

white paper

The State of Digital Transformation:

A Customer-Led Perspective on
Strategies, Obstacles, and Best Practices
for Digital and Data Success



Executive Summary

Digital transformation isn't just a buzzword - it's a foundational shift in how an organization delivers competitive value in the digital age.

Knowing the pressure for enterprises to adapt and disrupt, Pivotree set out to ask our customers what their digital transformation plans look like for the next three to five years, as well as the challenges that stand in their way.

The following report combines our research findings with insights into what transformation truly entails, as well as guidance from our data and digital mavens to help ensure your company is on the right course.

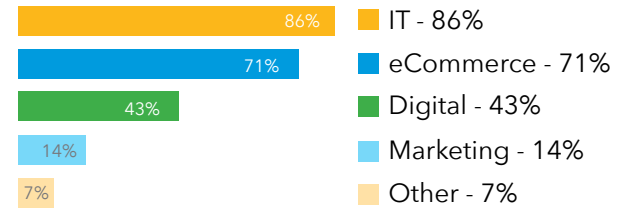
Respondents Breakdown

Before we dive into the results, here is an overview of our survey respondents.

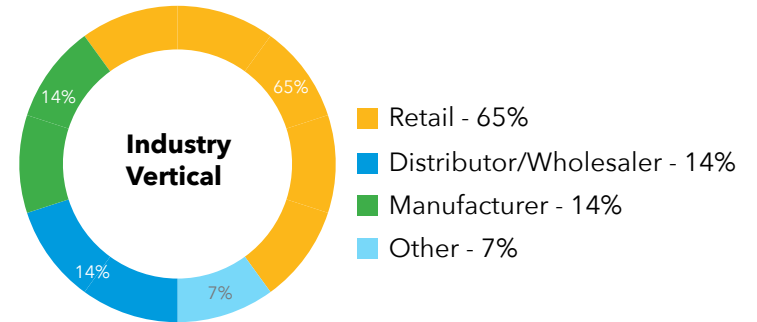
A majority of respondents come from the Retail industry (65%), while Distributor/Wholesaler (14%) and Manufacturer (14%) are also represented. Over half of respondents work for SME-sized companies, with the rest of the pool representing SMB (31%) and Enterprise (14%).

Over half of respondents come from Director and Specialist roles, but we also heard from C-level executives, VPs, and Managers. Specialities include primarily IT (86%), eCommerce (71%), and Digital (43%). Forty-three percent also said they specialize in both B2B and B2C.

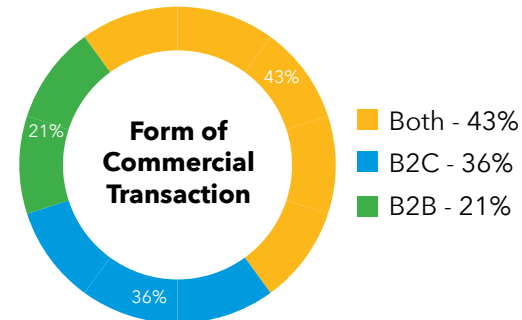
Specialty



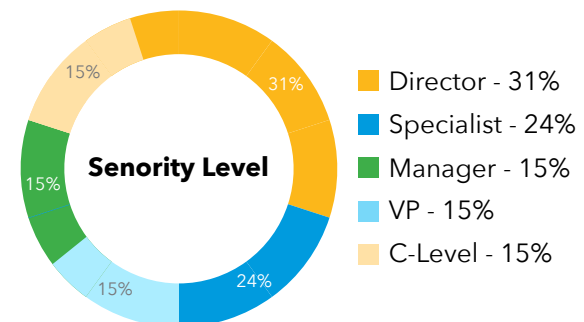
Industry Vertical



Form of Commercial Transaction



Seniority Level



Evaluating Growth Strategies

Our survey found that a strong majority (78%) of respondents consider **Digital Channel Expansion** to be their primary growth strategy for the next 3 to 5 years. This aligns with the overall push toward a seamless customer experience across emerging channels.

According to Aberdeen Group, "companies with the strongest omnichannel customer engagement strategies retain an average of 89 percent of their customers, compared to just 33 percent for companies with weak omnichannel strategies."¹

Digital channel expansion can mean different things to different companies. In today's connected world, nearly all businesses have some type of eCommerce presence, but may wish to add additional sites or extend their reach to marketplaces like Amazon, Google, or Alibaba. Other companies may want to look at **Geographic Expansion** (noted by 36% of our respondents) by targeting new regional markets.

PRIMARY GROWTH STRATEGIES: for next 3-5 years



Product Expansion is another key growth area, with 64 percent identifying it as their primary growth strategy. Interestingly, Digital Channel

Expansion goes hand-in-hand with Product Expansion, because selling via digital channels opens up new opportunities for an endless aisle product approach.

Understanding the mission-critical nature of digital channel expansion is just the beginning. Let's take a look at what drivers are pushing businesses toward transformation.

What's Driving Digital Transformation?

When it comes to what is driving the overall digital transformation strategy, our survey respondents say that **increased customer expectation** is the top driver (79%), followed by **new customer acquisition** (64%) and **wallet share increase** (43%).

Satisfying customer expectations is becoming more complex by the day. Why? Because their expectations are changing at an alarming rate. This is the only time in history in which our customers have so many communication preferences (face-to-face, direct mail, email, chat, text, phone, social media, etc.). It can be difficult to know how to strategize and invest.

Furthermore, nearly every industry is affected by rising customer expectations, and it spans across B2B and B2C. To achieve digital transformation, enterprises must focus on understanding, meeting, and exceeding customer expectations.

We see the customer expectation revolution taking place in three key areas:

1. The Amazon Effect

Love it or hate it - you simply can't talk about customer experience without talking about

Amazon. The site has truly set the standard for the modern product content experience - so much so that Amazon now surpasses Google as the go-to for product search.²

The irony is that the deluge of product content - from descriptions, images, videos, comparison charts, recommendations, and peer reviews - has left customers hungry for more. The 'Amazon effect' means that customers now expect more of the same, but better.

Businesses can reference Amazon's success as a guide, but they also must realize that there are opportunities to exceed that experience by applying niche-specific content and services.

THE PACE OF CHANGE IS DRAMATIC

Traditional companies have struggled to keep pace, with poor data and organizational silos as major barriers to agility.

2. Regulatory Compliance

Regulatory compliance may be the dark horse of customer expectations. It's not always an obvious driver, but the reality is that the moment a law is passed, it becomes part of the customer experience.

When it comes to regulations (like RoHS, California Proposition 65, or nutritional standards), customers have two primary expectations. First, they expect regulatory details to be trustworthy and easy to locate.



Second, they expect that companies will continue to improve their offerings to align with standards.

When agencies release new regulations, companies must move fast to identify affected products and make updates across channels, with trading partners, and to packaging. In some cases, they may even need to pull and replace products that don't meet certain standards. Failing to do so can result in damaged trust, as well as costly fines and product recalls.

3. The Fulfillment Imperative

With an array of fulfillment options, customers have developed expectations around receiving items when, where, and how they choose.

Driven once again by big digital players, we've seen delivery cycles tighten from weeks to days, to hours or even minutes. Customers can make purchases from any channel, and receive that purchase at home, by the curb, in the store, or even at a locker near their home or travel destination.

In reality, the customer doesn't care where the delivery or pick-up comes from - they just expect the experience to be convenient, seamless, and fast. That means that the lines between manufacturer, distributor, and retailer/merchant will continue to blur.

With customer expectations on the rise, companies need to move fast to evolve and adapt. Let's take a pulse on how organizations view their digital maturity and readiness to act.

DATA IS OFTEN AN AFTERTHOUGHT

Yet nothing advanced works without a solid data foundation. It's the glue that holds every end-to-end customer experience together.

Taking a Pulse on Digital Maturity

When we asked customers about their state of digital maturity, nearly a third of respondents said *they are in early stages* (21%) or *just getting started* (7%). While 21 percent consider themselves *data-driven organizations*, 50 percent note they are *making steady progress* toward their goals.

The problem is that steady progress may still fall short in a culture of innovation. Speed and agility are key characteristics of a successful digital transformation strategy. According to Gartner, two-thirds of business leaders believe their companies must pick up the pace of digitalization to remain competitive.³

Companies must evaluate whether they operate as reactive, maintained, proactive, and predictive. Unfortunately, the reality is most companies still fall into the reactive or maintained (i.e., just keeping up) category. To close the gap between customer expectations and their offerings, businesses must be ahead of the curve, landing in the proactive and predictive space.

It's a tall order for companies that still struggle to provide the frictionless experiences that customers across B2C and B2B demand. So, what's holding them back? Let's take a look at what companies say are their biggest obstacles to growth and digital transformation.

Digital Transformation Obstacles

Customers reported that some of the biggest obstacles to achieving digital transformation are: **Technology is not fit for purpose (38%), Slow time to market (31%), and Lack of data availability (31%).**

Let's explore these three.

#1: Technology is lacking

Spending on technology to support digital transformation is widespread. According to IDC research, 40 percent of all technology spending will go toward digital transformation, with enterprises spending in excess of \$2 trillion through 2019. ⁴

Why, then, is technology still lacking?

The main reason is that technology alone does not drive growth, and relying on tech tools to fuel a digital transformation is dangerous. Having a "fit to purpose" technology stack becomes difficult when the purpose of technology changes every three to five years.

According to George Westerman, MIT Principal Research Scientist and Author, "Customer expectations are far exceeding what you can really do. That means a fundamental rethinking about what we do with technology in organizations." ⁵

For many companies, this may include investments in areas such as eCommerce, master data management (MDM), product information management (PIM), cloud, or CMS. However, enterprises must also make organizational changes that allow them to become data-driven and focus on enterprise key performance indicators (KPIs) and continuous improvement.

#2: Slow time to market

New product introductions are critically important, yet they can be perilous. According to a Harvard Business School study, an estimated 95 percent of consumer products fail. ⁶

Inefficiencies in the introduction of new products can seriously impact the bottom line. In many cases, no matter how innovative your product is, if you can't get it to market before the competition, the company can lose its competitive ground.

Successful product launches rely on two critical areas: The ability to respond to shifts in the market and speed of execution.

In order to improve speed-to-market, companies must be able to: stay on top of customer preferences; have an end-to-end view of product data; ensure seamless coordination between internal and external departments; and leverage insights to improve product release cadence.

#3: Data problems

High-quality data is fundamental to achieving digital transformation. Yet, it remains one of the biggest obstacles for many organizations.

EXPANSION DEPENDS DATA ISSUES

The cost of poor data can be staggering. According to the Harvard Business Review, bad data costs the U.S. \$3 trillion per year. ⁷

When it comes to data quality, our respondents rated Product and Customer data as the lowest data quality sets, with Location, Vendor, and Employee just slightly higher. Given that product and customer data require the most third-party participation, it's not surprising that high-quality data in these areas.

For many organizations, it's a double-edged sword. Digital expansion is hindered by poor data, which only gets worse as they attempt to pursue expansion.

Data Quality Ratings



For companies to succeed, they must think of themselves as “data brokers” versus just a retailer, distributor, or manufacturer of products. This shift in perspective helps evolve the paradigm of what it means to sell products. Successful enterprises are those with a data-driven mindset focused on presenting content in compelling ways to customers – rather than just the transactions involved with selling products.

The benefits of high-quality data are easy to prove, but getting there requires discipline and investment – and that’s where the right tactics and technology comes in.

Digital Transformation Tactics & Technology

According to a CIO article, when it comes to digital transformation, companies must, “Gain your right to win at disruption by building, acquiring, and maintaining combinations of people, knowledge, IT, tools, structures, and processes that suit the corporate culture.”⁸

To dive deeper, we asked our customers to identify their most important tactics for digital transformation. *Personalization* and *Understanding Your Customers* ranked the highest, each scoring 78 percent, followed by *The Right Technology* at 64 percent.

Understanding Your Customers

This is a critical area to define – not once, but continuously through ongoing Persona Mapping. It’s not enough for a company to learn about customers via their website alone. They must understand all customer channels and develop strategies for each of those channels (marketplaces, social media, etc.).

In addition to understanding the behavior, attributes, and preferences of customers, it can also be helpful to include vendors, distributors, and even employees in this process. They often have critical insight into customer expectations and experience. Companies must listen to the feedback they receive from third parties and employees, and then be able to incorporate that as quickly as possible into improving products and processes.

Improving Personalization

Many companies still think of customers in the old way, as segments. Personalization in today’s competitive environment requires capturing not just one aspect of the customer, but continuously gathering data around many attributes, relationships, preferences, sentiments, and behaviors. Companies need a place to store this data, as well as analytics to extract insights that can be leveraged to drive real-time, individualized interaction and offers.

When companies get this right, customers respond with wallet share and loyalty. When companies get this wrong, the risks are high – harmed brand reputation, lost revenue, and diminished loyalty.

Unfortunately, digital transformation initiatives continue to suffer the impacts of poor customer understanding, yet too few are prioritizing the necessary investments. This widening gap links to the other key element – the right technology.

Investing in the Right Technology

When it comes to the primary technologies to support digital transformation, survey respondents indicated *Loyalty Programs (85%)*, *Personalization (77%)*, and *Email Automation Platforms (53%)* top the list.

The “right technology” is no longer monolithic – it’s modular and adaptable. The answer lies in the creation of key performance metrics “across the stack” to allow for continuous improvement.

These technologies are far from new, but the way that companies approach the use of these tools is shifting.

To develop strong loyalty programs, deliver personalized offerings, or automate content delivery, companies must first understand their customers – and that requires clean, consistent, and insightful data.

We’ll explore how companies can roadmap, select, and implement the right technology as we dive into four best practices for digital transformation success.

4 Best Practices for Digital Transformation

From establishing effective data to rallying your team around digital initiatives, the following best practices can serve as a roadmap to kickstarting a successful digital transformation for your enterprise.

Tip #1: Establish a Single Source of Data Truth

Many organizations are still relying on the shaky foundation of Excel to manage their data. Survey results show that 36 percent of respondents still *rely on Excel* to manage their

data, with 78 percent reporting they *manage up to 25 percent of their organization's entire data*.

Excel is a universal tool that many users are comfortable with, which helps explain why so many companies still use spreadsheets as a starting point for data management.

However, Excel is not robust enough to serve as a product or customer data master. In fact, spreadsheets are often the main culprit of data silos and time-consuming processes, i.e., the need to constantly update different versions and manually standardize data for various purposes and systems. In a world where the pace of change is rapid, the need for a central source of trusted data is evident. Digital transformation cannot happen without it.

The same organizations that struggle with slow speed-to-market, poor data quality, and a lack of customer understanding can make extremely strong cases for MDM and PIM.

MDM is a Crucial Digital Transformation Enabler

MDM - with its ability to help organizations harness the power of their data - is a core component and key enabler for digital transformation. By bringing together disparate data into a central data hub, companies can:

- Deeply understand their customers,
- Make intelligent connections between product, customer, location, assets, etc.,
- Deliver individualized offers,
- Engage in compelling ways with customers,
- Interact efficiently with partners and across their business ecosystem,
- Scale product assortments with ease, and
- Keep up with the velocity of market changes.

When an organization can operate as one company with a single data truth, it can

transform data into a competitive asset and advance its digital transformation goals.

Barriers to MDM Adoption

Although MDM is the most important component in a modular technology stack, many companies are lagging behind in adoption. The survey results show that **57 percent of organizations do not have PIM/MDM systems in place**, with only **33 percent planning to invest in one in the future**.

What are the barriers to adoption? Many organizations are hesitant to invest in MDM due to perceived high costs that have historically been associated with complex systems. However, the market is shifting.

According to the 2020 Gartner Magic Quadrant for MDM Solutions, "The MDM market is showing a significant move from high cost and complexity to license flexibility and implementation agility."⁹

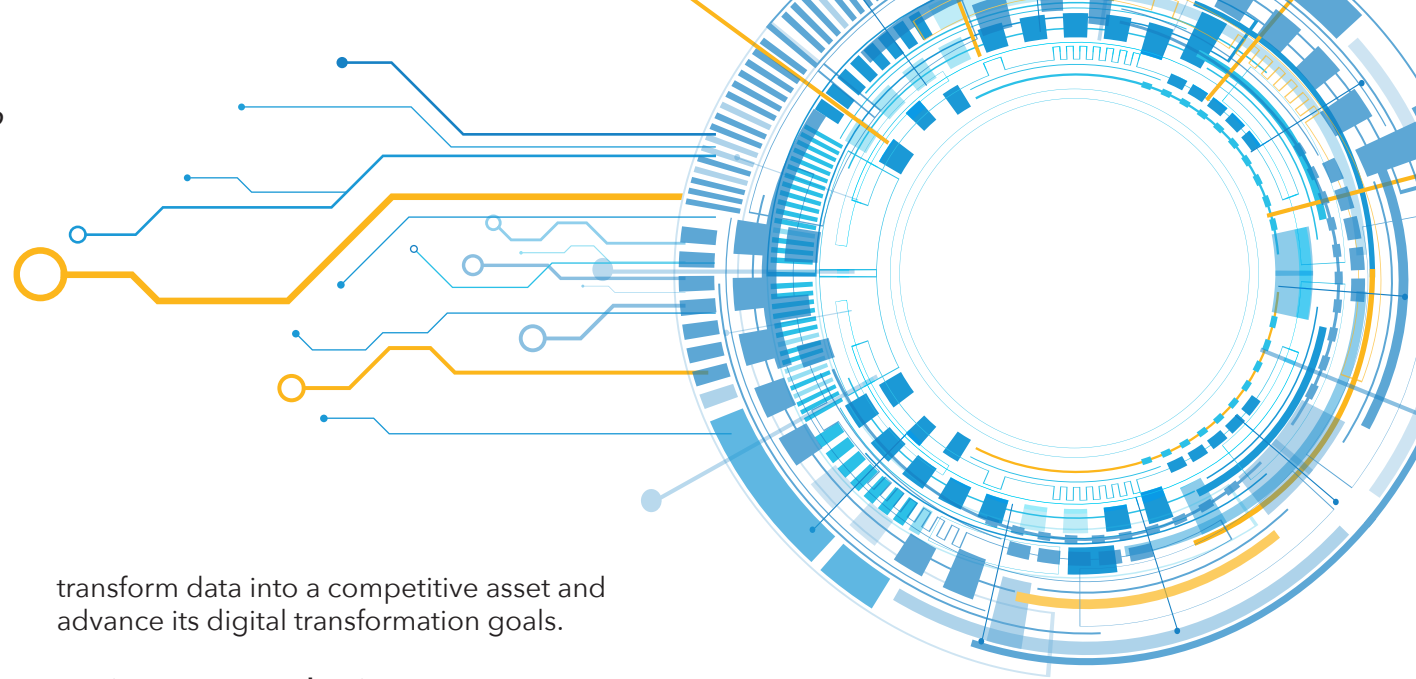
The push for digital transformation is a primary driver of this shift. MDM platforms are not as obtrusive as they have been in the past, trading complexity and high-cost for cloud deployment and monthly licensing options.

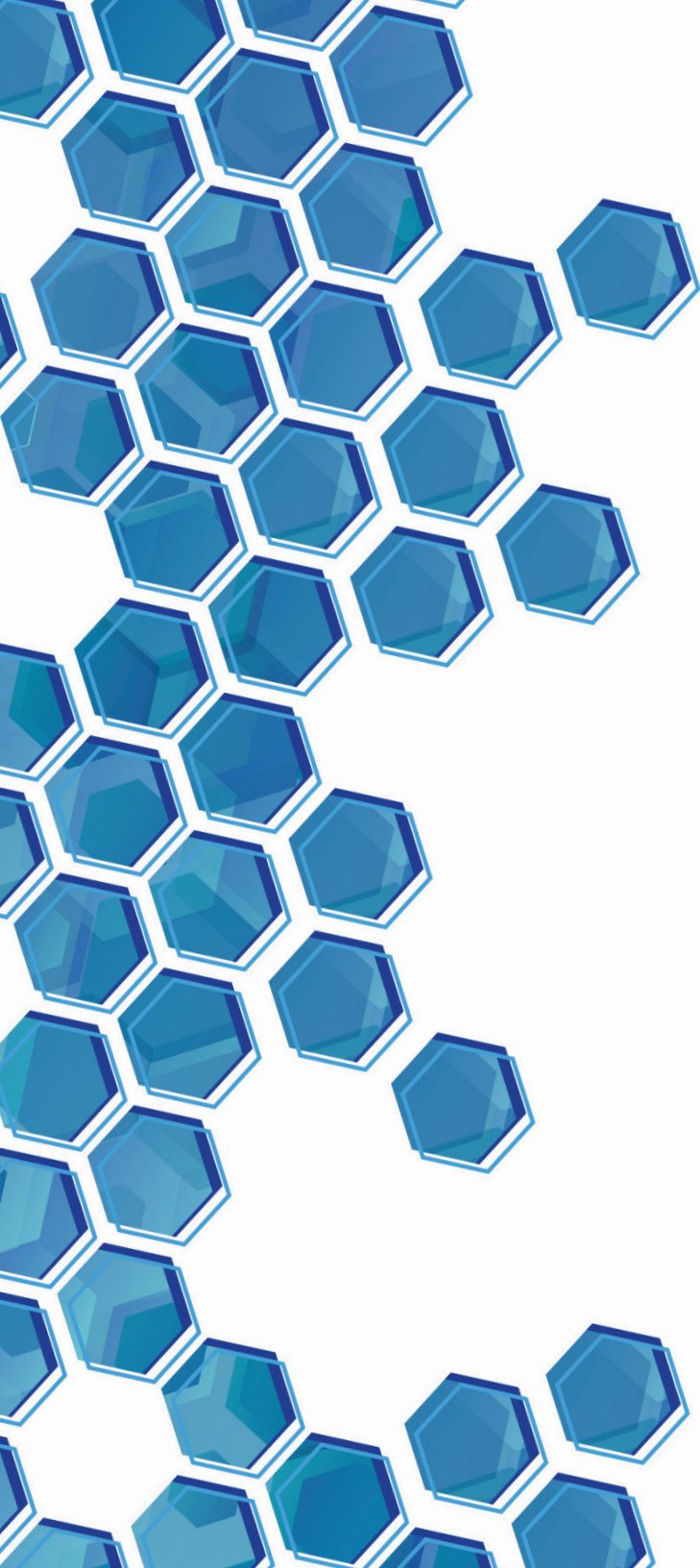
MDM technology is also getting more agile and easier to use. There are many options for companies to consider, which can make it more difficult to evaluate the best fit - both for immediate requirements and future growth.

Tip #2: Get Key Stakeholders Involved

When it comes to moving the needle on digital transformation, securing support from champions and participants across the organization is a crucial step. The following roles ranked highest by survey respondents.

Respondents view most roles as holding equal weight in driving a digital transformation. CIO, Digital Team, IT and Marketing all rated equally (4/10). The CEO came in a mark above at 5/10.





C-Suite: Visionaries

Whether the CEO, CIO, or Chief Data Officer (CDO), the c-suite stakeholders are the visionaries and driving forces behind an overall digital transformation program. In fact, most digital transformation initiatives will fail if not driven from the top.

Data management and eCommerce initiatives are two sides of the same coin, and they must happen hand-in-hand. CIOs and CEOs look at these areas from a big-picture standpoint, and define what the end-results should be.

The KPIs may vary, but ultimately it boils down to digital growth, including online revenue, online conversions, percentage of market share, digital footprint, customer retention/churn rates, etc.

Digital Team: MarTech Mavens

Often referred to as the MarTech team (marketing technology), the Digital Team is comprised of marketing commerce individuals who can identify how to leverage technology best practices in eCommerce and data to support marketing and sales. Whereas the c-suite forms the vision, the Digital Team comes up with the actual strategy for connecting the business drivers to the technical requirements.

Focusing on people, processes, and technology, the Digital Team will uncover specific use cases, or pain-point narratives, and then align those issues with specific solutions.

By combing marketing and technology perspectives, the Digital Team can measure how well they are executing the company's vision with KPIs including time-to-market, efficiency, number of products available for sale, number of active customers, average revenue per product, average order size, order

frequency, cost of product returns, cost of SLA issues, etc.

IT: Technical Validation

While the Digital Team establishes what technology features are needed, the IT team validates the technical viability of the technology and its capabilities.

IT may act as realists to ensure the chosen path won't affect the company negatively from a technical standpoint, and make suggestions for overcoming any roadblocks.

For example, if a company is moving from on-premise to cloud, the IT team might evaluate if the service has enough bandwidth to support their needs or if the security is reliable. The KPIs for the IT team include areas like speed, uptime/downtime, connectivity, etc.

Marketing: Bringing the Vision to Life

Digital transformation is all about how to expand the digital footprint across channels, and marketing plays a key role in protecting and promoting the brand during that process. For example, if the company decides to sell via a mobile app or social channel, marketing will help ensure the content is compelling and consistent. The technology must support their initiatives from a feature and capability standpoint.

To measure success, marketing will look at KPIs including marketing-influenced sales, transaction value and quantity, spending efficiency, number of paid touchpoints, share of voice, conversion rates, customer lifetime value, repeat buyers, etc.

How to Unite Your Stakeholders

It's clear that each department within the company has an important role to play in

digital transformation. As companies pool together their data and commerce experts, they should consider adopting the following best practices:

Develop a Committee: A first step should include forming a committee, or Center of Excellence, that will guide the process. The committee will work to define use cases, identify the sources of data and assets, and create a data quality framework. This group may include representatives from different departments, lines of business, and/or geographical areas.

Stay Focused on the Business: Often, people get blinded by exciting technology tools, but they don't really know how to implement or use the tools effectively for their business. Teams must recognize the difference between business capacity and software capabilities. Remember that technology alone never solves a problem. A business must be capable and ready for transformation.

Take a Journey Approach: Digital transformation isn't a one-time 'fix it and forget it' project - it's a journey. Each project and organization vary in processes and approaches, but the key is to be well-equipped when sharing the digital transformation plans with different key stakeholders, be aware of different expectations, and ensure that digital efforts continue to evolve and meet the company's long-term goals.

Tip #3: Define Governance Upfront

As companies work to achieve digital transformation, the data they share about products, customers, or their own business often becomes harder to track and protect. Thankfully, companies are increasingly

"The European Union's General Data Protection Regulation (GDPR), which comes with potentially high fines for noncompliance, is forcing chief information security officers (CISOs) at organizations of all sizes to rethink how they manage data privacy. Yet many still don't have a data security governance strategy." ¹⁰

- Gartner

embracing data governance: **69 percent of survey respondents said they have a data governance policy in place.**

However, there is work to be done: **Half of survey respondents admitted that people within the organization don't clearly understand their role within the data governance policy.**

This is concerning, given the substantial role data governance plays in supporting successful digital initiatives. For example, the GDPR mandate makes data governance an urgent undertaking for commerce companies in order to stay compliant with how they use consumer data.

To support all of the moving parts of a digital transformation, companies must tackle data governance with a holistic approach of people, processes, and tools.

Essential Elements of Data Governance

MDM with Data Governance: MDM with

capabilities for data governance support helps companies define levels of data quality that must be achieved, plan for the implementation of those policies, and monitor the success of each policy. By creating standardized processes for addressing data issues, enterprises can drastically improve the transparency of data ownership and responsibilities, and more easily achieve regulatory compliance with consistent and trusted data.

Data Governance Council: A data governance council should be formed to help set data standards and ensure they are enforced throughout every stage. It's important to bring the right data governance stakeholders into the process so that every relevant department weighs in and has their needs represented. This collaboration ensures better buy-in across the enterprise, and therefore, a deeper understanding of developed policies.

Data Stewardship: Data stewards are crucial to help organizations guide data-related issues, improve documentation, remediate or assign issues, and more. They hold much of the accountability for driving the success of data governance efforts. To accomplish these tasks, they need training, support, and access to easy-to-use technical tools, including those provided through an MDM solution.

Stamina: Individuals and teams involved in data governance can become frustrated and overwhelmed. Technology, like MDM, can help make the job more efficient and effective, and provide the confidence they need to stay the course. Like digital transformation, data governance is also a journey. As a company continues to mature its data governance policies and procedures, it will be better

equipped to quickly adapt to change while maintaining high-quality data.

Tip #4: Engage the Right Support

According to PwC Digital Consulting Leader Tom Puthiyamadam, the top impediment to winning digital disruption is a lack of talent. In fact, he predicts the high demand for talent will outstrip supply over the next several years.¹¹

Indeed, the breadth of digital transformation often leaves blind spots and gaps – particularly around lining up technology with business goals in a way that is most efficient and effective. Keeping up with the pace of change requires an end-to-end approach. This can feel overwhelming – but it doesn't have to be.

To overcome barriers in talent and technology, companies can seek the help of a Commerce Services Provider (CSP) to help navigate through digital transformation in a way that's digestible.

A seasoned team of commerce experts can help address issues like:

- **What business outcomes do we want to achieve for our customers?** A CSP with MDM, Digital, and Commerce expertise can help define your digital strategy with collaborative discovery sessions, business model analysis, competitive benchmarking, and beyond.
- **What type of technology do I need?** Organizations often don't know which technology they really require – eCommerce, PIM, MDM, or CMS? A CSP can provide niche-level expertise to recommend the right solutions for an organization's unique situation and needs.
- **Which platform is right for our business?** Finding the right software platform is not about what vendor is "best," but which platform is best suited for your enterprise. The data and commerce technology markets have seen an influx in software and vendor options. While this is good news in terms of cost and choice, it can be difficult to make a selection. An external perspective can completely transform the execution of a company's growth strategies – especially one that's based on lessons learned from a variety of implementations.
- **How can we get the fastest time-to-value?** When it comes to MDM and PIM, choosing the right platform is just half the battle – companies also need to get the overall strategy and implementation right. It's important to find the right consultative partner that will collaborate closely on the end-to-end roadmap to get the fastest time-to-value.
- **How can we break down investment barriers?** Many organizations are hesitant to invest in MDM due to the high costs and perceived complexity – but not all MDM platforms require substantial investment upfront. A CSP can help companies establish cloud-based options that bundle the required features into an affordable monthly payment.
- **How do we prove ROI?** Aligning concrete value is not always easy with MDM. Unlike eCommerce, which generally translates to revenue and more customers, MDM can have less obvious and clear value propositions. A CSP can help digital teams not only get the most value out of their MDM implementation, but provide ROI analysis to prove the worth of investment to business leaders.

"Your opportunities to rethink your business have never been so great. The challenge facing you, no matter how mature your enterprise, is the same challenge facing any upstart: To create a new business model, value proposition, and system of customer-facing capabilities, positioning your enterprise for long-term success."¹²
- Tom Puthiyamadam

Conclusion

Over the past two decades, our society has ushered in social media, AI and Machine Learning, smartphones, and many other disrupters that have ignited a fire under the digital revolution. It's happened quickly, leaving traditional companies wondering where to invest, what organizational changes to make, and how to strategize for the years ahead.

The ebb and flow of customer expectations and market changes will always be hard to predict. The goal of forward-thinking enterprises is to build a foundation that can quickly respond and adapt, no matter where the digital wave takes us next.

At Pivotree, we employ a consultative approach to help companies modify and stretch existing resources, implement new systems, and foster ongoing innovation to reach new heights and grow. There is no magic solution in-a-box for digital transformation – just clear strategy, astute technology, and an uncommon will to relentlessly adapt.

About Pivotree

Pivotree helps companies maximize revenue for their Master Data Management (MDM) investments with a wide range of Managed and Professional Services, including live 24x7 support, white-glove service, configuration management support, integration capabilities, and advanced monitoring. With 360° support, you won't miss a thing.

We are the only end-to-end service provider, supporting clients from strategy, platform selection, deployment, and hosting through to ongoing support. You won't get that full breadth of offering anywhere else.

Pivotree serves as the trusted partner to over 200 market-leading brands and some of the world's largest B2C and B2B companies, including many Fortune 1000. The breadth of our experience reaches far and wide, covering the entire supply chain - all the way from manufacturers and distributor to retailers.

To learn more about the 200+ leading brands we've helped by optimizing their commerce experiences, visit our website www.pivotree.com.



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