TechTarget 2009
Media Consumption Benchmark Report 2:

Closing the

GAP

Between IT Buyers and IT Marketers

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Table of Contents

Key Findings

Executive Summary

Results of the 2009 benchmark media consumption study demonstrate that overall the gaps we saw between marketers and IT buyers in 2008 related to online media consumption have definitely tightened.

Generally, marketer's supply of media and content types has become better at meeting the demands and interests of the buyer community. Marketers seem to have a better understanding of how to produce some of the "newer" media and are doing better in keeping up with the IT buyers' interests, especially related to production quality and lengths of videos as well as their gravitation toward social communities, blogs and forums.

The exception to this is vendor comparisons. Marketers hesitate to offer comparative literature on their solutions, yet IT buyers want them, especially when they are in the final stages of their buying process and have narrowed the competitive set to a short list of vendors. In a recent Google/TechTarget study the IT community also made it clear that in end stage they are looking for this type of content but there is a lack of it, forcing them to create comparisons on their own.

Marketers appear reluctant to take the risk associated with comparing their solution to competitors, but IT buyers in the final stages of evaluation want this type of information so to make more informed and faster purchase decisions. Especially in recessionary times, this last point is extremely important to them.

On the social media front, it is apparent that both audiences favor use of IT and social online communities for research/sponsorship in early stages of the cycle; however they do frequent/use all communities throughout the buying cycle. Marketers strive to influence, if not direct, conversations in those venues and IT buyers seek out their peers' opinions in these communities.

The greatest disconnect in this area reflects that whereas over half the sample of IT buyers say they frequent IT publisher communities such as TechTarget's
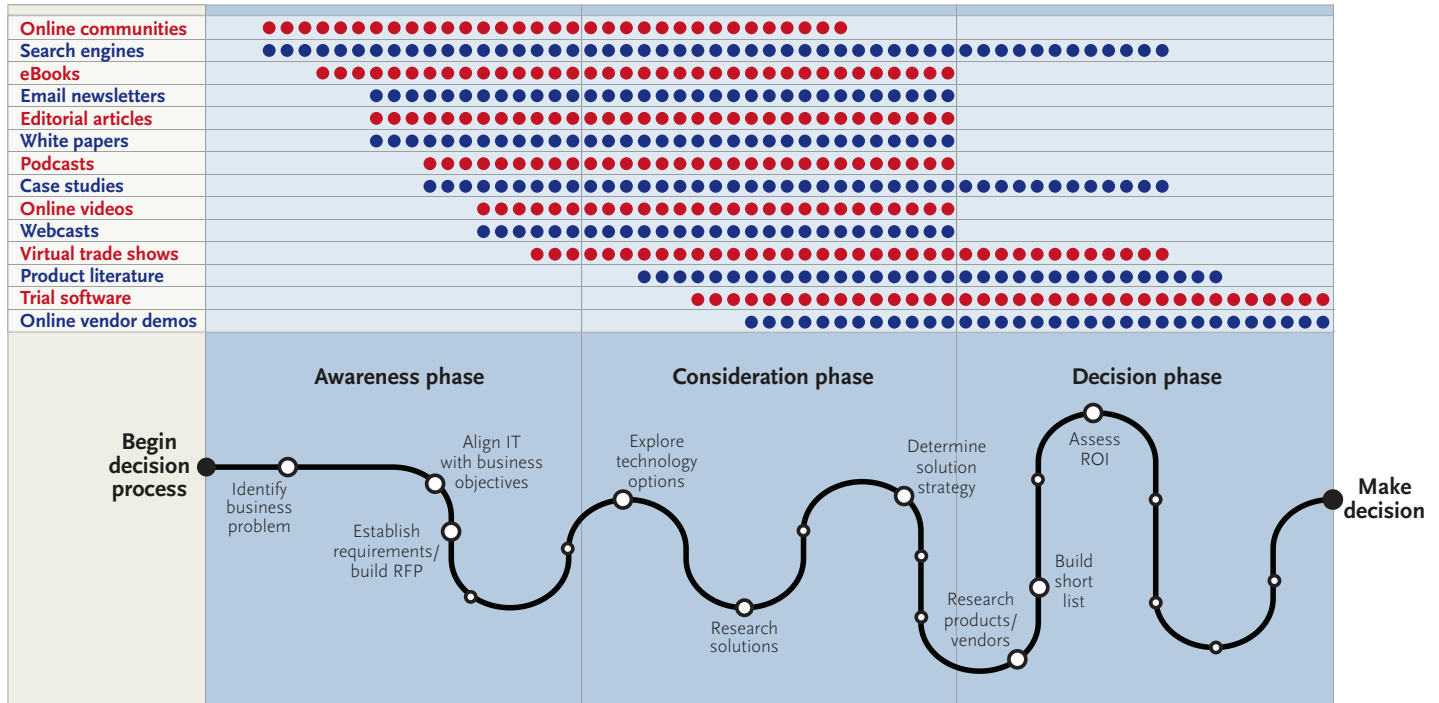
Key Findings (continued)

IT Knowledge Exchange (ITKE), very few marketers report using these environments to market their products or sponsor relevant conversations. Currently, marketers are investing more resources in social communities like Twitter and LinkedIn. Comparatively, IT buyers show dramatically less involvement with those sites at this time.

In restrospect, this benchmark research study compared to one fielded just over a year ago, indicates that marketers are better at meeting IT buyers interests around online media consumption. It could be that marketers are paying more attention to what their target audience consumes, as they realize getting this right translates into better ROI. IT could also be a reflection of how much more sophisticated B to B marketers are becoming as it relates to digital media planning and performance of specific media types over others, based on their actual campaign experiences. It makes sense that as online marketing demands evolve, so do the marketers supplying the media, to meet this demand.

Other highlights of the study include:

- Marketers have increased their output of trial software (35%) but still not kept up with demand; (54%) of IT buyers looking for them.

- Actual content of videos is more important than production quality for both groups (64%) of IT buyers vs (57%) for marketers

- Marketers have learned to shorten their videos based on IT preferences—with (47%) producing them under 5 minutes and 74% producing them under 10 minutes, the benchmark for prefered length by IT buyers.

- Majority of marketers think trial software downloaders take more than 2 weeks to evaluate, while IT buyers say one week or less is their typical evaluation period

- IT buyers spend less time in the early research phases (63% say less than one month) than marketers think they do—59% think it's up to six months.

IT buyers consume online media throughout the IT buying process favoring specific assets at specific times

Online communities
Search engines
eBooks
Email newsletters
Editorial articles
White papers
Podcasts
Case studies
Online videos
Webcasts
Virtual trade shows
Product literature
Trial software
Online vendor demos

Awareness phase

Consideration phase

Decision phase

Begin decision process

Identify business problem

Establish requirements/ build RFP

Align IT with business objectives

Explore technology options

Research solutions

Determine solution strategy

Research products/ vendors

Assess ROI

Build short list

Make decision

Research Analysis

IT buyers and marketers agree that the internet is the primary medium for information gathering, with nearly all IT buyers using it frequently, if not always. Also confirmed here, the research process is conducted by an entire IT research team, typically between 2 and 7, and marketers are focused on reaching all team members.

IT Buyers: How often do you use the internet to research information on technology solutions?
Marketers: How often do you believe IT professionals use the internet to research information
 on technology solutions?

	Always	Frequently	Sometimes	Never

				5%	
IT Buyers	64%	31%	5%	0%
Marketers	58%	39%	3%	0%
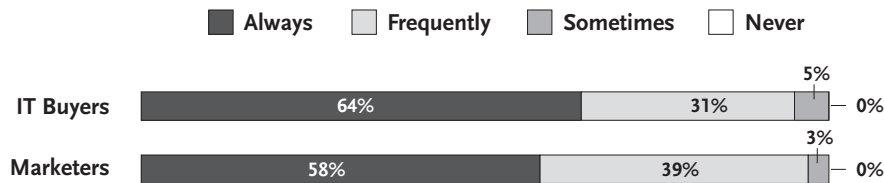
IT Buyers: Which of the following best describes your decision-making responsibility regarding
 technical solutions at your organization?
Marketers: Which of the following best describes the technology role you focus most of your
 marketing materials towards?

Member of decision making team	Strong influencer
Final decision-maker	Determine need	Product or vendor evaluator

	Member of decision making team	Strong influencer	Final decision-maker	Determine need	Product or vendor evaluator
IT Buyers	38%	23%	16%	12%	11%
Marketers	42%	20%	17%	11%	10%
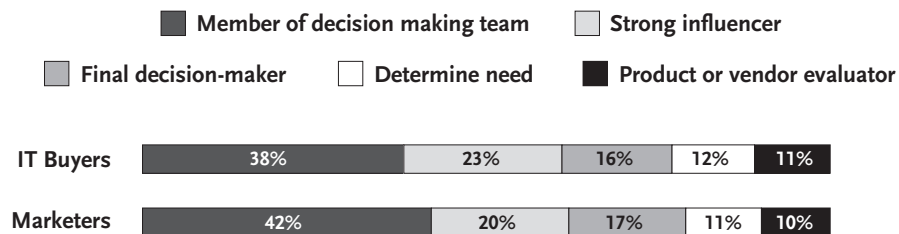
IT Buyers: **How many people are typically involved in the information technology research and decision-making process at your organization?**

Marketers: **How many people do you believe are involved in the information technology research and decision-making process for your solution at the organizations you market to?**

| ■ 1 | ☐ 2–4 | ▨ 5–7 | ☐ 8–10 | ■ More than 10 |

IT Buyers

4% 46% 22% 9% 19%

Marketers

1% 49% 29% 9% 12%
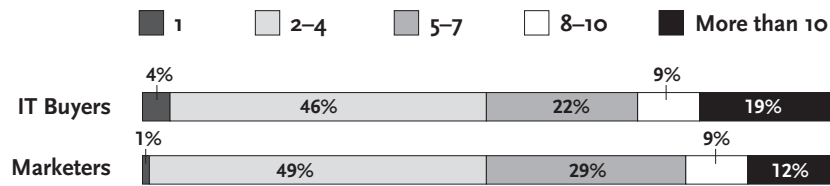
White papers, product literature and trial software are among the most utilized online content types by IT buyers. However, as stated earlier there is a large disconnect between the IT buyers' demand and the marketers' supply of vendor comparisons. Conversly, marketers spend more resources on customer case studies than IT buyers demand.
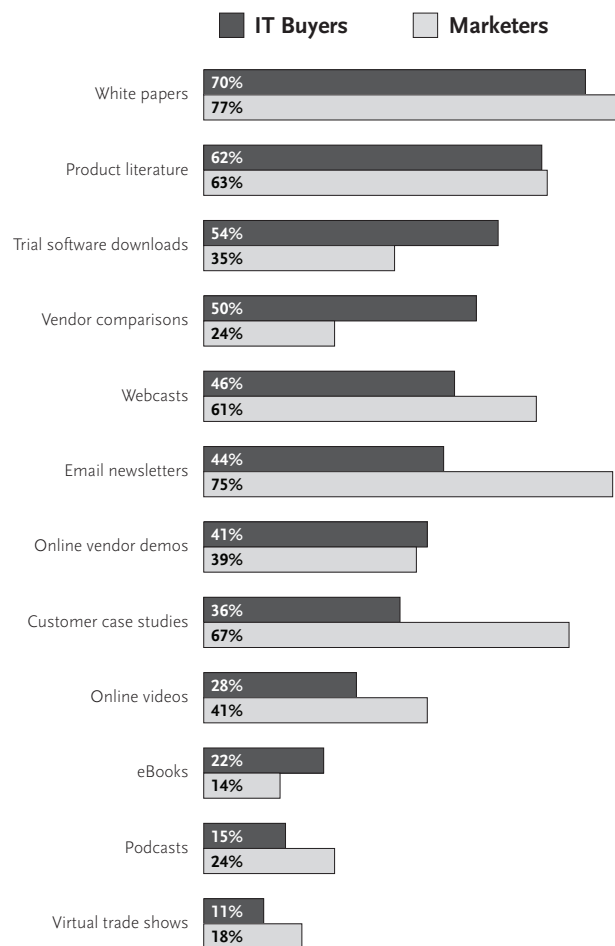
IT Buyers: **Which of the following online content types have you used to get information on enterprise technology solutions in the past three months?**

Marketers: **Which of the following online content types have you used in marketing to your IT buyer audience in the past three months?**

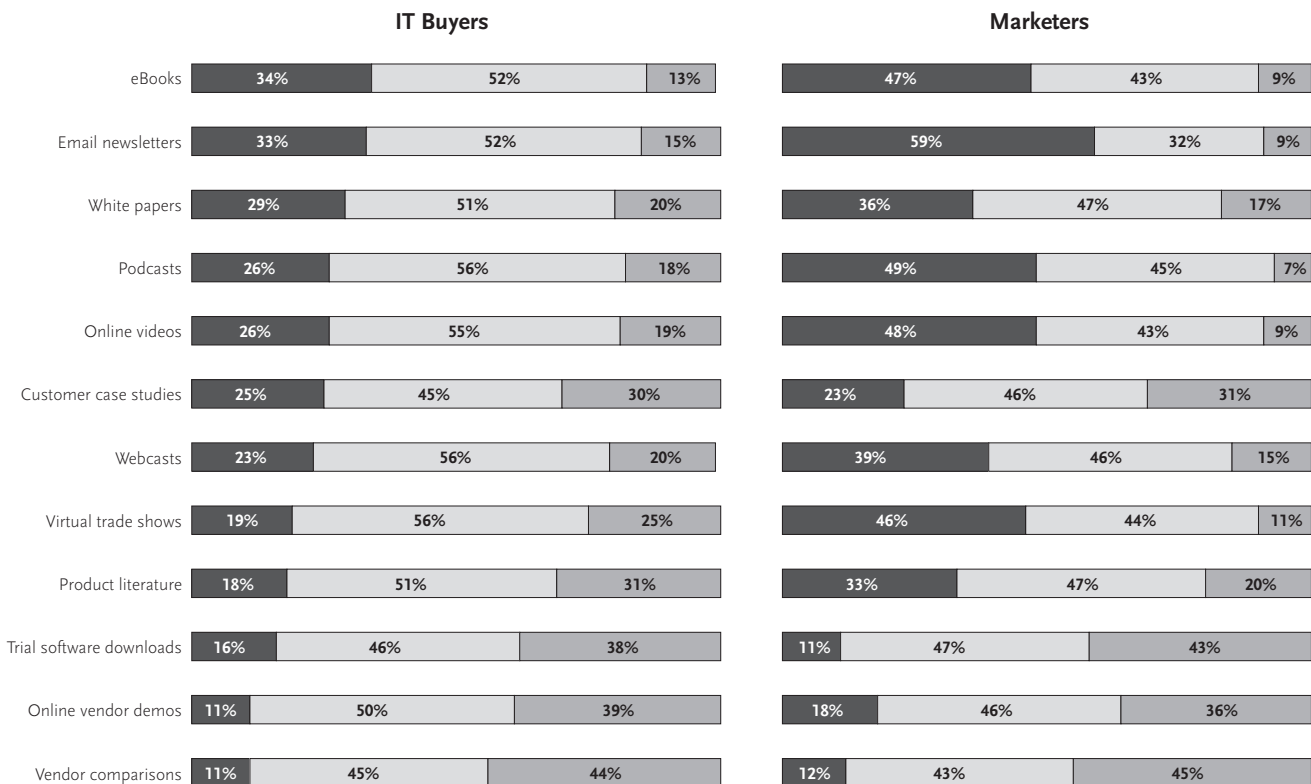| Content type	IT Buyers	Marketers
White papers	70%	77%
Product literature	62%	63%
Trial software downloads	54%	35%
Vendor comparisons	50%	24%
Webcasts	46%	61%
Email newsletters	44%	75%
Online vendor demos	41%	39%
Customer case studies	36%	67%
Online videos	28%	41%
eBooks	22%	14%
Podcasts	15%	24%
Virtual trade shows	11%	18%

While most content types are used throughout the IT buying process, trial software, vendor demos, case studies and comparisons are favored more towards the decision stage. However, marketers and IT buyers find email newsletters and ebooks to be especially useful during the awareness stage of the buying process.

IT Buyers: At which stage(s) of your buying process are these specific online content types most effective?

Marketers: How would you align these online content types with the stages of the IT buying process in terms of effectively reaching IT professionals?

█ Identifying an IT problem (Awareness)   **☐ Gathering technical information (Consideration)**   **▨ Making a vendor short list (Decision)**

IT Buyers

Content Type	Awareness	Consideration	Decision
eBooks	34%	52%	13%
Email newsletters	33%	52%	15%
White papers	29%	51%	20%
Podcasts	26%	56%	18%
Online videos	26%	55%	19%
Customer case studies	25%	45%	30%
Webcasts	23%	56%	20%
Virtual trade shows	19%	56%	25%
Product literature	18%	51%	31%
Trial software downloads	16%	46%	38%
Online vendor demos	11%	50%	39%
Vendor comparisons	11%	45%	44%

Marketers

Content Type	Awareness	Consideration	Decision
eBooks	47%	43%	9%
Email newsletters	59%	32%	9%
White papers	36%	47%	17%
Podcasts	49%	45%	7%
Online videos	48%	43%	9%
Customer case studies	23%	46%	31%
Webcasts	39%	46%	15%
Virtual trade shows	46%	44%	11%
Product literature	33%	47%	20%
Trial software downloads	11%	47%	43%
Online vendor demos	18%	46%	36%
Vendor comparisons	12%	43%	45%

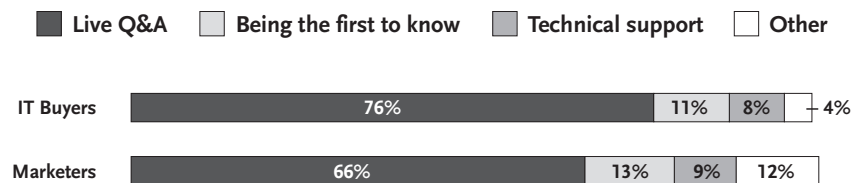As with previous studies, IT buyers and marketers are favoring the production of on-demand videos or webcasts over live ones. Those that *do* prefer live versions, enjoy participating in the live Q&A that are available.

IT Buyers: Do you have a preference for live or on-demand webcasts/online videos?
Marketers: Do you find that IT professionals have a preference for live or on-demand webcasts/online videos?

■ On-demand   □ No preference   ▣ Live

IT Buyers	58%	32%	10%
Marketers	38%	34%	28%
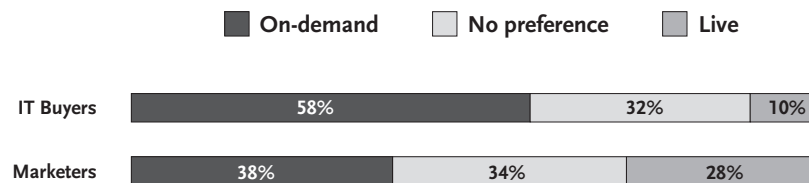
IT Buyers: Why do you prefer live webcasts/online videos over on-demand webcasts/online videos?
Marketers: What aspect of your live webcasts/online videos does your IT audience take advantage of the most?

■ Live Q&A   □ Being the first to know   ▣ Technical support   □ Other

|				
IT Buyers	76%	11%	8%	4%
Marketers	66%	13%	9%	12%

While the production quality of a video does affect the perception of the vendor, the content of the video has more overall importance than the usefulness of the video.

IT Buyers: Does the production or viewing quality of an online video impact your perception of the vendor?

Marketers: Do you believe that the production or viewing quality of your online videos impacts the perception of your brand?

■ **High quality production creates a positive perception of the vendor**

□ **Low quality production creates a negative perception of the vendor**

■ **The quality of production has no effect on the perception of the vendor**

IT Buyers	52%	26%	22%
Marketers	65%	20%	15%
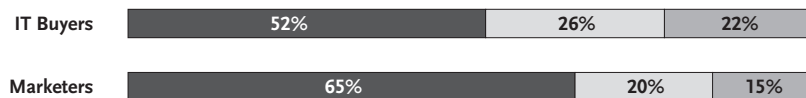
IT Buyers: Does the production or viewing quality of an online video impact the content's value to you?

Marketers: Do you believe that the production or viewing quality of your online videos impacts the value of the content delivered to your IT audience?

■ **Somewhat. I expect a minimum amount of production value to online videos**

□ **Absolutely, I only find online videos useful when they have a high production quality in addition to being relevant**

■ **Not at all. As long as the content is relevant**

IT Buyers	64%	18%	18%
Marketers	57%	29%	14%

IT buyers expect marketers to produce videos in their native language if they want to catch their attention. Also to hold the attention of IT buyers, videos need to be less than 20 minutes and preferably less than 10. Marketers seem to be on the same page with IT buyers here and are producing most of their videos to be 5 to 10 minutes long.

IT Buyers: Are you willing to watch an IT-related online video that is not in your native language?

■ Not at all. If a vendor wants me to watch their video then it should be produced in my native language as well

□ Absolutely, If I find the content useful then I have no problem reading subtitles

■ Somewhat. I'll watch a video in a different language but only if I have some spare time and the content is very useful to me

IT Buyers	48%	27%	25%

Marketers: Do you produce IT-related online videos to coincide with the native language of the country you are marketing to?

■ Not at all. We only produce one version of an IT-related online video

□ Absolutely. We produce all of our IT-related online videos to match the native language of the countries we are marketing it to

■ Sometimes. We'll produce IT-related online videos in multiple languages, but only for our most important content

Marketers	56%	12%	33%

IT Buyers: What is the best length for an IT-related online video?
Marketers: What length of an IT-related online video is best received by your audience?

■ Less than 5 minutes   □ 5–10 minutes   ■ 10–20 minutes   □ 20–30 minutes
■ More than 30 minutes   ■ Depends on video type

	8%				2%	
IT Buyers		33%	20%	17%		20%

				8%	5%	0%	
Marketers	47%		27%				13%
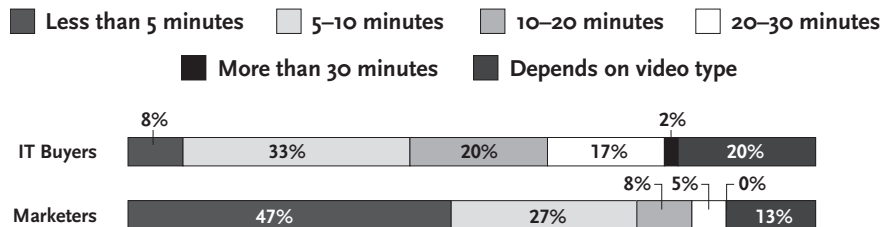
Most trial software is downloaded either straight from a vendor's website or through search engine results. During their evaluation process, IT buyers download 2 to 3 pieces of trial software, and generally evaluate them for more than a week. Although most IT buyers are downloading trial software that has a final cost of less than $25,000, there are some that are using trial software to evaluate products that could cost in upwards of more than $500,000. Once IT buyers have downloaded and evaluated the trial software, typically in less than 2 weeks, they are more likely to make a purchase from the trial software vendor.

IT Buyers: Which of the following websites do you visit to search for and download trial software during your research process?

Marketers: Which of the following websites do you currently use to market your trial software to IT professionals?

■ IT Buyers   □ Marketers

	IT Buyers	Marketers
IT vendor websites	80%	47%
Search engines	77%	80%
IT publisher websites	37%	22%
Download.com	37%	19%
Other	9%	9%
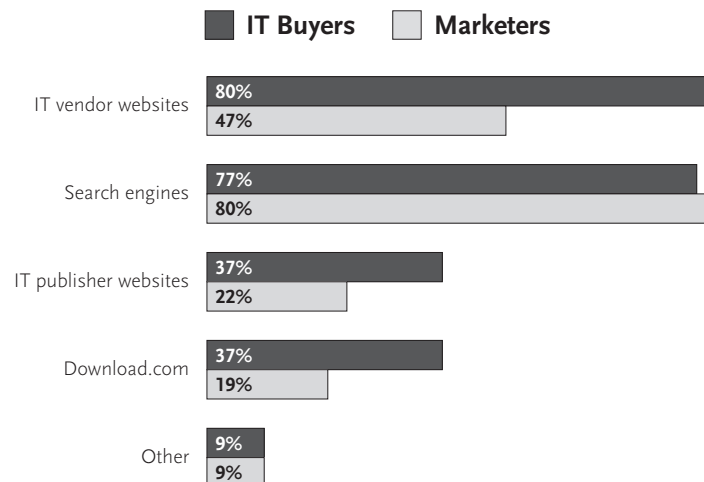
IT Buyers: How many different pieces of trial software will you install when evaluating a specific IT solution?

Marketers: How many different pieces of trial software do you believe an IT professional will install when evaluating a specific IT solution?

■ 1   ☐ 2–3   ▨ 4–5   ☐ More than 5

	1	2–3	4–5	More than 5
IT Buyers	6%	78%	13%	3%
Marketers	10%	81%	8%	1%
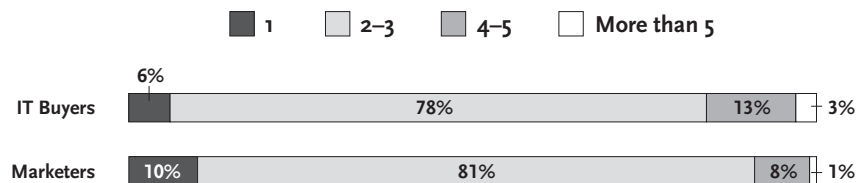
IT Buyers: What is the average cost of the software you are trialing?

Marketers: What is the cost of the software you have available as a trial download for IT professionals?

■ Less than $1,000   ☐ $1,000–$5,000   ▨ $5,000–$10,000   ☐ $10,000–$25,000   ■ $25,000–$50,000

☐ $50,000–$100,000   ▨ $100,000–$250,000   ☐ $250,000–$500,000   ☐ More than $500,000

	Less than $1,000	$1,000–$5,000	$5,000–$10,000	$10,000–$25,000	$25,000–$50,000	$50,000–$100,000	$100,000–$250,000	$250,000–$500,000	More than $500,000
IT Buyers	32%	30%	12%	9%	7%	5%	3%	1%	1%
Marketers	45%	21%	12%	10%	5%	4%	2%	1%	1%
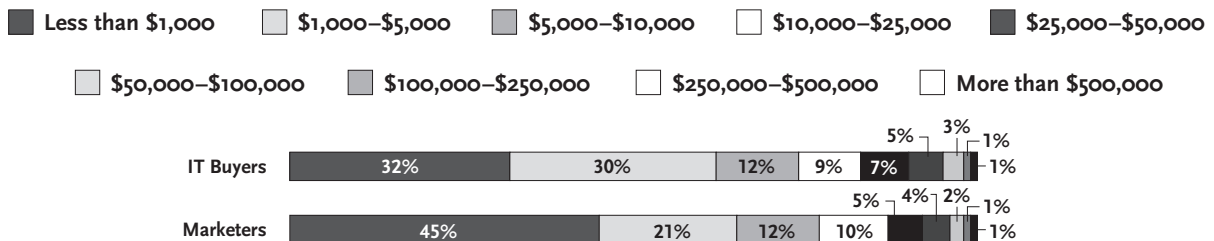
IT Buyers: How long do you spend actively using the trial software and evaluating the solution before making a purchase decision once the trial software is installed?

Marketers: How long do IT professionals typically spend actively using and evaluating your solution before making a purchase decision once your trial software is installed?

■ **Less than 1 day**   ▫ **1–2 days**   ▪ **2 days–1 week**   □ **1–2 weeks**   ■ **More than 2 weeks**

	Less than 1 day	1–2 days	2 days–1 week	1–2 weeks	More than 2 weeks
IT Buyers	4%	14%	27%	25%	31%
Marketers	3%	5%	19%	21%	53%
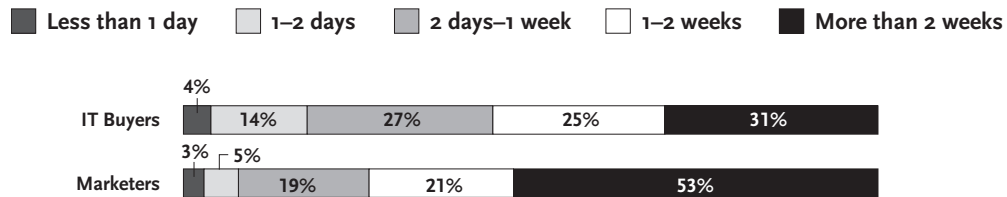
IT Buyers: How much more likely are you to purchase the solution after using the trial software?
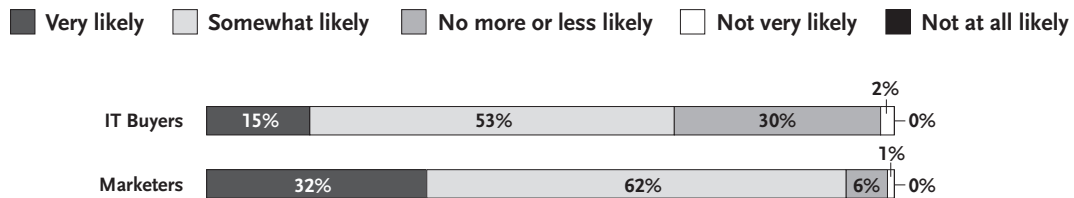
Marketers: How much more likely are IT professionals to purchase your solution after using your trial software?

■ **Very likely**   ▫ **Somewhat likely**   ▪ **No more or less likely**   □ **Not very likely**   ■ **Not at all likely**

	Very likely	Somewhat likely	No more or less likely	Not very likely	Not at all likely
IT Buyers	15%	53%	30%	2%	0%
Marketers	32%	62%	6%	1%	0%

Search engines remain the most used information source during the IT buying process. However, there seems to be a gap between the IT buyers' demand and the marketers' sponsorships when it comes to IT publishers' sites and online communities considered as viable information sources.

IT Buyers: **Where have you gone for information on enterprise technology solutions in the past three months?**

Marketers: **Which of the following have you used in marketing to your IT buyer audience in the past three months?**

■ IT Buyers   ☐ Marketers

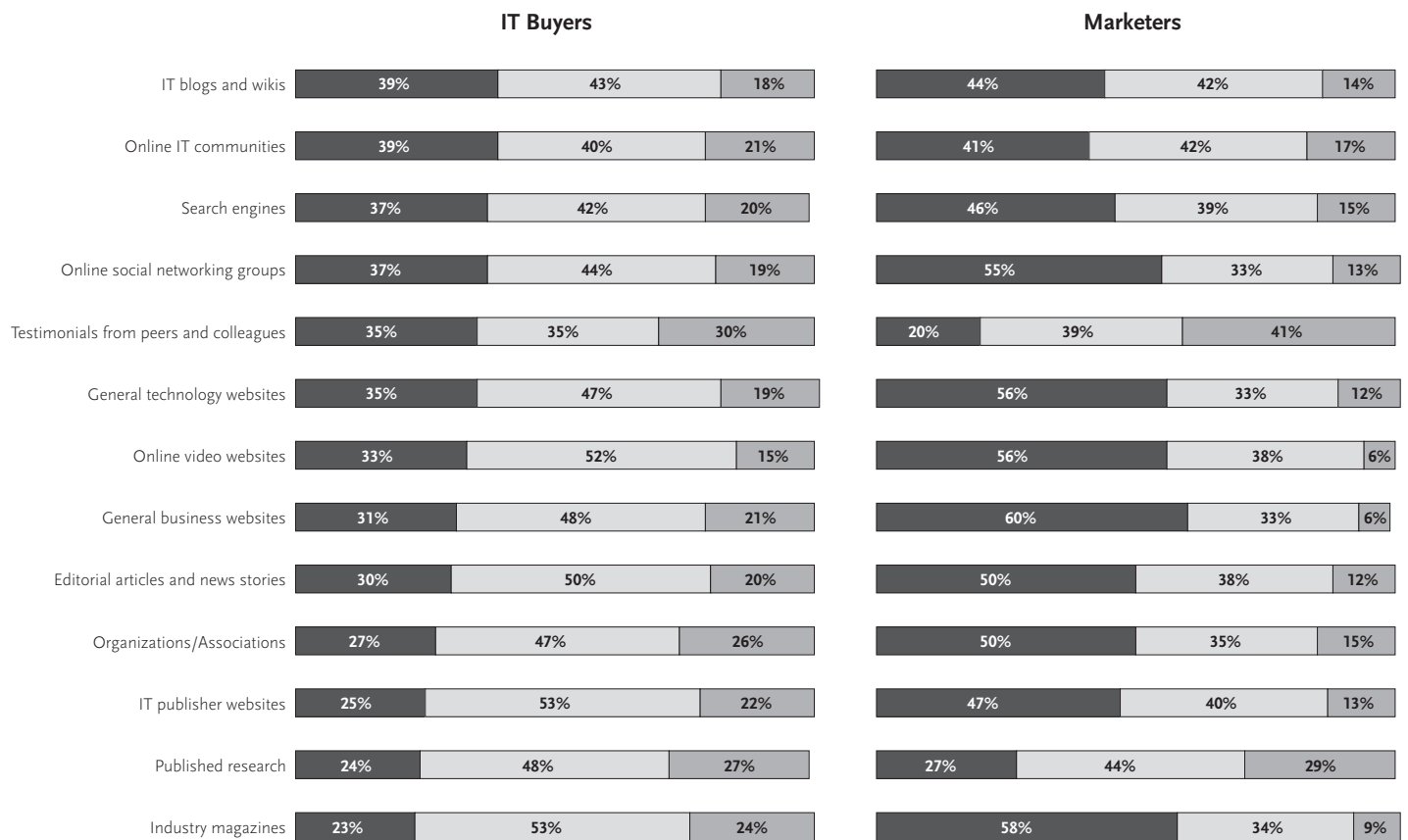| Source	IT Buyers	Marketers
Search engines	83%	76%
IT vendor websites	75%	93%
Testimonials from peers and collegues	65%	60%
IT publisher websites	64%	41%
Online IT communities	51%	27%
Published research	40%	40%
Editorial articles and news stories	40%	59%
Conferences/seminars/tradeshows	36%	71%
Organizations/Associations	29%	45%
Information from value-added resellers	27%	27%
General business websites	19%	18%
Online video websites	13%	35%
Online social networking groups	11%	59%

While most information sources are used throughout the IT buying process, vendor websites, information from resellers and peer testimonials are favored more towards the decision stage. However, marketers and IT buyers find that information from unbiased sources, like blogs, online communities and social networks, are more useful during the awareness and consideration stages of the buying process.

IT Buyers: **At which stage(s) of your buying process are these specific information sources most effective?**
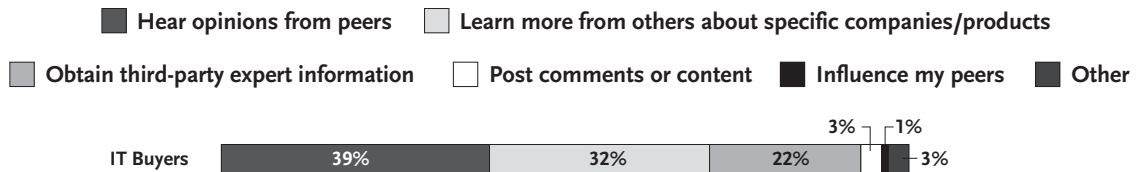
Marketers: **How would you align these information sources with the stages of the IT buying process in terms of effectively reaching IT professionals?**

■ **Identifying an IT problem (Awareness)**   □ **Gathering technical information (Consideration)**   ▨ **Making a vendor short list (Decision)**

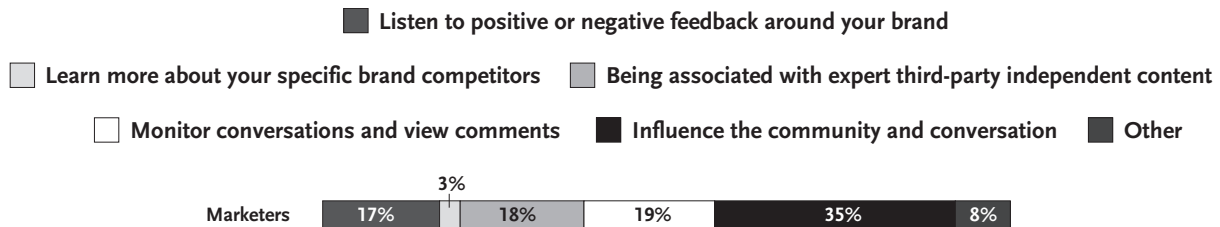|	IT Buyers			Marketers		
IT blogs and wikis	39%	43%	18%	44%	42%	14%
Online IT communities	39%	40%	21%	41%	42%	17%
Search engines	37%	42%	20%	46%	39%	15%
Online social networking groups	37%	44%	19%	55%	33%	13%
Testimonials from peers and colleagues	35%	35%	30%	20%	39%	41%
General technology websites	35%	47%	19%	56%	33%	12%
Online video websites	33%	52%	15%	56%	38%	6%
General business websites	31%	48%	21%	60%	33%	6%
Editorial articles and news stories	30%	50%	20%	50%	38%	12%
Organizations/Associations	27%	47%	26%	50%	35%	15%
IT publisher websites	25%	53%	22%	47%	40%	13%
Published research	24%	48%	27%	27%	44%	29%
Industry magazines	23%	53%	24%	58%	34%	9%

A majority of IT buyers that are using social communities are using them to listen to their peers' opinions about specific companies or products. However, Marketers are participating in these social communities to try to influence the direction of the conversations. The most popular social networking sites among IT buyers are Linkedin, YouTube and Facebook. More specifically, TechTarget's IT Knowledge Exchange and TechRepublic are the most used IT-specific social networking sites. Twitter is by far more popular with marketers than IT buyers.

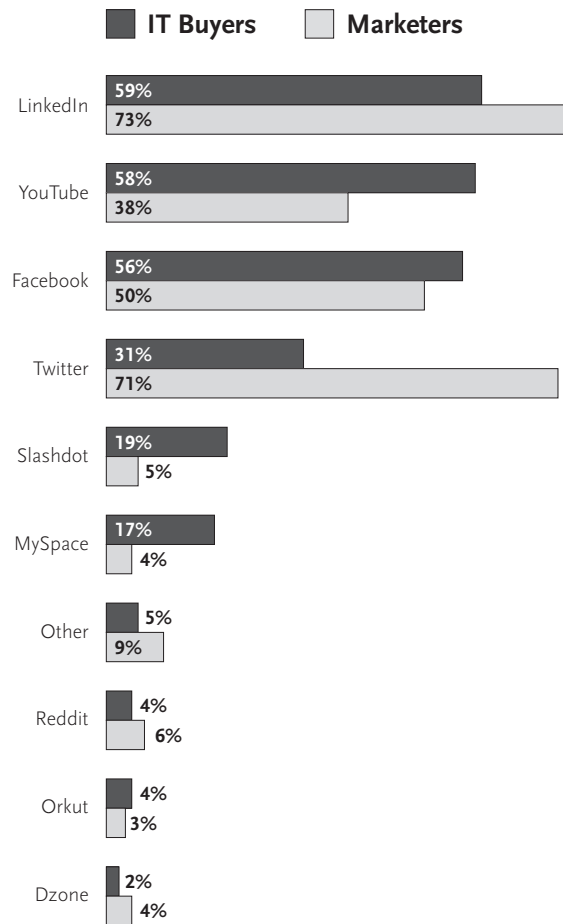*IT Buyers:* What is your primary objective of participating in online social communities?

- ■ Hear opinions from peers
- ▢ Learn more from others about specific companies/products
- ▢ Obtain third-party expert information
- □ Post comments or content
- ■ Influence my peers
- ■ Other

IT Buyers	39%	32%	22%	3%	1%	3%

Marketers: What is your primary objective in sponsoring or creating online social communities?

- ■ Listen to positive or negative feedback around your brand
- ▢ Learn more about your specific brand competitors
- ▢ Being associated with expert third-party independent content
- □ Monitor conversations and view comments
- ■ Influence the community and conversation
- ■ Other

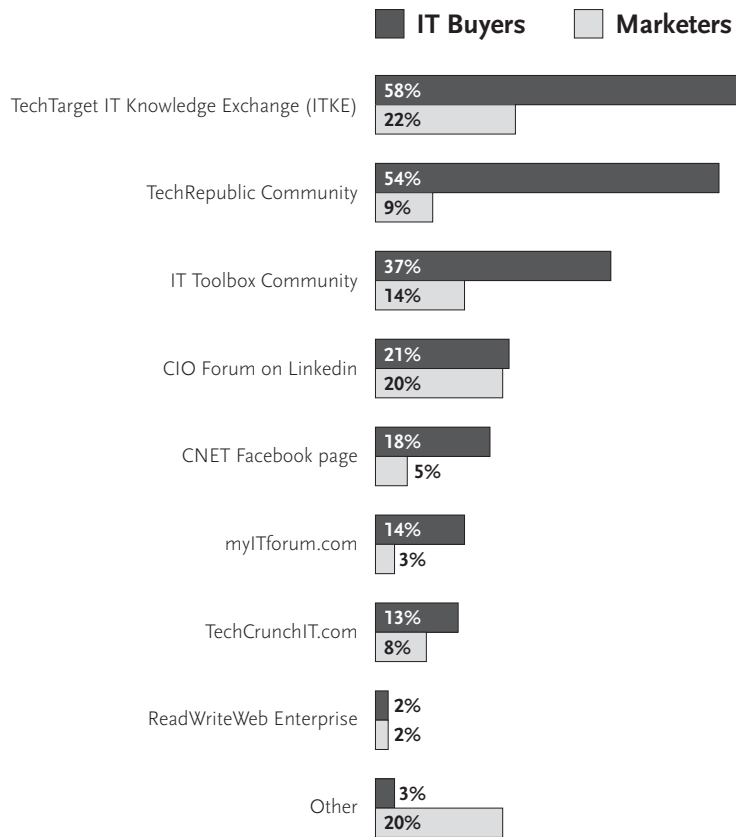| Marketers	17%	3%	18%	19%	35%	8%

IT Buyers: Which of the following general online social networking websites have you visited in the past three months?

Marketers: Which of the following general online social networking websites have you used to market to IT professionals in the past three months?

■ **IT Buyers**　□ **Marketers**

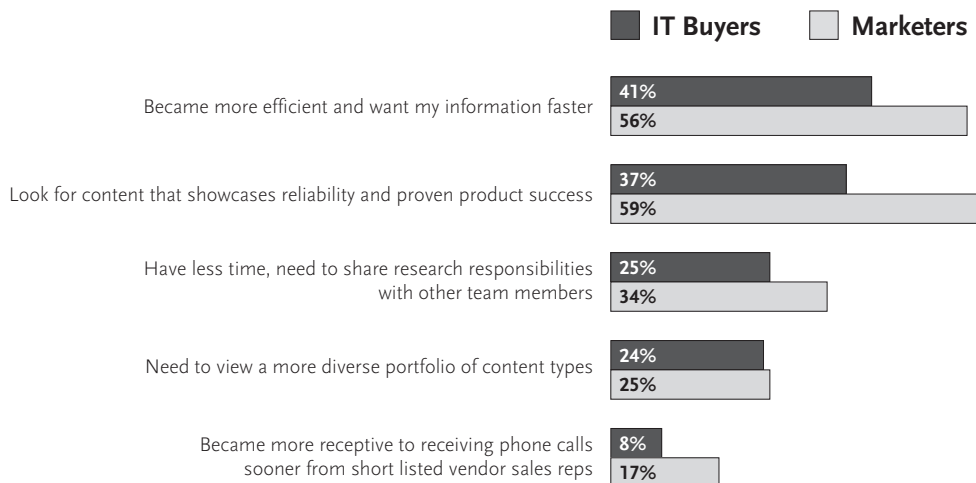|	IT Buyers	Marketers
LinkedIn	59%	73%
YouTube	58%	38%
Facebook	56%	50%
Twitter	31%	71%
Slashdot	19%	5%
MySpace	17%	4%
Other	5%	9%
Reddit	4%	6%
Orkut	4%	3%
Dzone	2%	4%

IT Buyers: Which of the following IT-specific online community websites have you visited in the past three months?

Marketers: Which of the following IT-specific online community websites have you used to market to IT professionals in the past three months?

■ IT Buyers   □ Marketers

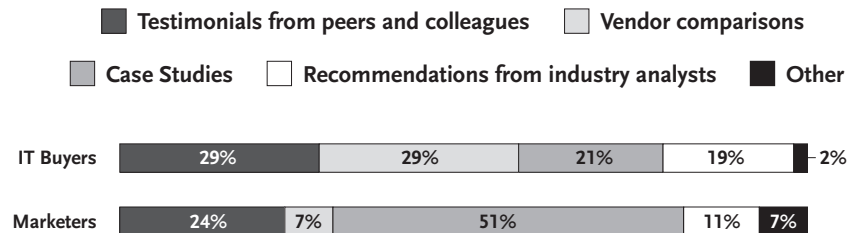| Website	IT Buyers	Marketers
TechTarget IT Knowledge Exchange (ITKE)	58%	22%
TechRepublic Community	54%	9%
IT Toolbox Community	37%	14%
CIO Forum on Linkedin	21%	20%
CNET Facebook page	18%	5%
myITforum.com	14%	3%
TechCrunchIT.com	13%	8%
ReadWriteWeb Enterprise	2%	2%
Other	3%	20%

During this challenging economy, IT buyers are looking to become more efficient with their research process and want vendor comparisons and customer testimonials that show proven product success. Marketers are also focusing much of their content on helping with these areas, and are creating customer case studies to display their products' success, but not providing comparisons of their technology to competitors.

IT Buyers: How has your online research process changed during these hard economic times?

Marketers: What are IT professionals looking for from you to help with their online research process during these hard economic times?

IT Buyers ■ Marketers □

Became more efficient and want my information faster
- IT Buyers: 41%
- Marketers: 56%

Look for content that showcases reliability and proven product success
- IT Buyers: 37%
- Marketers: 59%

Have less time, need to share research responsibilities with other team members
- IT Buyers: 25%
- Marketers: 34%

Need to view a more diverse portfolio of content types
- IT Buyers: 24%
- Marketers: 25%

Became more receptive to receiving phone calls sooner from short listed vendor sales reps
- IT Buyers: 8%
- Marketers: 17%

IT Buyers: In what format do you prefer to evaluate content that showcases reliability and proven product success?

Marketers: In what format do you provide content that showcases reliability and proven product success?

Legend:
- ■ Testimonials from peers and colleagues
- □ Vendor comparisons
- ▨ Case Studies
- ☐ Recommendations from industry analysts
- ■ Other

|	Testimonials from peers and colleagues	Vendor comparisons	Case Studies	Recommendations from industry analysts	Other
IT Buyers	29%	29%	21%	19%	2%
Marketers	24%	7%	51%	11%	7%

On average the entire IT purchase process can take up to a full year. However, identifying a technology problem (Awareness Stage) generally takes less than 2 months, whereas making the final purchase decision from a vendor short-list (Decision Stage) could take up to 6 months.

IT Buyers: How long is your timeframe from identifying your problem to making your purchase decision?

*Marketers:* How long is your sales cycle from identifying a lead to closing a sale?

■ Less than 2 months	☐ 2 to 6 months	■ 6 to 12 months	☐ 12 to 24 months	■ More than 24 months

	Less than 2 months	2 to 6 months	6 to 12 months	12 to 24 months	More than 24 months
IT Buyers	25%	38%	28%	6%	2%
Marketers	11%	32%	44%	12%	1%
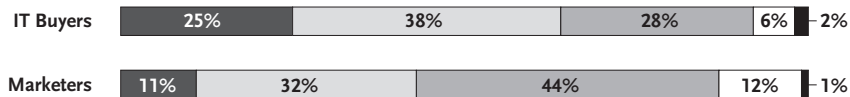
IT Buyers: How long do you spend researching a technology problem?

Marketers: How long do you believe IT professionals spend researching a technology problem/issue before researching specific solutions?

■ Less than 2 weeks	☐ 2 weeks to 1 month	■ 1 to 2 months	☐ 2 to 6 months	■ More than 6 months

	Less than 2 weeks	2 weeks to 1 month	1 to 2 months	2 to 6 months	More than 6 months
IT Buyers	22%	41%	22%	14%	3%
Marketers	6%	26%	28%	31%	8%
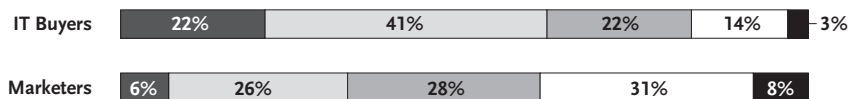
IT Buyers: How long before you make a technology purchase decision once you've finished your research and made a short-list?

Marketers: How long do you believe before IT professionals make a final technology purchase decision once they've finished researching and made a short-list?
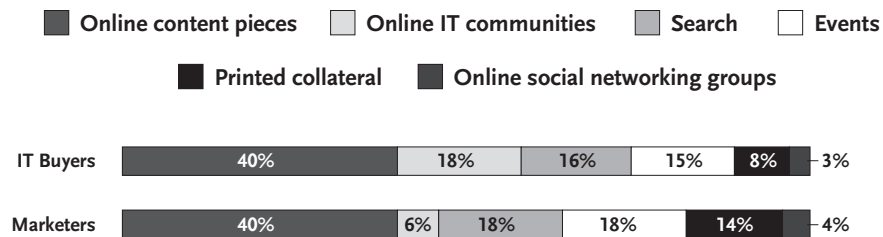
■ Less than 2 weeks	☐ 2 weeks to 1 month	■ 1 to 2 months	☐ 2 to 6 months	■ More than 6 months

	Less than 2 weeks	2 weeks to 1 month	1 to 2 months	2 to 6 months	More than 6 months
IT Buyers	16%	29%	24%	22%	8%
Marketers	8%	24%	32%	30%	6%
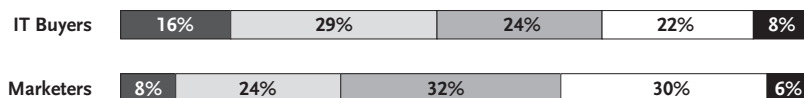
IT buyers and marketers agree that online is the most effective way to communicate both a branding message and for lead generation.
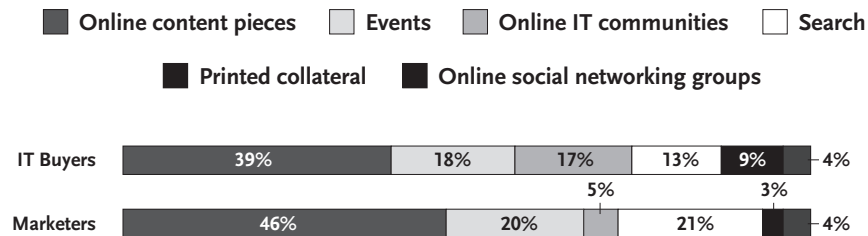
IT Buyers: **If IT marketers wanted to communicate their brand's value message to you, in which form would you be more receptive to hearing their messages?**

Marketers: **Which form do you rely on for communicating your brand's value message to your IT audience?**

Legend:
- ■ Online content pieces
- ☐ Online IT communities
- ▨ Search
- ☐ Events
- ■ Printed collateral
- ■ Online social networking groups

	Online content pieces	Online IT communities	Search	Events	Printed collateral	Online social networking groups
IT Buyers	40%	18%	16%	15%	8%	3%
Marketers	40%	6%	18%	18%	14%	4%

IT Buyers: **If IT marketers wanted to capture profile information from you on a registration form when you are close to selecting a technology solution/vendor, in which form would you be more receptive to hearing their messages and offers?**

Marketers: **Which form do you rely on for capturing profile information and lead generation with your IT audience?**

Legend:
- ■ Online content pieces
- ☐ Events
- ▨ Online IT communities
- ☐ Search
- ■ Printed collateral
- ■ Online social networking groups

	Online content pieces	Events	Online IT communities	Search	Printed collateral	Online social networking groups
IT Buyers	39%	18%	17%	13%	9%	4%
Marketers	46%	20%	5%	21%	3%	4%

IT Buyers Respondent Profile

- Surveyed 1,685 IT professionals from the TechTarget opt-in IT Research Panel.
- All respondents are involved in the IT decision-making process within their organization.
- The respondents represent a variety of different-sized organizations...
    - 25% from companies with less than 100 employees
    - 30% from companies with 100 to 1,000 employees
    - 45% from companies with more than 1,000 employees
- From multiple industries.
    - 21% from the Financial industry
    - 17% from the Government
    - 16% from the Education industry
    - 11% from the Healthcare industry
- A majority hold either IT Management or Administrator/Developer titles.
    - 10% Senior IT Management (C-level)
    - 28% IT Management (Director or Manager)
    - 15% IT Staff
    - 22% Administrators/Developers
- Most respondents are located within North America or Europe.
    - 55% United States
    - 24% United Kingdom

Marketers Respondent Profile

- Surveyed 502 marketers from the TechTarget IT Agenda research panel.
- The respondents represent a variety of different-sized organizations.
  - 47% from companies with less than 100 employees
  - 28% from companies with 100 to 1,000 employees
  - 23% from companies with more than 1,000 employees
- Most respondents focus on marketing Business-to-Business products or services.
  - 82% Business-to-Business
  - 16% Both
  - 2% Business-to-Consumer
- A majority hold either C-level or Management titles.
  - 23% C-level
  - 62% Directors or Managers
  - 15% Generalists/Agencies
- Many of the respondents have a main focus of online marketing and lead generation.
  - 39% Internet Marketing
  - 36% Demand Generation
  - 30% Lead Management
  - 26% Branding
- Most respondents are located within North America.
  - 78% United States

About TechTarget

TechTarget, a leading online technology media company, gives technology providers ROI-focused marketing programs to generate leads, shorten sales cycles, and grow revenues. With its network of more than 60 technology-specific websites and more than 7.5 million registered members, TechTarget is a primary Web destination for technology professionals researching products to purchase. The company is also a leading provider of independent, peer and vendor content, a leading distributor of white papers, and a leading producer of webcasts, podcasts, videos and virtual trade shows for the technology market. Its websites are complemented by numerous invitation-only events. TechTarget provides proven lead generation and branding programs to top advertisers including Cisco, Dell, EMC, HP, IBM, Intel, Microsoft, SAP and Symantec.

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