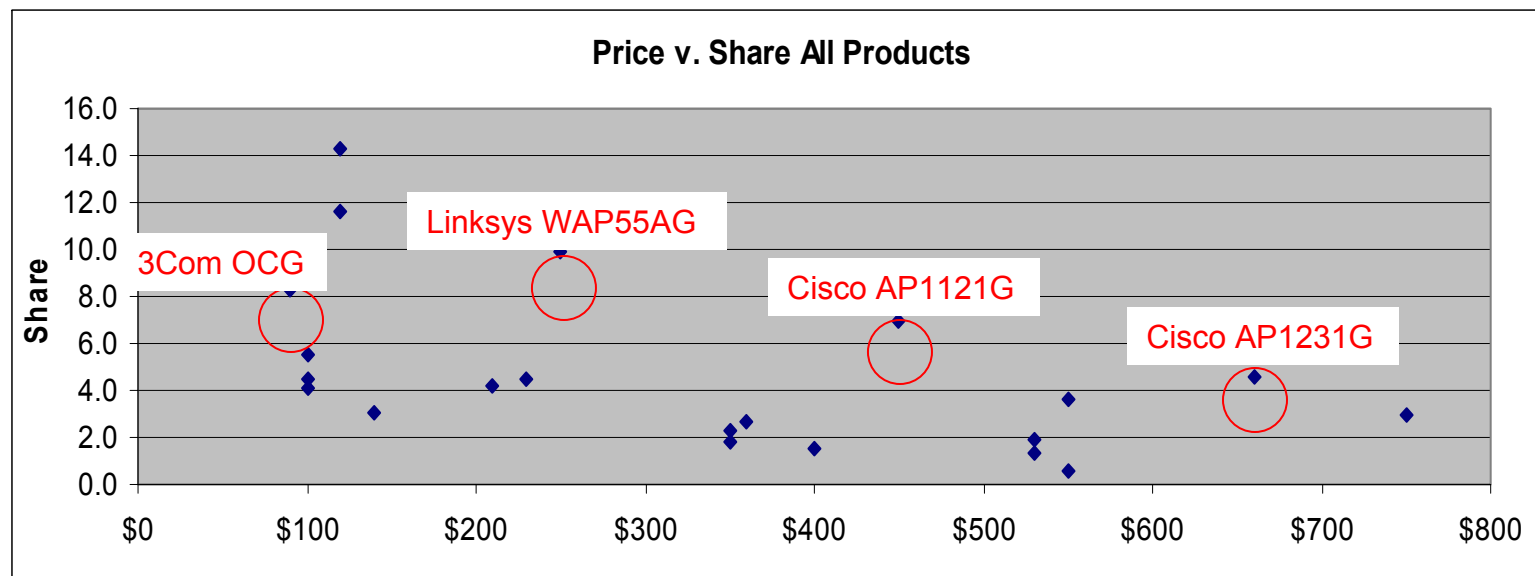
Price Elasticity Findings

- The price-demand relationship for products in the AP space is not linear.

Interactions with other products and price points.

Probable “uncertainty” among many people about the relationship between some key features and price.

Typical plot (below) shows that when products are priced at points that are not close to competitive price points or are otherwise differentiated (e.g., lowest price), share tends to be higher.



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Market & Competitive Capabilities

Capabilities

War Room

Market Analysis

Competitive Analysis

Coverage

Market Assessment

Market Sizing

Competitive Deal Support

Defining Addressable Markets

Competitor Review

Market Pricing Analysis

Competitor Messaging Analysis

Competitive Solution Reviews

Competitor Technology Reviews

Competitor Planning

Market / Competitor Threat Assessment

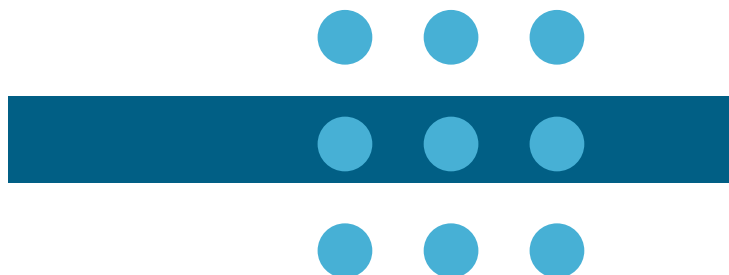
Competitive Market Modelling

Quarterly Market Review

Annual Market Review

Competitive / Market Training

Who, What , How & Playbooks

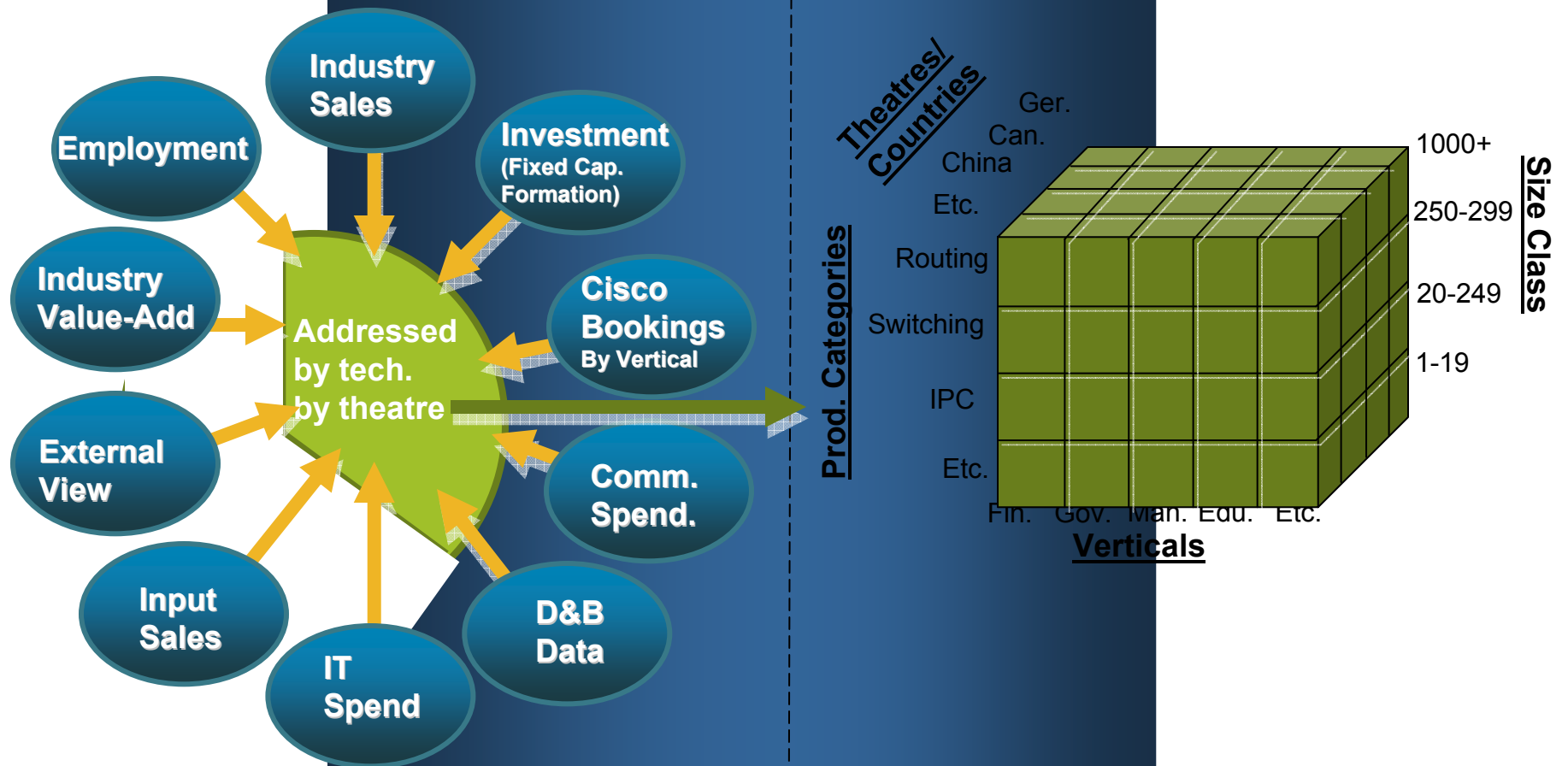


Market Intelligence

Global Market View model

Addressed by Technology by Theatre (Phase 1)
+
Inputs by Vertical by Company Size:

Addressed by Technology by Country
by Vertical by Size Segment (Phase 2):



Global market view

Top level information



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Customer Intelligence Center

Global Market View Analytics

Global Market View Analytics
Welcome, Michael!
Dashboards -- My Account - Support/Feedback - CIC Glossary - Log Out

Global Market Overview
Total Market Forecast
Total Addressable Market
Solution Market Forecast
Ext. Analyst - Market Overview

[CLEAR MY SELECTIONS](#)

Select filter(s) and click "GO"

Calendar Year
Zwischen und

GMV Theater
European Markets

GMV Country
Germany, Fran

Main Technology
Unified Commu

Main Verticals

Employee Size Class

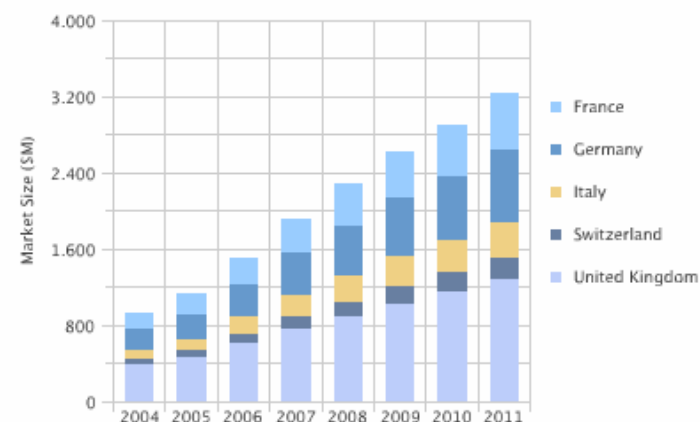
[Show me BY FISCAL YEAR...](#)

TOTAL ADDRESSABLE MARKET (CALENDAR YEAR)

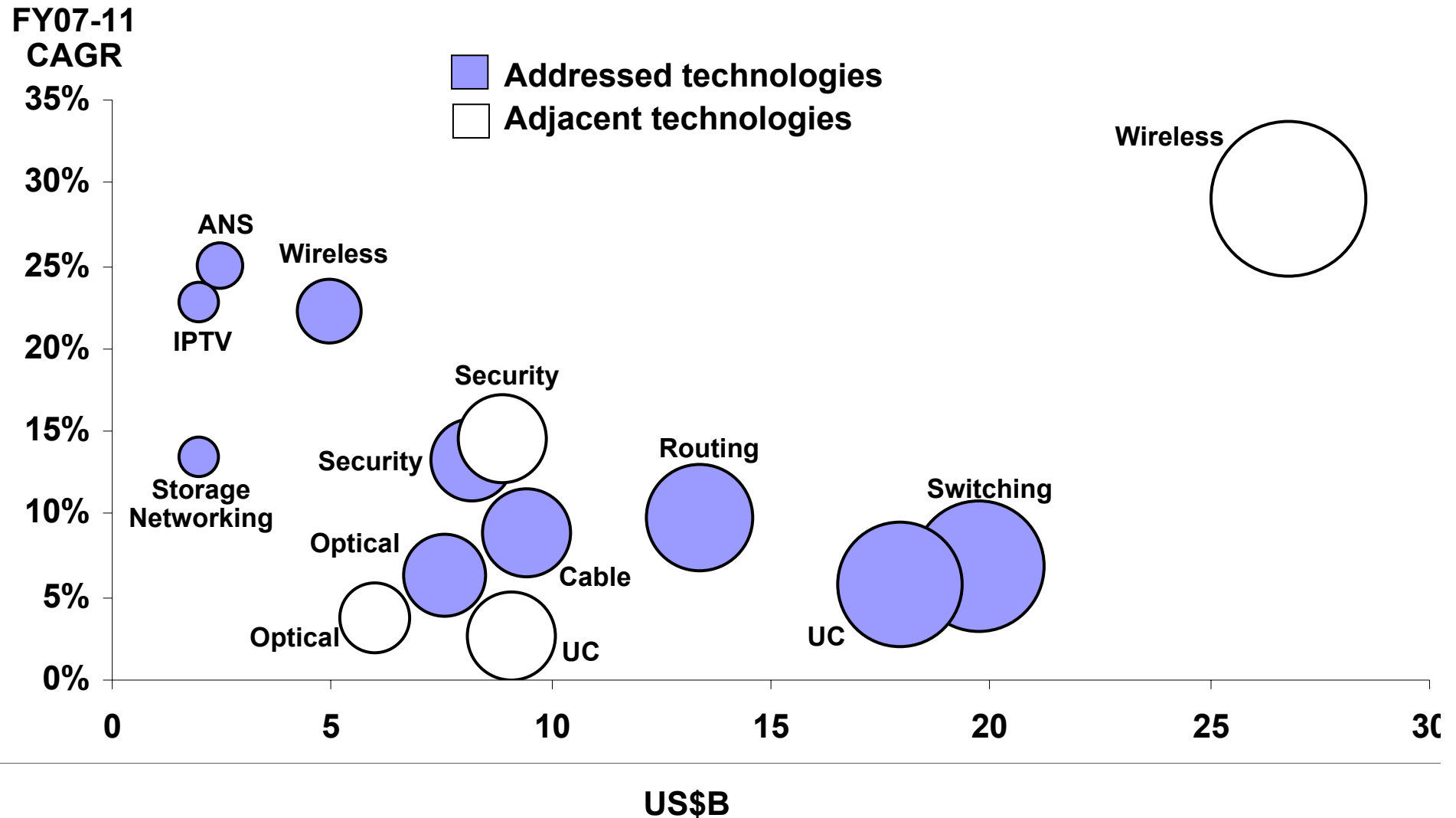
Excluded Technologies:

GMV Country [Los](#)

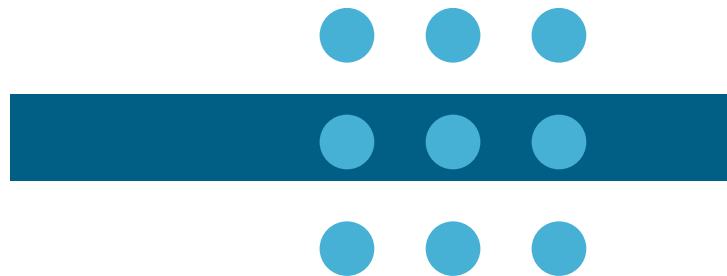
	Market Size (\$M) - Calendar Year							
GMV Country	2004	2005	2006	2007	2008	2009	2010	2011
France	178,540	214,454	285,976	365,370	433,930	492,588	538,354	599,419
Germany	215,570	256,876	344,364	440,485	532,491	615,082	678,188	755,114
Italy	97,866	124,288	171,567	223,281	268,195	308,303	340,585	381,594
Switzerland	61,113	71,778	98,491	129,044	159,230	183,156	196,993	219,337
United Kingdom	382,172	463,872	615,797	766,752	888,994	1.031,899	1.153,048	1.283,839
Gesamtsumme	935,261	1.131,269	1.516,194	1.924,932	2.282,840	2.631,028	2.907,168	3.239,303



Global Market View (GMV) Forecasts



Source: Cisco Global Market View, October 2007



Competitive Intelligence

Competitive Leadership Portal

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F5 Networks

Force10

Fortinet

Foundry

Huawei

IBM/ISS

Juniper

Microsoft

Mitel

Nortel

ProCurve

Riverbed

ShoreTel

Siemens

Symantec

Symbol

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Regions

Linksys Competitors

Content Administration

Competitive Headlines

Aug-20 [Microsoft and Cisco Discuss Technology Vision and Competitive Partnership \(DOC - 41KB\)](#)

Aug-15 [Competitive Wiki Launch: Riverbed and Juniper](#)

Aug-02 [Catalyst Fixed Switching Challenge for Channel Partners is LIVE](#)

Jul-12 [Google to acquire messaging security provider Postini for \\$625M cash](#)

Jul-05 [Cisco and Ericsson Alliance Retirement \(read details in a Q&A doc\)](#)

>> [More/Archive](#) | [Submit News](#)

Featured Competitive Sites



Or browse for specific Competitors:

[ALL](#) - [0-9](#) - [A](#) - [B](#) - [C](#) - [D](#) - [E](#) - [F](#) - [G](#) - [H](#) - [I](#) - [J](#) - [K](#) - [L](#) - [M](#) - [N](#) - [O](#) - [P](#) - [Q](#) - [R](#) - [S](#) - [T](#) - [U](#) - [V](#) - [W](#) - [X](#) - [Y](#) - [Z](#)

If you have content or comments on any competitors, [we want to hear from you](#).

Competitive Doc Tracker

Search the Doc Tracker database for the all content on this site. View the [search tips](#).

Top Competitors	Technology	Segment
All Competitors	All Technologies	All Segments
3Com	Application Networking	SP
Alcatel	Collaboration Software	Enterprise

Item Types	Keywords	Search
All Item Types	☒ All Words	Search Records
Acquisition Response	☐ Exact Phrase	
Architecture Vision		

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View the latest Cisco TV
Microsoft-UC
Competitive Deep Dive

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Understand the landscape...

Competitive Dashboard

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WINS
DATABASE
RELOADED

Over
3800 Wins
already entered

Presentation_ID

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Competitive Leadership

Alcatel - Lucent Competitive

Support/Feedback Page Tools

Navigation

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- Alcatel - Lucent**
 - Company Overview
 - Selling Tactics
 - Products, Solutions, and Services
 - Training Materials

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Popular Items

- Competitive Team Contacts
- Alcatel Web Site
- Wins Database
- Voicemail Recaps

Alcatel Drop Box

User ID:

Send us competitive intelligence, product roadmaps, competitor issues, rumors.

Reset Submit

Competitive RSS Feeds

You can subscribe to thousands of RSS Feeds to keep up to date on new Competitive & Marketing resources:

- Standard RSS Feeds
- Create Custom RSS Feeds

Alcatel Headlines

- Aug-15 [Competitive Wiki Launch: Riverbed and Juniper](#)
- Aug-15 [Cisco Unified Communications Q1 and FY08 Outlook](#)
- Jul-10 [Empowered Branch QuickWins site goes live](#)
- Jun-22 [Light Reading EANTC IPTV/Triple Play Test Results \(PPT - 4MB\)](#)
- Jun-08 [VoD: FoCom Competitive Broadcast \(VOD\) \[PDF\]](#)

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Company Overview

Who they are: strategy business overview, market messaging, partners and channels

Selling Tactics

Setting the agenda against this competitor; win/loss best practices; how they sell against Cisco and how to counter

Products, Solutions, & Services

What they sell: technology, solutions, products and services overviews; product testing and analysis

Training Materials

Training Events; Competitive IPTV, VODs, VMs, Tech Talks and other training materials

Competitive Doc Tracker

Search the Doc Tracker database for the all content on this site. View the [search tips](#).

Competitive Doc Tracker		
Top Competitors	Technology	Segment
All Competitors 3Com Alcatel	All Technologies Application Networking Collaboration Software	All Segments SP Enterprise
Item Types	Keywords	Search
All Item Types Acquisition Response Architecture Vision	☒ All Words ☐ Exact Phrase	 Search Records

Newest Content

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- [Alcatel SP SWOT](#) (PPT - 664)

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- Competitive Wiki
- Submit Web Content
- Competitive Dashboard
- Competitive RSS Program
- Voicemail Subscription Tool
- Competitive Aliases/Forums
- Doc Tracker Search

Links

- War Room (GOT)
- Solutions Marketing
- Market Intelligence
- CA Competitive Intelligence
- Investor Relations - Alcatel

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Over **3800 Wins** already entered

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LAN Switching Events

Popular Items

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[Switching Competitive Guide \(PDF\)](#)

LAN Switching Drop Box

User ID:

Send us competitive intelligence, product roadmaps, competitor issues, rumors.

Competitive RSS Feeds

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- [Create Custom RSS Feeds](#)

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Technologies

LAN Switching Competitive

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Support / Feedback |

LAN Switching Market: Competitive Landscape

This is how CLT recently ranked the relative threat of key competitors in this technology segment.

Why?

Connect to the [Competitive Dashboard Tool](#) to find out.

Key Competitors

Search for competitor specific LAN Switching documents:

Price Sensitive LAN Switching competitors:

Feature Oriented LAN Switching competitors:

Other LAN Switching competitors:

LAN Switching Newest Content

Subscribe to the RSS Feed for this content. [Learn more...](#)

- [Financial Summary: Nortel Q2 2007](#) (DOC - 130KB)
Internal. Summarizes Q2 financials including financial statements; provides geographic and product revenue breakdown; includes analyst comments skeptical of Nortel
 2007-AUG-03, [Jim Dudley](#)
- [Financial Summary: Extreme Q4 / Fiscal 2007 Financial Recap](#) (DOC - 141KB)
Internal. Recaps Extreme's Aug 1, 2007 financial summary; provides revenue split by form factor, geography, and channel; includes key trends and issues
 2007-AUG-03, [Jim Dudley](#)
- [Financial Summary: Foundry @ 2007](#) (DOC - 130KB)
Internal. Summarizes Foundry Q2 Financials announced July 26, 2007; provides revenue by theater, form factor, product type, plus comments by Foundry execs
 2007-JUL-31, [Jim Dudley](#)
- [At-A-Glance: How-to-Sell Against ADTRAN](#) (DOC - 130KB)

Related Items

Tools

- [Competitive Wiki](#)
- [Submit Web Content](#)
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Links

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Understand the landscape...

Competitive Dashboard

[Go Now](#)

FORWARD COMPETITIVE INFORMATION

Online Via Drop Box

Available on all Competitive Sites

Sign up for Competitive Voicemail Updates

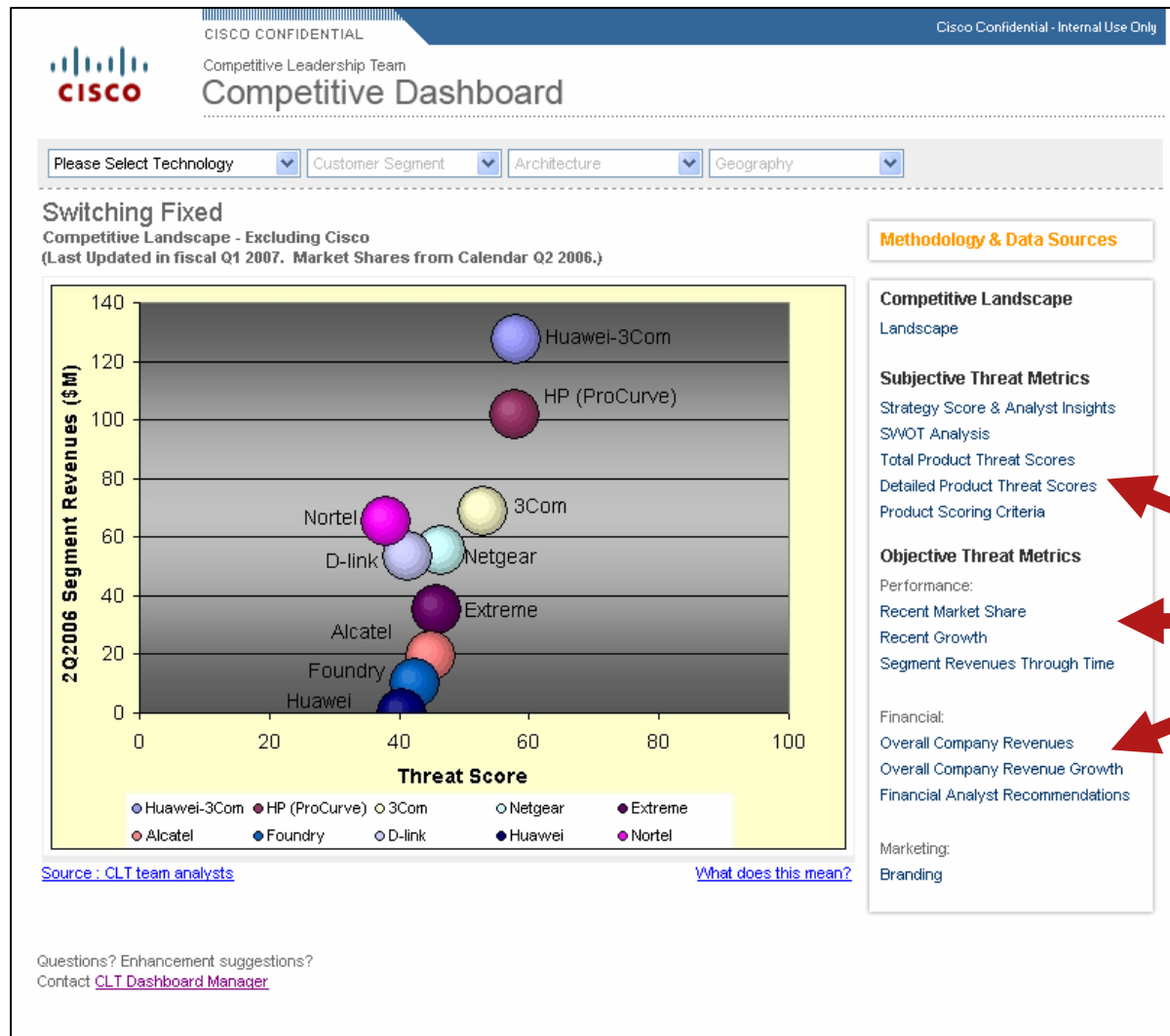
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Competitive Dashboard Tool



Click for
technology
market
competitive
landscape,
facts and
expert opinions

Find Information by Architecture

Competitive Dashboard Tool

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Competitive Leadership Team
Competitive Dashboard

Architecture Geography

Datacenter Architecture
green=strength, yellow=average offering, red=weakness, black=no product

Choose a single competitor, or build a view of a "best of breed" solution by selecting multiple competitors. Read comments and scores by clicking on "traffic light" score boxes. If certain criteria are irrelevant to you, you can exclude them from the model and score calculations by clicking on the cells (grayed out cells=excluded cells).

Data Center Architecture

DC MANAGEMENT

- Application provisioning and virtualization
- Application Performance Monitoring
- Traffic Monitoring & Analysis

APPLICATION SERVICES

- DCAS (Data Center Application Services)**
 - Application control
 - Application load balancing
 - Application acceleration
 - XML and Web services (AON)
 - DCAS consolidation/integration
- WAAS (Wide Area Application Services)**
 - Application services
 - File services
 - Digital Media Delivery
 - WAAS consolidation/integration
- DC Security**
 - Role-based Access Control
 - Intrusion Prevention
 - Virtual Firewall
 - Application DDoS Guard
 - Context Segmentation
 - Physical Security

NETWORK SYSTEMS LAY

- Virtualization
- Industry Partners
- Horizontal server
- RPR
- Multiprotocol
- Enh. Driver Stack
- GE aggregation
- L3 MPLS VPN
- App intelligence
- 10GE switching
- L3 IPsec VPN
- Blade Switching
 - Fibre Channel
 - Infiniband
 - GE
- VPLS
- EoMPLS
- L2/L3 QoS

NETWORK SYSTEMS LAY

- Power
- Rack Space Optimization
- Cabling
- Storage Networking
- High-Performance Computing
- Ethernet Networking
- WAN/MAN
- Blade Switching

Company

Company	Link
☐ Brocade-McDATA	Link
☐ Cisco	Link
☐ Citrix	Link
☒ F5	Link
☐ Force10	Link
☐ Foundry Networks	Link
☐ Juniper	Link
☐ Nortel	Link
☐ Packeteer	Link
☐ Radware	Link
☐ Riverbed	Link
☐ Silver Peak	Link

Overall Solution Strength **4.14**

* Score out of 10

Source: SMO & Europe ACT Tool

[What does this mean?](#)

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Score and Comments on architecture components, ability to compare to "best of breed" solution

5
Solution: F5 WANJet

Comment: F5 started delivering WAN optimization Controllers (WOC) with acquisition of Swan Labs in 2005. WANJet now has CIFS acceleration features. CIFS capability significantly accelerates Windows file sharing, including remote access (across a WAN) of common Microsoft applications such as Word, Excel, and PowerPoint. WANJet integrates key performance technologies, including Transparent Data Reduction, adaptive TCP optimization, site-to-site encryption, and quality of service (QoS) that are applied to application streams. It scales up to 622 Mbps of throughput and provides up to 10,000 concurrent optimized connections on a single appliance. WANJet helps organizations to optimize data replication across data sites, bringing data consistency much closer to real-time in almost all situations. Today - the WANJet product runs its own proprietary SWAN OS - but is being ported over to F5 TMOS OS.

Enabling a Web 2.0 approach

The screenshot displays the Cisco Competitive Leadership website. The top navigation bar includes links for Log In, Cisco Websites, Navigation Tools, Emergencies, and a search bar. The main content area is divided into several sections:

- Competitive Headlines:** A list of recent news items, including "Microsoft and Cisco Discuss Technology Vision and Competitive Partnership (DOC - 41KB)" and "Competitive Wiki Launch: Riverbed and Juniper".
- Featured Competitive Sites:** A banner featuring logos for 3COM, Alcatel-Lucent, AVAYA, extreme, FOUNDRY NETWORKS, ProCurve Networking, HUAWEI, Juniper NETWORKS, and NORTEL NETWORKS.
- Competitive Doc Tracker:** A section for searching the database, with filters for Top Competitors, Technology, Segment, Item Types, and Keywords.
- Competitive RSS Feeds:** A section for subscribing to RSS feeds, with links for Standard RSS Feeds and Create Custom RSS Feeds.
- Secure Items:** A section for secure content, with links for Executive Competitive and Solutions Marketing Secure Site.

On the right side, there is a sidebar with the following sections:

- Related Items:** A section containing a list of tools, including Competitive Wiki, Submit Web Content, Competitive Dashboard, Competitive RSS Program, Voicemail Subscription Tool, Competitive Aliases/Forums, and Doc Tracker Search. A red arrow points to the "Competitive Wiki" link.
- Links:** A section containing links for Solutions Marketing, Investor Relations, Market Intelligence, Current Analysis, CA Competitive Intelligence, European Competitive, Partner Competitive Portal, and Japan.

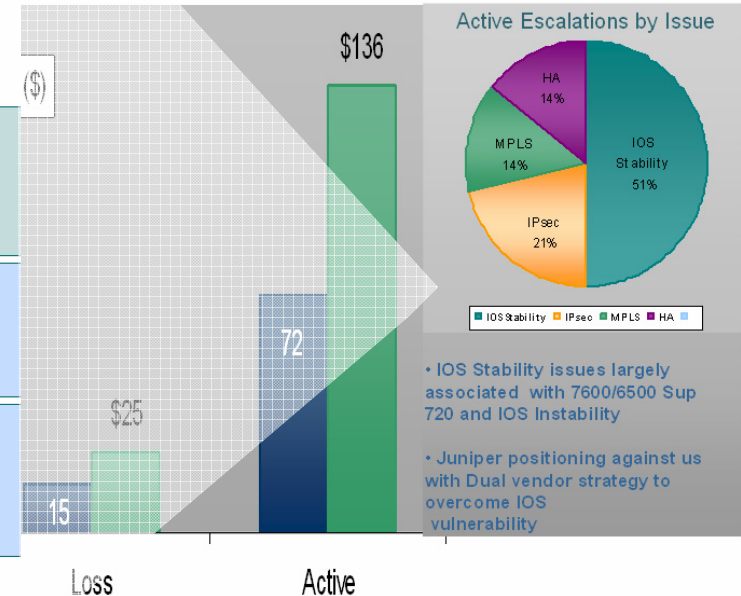
At the bottom right, there is a "One Stop Shopping" section and a "Forward Competitive Information Online Via Drop Box" section.

War Room Analysis of Front-Line Competitive Pressures

Top War Room IOS Issues by Product

n/Loss/Active Totals and Deal Values

Juniper®		CISCO SYSTEMS
T- M Series M40e, ERX14X0	IOS Stability MPLS HA, Carrier Class, Modularity, Reliability IPv6, VPLS, MPLS TE, Second Vendor ISSU, AwareNat and mVPN External; NFS/SSO	12000 7600 6500
M10i M7i	IOS Stability, MPLS L3 Carrier Class EQ/Performance Modularity/Parity/Stability AToM Any over Any	7300 7200
NS-5X00 NS-5GT SA-1000 J-Series	Single Management for IOS/Service Module OS IOS Stability Modularity, Encrypted Mcast over IPsec	FWSM/7600 VPN/SM/7600 7200 ISR



Source of Competitive and Market Insight

Annual Competitive Market Intelligence Report

Forecasting per technology with implications, drivers, competitive inflection points

- Landscape Trends Drivers 07-09
- 5 Force Analysis / Addressable Market
- Channel & Network Size Aug 07 / Network Size 09
- Commoditization
- Tech Adoption Life Cycle 07 / Tech Adoption Life Cycle 09
- Where will the threats Come From
- Top 3 Competitors Today / Tomorrow

q -CMIR
Master Spreadsheet

- Quarterly Challenges and Implications
- Dell'Oro Solution Numbers
- CQ Rev, Units And ASP Trends
- CQ Theatre Performance
- Competitive Landscape
- Recent 3rd Party Analyst Research (If applicable)

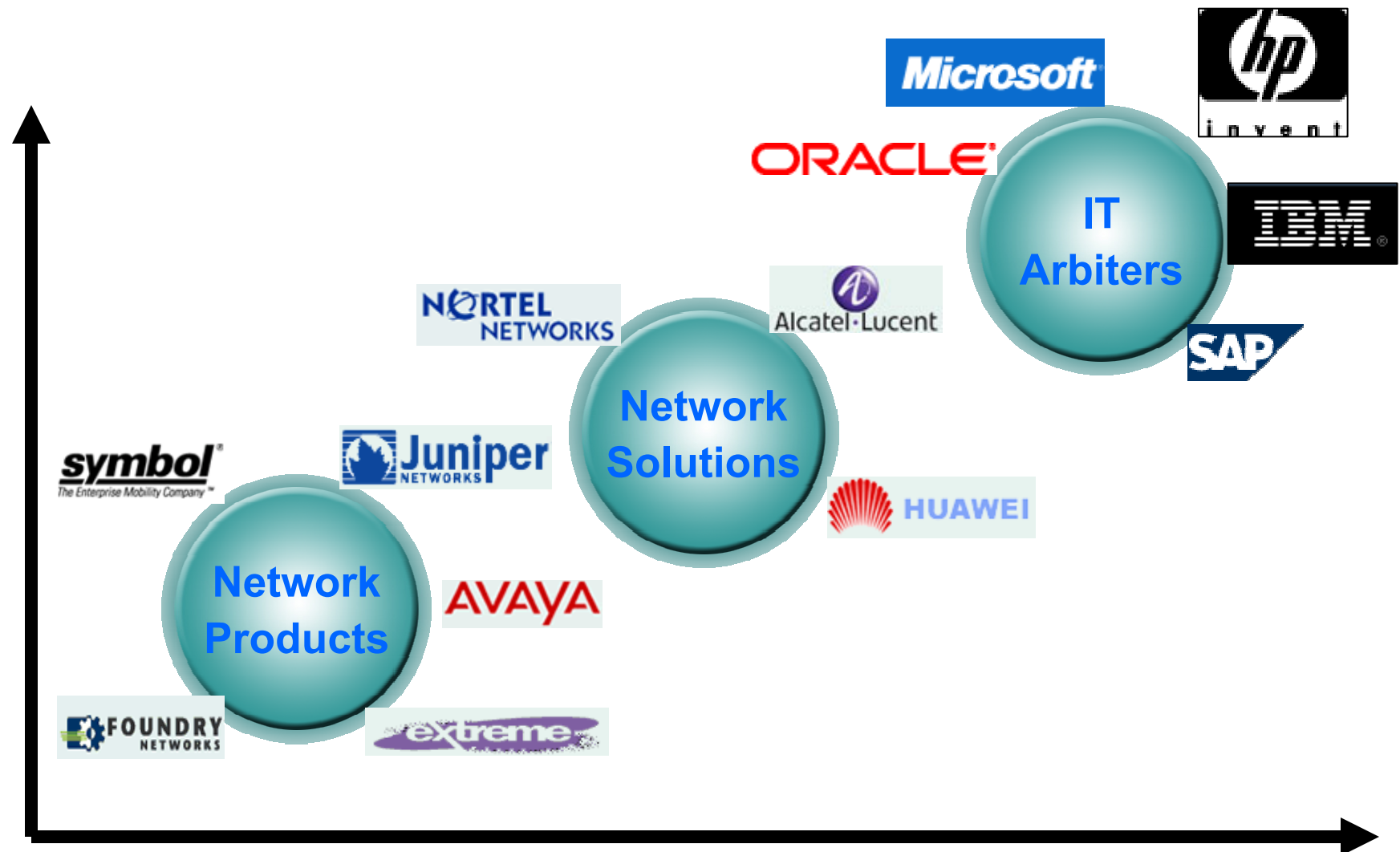
q -CMIR
Master Spreadsheet

q -CMIR
Master Spreadsheet

q -CMIR
Master Spreadsheet

<http://www.in.cisco.com/marketing/mi/mktshare/>

Competitive Categories Reflect Evolving Market Demands and Cisco Response



Agenda

Who?

Strategic Marketing @ Cisco

Customer & Custom Research

Market and Competitive

A Bigger Picture



SMO Capabilities



Valuable Insights

Consulting
Experience

Market/Segment
Expertise

Predictive
Data Mining

Custom
Research

Technology/
Solutions
Expertise

Competitive
Analysis

Opportunity
Analysis and
Forecasting

Syndicated and
Proprietary
Market Data

SMO Capabilities

Best options in the
s/w business?



Valuable Insights

**Consulting
Experience**

**Market/Segment
Expertise**

**Predictive
Data Mining**

**Custom
Research**

**Technology/
Solutions
Expertise**

**Competitive
Analysis**

**Opportunity
Analysis and
Forecasting**

**Syndicated and
Proprietary
Market Data**

SMO Capabilities

What are the under-served opportunities we can address to increase revenues?

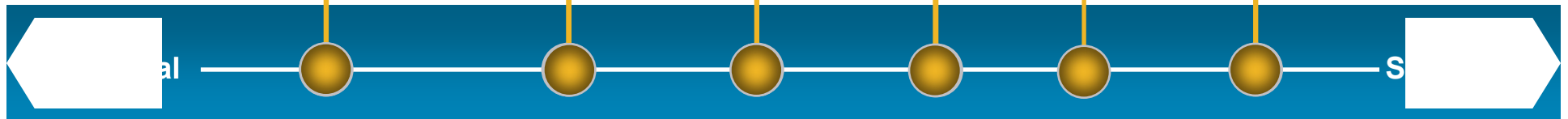
How Do We Compete Against Juniper In North America?

Customers I Should Prioritize?

Features/ Price For Optimization?

Accurately Forecast for China?

Best Options in the S/W Business?



Valuable Insights

Consulting Experience

Market Segment Expertise

Predictive Data Mining

Custom Research

Technology Solutions Expertise

Competitive Analysis

Opportunity Analysis and Forecasting

Syndicated and Proprietary Market Data

Looking at the Big Picture helps to identify what sort of animal you are dealing with...

