Project Forte – selected survey slides

BAIN & COMPANY

Forte greenfield vs. switching consideration | Forte has been winning more jump balls over time across greenfield and brownfield opportunities

Forte has been a top vendor for new adopters, along with Atlassian Jira service Mgmt.and ServiceNow

Forte has also been improving with brownfield opportunities over time

Q: Prior to adopting <vendor>, what type of IT Service Management (<ITSM>) solution did your organization use?
Q: In what year did your company begin using primary vendor?

Type of ITSM used before adopting primary vendors in a given year (% of respondents)
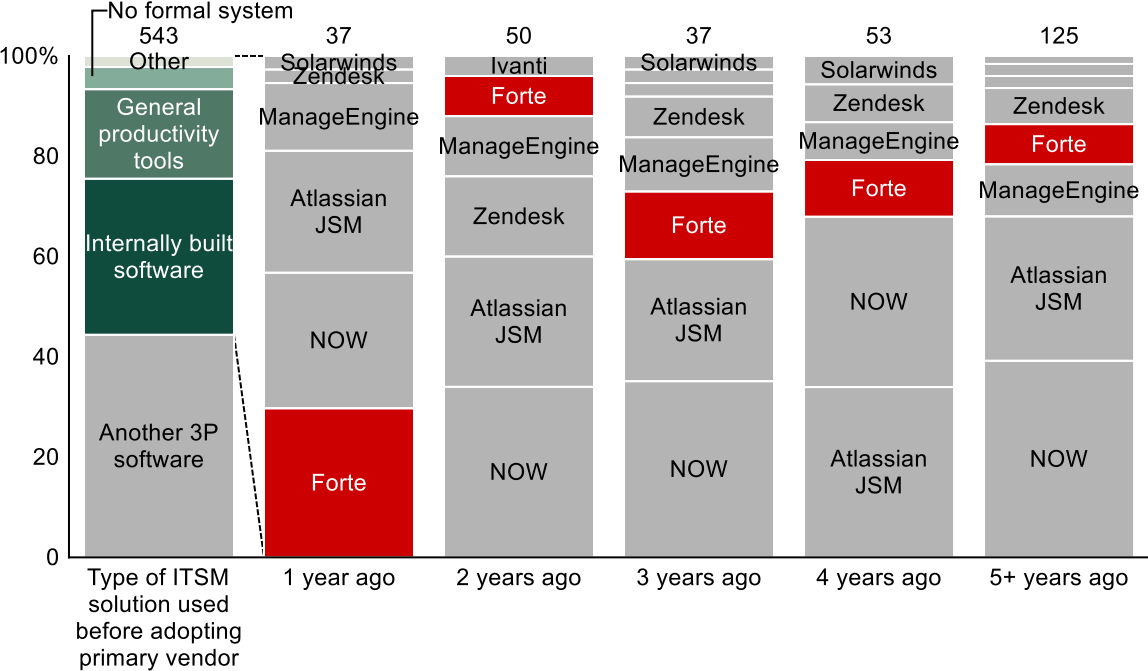
Type of ITSM used before adopting primary vendors in a given year (% of respondents)
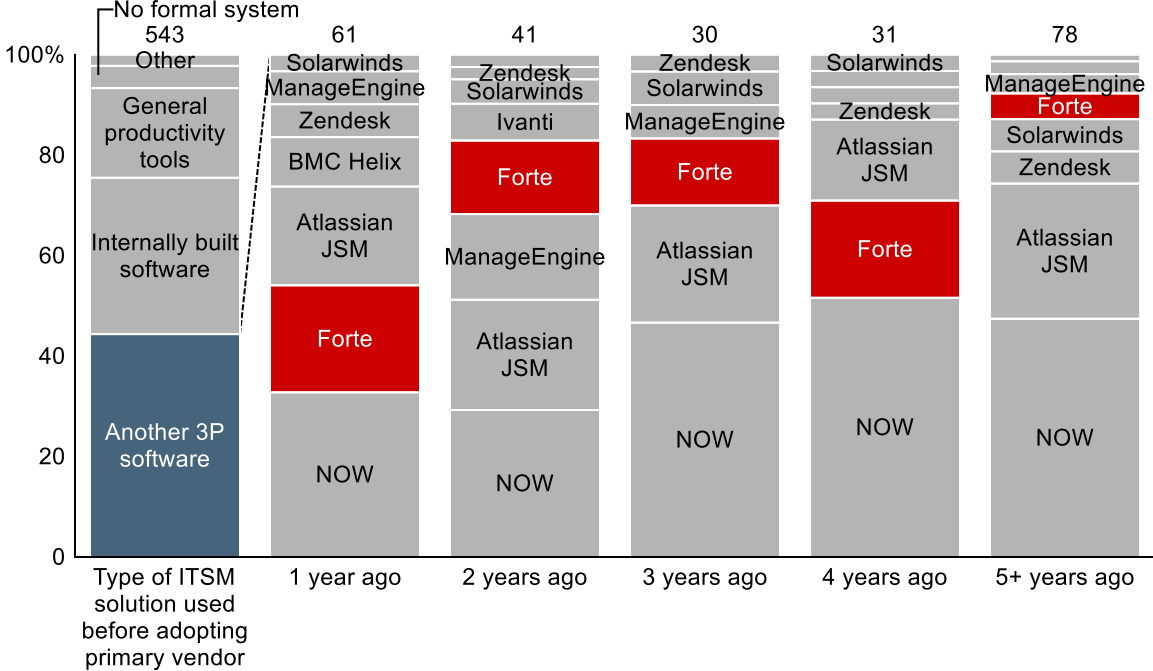
Note: Respondents marking "Unsure" have not been shown on the first bar of both the charts
Source: Project Forte Survey (N=665)

Forte alternatives | When customers consider alternatives to Forte, they are often evaluated against NOW, Zendesk, JSM and ME

COMPETITIVE LANDSCAPE **CONSIDERATION SET** *Current Forte users only* **/ PRELIMINARY**

Forte evaluated against NOW, JSM, ME, and Zendesk across segments

*Q: Which **other vendors did you consider** along with <vendor> at the time of your most recent purchase or reevaluation?*

Other vendors considered (among current Forte users)	Micro (N=5)	SMB (N=28)	Lower MM (N=18)	Upper MM (N=17)	Enterprise (N=3)
servicenow	60%	57%	50%	59%	100%
Jira Service Management	20%	25%	33%	35%	100%
ManageEngine	20%	25%	17%	35%	67%
zendesk	0%	46%	33%	35%	33%
bmc	0%	14%	6%	29%	67%
SolarWinds	0%	7%	22%	12%	0%
ivanti	0%	11%	17%	12%	33%

Legend: 0% | 0-20% | 20-40% | 40-60% | 60%+

Source: Project Forte Survey (N=665); Market participant interviews

Similar consideration across segments

- Forte users also **considered ServiceNow in 50%+ of purchasing occasions** across all segments
  - Market participants often reference considering ServiceNow briefly before disregarding due to cost and complexity
- JSM, ManageEngine, and Zendesk are also frequently evaluated with Forte
  - Given ManageEngine's smaller market share, this implies higher relative overlap between ManageEngine and Forte

*"We were already a Forte customer in other areas and they did an ITSM demo for us. Other than that, **we looked at ServiceNow**, but we didn't do a deep dive because it was clear in the beginning that it would be too expensive and big from us."*
Senior Director of Business Technology, Customer #25

*"ManageEngine is usually evaluated with Forte because we both have **primarily mid-sized customers**."*
Senior Director of Business Technology, Customer #25

*"In addition to Forte, **we evaluated Jira Service Management, Zendesk, and ManageEngine**... I would say Jira was the closest competitor to Forte."*
Director of IT, Customer #23

Consideration and selection | Forte is considered less often than NOW and JSM, but wins ~40% of the time when considered in sweet spot (SMB and MM)

Legend: 0% | 0-20% | 20-40% | 40-60% | 60%+

Forte is only considered in 20-40% of purchasing processes; NOW and JSM are considered most often

*Q: Which **other vendors did you consider** along with <vendor> at the time of your most recent purchase or reevaluation?*

% considered	Micro (N=35)	SMB (N=183)	Lower MM (N=128)	Upper MM (N=125)	Enterprise (N=98)
Forte	23%	39%	38%	37%	20%
servicenow	40%	58%	68%	78%	92%
Jira Service Management	57%	60%	51%	49%	55%
ManageEngine	11%	28%	26%	26%	16%
zendesk	43%	46%	38%	37%	32%
bmc	17%	15%	16%	27%	33%
SOLARWINDS	3%	19%	21%	16%	16%
ivanti	9%	10%	14%	15%	14%

When considered, Forte wins ~40% of the time in sweet spot, but less than NOW and JSM

Implied win rate when considered

% selected of considered	Micro	SMB	Lower MM	Upper MM	Enterprise
Forte	63%	39%	38%	37%	15%
servicenow	50%	40%	51%	56%	77%
Jira Service Management	70%	61%	52%	28%	30%
ManageEngine	25%	31%	42%	39%	25%
zendesk	40%	21%	14%	13%	6%
bmc	0%	11%	15%	26%	13%
SOLARWINDS	100%	21%	22%	30%	0%
ivanti	33%	5%	11%	16%	0%

Source: Project Forte Survey (N=665)

Forte right to win | Forte has stronger right to win with non-Enterprise customers that either 1) prioritize ease of use, or 2) don't use non-JSM Atlassian products

New

COMPETITIVE LANDSCAPE | **RIGHT TO WIN**

Note: Simpler version (removing ease of use prioritization) in appendix

✓ Right to win / **PRELIMINARY**

Primary ITSM vendor (% of respondents)
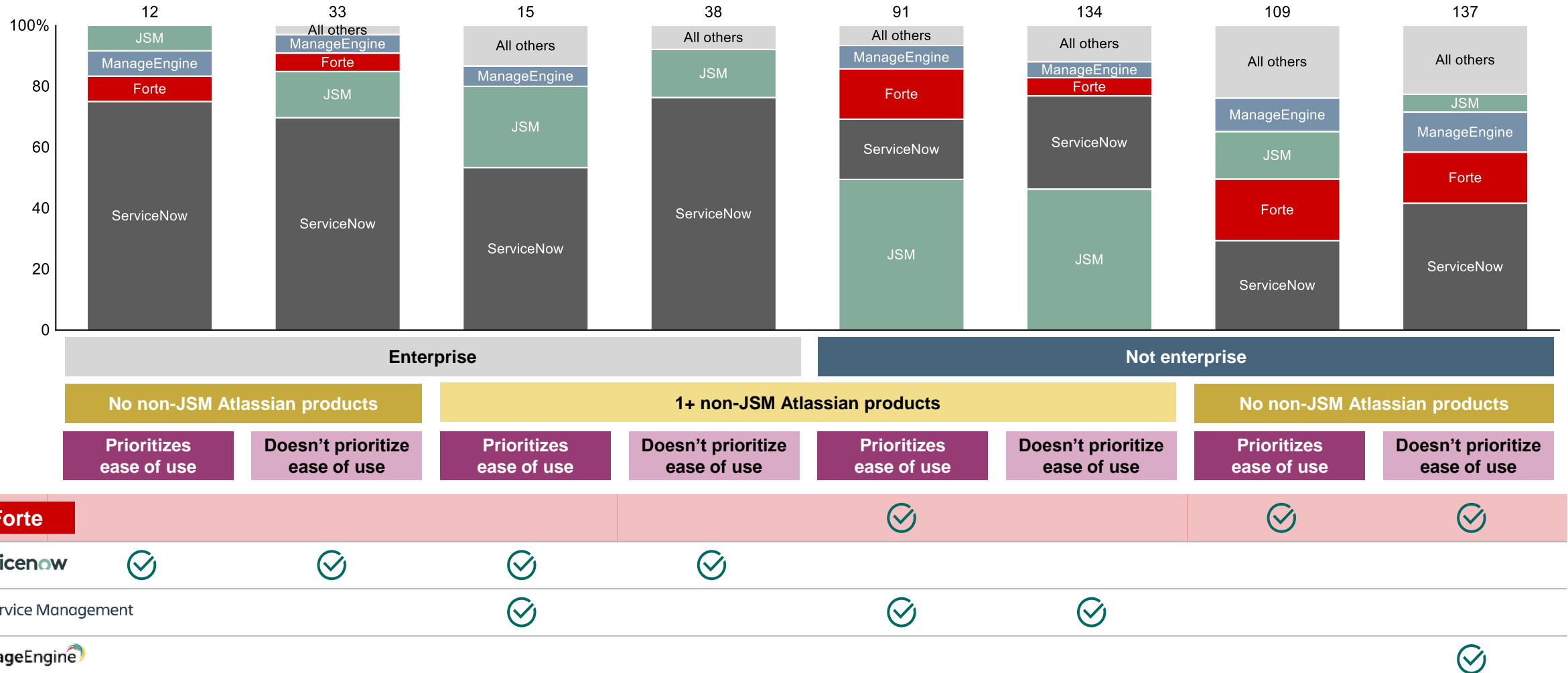
	Enterprise				Not enterprise			
	No non-JSM Atlassian products		1+ non-JSM Atlassian products				No non-JSM Atlassian products	
	Prioritizes ease of use	Doesn't prioritize ease of use	Prioritizes ease of use	Doesn't prioritize ease of use	Prioritizes ease of use	Doesn't prioritize ease of use	Prioritizes ease of use	Doesn't prioritize ease of use
Forte					✓		✓	✓
servicenow	✓	✓	✓	✓				
Jira Service Management			✓		✓	✓		
ManageEngine								✓

Note: "Prioritizes ease of use" defined as rating "Easy to use / intuitive user interface" among top 3 KPCs
Source: Project Forte Survey (N=665)

COMPETITIVE LANDSCAPE — **RIGHT TO WIN**

Note: Simpler version (removing ease of use prioritization) in appendix

Legend: 0% | 0-20% | 20-40% | 40-60% | 60%+

Strong Forte right to win
No non-JSM Atlassian products | Prioritizes ease of use

% considered	Micro	SMB	LMM	UMM	ENT
Forte	0%	42%	53%	38%	42%
servicenow	71%	58%	70%	79%	100%
Jira Service Management	14%	40%	33%	33%	50%
ManageEngine	0%	21%	20%	29%	25%
zendesk	43%	56%	33%	50%	50%
bmc	43%	10%	13%	38%	33%
SOLARWINDS	0%	17%	23%	8%	17%
ivanti	14%	8%	17%	21%	8%

% selected of considered	Micro	SMB	LMM	UMM	ENT
Forte		50%	44%	56%	20%
servicenow	80%	32%	43%	53%	75%
Jira Service Management	100%	68%	30%	0%	17%
ManageEngine		60%	67%	29%	33%
zendesk	33%	26%	30%	25%	0%
bmc	0%	0%	0%	22%	0%
SOLARWINDS		38%	43%	50%	0%
ivanti	100%	0%	20%	0%	0%

Moderate Forte right to win

No non-JSM Atlassian products | Doesn't prioritize ease of use

% considered	Micro	SMB	LMM	UMM	ENT
Forte	50%	50%	35%	32%	18%
servicenow	50%	62%	65%	76%	97%
Jira Service Management	25%	33%	35%	32%	45%
ManageEngine	25%	29%	27%	30%	21%
zendesk	25%	40%	43%	26%	24%
bmc	13%	14%	16%	24%	27%
SOLARWINDS	13%	29%	27%	24%	12%
ivanti	13%	14%	16%	8%	18%

% selected of considered	Micro	SMB	LMM	UMM	ENT
Forte	75%	38%	46%	38%	33%
servicenow	25%	65%	58%	66%	72%
Jira Service Management	50%	21%	31%	0%	33%
ManageEngine	50%	42%	40%	53%	29%
zendesk	50%	35%	19%	15%	0%
bmc	0%	33%	33%	33%	11%
SOLARWINDS	100%	8%	30%	33%	0%
ivanti	0%	0%	17%	25%	0%

1+ non-JSM Atlassian products | Prioritizes ease of use

% considered	Micro	SMB	LMM	UMM	ENT
Forte	33%	42%	35%	53%	20%
servicenow	17%	56%	62%	71%	80%
Jira Service Management	83%	83%	73%	76%	73%
ManageEngine	17%	28%	42%	29%	20%
zendesk	42%	47%	35%	53%	20%
bmc	8%	14%	12%	24%	33%
SOLARWINDS	0%	11%	12%	6%	27%
ivanti	0%	11%	8%	12%	20%

% selected of considered	Micro	SMB	LMM	UMM	ENT
Forte	50%	40%	33%	44%	0%
servicenow	0%	30%	44%	42%	67%
Jira Service Management	70%	67%	63%	46%	36%
ManageEngine	0%	20%	36%	20%	33%
zendesk	60%	6%	0%	0%	33%
bmc	0%	0%	0%	25%	20%
SOLARWINDS		0%	0%	0%	0%
ivanti	25%	0%	0%	0%	0%

Forte disadvantaged
1+ non-JSM Atlassian products | Doesn't prioritize ease of use

% considered	Micro	SMB	LMM	UMM	ENT
Forte	0%	28%	29%	35%	16%
servicenow	38%	58%	74%	82%	89%
Jira Service Management	88%	81%	66%	71%	58%
ManageEngine	0%	35%	17%	18%	8%
zendesk	63%	40%	40%	35%	37%
bmc	13%	21%	20%	26%	37%
SOLARWINDS	0%	18%	20%	15%	16%
ivanti	13%	9%	14%	24%	11%

% selected of considered	Micro	SMB	LMM	UMM	ENT
Forte		25%	20%	17%	0%
servicenow	67%	33%	54%	50%	85%
Jira Service Management	71%	67%	65%	46%	27%
ManageEngine		15%	33%	33%	0%
zendesk	20%	17%	7%	8%	7%
bmc	0%	8%	14%	22%	14%
SOLARWINDS		30%	0%	20%	0%
ivanti	0%	0%	0%	13%	0%

Forte is often selected in sweet spot when it has strong right to win; NOW is selected slightly less often

JSM is highly considered and selected when companies use other Atlassian products; NOW still selected more among enterprise

Forte is not frequently considered or selected when disadvantaged, even in sweet spot segments

Source: Project Forte Survey (N=665)

Forte right to win | Combining preferences for ease of use and where Atlassian isn't present suggests pocket where Forte has a stronger right to win

New

Note: Simpler version (removing ease of use prioritization) in appendix

/ PRELIMINARY

Forte well positioned when strong ease of use preference, no Atlassian sol'n

- Forte has a strong right to win among **non-Enterprise customers** that **do not use other Atlassian products** and that **prioritize ease of use**
    1. Enterprise customers most frequently select ServiceNow
    2. Customers that use other Atlassian products are much more likely to adopt JSM
    3. Forte is selected more when customers value ease of use

- Forte's **competitive edge is reduced** for customers who either use other Atlassian products or do not value ease of use

- With customers that use other Atlassian products and do not prioritize ease of use, **Forte is at a competitive disadvantage**
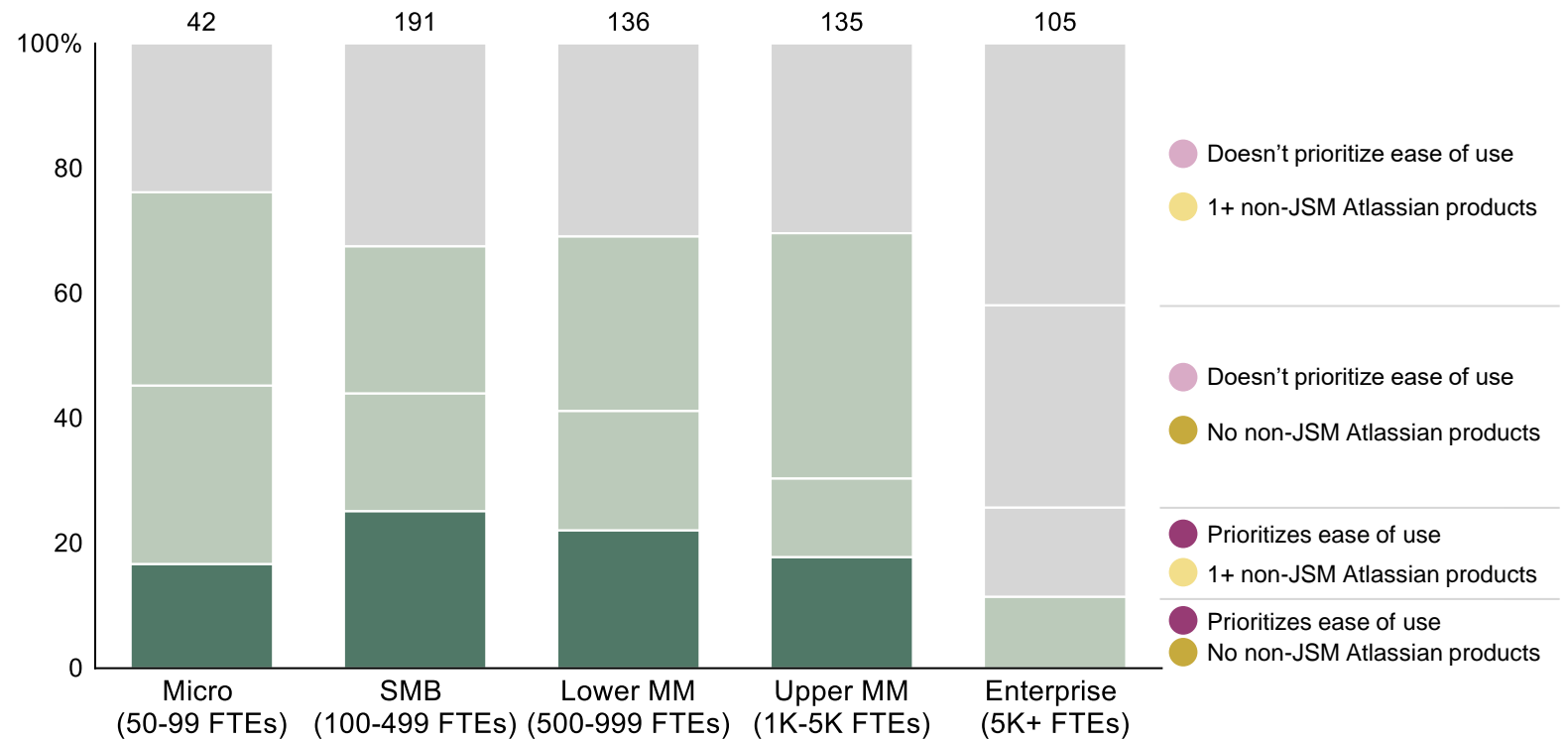
*"Forte wins for features I would say, especially on the UI interface for customers with more general users, because their **interface is very user friendly**."*

Senior Director, EMEA Sales, Competitor #4

Note: "Prioritizes ease of use" defined as rating "Easy to use / intuitive user interface" among top 3 KPCs
Source: Project Forte Survey (N=665); Market participant interviews

In every customer size segment, there are a portion of customers who value ease of use and don't use non-JSM Atlassian products where Forte has a strong right to win

Ranked 'easy to use / intuitive user interface' among top 3 KPCs and uses 1+ non-JSM Atlassian products (% of respondents)

Legend:
- Doesn't prioritize ease of use
- 1+ non-JSM Atlassian products

- Doesn't prioritize ease of use
- No non-JSM Atlassian products

- Prioritizes ease of use
- 1+ non-JSM Atlassian products

- Prioritizes ease of use
- No non-JSM Atlassian products

Chart values (top): Micro 42 | SMB 191 | Lower MM 136 | Upper MM 135 | Enterprise 105

X-axis: Micro (50-99 FTEs) | SMB (100-499 FTEs) | Lower MM (500-999 FTEs) | Upper MM (1K-5K FTEs) | Enterprise (5K+ FTEs)

Legend
- Forte strong right to win
- Forte moderate right to win
- Forte disadvantaged

Forte right to win assumed similar across segments, with the exception of enterprise where larger budgets and ServiceNow competition will never position Forte strongly to win

This information is confidential and was prepared by Bain & Company solely for the use of our client; it is not to be relied on by any 3rd party without Bain's prior written consent

BAIN & COMPANY   7