

FOR: CIOs



Office 2013: A Breakthrough In Productivity

by Rob Koplowitz, John R. Rymer, Ted Schadler, Art Schoeller, Philipp Karcher, Frank E. Gillett, Christopher Voce, and Leslie Owens
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KEY TAKEAWAYS

Office 2013 Offers Improved User Experience Across All Products

Office 2013 is a major release, and the investment pays off across all of the products in the Office family. One critical improvement is a simpler and more powerful user experience.

Integration Across The Family Of Products Drives Value

The sum of the parts is greater than the whole. Microsoft designed each product to leverage other products in the family, and integration is provided out of the box.

Integration Can Also Drive Lock-In

The deep integration can be powerful, but it also can lock you into a broad family of products. Ultimately, it impedes the ability to bring in best-of-breed products and could over time lock you into a Microsoft-dominated stack.

Office 2013: A Breakthrough In Productivity

Highly Integrated With A Risk Of Lock-In

by [Rob Koplowitz](#), [John R. Rymer](#), [Ted Schadler](#), [Art Schoeller](#), [Philipp Karcher](#), [Frank E. Gillett](#), [Christopher Voce](#), and [Leslie Owens](#)

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WHY READ THIS REPORT

Microsoft looks to strike three very familiar chords with the release of Office 2013: mobile, social, and cloud. Each has become table stakes for enterprise software, and in order for Microsoft to maintain its dominant position in knowledge worker technology in the enterprise. It gets cloud right within the context of a hybrid delivery model, it has the foundation for social with Yammer, but it got mobile wrong with a “Windows Mobile first” strategy. Another part of Microsoft’s strategy is anything but new: bundle, integrate, lock in. Exchange, SharePoint, Lync, and core Office applications all offer many significant enhancements, and the integration between Office properties is becoming deeper, more meaningful, and intended to drive deeper investment in a suite of Microsoft offerings.

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Notes & Resources

Forrester participated in a three-day analysis session with Microsoft to explore Office 2013 in depth. Forrester also leveraged existing research and client feedback.

Related Research Documents

[The State Of Workforce Technology Adoption: Global Benchmark 2012](#)
April 12, 2012

[Office 365: Version Two Of SharePoint In The Cloud](#)
February 17, 2012

[Unified Communications Purchase Plans 2012](#)
January 11, 2012

[SharePoint Adoption: Content And Collaboration Is Just The Start](#)
September 30, 2011



A CONSCIOUSLY PLANNED, HIGHLY INTEGRATED DELIVERY APPROACH

Microsoft has made a subtle but very important shift with the 2013 release of Office 2013. For the first time, it is releasing multiple products in a coordinated fashion. This has two major implications. First, the ability to access key functionality across product boundaries becomes easier, which magnifies the value of each individual product. Second, the various product teams now depend more on one another, and the failure of one team to deliver could have a ripple effect across multiple product delivery cycles in the future.

Office Offers Cool New Features For Individuals . . .

Any analysis of Office needs to begin with the part of the brand that holds the birthright to the name “Office”: Microsoft’s market-dominant productivity applications.

- **A new user interface (UI).** The new user interface is slick and consistent across all of the native Office applications but is different in Windows Store applications like OneNote and Lync.
- **Faster loading.** The ability to immediately launch and run native Office from any computer — even one that doesn’t already have Office loaded — in seconds is impressive and useful. The products’ streaming-app capabilities make this magic possible.
- **A new focus on the individual.** Things like improved usability and a simplified user experience feel like a welcome return to Microsoft’s roots as the great democratizer of technology it once was. As you think about rolling out Office 2013, tap into the personal benefits that every employee can get from Microsoft’s renewed focus on the individual.
- **A new clean look.** The new cleaned-up UI makes Office more productive, less intimidating, and more fun.
- **Better integration with PowerPoint and Excel.** Improvements include PowerView in Excel, threaded comments, better charts, more intuitive pivot table creation, and overall better PowerPoint/Excel integration.
- **Syncing across devices.** The ability to utilize SkyDrive Pro as a cloud storage option opens up the opportunity to provide Dropbox-like functionality while giving IT control and security.

... But It Can Only Run On Windows 7 And Windows 8

These new capabilities will benefit those who have deployed or plan to deploy Windows 7 or Windows 8 but will leave behind a substantial part of the market using earlier versions, such as Windows XP or Vista. This leads to three immediate recommendations for CIOs still running Windows XP environments:

1. Don't plan on upgrading to Office 2013 until you're ready for that Windows 7 refresh.
2. If you will be in a mixed Windows desktop environment for more than a year, stick with Office 2010, and plan a separate upgrade to Office 2013.
3. If you're still on Office 2007 or 2003, then skip Office 2010 and move directly to Office 2013 as part of your desktop refresh.

SHAREPOINT: INTEGRATED AND FEATURE-RICH CONTENT-CENTRIC WORKLOADS

SharePoint continues to serve the same basic six workloads that were established with Microsoft Office SharePoint Office Server 2007: collaboration, content management, search, business intelligence, sites (portals), and application development. There are substantial changes for the better to several of these workloads, and it's critical to understand them when developing an overall Office and SharePoint strategy.

The Shrinking Gap Between SharePoint And Exchange Promises Benefits

The explicit (though sometimes buried) links between SharePoint and Exchange hold big promise as firms look to consolidate their messaging, collaboration, communications, content, and social tools into a single information workplace. Benefits include:

- **A cohesive user experience.** Features like drag and drop between Outlook and SharePoint promise to streamline the user experience and help consolidate fragmented archiving solutions. But it goes much further to serve IT and other employee requirements, as the seamless movement of content will entice users to put content in the *right* place rather than the convenient place.
- **Common information archiving.** Organizations focus on a broad array of content and application types in addressing regulatory and eDiscovery needs. These needs cannot be met with just email or applications that support content/records management or collaboration. With Microsoft's dominant market share in Exchange and SharePoint, enterprises will welcome Microsoft's initial steps to deliver integrated archiving that now includes the full set of information (e.g., blogs and wikis) related to a SharePoint site.

- **Unified search capabilities.** Administrators, as would be appropriate in an eDiscovery scenario, now can search across SharePoint and Exchange. Incorporating FAST in Exchange is a big deal. Forrester expects this move to have far-reaching implications, not only for compliance and eDiscovery use cases, but also for a mix of broader knowledge management scenarios. Many vendors that offer records/content management and message archiving struggle with separate search approaches.

Traditional Document Collaboration Improves

SharePoint serves multiple workloads but is best when content is involved. Investments in document collaboration and content management will move the product forward in several ways:

- **The user experience improves substantially.** Basic capabilities like locating, checking out, and editing documents were cumbersome in SharePoint 2010 and earlier. With 2013, the interface is simplified and more consumerlike, with simple in-line controls that require less interaction with pull-down menus and Office ribbon controls.
- **Office 365 offers an alternative to Dropbox.** The introduction of SkyDrive Pro as the default storage facility for Office 365 will leverage the cloud to provide synchronization of content across multiple devices to the extent that Microsoft delivers truly agnostic device support. The new functionality will provide IT with alternatives to allowing users to access Dropbox or other nonsanctioned file synchronization solutions.
- **Process-specific templates model common business functions.** Microsoft has begun to extend beyond basic document collaboration by offering these templates. The template for lightweight project management holds particular promise; it's designed to manage basic knowledge worker activities that do not require high-end project management software.

Web Content Management Continues To Gain Ground On Industry Leaders

Microsoft continues to invest in SharePoint to move it from a web publishing platform toward one that can support interactive multichannel experiences. This should help Microsoft compete with other customer experience management (CXM) players such as Adobe and IBM, as well as with pure-play web content management (WCM) players like Sitecore. Areas of particular interest with regard to SharePoint 2013 are:

- **Moving from a page-based model to a component-based model.** SharePoint's current page-based management and publishing model has been a major issue for organizations with high content-reuse needs, such as those with multichannel and/or multilingual initiatives. Moving to a model where content components allow for easier (i.e., business-oriented) reuse of content will make it easier for Microsoft to compete with other WCM systems from CXM.

- **Automated contextualization to benefit business users.** Another current SharePoint shortcoming is the reliance on an IT-oriented business-rules model for supporting contextualization based on demographics or on browsing behavior. CXM vendors increasingly offer semantic-search-based technology to support contextualization, with tools aimed at business analysts rather than technologists. With the full integration of FAST search capabilities, Microsoft now offers a competitive solution.
- **Better partnerships with other vendors in the CXM ecosystem.** No single vendor in the CXM space offers all of the relevant technologies, and even if one did, few clients would have the luxury of ripping and replacing all of the CXM technologies in which they have already invested. Therefore, packaged integrations with CXM components offered by other vendors have taken on particular importance. Microsoft has started down this path, partnering with Webtrends for analytics, optimization, segments, and targeting and with Dynamics AX for basic commerce functionality.

Yammer Will Become The SharePoint Social Engine For Cloud-Ready Organizations

The Yammer acquisition strengthens Microsoft's position in social, which has been a struggle for it. The fast-moving workload has repeatedly outpaced the slower SharePoint delivery cycles. Microsoft made a big bet on social in SharePoint 2013 and assured the market that the next release would not only close the gap but would vault over the competition and include the capacity for rapid, iterative release cycles that would give Microsoft the ability to stay in the lead. The reality is that SharePoint 2013 introduces significant improvements and will be good enough for many but will fall short of best-of-breed offerings.

The placement of Yammer in the SharePoint development and product management team provides Microsoft the best ability to leverage the newly acquired capabilities across the greatest number of Microsoft enterprise assets. It will specifically support SharePoint and the overall Office story by providing:

- **Best-in-breed activity streams that will delight users.** Yammer placed the activity stream at the center of its strategy as both the primary information delivery mechanism and the integration point for most external data. Its manic focus on a consumer-like user experience led to overwhelming positive feedback from Forrester clients. Yammer was a Leader in Forrester's Q2 2012 Activities Streams Wave™.¹

- **A common approach for all Microsoft properties.** Microsoft struggled with “social-enabling” its applications, eventually leading to multiple approaches across multiple products. For example, SharePoint 2013’s activity stream is not the same as that used by Dynamics CRM. Given that social should drive to break down barriers between users and content siloes, this would not be the optimal approach. Yammer represents a social “Switzerland,” which will be agnostic to all Microsoft applications.
- **A “born in the cloud” approach.** It’s entirely possible that the premium Microsoft paid for Yammer was to acquire a leading cloud vendor rather than a leading social vendor. In any event, it got both. With Yammer, Microsoft will have a pure cloud property that it can update without the need to coordinate with customers that have deployed code on-premises.
- **Quick integration into Office 365 SharePoint.** One reason this acquisition is so relevant to Office and SharePoint in particular is that the newly acquired Yammer development team will report to head of SharePoint development, Jeff Teper. This will require the SharePoint team to rationalize overlap between social offerings. Given Yammer’s adherence to a cloud-based services architecture, initial integration will be straightforward and should be available to augment Office 365 in a short period of time.

SharePoint Ubiquity Will Lead To Search Dominance, Despite Some Issues

Microsoft search is poised to become the default choice for new buyers due to the ubiquity of Office and SharePoint in the marketplace, as well as the disruption caused by competitor acquisitions. A critical success factor for search in SharePoint 2013 is how seamlessly search integrates with workers’ disjointed productivity flow — users create and consume content formally and informally, online and offline, and via different devices. Common functionality between SharePoint and Exchange is a plus, as it will support both eDiscovery and personal information management requirements. Other things to consider as you evaluate the search capabilities are:

- **Lack of integration with social.** Forrester expected to see more interconnected functionality between search and the social layer, where the actions and behaviors in activity streams and personal networks would explicitly and implicitly affect the search experience. In addition, Microsoft should prioritize ease of access to non-Microsoft cloud-based systems (e.g., Dropbox) as end users move key enterprise content online.
- **Limited business intelligence/analytics emphasis.** Microsoft did not emphasize the potential use of search to identify latent patterns in information and profiles. As the distinction between structured data and unstructured content blurs, Microsoft will need to define how search in particular and SharePoint more broadly will support analytical processes and aggregated reporting.

- **Relevance enhancements.** The new search will showcase years of R&D and bring the vision of the pre-acquisition FAST team to fruition. Customers will be happy to hear that search is more precise, intelligent, and contextual, both initially (i.e., out of the box) and ongoing (i.e., new approaches to deciphering intent and self-tuning/machine learning).

Developers Will Embrace A Brand-New Customization Model

The environment and the model for custom applications in SharePoint 2013 is a complete departure from the approach in the prior versions of the product. SharePoint 2013 will still run many custom applications built using MOSS 2007 and SharePoint Server 2010. But developers are well advised to move on to the new model for two reasons: first, to avoid the pain of bucking a Microsoft-preferred method, and second, to create more modern, more flexible applications.

Here's what's new and different about SharePoint 2013's custom-development environment:

- **SharePoint and Office development models converge on the same technologies/frameworks.** For the first time ever, developers will use the same technologies and frameworks to build custom applications using Office — Outlook, Word, Excel, and PowerPoint — and SharePoint.² Thus, application skills, tools, and life-cycle management environments can be converged, and code can be used in both Office and SharePoint.
- **SharePoint apps move from pages and websites to true apps.** SharePoint applications have been websites and pages; now they are more like smartphone apps. (Microsoft's built-in SharePoint applications follow this model too.) Developers now create applications that perform discrete tasks, and they can combine them into larger solutions. Think Web Parts as fully realized applications. Also, only the user experience portion of custom applications executes on the SharePoint server (or cloud service). Compiled code executes in an external environment, with Windows Azure being the default option. Gone is the infamous Sandbox, but application deployment can be more complex.
- **SharePoint becomes the coordination point for apps and external services.** By shifting compiled code to external environments, Microsoft has narrowed the role of the SharePoint server from comprehensive application platform to more of a traffic cop for platforms and services. SharePoint 2013 will continue to run a content database, user experience execution, security, and administration services. But it will more than ever coordinate the deployment of applications and access to external services.³

- **User-defined applications tools are in transition.** SharePoint Designer receives a new design face in SharePoint 2013: Visio. But this is just a transitional step toward integral tools to customize SharePoint applications and build simple forms, workflows, and pages. The beginnings of these tools are evident in SharePoint 2013 and Office 365. SharePoint Designer is likely to disappear, probably in the next major release.
- **A focus on open web technologies encourages reuse.** The changes in the developer model to adopt open web technologies that are consistent across product lines, as well as distribution through new marketplaces, are big advances over the current tool set and approach. As companies and service partners tailor the Office tools to specific industry and company needs, these tools and resources will be valuable.

LYNC BECOMES A COMPREHENSIVE UC SOLUTION, BUT IT NEEDS TO GET SOCIAL

Lync is lining up with the enterprise demand to reduce the number of vendors and consolidate unified communications (UC) infrastructures. But looming on the horizon is the need for Microsoft to anticipate the movement of users to a social networking experience to solve their collaboration needs. Here are the key areas of strengths and weaknesses for Lync 2013:

- **Lync is the first in the Office family to offer native clients for iOS and Android.** The Lync team is leading the mobility road map within Microsoft, but enterprise CIOs and individual users are racing ahead faster. Speed is key, but so is user experience. Incorporating touch features and the Microsoft-design-style interface can really set the Lync client apart in the marketplace, if it is done well. Cisco Jabber is in market today with a more definitive mobile timeline and does not carry the baggage of “Windows, first and best” positioning.
- **Conferencing improvements support standards and the Microsoft-design-style UI.** The Lync development team has continued to focus on improving the conferencing user experience and moving it into the touch and Metro-style simplified user interface for voice, video, and webconferencing. In addition, the conferencing tools now support HD video and H.264 SVC to alleviate concerns enterprises have about more proprietary codecs.
- **Lync architecture is robust and moves closer to a private branch exchange (PBX) replacement.** The persistent question as enterprise CIOs consolidate their UC infrastructures continues to be, “Can Lync scale and support the real-time reliability requirements of a traditional PBX?” The high availability, disaster recovery, and scale improvements planned for Lync 2013 are sound and will continue to push Lync as the UC replacement for the enterprise.

- **Lync needs to go social.** A lot of the right elements exist between SharePoint, Yammer, and Lync, but more out-of-the-box integrations have yet to be developed along with demonstrable use cases. Lync capabilities are currently well integrated into SharePoint, Outlook, and the rest of the Office suite, and now it is critical that Microsoft integrate them into Yammer in a timely manner. Failing to drive deep integration between the two will leave the door open for competitors like IBM to offer more tightly integrated solutions.

MOBILITY AND ARCHIVING WILL MAKE LIFE BETTER FOR ADMINS

Exchange is the dominant enterprise email platform on the market, and Microsoft continues to invest heavily as Google moves its enterprise mail offering from the midmarket into larger enterprises. Many of Microsoft's investments in Exchange 2013 are designed to serve the needs of the largest and most complex environments and differentiate Exchange from Google at the high end of the market.

- **Mobile solutions help Exchange in a changing landscape.** The new mobile capabilities solve a clear need for IT pros as corporate IT wrestles with how to securely deliver corporate email to consumer devices in a less obtrusive fashion. Most current solutions require IT to have complete control over the device (i.e., total device wipe) in order to ensure corporate data security. The ability to partially wipe a device is a tremendous benefit for consumerization.
- **Carrying public folders forward will help spur cloud adoption.** The inclusion of public folders will be a boon for cloud adoption. Many customers still struggle with legacy public folders and are challenged to move to Office 365 because of them. Microsoft's guidance to migrate the files to SharePoint proved too daunting for many. Bringing public folders into Office 365 will ease the transition to the cloud and allow organizations to move the content to SharePoint over time if appropriate.
- **Protection and control advances will benefit highly regulated organizations.** The introduction of advanced data loss prevention (DLP) addresses one of the most difficult challenges for information security professionals today. Beyond protecting cardholder data, nonpublic personally identifiable information (PII), and personal health information beyond financial/PII scenarios, enterprises use DLP technology to protect and control trade secrets and other intellectual property. These advanced controls will make Exchange a stronger offering in highly regulated environments.

IMPROVEMENTS AND CHALLENGES SPAN ALL PRODUCTS

The new strategy of coordinating the release of all products in the Office family allows Microsoft to make investments that span and benefit all. It also carries the risk issues permeating all of the products in the family. With Office 2013, we see some of both.

Enhanced Cloud Capabilities Offer A Hybrid Delivery Model

The commitment to cloud delivery and operations is substantial and beneficial. The changes in developer alignment and the investment in operational instrumentation for Office 365 indicate the priority that Microsoft places on the cloud. This will pay off as more customers look for on-demand, subscription-based capabilities with evergreen features and support.

- **Beefed up support for a hybrid deployment becomes viable.** Cloud/on-premises hybrid deployment has been a mostly theoretical discussion for most clients. But the advantages — easier migration, practical deployments and transitions, and business-ready solutions for cross-product workloads like project management — are significant. The advances in the Office server technology, consistency, and tooling indicate that hybrid can be beneficial for Exchange, Lync, and SharePoint in particular.
- **The focus is on Office as a subscription backed by cloud services.** The notion of signing into Office and having it know me — that my apps, documents, and settings follow me — is attractive for employees who have had to come up with their own solutions to access their files across devices.
- **The application marketplace will add value for users and enterprises.** Office as a platform for applications creates more opportunities for business application integration, and the availability of internal and commercial applications will fuel new Office productivity innovations. APIs and marketplaces that enable applike web content to integrate with Office apps and documents will create a better experience for individuals. All of this sets the stage for a third-party ecosystem poised to provide extended capabilities to Office.

Mobile Capabilities Remain A Concern, For Now

With the introduction of robust mobile capabilities in the Windows Mobile environment, Microsoft clearly demonstrates that it understands mobile. It also recognizes the need to support non-Windows devices with Apple iOS support in OneNote and Lync. Consider the following in assessing the Office 2013 approach to mobile:

- **A “Windows Mobile first” approach does not reflect market requirements.** Microsoft has delivered rich capabilities on Windows 8 mobile devices with a particular emphasis to date on its own Surface tablet running Windows RT. Windows Mobile dramatically trails Apple iOS and Google Android in market share. Support for both has been announced for 2013, and it is imperative that Microsoft deliver parity to non-Windows devices in functionality and experience.

- **Partial wipe capability saves a lot of time and hassle.** The ability to partially wipe a device is a tremendous benefit for organizations in a world where users will undoubtedly mix personal and enterprise data on a single device. It is particularly valuable given the rise of “bring your own device” policies, where users are placing corporate data on their personal devices alongside their own data.
- **New mobile solutions offer cost benefits in developing countries.** The challenge isn’t just employees bringing their smartphones into the workplace — global organizations are wrestling with the task of delivering corporate IT services to emerging markets at a price point that makes sense. By offering solutions like Outlook Mobile, Microsoft is providing customers with a tool to securely deliver corporate email to their workforce in these markets at a price point far cheaper than a corporate laptop.

WHAT IT MEANS

KEY DECISION: GET INTO OFFICE EVEN DEEPER?

The question for CIOs is whether or not they should deepen their commitment to Office as a productivity solution, a document management solution, an email environment, and a real-time collaboration solution. The integrations across the products are compelling, but the increasing lock-in is an evaluation point to assess. In addition, as you evaluate this large bet, consider:

- **Does “suite” trump best-of-breed?** By releasing a very robust set of knowledge worker tools, all designed to work together, Microsoft can provide compelling integration. The tradeoff is the ability to mix best-of-breed components into the offering easily. Microsoft will rely on the best-of-breed vendors to provide that integration. Additionally, once committed to the full suite, removing any single component from the user experience will be more complex because of the interdependencies of the integrated strategy.
- **Will the pace of innovation be good enough for you?** With the exception of Yammer, Office products run on a common code base that serves Office 365 as the cloud offering as well as on-premises implementations. While this offers benefits in terms of hybrid deployments, it ultimately will hinder the rate of continuous innovation that Microsoft can sustain when compared to pure, best-of-breed cloud offerings like those from Google and salesforce.com. Microsoft has shared that the future pace of releases will be faster than the traditional three-year cycle; this is good news, but it will not match the pace of innovation of pure cloud offerings like Yammer anytime soon.

- **Could Microsoft's mobile strategy hinder success in Android and iOS shops?** With the introduction of the Surface tablet and the latest push with Windows Mobile and Windows RT, it's clear that Microsoft intends to aggressively challenge Google and Apple's dominant market positions in smartphones and tablets. This strategic imperative appears to have yielded an Office strategy that produces Windows Mobile clients first and makes Apple iOS and Google Android users wait. If Microsoft takes a "Windows first and best" approach in order to use Office to drive Windows Mobile adoption, iOS and Android shops will suffer.
 - **Will Microsoft integrate social capabilities with Yammer?** At SharePoint Conference 2013, Microsoft did a very careful and deliberate dance around new social capabilities in SharePoint and new opportunities with the Yammer acquisition. Microsoft's (not just SharePoint's) social story needs to be built around Yammer. Those not ready to move the social workload to the cloud should be prepared to use third-party add-ons like NewsGator or Neudesic Pulse. If Microsoft is "all-in" on the cloud, this is what "all-in" looks like.
 - **Will Lync integration with Skype provide IT a bridge to unified communications?** The need to communicate and collaborate across business boundaries is one of the biggest drivers of consumerization of collaboration. Skype is a premier consumerization brand in this regard. Anchoring Skype sessions on Lync provides better security and logging capabilities that are lacking in pure Skype-to-Skype sessions.
 - **Would lack of touch-first and cross-platform delivery hinder adoption?** Initial Metro innovations like the radial menu in OneNote are impressive, but we expected to see more touch-first rather than touch-enabled applications (Outlook). The lack of availability on devices is the biggest problem and is disappointing.
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ENDNOTES

- ¹ In Forrester's first 19-criteria evaluation of activities streams vendors, Forrester identified the five significant players — Neudesic Pulse, Salesforce Chatter, Socialcast by VMware, Tibco tibbr, and Yammer — and researched, analyzed, and scored them. This report details our findings about how each vendor measures up, and it plots where they stand in relation to each other. See the May 17, 2012, "[The Forrester Wave™: Activities Streams, Q2 2012](#)" report.
- ² The foundation technologies are HTML5, CSS3, and JavaScript, serviced by REST APIs, JSON, OAuth, and OData. Office and SharePoint now also share a common packaging deployment format.
- ³ The new deployment format for Office and SharePoint applications includes a manifest to direct the SharePoint server on what to deploy, where, and how. When a user invokes an application, SharePoint loads its user experience, and then invokes the logic and services behind the user experience.

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