Rise of Social Commerce

A Trail Guide for the Social Commerce Pioneer

November 1, 2010

By Lora Cecere

with Jeremiah Owyang, Charlene Li, Susan Etlinger, and Christine Tran

Includes input from 54 ecosystem contributors

Table of Contents

2

Open Research

This independent research report was 100% funded by Altimeter Group. This report is published under the principle of Open Research. We want it to spread at no cost with attribution. The Creative Commons License is Attribution-Noncommercial-Share Alike 3.0 United States at http://creativecommons.org/licenses/by-nc-sa/3.0/us. It is intended for you to read, share, and utilize.

Disclosure

Your trust is important to us. As such, we are open and transparent about our financial relationships. With their permission, we publish a list of our client base on our website. At the time of this report's publication, some of the technology providers we interviewed may be Altimeter Group clients. See our website to learn more: http://www.altimetergroup.com/disclosure.

Methodology

This report is based upon 54 qualitative and 123 quantitative responses from people who are actively engaged in the evolution of social strategy as it applies to commerce. The qualitative reviews were conducted between April and August 2010, and the quantitative survey was fielded in July 2010. All companies included in the survey had revenues in excess of $500 million. Half were consumer manufacturers and half were retailers. Departments represented included: Marketing (24%), Sales (35%) and IT (41%). The demographics were consistent across the qualitative and quantitative studies. Additional information about survey questions is available on the Altimeter Group blog, at http://blog.altimetergroup.com. The link to the blog post is http://bit.ly/rscblogpost.

Ecosystem Input

This report could not have been produced without the generous input from thought leaders in retail and consumer products, influencers, and solution vendors who have a vested interest in the evolution of social commerce. Input into this document does not represent a complete endorsement of the report by the vendors or individuals listed below.

To develop this report, Altimeter Group gleaned input from the following leaders:

Manufacturers	Retailers	Consultants	Technology Providers
Avon	Best Buy	Accenture	Alvenda
BP/Castrol	GiantNerd	Booz & Company	Bazaarvoice
Campbell's Soup	Safeway	Cap Gemini	Clarabridge
Cisco	Target	Clarkston	Get Satisfaction
Coca-Cola	Trader Joe's	Deloitte	Gigya
Conair	The Wet Seal, Inc.	IBM	ExpoTV
Del Monte	Whole Foods	Organic	Extole
Dell	Zappos		IRI
EJ Gallo			Janrain
Hallmark			Modcom
Helzberg Diamonds			Nielsen
Levi Strauss & Co.			Plimus
Microsoft			PowerReviews
Newell Rubbermaid			SAP
Nike			SAS
Nine West			Shopkick
PepsiCo			ShopIgniter
Procter & Gamble			Teradata
Steve Madden			Zynga
Whirlpool			

Note: The companies interviewed represent companies with significant investments in social media, and are well on their way to social commerce.   As a result, it is a biased sample. The insights in this report reflect the aggregate view of these leaders and should not be misconstrued to be representative of the industry.

In addition to the qualitative interviews, this report is based on quantitative responses from 123 consumer value chain companies (retail and consumer manufacturers). The demographics in both research segments were similar.

Individual Contributors

Altimeter Group received feedback, direction, or information from the following industry experts and contributors: Deb Schultz, Altimeter Group; Lori Schaefer, SAS; and Chris Rollyson, Consultant.

Executive Summary

Meet the digital consumer. The "Great Recession" set the stage for this new era, and emerging technologies accelerate the transformation. The shopper has fundamentally changed and wants a new buying experience. Trust in big brands is low. Consumers want confidence in what they buy from their friends, and insight from their community.

Social technologies are enabling this shift in shopping habits. They are maturing from social for the sake of being social in marketing, to a new and transformative phenomenon: what we call "The Rise of Social Commerce." Our quantitative study of 123 retailers/consumer manufacturers found that only 20% of companies have a social commerce strategy. However, the pace of change is fast. Eighty-six percent of those same companies indicated that they plan to have a strategy in place in 2011.

Pioneers are driving this change. In our qualitative interviews, on average this change consists of five people in interactive marketing, armed with an array of technologies. In 2011, this will spread into an enterprise initiative to know the digital consumer. The change will enable new ways to sense and shape demand, and build a more powerful relationship with the buyer. As a result, 90% of companies surveyed will increase funding for social commerce initiatives by 8% in 2011. This represents net new spending by the line of business.

This evolution of social commerce (s-commerce) harkens us back to the birth of e-commerce 10 years ago. At that time, e-commerce represented both a new channel and a new way of communicating brand promise to a shopper. The change was pervasive, and it rewrote the relationship between company and consumer.

Three years ago, the action shifted to mobile. Again, it was both a new channel, and a new way to promote brands and redefine the customer experience. The handheld device has fundamentally changed shopping patterns; it has enabled consumers to shop anytime and anywhere. The rise in smartphone use has accelerated the pace of change. According to Nielsen, 30% of shoppers have smartphones, with predictions of 50% adoption in 2011. Of the companies interviewed in our qualitative survey, 40% were actively involved in m-commerce strategies today.

The evolution of social – an evolution that is happening now – is analogous. It is both a new channel *and* a new way of doing business. It is reshaping how consumers shop. It is changing customer expectations about their interactions with brands.

We see this evolution happening in four phases. It is a journey, not a destination. Many brands are getting engaged in the first phase of social commerce, which we call *Let's Be Social*, where it's all about getting social at a minimal level. Dissatisfaction with superficial interactions will drive people to the second phase of social commerce to drive a dialogue. We call this second phase *Enlightened Engagement*.

From here, we believe that social commerce will evolve and drive a new definition of the store, from a discrete entity controlled by the retailer to what we call *The Store of the Community*. It

is a shopping experience in which price, promotion, products and placement are driven from the outside-in by the consumer.

We believe, however, that the bigger story lies in convergence. What happens when e-commerce, mobile and social collide? Everything. This fourth and most mature phase of the social commerce framework – where convergence will catalyze a complete redesign of the shopping experience – is a phenomenon that we call *Frictionless Commerce*.

We see industry sub-segments (e.g. apparel retail, consumer packaged goods, financial services, travel and entertainment, etc.) moving at different rates and on different paths: each is using industry-specific social technologies and processes. However, while each industry has different tactics, they are all moving forward through these four distinct phases to build a closer relationship and increase brand presence with shoppers through the use of new technologies.

The Rise of Social Commerce

Social commerce is new. It takes different forms. It is evolving. No one is clear about just what it will mean. It paves the way to customer-centric value chains, but evolution will come before revolution.

In our interviews, we asked companies to define the term social commerce, and we received a wide variety of answers:

- "Social commerce is providing social context to the shopping experience. A mistake that is often made is that it is an extension of B2C interactive marketing." (Food and beverage manufacturer)

- "To me, it means engaging with our guests on topics that are important and earning the right to offer them the opportunity to buy something. It is about social engagement. Earning attention and capturing intention and delivering a personalized response." (Mass merchant retailer)

- "Our social commerce strategy is in development. We are trying to think through it to drive true relationship-based sales. It is less about cool widgets and more about how we tap into the power of the relationship in the digital sphere." (Drug manufacturer)

- "It is a new way to manage the long tail of the value chain. Product selection by the people for the people." (Apparel manufacturer)

When we asked about the goal of social commerce strategies in our quantitative study, the answers were consistent with our qualitative interviews:

- 32% responded that the goal was to improve the cross-channel experience
- 31% responded that the goal was to improve market share
- 28% stated the goal to be improving the shopper buying experience through the use of social technologies
- 11% defined it as improving the ROI of social investments

We believe that it is all of this and more.

We define social commerce as: "The use of social strategies to anticipate, personalize and energize the shopping experience."

As companies gain an understanding of what they can do with the social graph – the reflection of our real-life social networks – they develop new capabilities to listen, engage and build meaningful dialogue with shoppers. To better understand what social commerce is, it is also important to understand what it is *not*:

- **An extension of e-commerce.** We do not believe that social commerce is simply an extension of B2C e-commerce. We see it as a new channel, and a new way to influence the shopper. We believe that it is enhanced through e-commerce and m-commerce convergence.

- **A traditional marketing initiative.** We also believe that social commerce is not just about interactive marketing. In this definition, it extends across the value chain into areas like customer service and product development to change how we listen and interact with the shopper.

- **About simply adding "whiz-bang" technologies to existing processes.** The greatest opportunity in social commerce is to rethink the value equation for the customer relationship – specifically, how departments like customer service and even manufacturing will be impacted and improved.

In many ways, social commerce today resembles the Wild, Wild West. Some might liken it to the California gold rush – frenetic activity in the valleys of California with get-rich quick schemes and high-rolling gamblers – where new fortunes will be made and lost.

The goal of this report is to help companies navigate their way west, to have a meaningful relationship with the digital consumer. On the journey, services companies are ahead of retail, and retail is ahead of product manufacturers. They will experience some commonalities, but the end result will be different by industry.

To develop this report, Altimeter Group gained insight from over 54 industry leaders, vendors, agencies, and experts to develop a framework, supporting case studies, and a roadmap to help you develop your path to success. The next section describes some of the key findings.

Blazing the Trail

During the next five years, social commerce will spread to become a cross-enterprise grassroots movement that will redesign the shopping experience. The biggest challenge is change management. The transition will happen quickly when executives turn the organization inside out to listen, engage and respond to shoppers.

The path forward has four logical phases (see Figure 1):

- **Let's Be Social:** Programs are launched to drive brand advocacy and increase volume/market share.

- **Enlightened Engagement:** Companies create interconnections of e-commerce and social platforms – both owned and in the wider web – to influence influencers, improve decision-making, and distill the voice of the customer for the enterprise.

- **Store of the Community:** Fans drive assortment, selection, and services through open innovation networks and social networks.

- **Frictionless Commerce:** Companies redesign the shopping experience across channels and categories, to create a truly customer-centric shopping experience.

Figure 1: The Four Phases of the Rise of Social Commerce

Let's Be Social → Enlightened Engagement → Store of the Community → Frictionless Commerce

Source: Altimeter Group, 2010

For the greatest success, the evolution of the model needs to be a cross-functional transformation of the organization from the outside in. It is best led by the CCO, or chief customer officer, or by a well-connected customer advocate reporting to the COO. If this role does not exist, consider adding someone with the ability to transcend departmental demarcations.

Who are the Best Trailblazers?

While companies will "settle" at different places on the trail, when asked who is doing the best job in social commerce, the companies most often cited in our interviews were Amazon, Best Buy, Dell, Hallmark, and Starbucks. We find in the research that there is no single company that has it figured out. Instead, we find that industry sub-groups are moving at different rates toward the goal.

- Fast-moving consumer goods companies (e.g. grocery retail, consumer packaged goods, and food and beverage) are in the early phases of the journey. Most of their programs today are squarely in the *Let's Be Social* phase.

- Consumer electronics have moved to *Enlightened Engagement.*

- Apparel and footwear companies are developing the *Store of the Community.*

- Services companies are pioneers in blazing the trail for *Frictionless Commerce.*

Progressively, these phases enable companies to anticipate, personalize, energize, and ultimately redesign the buying experience, removing the friction and reducing the frustration of shopping. There is no right or wrong answer. The visions will evolve. The social commerce pioneers, like the early pioneers in the United States, will find that they will move west on many trails at different rates, electing to stop and "homestead," at different places on the "trail."

Within each phase, specific tactics and technologies dominate, and there are also different levels of practice (Basic and Advanced) (see Figure 2). The biggest difference is that Basic practices can be mastered quickly, but more Advanced practices require a deeper rethinking of how the value chain works within the company and in the ecosystem.

Figure 2: Basic and Advanced Practices of Social Commerce Phases

	Let's Be Social	Enlightened Engagement	Store of the Community	Frictionless Commerce
Basic	• Basic community presence • Presence of social-driven Q&A • Point solution analytics • Little integration into CRM systems	• Redefine customer service • Share expert insight • Peer and video reviews • Basic sentiment analysis	• Community-driven assortment & services • Fan-driven open design networks • POS connected to social insight analytics • 2-D tagging	• Connect like-minded shoppers • Integrate gaming technologies into loyalty programs • Automate checkout with mobile applications
Advanced	• Integration of social into B2C brand marketing • Social-driven lists • B2C personalization & contextualization • Advanced social CRM	• Integrated marketing programs • Review aggregation across sites • Social couponing • Advanced sentiment analysis	• Real-time social shopping • Shelf personalization • Virtualization of the shopping experience • Demand-shaping analytics	• Geo-location shopping in-store • Integration of social into physical stores • Virtualization of supply chain • Corporate Social Responsibility programs at the shelf

Source: Altimeter Group, 2010

Let's Be Social

In the *Let's Be Social* phase, brands create a strong persona, attempt to engage market influencers, and strive to build unique value for the brand in the community. Over time, the social programs become integrated into overall marketing programs, and B2C programs converge to support the social experience. The focus is on the brand, and brand category competition has recently spurred greater investment.

In this phase, the primary question is: "What is the return on social?" Because this stage is characterized by brand versus brand one-upmanship, the value is small and fleeting. As a result, social CRM tools, social analytics and B2C technologies for improved contextualization grow in importance. Sixty percent of companies interviewed were in this phase of social commerce development.

As companies invest in social media, they have an opportunity to listen to the voice of the community and interact with the shopper in new ways. The emergence of the customer voice enables the redefinition of customer service departments to listen and learn from the shopper in near real-time. This evolution gives rise to the next stage, *Enlightened Engagement*.

Enlightened Engagement

The second phase of the Rise of Social Commerce model is *Enlightened Engagement*. In this phase, companies redesign the information layer to enrich and enlighten the social dialogue across and outside the enterprise. The most advanced work in this area is in consumer electronics, outdoor gear, and entertainment. All of the references in this section are from our interviews, with the exception of the PowerReviews data. Tactics include:

- **Use of subject experts.** Examples include the hiring of a "doodle expert" by Newell Rubbermaid to drive enlightened engagement for the 1.3 million fans on the Sharpie fan page. Another example is the Kimberly Clark "Healthy Vagina" campaign, where all questions submitted to the community on vaginal health were answered from three sources: a physician, a mother, and a peer.

- **Use of social communities to inform.** In the qualitative research, 5% of the respondents were using social tactics to improve customer service and directly tie the voice of the customer to research and development (R&D). Newell Rubbermaid believes that this salvaged two recent product launches and Dell believes that it has redefined their customers' view of their service. Another company reduced the cost of customer service by 30% through the use of Twitter.

- **Syndication of reviews.** Reviews harness the collective wisdom of the community and make it possible to share insight from people whom the buyer is likely to trust. A stark awakening happens when marketers realize that the most important reviews are not on their controlled communities. In our research, the most informed buyers are turning to Amazon, Best Buy, eBay, Staples, and Walmart. For one consumer electronics manufacturer, the syndication of reviews across three retailer websites increased revenue 28%.

- **Facebook "Like" Button.** The "Like" button from Facebook is a simple and extremely effective mechanism to get feedback on programs, products and services. While Levi's was an early pioneer in adding the "Like" button to its own website, we are now seeing rapid adoption of the "Like" button across sites.

- **Video reviews.** Videos allow an instant psychological connection. They quickly answer the question, "Is this a person like me?" Based on data collected by PowerReviews from over 12 million reviews over the past two years, video is growing in popularity. While images in reviews have doubled, video reviews have grown 10X.

- **Rewards.** Many companies drive dialogue by combining fun with rewards. Want to be the biggest "Nerd" on GiantNerd.com? This e-commerce site is dedicated to sports enthusiasts who care about the details of outdoor gear. To compete for the "Biggest Nerd" status, adult outdoor gear users collect points through alerts, lists, groups, reviews, question and answer sessions, and product ratings. Or, consider the impact of Newell Rubbermaid's "Uncap What is Inside You" contest, which catapulted the Sharpie brand to a number one market share position.

Store of the Community

The *Store of the Community* phase of the *Rise of Social Commerce* model is no longer simply about information – it's about products, specifically social-driven selection, merchandising, and assortment. Unlike in the past, where the retailer designs the store experience, the community defines go-to-market programs with a focus on peer-to-peer (P2P) relationships – thus connecting people in a new and more meaningful way. This phase also adds a fifth "P" to the marketing mix:

1. Product
2. Price
3. Promotion
4. Placement
5. *People*

Today, we mostly see apparel and consumer durable goods companies in this phase, because their wide assortment of goods benefit from social input. Here we share four different case studies from four different industries:

- **Diamond Foods:** Kettle Foods, Inc., a division of Diamond Foods, took the Division A award at the Grocery Manufacturing Association for its annual "People's Choice" campaign, in which consumers purchase and vote online for the new chip flavors they want Kettle Brand to introduce into the market. The campaign, which exists almost exclusively online, marries consumer engagement, public relations and product development into one program. Last year it generated more than 7,000 new flavor suggestions and 75,000 unique website visits.

- **Lego:** Lego Mindstorms is a line of programmable robotics/construction toys, manufactured by the Lego Group. It comes in a kit with many pieces, including sensors and cables. Mindstorms originated from the programmable sensor blocks used in the line of educational toys. The first retail version of Lego Mindstorms was released in 1998 and marketed commercially as the Robotics Invention System (RIS). For the last six years, a community of 100 "citizen developers" has decided on new product ideas and product assortment for each country.

- **Quirky (www.quirky.com):** The founder of Quirky says he started the company with an "iPod, a model and a second mortgage." In its 15-month history, the company has designed and launched 63 new products based on community submissions. On the website, the community can influence ideas in progress, submit a new idea, or shop. Two projects make it out of the innovation funnel each week. Contributions are rewarded; the community earns 10% of sales made to a retailer or 30% of sales made on Quirky.com. Perpetual royalties are distributed to the person with the original idea, the influencers, and the developers. The founder believes that unless contributions are rewarded, communities get "creative fatigue." At the time of this report's publication, the site advertises the reward system: "Mathew Proprocki had earned $3641.29 from helping with 10 products."

- **Wet Seal:** Each new season, fans post 50 million viral impressions per month on Wet Seal's virtual runway. They share outfits with their friends, and get instant feedback on the best look. The social dynamic extends to the buying experience. In-store shoppers who scan an item's tag at a kiosk or using the iRunway iPhone application are treated to 35,000 possible outfit combinations. The goal is to double the number of viral impressions with each new release of the game. When a product is out of stock, Wet Seal communicates to the merchandiser that the requested outfit is no longer available. In the future, this input will be used to drive assortment and replenishment. According to Chief Information Officer Jon Kubo, "While the digital shopping experience is exciting, 80% of the work in making this strategy happen is in the back office."

A characteristic of this phase is the goal to create a more unified and differentiated experience across channels. The unprecedented level of information transparency available today has raised the bar for redefining and improving back-office processes of inventory, order management, returns, and rebates.

Frictionless Commerce

Frictionless Commerce, the fourth phase of the *Rise of Social Commerce* model, occurs when companies redefine the entire shopping experience, from the customer back to the enterprise. Just as Amazon used e-commerce and iTunes used m-commerce to propel new business models, we believe that new players and offerings will emerge to capitalize on the social commerce opportunity.

Here are some early examples:

- **Delta:** Travel is social. Delta.com is not. Bob Kupbens, VP e-commerce, Delta Airlines understands this. To meet the needs of group travel, Delta developed a social site on Facebook that enables travelers to incorporate personal connections into their travel planning. For example, the leader of a soccer team or a Girl Scout troupe can determine who should sit next to each other, communicate with parents and send special instructions to the airlines, all using Facebook's social graph in conjunction with Delta's transactional system.

- **Best Buy:** When buying high-end consumer appliances, 80% of shoppers start on a website and look at syndicated reviews. They then confirm their desire to purchase by viewing the product, often in the physical store. While in the store, they are able to use loyalty cards (or an application such as Shopkick) on their mobile phones to earn or redeem points, scan items for additional information, and check out and schedule home installation.

We believe that social technologies will reach maximum potential when e-commerce, m-commerce and social commerce strategies converge through the use of gaming, 2-D tags, virtualization, social couponing, mobile applications, and mapping/geospatial technologies. This convergence of technologies will energize, inform, and connect the shopper in new ways. To understand the vision of leaders paving this trail, look to the media, home entertainment, and financial service industries.

A stumbling point in the development of the *Frictionless Commerce* vision is a common user identity. To serve the shopper, we need a common and unified method of identification. To make this happen as we merge channels, retail loyalty data will move from a household to individual level, and unique ID technologies like those from Gigya and Janrain will enable a more holistic, cross-functional experience between sites and stores.

To embrace the full potential of this evolution, start with a blank sheet of paper and think about how to use social technologies to redesign the experience from the shopper's perspective. To enable this vision, build more near real-time and accurate processes for inventory management, transparency of quality information, and return policies into your operations.

Barriers and Drivers

How do you choose how to proceed? In the words of Manish Mehta, social pioneer at Dell, the answer lies in failing forward. Manish recommends that companies "move quickly, make decisions based on the voice of the customer, and fail forward, taking your insights onto the next chapter of the Rise of Social Commerce."

In our qualitative surveys, we asked the question "What do you see as the biggest barrier to social commerce?" The most often cited barriers were as follows:

- 72% cited that the traditional definition of marketing was a barrier. Companies are having difficulty moving from tightly controlled product marketing, where the message is pushed out to customer, to a market-driven message driven by the community.

- 63% responded that functional silos were a major issue. For companies early in the journey, it was the silo between social and other forms of interactive marketing. As the company matured its social commerce efforts, the barrier was finding a cross-functional champion capable of leading integrated efforts.

- 54% mentioned the large array of immature technologies. Teams are uncertain where to turn and what to try next.

- 42% mentioned that it was training and education. A new way of doing business requires retooling people, resources, and processes.

Of those interviewed, only one company mentioned funding as a barrier. The funds are there, and the interest is high. The largest barriers lie in the immaturity of the technologies and the organizational change management issues that a true customer-centric strategy requires.

Recommendations

To begin and continue your social commerce journey, we would like to leave you with five recommendations:

1. **Shift from transactional to social.** Social commerce enables social buying and requires empowering the social experience. Buying needs to be social. As it is defined today in e-commerce and m-commerce processes, it is anything but social.

   Don't fall into the trap that social commerce is a sub-segment of e-commerce or m-commerce. Each form of commerce has its place in the definition of frictionless commerce. E-commerce drives efficient transactions, m-commerce enables buying and getting information anytime and anywhere, and social commerce empowers the frictionless, social shopping experience. It is also an effective aggregator for the voice of the customer into the voice of the community.

2. **Prepare for greater volatility.** The viral nature of social commerce makes it very unpredictable. For example, while paper couponing has a 5% usage rate, e-couponing has a 25% conversion rate and social couponing has over a 75% conversion rate. Social couponing ignites demand. For example, the August back-to-school promotion from Gap using Groupon featured a $50 coupon for $25. Coupons were purchased at the rate of 10 per second, before the event was closed early at noon with the sale of 200,000 coupons. Social makes demand more volatile, requiring greater enterprise synchronization of events and even tighter coordination across the value chain.

3. **Unleash the power of convergence.** Focus on the redefinition – and potential improvement – of the shopping experience through the intersection of e-commerce, m-commerce, and social commerce strategies. Merge the efforts of teams that often operate in separate silos, and define the cross-channel experience from the shopper back into the design of processes and systems.

4. **Build horizontally.** Use the *Rise of Social Commerce* phases to redefine customer service, product assortment, and go-to-market strategies. Start with a blank sheet of paper to define the horizontal processes and create a true customer-centric value chain.

5. **Fail forward.** Don't be afraid to make mistakes. Social commerce is evolving. Each technology will mature, and there will be lots of uncertainty along the way. Today there are 38 types of customer tagging, and standards will not be certain for five years. You cannot afford to wait. Experiment, investigate, and fail forward.

Conclusion

Social commerce is new. There is no one pre-defined trail for social commerce pioneers, but as you define your social strategy, focus on listening, engaging, and interacting with your community. If you do this with the courage of your convictions, the right answer will unfold on the trail before you.

About Us

Altimeter Group is a research-based advisory firm that helps companies and industries leverage disruption to their advantage. We have four areas of focus: Leadership and Management, Customer Strategy, Enterprise Strategy, and Innovation and Design.

About Lora Cecere, Partner

Lora Cecere (@lcecere) is a Partner with Altimeter Group. She focuses on the evolution of disruptive technologies for consumer value chains. Previously, Lora was a Vice President of Value Chain Strategies at AMR Research (now Gartner Group), and has over 25 years of experience in building software and leading groups within consumer products manufacturers (Clorox, Dreyers Grand Ice Cream, Kraft, and Procter & Gamble). She writes the *Supply Chain Shaman* blog and is a frequent columnist for *Consumer Goods Technology* and *Supply Chain Management Review*.

Contact Us

Altimeter's Hangar (At the Crossroads)
1875 S. Grant St. #680
San Mateo, CA 94402-2667
info@altimetergroup.com
www.altimetergroup.com

Consulting Inquiries

David Stanley
VP, Business Development and Sales
Phone: 719.357.7826
Email: david@altimetergroup.com