



Kate Leggett

VP,
Principal
Analyst
Serving
**Application
Development
&
Delivery
Professionals**

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Kate
serves
Application
Development
&
Delivery
Professionals.
She
is
a
leading
expert
on
customer
relationship
management
(CRM)
and
customer

service
strategies,
maturity,
benchmarking,
governance,
and
ROI.
She
is
an
accomplished
public
speaker
and
frequently
presents
at
industry
events
such
as
CRM
Evolution.
She
has
been
published
in
The
Wall
Street
Journal,
Forbes
magazine,
and
industry
publications
such
as
CRM
Magazine,
KM
World,
and
Destination

CRM.

**Previous
Work
Experience**

Kate
has
extensive
industry
experience,
with
more
than
10
years
of
leadership
at
CRM
and
customer
service
software
companies,
where
she
held
senior
product
marketing
and
product
management
roles.
She
is
also
a
published
author
on
customer
service
trends
and

best
practices.

Education

Kate
earned
a
Bachelor
of
Science
from
the
University
of
Toronto
and
a
Master
of
Science
from
the
University
of
Pennsylvania.

Kate Leggett's Research

- **REPORT:** [Mitigate CRM Risks With Sound Deployment Practices](#)

Processes: The CRM Playbook

May 15, 2018 Kate Leggett

To succeed in the age of the customer, application development and delivery (AD&D) professionals who support front-office business processes cannot afford failed technology projects. Customer relationship management (CRM) projects can be costly, affect many employees, and suffer from a lack of vendor support. Based on a survey of 221 business and tech organization professionals, this report helps AD&D professionals determine how to organize their solution deployment, recognize the risks they face, and avoid pitfalls. This is an update of a previously published report; Forrester reviews and updates it periodically for continued relevance and accuracy.

- **REPORT:** [Quantify The Business Value Of CRM](#)

Business Case: The CRM Playbook

May 9, 2018 Kate Leggett, [John Bruno](#)

CRM initiatives must not only be technically sound but must also answer the question, "What will we get for our money?" This report describes how application development and delivery (AD&D) professionals can apply Forrester's Total Economic Impact™ (TEI) methodology to address four critical questions in their CRM plans: What are the business benefits? What will it cost? Will it increase future flexibility? How will we mitigate risks? Start by comparing your project against Forrester's benefit and cost benchmarks. This is an update of a previously published report; Forrester reviews and updates it periodically for continued relevance and accuracy.

- **REPORT: [Map The Way To Your CRM Business Outcomes](#)**

Road Map: The CRM Playbook

May 4, 2018 Kate Leggett

When application development and delivery (AD&D) professionals create a CRM road map, they need to evaluate alternative CRM tactics, leverage synergies between initiatives, slot each new initiative into a schedule, and dedicate resources to the highest-value opportunities. This report describes how to build a road map that will allow you to realize economic value from your CRM implementation more quickly and with less risk. This is an update of a previously published report; Forrester reviews and updates it periodically for continued relevance and accuracy.

- **REPORT: [CRM Success Hinges On Effective Change Management](#)**

Continuous Improvement: The CRM Playbook

March 23, 2018 [John Bruno](#), Kate Leggett

There's too much at stake for your CRM initiative to fail. CRM success depends on adoption, and failure results in underutilized investment and unmet business objectives that can put your revenue and profitability at stake. Driving adoption needs to be a top priority of any application development and delivery (AD&D) pro's CRM initiative, and getting there requires skills and resources to drive effective change management. This report defines the change management tactics that will make your project a success. This is an update of a previously published report; Forrester reviews and updates it periodically for continued relevance and accuracy.

- **REPORT: [Win Funding For Your Customer Service Project](#)**

Business Case: The Contact Centers For Customer Service Playbook

March 19, 2018 [Ian Jacobs](#), Kate Leggett

In the age of the customer, customer service must be a cornerstone of a company's customer experience (CX) strategy. Customer service application pros must invest in modernizing their technology. Doing so requires a sound business case. This report, part of Forrester's contact centers for customer service playbook, addresses the four questions every business case must answer: What are the business benefits? What is the impact on project costs? How will future initiatives benefit from this project? And how will we mitigate risks? This is an update of a previously published report; Forrester reviews and updates it periodically for continued relevance and accuracy. For this version, we've added new data and examples.

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