

Success in the Digital Experience Economy Requires Connecting MX, UX, CX and EX

Published 26 May 2020 - ID G00720630 - 23 min read

By Analysts [Jason Wong](#), [Michael Chiu](#), [Gavin Tay](#), [Brent Stewart](#)

Initiatives: [Applications and Software Engineering Leaders](#)

In the digital experience economy, businesses compete by transforming products or services so that they stand out as memorable experiences. To succeed, IT leaders must build relationships to connect customer experience, employee experience, user experience and multiexperience.

Additional Perspectives

- [Summary Translation: Success in the Digital Experience Economy Requires Connecting MX, UX, CX and EX](#)
(24 December 2020)

Overview

Opportunities and Challenges

- IT leaders face ongoing disruptions, as well as opportunities, even in times of economic uncertainty. In the digital experience economy, they face the non-stop proliferation of new devices, digital touchpoints (wearables, immersive, chatbots, IoT, etc.) and modalities of interaction (no-touch, natural language, gestures, vision, etc.).
- The COVID-19 pandemic has elevated the importance of digital experiences for customers and employees. IT leaders must increase the urgency of modernization and transformation of products and services into experiences through applying digital technologies.
- Business units and IT organizations still operate in silos for customer experience (CX) and employee experience (EX) strategies, which lead to increased technical, process and data debt for everyone. Interweaving CX and EX practices will lead to mutually beneficial outcomes and experiences.
- Within most organizations, the user experience (UX) discipline is still maturing in skills and methodologies, and a multiexperience (MX) approach to architecture and development is typically lacking. Investing in both areas together can improve business value and agility.

What You Need to Know

IT leaders should:

- Learn from digital experience gaps uncovered during the pandemic and prioritize initiatives that impact overlapping CX and EX to maximize shared outcomes and value.
- Modernize the front-end UX of your business applications with a focus on MX interoperability and modularity to enable a path toward the future of applications where assembly and composability are essential.
- Charter a UX community of practice across business and IT for sharing design and fostering ideas to impact CX and EX strategies and link to related centers of excellence.

Strategic Planning Assumptions

Through 2024, organizations with an established multiexperience strategy will outperform competitors in customer experience and employee experience satisfaction metrics.

By 2023, 40% of professional workers will orchestrate their business application experiences and capabilities like they do their music streaming experience.

By 2023, customers will prefer to use speech interfaces to initiate 70% of self-service customer interactions, up from 40% today.

By 2023, 50% of all major business applications will include at least one of more types of no-touch experience.

Insight From the Experts

Digital is the Universal Currency in the Experience Economy

In this new decade that has begun with COVID-19, customer and employee interactions are more remote, mobile, virtual and distributed, and this will become part of the fabric of society.

The “experience economy” was first described in a 1998 article in the Harvard Business Review by two professors, Pine and Gilmore.¹ Their position is that businesses over the past centuries have evolved from agrarian to industrial to services to experience economies. The experience economy is what we are in the midst of now and it continues to change rapidly, driven by generational, economic, cultural and societal change. Today, their book, “Experience Economy,” is in its third edition, but the focus on *digital experience* is more important than ever. Digital has become the common currency in the terms of how transactions and interactions are experienced.

In the experience economy, the memories, emotions and feelings that customers take away are ultimately what matters most. Products and services become commoditized over time; they are copied by competitors and lose their differentiation and value. The shift toward digital business can be seen as largely being about creating new business models and innovations that allow companies to alter their products and services through information and digital technologies. Not only must digital be a building block of CX, it must also be foundational to your EX.

In this digital experience economy, in order for companies to earn their share of the positive feelings, emotions and memories, they need to compete for attention and time. Attention and time are precious because we, as customers and employees and users of technology, only have so much time in the day and we can only give so much attention at any given moment. Any wasted motion or non-value-added feature unnecessarily steals the user's attention and consumes their time. This is why it is incredibly important to design and deliver great experiences by mastering UX and MX principles.

To create these enduring memories for customers, it is going to take a team effort in its most extreme form: CX must become the job of every employee at your organization. One customer going through just one journey — returning an item, for example — will in actuality involve multiple departments. These departments will need to work in close collaboration with one other, and this is no place for organizational silos. So CX is increasingly determined by EX. To take that one step further, construct your EX to provide the right work environment for employees to build outstanding CX. Strengthen it with thoughtful UX, and customize it for customers via flexible MX. This is how to provide enduring memories for your customers in the digital experience economy.

As you can see, MX, UX, CX and EX — or collectively what Gartner calls “total experience” (see “[Top Strategic Technology Trends for 2021](#)”) — are inextricably intertwined in the digital experience economy. This document provides a guide to curated Gartner research containing important concepts, insights and best practices to help IT leaders connect these four areas in order to be successful.

Kind regards,

Jason Wong

Michael Chiu

Gavin Tay

Brent Stewart

Executive Overview

Definitions

Gartner defines MX, UX, CX and EX as follows:

- MX: The interaction across a variety of digital touchpoints (e.g., web, mobile apps, chatbots, AR/VR, wearables) using a combination of interaction modalities (e.g., touch, voice, vision, gesture) in support of seamless and consistent digital user journeys.
- UX: The singular and/or aggregated experiences that occur for users as a result of interacting with a product in a given context. Common contributing factors to a user experience include the product's graphic design, interaction design, and content, both written and visual.

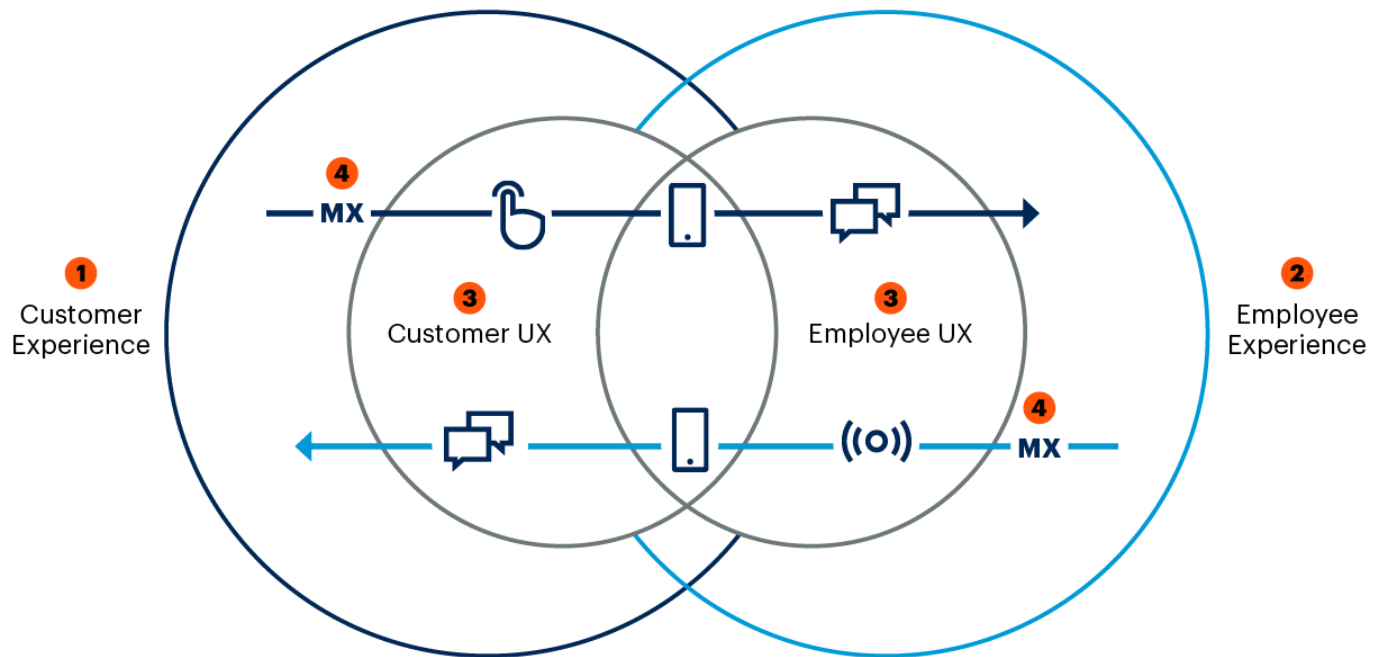
- CX: The customer's perceptions and related feelings caused by the one-off and cumulative effect of interactions with a supplier's employees, systems, channels or products.
- EX: The employee's perceptions and related feelings caused by the one-off and cumulative effect of interactions with their employer's customers, partners, leaders, teams, processes, policies, tools and overall work environment.

While excellence in one area is valuable, the organization as a whole can be further strengthened if these four disciplines are intertwined as a total experience strategy so that they mutually reinforce one another.

Success in the digital experience economy requires a holistic and integrated approach to multiple facets of experiences. These four disciplines (see Figure 1) must meld together cohesively.

1. CX strategies need to generate enduring memories of the product or service by incorporating great EX, UX and MX principles.
2. Leading companies in CX invest heavily in EX, particularly by empowering frontline workers with MX capabilities and great UX in the digital workplace.
3. Great UX strategies reduce effort and friction by designing for an MX world in support of CX and EX.
4. MX strategies are required to address the architectural and development needs of organizations to support customer and employee UX, particularly the overlapping experiences that are most impactful.

Figure 1: Connecting MX, UX, CX and EX Into a Total Experience Strategy

Connecting CX, EX, UX and MX

Source: Gartner
720630_C

Gartner®

When a total experience strategy is executed in harmony and synchronicity, you can deliver transformative and memorable experiences for customers, employees, and all users of your digital products and services.

Accomplishing this feat will take time, the buy-in and involvement of key executives in marketing, sales, customer service, HR, operations and IT. It requires continuous updating of the respective strategies based on changes that ripple across all four disciplines. To get you started, we have curated a set of recently published research notes across MX, UX, CX and EX topics to guide you to:

- **Set the vision:** Why this interconnected strategy should be a priority, even in the face of uncertainty.
- **Rally the right people:** Whom do you need to engage, empower or support?
- **Invest in the right things:** What are the key technologies, skills and practices that you need?
- **Take measured next actions:** How do you implement and continuously improve this interwoven strategy?

Research Highlights

Set the Vision

According to the 2019 Gartner CEO and Senior Business Executive Survey, 82% of CEOs have a digital transformation or management initiative, up from 62% in 2018.

Chances are that your organization has already been working on some initiatives supporting digital business transformation and optimization strategies. These may have included programs like modernization of workplace tools, migration to the cloud, integrating SaaS and on-premises applications, and expanding customer service channels. They are valid and worthy initiatives, but now as the economic impact from COVID-19 policies is being experienced globally, how will you prioritize where your precious funds, resources and time will go over the next 12-24 months?

We can all be certain that customer and employee behavior will never be like they were before COVID-19. More than ever, you still need to plan for success in the digital experience economy. It will be based ultimately on delivering business outcome-driven experiences that drive customer value and employee empowerment. And this means a continued focus on CX strategy, but with an equal emphasis on EX strategy in support of the customer, rather than regarding EX as “nice to have” or in a silo.

Set your vision by using the research in this section to:

1. Build links between MX, UX, CX, and EX to mutually reinforce those strategies.
2. Create an action plan to address budget cuts to CX.
3. Translate customer centricity into a new set of improved actions to support digital business.
4. Shape strategic planning on the customer of the future in a digital society.
5. Improve EX to positively impact CX.
6. Identify employee-centric practices to create a high-quality employee UX.
7. Embrace MX for great CX by addressing new digital touchpoints and interaction modalities.
8. Update your application strategy to exploit emerging digital experience technologies.

Related Research

[“Build Links Between Customer Experience, Multiexperience, User Experience and Employee Experience”](#)

Customer experience, multiexperience, user experience and employee experience are often misunderstood, preventing their potential from being fully realized. To maximize the benefits of these functions, application leaders must first understand them, then interlink their underlying activities.

[“What to Do If Your Customer Experience Budget Gets Cut”](#)

CX teams often face four challenges hindering their organization from becoming more customer centric, one of the most common being budget cuts resulting from economic pressure. Application leaders supporting CX can use this research to create an action plan that tackles this challenge directly.

[“Digital Business Requires Organizations to Focus on Customer Centricity”](#)

As organizations build digital business, ignoring customer experience will lead to failure of the digital business model transformation for almost all organizations. Application leaders must translate customer centricity into a new set of improved actions to support digital business.

[“How Customer Experience Changes When Your Customer Is a Thing”](#)

Internet-connected things and ambient artificial intelligence are gaining the ability to act on behalf of human customers. Application leaders supporting customer experience can use this research to shape strategic planning on the customer of the future in a digital society.

[“Improve Employee Experience to Drive Improvements in Customer Experience”](#)

Organizations recognize the importance of great customer experience but are often challenged to identify why the employee experience is equally critical. Application leaders must recognize how employees impact the customer experience and the steps needed to improve the employee experience.

[“Proven Design Principles to Deliver a High-Value Employee User Experience”](#)

Employee user experience impacts productivity and engagement, but only a minority of employees have a high-quality UX. This research examines the impact of employee UX on key business outcomes and identifies employee-centric practices for application leaders to deliver a high-quality employee UX.

[“Transcend Omnichannel Thinking and Embrace Multiexperience for Improved CX”](#)

Omnichannel has been around for a long time, yet most organizations have not delivered on its promise of a unified customer experience. Instead of chasing channels, application leaders should embrace multiexperience for great CX by addressing new digital touchpoints and interaction modalities.

[“Update Your Application Strategy to Exploit Emerging Digital Experience Technologies”](#)

Application leaders are overwhelmed by operational support, preventing innovation with emerging digital experience technologies — such as multiexperience and AR/VR. Application leaders must work with business stakeholders to enable, orchestrate and design business innovation in user experience.

Rally the Right People

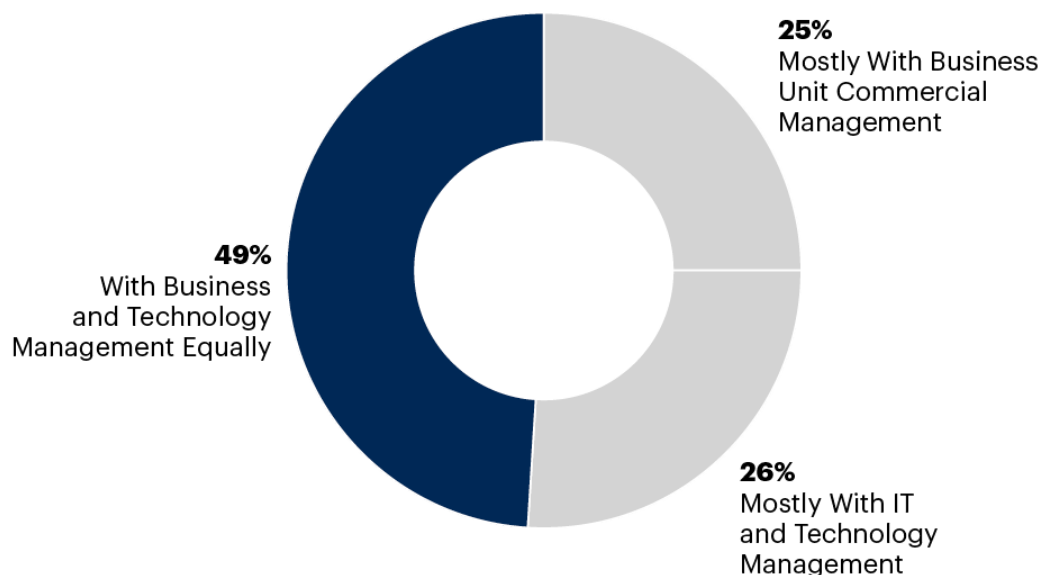
All investments have a human element in terms of the decision-makers, the people implementing the strategies, and the end users being impacted. Economic uncertainty will lead most C-level executives to instinctively think about cost optimization rather than investing in the next great experience. Internal resources will be tightened and stretched thin, while outsourced providers need to prove their value more than ever. And customers and employees will have different outlooks individually in the aftermath of COVID-19. Customers may be defecting or trading down, or interacting less, or weighing alternatives. Employees may be anxious about their futures, new ways of working, and their safety.

Figure 2: Where CEOs Place Responsibility for Digital Products and Services

Where CEOs Place Responsibility for Digital Products and Services

Percentage of Respondents

Responsibility for the performance and quality of our digital products and services lies ...



n = 473 (all respondents)

Q: Complete each statement with the answer you agree with the most.

Source: 2019 Gartner CEO and Senior Business Executive Survey

720630_C

Gartner

Most CEOs expect IT and business executives to work together equally to own the digital initiatives. IT leaders must reach out and broker conversations to keep momentum going, even in these tough times. At the top of the list should be improving the experiences that keep customers and employees engaged. Less effort, fewer steps, faster outcomes and quicker answers are needed. But, you must carefully navigate this changed landscape to know how to engage, empower and support each of these stakeholders in delivering your digital experiences for customers and employees.

Rally the right people by using the research in this section to:

1. Create an action plan to get direct C-suite buy-in for CX.

2. Gain support for CX from mid-level functional leaders.
3. Identify the skills, roles and team composition of UX professionals to ensure high-quality experiences.
4. Help workers obtain and embrace choice to best satisfy themselves even in extremity.
5. Reassure users and regulators that personal data is handled both lawfully and ethically by focusing on their privacy UX.
6. Promote an enablement mindset from infrastructure and operations (I&O) throughout IT to boost workforce digital dexterity.
7. Engage service providers that focus on EX in their digital workplace programs.
8. Define new managed workplace service contracts on UX, instead of on traditional IT SLAs.

Related Research

[“What to Do If C-Suite Executives Stall the Launch of Your Customer Experience Initiative”](#)

CX teams often face four challenges hindering their organization from becoming more customer-centric. One of the most common is when executives are unconvinced of the need to launch an initiative. Application leaders can use this research to create an action plan to get direct executive buy-in.

[“What to Do When the C-Suite Endorses CX, But Next Level Pushes Back”](#)

Application leaders face common challenges in improving CX. A lack of support from midlevel functional leaders despite an executive mandate is a key one. Application leaders supporting CX can use this research to create an action plan that tackles this high-stakes situation directly.

[“How to Build a User Experience Team”](#)

Application leaders must identify the skills, roles and team composition of their UX professionals to ensure high-quality experiences as well as ongoing innovation. They should not look for multirole UX practitioners, but instead build a team whose members have overlapping competencies in key areas.

[“Satisfy Digital Workers and Improve Employee Experience by Embracing Choice of Workplaces and Tools”](#)

Digital workers achieve the best productivity when they can choose their own workplaces, devices and applications, but such individuality can be elusive. Application leaders responsible for the digital workplace can help workers make choices to best satisfy themselves even in extreme situations.

[“Practical Privacy – A Definitive Guide to Privacy UX”](#)

Privacy UX is composed of the aspects of a privacy program that are exposed to the public, where weaknesses are laid bare for all to see. Security and risk management leaders must reassure users and regulators that personal data is handled both lawfully and ethically by focusing on their privacy UX.

[“Enablement Mindset Is the Missing IT Ingredient to Improve Workforce Digital Dexterity and the Employee Experience”](#)

I&O leaders often measure success by system stability and security, ignoring employee use of technology. A hands-off approach not only inhibits adoption, but also often leads to incorrect use. We analyze the impact that enablement can have on digital workplace success.

[“Deliver Digital Workplace Programs With Service Providers That Focus on Employee Experience”](#)

Application leaders leading digital workplace programs should engage service providers that can incorporate business and cultural issues into their technology. To successfully deliver digital workplace transformation, apply these best practices when working with service providers.

[“Contract for User Experience When Outsourcing Managed Workplace Services”](#)

Creating an engaging and empowering digital workplace experience has become a cornerstone for digital business success. Sourcing, procurement and vendor management leaders must center new managed workplace service contracts on the user experience, instead of on traditional IT SLAs.

Invest in the Right Things

In a 2019 Gartner CX Management survey, of those respondents who exceeded customer perceptions, almost two-thirds (63%) report their organization takes an aggressive stance to tech adoption. This means they are willing to adopt emerging technologies that are considered riskier than mainstream, maturing technologies.

As we enter a post-COVID-19 digital world, user interactions globally are undergoing a significant shift in how customers engage and employees do their work. The pandemic forced organizations to take some MX ideas from “nice-to-have” to “must-have.” More remote and mobile app access is expected, such as video conferencing and mobile commerce. Conversational interfaces, such as chatbots and smart speakers, are becoming essential to key business functions, like customer self-service. Virtual reality (VR), augmented reality (AR) and mixed reality (MR) are changing the way people diagnose, collaborate, train and work from home. Wearables and IoT devices are leading to an ambient, always-on digital experience both at home and at work, which might now be the same place for many people.

You need to apply a MX mentality when creating digital experiences in support of new CX and EX expectations. But these new technologies also require new skills and techniques. Training and hiring these resources are essential because of the vast UX challenges across the permutations of devices, digital touchpoints and interaction modalities.

Invest in the right things by using the research in this section to:

1. Identify new experience technologies and leverage them to improve user satisfaction and business performance.
2. Understand how people interact with and experience digital technology to determine success.
3. Build and maintain an effective DesignOps practice that enables operational alignment, deep collaboration and ongoing innovation.
4. Use customer analytics tools to identify CX opportunities.
5. Apply mesh app and service architecture (MASA) to deliver a seamless UX and enable integration agility.
6. Deliver distinctive UX rapidly and consistently using an MXDP.
7. Adopt hybrid headless “content as a service” to provide more flexibility and versatility to support MX and CX.
8. Create a composable intranet enabling MX as the centerpiece of enterprise digital workplace strategies.

Related Research

[“Top 10 User Experience Technologies That Will Drive Innovation”](#)

The definition of user experience will be revolutionized by new devices, contexts and technologies. Enterprise architecture and technology innovation leaders, including CTOs, must identify new experience technologies and leverage them to improve user satisfaction and business performance.

[“The Leading Trends in Digital Experience – 2020”](#)

Willingness to engage with digital technology will become a key factor in determining any system’s success. CIOs must ensure that their organization puts as much effort into understanding how people interact with and experience digital technology as they put into tracking technology itself.

[“DesignOps: Organize, Collaborate, and Innovate Product UX at Speed”](#)

UX has become a core capability of mature digital product teams. To optimize the quality and delivery of digital products, application leaders must build and maintain an effective DesignOps practice that enables operational alignment, deep collaboration and ongoing innovation at the product level.

[“Use Emerging Customer Analytics Tools to Identify CX Opportunities”](#)

Understanding customer sentiment, needs and wants in real time is becoming critical for CX excellence and finding new opportunities. Product managers seeking to grow revenue and find new opportunities should look for suitable customer analytics tools.

[“Use MASA to Deliver an Agile Multiexperience Enterprise Application Architecture”](#)

Continuous customer experiences across multiple channels and changing business needs require an agile architecture for enterprise applications. Application technical professionals responsible for enterprise applications apply MASA to deliver a seamless user experience and enable integration agility.

[“Technology Insight for Multiexperience Development Platforms”](#)

Great companies don't just build apps, they build experiences. Application leaders need a multiexperience development platform to deliver distinctive user experiences that span multiple devices, digital touchpoints and interaction modalities efficiently and rapidly.

[“Hybrid Headless Content as a Service Is the Future of Digital Experiences”](#)

Modern businesses must provide optimal digital experiences across a growing variety of channels. This multiexperience strategy requires hybrid headless “content as a service” to provide more flexibility and versatility to digital workplace application leaders responsible for customer experience.

[“Traditional Intranets Are Dead – Modern Intranets Are Alive and Well: Part 2”](#)

Most traditional intranets use only the “destination site” delivery model, whereas modern intranets offer various delivery options for diverse types of workers. Application leaders must create “composable” intranets that enable “multiexperiences” and form the center of digital workplace strategies.

Take Measured Next Actions

In a Gartner strategy survey, we found that a third of respondents have adopted an integrated business and IT strategy. However, a significant proportion (54%) of still enterprises use the more traditional approach of creating a separate IT strategy. These enterprises, together with the 13% that do not define or document any form of IT strategy, are unlikely to fully exploit their potential to succeed in the digital world.

Digital transformation and optimization initiatives require a lot of change to processes, methodologies and thinking, such as adopting enterprise agile, DevOps, and product-centric delivery. These shifts help align and integrate business and IT strategies toward common value delivery for CX and EX outcomes. To implement an MX strategy across both customer and employee UX, IT leaders also need to employ specific and measured practices to connect CX and EX.

Without understanding and mastering these modern practices, success in the digital experience economy is harder to measure and achieve. You need to change the way your organization thinks about and invests in these practices because they are critical to the upfront understanding of the interwoven opportunities between CX, EX, UX and MX.

Take measured next actions by using the research in this section to:

1. Demonstrate the value of user experience using key performance indicators.
2. Eliminate bias in your design process to drive improvement in CX.
3. Build an employee UX mindset across the product organization (LEGO case study).
4. Apply design thinking to create products, services and experiences that are compelling.
5. Extend “best next digital experience” to a wide range of content, services, application and design elements.
6. Organize a customer journey mapping workshop to lessen the complexity and deepen their knowledge of customers.
7. Incorporate CES and CSAT scores to utilize the most effective information to drive growth.
8. Design dialogue for conversational experiences to achieve success and sustainability.

Related Research

[“How to Prove the Value of User Experience Design”](#)

This note introduces the Gartner UX Value Framework, which provides application leaders with the means to demonstrate the value of user experience using key performance indicators from four perspectives: the business, the brand, the customer, and the employee.

[“Eliminate Bias in Your Design Process to Drive Improvement in Customer Experience”](#)

To ensure customer experiences meet customers’ needs, loyalty and customer relationship leaders must check for biases at key stages during the experience design process. Improve design processes and use customer insight to overcome four common cognitive biases that undermine the design process.

[“Case Study: Embedding an Employee UX Mindset In Product Teams \(The LEGO Group\)”](#)

Application leaders at the LEGO Group scale the impact of UX expertise across the portfolio of employee-facing applications by providing product team members with the knowledge and support they need to

promote user-centric development for their products. This builds an employee UX mindset across the product organization.

[“Ignition Guide to Conducting a Design Thinking Workshop”](#)

Understanding customers’ real needs is essential to the new product development process. Using this guide, R&D leaders can apply the principles of design thinking to help their teams create products, services and experiences that are compelling to customers.

[“Understanding and Delivering the Best Next Digital Experience”](#)

The best next digital experience is a critical concept to winning in the experience economy. Application Leaders in charge of digital experiences need to understand and apply this concept to increase the effectiveness of their overall digital presence.

[“How Customer Journey Mapping Workshops Can Improve Product Experiences”](#)

A thorough understanding of customers’ product experiences is a challenging but essential task. Product managers should use customer journey maps and organize a customer journey mapping workshop to lessen the complexity and deepen their knowledge of customers.

[“Growing Organizations Rely More Heavily on CSAT and CES Than Nongrowing Organizations”](#)

A recent Gartner survey indicates that a higher number of growing organizations use CSAT and CES to measure the customer experience. Product managers seeking to become CX leaders should incorporate CES and CSAT scores in order to utilize the most effective information for growth.

[“Designing Conversational Experiences for Chatbots and Virtual Assistants”](#)

Enterprises are rapidly adopting conversational platforms to build chatbots and virtual assistants. Application leaders need to look beyond the technology to the implementation and design of dialogue to achieve success and sustainability.

Gartner Associates Supporting This Trend

Ed Thompson

Don Scheibenreif

Olive Huang

Jessica Ekholm

Gene Phifer

Irina Guseva

Mick MacComascaigh

Magnus Revang

Brian Prentice

Van Baker

Anne Thomas

Arun Batchu

Adrian Leow

Evidence

¹ B.J. Pine II and J.H. Gilmore, [“Welcome to the Experience Economy,”](#) Harvard Business Review, 1 July 1998

The 2019 Gartner CEO and Senior Business Executive Survey is part of Gartner’s research into CEO and C-level business executive concerns, priorities and attitudes toward technology-related issues. For this annual survey, 473 responses were collected in 32 countries during 4Q18, from leaders of companies with \$50 million or more and 60% with \$1 billion or more in annual revenue. The survey was developed collaboratively by a team of Gartner analysts who examine IT’s role in business, and was reviewed, tested and administered by the Gartner Research Data and Analytics (RDA) team. The results of this study are representative of the respondent base and not necessarily business as a whole.

Gartner’s 2019 Customer Experience Management Survey: Results presented are based on a Gartner study to confirm how organizations are measuring CX and to validate how certain tools (such as personas and journey maps) are or are not driving value. The survey is also designed to measure how expectations of and commitment to CX investments are changing and to gain understanding on how user research informs or helps CX. The primary research was conducted online from May 2019 through June 2019 among 401 respondents in Canada, the U.K. and the U.S. from different industries. Respondents were required to be a leader or member of the team responsible for CX and have involvement in customer experience programs and initiatives. Seventy-nine percent of the respondents came from organizations with \$1 billion or more in annual revenue. The respondents came from a variety of industries: financial services (56), high tech (56), manufacturing (51), consumer products (44), media (51), retail (58), healthcare providers (48), and travel and hospitality (37).

The 2019 Gartner Strategy Survey covered 342 respondents from six countries and eight industry groups, with enterprises ranging in size from \$250 million in revenue to over \$10 billion. Qualified respondents were senior executives who are involved in making decisions on business strategy, including both CIOs and non-IT roles. The primary research was conducted online from July through August 2019. The study was developed collaboratively by Gartner analysts and the Research Data and Analytics team.

© 2021 Gartner, Inc. and/or its affiliates. All rights reserved. Gartner is a registered trademark of Gartner, Inc. and its affiliates. This publication may not be reproduced or distributed in any form without Gartner's prior written permission. It consists of the opinions of Gartner's research organization, which should not be construed as statements of fact. While the information contained in this publication has been obtained from sources believed to be reliable, Gartner disclaims all warranties as to the accuracy, completeness or adequacy of such information. Although Gartner research may address legal and financial issues, Gartner does not provide legal or investment advice and its research should not be construed or used as such. Your access and use of this publication are governed by [Gartner's Usage Policy](#). Gartner prides itself on its reputation for independence and objectivity. Its research is produced independently by its research organization without input or influence from any third party. For further information, see "[Guiding Principles on Independence and Objectivity](#)."