

The Forrester WaveTM: Identity Verification Solutions, Q4 2022

The 12 Providers That Matter Most And How They
Stack Up

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By Andras Cser with Merritt Maxim, Sara Sjoblom, Kara Hartig

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Summary

In our 22-criterion evaluation of identity verification (IDV) solution providers, we identified the 12 most significant ones — DocuSign, GBG, HID Global, IDnow, LexisNexis Risk Solutions, Mitek, Onfido, Pipl, Prove, Socure, Sumsb, and TransUnion — and researched, analyzed, and scored them. This report shows how each provider measures up and helps security and risk as well as digital business professionals select the right one for their needs.

Additional resources are available in the [online version](#) of this report.

Support For Low Customer Friction IDV Methods And Configurability Matter

With the rise of identity theft across all industries, digital IDV is becoming more central to the customer digital journey. Firms should only issue login credentials to legitimate users after the successful completion of an IDV process. The increased focus on optimizing customer experience and reducing digital friction is causing organizations to migrate away from knowledge-based IDV (credit file headers) to IDV methods that rely on physical-ID-document verification and are phone-number-reputation-based. Firms that are deploying IDV are demanding the ability for administrators to configure IDV processes.

As a result of these trends, IDV customers should look for providers that:

- **Provide phone-number-based verification for low-friction, implicit IDV.**

Understanding whether a customer's phone number is a landline, prepaid or postpaid mobile number, newly ported or SIM-swapped number, or a caller indicator spoofed in the contact center plays a crucial role in detecting identity theft and identifying fraudulent enrollments. (Fraudsters often use the same burner phone numbers for fraudulent registrations.)

- **Allow for email-address-based verification that is inexpensive and unobtrusive.**

The majority of online registrations (at least in North America and Europe) requires that the customer provide a valid email address to complete the registration process. How long a user has had an email address on the internet (social media, shopping sites, etc.) is inversely proportional to the risk level of that email address (the longer the email address has been around, the lower the risk is). Email-address composition in context is also important: Fraudsters often create burner email addresses by incrementing a number in the username like littledaisy12345@gmail.com, littledaisy12346@gmail, etc.

- **Detect known fraudsters and nonhuman activity with behavioral biometrics.**

How users fill out an application form is characteristic of their intent. Fraudsters are trying to be efficient: With intimate knowledge of registration forms, they maximize their productivity by using copy/paste from Excel sheets, use the tab key to move between fields, and stop to think about trivial personal information, such as date of birth or gender. Robotic activity — despite fraudsters' attempts to make it look like human activity — also exhibits traits that behavioral biometrics can identify.

- **Offer flexible configuration to the end user organization and reduce time to value.** Traditionally, IDV solutions have offered no or minimal ability in the administrative UI to modify IDV policies (such as supported countries or phone

numbers and the ability to select sources of public records for IDV). Leaders in this Forrester Wave offer an increasing level of configurability and customizability in the IDV process's data sources and workflow.

Evaluation Summary

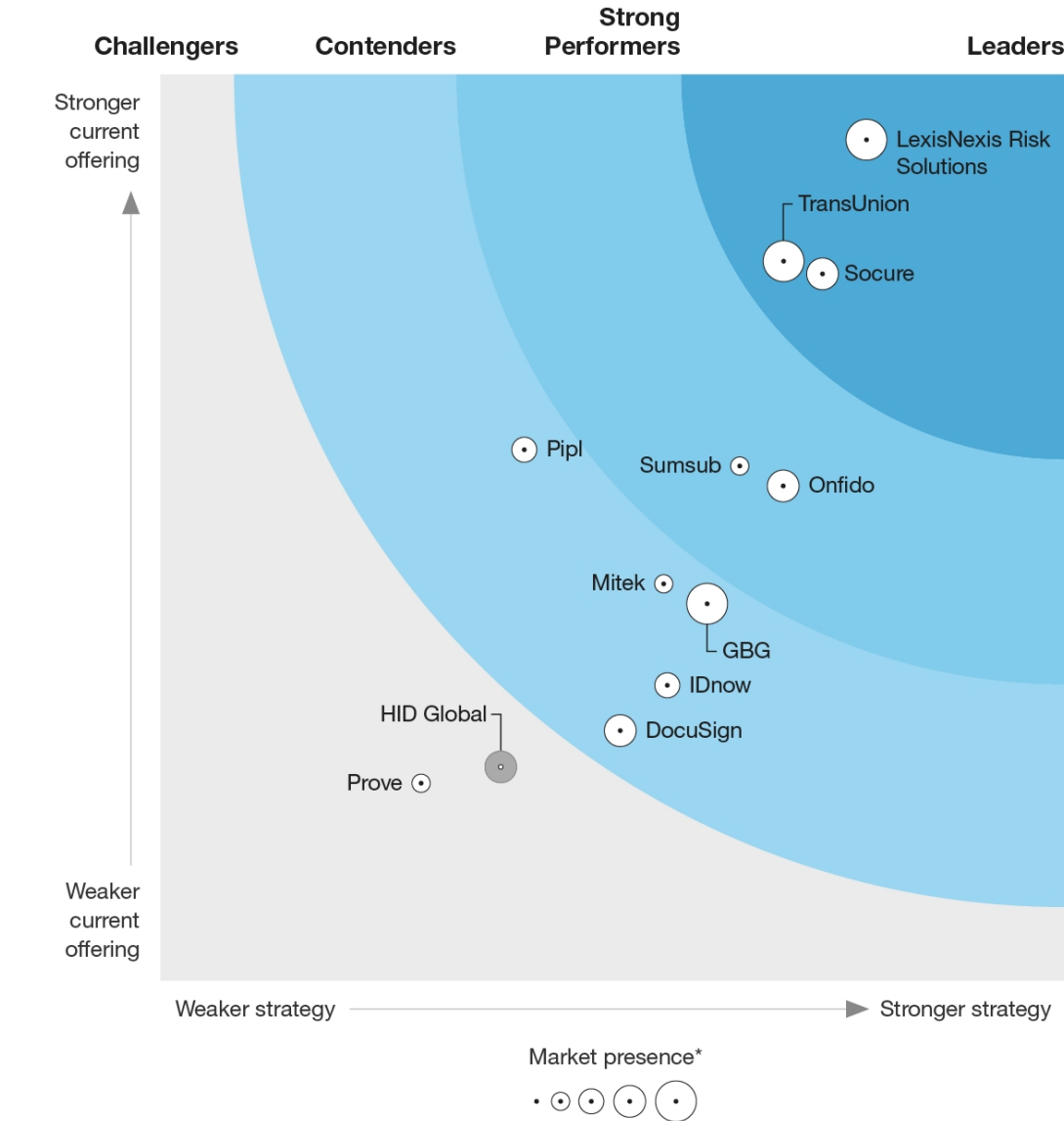
The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market; it doesn't represent the entire vendor landscape. You'll find more information about this market in [The Identity Verification \(IDV\) Landscape, Q3 2022](#).

We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figures 1 and 2). Click the link at the beginning of this report on Forrester.com to download the tool.

Figure 1

Forrester Wave™: Identity Verification Solutions, Q4 2022

THE FORRESTER WAVE™
Identity Verification Solutions
Q4 2022



*A gray bubble or open dot indicates a nonparticipating vendor.

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Figure 2

Forrester Wave™: Identity Verification Solutions Scorecard, Q4 2022

Current offering	Forrester's weighting	DocuSign	GBG	HID Global*	IDnow	LexisNexis Risk Solutions	Mitek
Admin user management	10%	3.00	1.00	1.00	1.00	5.00	3.00
Public record basis	9%	3.00	3.00	0.00	1.00	5.00	5.00
Physical ID doc basis	9%	3.00	3.00	3.00	1.00	1.00	3.00
Phone number basis	9%	0.00	5.00	0.00	0.00	5.00	0.00
Email address basis	9%	0.00	0.00	0.00	0.00	5.00	0.00
Address verification	9%	1.00	5.00	3.00	3.00	5.00	1.00
Data quality and link analysis	9%	1.00	1.00	1.00	1.00	5.00	3.00
Behavioral biometrics	9%	0.00	0.00	0.00	0.00	5.00	0.00
Case management	9%	0.00	1.00	1.00	5.00	5.00	5.00
Reporting and dashboarding	9%	3.00	1.00	1.00	5.00	5.00	1.00
Scale	9%	1.00	3.00	3.00	1.00	5.00	3.00

All scores are based on a scale of 0 (weak) to 5 (strong).

*Indicates a nonparticipating vendor

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		Forrester's weighting	DocuSign	GBG	HID Global*	IDnow	LexisNexis Risk Solutions	Mitek
Strategy		50%	2.54	3.02	1.88	2.80	3.90	2.78
Product vision		12%	1.00	5.00	1.00	5.00	5.00	3.00
Execution roadmap		11%	1.00	3.00	3.00	1.00	5.00	3.00
Market approach		11%	5.00	3.00	3.00	1.00	3.00	3.00
Planned enhancements		11%	1.00	1.00	1.00	3.00	5.00	3.00
Innovation roadmap		11%	1.00	3.00	1.00	5.00	1.00	3.00
Supporting products and services		11%	5.00	3.00	5.00	3.00	5.00	1.00
Partner ecosystem		11%	5.00	5.00	1.00	3.00	3.00	1.00
Delivery model		11%	1.00	1.00	1.00	3.00	5.00	5.00
Commercial model		11%	3.00	3.00	1.00	1.00	3.00	3.00
Market presence		0%	3.50	5.00	3.50	2.50	5.00	2.00
IDV revenue		50%	3.00	5.00	4.00	3.00	5.00	2.00
Number of live installations		50%	4.00	5.00	3.00	2.00	5.00	2.00

All scores are based on a scale of 0 (weak) to 5 (strong).

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Current offering	Forrester's weighting	Onfido	Pipl	Prove	Socure	Sumsb	TransUnion
	50%	2.73	2.93	1.09	3.90	2.84	3.97
Admin user management	10%	3.00	5.00	1.00	3.00	5.00	1.00
Public record basis	9%	1.00	5.00	0.00	1.00	1.00	5.00
Physical ID doc basis	9%	5.00	0.00	0.00	5.00	3.00	3.00
Phone number basis	9%	3.00	5.00	0.00	3.00	3.00	5.00
Email address basis	9%	0.00	5.00	0.00	5.00	3.00	5.00
Address verification	9%	3.00	1.00	1.00	5.00	3.00	5.00
Data quality and link analysis	9%	3.00	5.00	0.00	5.00	3.00	5.00
Behavioral biometrics	9%	3.00	0.00	5.00	5.00	3.00	5.00
Case management	9%	3.00	0.00	0.00	5.00	3.00	0.00
Reporting and dashboarding	9%	5.00	3.00	0.00	1.00	3.00	5.00
Scale	9%	1.00	3.00	5.00	5.00	1.00	5.00

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	Forrester's weighting	Onfido	Pipl	Prove	Socure	Sumsb	TransUnion
Strategy	50%	3.44	2.01	1.44	3.66	3.20	3.44
Product vision	12%	3.00	3.00	1.00	3.00	1.00	3.00
Execution roadmap	11%	5.00	1.00	3.00	3.00	3.00	5.00
Market approach	11%	5.00	1.00	1.00	3.00	5.00	3.00
Planned enhancements	11%	3.00	1.00	1.00	5.00	3.00	5.00
Innovation roadmap	11%	5.00	5.00	3.00	5.00	3.00	1.00
Supporting products and services	11%	3.00	1.00	1.00	5.00	1.00	5.00
Partner ecosystem	11%	1.00	0.00	1.00	5.00	3.00	5.00
Delivery model	11%	3.00	1.00	1.00	3.00	5.00	3.00
Commercial model	11%	3.00	5.00	1.00	1.00	5.00	1.00
Market presence	0%	3.50	2.50	1.50	3.50	2.00	5.00
IDV revenue	50%	4.00	1.00	2.00	4.00	1.00	5.00
Number of live installations	50%	3.00	4.00	1.00	3.00	3.00	5.00

All scores are based on a scale of 0 (weak) to 5 (strong).

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Vendor Offerings

Forrester included 12 vendors in this assessment: DocuSign, GBG, HID Global, IDnow, LexisNexis Risk Solutions, Mitek, Onfido, Pipl, Prove, Socure, Sumsb, and TransUnion (see Figure 3).

Figure 3
Evaluated Vendors And Product Information

Vendor	Product evaluated
DocuSign	DocuSign ID Verification
GBG	GBG ID3global and IDscan
HID Global	HID Identity Verification Solution
IDnow	IDnow Autolent
LexisNexis Risk Solutions	LexisNexis Dynamic Decision Platform
Mitek	Mitek Verified Identity Platform (MiVIP)
Onfido	Onfido Real Identity Platform
Pipl	Pipl Trust Solution
Prove	Prove Pre-Fill and Prove Identity
Socure	Socure ID+
Sumsb	Sumsb
TransUnion	TransUnion TruValidate

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Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

Leaders

- **LexisNexis Risk Solutions offers a comprehensive IDV solution.** LexisNexis Risk Solutions has been working on linking physical (such as public record and physical ID document) and digital (like device ID and behavioral biometrics) IDV sources and methods. In its strategy, the vendor has a forward-looking product vision and execution roadmap signaled by acquisitions such as Emailage, IDAnalytics, and Threatmetrix as well as organic development. However, the innovation roadmap is rather weak, the partner ecosystem is proportionally smaller than that of other similar-sized vendors, and while pricing is modular, the vendor’s commercial IDV pricing for the nonpublic sector is not published. The vendor plans to: 1) improve session-based continuous authentication, 2) launch fraud intelligence scores and

attributes incorporating intellectual property from the IDAnalytics acquisition, and 3) enhance country-specific coverage and accuracy of physical-document verification.

In its current offering, the solution provides good admin user management and public-record- and knowledge-based authentication. Verifications of phone number, email address, and physical address are also ahead of other vendors in this evaluation. The vendor has improved internal data quality and has very usable case management for investigation. However, the solution lags in physical-document-based IDV: Importing hot lists is difficult; RFID, OCR, and holographic-document-image capture is not configurable; and neither is false-positive- and negative-accept-rate tuning. The solution is a good fit for companies looking for an all-around IDV solution with decent geographical coverage.

- **Socure uses ML and AI to link transactions, identities, and modalities.** Originally a vendor in the social-media-footprint-based IDV space, Socure changed its direction to connect identities in its proprietary link graph using ML and AI technologies. In its strategy, the vendor showed leading planned enhancements, and spend on IDV development as a percentage of IDV revenues (innovation roadmap) is ahead of others evaluated. The vendor also has high staffing levels for IDV product development, support, and professional services, and its partner ecosystem is large. However, the commercial model lags competitors (the pricelist is not published and is more complex than that of competitors). The vendor's roadmap includes: 1) enhancing and deploying device, behavioral, and geolocation data across products; 2) using consortium data to stop pervasive first-party/friendly fraud attacks; and 3) sharing information proactively on evolving fraud attacks in its consortium network.

In its current offering, the solution provides physical-ID-document-based IDV as well as email-address and physical-address verification. Data quality improvements are outstanding (thanks to ML and AI), and behavioral biometrics are strong. Case management as well as the number of total annual IDV transactions are also higher than others evaluated. However, the solution lags other vendors in public-document-based IDV, barely providing any document-based, exposed IDV service. Reporting and dashboarding are weak, and phone-number-based IDV is on par with others evaluated. The solution is a good fit for companies looking to operationalize identity risk scoring based on identities' position and links in identity graphs.

- **TransUnion provides leading phone-number and email verification.** TransUnion acquired Neustar (a prominent vendor in phone-number-based IDV) in 2021 for its technology and OneID network. The main investment themes of the vendor have

been IDV orchestration and use of more data sources for better predictive risk analytics. In its strategy, the vendor's execution roadmap is convincing, with planned enhancements ahead of others evaluated. The vendor has an adequate number of development, support, and professional services staff to support large deployments augmented by a large ecosystem of system integration partners. The vendor's market approach is on par with others evaluated, and spend on IDV innovation as a percentage of IDV is lower than average. The vendor's pricing model is not immediately transparent and not available publicly. The vendor's roadmap includes: 1) investments in its identity and risk network including linking devices and people on a global analytics platform, 2) new risk scores and attributes using the OneID platform, and 3) dynamic orchestration and a case management platform.

In its current offering, the solution offers great public-record-based IDV (including credit header file), coupled with powerful phone-number, email-address, and physical-address verification. Data quality checks are built in, and reporting and dashboarding are also strong. However, the solution has no real case management (complete with case routing and queue definitions) for investigation, and admin user management lags others evaluated. Physical-document verification is on par with others evaluated. The solution is a good fit for firms looking for broad international coverage and complex IDV use cases.

Strong Performers

- **Onfido offers leading physical-document IDV but lacks email-address verification.** Onfido launched the Real Identity Platform in May 2022 and improved the accuracy, speed, and automation of its biometrics-based document IDV platform. In its strategy, the vendor boasts a better-than-average execution roadmap and market approach. Spend on IDV innovation as a proportion of IDV revenues is ahead of others evaluated. However, the size of the implementation partner ecosystem lags other vendors, and its product vision and planned enhancements are just on par. The vendor's roadmap includes: 1) expansion to more countries and partners for physical-ID-document verification (PIDV); 2) improved usability for customers, including the rollout of NFC-based doc support; and 3) improved automation for PIDV.

In its current offering, the vendor offers excellent PIDV and very good configurable reporting and dashboards. However, public-records-based IDV and physical-address verification lag others evaluated, and the vendor does not offer public-records-based email-address verification. Scale (total annual IDV transactions performed) is also smaller than average among competitors. The solution is a

good fit for firms requiring automated PIDV with strong European coverage that also want to expand into other IDV modalities.

- **Sumsub provides multimethod IDV but lacks credit-file-record-based IDV.**

Sumsub is investing in in-house PIDV technologies that use OCR, liveness, and matching faces to document photos. The vendor plans to improve transaction monitoring. In its strategy, the vendor has a robust market approach and delivery model, and in terms of its commercial model, the vendor's IDV pricing is clear and publicly available. However, the product vision and level of development, support, and professional services staffing lag others evaluated. The vendor's roadmap includes: 1) more data sources for verifying people as a method to replace/augment PIDV, 2) full lifecycle management (such as reauthentication and transaction monitoring), and 3) Web 3.0-compliant services.

In its current offering, the vendor delivers an on-par IDV solution. With the exception of public-record-based IDV, it is on par with other vendors in physical-ID-, phone-number-, email-address-, and physical-address-based IDV; data quality checks; and behavioral biometrics. Admin user management is very good. However, the solution offers minimal public-records-based IDV, and scale of deployment is smaller than that of other vendors. The product is a great fit for firms looking for a vendor that fully controls its PIDV technology and provides all core capabilities using its own intellectual property.

Contenders

- **GBG offers solid physical-address verification but lags in reporting and dashboarding.** GBG recently acquired Acuant mainly for its physical-document verification capabilities. The vendor defines global-level strategy with regional execution. In its strategy, the vendor has a better-than-average product vision and robust implementation partnership ecosystem with a demonstrated track record. However, planned enhancements and the delivery model lag others evaluated. The vendor's roadmap includes: 1) migration of its solution to Azure infrastructure as a service, 2) database modernization, and 3) identity and access management integrations with technology partners such as Ping Identity.

In its current offering, the vendor offers strong phone-number and physical-address verification capabilities. Admin user management, data quality improvements, visual link analysis of entities, case management, and reporting and dashboarding lag others evaluated. Email-address verification and behavioral biometrics are largely missing. The solution is a good fit for organizations requiring global IDV coverage, especially in APAC.

- **Mitek offers robust public-records-based IDV but lags in phone-number**

verification. Mitek is focusing on frictionless IDV by developing SDKs to be built into mobile applications. The vendor has also improved the accuracy of its risk scoring of PIDV. In its strategy, the vendor's delivery model is strong: It supports customer journeys in IDV and subsequent authentication that are easy to customize and tailor to varying customer needs in terms of speed and accuracy. However, combined staffing levels in development, support, and professional services are behind competitors, and the vendor's implementation partner ecosystem is weaker than average. The vendor's roadmap includes: 1) support for passwordless user authentication, 2) improvements to face recognition using hot lists, and 3) improved document liveness checks.

In its current offering, the public-record-based IDV features are ahead of others evaluated. Case management is particularly strong: Its administration allows for flexible queue definitions and automatic or manual case assignment and shows risk-score-reason codes on case screens. However, phone-number and email-address verification as well as behavioral biometrics are not supported today, and reporting and dashboarding are behind competitors. The solution is a good fit for organizations requiring full control of IDV in their mobile applications and a fully functional case management system for investigators.

- **Pipl sports strong public-records-based IDV but lacks physical-document**

verification. Pipl provides vertical-agnostic IDV solutions with adaptive risk scoring that enables a frictionless experience for good, trusted users. After focusing initially on the North American market, the vendor is expanding globally. In its strategy, the vendor displays strength in IDV R&D spending as a proportion of IDV revenues. Its pricelist is easy to understand and is publicly available. The vendor also offers ROI analysis to its clients. However, the execution roadmap, market approach, and planned enhancements are unconvincing. The vendor's partnership model is currently being revamped, meaning it has no implementation partners today, and its combined development, support, and professional services staff levels lag others evaluated. The vendor's roadmap includes improving its decision engine, investing in behavioral biometrics, and making SDK integration easier.

In its current offering, Pipl provides a very functional admin user management model and interface, and public-records-based IDV is strong. Phone-number and email-address reputation checks and improvement of data quality of its proprietary databases are ahead of others evaluated. However, the solution currently lacks behavioral biometrics (in planning) and provides only rudimentary physical-address verification. PIDV is also lacking. The solution is a good fit for organizations looking for fast self-service public-records-based IDV deployment.

- **IDnow spends large on innovation but lags in public-records-based IDV.** IDnow is focusing on the financial services, online gaming, travel, hospitality, and telco verticals. The solution's built-in AI/ML risk scoring has improved in the past few years. The vendor's Autoldent IDV solution received qualified electronic signature (QES) approval from the European anti-money-laundering (AML) regulator in 2021. In its strategy, the vendor has demonstrated a superior product vision and spends an above-average proportion of its IDV revenues on IDV R&D. However, the execution roadmap, market approach, and commercial model lag others evaluated. The vendor's roadmap includes: 1) use of additional fraud signals and algorithms (forgery-by-photocopied-document detection), 2) ANSSI (regulator) approval of automated PIDV in France for AML purposes, and 3) further investments in reporting and dashboarding on the My IDnow customer portal.

In its current offering, the vendor has very functional case management as well as reporting and dashboarding. However, admin user management, public records and PIDV, and data quality enhancements are behind competitors. The total number of annual IDV transactions is also behind others evaluated. The solution is a good fit for EU-based firms that need to comply with QES AML regimes.

- **DocuSign has on-par public-records-based IDV but lacks customer administration of IDV.** Supported by its legacy digital signature pedigree, DocuSign ventured into the IDV business successfully in 2022. The vendor considers its IDV solution to be a key augmentation to its Sign and Contract Lifecycle Management suite. In its strategy, the vendor has a strong market approach and an implementation partner ecosystem with a proven track record. The combined staffing levels for development, support, and professional services are above others evaluated. However, the product vision, execution roadmap, planned enhancements, spend on IDV R&D as a percentage of IDV revenues, and delivery model are behind. The vendor's roadmap includes QES support for the EU, increased accuracy and success rates of PIDV, and migration of the IDV codebase to a microservices framework.

In its current offering, the vendor has on-par public-record-based IDV, PIDV (with a range of countries and document types supported), and reporting and dashboarding. However, it lacks configuration for phone-number and email-address verification. Its physical-address verification and scale (the total number of annual verification transactions) are behind other vendors. The solution is a viable fit for firms looking to add IDV to their digital signature management workflows.

Challengers

- **HID Global focuses on IDV for financial services but lags in public-records-based IDV.** HID is a fully owned subsidiary of Assa Abloy, a company with its roots in hardware lock manufacturing and physical access management. The HID IDV solution focuses on PIDV as well as physical-address verification mainly for financial services firms. HID has an above-average combined development, support, and professional services staff as well as an on-par execution roadmap and market approach. However, the product vision, planned enhancements, estimated IDV R&D spend as a proportion of IDV revenues, delivery, and commercial model fall short of competitors. Forrester expects that the vendor's roadmap includes improvements in the NFC capture of documents and PIDV accuracy and expanded geographical coverage of electronic know-your-customer (KYC) processes.

In its current offering, the solution provides on-par PIDV and physical-address verification. However, it falls short of others evaluated in the areas of public-records-based IDV, phone-number and email-address verification, behavioral biometrics, and reporting and dashboarding. The solution is a good fit for financial services firms looking to incorporate physical-document and address verification into their global KYC processes. Scores are based on Forrester estimates. HID declined to participate in the full Forrester Wave evaluation process.

- **Prove offers robust behavioral biometrics but has below-par address verification.** Prove focuses its identity token services efforts on growing multiple verticals using its sales force with specialized vertical knowledge. In 2021, the vendor launched its Prove Pre-Fill solution (automatic completion of account-opening forms). In its strategy, the vendor has an on-par execution roadmap, and its spend on IDV R&D as a proportion of its IDV revenues is average. However, the product vision; market approach; planned enhancements; level of combined development, support, and professional services staffing; implementation partner ecosystem; delivery; and commercial model lag others evaluated. The vendor's roadmap includes automatic client onboarding and decisioning, addition of verified consumer financial information to allow customers to shop and qualify for products and services, and small-business verification.

In its current offering, the solution provides very good behavioral-biometrics-based IDV capabilities. Its solution scalability (the total number of annual IDV transactions processed by the solution) is above average. However, the solution lags in admin user management and physical-address verification. It offers no public-record-based IDV and case management. The solution is a valid choice for organizations looking to speed up the customer loan or account-opening application process by offering prefilled application forms.

Evaluation Overview

We evaluated vendors against 22 criteria, which we grouped into three high-level categories:

- **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include PIDV, behavioral biometrics, case management, and scale.
- **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated product vision, execution roadmap, market approach, planned enhancements, innovation roadmap, supporting products and services, partner ecosystem, delivery model, and commercial model.
- **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's IDV revenue, number of live installations, and breadth of offering.

Vendor Inclusion Criteria

Forrester included 12 vendors in the assessment: DocuSign, GBG, HID Global, IDnow, LexisNexis Risk Solutions, Mitek, Onfido, Pipl, Prove, Socure, Sumsu, and TransUnion. Each of these vendors has:

- Viable, actively maintained, and purpose-built IDV solution portfolios.
- Annual IDV product revenues exceeding \$30 million.
- Unaided mindshare of the vendor's IDV solution among end-user organizations.
- Unaided mindshare of the vendor's IDV solution among other IDV vendors.

Supplemental Material

Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows [The Forrester Wave™ Methodology Guide](#) to evaluate participating vendors.

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In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by September 30, 2022, and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with [The Forrester Wave™ And New Wave™ Vendor Review Policy](#), Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with [The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy](#) and publish their positioning along with those of the participating vendors.

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Tel: +1 617-613-6000 | Fax: +1 617-613-5000 | forrester.com