

Magic Quadrant for IT Service Support Management Tools

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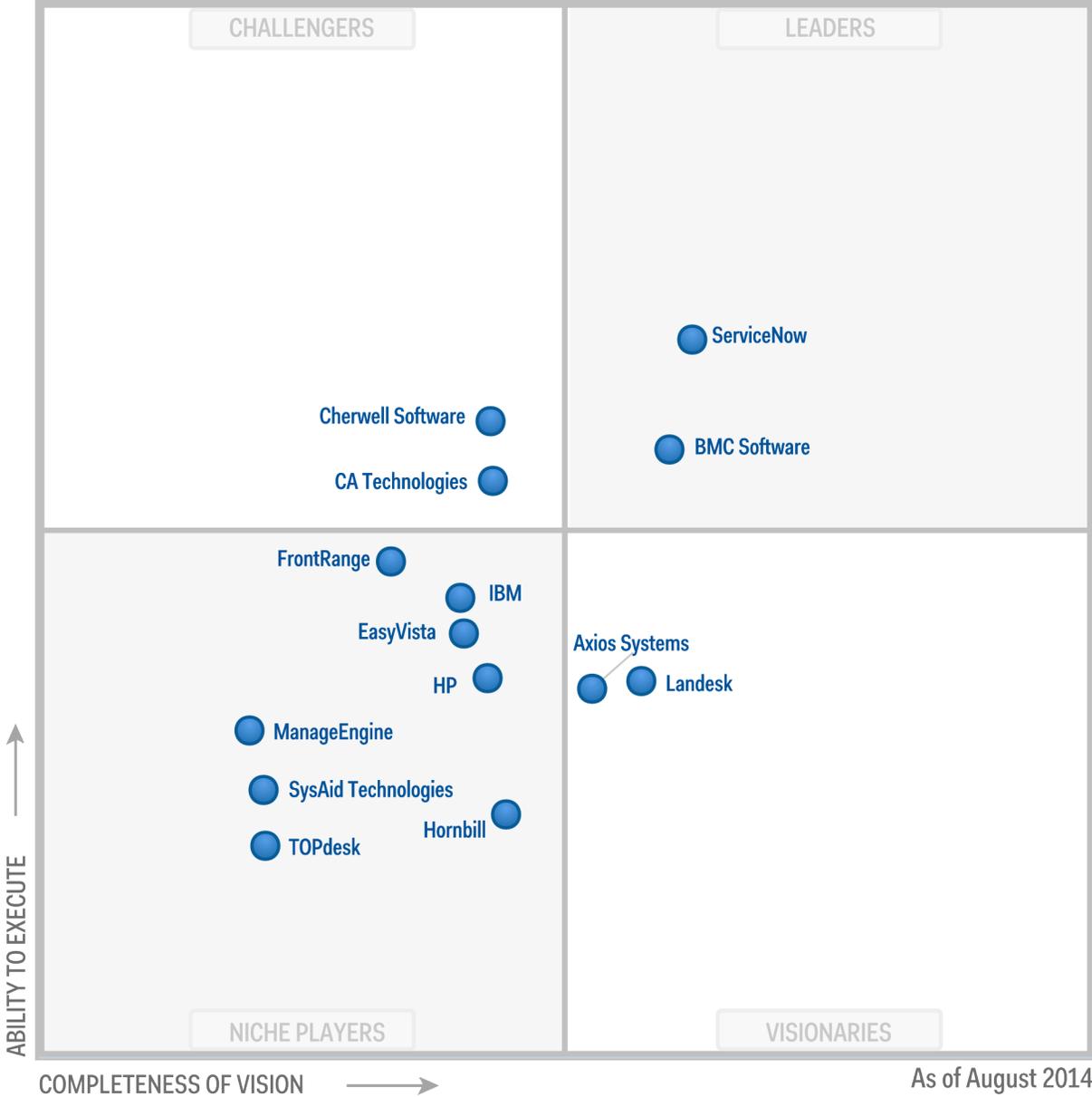
To better support the business, I&O managers often turn to IT service support management tools. The vendors in this Magic Quadrant offer integrated products that address functionality from a combined perspective of people, processes and tooling.

Market Definition/Description

IT service support management (ITSSM) tools enable IT operations organizations, specifically infrastructure and operations (I&O) managers, to better support the production environment. ITSSM tools automate the tasks and workflows associated with the management and delivery of quality IT services to the business.

Magic Quadrant

Figure 1. Magic Quadrant for IT Service Support Management Tools



Source: Gartner (August 2014)

Vendor Strengths and Cautions

Axios Systems

Offering Evaluated: Axios assyst

Founded in 1988, Axios Systems (Axios) is a privately held company with headquarters in Edinburgh, Scotland. Its founder was part of the workgroup that helped shape the contents and format of the original ITIL books during the genesis of the IT Service Management Forum (itSMF); consequently, Axios assyst is strongly aligned with ITIL best practices. Axios provides a well-regarded IT service catalog that is licensed within its ITSSM solution. Axios' highly differentiated IT Resource Performance Management (RPM) feature uses social collaboration and gamification to enable problem-solving and knowledge-sharing among IT groups.

Strengths

- Axios concentrates exclusively on providing ITSSM solutions.
- Axios has a high level of market understanding with respect to mobile, social and context-aware capabilities, demonstrated in IT RPM and the InfoZone view (contextual information about users and the IT environment for decision support) for support analysts and technicians.
- Axios maintains good relationships with customers and incorporates significant client feedback into product development.

Cautions

- Its sales capabilities are not as effective as its competitors in some regions, as Axios struggles to add customers quickly.
- The self-service portal capabilities require Adobe Flash, which has the potential to present access challenges for mobile users that cannot use Flash.
- The process designer tool that aligns Axios assyst with alternative IT process management frameworks is cumbersome.

BMC Software

Offerings Evaluated: BMC Remedy ITSM Suite, BMC FootPrints Service Core and BMC Remedyforce

Founded in 1980, BMC Software (BMC) is a privately held company headquartered in Houston, Texas. BMC licenses three enterprise-oriented ITSSM products: BMC Remedy ITSM Suite, BMC FootPrints Service Core and BMC Remedyforce. Remedy ITSM is available in on-premises and SaaS models (Remedy OnDemand). The products are aimed at organizations and managed service providers that have higher-than-average levels of IT maturity. BMC FootPrints (licensed perpetually on-premises) and BMC Remedyforce (licensed in the SaaS model) target midsize to enterprise-level customers and work well for customers who have low or average levels of IT maturity. While all products benefit from BMC's global marketing and sales channels, the source codes for all three products differ. Although BMC still holds the majority of ITSSM market share, its position has declined since 2012. The strength of BMC's product lineup often leads prospective customers to shortlist it for enterprise-level deals, but BMC often loses because of its pricing and complexity. (For

further information on BMC, see "Vendor Rating: BMC Software" and "SWOT: BMC Software, ITOM Software, Worldwide.")

Strengths

- The introduction of MyIT and AppZone highlights BMC's understanding of the needs of higher-maturity, service-aligned IT organizations; BMC seeks to improve business-user productivity and provide a more satisfying experience for customers when working with the IT organization.
- BMC's ability to target multiple market segments by offering products with varying ease-of-use and capability levels positions it to compete in more bids than other ITSSM vendors.
- BMC maintains excellent IT operations management (ITOM) brand recognition outside ITSSM, and works to integrate its broader portfolio of products with its ITSSM solutions.

Cautions

- Gartner believes current debt load will likely limit BMC's options for doing major acquisitions within the ITSSM family of products.
- Broad market confusion remains around which BMC ITSSM products best meet the needs of particular customers.
- Customers of Remedyforce and FootPrints that desire broader BMC functionalities currently do not have the same integration experience across all products in the BMC ITOM portfolio.

CA Technologies

Offerings Evaluated: CA Service Management and CA Cloud Service Management

Founded in 1976, CA Technologies (CA) is a publicly held company headquartered in Islandia, New York. CA licenses two ITSSM products: CA Service Management and CA Cloud Service Management. CA Service Management is primarily licensed perpetually on-premises. Cloud Service Management (formerly known as CA Nimsoft Service Desk) is licensed exclusively in the SaaS model. CA's bifurcated product approach has succeeded in large-enterprise, low-maturity deals, where Cloud Service Management has won, and CA Service Management would not have fared well. CA has been effective in increasing brand awareness, and its programs that offer extended trials for products such as CA Cloud Service Management have been well received. In a market where customers replace tools often, CA customer retention has been high, due in part to its customer outreach and engagement programs. (For further information on CA Technologies, see "Vendor Rating: CA Technologies.")

Strengths

- CA Service Management and CA Cloud Service Management use mobile and social capabilities effectively for IT business and internal IT communication and collaboration.

- Improved marketing of CA Cloud Service Management has been well received by enterprise organizations with low maturity levels — a segment that has traditionally been difficult for products to cater to.
- CA remains a well-regarded brand with high levels of market awareness.

Cautions

- Prospective customers perceive CA Service Management as too complex, because it fails to provide a unified view across all IT administrative product consoles.
- CA Service Management lacks dashboard capabilities and only offers enhanced reporting through a partnership with Xtraction Solutions, which increases the total cost of ownership (TCO) for customers who desire richer dashboard capabilities.
- Although CA has improved its upgrade path, many customers use older versions of CA Service Management.

Cherwell Software

Offering Evaluated: Cherwell Service Management

Cherwell Software (Cherwell) is a privately owned company headquartered in Colorado Springs, Colorado. Cherwell focuses exclusively on IT service management. It provides a simple pricing model, and licenses its solution in perpetual and SaaS models, which appeal to small or midsize businesses (SMBs). Cherwell recently added mergeable applications (mApps) capabilities that allow Cherwell's partners and customers to exchange configurations and user-created integrations with each other. Thus, Cherwell's customers have opportunities to extend the value of their investments without significantly leveraging internal resources or hiring third-party professional services partners. Cherwell is expanding its offices and partnerships globally, which has coincided with its rising level of market awareness.

Strengths

- Cherwell's excellent customer service and support has resulted in high renewal rates and positive customer feedback.
- Cherwell has improved its IT self-service, reporting and dashboard capabilities, which help resource-constrained organizations to streamline support and demonstrate business value.
- Cherwell has improved its sales channels, which have led to better handling of deal management and better pricing.

Cautions

- Cherwell lacks native ITOM capabilities and ease of integration with broader ITOM functionalities.

- Cherwell is still trying to catch up with the global presence and marketing effectiveness of its larger competitors.
- Cherwell's major release cycles are slower than those of its larger competitors.

EasyVista

Offering Evaluated: Easy Vista

Founded in 1988, EasyVista is a publicly traded company headquartered in New York City, New York. EasyVista operates in the SMB market segment, offering good ITSSM capabilities and moderate integration levels with broader IT operations management capabilities. EasyVista has been adding capabilities to its product set, such as its ServiceApps capability, which enables higher levels of personalized interaction via widgets derived from a wide range of data sources. EasyVista's customers are concentrated in Europe. The company has a smaller presence in North America compared with its key competitors. Recently, EasyVista has successfully replaced much larger IT operations management portfolio vendors, which should help validate EasyVista for larger organizations and raise awareness among the large-enterprise segment.

Strengths

- EasyVista's product is affordable and easy to use, reducing the time-to-value windows for midmarket customers.
- EasyVista's presence outside Europe is expanding.
- With its moderate integration into larger IT operations management functionalities, EasyVista fits well in enterprises that are looking to provide a better front end for their large IT operations management portfolios.

Cautions

- EasyVista's annual release cycles for major enhancements are slower than its larger competitors.
- EasyVista has made fewer enterprise-size deals compared with its larger competitors.
- EasyVista's North American customers find that access to professional services can be a challenge.

FrontRange

Offering Evaluated: FrontRange Heat Service Management

Founded in 1989, FrontRange is a privately held company headquartered in Milpitas, California. FrontRange Heat is a collection of applications designed to enable organizations manage services and client devices. Heat Service Management is focused on providing a flexible ITSSM solution that is licensed on-premises perpetually or through the SaaS model via the same platform. Compared

with previous releases, Heat Service Management has improved integration across functional modules, and has synchronized its release cycles with its on-premises and SaaS-based offerings. FrontRange has improved its marketing execution by adding flexible licensing priced appropriately for its target segment, resulting in notable competitive wins during the past 18 months. The company needs to help more of its legacy ITSM customers migrate to the latest on-premises or SaaS version of the Heat platform.

Strengths

- FrontRange supplies a multitenant platform for its SaaS offering, providing customers with economies of scale and simplifying the upgrade process.
- FrontRange has improved its release cycle cadence, providing two to three major releases per calendar year.
- FrontRange has invested in its R&D organization, and reinvested a good amount of revenue in its product portfolio.

Cautions

- FrontRange is poorly balanced between on-premises and SaaS offerings, to realize its investment in a multitenant SaaS offering.
- Although it has been making customer shortlists more frequently than in the past, FrontRange tends to price itself out of competitive situations against other vendors that target the midmarket.
- FrontRange is competitive on price, but still presents a confusing ITSSM pricing model, particularly to customers upgrading to Heat Service Management.

Hornbill

Offering Evaluated: Hornbill Supportworks

Founded in 1995, Hornbill is a privately held company headquartered in Ruislip, England. The company has invested heavily to build the Hornbill platform, which enables businesses collaboration and works in conjunction with the Supportworks ITSSM product. Organizations that license Supportworks in isolation get a product that provides incident management capabilities that understand the affected users' context through the tasks within the process. Social IT management is fostered through the adjacent Hornbill platform, which is licensed separately. Hornbill Supportworks ships with processes aligned with the ITIL framework. Process design and management tools enable customers to adopt a wide range of frameworks.

Strengths

- Hornbill's "Human Touch" support capabilities provide out-of-the-box, context-aware support and collaboration.

- Hornbill business collaboration software can extend Supportworks capabilities.
- Hornbill has good brand recognition in Europe and close connections with European IT special interest groups, such as itSMF and Service Desk Institute (SDI).

Cautions

- Hornbill has limited brand awareness outside Europe, and is challenged with getting its message to a wider range of clients worldwide.
- Hornbill has a limited sales channel; it could benefit by growing partner networks, which some of its competitors are doing.
- U.S.-based customer references report that obtaining product support for Hornbill Supportworks is sometimes more difficult than expected.

HP

Offerings Evaluated: HP Service Manager and HP Service Anywhere

Founded in 1939, HP is a publicly traded company headquartered in Palo Alto, California. HP has two products for the ITSSM market: HP Service Manager, available on-premises for enterprise organizations, and HP Service Anywhere, available as SaaS for SMBs. HP is an established name in the ITOM market. In 2011, HP acquired Autonomy, a big data analytics company, and has used the technology to build HAVEn, an analytics platform. In 2014, HP introduced a service catalog and request fulfillment product, HP Propel, alongside capabilities built into its ITSSM products. The basic edition of HP Propel is offered free of charge. (For further information on HP, see "Vendor Rating: HP.")

Strengths

- HP has a strong brand and global reach. Its professional services organization is available in all major regions, and provides a consistent quality of ITSSM implementation and support.
- HP has folded the big data capabilities of Autonomy and Vertica into its ITSSM strategy, enabling customers to use search and analytics to improve areas such as incident management, knowledge management and social collaboration, which serve as key differentiators in the ITSSM market.
- HP Service Anywhere and HP Propel have improved HP's ability to provide simpler, easier-to-use offerings for IT service support and request management functions compared with its traditional, on-premises-based products.

Cautions

- HP has demonstrated poor marketing execution, reflected by the low frequency with which HP ITSSM products appear on client RFP shortlists, despite HP's brand recognition.

- Gartner's market share analysis concludes that HP's share of the ITSSM market has dropped for three consecutive years, which indicates it is unable to retain customers and attract new ones at levels comparable to its competitors.
- Some customer references and Gartner clients report difficulties when integrating the ITSSM tools with other ITOM products from HP.

IBM

Offering Evaluated: SmartCloud Control Desk

Founded in 1911, IBM is a publicly traded company headquartered in Armonk, New York. IBM SmartCloud Control Desk combines asset and service management offerings that enable organizations to manage services delivered via IT and non-IT assets. SmartCloud Control Desk provides a hub that IT organizations use to integrate with the IBM Cloud & Smarter Infrastructure bundled offering (Tivoli Software, Maximo, Netcool, Tririga, and Endpoint Manager) to deliver an end-to-end service view of the environment they support.

IBM Service Engage is part of a broader IBM strategy to market and sell directly to the IT practitioner. It offers an immersive Web experience where prospects can view demos and request free, timed trials of IBM Infrastructure Management products, including SmartCloud Control Desk. SmartCloud Control Desk appeals to customers who want rich functionality and are able to manage a steep learning curve. (For further information on IBM, see "Vendor Rating: IBM.")

Strengths

- IBM maintains its strength through its ability to sell into its customer base, rather than aggressively marketing SmartCloud Control Desk against other vendors' ITSSM products.
- IBM has extensive global partnerships and resources that appeal to, and support, its large global customer base.
- SmartCloud Control Desk is a well-consolidated IT service support management offering that provides broad functionalities in IT/operational technology (OT) asset management and client management.

Cautions

- IBM has not developed SmartCloud Control Desk to compete aggressively within a broader market of potential customers.
- IBM customers have not demonstrated SmartCloud Control Desk integration with a wider range of IBM products, such as IBM Connections.
- The complexity of IBM's ITSSM offering introduces a steep learning curve, particularly for I&O organizations not accustomed to IBM ITOM software.

Landesk

Offering Evaluated: LANDesk Service Desk

Landesk is a privately held company headquartered in Salt Lake City, Utah. LANDesk Service Desk integrates with its broader portfolio of assets, systems, security and client and mobile device management solutions to enable IT organizations to take a user-oriented approach to IT service management. Landesk's move to Total User Management licenses, which bundle all Landesk products by the number of users in an organization, allows Landesk customers to license a consolidated product set. By providing a wide range of context that supports interactions, Landesk enables IT organizations to use machine data to improve the business-user experience. With Landesk's strong process-design tool, IT organizations can structure and automate complex ITSSM tasks within a process.

Strengths

- Landesk's ITSSM solution focuses on business users and endpoints, and easily integrates with its client and mobile device management offerings.
- Landesk has improved its partnership program and is working well with third-party independent software vendors (ISVs).
- Customer references report that Landesk's ITSSM product is easy to implement and configure to suit their organizations' requirements.

Cautions

- The sales and marketing teams often struggle to highlight the differentiation between Landesk's and its competitors' ITSSM offerings, and, instead, focus on where Landesk has traditionally demonstrated market leadership — namely, client management.
- Landesk does not have as many SaaS customers as other vendors with dual-licensing models.
- Customer references state that the Web-enabled UI has less functionality than the thick client; thus, the product may be less versatile when accessed from the Internet and mobile devices.

ManageEngine

Offering Evaluated: ServiceDesk Plus

Founded in 1996, ManageEngine is a division of Zoho, a privately held company headquartered in Pleasanton, California. Zoho caters to the SMB market in IT operations management with its ManageEngine brand. ServiceDesk Plus is a stripped-down solution with a download-and-deploy channel and requires no professional services or highly skilled internal resources. ManageEngine changed the ITSSM market dynamics when it announced it would offer ServiceDesk Plus free of charge. ManageEngine has a large customer base (more than 25,000 paid customers), primarily composed of SMBs.

Strengths

- ServiceDesk Plus is a cost-effective solution for SMBs.
- ServiceDesk Plus serves as a bridge to ManageEngine products for application performance management (APM) and network performance management, which integrate easily with it.
- ManageEngine has run several successful marketing campaigns to promote the free version of ServiceDesk Plus, which has raised ManageEngine's profile with ITSSM tool buyers.

Cautions

- While all ITSSM capabilities are present for inclusion, capabilities beyond incident management are subpar.
- ServiceDesk Plus's low-cost provider model also means there is a trade-off between cost and product quality.
- Development and support resources must scale across ManageEngine and many Zoho products, and may be spread thin.

ServiceNow

Offering Evaluated: ServiceNow IT Service Automation Suite

ServiceNow is a publicly traded company headquartered in Santa Clara, California. Its SaaS products primarily target large enterprises. ServiceNow's suite can be hosted on-premises in exceptional circumstances. ServiceNow has invested in regional data centers to address local data and performance requirements to drive the majority of its business through SaaS. The company has looked for revenue beyond the ITSSM market for customers in what it calls "enterprise service management," and refers to its product as a cloud-based platform with a single system of record. At present, most customers license ServiceNow IT Service Automation Suite with the intention of building on the development platform to extend into other areas of the business. (For further information on ServiceNow, see "SWOT: ServiceNow, IT Operations Management Software, Worldwide.")

Strengths

- ServiceNow's high-availability SaaS architecture provides customers with stable, low-latency instances.
- ServiceNow has a strong, highly effective sales and marketing capability that has attracted many customers and driven its product into most of the ITSSM RFP shortlists that Gartner sees.
- ServiceNow's rapidly expanding partner network helps organizations around the globe with not only implementing the product, but also developing simple request-and-fulfill applications on the ServiceNow development platform.

Cautions

- IT operations management offerings licensed with IT Service Automation Suite (configuration management database [CMDB], IT Service Catalog and IT Asset Management) may require licensing additional ServiceNow products when a more detailed set of requirements is presented with regard to these functionalities.
- Changes to pricing models have confused prospects and some customers.
- On-premises customers pay the same as SaaS customers, even though they cover the hosting directly and do not benefit from automatic upgrades.

SysAid Technologies

Offering Evaluated: SysAid

SysAid Technologies (SysAid) is one of two new vendors in this Magic Quadrant. It is a privately held company headquartered in Airport City, Israel. SysAid produces on-premises and SaaS software that focuses on core ITSSM functionality, to keep its price lower than its competitors, and that targets the SMB market. A free-of-charge version of the SaaS product is available for small organizations that have basic requirements; a trial of the paid version is also available. The product includes a basic benchmarking feature that enables customers to compare several statistics against averages from other SysAid customers. Customers can use SysAid's online forums to vote on enhancements to influence the product road map. SysAid offers varied subscription options; for example, top-tier (Gold) customers are offered an annual review of their usage of the product. SysAid customers are based primarily in North America, Europe and South America.

Strengths

- SysAid has a successful viral marketing strategy; "Joe the IT Guy" enables brand communications to reach a wide audience.
- SysAid provides a simple solution that meets the needs and budgets of most SMB buyers.
- The free-of-charge SaaS license model enables SysAid to increase its brand awareness, particularly in Brazil, Russia, India and China.

Cautions

- SysAid suffered from several major outages of its SaaS solution during 2013.
- SysAid lacks an expansive connector library for organizations in search of richer levels of integration.
- SysAid functionality is weaker beyond core ticketing and reporting.

TOPdesk

Offering Evaluated: TOPdesk

TOPdesk is a privately held company headquartered in Delft, Netherlands. TOPdesk can be implemented quickly and is easy to manage, and doesn't require a customized deployment. Rather than trying to compete with large ITOM vendors and advanced ITSSM tools, the company targets IT organizations that are looking for a shared solution for IT, facilities and HR services. At present, the majority of its customers are in Europe. Software pricing is based on the number of business users supported within a company.

Strengths

- TOPdesk is relatively easy to use, set up and configure.
- TOPdesk has a large number of customers in Europe.
- TOPdesk drives high levels of customer satisfaction.

Cautions

- TOPdesk primarily sells direct, and has fewer partners and indirect sales channels than other vendors in this market. This restricts its ability to grow outside Europe.
- Customer references were not able to easily integrate TOPdesk with a broader set of IT operations management functionalities.
- TOPdesk lacks strong change, configuration and release management capabilities, compared with other vendors evaluated in this research.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor's appearance in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

- SysAid Technologies
- TOPdesk

Dropped

- Serena Software — Gartner did not have recent evidence that Serena Software derives at least \$12 million in annual revenue from its ITSSM product, Serena Service Manager.

Inclusion and Exclusion Criteria

In the 2014 Magic Quadrant for ITSSM tools, Gartner has focused on vendors whose IT service support functions enhance product usability. These vendors offer easy-to-use, out-of-the-box best practices. Their next-generation support capabilities are specific to mobility, and they use social collaboration to increase product effectiveness and efficiency.

To be included in the 2014 Magic Quadrant, vendors must:

- Provide an ITSSM product that includes functionality for IT incident management, problem management, change management, configuration management, release governance, IT user self-service (for knowledge and request management), IT knowledge management, IT service support analytics and reporting, and SLA management of incident and service requests.
- Offer the product optimized for use on a mobile device.
- Derive at least \$12 million in annual revenue from ITSSM products.
- Have a sales presence or partner network that spans at least three of the following regions: North America, South America, EMEA, Asia/Pacific region or Australia.
- Provide 10 qualifying customer references (at least five of whom use the product version being evaluated). These reference customers should:
 - Use the licensed ITSSM tool solutions in production environments.
 - Use the tools to support and automate at least five of the following processes: incident management, problem management, change management, configuration management, release management, knowledge management or request management.
 - Include, at minimum, 5,000 business users of IT.
 - Be located in at least three of the following regions: North America, South America, EMEA, Asia/Pacific region or Australia.

Because Gartner bases its main evaluation on mainstream user experiences, rather than on future releases or recent releases that have been broadly tested, the product versions we considered as part of this evaluation must have been generally available by 1 March 2014.

Evaluation Criteria

Although a vendor may meet the inclusion criteria for the Magic Quadrant for ITSSM Tools, its final placement on the Magic Quadrant will depend on how it scored in several categories. The evaluation criteria are based on Completeness of Vision and Ability to Execute.

Ability to Execute

Product/Service: Gartner evaluates the eight capabilities essential to the selection of an ITSSM tool:

1. Incident and problem management — The tool is evaluated on the ability to manage the life cycles of IT incidents and problem records from recording to closing. The tool should support the collection, analysis and communication of incident and problem management data.
2. Change, configuration and release management — The tool is evaluated on the ability to govern various aspects of the IT change management process. The tool must also support the configuration management process by enabling the creation and maintenance of a complete and accurate picture of configuration across various infrastructure elements via a CMDB. Lastly, the tool must provide release governance capabilities to ensure that approved changes are executed in the environment in accordance with the IT organization's defined and documented procedures.
3. Service request management — The tool is evaluated based on the ability to present an online portal to business end users who are requesting help from the IT service support organization in the forms of incident reports, change requests, IT component ordering or administration.
4. IT knowledge management — The tool is evaluated on its ability to collect, store and access information about IT services to enable the I&O organization to better manage IT service assets through their life cycles. The service knowledge portal should enable user self-service so that end users may resolve simple incidents themselves.
5. Reporting and dashboards — The tool is evaluated on its ability to provide trend reports that measure operational productivity across core processes. Dashboard and reporting capabilities must be tied to business value metrics, common critical success factors and key performance indicators. The tool must offer multidimensional charts that show how related metrics affect each other.
6. Out-of-the-box best practices — The tool is evaluated on the quality of preconfigured workflows in accordance with industry best practices and the ease of use with respect to modifying those workflows as needed.
7. Integration with other data sources and ITOM tools — The tool is evaluated on its out-of-the-box integration capabilities to link to IT asset management (ITAM) processes, the IT service catalog, IT financial management (ITFM) tools, enterprise communications applications (ECA) tools, APM, network fault and performance monitoring, and client management tools.
8. Integration with telephony and communications infrastructure, unified communications and collaboration (UCC) platforms — The tool is evaluated on its ability to integrate with telephony, multiparty conferencing, messaging, presence/IM, software clients in UCC suites and communication applications (such as Emergency Mass Notification System [EMNS]).

Overall Viability: We consider the vendor's company size, market share, financial performance and strategy (such as its revenue growth and profitability). We review the viability of the business unit supporting its ITSSM tool offering, as well as the larger organization. Our analysis reflects the vendor's ability to ensure the continued vitality of its ITSSM tool offering.

Sales Execution/Pricing: We evaluate the vendor's ability to provide global sales support that aligns with its marketing messages. We consider the vendor's ability to demonstrate a motivated,

direct sales force, as well as an experienced and sufficient technical sales support organization. We evaluate its ability to sell and market the product globally.

Market Responsiveness/Record: We evaluate the execution on delivering and upgrading products consistently, in a timely fashion, and meeting road map timelines. We also evaluate the vendor's agility in meeting new market demands, how well the vendor receives customer feedback and how quickly it builds suggestions into the product.

Marketing Execution: This is a measure of brand and mind share through client, reference and channel partner feedback. We evaluate the degree to which customers and partners have a positive identification with the ITSSM product, and whether the vendor has credibility in this market.

Customer Experience: We evaluate the vendor's reputation in the market, based on customers' feedback regarding their experiences working with the vendor. (Were they glad they chose the vendor's product, and do they plan to continue working with the vendor?)

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	High
Market Responsiveness/Record	Medium
Marketing Execution	Medium
Customer Experience	Medium
Operations	Not Rated

Source: Gartner (August 2014)

Completeness of Vision

Market Understanding: The vendor should have a strong, clear understanding of the market direction and opportunities. Market understanding should drive innovation in the product and the development of functions beyond the traditional IT service desk set. Using partners to provide capabilities indicates some market understanding, but the optimal understanding is indicated by direct dedication to the new opportunity. The market requirements map to the market overview discussion and look for:

- Mobile capabilities that enable basic issue capture, update, approval, resolution, functions and access to performance metrics. This will impact how well the product takes advantage of

mobile-specific features, such as location awareness, proactive delivery of information, camera/scanning, and other situational and environmental information.

- Social capabilities that enable collaboration around a shared purpose. The product should be able to capture information from unstructured workflows and make information reusable to link people, tasks, tools and other resources.
- Creative visualization capabilities that provide reference and context data as an integral part of a feedback loop. This helps enforce desired behaviors and provides transparency of progress toward a defined goal.
- Functions that assist service brokers in the integration of service delivery across multiple providers (regardless of who manages the contract) throughout the line of service. This goes beyond traditional approaches to vendor management.

Marketing Strategy: We evaluate the vendor's capability to deliver a clear and differentiated message that maps to market demands, and, most important, the vendor's commitment to the ITSSM tool market through its website, advertising programs and positioning statements.

Sales Strategy: We evaluate the vendor's approach to selling ITSSM tools to I&O leaders directly or through partners.

Product Strategy: We evaluate the breadth of ITSSM tool functionality, specifically looking at these aspects of the product:

- Intuitiveness and consistency of the graphical user interface
- Ease of version-to-version upgrades
- Ease of configuration
- Ease of customization

Business Model: We evaluate whether the vendor continuously manages a well-balanced business case that demonstrates the appropriate funding and alignment of staffing resources necessary to succeed in this market.

Innovation: This criterion includes product leadership and the vendor's ability to deliver ITSSM tool features and functions that distinguish the vendor from its competitors. Specific considerations include resources available for R&D and the innovation process.

Geographic Strategy: We evaluate the vendor's ability to meet the sales and support requirements of IT organizations worldwide. In this way, we evaluate the vendor's strategy to penetrate emerging markets. We also evaluate the vendor's strategy around potential markets in:

- North America
- South America
- EMEA

- Asia/Pacific region (including Japan)
- Australia
- Brazil, Russia, India and China

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	High
Marketing Strategy	High
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Not Rated
Innovation	High
Geographic Strategy	High

Source: Gartner (August 2014)

Quadrant Descriptions

Leaders

BMC and ServiceNow are positioned in the Leaders quadrant. Both vendors have executed well, and own 29% and 21%, respectively, of the ITSSM market. Both vendors exhibit the levels of marketing and sales capabilities required to drive market acceptance.

Challengers

CA Technologies and Cherwell Software are positioned in the Challengers quadrant. Both vendors have also executed well, growing their market share and improving their ITSSM products and their overall viability levels enough to participate well in the general-purpose market with competitive products.

Visionaries

Axios and Landesk are positioned in the Visionaries quadrant. Both vendors deliver innovative products that address operationally important I&O organizational challenges — namely, business-user engagement and IT collaboration — but have yet to gain significant market or mind share.

Niche Players

EasyVista, HP, Hornbill, IBM, FrontRange, ManageEngine, SysAid and TOPdesk are positioned in the Niche Players quadrant. Niche Players have strengths in particular areas of ITSSM, but generally have not invested in satisfying all the requirements to demonstrate Completeness of Vision and the Ability to Execute. The vendors in this quadrant focus on a small segment, or are in the process of ramping up go-to-market efforts and have yet to develop the vision to break out.

Context

A variety of ITSSM functions were available as disjointed tools for decades before Gartner identified ITSSM as an individual tool in 2012. The functions are coming together in integrated products that address ITSSM functionality from a combined perspective of people, processes and tooling.

ITSSM tools offer tightly integrated processes and functions that correlate with the activities of the broader IT support organization. They provide incident and problem management capabilities for the IT service desk function. They also provide change, configuration and release management capabilities for process leaders, infrastructure engineers and domain administrators. Often, this includes the use of a CMDB that enables the IT support organization not only to understand the production environment, but also to prioritize and quickly resolve or escalate issues and problems, and improve root cause isolation.

To help I&O leaders meet their responsibilities for integration across all technology silos, ITSSM tools provide initial visibility into the issues that plague the IT production environment. The tools offer other, broader functionality that help I&O leaders assign tasks within other functional areas to resolve the underlying causes. The appropriate use of these tools, combined with formalized processes and having the right resources in place, can increase efficiency within the I&O group's service and support functions.

Organizations should not base their choice of vendor solely on its proximity to the Leaders quadrant. Instead, IT leaders should create a list of criteria that describes their needs, and then select the vendors that best meet those requirements. The most appropriate vendor is the one that meets the organization's individual requirements and provides the ideal integration with broader IT operations management functionalities (see "ITSSM Tool Selections Require an ITSM and ITOM Tooling Strategy").

Work with a vendor that concentrates on the ITSSM market and can meet your needs for at least the next five years. Focus on skills, training, process and proper product implementation, because these factors will influence your experience with a product more than the specific functional capabilities. Finally, select a vendor that can truly help your I&O organization reach its maturation goals.

Market Overview

The market for ITSSM tools is segmented according to the vendors' abilities to provide strong ITSSM capabilities and high levels of ease of integration with broader IT operations management functionalities.

On average, I&O organizations replace their ITSSM tools once every five years. Many times, they don't understand how to make purchases that address their current needs and future requirements. This is largely due to the absence of I&O improvement road maps, which baseline the current state and outline the people, processes and technology resources needed to reach the desired state. Without a road map, I&O organizations often purchase ITSSM tools that either have more capabilities and functionality than the organization is prepared to optimally utilize (thus incurring higher costs), or that lack the capabilities or integration abilities needed as the organization matures its processes (see "How to Get More Value and Avoid Overspending on IT Service Support Management Tool Purchases"). ITSSM vendors are keenly aware of this shortcoming, and are competing aggressively not only to win new business, but also to develop or partner for broader ITSSM capabilities and integrations with other ITOM functions.

Evaluating their ITSSM capabilities and ease of integration with broader ITOM functions provides a basic, intermediate, and advanced structure for classifying ITSSM tools:

- Basic vendors have some ITSSM capabilities and a limited range in their ability to integrate with basic third-party ITOM solutions.
- Intermediate vendors have good ITSSM capabilities, and more range in their ability to provide broader ITOM or integrate with intermediate third-party ITOM solutions.
- Advanced vendors have a full range of ITSSM capabilities, and provide broader ITOM functionality or integrate with advanced third-party ITOM solutions.

Organizations at lower levels of I&O maturity will find value in basic or intermediate tools, which are abundant. Organizations that are set on achieving higher levels of maturity will place higher value on integration and will work with a narrower subset of the market.

The requirement for advanced ITSSM tools will become more apparent as IT organizations mature. However, the predominance of low I&O maturity within this market will ensure that demand for basic tools remains significant. In that context, we regularly advise clients to consider good ITSSM vendors not found in this Magic Quadrant, including (but not limited to):

- Absolute Software
- Citrix
- Dell Kace
- HelpSTAR
- IssueTrak
- ITinvolve

- ITRP
- Monitor 24-7
- Nilex
- Omninet
- OTRS
- Samanage
- Spiceworks
- SunView Software
- Serena Software
- Microsoft
- Vivianto
- Wendia

Gartner analysts are available to assist with evaluations and comparisons of these companies and products.

Gartner Recommended Reading

Some documents may not be available as part of your current Gartner subscription.

"How Markets and Vendors Are Evaluated in Gartner Magic Quadrants"

"Vendor Rating: BMC Software"

"SWOT: BMC Software, ITOM Software, Worldwide"

"Vendor Rating: CA Technologies"

"Vendor Rating: HP"

"Vendor Rating: IBM"

"SWOT: ServiceNow, IT Operations Management Software, Worldwide"

"Critical Capabilities for IT Service Support Management Tools, 2014"

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

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