

# DoD ESI ORDERING GUIDE



**Forrester Research, Inc.**

**Blanket Purchase Agreement (BPA)**

**N66001-19-A-0050**



## Department of Defense Enterprise Software Initiative (DoD ESI) ORDERING GUIDE

This Ordering Guide has been developed by the DoD ESI team to assist IT buyers and contracting officials to order technology products and/or services from the DoD ESI Agreement holder. This Guide contains essential information about the DoD ESI Enterprise Agreement (EA), identifies the authorized users of the EA, summarizes the products and services available under the EA and instructions for users to place an order, and provides Points of Contact information for support.

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### 1. General Information

CONTRACT OR / VENDOR	<b>Forrester Research, Inc. (Forrester)</b>
GOVERNMENTWIDE ACQUISITION CONTRACT (GWAC) NUMBER (e.g. GSA, SEWP) AND WEB LINK	<b>47QTCA18D001C</b> <a href="#">View Forrester’s GSA Contract (click here)</a>
EA NUMBER AND WEB LINK	<b>N66001-19-A-0050</b> <a href="http://www.esi.mil">www.esi.mil</a>
EA ISSUE DATE	<b>25 March 2019</b>
EA EXPIRATION DATE	<b>24 March 2029</b>



**2. Authorized Users**

a. DoD or Agencies

The EA is open for ordering by the “DoD Departments and Agencies” on a world-wide basis. “Departments and Agencies” are defined by the 48 Code of Federal Regulations, Section 202.101. In addition, “DoD or Agencies” includes the Intelligence Community (IC) and the U.S. Coast Guard. For the purposes of this EA, a DoD component is defined as follows: the Office of the Secretary of Defense (OSD), the Military Departments, the Chairman of the Joint Chiefs of Staff, the Unified Combatant Commands, the Inspector General of the Department of Defense (DoD IG), the Defense Agencies, the DoD Field Activities, the U. S. Coast Guard, Intelligence Communities (IC) and Foreign Military Sales (FMS) with a Letter of Authorization. If this EA is co-branded with GSA and is an OMB Designated Best in Class vehicle, it is open to all United States Federal Agencies.

b. GSA, Other Ordering Organizations, and Organizations

GSA or other applicable ordering agencies /organizations, ordering on behalf of the DOD and/or FMS, are authorized to place Orders under this EA and must comply with DFARS 208.74.

c. Contractors and Integrators

Government contractors performing work for a DoD Component (as defined above) may place Orders under this EA on behalf of and for the benefit of the DoD entity if authorized by their cognizant Contracting Officer in accordance with the requirements of FAR 51 and/or DFARS 251 as appropriate.

**3. Products and Services Overview**

Publisher(s)	Category	Product Line	Service Line
Forrester Research, Inc.	N/A	Forrester Arch Forrester Connect Forrester Analytics Forrester Events	Forrester Consulting Services

(full list is available at [www.esi.mil](http://www.esi.mil))



## **Products and Services**

We offer our clients a selection of products, services, and engagement opportunities, which we have branded into five categories: Forrester Research (our core research), Forrester Connect (our peer offerings), Forrester Analytics (rebranded from Forrester Data in the first quarter of 2018), Forrester Consulting, and Forrester Events.

### ***Forrester Research***

Forrester's published research and decision tools enable clients to better anticipate and capitalize on the disruptive forces affecting their businesses and organizations. We believe Forrester Research provides insights and frameworks to drive growth in a complex and dynamic market. Our primary syndicated research product, renamed Research in 2017 (formerly known as RoleView), provides clients with access to our core syndicated research designed to inform their strategic decision-making. Research includes our Playbooks, a set of integrated reports, tools, and guidance for critical business initiatives, and our Reports, designed to deepen clients' understanding of market, customer, and technology trends through data-driven reports, case studies, predictions, and strategic road maps. Our syndicated research also includes The Forrester Wave,<sup>TM</sup> our primary mechanism for evaluating enterprise technologies.

The Forrester Wave provides a detailed analysis of vendors' technologies and services based on transparent, fully accessible criteria, and measurement of characteristics weighted by us. The Forrester Wave allows clients to compare products and develop a custom shortlist based on the client's unique requirements. In 2017, we also introduced our first Forrester Industry Waves, which evaluate the digital experiences of firms that serve end customers.

Our Age of the Customer Research offering, which combines our Business Technology (BT) and Marketing and Strategy (M&S) Research offerings, is closely aligned with our strategy of addressing our clients' and prospects' opportunities and challenges in the Age of the Customer. In addition to the Age of the Customer Research offering, our various Research offerings include standalone BT Research and M&S Research, as well as our TI (Technology Industry) Research offering designed specifically for technology vendors. Each of our Research offerings consists of a library of cross-linked documents that interconnect our playbooks, reports, data, product rankings, best practices, evaluation tools, and research archives. Research access is provided through role-based websites that facilitate client access to research and tools that are most relevant to their professional roles, including community tools that allow interaction between and among clients and our analysts.

### ***Research Methodology***

We employ a structured methodology in our research that enables us to identify and analyze business technology trends, markets, and audiences and ensures consistent research quality and recommendations across all coverage areas. We ascertain the issues important to our clients and prospects through thousands of interactions and surveys with technology vendors and business, marketing, and technology professionals, and accordingly, the majority of our research is focused on helping our clients increase their customer focus and grow their business. We use the following primary research inputs:



- Our own proprietary data from our CX Index™, Consumer Technographics®, Business Technographics, and ForecastView products.
- Confidential interviews with early adopters and mainstream users of new technologies across technology, marketing, and strategy roles at end-user companies.
- In-depth interviews with business technology vendors and suppliers of related services.
- Ongoing briefings with vendors to review current positions and future directions.
- Continuous dialogue with our clients to identify business and technology opportunities in the marketplace.

Collaboration among research, product, data and consulting professionals is an integral part of our process, leading to higher-quality research and a unified perspective. Our global research and product organization supports our client base by facilitating research and product collaboration and quality, promoting a uniform client experience and improved customer satisfaction, and encouraging innovation.

Clients subscribing to our Research offerings may choose between two membership levels:

- **Member Licenses.** Member Licenses include access to the written research, as well as Inquiry with analysts, and access to Forrester Webinars. Inquiry enables clients to contact our analysts for quick feedback on projects they may have underway, to discuss ideas and models in the research, or for answers to questions about unfolding industry events. Typically, Inquiry sessions are 30-minute phone calls, scheduled upon client request, or e-mail responses coordinated through our research specialists. Forrester Webinars are Web-based conferences on selected topics of interest to particular professional roles that typically are held several times a week.
- **Reader Licenses.** Reader Licenses provide access to our written research.

Both Member and Reader clients receive access to our Customer Success Specialists, who provide additional information about our research, methodologies, coverage areas, and sources. The Customer Success Specialists are available to help clients navigate our website, find relevant information, and put clients in contact with the appropriate analyst for inquiries. Clients that subscribe for one or more Member licenses receive one ticket per order to attend a Forrester Event.

We also offer Research Share licenses that allow clients to share a designated number of published pieces of research with a designated number of persons within their organizations.

### ***Forrester Connect***

The Forrester Connect offerings are designed to help clients connect with peers and Forrester's professionals, optimize use of our products and services, and to coach executives to lead far-reaching change within their organizations.



### ***Leadership Boards***

Our Leadership Boards are exclusive peer groups for executives and other senior leaders at large organizations worldwide. Clients may participate in one or more Leadership Boards. Memberships are available to the Chief Information Officer (CIO) Group, the Chief Marketing Officer (CMO) Group and several Councils for the technology and marketing roles we cover. In addition to a Member license to access the appropriate Research offering, members of our Leadership Boards receive access to the following:

- A private forum for members to test their thinking with peers through local and national meetings, one-to-one and group peer exchanges, and virtual community activities.
- Advisors to challenge members' thinking with insights drawn from peers, our Research, and our analyst community, all designed to help members drive business growth and lead change.
- Member-generated content that includes next and best practices as well as role-specific maturity benchmark data.
- An event ticket to attend one Forrester Event.

### ***Executive Programs***

Our Executive Programs provide CMOs and CIOs with personal coaches who help the executives and their teams establish and tackle their most important initiatives. In addition to a Member license for our research offering and one ticket to attend a Forrester Event, our Executive Programs provide on-site strategy workshops, personalized research and analysis, access to Forrester experts, and custom data analytics to help executives understand and anticipate customer behavior.

### ***Forrester Analytics***

Our Analytics products and services are designed to provide fact-based customer insights to our clients. Clients can leverage our Analytics products and services or choose to have us conduct custom data analysis on their behalf. Our Analytics products and services include:

- ***Forrester's Customer Experience (CX) Index.*** The CX Index, which uses Forrester's rigorous customer experience methodology, is a framework for assessing and measuring the quality of customer experience for nearly 700 brands worldwide. This unique framework provides useful and actionable analysis including a customer experience score, quantitative information about the score, and the most important drivers to improve the customer experience, along with a Business Impact Simulator tool that models out potential revenue uplift to help guide clients' investments in customer experience. We offer two Forrester CX Index packages, consisting of an industry package that provides a benchmark of a particular brand's CX Index scores against its competitors and an add-on best-in-class package that offers deep insights on what distinguishes leading brands. For brands not included in our standard offering, we offer a custom survey approach to build out a CX Index score and deliver our insight recommendations. We deliver the CX Index through an easy-to-use interactive platform that allows clients to customize their CX data based on business needs.
- ***Consumer Technographics.*** Consumer Technographics is an ongoing quantitative research program, based on surveys of over 400,000 individuals in North America, Europe, Asia Pacific, and Latin America. Marketing and strategy professionals rely on our Consumer Technographics data and



analysis for unique insights into how technology impacts their customers' purchase journey, including the way consumers select, purchase, use, and communicate about products and services. We combine respondent data sets from our Consumer Technographics surveys into multiple regional and industry offerings. In 2017, we began delivering Consumer Technographics through an interactive platform that provides access to the data, insights and analytic tools. Additionally, clients may have access to a Technographics data insights manager to help them use the data effectively to meet their specific business needs.

- **ForecastView.** ForecastView is an ongoing data program that provides a detailed evaluation of market size, based on expert analysis and quantitative insights from our consumer and business surveys. We leverage Technographics demand-side data and supply-side metrics to help clients uncover new business opportunities. Each forecast consists of at least ten years of data: five historic, the current year and four years in the future. We offer global forecasts for e-commerce, digital marketing, mobile applications and platforms markets. ForecastView clients may also have access to ForecastView analysts to assist in utilizing appropriate data to support client business decisions.

### ***Forrester Consulting***

Our advisory and project consulting services leverage our Research, Technographics and CX Index data, as well as our proprietary consulting frameworks, to deliver focused insights and recommendations that assist clients with their challenges in developing and executing technology and business strategy, including customer experience and digital strategy, informing critical decisions and reducing business risk. Our consulting services help clients with challenges addressed in our published research, such as leading customer experience transformations, digital business transformation, and business technology transformations and modernization. We help business and technology professionals conduct maturity assessments, prioritize best practices, develop strategies, build business cases, select technology vendors, and structure organizations. We help marketing professionals at technology vendors develop content marketing strategies, create content marketing collateral, and develop sales tools. We have a dedicated consulting organization to provide professional project consulting services to our clients, utilizing our Forrester Solutions framework and best in class consulting techniques and content development tools, allowing our analysts to spend additional time on writing research and providing shorter-term advisory services.

### ***Forrester Events***

We host multiple events in various locations in North America, Europe and Asia throughout the year. Events bring together executives and other participants serving or interested in the particular subject matter or professional role(s) on which an event focuses. Event participants come together to network with their peers, meet with Forrester analysts, and hear business leaders discuss business and technology issues of interest or significance to the professionals in attendance. Forrester Events focus on business imperatives of significant interest to our clients, including succeeding in the Age of the Customer, customer experience, digital transformation, privacy and security, new technology and innovation, and marketing leadership, and provide immersive experiences to challenge clients' thinking and help clients to lead change.



#### 4. Ordering Officer Responsibilities

- a. Ordering is decentralized. Only U.S. Government Contracting Officers, Government Purchase Card Holders, or Contractors given FAR 51 Authorization are able to place orders against this EA.
- b. This EA was established competitively using the procedures under FAR 8.405-3. Refer to the DoD ESI website at [www.esi.mil](http://www.esi.mil) for the listing of the multiple award vendors.
- c. The Ordering office must:
  - i. Comply with the ordering procedures of FAR 8.4 and DFARS 208.4;
  - ii. Obtain competition and/or execute and publish a brand name or limited source justification as applicable;
  - iii. Provide fair opportunity to all EA holders who offer the applicable product and/or service required;
  - iv. Ensure compliance with all fiscal laws prior to issuing an order under the EA;
  - v. Incorporate into the order any regulatory and statutory requirements that are applicable to the agency for which the order is placed, if pertinent requirements are not already included in the EA; [Note: The FAR and DFARS clauses listed in Attachment 1 of the EA are those in effect as of the effective date of the EA. Ordering Officers are responsible for incorporating the most current version of the applicable FAR and DFARS clauses, at the ordering level, in the Delivery Order as appropriate]
  - vi. Obtain the required authorization to acquire the products or services through the DoD ESI EA in accordance with FAR Part 51 when a contractor is ordering on behalf of a DoD component;
  - vii. Ensure the vendor selected for the order represents the best value. (Note that the EA terms encourage spot discounting.);
  - viii. Review the license terms and conditions when ordering software or proprietary appliances provided in the EA Attachments. If required, ordering offices may secure additional terms and conditions at the Order level if those terms and conditions do not conflict with those at the EA level and represent best value to the Government.

#### 5. Ordering Process

- a. DFARS Regulation 208.74
  - i. DFARS 208.74 requires authorized software buyers and requiring officials to review the DoD ESI website for DoD inventory or availability of an existing DoD ESI agreement before pursuing another acquisition method. DFARS procedures are:
    1. After requirements are determined, review the information at the DoD ESI website to determine if the required product is available from DoD inventory. This can be done by visiting the DoD ESI website at [www.esi.mil](http://www.esi.mil) and selecting the "Agreements" tab. Choose the type of agreement for



the product being ordered (Software, Hardware, Services or All) and check the inventory box. A list of EAs with DoD inventory will appear. If the product being ordered is on the list, the EA must be used to procure the product.

2. If the required commercial products or services are not available from inventory, but are available from an EA, buyers must follow the procedures in the DFARS Section 208.74 and DFARS PGI 208.7403.
3. If a DoD component must obtain the commercial products or services outside the DoD ESI EA, the component must seek a waiver from a management official designated by the DoD Component. After the steps in paragraphs (5)(i) and (5)(ii)(A) of the DFARS PGI 208.7403, Acquisition procedures have been completed.
4. If the required commercial products or services are not available from inventory or from an EA, the DoD component may use an alternate method of acquisition, subject to applicable laws and policy.

b. Ordering

- i. All orders must be competed amongst the EA Holders unless an exception applies (see FAR 8.405-6 Limiting Sources).
- ii. Orders are subject to the ordering office's local policy, the underlying Governmentwide Acquisition Contract (GWAC), if used, and the terms of the EA. The order may be placed directly with the vendor after ensuring compliance with the Ordering Officer Responsibilities specified in Section 4. The following is needed to place an order:
  1. Execution of a delivery order (SF1449) by the respective local contracting office:
    - A. Contracting Officers will need to create a EA shell using their respective contract writing system in order to execute delivery orders against this EA (see section 7).
    - B. If the Contracting Officer does not use an automated contract writing system, enter the EA number N66001-19-A-0050 in Block 2 and a locally assigned delivery order number in Block 4. Note: Ensure you complete the FPDS-NG report.
  2. Open Market items (i.e. not in the EA catalog) may be added to a EA call/delivery order for quoting purposes and shall be clearly labeled on the Quote as "Open Market". The following actions apply for Open Market items:
    - A. For Open Market items under the Micro-purchase threshold, an ordering officer may add this item to an individual EA call/delivery order without following the procedures in FAR 8.402(f). The items must be clearly labeled "OPEN MARKET" on the Order.
    - B. For Open Market items over the Micro-purchase threshold, the ordering officer will need to purchase the item(s) outside of the EA as a separate order using FAR and DFARS procedures as applicable to their purchase. The ordering activity will need to abide by FAR Parts 5 (Publicizing), Part 6 (Competition Requirements), Part 12, (acquisition of commercial items),



Parts 13, 14, and 15 (contracting methods), and Part 19 (Small Business Program).

C. The completed SF1449 will be forwarded to the contractor with the following information:

Contractor / Vendor Information

Address: 60 Acorn Park Dr.  
Cambridge, MA 02140

Remit To: 25304 Network Place  
Chicago, IL 60673-1253

CAGE: 1W0J5

DUNS: 10-6765-928

TIN: 04-2797-789

Business Size: Large

D. A copy of the SF1449 must be sent to the servicing DFAS center.

3. Government-Wide Purchase Card orders can be submitted via telephone or the vendor's website

A. Orders can be placed by calling 703-584-2636 (alt. 703-584-2628) or [www.forrester.com](http://www.forrester.com).

B. Information Required from the Ordering Office:

- i. End User and Name
- ii. End User Email Address
- iii. End User Phone Number

iii. Ordering Period – If orders issued within the EA Ordering Period(s) include options, the order options may be exercised after the EA ordering date(s) provided that:

- 1. The initial order that includes the option was issued during the EA ordering period(s), and does not exceed 60 months past the expiration date of the EA;
- 2. The Ordering Office determines that the underlying GWAC is still valid at the time the order option is exercised and still includes the applicable products, and
- 3. The Ordering Office satisfies all other applicable regulations for exercise of the option.



**6. Points of Contact**

a. Contracting Office

	<b>Procuring Contracting Officer (PCO)</b>	<b>Contract Specialist</b>
<b>POC</b>	Spencer Sessions	Ian Manahan
<b>Telephone</b>	619-553-4523	619-553-3841
<b>Email</b>	spencer.sessions@navy.mil	ian.manahan@navy.mil

b. Software Product Manager (SPM)

	<b>Software Product Manager (SPM)</b>	<b>Alternate Point of Contact</b>
<b>POC</b>	John Bojorquez	Nick Thomas
<b>Telephone</b>	619-553-2849	619-553-6918
<b>Email</b>	john.bojorquez1@navy.mil	nicholas.a.thomas2@navy.mil

c. Vendor Points of Contact

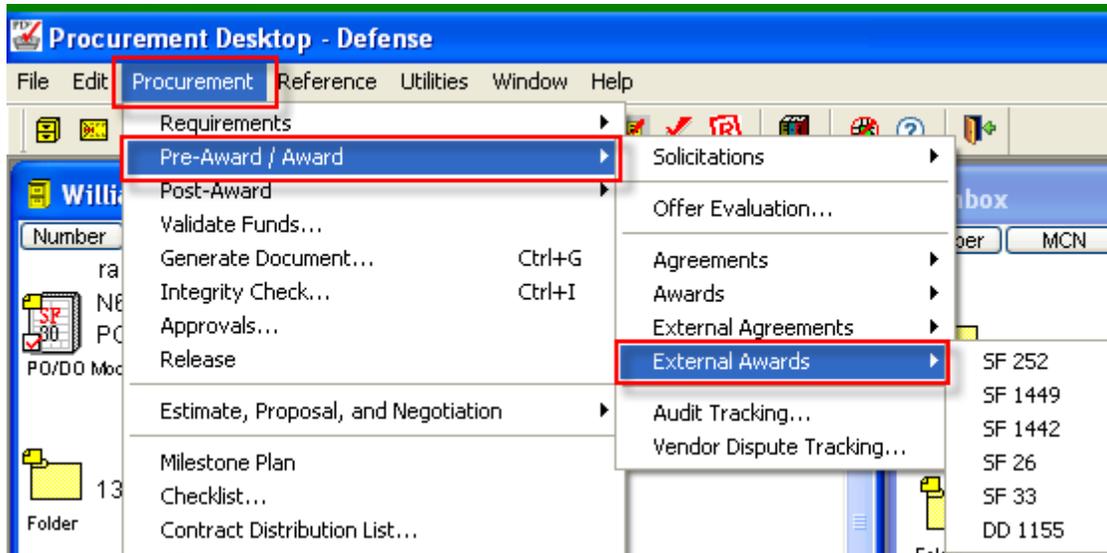
	<b>Program Manager (PM)</b>	<b>PM Alternate</b>	<b>Contracts Management</b>	<b>Sales &amp; Ordering</b>
<b>POC</b>	Rob Brady	Chris Olszewski	Rob Brady	Chris Olszewski
<b>Telephone</b>	703-584-2628	703-584-2636	703-584-2628	703-584-2636
<b>Email</b>	rbrady@forrester.com	colszewski@forrester.com	rbrady@forrester.com	colszewski@forrester.com

**7. External Award / Agreement (for use in the Standard Procurement System (SPS))**

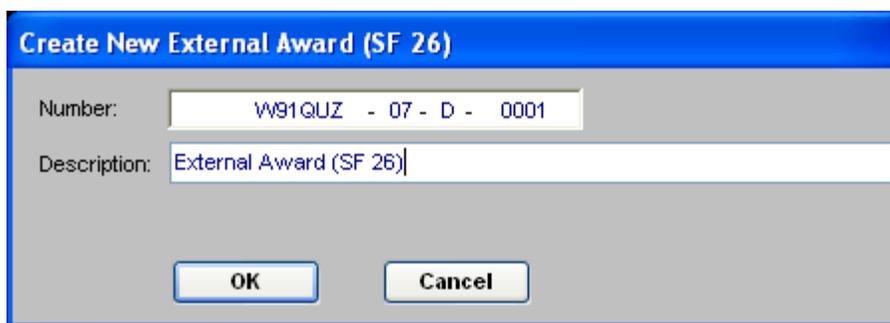
Blanket Purchase Agreements awarded by other contracting offices can be entered in the system as external awards. External awards allow users to enter line item information and establish order constraints consistent

with the original award. Once an external award is loaded in the system, it can be used as a reference when creating orders.

To create an external award, go to Procurement > Pre-Award / Award > External Awards (or Agreements) > select the desired form.



The Create New External Award window displays.



Enter the Agreement number for which the external award is being created. Click OK. The external award document is opened and displayed.



## Ordering Guide

**External Award (SF 26) - W91QUZ-07-D-0001**

Items 1 - 12 | Items 13 - 16 | Items 17 - 21 | BPA Items | Clauses

<b>EXTERNAL AWARD</b>	1. AWARD TYPE SF 26	2. DPAS RATING <input type="text"/>	3. EFFECTIVE DATE <input type="text"/>	4. DATE OF CONTRACT <input type="text"/>
5. CONTRACT (Proc. Inst. Ident.) NO. W91QUZ-07-D-0001		6. REQUISITION/PURCHASE REQUEST/PROJECT NO.		
7. ISSUED BY CODE: <input type="text"/>		8. ADMINISTERED BY CODE: <input type="text"/> (if other than 7) <b>See Item 7</b>		
9. NAME AND ADDRESS OF CONTRACTOR CODE: <input type="text"/>		10. DELIVERY [ <input type="radio"/> ] FOB ORIGIN [ <input type="radio"/> ] OTHER <small>(See below)</small>		
		11. DISCOUNT FOR PROMPT PAYMENT <input type="text"/>		
		12. SUBMIT INVOICES Submit <input type="text"/> copies to the address shown in:		

Details... Add

Enter all relevant information on the tabs to replicate the award that the external award is representing. You must create CLINs for external awards in order to issue orders off of those CLINs. Agreements do not utilize CLINs. It is not necessary to replicate clauses.

When complete, simply approve the external award. This document type is not run through funds validation, not generated, and not released.