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Magic Quadrant for IT Service Support Management Tools

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Summary

IT service support management tools are vital for infrastructure and operations organizations to manage support and delivery of IT services. This research profiles key vendors of enterprise ITSSM tools to help I&O leaders make better selections.

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 facilitate the tasks and workflows associated with the management and delivery of quality IT services. These are most heavily used by IT service desks and IT service delivery functions.

ITSSM tools are classified based on IT service management (ITSM) capabilities and integration with IT operations management (ITOM) solutions (see "ITSSM Tool Selections Require an ITSM and ITOM Tooling Strategy") and include:

  Basic ITSSM tools that have some ITSM capabilities and limited integration with ITOM solutions

  Intermediate ITSSM tools that have good ITSM capabilities, and provide some basic ITOM functions or integrate with intermediate third-party ITOM solutions

  Advanced ITSSM tools that have a full range of ITSM capabilities, and provide broad ITOM functionality natively or integrated with advanced third-party ITOM solutions

More than 450 vendors [1] offer ITSSM products, but the majority are basic or intermediate tools that focus on IT service desk and ticketing functions targeted at lower maturity I&O organizations. Some innovation occurs in advanced ITSSM tools, but these are aimed and priced to suit organizations that have mastered core ITSSM functions and are willing to spend more to expand their capabilities. Vendors are increasingly concentrating product development on non-I&O use cases as market saturation of basic and intermediate ITSSM tools continues (see "Be Wary If Buying an ITSSM Tool to Use Beyond ITSM 2.0"). If this trend continues, the market for ITSSM tools will stagnate.

ITSSM tools are a component of the IT service management 2.0 IT operations management tools minisuite (see Note 1). The ITSM 2.0 minisuite focuses on improving the overall level of quality and efficiency with which the I&O organization supports business users. ITSSM tools may optionally integrate with other tools from the automation minisuite or the availability and performance minisuite for deeper overall ITOM capability (see "Choose IT Operations Management Tools Based on Your Requirements").

Magic Quadrant

Figure 1. Magic Quadrant for IT Service Support Management Tools

Source: Gartner (August 2016)

Vendor Strengths and Cautions

Axios Systems

Axios Systems offers one ITSSM product called assyst that is targeted at organizations with high I&O maturity. This tool is evaluated in the Critical Capabilities companion research.

STRENGTHS

Axios Systems concentrates exclusively on providing ITSSM solutions.

Axios Systems has maintained good relationships with customers and has introduced a customer engagement program including regular postsales meetings in addition to focus groups, customer meet-ups and online forums.

Most customers have updated to recent versions of assyst, demonstrating a continuing investment in the product.

CAUTIONS

Axios Systems has invested in a SaaS platform that relatively few of its customers are using.

Growth in customer numbers and revenue have lagged the industry during the evaluation period for this research.

The majority of Axios' customers and marketing efforts are focused on Europe primarily and North America secondarily; it has limited presence in other regions.

BMC

BMC offers four ITSSM products (Remedy Service Management Suite targeted at high-I&O-maturity organizations, Remedyforce and FootPrints targeted at intermediate I&O maturity, and Track-It for basic I&O maturity). Remedy ITSM Suite and Remedyforce are evaluated in the Critical Capabilities companion research, with the score for Remedy contributing to the "product or service" factor of Ability to Execute.

STRENGTHS

BMC Remedy's Smart IT user interface improves usability and flexibility, and demonstrates BMC's innovation in this market.

BMC has a broad ITOM portfolio, making it a viable partner for mature I&O organizations that need to extend their ITSSM tool.

BMC has the largest enterprise ITSSM customer base available for ongoing nurturing and upsell opportunities.

CAUTIONS

BMC's sales teams tend to be less responsive compared with the competition, and Remedy frequently drops off these shortlists of Gartner clients.

In February 2016, Salesforce stopped selling Remedyforce, thereby removing a key sales partner for BMC's midmarket SaaS product.

Customers that upgraded to FootPrints 12 have reported dissatisfaction with the usability and performance of the product.

CA Technologies

CA Technologies offers one ITSSM product called CA Service Management that is targeted at organizations with high I&O maturity. This tool is evaluated in the Critical Capabilities companion research.

STRENGTHS

CA Technologies has a strong global reach supported by a good balance of selling directly and through partners with whom customers report good experiences.

CA Technologies has invested in research to study employee personas and behavior to better understand how it can improve the user experience of its products.

CA remains a well-known brand with high levels of market awareness.

CAUTIONS

The benefits of CA Technologies' research into user experience that started in early 2015 did not materialize in time for the evaluation period for this research.

CA Technologies has stopped selling CA Cloud Service Management directly to new customers, which leaves the company with a weakened SaaS-based ITSSM tool strategy.

Gartner's market share analysis concludes that CA Technologies' share of the ITSSM market revenue has consistently declined each year from 2010 through 2015.

Cherwell Software

Cherwell Software offers one ITSSM product called Cherwell Service Management that is targeted at organizations with medium I&O maturity. This tool is evaluated in the Critical Capabilities companion research.

STRENGTHS

Cherwell has continued to drive good customer engagement and attract a loyal following.

Cherwell has increased its capabilities in wider ITOM functions with enhancements to Cherwell Asset Management, and close partnership with FireScope for features such as discovery and dependency mapping.

Cherwell has introduced alternative SaaS hosting via Microsoft Azure to provide enterprise performance, security and privacy to customers with a global footprint.

CAUTIONS

Customers in search of additional ITSSM capabilities, beyond what Cherwell offers in its core ITSSM product, may need to license additional capabilities from third parties, which can lead to additional costs.

Cherwell's efforts to additionally develop and market its product as a platform for business activities outside of ITSSM may lead to a lack of focus on the ITSSM market in the future.

Customers in some regions report difficulty in sourcing implementation partners for Cherwell's ITSSM products.

EasyVista

EasyVista offers one ITSSM product called EasyVista IT Service Manager that is targeted at organizations with medium I&O maturity. This tool is evaluated in the Critical Capabilities companion research.

STRENGTHS

EasyVista has added support resources in North America, which has resolved language issues reported by customers in previous years.

EasyVista's customers have reported success in configuring workflows and custom forms within the tool without needing to write code.

EasyVista IT Service Manager can run on-premises and via SaaS, and the installed customer base is uncommonly well-balanced across both modes.

CAUTIONS

Revenue growth is modest, but EasyVista is not keeping up with market leaders in terms of sales performance.

EasyVista invests relatively little of its revenue in research and development compared with its competitors.

EasyVista has limited presence in Asia; its focus is stronger in Europe and improving in North America.

Heat Software

Heat Software offers one ITSSM product called Heat Service Management that is targeted at organizations with medium I&O maturity. This tool is evaluated in the Critical Capabilities companion research.

STRENGTHS

Heat Software is marketing effectively through channels that cater to organizations with low to medium I&O maturity.

Heat makes effective use of sales partners to close a good number of lower-value deals without expending many sales cycles.

Heat improved customer satisfaction through initiatives such as annual customer advisory boards, which allows customers to provide input influential to the future direction of the product.

CAUTIONS

An appreciable number of customers are using older versions of Heat Software's ITSSM product, and often chose to switch to competing products rather than upgrade.

Heat Software's marketing of its ITSSM product as "cloud service management" is confusing as it does not actually provide cloud management software.

Despite the cloud branding and investment in a multitenancy SaaS platform, few of Heat's customers are using the tool via the cloud subscription offering.

HPE

Hewlett Packard Enterprise (HPE) offers two ITSSM products (HPE Service Manager and HPE Service Anywhere) that are targeted at organizations with high to medium I&O maturity, respectively. Both are evaluated in the Critical Capabilities companion research, with HPE Service Manager's score contributing to the "product or service" factor of Ability to Execute.

STRENGTHS

HPE has a strong brand and global reach, with its professional services organization available in all major regions.

HPE offers a broad portfolio of ITOM tools that integrate directly with its ITSSM products.

HPE's big data capabilities enable its customers to improve search and analytics in areas such as incident management, change management and knowledge management.

CAUTIONS

ITSSM is a minor part of HPE's software portfolio, and Gartner's market share analysis concludes that HPE's share of the ITSSM market revenue has declined each year from 2009 through 2015.

Customers report concerns that HPE Service Manager is not getting sufficient attention as investment in research and development has focused on Service Anywhere and other products.

Many of HPE's ITSSM customers are running older versions of HPE Service Manager, and many of those customers have not updated recently.

IBM

IBM offers one ITSSM product called Control Desk that is targeted at organizations with high I&O maturity. This tool is evaluated in the Critical Capabilities companion research.

STRENGTHS

IBM maintains its strength through its ability to sell into its existing customer base.

IBM has extensive global partnerships and resources in Europe and Asia where many other vendors lack significant local presence.

IBM has an opportunity to leverage Watson technology for artificial intelligence and service desk automation purposes.

CAUTIONS

IBM has not developed Control Desk to compete aggressively in the ITSSM tools market, and it rarely appears on client shortlists.

A majority of IBM's ITSSM customers are running older versions of its ITSSM product.

IBM primarily markets Control Desk to existing IBM customers, and often relies on it being sold as part of a larger outsourcing or ITOM purchase.

Landesk

Landesk offers one ITSSM product called Landesk Service Desk that is targeted at organizations with intermediate and high I&O maturity. This tool is evaluated in the Critical Capabilities companion research.

STRENGTHS

Its Total User Management suite that includes the Service Desk product gives Landesk a solid portfolio of ITSSM tools backed by good automation for enterprise devices.

Landesk continues to expand its workspace initiative to provide a unified user experience across the range of its products.

Landesk has been active in seeking to improve its software portfolio in the ITSM 2.0 minisuite, via acquisitions of Xtraction Solutions and AppSense during the past year.

CAUTIONS

Landesk's acquisition of Xtraction in late 2015 has yet to result in fully integrated improved reporting capabilities for its ITSSM toolset.

Despite an increase in ITSSM marketing efforts, Landesk is still commonly recognized for endpoint management but not for its ITSSM portfolio.

Landesk has invested in a dual-licensing model where the tool can be provided either on-premises or in the cloud, but relatively few of its customers are using the SaaS option.

ServiceNow

ServiceNow offers two ITSSM products (ServiceNow Service Management Suite and ServiceNow Express) that are targeted at organizations with high and low I&O maturity, respectively. ServiceNow Service Management Suite is evaluated in the Critical Capabilities companion research, with its score contributing to the "product or service" factor of Ability to Execute.

STRENGTHS

ServiceNow dominates customer shortlists, making it the prime target for technology and implementation partners, and subsequently resulting in a wide choice for its customers.

ServiceNow has improved wider ITOM capabilities through the maturation of earlier acquisitions (Neebula, rebranded as ServiceWatch and Mirror42, rebranded as Performance Analytics).

ServiceNow Express (which offers an upgrade path to the Enterprise product without reimplementation) has been integrated into the main product strategy, and we have seen better penetration into the midmarket as a result.

CAUTIONS

Recent changes in pricing and the bundling of noncore product features make it confusing for ServiceNow's customers to negotiate favorable deals.

ServiceNow's strategy to promote its products for activities outside of ITSM 2.0 suggests a relative lack of focus on its core ITSSM tool in terms of ongoing research and development.

On-premises customers pay the same as SaaS customers, even though they cover the hosting directly and do not benefit from automatic upgrades.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant 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

IBM

Dropped

Hornbill

Inclusion and Exclusion Criteria

For inclusion in the 2016 Magic Quadrant for ITSSM tools, Gartner focuses on vendors that offer not only IT service support functions that focus on product usability and the ease of use of out-of-the-box best practices, but also next-generation support capabilities specific to mobility and the use of social collaboration capabilities to increase effectiveness and efficiency levels.

To be included in the 2016 Magic Quadrant, vendors must:

Sell and market 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 with regard to incident and service requests. Also a graphical process designer must be available to manage the above workflows.

Have at least 35% of customers using versions of software across the ITSSM product portfolio that are less than 18 months old (released after 1 September 2014).

Have at least $19 million in annual revenue derived from ITSSM products.

Have sales presence or a partner network that includes at least two offices (regional office or reseller partner) in each of three or more of the following regions: North America, Latin America, Europe (Western, Eastern and Eurasia), Middle East and North Africa (including sub-Saharan Africa), and Asia/Pacific (Mature, Emerging, Greater China and Japan; Gartner's market definitions for global regions are defined in "Market Definitions and Methodology: IT Markets").

Gartner also asks for five qualifying customer references (with at least two being customers for at least two years); these references should meet the following criteria:

They should involve ITSSM tool solutions for which the customer has paid and which are being used in production environments.

The tools implemented should 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.

They should have an organizational size of at least 5,000 business users of IT.

The references should be located in at least three of the following regions: North America, Latin America, Europe (Western, Eastern and Eurasia), Middle East and North Africa (including sub-Saharan Africa), and Asia/Pacific (Mature, Emerging, Greater China and Japan).

Because Gartner bases its main evaluation on real user experiences, rather than on future releases or recent releases that have been broadly tested, the product versions considered as part of this evaluation must have been generally available by 1 March 2016.

Evaluation Criteria

Ability to Execute

Product or 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 these 11 critical capabilities:

1. **Incident and Problem Management:** Incident ticketing and problem management is required by all IT organizations that use ITSSM tools. This enables them to manage the life cycles of IT incidents and problem records from recording to closing. These are core capabilities in which all ITSSM tools must be competent.

2. **Change and Release Management:** Integrated change and release management is important for organizations focused on intermediate and advanced IT service support capabilities to control the governance and risk of changes to I&O.

3. **Configuration Management:** Configuration management is important for organizations focused on intermediate and advanced IT service support capabilities to maintain an overview of service assets to aid other processes such as change and incident management.

4. **Self-Service/Request Fulfillment:** Service request fulfillment is important for IT organizations focused on providing business users with a convenient way to interact with the IT organization by presenting incident and request tracking services, technical IT components and IT services in the form of an orderable service catalog.

5. **IT Knowledge Management:** Knowledge management is a key area of differentiation for all use cases. The knowledge portal should enable end users to resolve simple incidents themselves. The tools should create knowledge bases for relevant, updateable content that is useful for IT and business users.

6. **Collaboration:** Collaboration features are key for digital workplace use cases to help IT staff work together to solve IT incidents and problems, to enable business users to solve their own IT issues and also for those business users to help colleagues.

7. **Reporting and SLA Management:** Reporting and dashboards are key for all use cases, because they support, enhance and extend collaborative decision support (strategic and tactical) and communication with IT and business leaders.

8. **Process and Workflow Design:** IT organizations in all use cases need out-of-the-box, preconfigured forms, fields, workflows and reports that are compatible with industry best practices and standards for IT service support.

9. **Data Source/ITOM Tool Integration:** The tools' ability to integrate with other tools and the ability of those tools to integrate with ITSSM tools is increasingly important, particularly for organizations that use software from other ITOM minisuites.

10. **Total Cost of Ownership:** License and subscription costs for ITSSM tools vary considerably, as do ongoing costs for support and administration. Many organizations overbuy when selecting an ITSSM tool.

11. **User Experience and Flexibility:** Product configuration flexibility is an important factor that distinguishes different ITSSM tools for different maturity levels. IT service desk users, in particular, benefit from a streamlined and intuitive UI.

These product criteria are evaluated in the critical capabilities research for IT service support management tools (see "Critical Capabilities for IT Service Support Management Tools"). The critical capabilities score for the ITSSM product that is targeted at large enterprises with medium-to-high I&O maturity is used where multiple products from a vendor qualify for inclusion in that research.

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.

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 2016)

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.

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.

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 2016)

Quadrant Descriptions

Leaders

BMC and ServiceNow are positioned in the Leaders quadrant. Both vendors have executed well, and own 21.3% and 34.4%, respectively, of the ITSSM market. Both vendors exhibit the levels of marketing and sales capabilities required to drive market acceptance.

Challengers

Cherwell Software is positioned in the Challengers quadrant. This vendor has also executed well, growing its market share and improving its ITSSM products and its overall viability levels enough to participate well in the general-purpose market with competitive products.

Visionaries

Vendors appearing in this quadrant 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. This year, no vendors fit this description as they have focused on innovation outside the scope of ITSSM tools.

Niche Players

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

The Magic Quadrant for ITSSM tools assesses the viability of vendors and their competitive strength in the ITSSM marketplace. The vendors featured here produce ITSSM tools that are of interest to large I&O organizations that have an intermediate-to-high I&O maturity (Gartner ITScore for Infrastructure and Operations of 2.5 or higher).

It is not a direct evaluation of the ITSSM products that these vendors offer. This analysis complements the "Critical Capabilities for IT Service Support Management Tools," which applies nine critical capabilities that differentiate the most popular large-enterprise-focused products on the market, and three I&O-maturity-related use cases (plus one for digital workplace). The use cases filter and prioritize the capabilities that will have the greatest beneficial impact of ITSSM products offered by these vendors. Gartner strongly recommends that organizations use this research in conjunction with the Critical Capabilities, inquiries with analysts, and other Gartner research to define their requirements and select solutions that match their needs.

Organizations should not base choice of vendor solely on its proximity to the Leaders quadrant. IT leaders must create a list of criteria that describes their needs, and select vendors that best meet those requirements (see "Redesign Your ITSSM Tool RFP Process for Better Results"). The best vendor will meet the organization's requirements and provide integration with broader IT operations management capabilities (see "ITSSM Tool Selections Require an ITSM and ITOM Tooling Strategy").

Capabilities for processing workflows such as HR, facilities, business asset management and others that are not activities associated with IT service support management are not evaluated in this research (see "Be Wary If Buying an ITSSM Tool to Use Beyond ITSM 2.0").

Plan to select a vendor that can work with you for at least five years, and that invests in the ITSSM market. Prioritize 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.

The predominance of low I&O maturity within this market will ensure that demand for basic tools remains significant. Gartner regularly advises clients to also consider ITSSM vendors not found in this Magic Quadrant.

Market Overview

The IT service support management tool market consists of more than 450 products that claim to provide IT organizations with the ability to track and resolve issues that affect the IT production environment. [1] Although all ITSSM tools provide those core ticketing functions, the true value that IT organizations can gain from ITSSM tools comes from their ability to offer and support tightly integrated processes and functions that correlate with the activities of the broader IT organization. I&O organizations looking to increase IT process maturity have looked to ITSSM tools aligned with and preconfigured to industry best-practice frameworks — to integrate responsibilities across technology silos with common processes, collaboration and the reinforcement of an organizational commitment to shared objectives.

ITSSM tools integrate processes and functions that correlate with the broader IT support organization. Features should include incident and problem management capabilities for the IT service desk function, and change, configuration and release management tools for process leaders, infrastructure engineers and domain administrators. They often include a configuration management database (CMDB) that provides change management impact assessment and visibility into service configurations for speeding service restoration. The ITSSM tool market has grown from $1.3 billion in 2010 to $2.2 billion in 2015. [2]

ITSSM tools are a component of the ITSM 2.0 IT operations management tools minisuite (see Note 1). The ITSM 2.0 minisuite focuses on improving the overall levels of quality and efficiency with which the I&O organization supports end users. ITSSM tools may optionally integrate with other tools from the automation minisuite or the availability and performance minisuite for deeper overall ITOM capability (see "Choose IT Operations Management Tools Based on Your Requirements").

Many I&O organizations don't adequately understand how to choose ITSSM tools that address current needs and requirements. This is due to a lack of I&O roadmaps that establish the people, processes and technology resources needed to reach the desired state of I&O maturity. Without a roadmap, I&O often purchases ITSSM tools that have more functionality than it needs (incurring higher costs), or that lack the capabilities or integration abilities it will require as it grows (see "IT Service Support Management Tool Acquisitions Must Be Based on I&O Maturity"). ITSSM vendors are keenly aware of this and compete aggressively for new business and for partnerships for broader ITOM capabilities and integrations.

Evidence

[1] As of 17 June 2016, ITSM Portal shows 415 products. Although some are duplicates, there are products that Gartner has encountered that are currently missing from that list.

[2] Gartner's report "Market Share: All Software Markets, Worldwide, 2015" analyzes market share data for ITSSM vendors as part of overall IT operations software revenue. This market has grown from $1.3 billion in 2010 to $2.2 billion in 2015.

Based on 515 inquiries with Gartner clients purchasing ITSSM tools during the past 18 months. In addition, Gartner collected ITSSM tool statistics from anonymized client inquiries detailing ITSSM tools in use, scheduled for replacement and on shortlists for selection.

Note 1
Minisuites

Minisuites are composed of a small number of tools that address a defined need (for example, end-user management, server provisioning or configuration) or specific IT operations processes (for example, incident and problem management), or that are aimed at a specific user or buying center (for example, network administration). Minisuites can also reflect how vendors group, integrate, market and sell their products.

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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