

Compensation Emerging Providers Buyers Guide

Software Provider and Product Assessment



EXECUTIVE
SUMMARY

***iSG** Research



Compensation Emerging Providers

Emerging providers capture the innovation frontier of the compensation technology market, where newer and niche entrants strive to balance breadth with distinctive approaches to usability, insight and transparency. These solutions often address the same foundational needs as established platforms—planning, analytics and operational administration—but differentiate through faster iteration, novel data models, embedded intelligence or reimagined user experiences (UX). For buyers exploring alternatives to incumbent suites, this segment offers options that can accelerate time to value or introduce capabilities that challenge the status quo, provided that governance, scale and integration needs are met.

ISG defines emerging providers within compensation management as having software offerings that deliver reasonable coverage across the core pillars of compensation—planning, analytics and operations—while demonstrating differentiated UX, features or architecture but not yet the maturity, scale or polish of leading total compensation management platforms.

These solutions typically include elements of salary, bonus and equity planning; range and job architecture alignment; pay analytics and equity diagnostics; workflow, approvals and exception handling; and employee or manager-facing communication, though often with uneven depth by area. In practice, emerging providers emphasize innovation velocity, configuration flexibility and modern integration patterns to win footholds with design-forward HR teams, regional business units or enterprises undertaking targeted modernization.

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The emerging cohort has historically gained traction by solving pain points left unaddressed by larger suites: clunky planning interfaces, rigid modeling, slow analytics refresh or limited transparency for managers and employees. Early entrants focused on replacing spreadsheets with elegant, web-first experiences and on accelerating implementations through templated configurations. As compensation programs expanded in complexity—multi-country policies, equity refresh cycles, pay transparency obligations—these providers layered in data pipelines, rules engines and baseline analytics to meet enterprise expectations without sacrificing speed.

Over the last few years, the most notable evolution has been the infusion of artificial intelligence (AI) into pricing, anomaly detection and guided decisioning, alongside a renewed focus on explainability and policy governance. Emerging providers have also embraced modern development practices—API-first architectures, event streams and componentized



UI—enabling faster extensions and partner integrations. As they mature, many providers are investing in administrative control surfaces, audit and effective-dating rigor and performance under peak cycle loads, which are essential milestones on the path from promising alternative to enterprise-grade contender.

Enterprises evaluating emerging providers need a clear line of sight to innovation that is practical, governed and sustainable at scale. They should prioritize explainable AI that not only flags anomalies and suggests guideline-consistent actions but also discloses assumptions, data lineage and guardrails. They should expect scenario modeling that reconciles budgets, eligibility and performance distributions while surfacing downstream payroll and equity implications. Importantly, they should calibrate risk by validating off-cycle administration, integration reliability with HRIS, payroll and survey sources, and the platform's capacity to operate across multiple countries without fragmenting policy. In this context, by 2027, HCM software providers will realize the limitations of their application suites and will transition to focus on generative AI (GenAI), agentic AI and worker twins to engage HR and managers for requests and notifications. For compensation buyers, that shift means prioritizing providers whose AI roadmaps move beyond dashboards to agentic assistance that orchestrates tasks, enforces policy and explains outcomes in natural language.

Beyond intelligence, enterprises need operational durability. That includes preflight data checks, exception queues with financial materiality scoring and reconciliation from approved actions to payroll results. They need configuration lifecycle controls—sandboxing, change promotion and audit trails—so innovation does not outpace governance. They also need clarity on provider viability and support: documented security practices, compliance certifications, predictable SLAs and referenceable customers in comparable complexity. For many organizations, an emerging provider can be a fit for a defined scope such as planning and benchmarking or analytics and reporting, so long as the integration footprint is robust and the roadmap is credible for the broader total compensation management vision.

To meet enterprise needs, successful emerging platforms must pair differentiation with discipline. At a minimum, they should offer role-based access, configurable approvals, data validation and audit logging, effective-dated histories and reliable peak-season performance. Their data models should support job architecture, ranges and grades, eligibility logic and multiple reward instruments, with consistent definitions for compa-ratio, range penetration and target total compensation. Integrations must be secure and well-documented, with APIs and event hooks that keep HRIS, payroll and financial systems synchronized and reduce manual reconciliation.

Human Capital Management
Market Assertion

By 2027, HCM software providers will realize the limitations of their application suites and will transition to focus on GenAI, Agentic AI and worker twins to engage HR and managers for requests and notifications.

Matthew Brown
Director of Research, Human Capital Management

ISG Research



Where emerging providers can truly stand out is in the quality of their intelligence, modeling and experience layers. Explainable AI should provide transparent rationales and sensitivity analyses, not black-box scores. Modeling should allow planners and finance partners to test funding strategies by P&L and talent segments and to compare scenarios side by side with clear equity and budget impact. Manager and employee experiences should elevate

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understanding with contextual guidance and total rewards narratives that adapt to local norms within global standards. Finally, administrative control surfaces must be first-class: policy engines, environment promotion workflows and monitoring that expose process health, queue backlogs and SLA adherence. These disciplines convert innovation into enterprise-ready reliability.

Within the Compensation Buyers Guide, the Emerging Providers category exists to spotlight platforms that deliver credible breadth across planning, analytics and operations but have not yet achieved the maturity, scale or polish of leading TCM providers. The guide's purpose is to help buyers identify where an emerging solution can advance specific objectives—modern UX, faster iteration, skills-aware pricing or agentic

assistance—without compromising governance and auditability. This lens recognizes that innovation cycles increasingly originate outside incumbent suites and that enterprises may adopt a phased approach, beginning with a targeted foothold while maintaining optionality for broader adoption.

Scope boundaries are explicit. Emerging Providers differs from total compensation management in that it does not assume end-to-end depth across design, execution, analytics and communication at global enterprise scale. It differs from planning and benchmarking, analytics and reporting, and compensation operations in that it evaluates breadth and innovation potential across these dimensions rather than excellence in a single, mature subcategory. The category also acknowledges that customer profiles may skew toward midmarket or specific regions even when the product is capable of enterprise deployments, and that provider trajectories are dynamic—today's emerging provider can become tomorrow's TCM contender as maturity and scale are proven.

Enterprises considering an emerging provider should test for innovation with governance by piloting real scenarios across multiple countries, currencies and worker types, validating integrations and reconciliation to payroll, and insisting on explainable AI that advances decision quality without obscuring policy. They should map provider roadmaps to a clear path toward enterprise-grade controls, ensure that administrative tooling supports safe change management and obtain references that match their complexity. Above all, buyers should



frame the decision as a portfolio choice: adopt targeted innovation where it demonstrably improves planning precision, operational integrity or transparency while preserving integration and data standards that keep the door open to an eventual end-to-end TCM posture.

The 2025 ISG Buyers Guide™ for Compensation Emerging Providers highlights solutions that combine functional breadth with innovative design. It assesses platforms offering coverage across planning, analytics and operations, along with differentiated UX, strong collaboration features and scalability potential. The evaluation also considers readiness for production use, helping buyers identify forward-thinking options that deliver value without the complexity of enterprise-scale systems.

This research evaluates the following software providers that offer products that address key elements of compensation as we define it: Aeqium, BetterComp, ChartHop, CompLogix, Comport, Decusoft, Lattice, Leapsome, Pave, Quisitive and Zimyo.



Buyers Guide Overview

ISG Research has conducted market research for over two decades across vertical industries, business applications, AI and IT. We have designed the ISG Buyers Guide™ to provide a balanced perspective of software providers and products that is rooted in an understanding of business and IT requirements. Utilization of our research methodology and decades of



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experience enables our Buyers Guide to be an effective method to assess and select software providers and products. The findings of this research provide a comprehensive approach to rating software providers and rank their ability to meet specific product and customer experience requirements.

The ISG Buyers Guide for Compensation Emerging Providers is the distillation of continuous market and product research. It is an assessment of how well software providers' offerings address enterprises' requirements for compensation software. The Value Index methodology is structured to support a request for information (RFI) for a request for proposal (RFP) process by incorporating all criteria needed to evaluate, select, utilize and maintain relationships with software providers. The ISG Buyers Guide evaluates customer experience and the product experience in its capability and platform.

The structure of the research reflects our understanding that the effective evaluation of software providers and products involves far more than just examining product features, potential revenue or customers generated from a provider's marketing and sales efforts. It can ensure the best long-term relationship and value achieved from a resource and financial investment. We believe it is important to take a comprehensive, research-based approach, since making the wrong choice of compensation software can raise the total cost of ownership, lower the return on investment and hamper an enterprise's ability to reach its potential. In addition, this approach can reduce the project's development and deployment time and eliminate the risk of relying on opinions or historical biases.

ISG Research believes that an objective review of existing and potential new software providers and products is a critical strategy for the adoption and implementation of compensation software. An enterprise's review should include a thorough analysis of both what is possible and what is relevant. We urge enterprises to do a thorough job of evaluating emerging compensation providers and offer this Buyers Guide as both the results of our in-depth analysis of these providers and as an evaluation methodology.



Key Takeaways

Emerging compensation platforms are redefining how enterprises approach pay planning and analytics by emphasizing flexibility, transparency and embedded intelligence. These providers balance innovation with governance, introducing AI-enabled modeling and explainable decisioning within lighter, faster architectures. While most have yet to reach the maturity or scale of established total compensation suites, they deliver credible breadth across planning, analytics and operations. For buyers, this market represents a proving ground for agile, design-forward solutions that can extend enterprise modernization without sacrificing compliance.

Software Provider Summary

ISG evaluated 11 emerging software providers for this study: Aeqium, BetterComp, ChartHop, CompLogix, Comport, Decusoft, Lattice, Leapsome, Pave, Quisitive and Zimyo. The overall Leaders were **Pave, Lattice** and **Leapsome**, each recognized for balanced strength across capability, platform and customer value. Comport also performed strongly, earning an Exemplary rating. The research assessed providers on Product Experience and Customer Experience to highlight strengths and areas for improvement

Product Experience Insights

Product Experience represented 80 percent of the overall evaluation, emphasizing **Capability** and **Platform**. Leaders in this dimension were **Pave, Aeqium** and **ChartHop**, which stood out for functional depth across planning, benchmarking and analytics. Providers demonstrating robust integration frameworks, intuitive interfaces and scalable configurations achieved the highest results. Conversely, vendors with limited AI enablement or incomplete administrative controls trailed in maturity. Leaders demonstrated strong Capability in automation and policy governance, and resilient Platform performance through adaptability and usability.

Customer Experience Value

Customer Experience accounted for 20 percent of the evaluation, centered on Validation and TCO/ROI. Lattice, Leapsome and Comport led this area, backed by detailed documentation, transparent business cases and commitment to customer success. Providers that maintain dedicated customer leadership and invest in clear ROI frameworks earned higher trust scores. Non-Leader vendors typically lacked referenceable case studies and tools that quantify benefit realization, limiting buyer confidence in measurable outcomes.

Strategic Recommendations

Enterprises exploring emerging compensation solutions should pursue innovation with discipline—piloting features that improve planning precision, analytics or transparency while maintaining audit-ready governance. Providers demonstrating explainable AI, configuration control and data lineage transparency will offer the best balance of insight and compliance. Buyers should prioritize platforms with extensible APIs, clear TCO visibility and proven integration reliability. Aligning short-term agility with a roadmap toward enterprise-grade scalability will help organizations capture innovation value without operational risk.



How To Use This Buyers Guide

We recommend using the Buyers Guide to assess and evaluate new or existing software providers for your enterprise. The market research can be used as an evaluation framework to assess existing approaches and software providers or establish a formal request for information from providers on products and customer experience and will shorten the cycle time when creating an RFI. The steps listed below provide a process that can facilitate best possible outcomes in the most efficient manner.

1. Define the business case and goals.
Define the mission and business case for investment and the expected outcomes from your organizational and technological efforts.
2. Specify the business and IT needs.
Defining the business and IT requirements helps identify what specific capabilities are required with respect to people, processes, information and technology.
3. Assess the required roles and responsibilities.
Identify the individuals required for success at every level of the enterprise from executives to frontline workers and determine the needs of each.
4. Outline the project's critical path.
What needs to be done, in what order and who will do it? This outline should make clear the prior dependencies at each step of the project plan.
5. Ascertain the technology approach.
Determine the business and technology approach that most closely aligns to your enterprise's requirements.
6. Establish software provider evaluation criteria.
Utilize the product experience: capability and platform with support for adaptability, manageability, reliability and usability, and the customer experience in TCO/ROI and Validation.
7. Evaluate and select the software provider and products properly.
Apply a weighting the evaluation categories in the evaluation criteria to reflect your enterprise's priorities to determine the short list of software providers and products.
8. Establish the business initiative team to start the project.
Identify who will lead the project and the members of the team needed to plan and execute it with timelines, priorities and resources.

Using the ISG Buyers Guide and process provides enterprises a clear, structured approach to making smarter software and business investment decisions. It ensures alignment between strategy, people, processes and technology while reducing risk, saving time and improving outcomes. The ISG approach promotes data-driven decision-making and collaboration, helping choose the right software providers for maximum value and return on investment.



The Findings

The software providers and products evaluated in the research provide product and customer experiences, but not everything offered is equally valuable to every enterprise or is needed to operate in business processes and use cases. Moreover, the existence of too many capabilities in products may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a more comprehensive set of capabilities in the product is important, and where they match your enterprise's requirements.

An effective customer relationship with a software provider is vital to the success of any investment. The overall customer experience and the full lifecycle of engagement play a key role in ensuring satisfaction and long-term success. Providers with dedicated customer leadership, such as chief customer officers, tend to invest more deeply in these relationships and prioritize customer outcomes to TCO and ROI expectations. It is equally important that this commitment to customer success is clearly demonstrated throughout the provider's website, buying process and customer journey.

Overall Scoring of Software Providers Across Categories

The research finds Pave atop the list, followed by Lattice and Leapsome. Providers that place in the top three of a category earn the designation of Leader. Pave has done so in four categories; Leapsome and Lattice in three; Aeqium in two; and ChartHop, Compport and Decusoft in one category.

The overall representation of the research below places the rating of the Product Experience and Customer Experience on the x and y axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have above median weighted performance to the axis in aggregate of the two product categories place farther to the right, while the performance and weighting for the Customer Experience category determines placement on the vertical axis. In short, software providers that place closer to the upper-right on this chart performed better than those closer to the lower-left.

The research categorizes and rates software providers into one of four categories: Assurance, Exemplary, Merit or Innovative. This representation of software providers' weighted performance in meeting the requirements in product and customer experience.

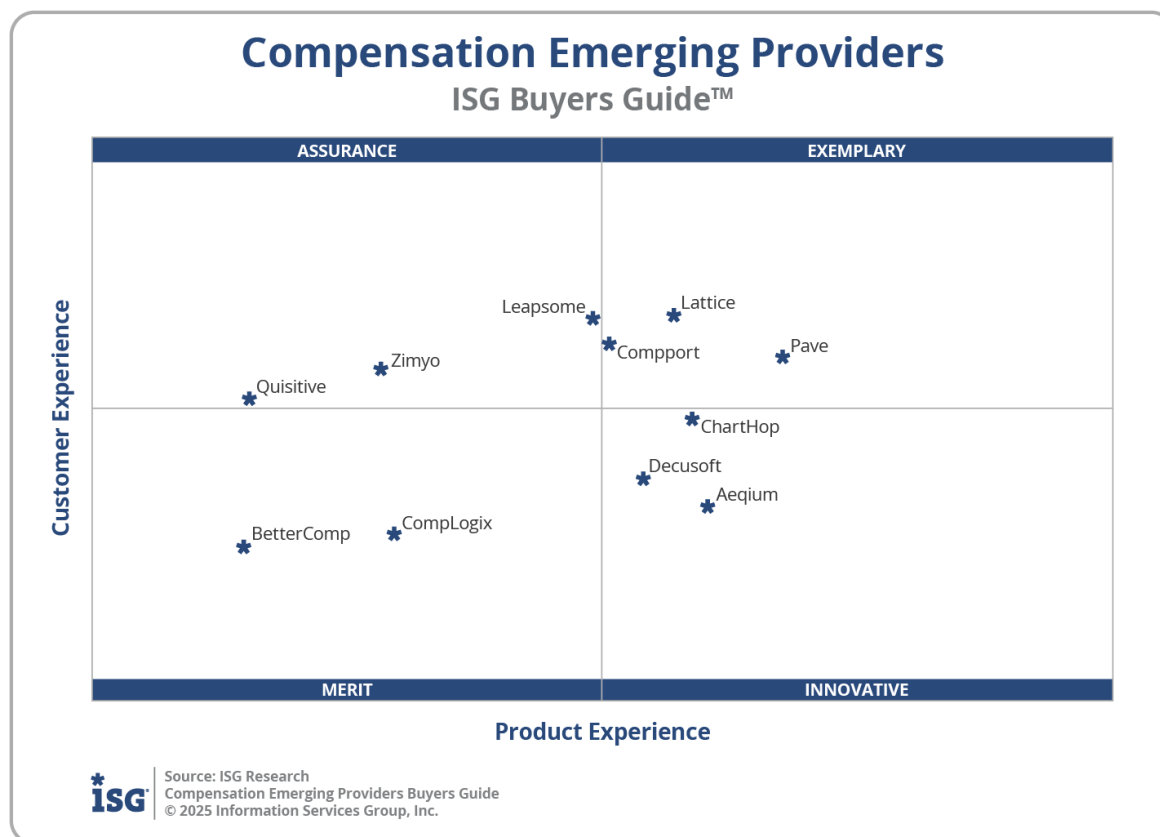
Compensation Emerging Providers

Overall

Providers	Grade	Performance
Pave	B	Leader 63.6%
Lattice	B	Leader 62.9%
Leapsome	B-	Leader 61.5%
ChartHop	B-	59.8%
Compport	C++	55.2%
Aeqium	C++	54.6%
Decusoft	C++	53.3%
Zimyo	C++	50.5%
Quisitive	C+	47.0%
CompLogix	C+	45.3%
BetterComp	C	41.0%



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Exemplary: This rating (upper right) represents those that performed above median in Product and Customer Experience requirements. The providers rated Exemplary are: Comport, Lattice and Pave.

Innovative: This rating (lower right) represents those that performed above median in Product Experience but not in Customer Experience. The providers rated Innovative are: Aeqium, ChartHop and Decusoft.

Assurance: This rating (upper left) represents those that performed above median in Customer Experience but not in Product Experience. The providers rated Assurance are: Leapsome, Quisitive and Zimyo.

Merit: This rating (lower left) represents those that did not surpass the median in Customer or Product Experience. The providers rated Merit are: BetterComp and CompLogix.

We advise enterprises to use this research as a supplement to their own evaluations, recognizing that ratings or rankings do not solely represent the value of a provider nor indicate universal suitability of a set of products.



Product Experience

The process of researching products to address an enterprise's needs should be comprehensive and evaluate specific capabilities and the underlying platform to the product experience. Our evaluation of the Product Experience examines the lifecycle of onboarding, configuration, operations, usage and maintenance. Too often, software providers are not evaluated for the entirety of the product; instead, they are evaluated on market execution and vision of the future.

The research results in Product Experience are ranked at 80%, or four-fifths, using the underlying weighted performance. Importance was placed on the categories as follows: Capability (50%) and Platform (30%). Pave, Aeqium and ChartHop were designated Product Experience Leaders.

Compensation Emerging Providers Product Experience

Providers	Grade	Performance
Pave	B-	Leader 49.8%
Aeqium	B-	Leader 47.0%
ChartHop	B-	Leader 46.6%
Lattice	B-	46.1%
Decusoft	C++	44.7%
Comport	C++	43.0%
Leapsome	C++	42.9%
CompLogix	C+	36.3%
Zimyo	C+	35.5%
Quisitive	C	31.4%
BetterComp	C	31.3%



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Capability of the Product

The Capability criteria is designed to assess the products and features across a broad range of total compensation management capabilities that support the entire compensation lifecycle, from strategic planning and market benchmarking through cycle execution, pay equity analysis and transparent communication of total rewards.

ISG Research evaluated more than 180 different function points in 20 sections to assess the full scope of total compensation management capabilities. It also examined the investment by the software provider. The research weights Capability at 50% of the overall rating. Aeqium, Pave and Decusoft are the Leaders in this category.

The Capability evaluation framework for emerging compensation provides a framework for enterprises. Software providers that have more breadth and depth and support the entire set of needs fared better.

Compensation Emerging Providers

Capability

Providers	Grade	Performance
Aeqium	B	Leader 65.2%
Pave	B-	Leader 62.3%
Decusoft	B-	Leader 62.0%
Compport	B-	58.8%
ChartHop	B-	56.6%
Lattice	C++	53.3%
CompLogix	C+	46.5%
Leapsome	C+	45.0%
Zimyo	C	42.3%
BetterComp	C-	37.4%
Qusitive	C-	33.3%



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Platform of the Product

The Platform category evaluates the underlying requirements of a platform and examines how well a software product meets enterprise needs across business and IT. It measures how effectively the product can be managed and configured and integrated into enterprise environments, how efficiently it can be governed and secured, how reliably it performs and scales, and how intuitively it supports users across varied roles and skill levels. The platform category in the ISG Buyers Guide examines specific requirements for adaptability, manageability, reliability and usability.

The grading of the underlying platform focuses on a software product's overall robustness and the flexibility of a provider's software foundation. Adaptability measures a product's ability to be customized and integrated across systems and data, while manageability focuses on governance, security and compliance. Reliability considers performance and scalability across environments, and usability assesses how intuitive and accessible the product is through design, use of AI and ongoing provider investment.

ISG Research evaluated 16 function points in 5 sections to assess the full scope of platforms capabilities. The research weights Platform at 30% of the overall rating. Leapsome, Lattice and Pave are the Leaders in this category.

Platform is an essential evaluation category as it indicates the strength and resilience of a software provider's product architecture. A well-designed platform ensures secure and compliant operations, dependable scalability and uptime, and a unified, intuitive experience for range of usage personas. It also reflects the provider's capacity to enable deployment models while maintaining flexibility for enterprise demands.

Compensation Emerging Providers Platform

Providers	Grade	Performance
Leapsome	B	Leader 68.2%
Lattice	B	Leader 64.8%
Pave	B-	Leader 62.1%
ChartHop	B-	61.0%
Quisitive	C+	49.1%
Aeqium	C+	48.0%
Zimyo	C+	47.9%
Decusoft	C+	45.6%
Compport	C+	45.3%
CompLogix	C	43.4%
BetterComp	C	41.9%



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Software providers that performed best in the Platform category were those that have support for the breadth and depth of needs across business and IT supporting adaptability, manageability, reliability and usability. Providers with lower performance were challenged in one or more of these areas or did not demonstrate a cohesive, enterprise-grade approach. The underlying platform for a software provider's products is essential in any evaluation.



Customer Experience

The importance of a customer relationship with a software provider is essential to the actual success of the products and technology. The evaluation of the Customer Experience and the entire lifecycle an enterprise has with its software provider is critical for ensuring satisfaction in working with that provider. The ISG Buyers Guide examines a software provider's customer commitment, viability, customer success, sales and onboarding, product roadmap and services with partners and support. The customer experience category also investigates the TCO/ROI and how well a software provider demonstrates the product's overall value, cost and benefits, including the tools and resources to evaluate these factors.

The research results in Customer Experience are ranked at 20%, or one-fifth of the 100% index, and represent the underlying provider validation and TCO/ROI requirements as they relate to the framework of commitment and value to the software provider-customer relationship.

The software providers that evaluated the highest in the Customer Experience category are Lattice, Leapsome and Compport. These category Leaders best communicate commitment and dedication to customer needs.

Software providers that did not perform well in this category were unable to provide or make sufficient information readily available to demonstrate success or articulate their commitment to customer experience. The use of a software provider requires continuous investment, so a holistic evaluation must include examination of how they support their customer experience.

Compensation Emerging Providers Customer Experience

Providers	Grade	Performance
Lattice	B+	Leader 14.7%
Leapsome	B+	Leader 14.6%
Compport	B+	Leader 13.9%
Pave	B	13.7%
Zimyo	B	13.6%
Quisitive	B	12.7%
ChartHop	B-	12.4%
Decusoft	C++	11.1%
Aeqium	C++	10.4%
CompLogix	C+	9.5%
BetterComp	C+	8.9%



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Appendix: Software Provider Inclusion

For inclusion in the 2025 ISG Buyers Guide™ for Compensation Emerging Providers, a software provider must be in good standing financially and ethically, have at least \$3 million in annual or projected revenue verified using independent sources, sell products and provide support on at least two continents and have at least 50 customers. The principal source of the relevant business unit's revenue must be software-related, and there must have been at least one major software release in the last 18 months.

A provider must have a product that provides compensation-specific applications supporting manager and employee, analyst and administrative, analytics and planning capabilities in standalone form or as part of a suite of applications.

The Emerging Providers segment highlights innovative, niche, or newer entrants that aim to deliver reasonable coverage across the breadth of TCM capabilities but lack the maturity, scale, or polish of the leading TCM providers. These platforms generally demonstrate solid functionality in planning, analytics, and operations, but not yet at the level of established leaders. The intent of this segment is to spotlight promising alternatives that could appeal to buyers looking for balanced but more accessible or innovative solutions.

Capability Framework:

- Functional coverage across one or more of Compensation Planning, Analytics, and Operations
- Reasonable support for total rewards communication
- Differentiated UX, Feature Set, or Approach
- Innovation in Collaboration, Transparency, or Insights
- Configurability and Scalability Potential
- Demonstrated Production-Readiness

The research is designed to be independent of the specifics of software provider packaging and pricing. To represent the real-world environment in which businesses operate, we include providers that offer suites or packages of products that may include relevant individual modules or applications. If a software provider is actively marketing, selling and developing a product for the general market and it is reflected on the provider's website that the product is within the scope of the research, that provider is automatically evaluated for inclusion.

All software providers that offer relevant compensation products and meet the inclusion requirements were invited to participate in the evaluation process at no cost to them.

Software providers that meet our inclusion criteria but did not completely participate in our Buyers Guide were assessed solely on publicly available information. As this could have a



significant impact on classification and ratings, we recommend additional scrutiny when evaluating those providers.



About ISG Software Research and Advisory

ISG Software Research and Advisory provides market research and coverage of the technology industry, informing enterprises, software and service providers, and investment firms. The ISG Buyers Guides provide insight on software categories and providers that can be used in the RFI/RFP process to assess, evaluate and select software providers.

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