

THE 2023 STATE OF DIGITAL TRANSFORMATION

Key insights to define the next phase of transformation

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Executive Summary

In this year's State of Digital Transformation report, our goal is to identify the key differences between the businesses who succeeded at digital transformation, and those who were still struggling. We surveyed 602 executives from North America, Europe and Asia across a range of industries to highlight not only their current digital capabilities, but the key investments and choices they made that got them to where they are. By separating the responses of high performers and average performers, we identified the key characteristics of companies that successfully met their transformation goals.

This report serves as a benchmark for what digital maturity looks like in 2023 and charts a path forward for businesses who are looking to thrive in the next wave of digital transformation initiatives.

Key findings include:

- The majority of companies (45%) chose business growth as their top goal for digital transformation, followed by innovation (45%) and efficiency (42%).
- Top performing companies tracked metrics like innovation (36%) and digital literacy (32%) to measure digital transformation success, while average performers tracked business performance (42%) and efficiency (40%).
- Limited budgets (34%) and a resistance culture (27%) were the top obstacles to digital transformation success.
- Despite challenging economic times, 42% of digitally mature companies were accelerating their digital transformation efforts in the new year.
- Top performing companies were more likely to have their digital transformation led by the CEO (33%), compared to average performers where the CIO or CTO (36%) were more likely to be in charge.
- The top transformation priorities for companies were upgrading technology (50%), achieving operational efficiency (34%) and getting more value from data (32%).

In 2023, digital transformation priorities shift from buying shiny new objects to leveraging existing bets

When we began 2022, digital transformation was poised to enter an exciting new phase. There was a lot of hype around compelling new technologies such as cryptocurrency, blockchain, NFTs and the Metaverse. Most enterprises had survived the worst of the pandemic and were even thriving as customer demand roared back. Digital progress happened at an exponential rate as businesses raced to offer ecommerce, virtual collaboration, better customer experiences and innovative products.

Now, in 2023, a series of events have stopped the march of digital transformation and sent us back to basics. The war in Ukraine, inflation, climate crises and economic uncertainty have collectively brought the world to the brink of a global recession, and businesses are feeling the effects.

In our conversations with business leaders, and the results of the survey, a clear theme has emerged. Businesses are still committed to digital transformation, but they'll have to make do with less. This means that for the most part, investment in new technologies will be limited, and practice leaders will be under pressure to deliver results using their existing people and technologies.

Our findings show four areas where businesses can be expected to focus for this year.

- **Employee skills and experience:** Over the pandemic, companies that prioritized the employee experience were far more likely to have successful transformations. We're seeing continued focus on improving the workplace, collaboration and building a digital-first culture that promotes agility and autonomy.
- **Data management and analytics:** Businesses have even more to gain by leveraging their customer data for better engagement and product innovation. It also allows them to rely less on data from tech giants such as Google and Meta. We expect to see increased investment in data integration, analytics capabilities and data science leadership.
- **Go-to-market integration:** As global demand cools, businesses will try to get more lifetime value out of existing customers and reduce spend on trying to convert new ones. This means increased coordinated engagement from marketing, sales and service. As a result, we'll see more unified go-to-market teams, and more platform businesses that have free reign to engage the customer across their entire lifecycle.
- **Operational efficiency:** Businesses indicated the need for greater efficiency and speed in their existing processes. This means better cross-functional communication, better storage and deployment of content, and more efficient data sharing across teams.



Digital Transformation Goals and Metrics

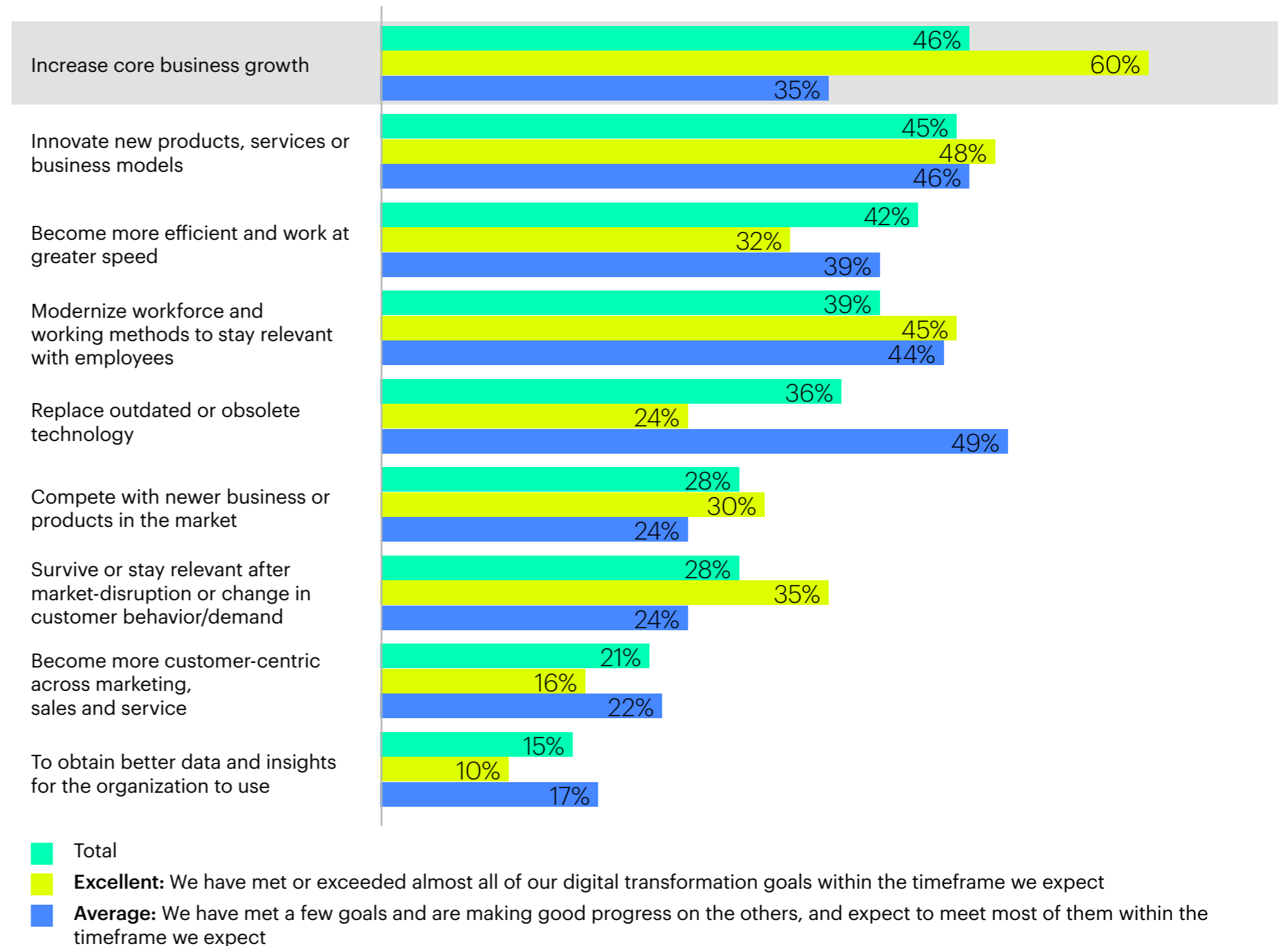
Business growth is now the top transformation goal as innovation takes a back seat

This year, innovation dropped down to second place as increasing core business growth jumped to the top of the list of digital transformation goals (46%). Mature companies were far more likely to cite growth as their top goal (60%) compared to average companies, who were more likely to focus on replacing outdated technology and modernizing the workforce (49%).

This highlights the gap between digitally mature companies, who have moved past the efforts to modernize and update technology and are now focusing on getting the best performance out of their existing systems. As the looming recession presents business challenges, we'll see even more pressure for transformation efforts to show immediate, quantifiable business results rather than simply catching up with the times.

Figure 1:

What were the top reasons for your company's investment in digital transformation?



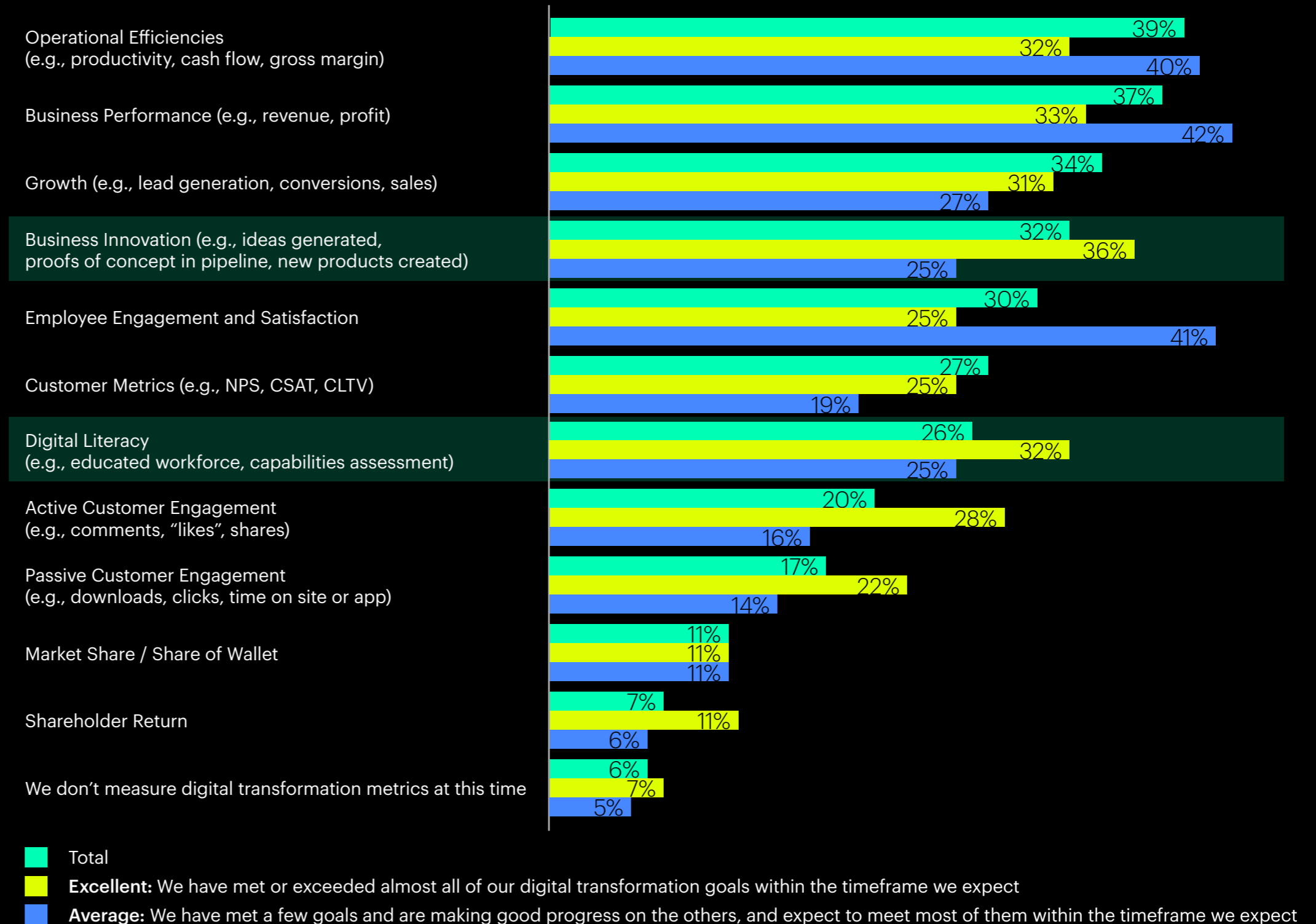
Innovation and digital literacy are mature markers of success compared to business performance

When it comes to measuring the impact of digital transformation, the majority of companies look at gains made in operational efficiencies (39%) and business performance (37%). These metrics make sense for most companies, especially those that have undertaken digital transformation specifically to improve their bottom line.

However, there's a telling difference between average performers and more digitally mature companies. The latter tend to also measure business innovation and digital literacy as markers of success. It's a good reminder that a successful transformation is as much about looking forward, as well as improving the current state. Mature companies put a premium on new ideas, and invest in upgrading the skills of people, rather than just technology.

Figure 2:

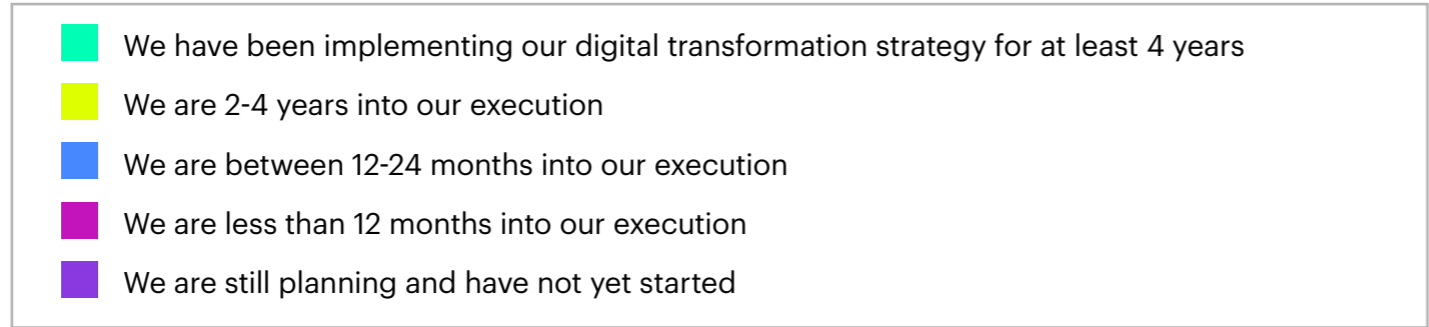
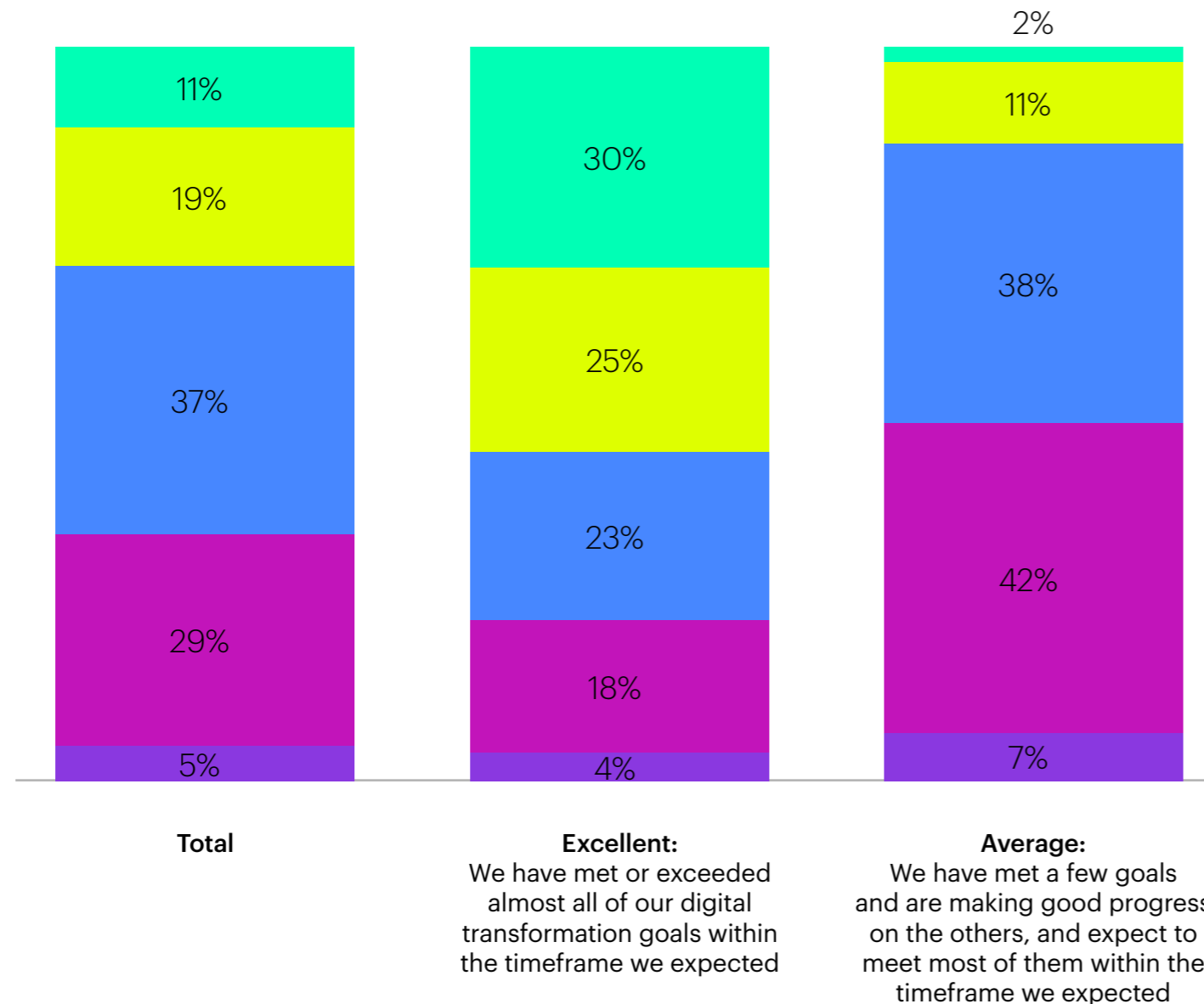
What metrics does your organization actually measure today related to digital transformation?



Digital Transformation Approach

Companies with successful digital transformations started early

Figure 3:
At what stage is your digital transformation?



The majority of companies are still in the early stages of their digital transformation (12-24 months). However, for companies that reported excellent progress with digital transformation, the majority had been working on it for at least 4 years (30%).

An overwhelming majority of average performers were less than 12 months into their digital transformation (42%). This highlights the fact that when it comes to digital transformation, success takes time, and companies should set their expectations accordingly.

It also highlights the benefits of recognizing and adapting to disruptive trends early, rather than waiting for them to become mainstream and catching up.

Digital transformation is no longer implemented in a siloed approach

This is one area where the data was unequivocal — nobody does digital transformation in a vacuum anymore.

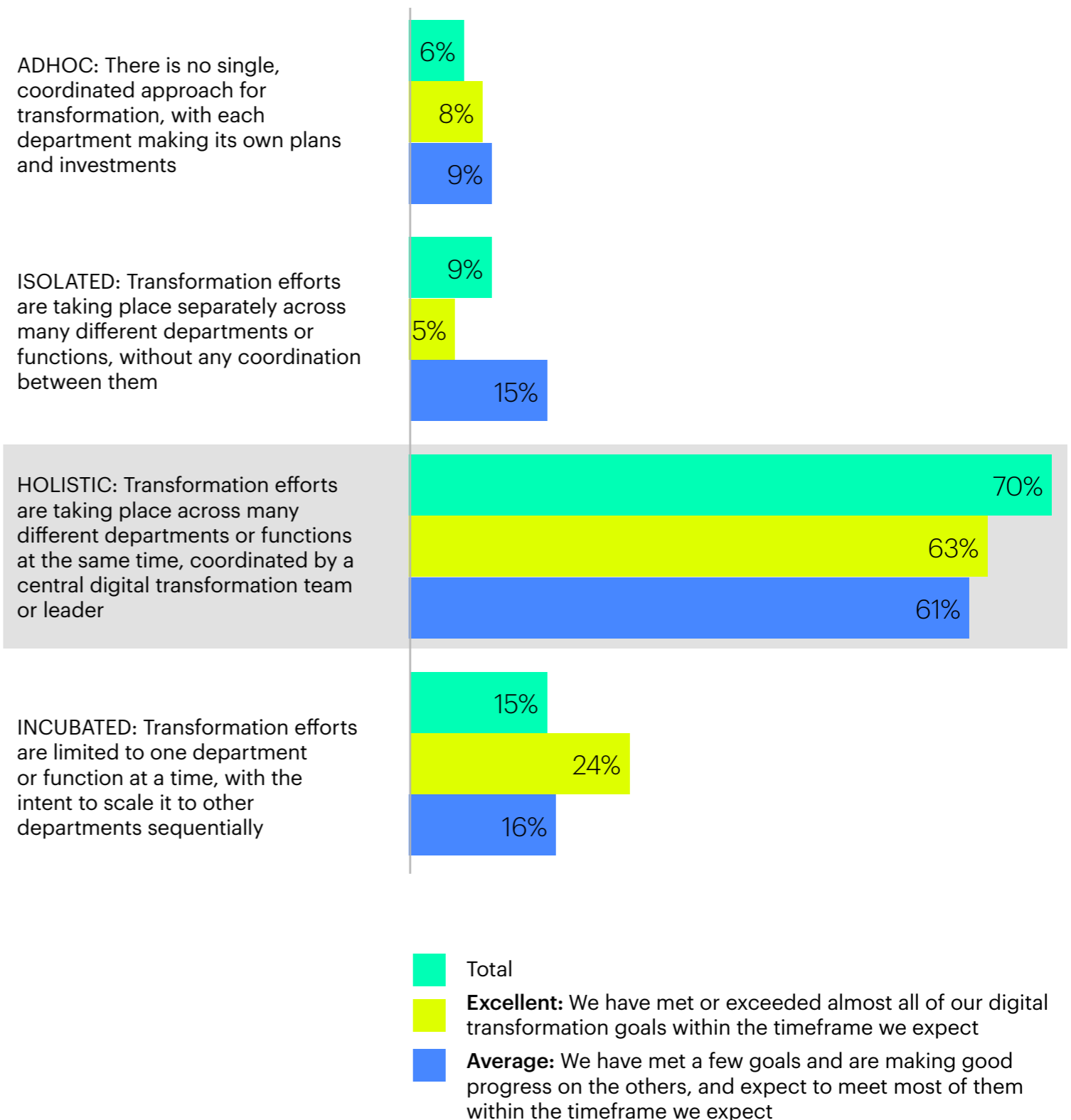
The vast majority (70%) of companies adopt a holistic approach to transformation, where several departments or functions coordinate their efforts to achieve a similar level of digital fluency and technology.

This approach usually requires some central transformation authority such as a transformation management office or head of digital transformation, which may not be feasible for some companies for budget or capability reasons.

For others, it's more practical to limit transformation efforts to a single department or function, prove results and then scale accordingly. For them, the incubated approach makes more sense (15%).

Figure 4:

Which approach best describes how your company implemented (or is currently implementing) its digital transformation program?



Updating IT, data management and operational agility are the top transformation priorities

It's no surprise that most companies (50%) prioritized updating their IT systems as the first step in their digital transformation. That's usually where the most immediate need for upgrades appears, followed by digitally enhanced improvements to everyday operations and processes (34%).

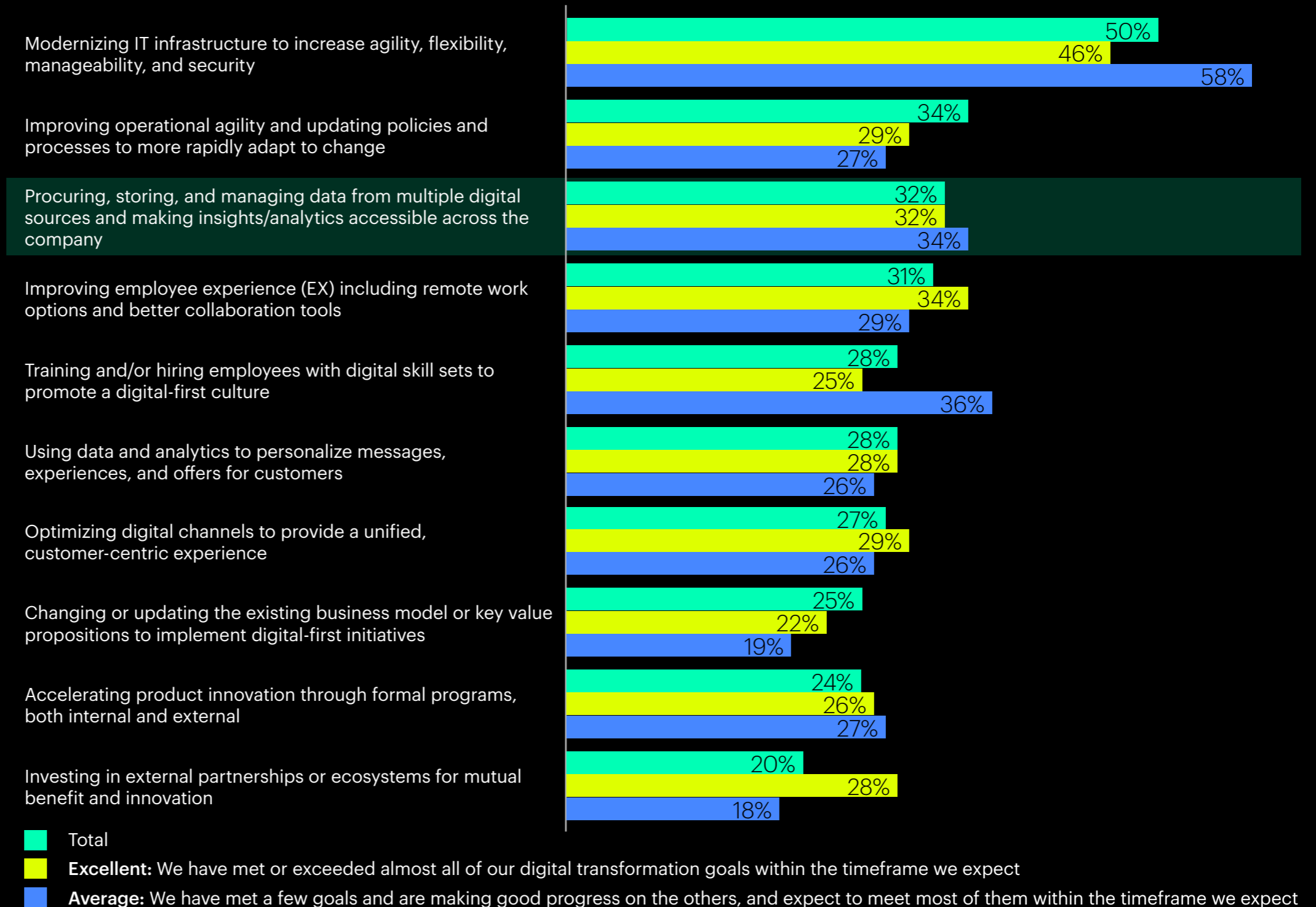
As we move down the list, we find data management (32%) as a top priority. It's interesting to note these "backend" tasks as being top priorities for transformation, compared to more customer-centric endeavors such as optimizing digital channels (27%) or using data to personalize messaging (28%).

This highlights the way most companies tackle transformation, starting from complex data, IT and infrastructure upgrades before customer facing experiences. This makes sense if a company is merely transforming to keep up with the times.

However, a customer-centric transformation would not only help companies have a faster impact on revenue, it would also make the backend work more efficient, since it would be in service of a customer-centric strategy, rather than a mere upgrade.

Figure 5:

Which of the following initiatives did you prioritize first for your digital transformation program?



Budgets and resistant culture continue to be the biggest obstacles to transformation

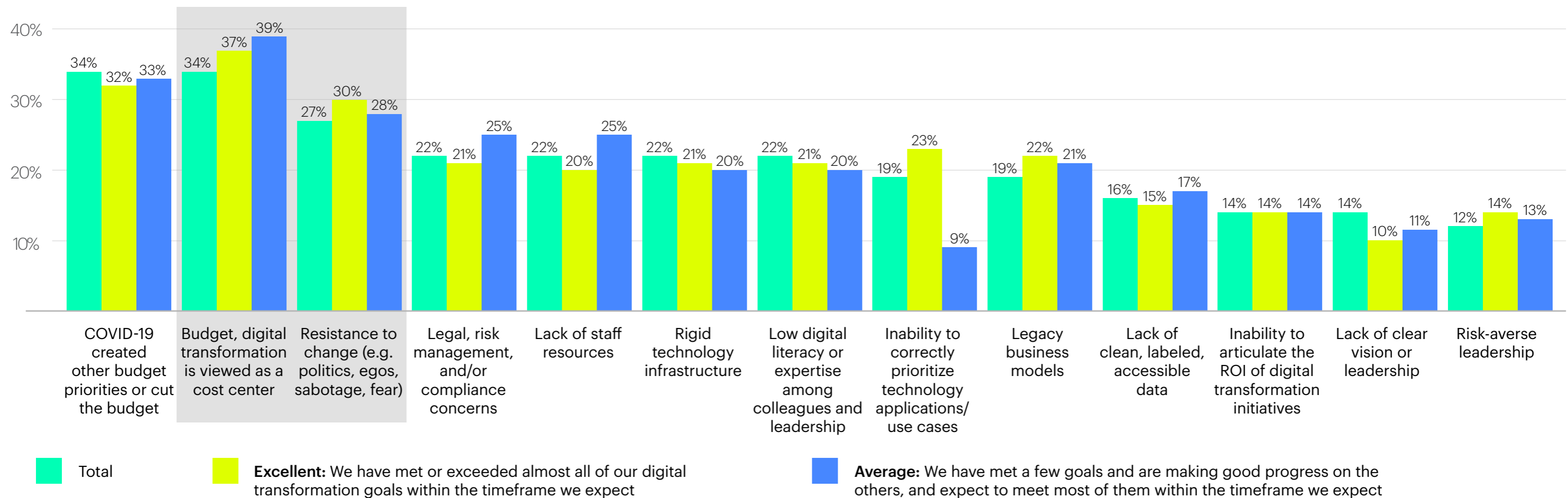
When it comes to measuring the impact of digital transformation, most companies look at improvements in operational efficiencies (39%) and business performance (37%). These metrics make sense for most companies, especially those that have undertaken digital transformation specifically to improve their bottom line.

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Figure 6:

Please indicate the most difficult challenges you or your organization came up against in digital transformation efforts.



Despite the challenging economic climate, mature companies are accelerating their transformation efforts

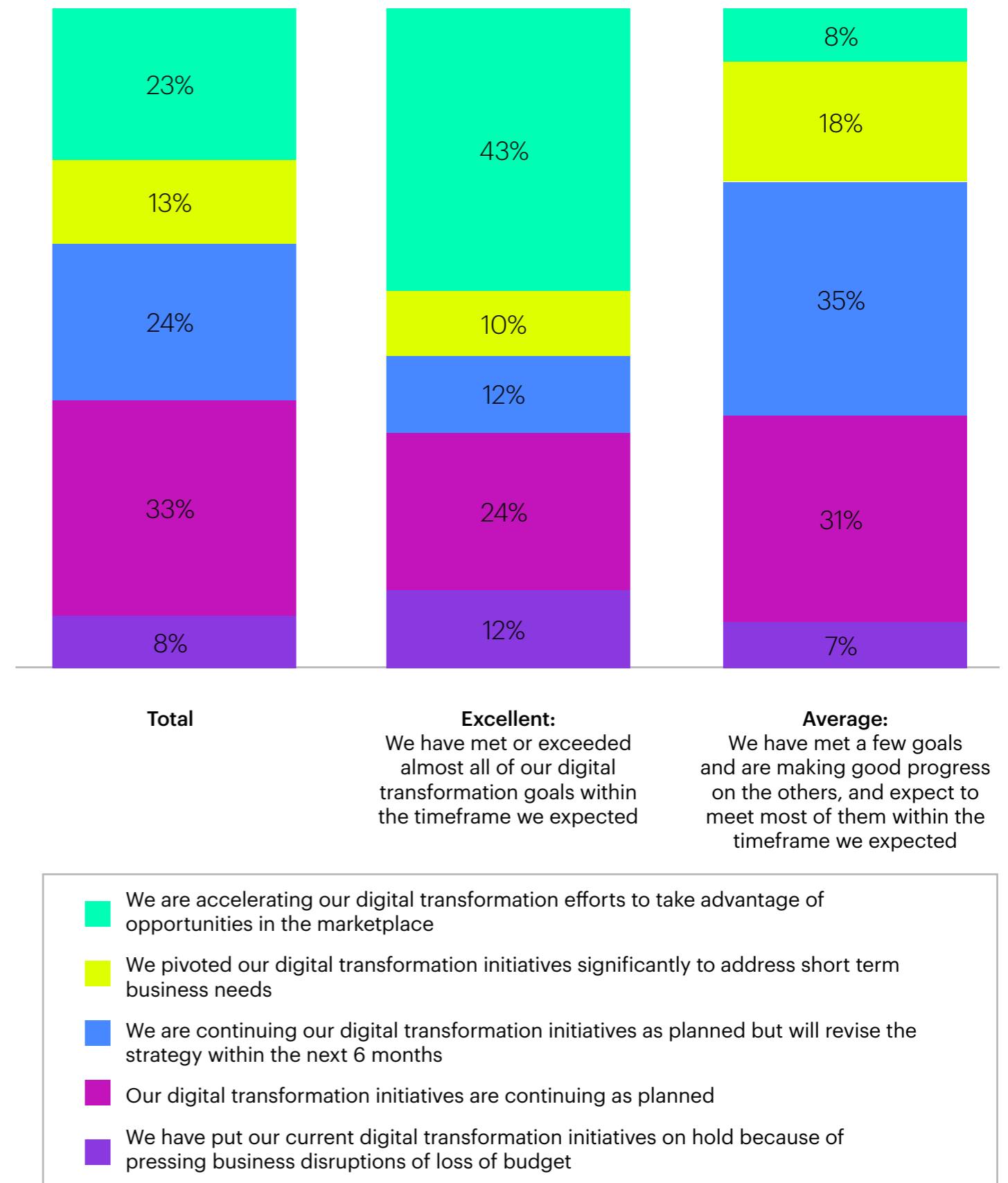
When the COVID-19 pandemic hit in 2020, we saw a temporary pause on transformation efforts, only for most companies to continue and even accelerate their transformation programs. That trend has continued into 2023 despite the challenging economic climate.

While most companies are continuing their digital transformation efforts as planned (33%), the top performing companies are accelerating their transformation programs (43%). It highlights how mature companies see digital transformation as a way to grow and gain an economic edge, beyond merely a technology upgrade.

Key digital investments such as virtual workplaces, personalized digital marketing and selling, optimized e-commerce, and data management are no longer optional, they're benchmarks for survival in trying economic times.

Figure 7:

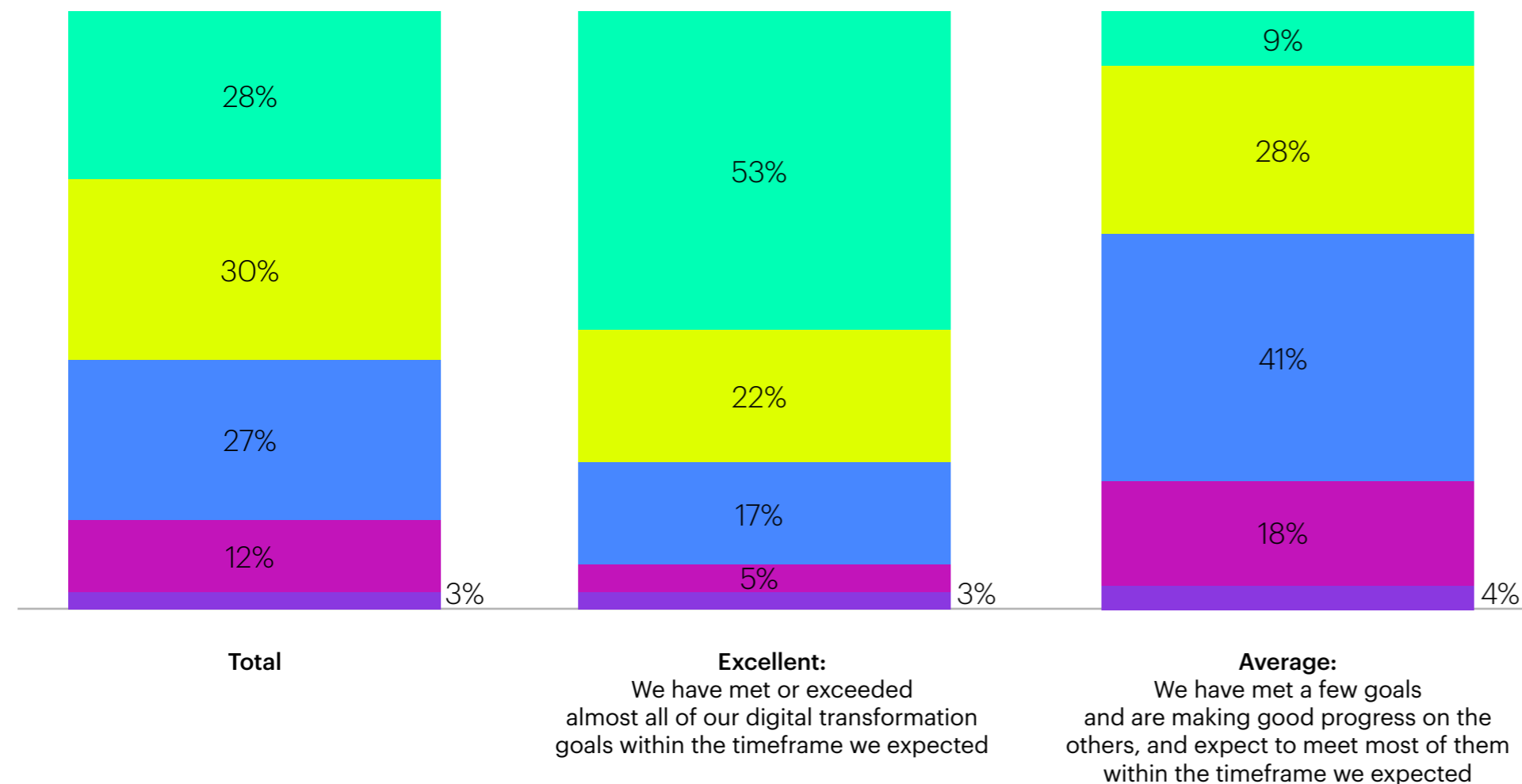
How have your digital transformation initiatives shifted because of COVID-19 or other economic factors this past year?



Organization and Culture

Deep investment in employee experience and collaboration sets successful companies apart

Figure 8: Which of these statements best describes how your organization is transforming employee collaboration and engagement?



During the COVID-19 pandemic, it became apparent that investing in the employee experience was no longer optional. Companies quickly adopted virtual meetings and collaboration tools, and some of the more enterprising ones invested in employees' mental well-being, transparency and a better culture.

The difference between mature companies and average ones is apparent. High performers made employee engagement one of their top strategic objectives (53%), using digital programs to enhance collaboration and align everyone around a shared purpose.

By contrast, average companies (41%) didn't invest in the employee experience beyond the standard tools of collaboration that were limited to departments or functions.

- Employee engagement is one of our top strategic objectives and investment in digital platforms/programs results in our alignment around a shared purpose
- Employees frequently connect and engage digitally across the organization and via multiple devices/channels
- Our employees frequently use employee collaboration platforms to get work done but there is limited digital engagement beyond a product team or department
- We have digital platforms and tools for employee collaboration, but they are not widely used
- We do little to engage employees digitally beyond annual surveys and static intranet

CEOs are more likely to lead successful transformations compared to other executives

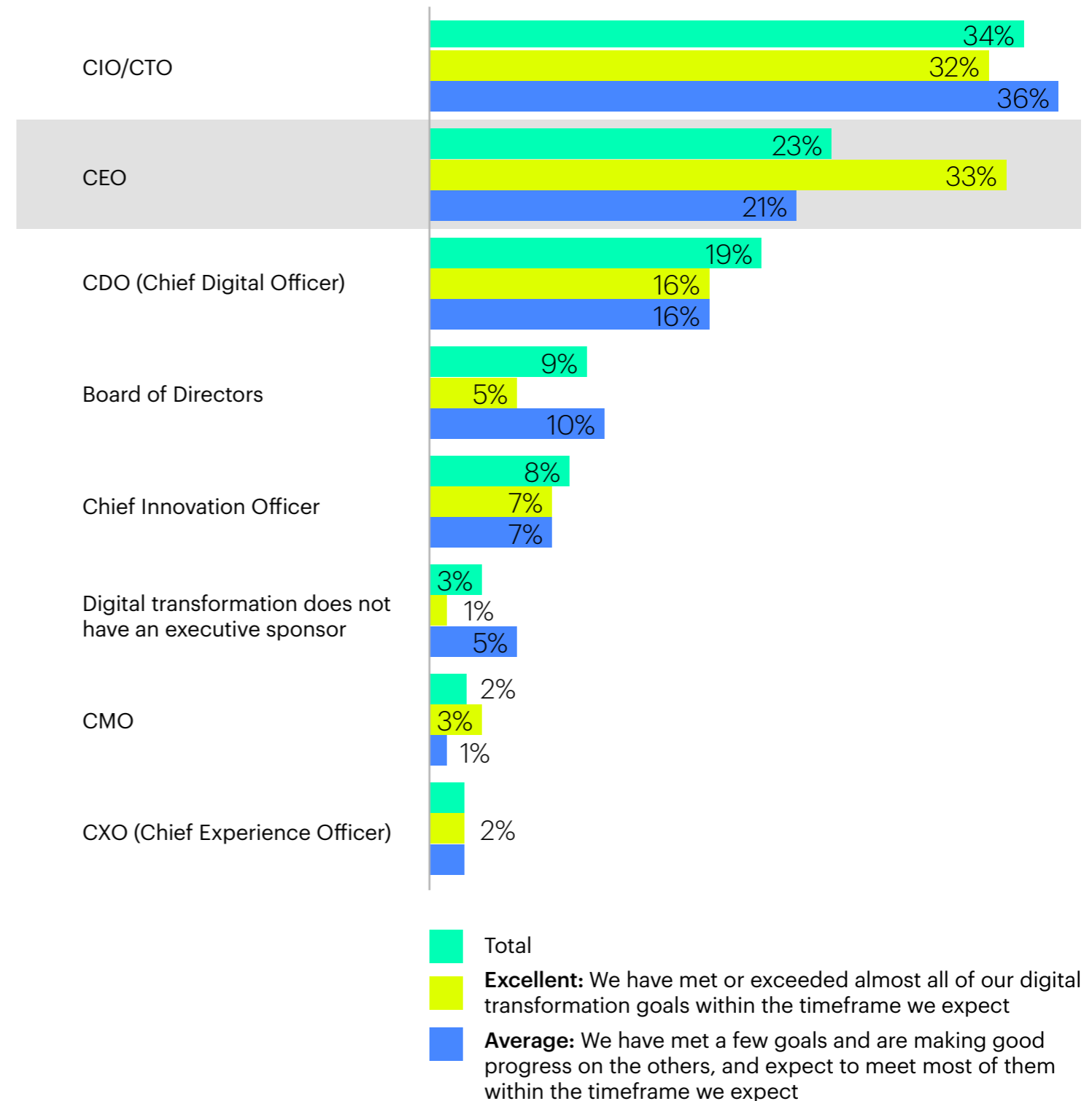
Traditionally, CIOs and CTOs have been tasked with leading digital transformations. This makes sense, given that the first order of business is usually managing the upgrading of IT systems.

While that's still the case for most companies (34%), it's telling that for top performing companies, it's the CEO who's likely to lead the transformation (33%). We're increasingly seeing that involvement of top leadership as a key factor in a successful digital transformation. CEOs are well positioned to solve the biggest transformational challenges, including budget, culture and strategic direction.

It's interesting to see how only 2 percent of digital transformations are led by the CMO. In past years, this figure was much higher, representing the advanced digital progress of the marketing function. However, it's become apparent that today, digital transformation is a firmwide endeavor, one that cannot be limited to a single department of function, and its success depends on top down support, and widespread collaboration.

Figure 9:

Which executive officially owns or sponsors the digital transformation initiative?



Successful digital transformers invest in a culture of agility and autonomy

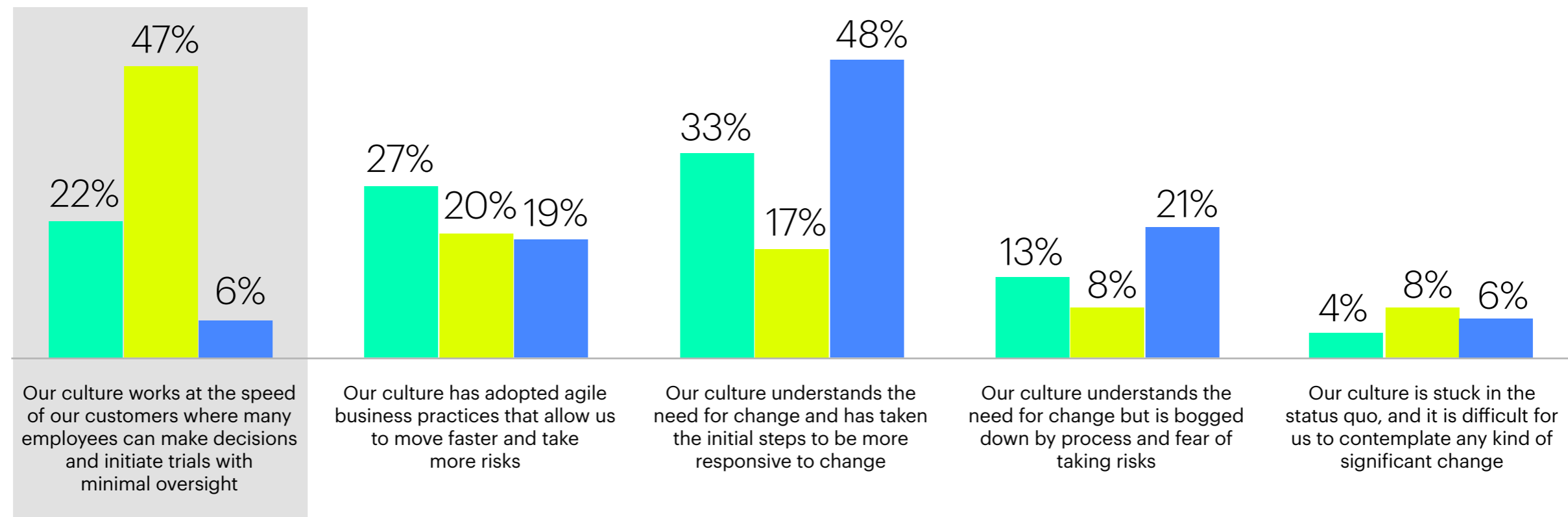
Another key factor in digital transformation success is company culture. In this case, the research found that most successful transformers (47%) had a culture that promoted agility and autonomy. This means empowering individual teams or functions to experiment, innovate and take decisions quickly without having to wait for central oversight. This culture is more likely to lead to innovative ideas and the freedom to improve operations as technology evolves.

By contrast, average performers were still in the process of changing their culture to become more agile, although the majority of them (48%) had acknowledged the need for change and were taking active steps to implement it.

This shows that a competent digital culture isn't just a by-product of transformation, it is a key driving force, and companies that proactively change to become more agile, adaptable and autonomous tend to have better results.

Figure 10:

Which of these best describes the culture of your organization?



Total

Excellent: We have met or exceeded almost all of our digital transformation goals within the timeframe we expect

Average: We have met a few goals and are making good progress on the others, and expect to meet most of them within the timeframe we expect

Digital Capabilities



Digital customer journeys now span different functions and are dynamically updated with data

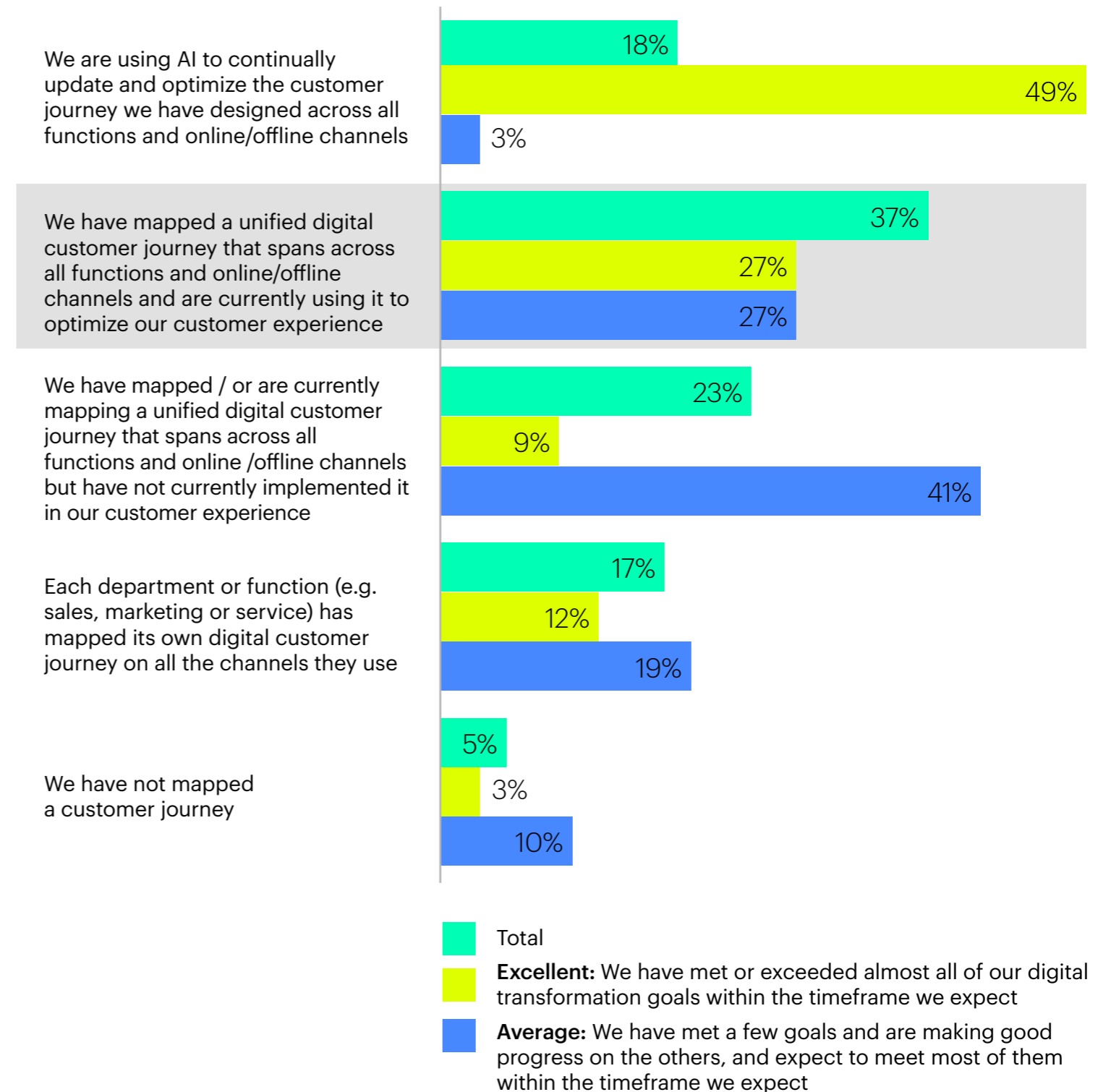
The majority of companies have mapped a digital customer journey that spans across many different (and previously disparate) functions, such as marketing, sales and service.

This converged journey is the first step in the trend of companies increasingly operating with a unified (or at least highly collaborative) "go-to-market" function which covers all points of customer interactions. In this model, the unified team tracks the customer's digital interactions from the point of awareness, all the way to purchase, and continues to engage them post-purchase to ensure loyalty and even repurchase. With the unified journey, the team can capture customer data from different instances and use it to tailor relevant messages, experiences and even products.

While most companies (41%) have mapped the journey, they have yet to start using it operationally. Advanced companies (49%) however are not only implementing the full journey, they are also able to dynamically update it using data analyzed by AI.

Figure 11:

To what extent has your company mapped and used a digital customer journey to design or improve your customer experience?



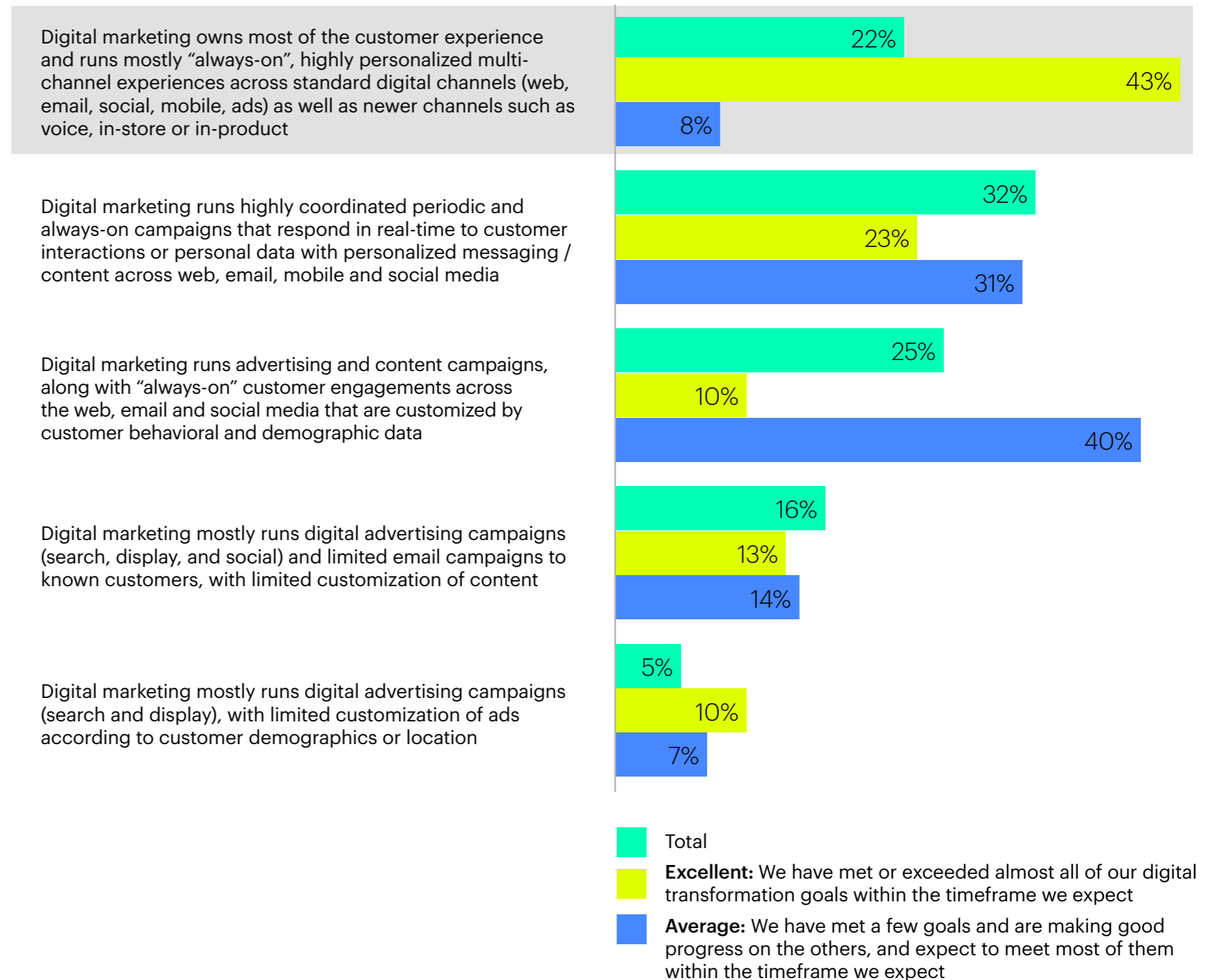
Digital marketing is increasingly personalized, real-time and used beyond traditional marketing functions

The mark of an advanced digital marketing function is its ability to deliver highly personalized, relevant messaging to customers in real-time, across a variety of digital channels and even products. This level of digital marketing owns the customer experience, and is the lynchpin of the emerging practice of a unified go-to-market digital function.

For most advanced companies, this is the level of digital marketing they deploy (43%) which is a substantial 10 percent improvement over the number last year. For average companies, digital marketing is still in the standard operating phase where it is limited to mostly brand or demand gen marketing across a few limited channels. It is worth noting that even at that level, using data to personalize and deliver relevant content and messaging is a standard practice.

Figure 12:

Which of the following statements best describes the current state of your digital marketing operations?



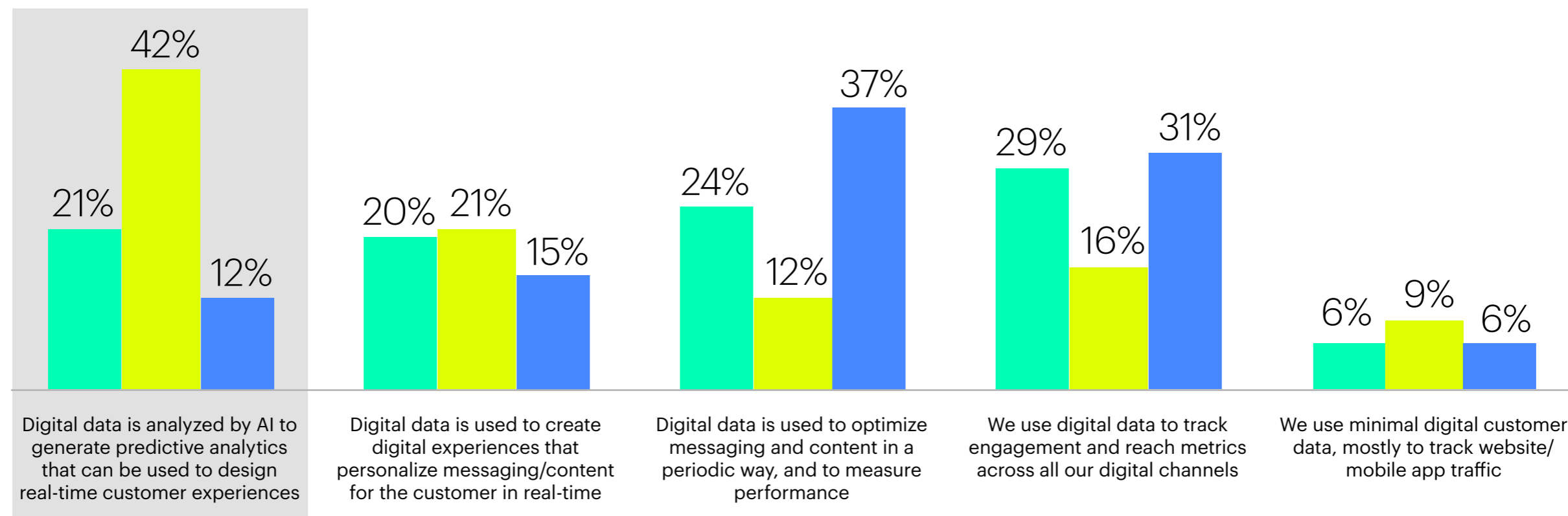
The biggest difference between successful companies and average companies is in how they use data

Using digital data to optimize and personalize messaging and content is now the standard way to do business. Most companies operate at this level (37%). However, successful transformers are far more advanced in how they use data. Not only can they use it to personalize messages and content, the majority (42%) are using AI to analyze the data, make the best recommendation and optimize the results in a continuous feedback loop.

Perhaps no other stat illustrates the gulf between successful transformers and average ones. Leveraging data in a repeatable, scalable way is an enormous advantage for any customer-related function, and prioritizing it is a recurring theme throughout the results of this study.

Figure 13:

Which of the following statements best describes how your company creates value from digital customer data?



■ Total

■ **Excellent:** We have met or exceeded almost all of our digital transformation goals within the timeframe we expect

■ **Average:** We have met a few goals and are making good progress on the others, and expect to meet most of them within the timeframe we expect

Sales, marketing and service are increasingly sharing customer success and revenue goals

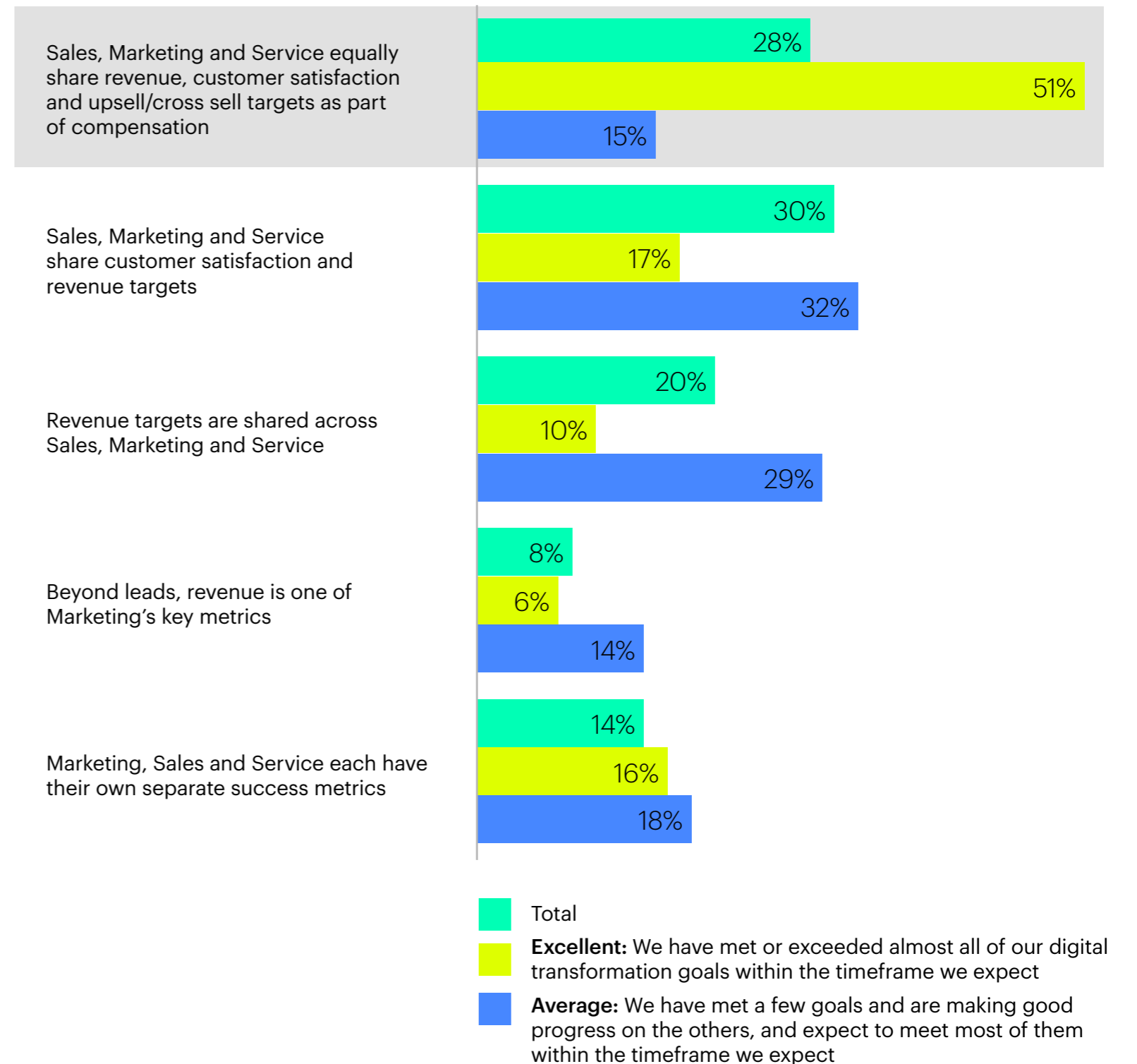
Another marker of the unified go-to-market function between sales, service and market is the creation of shared goals between these departments. This gives them an incentive to collaborate, operate off the same customer journey map, and use a single source of data to power their interactions.

Over half (51%) of advanced companies have set shared revenue and customer satisfaction goals for their go-to-market teams, also adding cross-sell and upsell targets to make sure these teams remain engaged beyond the point of purchase.

Average performers are catching up (32%), with the majority also sharing a few limited goals between sales, service and marketing. Shared goals are thus the new norm, and a great first step for companies looking to create a unified go-to-market function, or even just an improved customer experience.

Figure 14:

How do you currently measure success across marketing, sales and service teams?



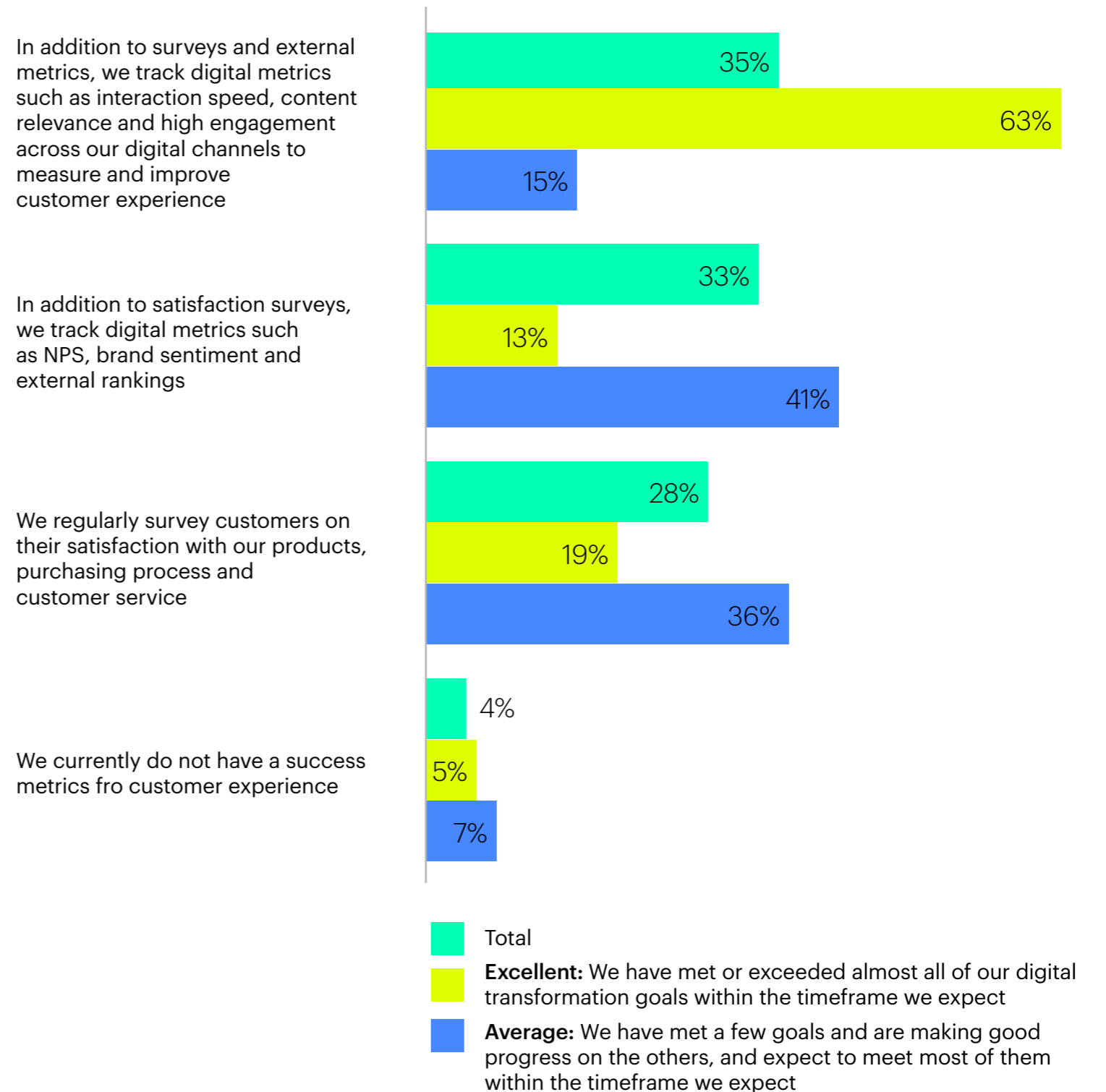
Mature companies combine use both analog and digital metrics to measure customer experience

Top performers were again far ahead of average ones when it came to how they measure customer experience. These digitally mature companies used a combination of digital metrics that measure customer experience in real-time, along with old school methods such surveys and ratings (63%).

While average companies also used digital and analog sources to track customer experience (41%) the key difference is in how. Advanced companies are far more likely to use CX metrics in a continuous, dynamic way, where customer interactions can be recorded and optimized in real-time. By contrast average companies look at CX metrics in a periodic, static way, much like they would survey data or external evaluations.

Figure 15:

How do you currently measure success for your company's customer experience?



Future Investments

The background features a dark, almost black, space filled with vibrant, glowing wavy lines in shades of purple and blue. These lines are composed of a fine grid of small, bright dots, creating a sense of depth and movement, similar to a digital landscape or a data visualization. The overall effect is futuristic and high-tech.

For most companies, Web 3.0 is still in the exploratory phase

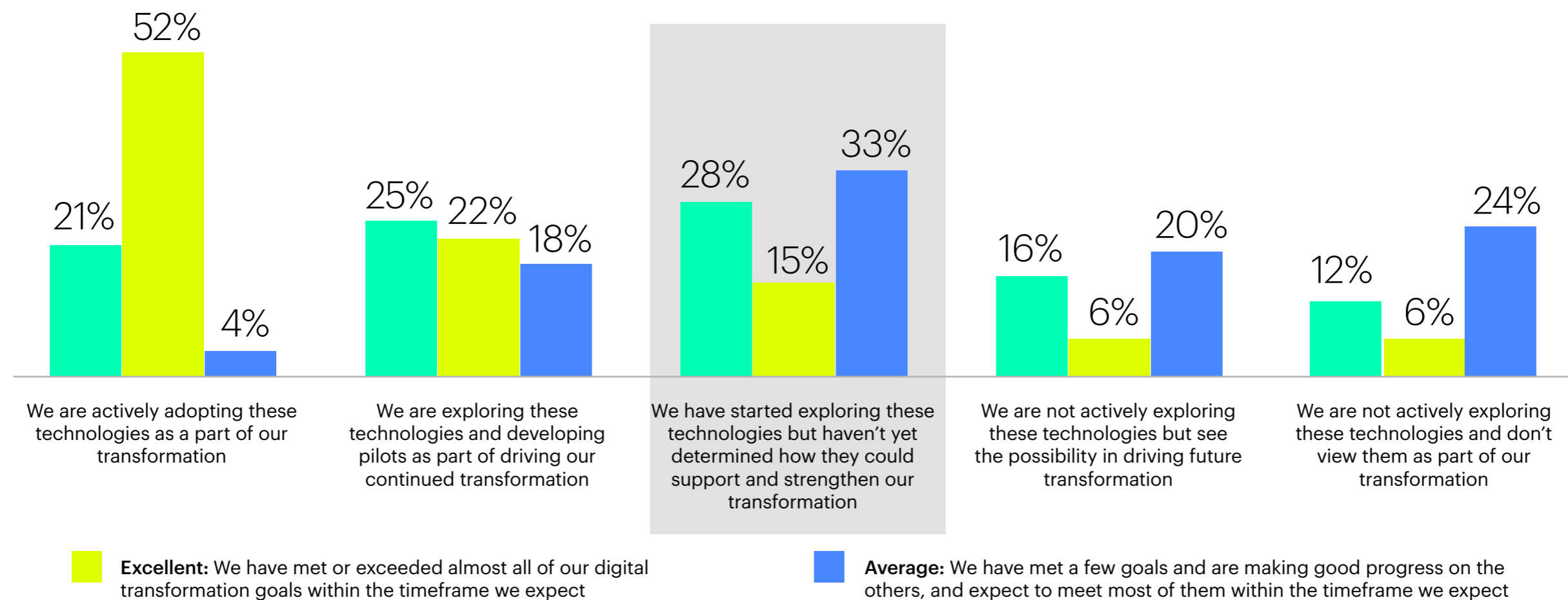
Last year started with a lot of bullish optimism on Web 3.0 technologies such as blockchain, cryptocurrencies and the Metaverse. That enthusiasm has dampened recently due to multiple crypto crashes, Meta's tanking stock price and the market cooling on NFTs.

However, advanced companies are much more likely to already have adopted at least one Web 3.0 technology (52%) which indicates that we might be seeing a market reset that helps these technologies shed their fluctuating valuations and start delivering mainstream business impact.

That doesn't necessarily mean it's time to write off Web 3.0. The majority of companies are adopting a wait-and-see approach, with 28 percent exploring the technologies, even if they lack a plan to use them.

Figure 16:

Which of the following best describes your enterprises current relationship with Web3 technologies (e.g., the Metaverse, Blockchain, cryptocurrencies, NFTs) as part of your overall transformation?



People and processes are a higher investment priority than ever before

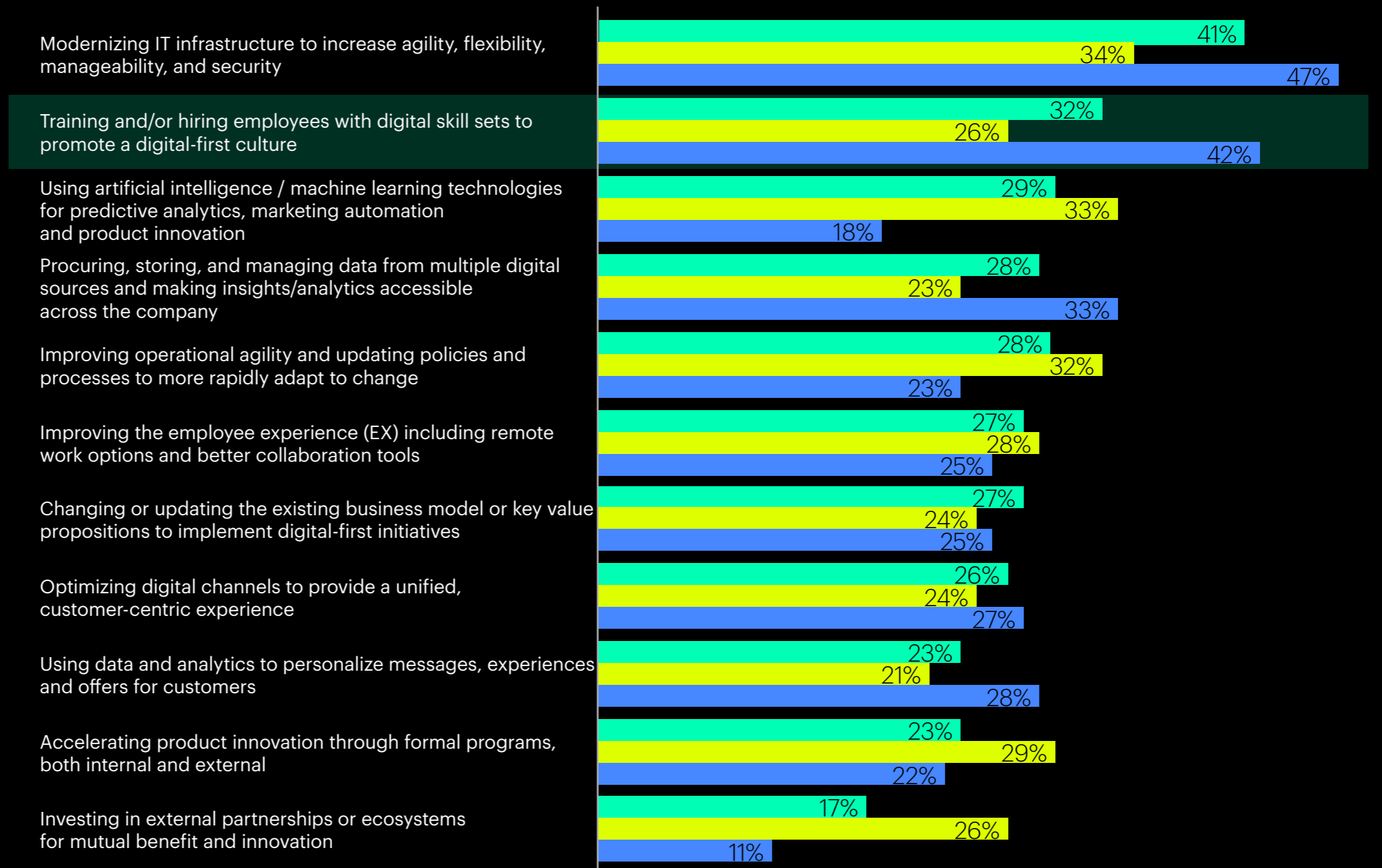
While modernizing IT continues to remain a top priority for the third year in a row, training and hiring employees to promote a digital first culture is number two on the list, the highest it's ever been (32%).

This indicates a shift in transformational priorities where executives have realized that it's less about the tools, and more about the people that use them. Hence, we're seeing increasing investment in training employees on new technology, optimizing existing processes and improving the employee experience.

It's clear that the time for procuring new technology is limited, and transformation leaders are focused on getting the most value of the assets they have, rather than expecting results from new ones.

Figure 17:

Which of the below initiatives will be the top priorities for your next phase of digital transformation?



- Total
- **Excellent:** We have met or exceeded almost all of our digital transformation goals within the timeframe we expect
- **Average:** We have met a few goals and are making good progress on the others, and expect to meet most of them within the timeframe we expect

Cybersecurity, cloud and analytics continue to be the top tech investments

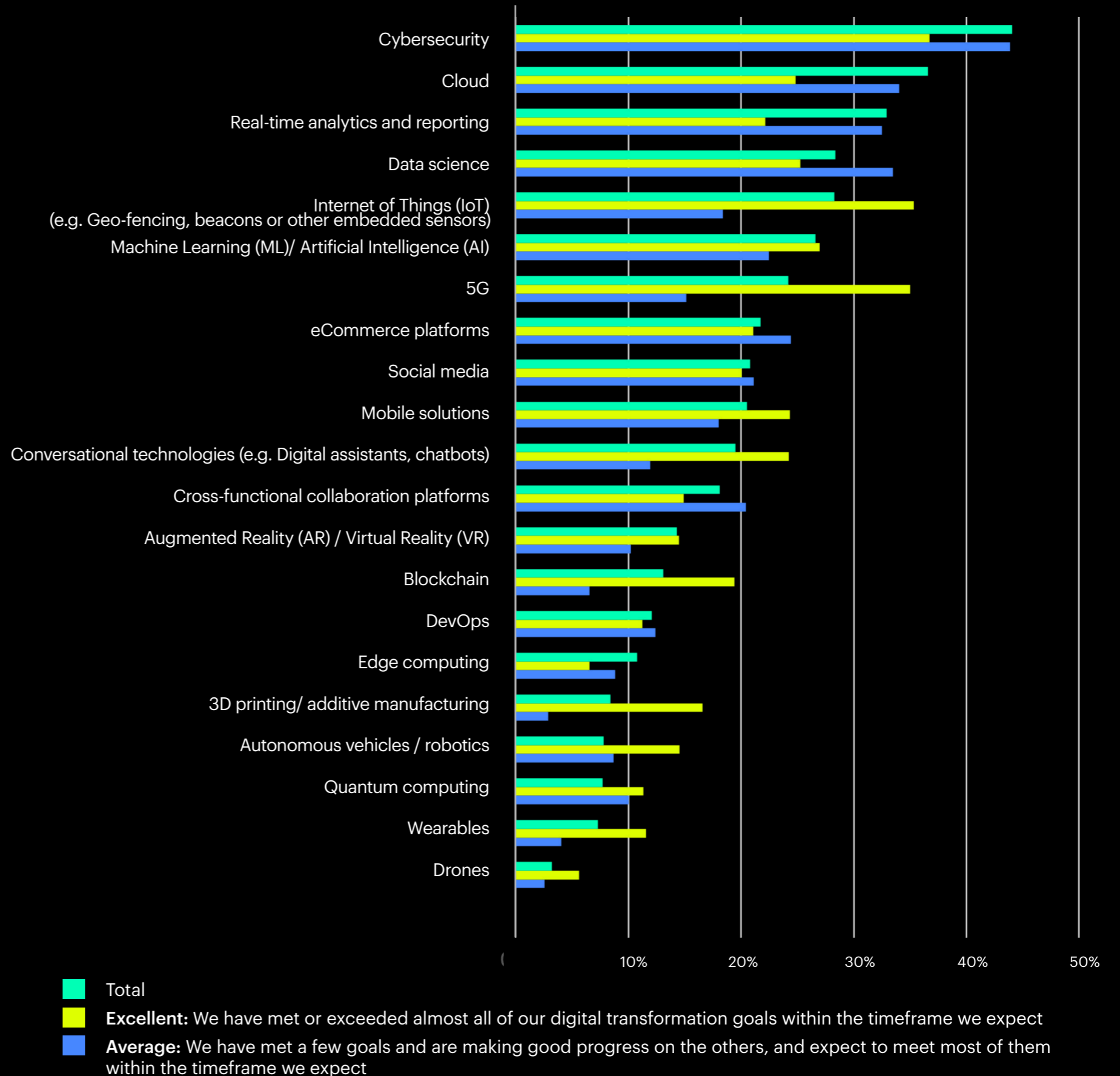
For the third year in a row, cybersecurity is the top tech priority for businesses. This makes sense as companies continue to invest in accessing, storing and leveraging exponentially large amounts of customer data, and getting hacked is a major threat to brand security and trust.

Cloud applications also continue to be a top investment, mirroring the sustained focus on IT upgrades and modernization.

Advanced companies are investing more in IoT than they ever have, and one of the reasons being the increased visibility a connected device provides into the customer's post-purchase journey. As companies look to get more from existing customers, post-purchase marketing and selling will be a key practice, and advanced companies will be looking to create platforms from which they can fully engage customers at every part of the buying cycle.

Figure 18:

What are your top priorities for technology investments in 2021-2022?
You may select up to five.



Key Takeaways

Based on our findings, we can recommend that companies should invest in the following areas, regardless of their levels of maturity in order to thrive in the next phase of digital transformation.

Getting value out of data

Across the board, companies of all maturity levels are investing heavily in data, an asset that is widely recognized as being under utilized. In challenging economic times, the companies that can efficiently extract insights from customer data to design better products, experiences and messaging will gain an edge over a competitor. This focus is especially relevant at a time with marketing budgets are being slashed and companies must come to terms with doing less with more. This means fewer mass marketing campaigns, more one-to-one personalized outreach.

Investing in data is a multi-step process, and while some steps can be de-prioritized a few areas are crucial. Assigning enterprise data leadership is one, followed by identifying the most valuable data use cases across the board. The right data platforms are of course essential. However, we've found most companies already have the key components they need and are more interested in figuring out how to integrate them and obtain continuous insights. Finally, data governance, compliance and security are non-negotiable areas of investment that protect both the company and the customer.

Operational efficiency

Sticking with the theme of doing more with less, most businesses are recognizing that they can be a lot faster and efficient by getting the most out of their existing tools. Practically, this means a few key initiatives. The first step is in learning how to share content, messaging and data across multiple customer facing teams. This can be done by utilizing digital asset management systems, customer data platforms and campaign collaboration tools, which are likely to already have been installed.

The second big investment is in culture. By hiring digitally savvy employees, companies have a greater chance of scaling digital literacy among the existing workforce than costly digital training programs. These employees must also be empowered with greater autonomy to make decisions about optimizing the customer experience, testing new ideas and experimenting with innovation. By decentralizing a lot of the decision-making process, companies can respond to customers quicker, and innovate at a faster rate.





Investing in the employee experience

The employee experience goes beyond simply providing Zoom and Slack as tools for effective collaboration. The most digitally advanced companies are paying close attention to what the future of work might look like post COVID. Aside from facilitating remote work, it means meeting the expectations of employees who demand diversity, transparency, a clear vision, and an appreciation for life outside work. The economic climate might be challenging, but the companies with the most capable, satisfied and motivated workforces will be the ones that persevere.

Engaging at the post-purchase stage

In addition to marketing, sales and service coordinating on customer engagement throughout the funnel, we'll see the proliferation of digital platforms, where businesses create spaces for the continuous digital dialog between customer and company. We've already seen cloud software companies start to engage customer directly through the product after purchase to renew subscriptions or upsell to new features. Other industries will soon catch on as it becomes harder to spend money on converting new customers and marketing teams will look to get more out of existing ones.

However, post purchase engagement doesn't need to start with a platform. Traditional engagement channels such as email and mobile apps are good places to begin post-purchase communication, or at least gather data that sheds light on how the customer uses the product, and identify opportunities to engage.

Methodology

We surveyed 602 professionals from brands, consulting firms, and other organizations with at least 1,000 employees, across three geographies: The United States, Europe (U.K., France, and Germany), The People's Republic of China, Singapore, Vietnam and Malaysia. The respondents from these organizations included in-house and agency digital strategists and C-suite or other executive-stage leaders. Our sample includes a fixed quota of respondents from five industry verticals: Banking/Finance, Manufacturing, Healthcare, Retail, and Technology. We asked each respondent multiple choice answer questions about digital transformation at their respective organizations or organizations they serve.

Acknowledgments

Many thanks to my colleagues at Prophet, Ted Moser, Chan Suh, David Novak, and Kristen Groh for their guidance and vision in shaping this survey and generating actionable insights from its results.

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As an analyst and the research director for Altimeter, Omar publishes research that helps companies thrive on digital disruption. His areas of focus include digital transformation, digital marketing excellence, content and data strategy.

These research reports include industry benchmarks, maturity models, guides for developing strategies, and frameworks for evaluating people, processes and tools. As a consultant, Omar has advised leading brands on how to choose marketing technology, build digital systems for marketing, and create digital content strategies. He has also worked with MarTech companies on product evaluation and competitive analysis.

Omar holds a masters degree in journalism from Columbia University and was formerly the editor-in-chief of the digital marketing blog The Hub Comms. He was also a writer for Direct Marketing News, PRWeek, Fortune and The Brooklyn Ink.

About Altimeter, a Prophet company



Altimeter is a research and consulting firm owned by Prophet that helps companies understand and act on technology disruption. We give business leaders the insight and confidence to help their companies thrive in the face of disruption. In addition to publishing research, Altimeter analysts speak and provide strategy consulting on trends in leadership, digital transformation, social business, data disruption, and content marketing strategy.

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Altimeter research is applied and brought to life in our client engagements. We help organizations understand and take advantage of digital disruption. There are several ways Altimeter can help you with your business initiatives:

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Altimeter creates strategies and plans to help companies act on business and technology trends, including ethical and strategic data use and communications. Our team of analysts and consultants work with global organizations on needs assessments, strategy roadmaps, and pragmatic recommendations to address a range of strategic challenges and opportunities.

Education and Workshops

Engage an Altimeter speaker to help make the business case to executives or arm practitioners with new knowledge and skills.

Advisory

Retain Altimeter for ongoing research-based advisory: Conduct an ad-hoc session to address an immediate challenge or gain deeper access to research and strategy counsel.