

Magic Quadrant for IT Service Support Management Tools

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VIEW SUMMARY

IT service support management tools go beyond traditional service desk ticketing and reporting functions to address release governance and provide visibility into the production environment. I&O organizations aspiring to mature can use this research to evaluate products to support their efforts.

Market Definition/Description

This document was revised on 23 August 2013. The document you are viewing is the corrected version. For more information, see the [Corrections](#) page on gartner.com.

IT service support management (ITSSM) tools extend the capabilities of IT service desk tools by providing modules that automate configuration and release governance processes, and provide a business view of IT services. These capabilities enable the IT support organization to manage incidents, problems, changes and service requests throughout their life cycles at a more efficient and effective rate. ITSSM tools also provide capabilities that enable business end users to gain knowledge to support and resolve their computing-related issues or to request an IT service.

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Magic Quadrant

Figure 1. Magic Quadrant for IT Service Support Management Tools



Source: Gartner (August 2013)

As of August 2013



EVIDENCE

¹ As of June 2013, the average I&O maturity level in ITSIO was 2.30.

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

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Vendor Strengths and Cautions

Axios Systems

We reviewed assyst v.10, which can be delivered on-premises or via multitenant software as a service (SaaS: assystSaaS).

Strengths

The product's IT resource performance management (ITRPM) function uses social collaboration, mobility and gamification to connect IT and business users to provide decision support.

Axios continues to demonstrate the ability to introduce rapid releases of new features, which has yielded high levels of customer retention.

The vendor supports open integration with third-party solutions.

Cautions

Although customers are generally satisfied with the offering, some report slower-than-desired turnaround times for technical support.

The product's out-of-the-box reporting capabilities do not directly tie IT operations performance metrics — such as end-user productivity improvement — to critical business success factors. Customers must use assyst's reporting wizard for this capability.

In some regions, Axios lacks the quantity of resources for sales, implementation and integration services, compared with its competitors, resulting in longer lead times for presales and postsales support.

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BMC Software

We evaluated BMC Remedy IT Service Management (ITSM) 8.1 and Remedy OnDemand.

Strengths

Remedy ITSM can be easily integrated with a broader portfolio of BMC IT operations management (ITOM) solutions, specifically the configuration management database (CMDB) to support incident and problem management processes, and to accelerate change and configuration management processes.

BMC Remedy ITSM offers virtual support agent capabilities to enhance IT user self-service and to lessen user dependence on IT support analysts for problem resolution.

BMC Remedy ITSM provides preconfigured best-practice ITIL forms, fields and workflows to accelerate deployments. Customers report fast installs with minimal customization or configuration.

Cautions

BMC Remedy ITSM technician-to-technician social collaboration capabilities are behind the curve; they do not gather enough context to enhance decision support.

Multidimensional and managerial-level reporting capabilities are only available with the BMC Atrium IT Dashboards and Analytics add-on.

BMC Remedy ITSM offers functionality that is best-suited for more mature infrastructure and operations (I&O) organizations; other products in the BMC ITSM solution portfolio may be better-suited for smaller and/or less mature I&O organizations.

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CA Technologies

We evaluated CA Service Desk Manager 12.7.

Strengths

CA Service Desk Manager offers robust change and configuration management capabilities, most notably the change audit and control functionality, unified change calendar/scheduler, electronic change advisory board, and change impact explorer.

The vendor has improved the product's mobile capabilities, including mobile apps for download for access to Service Desk Manager.

CA is now packaging CA Open Space with CA Service Desk Manager. This combination gives enterprises robust social IT management capabilities for peer-to-peer support without additional license fees.

Cautions

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.

Although the vendor provides integration across a broad suite of ITOM solutions, CA Service Desk Manager does not provide a unified view across all IT operations management product consoles.

CA Service Desk Manager is not licensed in a SaaS model. Customers who want a SaaS-based IT service desk solution from CA must opt for the hosted and managed CA Service Desk Manager model or must license Nimsoft Service Desk.

CA Service Desk Manager does not yet include out-of-the-box process frameworks, other than ITIL.

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Cherwell Software

We evaluated Cherwell Service Management (CSM) v.4.3.

Strengths

CSM boasts solid reporting and dashboard capabilities that enable organizations to create multidimensional reporting and business value dashboards.

The CSM Self-Service Portal enables organizations to consolidate multiple portals to drive higher usage levels.

Cautions

Organizations that want to use a business service map must manually model and map IT services to support incident, problem and change management processes.

Even with an expanding partner base, Cherwell is not as globally deployed as its competitors.

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EasyVista

We evaluated the 2012 version of EasyVista.

Strengths

Customers report ease of installation, configuration and customization.

The business intelligence engine helps service desk managers make decisions about service support and delivery by providing predefined simulations without complicated data mining.

EasyVista integrates easily with third-party solutions and with ITOM products from other vendors.

Cautions

The product's social networking capabilities are designed to support internal IT collaboration only.

Customers report that EasyVista's reporting capabilities lack the value-based reporting required to show the business value of the I&O organization.

EasyVista provides basic knowledge management repository capabilities.

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FrontRange

We evaluated Heat Service Management 2012.3.

Strengths

Customers report improvements in how FrontRange provides technical support for new users.

The product provides the ability to enable auditing in the steps within a process workflow, which allows strong governance and process reinforcement for process owners and administrators

Cautions

Heat Service Management fails to provide a consistent overlay to guide IT analysts and engineers through documented processes.

Customers have voiced the need for easier administration and process modification capabilities.

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Hornbill

We evaluated Supportworks ITSM Enterprise v.3.4.14.

Strengths

Supportworks ITSM Enterprise delivers end-user profile information to service desk technicians so they can provide better support experience.

The product includes an integrated third-party tool for business value dashboards that can help more mature I&O organizations become better aligned with business initiatives.

Supportworks has native social collaboration capabilities. The Social Insight function provides real-time visibility into social activities to reveal hidden relationships, undocumented processes and sentiment analysis.

Cautions

Compared with its competitors, Hornbill struggles to penetrate and sell to large enterprise organizations on a consistent basis.

Supportworks ITSM Enterprise lacks native capabilities to reinforce desired behaviors and process adherence through visualization, although the vendor plans to address this gap in its next release.

Supportworks' process designer uses pop-up properties windows instead of more desirable drag-and-drop functionality. As a result, configuration is less intuitive and more time-consuming.

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HP

We evaluated HP Service Manager 9.31.

Strengths

HP Service Manager can be tightly integrated with HP's IT Asset Management, IT Service Catalog and Universal CMDB offerings to bolster the entire IT operations suite. Service Manager is fully integrated with HP Enterprise Collaboration, which enables collaborative operations management and advanced search capabilities to retrieve social artifacts.

The vendor's professional and technical services have significant worldwide capabilities across implementation, integration and consulting practices.

Cautions

HP does not offer Service Manager in the SaaS model. Enterprises in search of a SaaS solution can use HP Service Anywhere, but that product does not offer comparable functionality.

HP has lost focus on its marketing and branding efforts for Service Manager, leaving customers wary of the product's future.

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IBM

We evaluated IBM SmartCloud Control Desk (SCCD) v.7.5.

Strengths

SCCD v.7.5 enhances change impact analysis by providing an end-to-end view of IT services with a clear rendering of the relationship between both IT and non-IT components, such as mobile phone towers or power plants.

The autoticketing assignment feature assigns tickets to service desk team members using set criteria, such as workload balancing, skill base or round robin.

SCCD takes advantage of client management integration to deliver an enterprise app store for simplified, end-to-end software distribution.

Cautions

Without training, nontechnical IT personnel may find it challenging to navigate the user interface to complete tasks.

Customers report that it is difficult to integrate SCCD with non-IBM solutions.

SCCD has limited out-of-the-box mobile capabilities and requires significant administrative effort for optimization on a mobile device.

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LANDesk

We evaluated LANDesk Service Desk Suite 7.5.

Strengths

Enterprises can integrate Service Desk 7.5 with LANDesk's product portfolio (including MDM and client management) to enable automated configuration capabilities — a potential value-add for organizations that consolidate Level 1 and Level 2 support functions.

The product's Management Information Analytics function provides the ability to build metrics from key performance indicator (KPI) values and business-critical success factors, which can aid IT organizations in demonstrating the value of IT to the business.

Cautions

Service Desk's social capabilities are not as robust as its competitors and lack richness in collaborative functions.

Some LANDesk customers find the user interface difficult to navigate and challenging.

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ManageEngine

We evaluated the ServiceDesk Plus 8.1 release.

Strengths

ManageEngine provides a simple, easy-to-use solution that is available via download.

Customers report that the vendor is easy to work with and incorporates customer feedback into the product with quick release cycles.

Cautions

ManageEngine does not provide a visual view of ITSM processes, relying instead on customizable workflow templates.

ManageEngine ServiceDesk Plus lacks self-service data management/business intelligence capabilities, relying instead on out-of-the-box reports for decision support.

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Serena Software

We reviewed Orchestrated IT v.4.0.1.

Strengths

Serena Software effectively serves IT organizations that have strong application development and operations management collaborative capabilities, with respect to meeting the challenges of release management.

The vendor has demonstrated the ability to quickly enhance Orchestrated IT, providing quarterly releases since its launch.

Cautions

Serena Software has limited appeal outside of organizations with large portfolios of custom-built software, where change and release management are more critical needs.

The vendor has a smaller set of partners than its competitors.

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ServiceNow

We evaluated the Berlin release.

Strengths

An advanced high-availability architecture provides customers with stable, low-latency instances.

ServiceNow's rapidly expanding partner network helps organizations across the globe to implement the product quickly and consistently.

ServiceNow provides deep integration with Live Feed (social IT) and core service management applications to enable effective collaborative operations management.

Cautions

Organizations without in-house developers and capabilities may struggle to manage implementations and configurations, and may have to pay for third-party assistance.

Recent changes in ServiceNow's pricing model have caused some confusion among existing customers and prospects.

ServiceNow has only basic reporting and dashboard capabilities. Customers in search of business value-based reporting must purchase third-party solutions.

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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 appearing 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. This may be a reflection of a change in the market and, therefore, changed evaluation criteria, or a change of focus by a vendor.

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Added

Serena Software and ManageEngine were added to this Magic Quadrant.

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Dropped

No vendors were dropped from this Magic Quadrant.

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Inclusion and Exclusion Criteria

To be included in the 2013 Magic Quadrant for ITSSM tools, vendors must offer, at minimum, products that meet all the following criteria:

The ITSSM product must include all the following functionality:

- IT incident management
- IT problem management
- IT change management
- IT release governance
- IT user self-service
- IT request management
- IT knowledge management
- IT service support analytics and reporting
- IT SLA management (with regard to incident and service requests)

The ITSSM vendor must offer qualifying products licensed in both of the following methods:

- Software owned, managed and located by organization behind enterprise firewalls
- Software owned, delivered and managed remotely by one or more providers, and purchased on a pay-for-use basis or as a subscription

The product must be optimized for usage on a mobile device for the following purposes:

- Incident update and resolution
- Authorization approvals
- Access to reporting/metrics

The vendor must have at least \$10 million in annual revenue derived from ITSSM products.

The vendor must provide 10 qualifying customer references meeting the following criteria:

- The ITSSM solution must be paid for by the customer and used in a production environment.

- The customer must be concurrently using five of the following modules: incident management, problem management, change management, release governance, IT user self-service (for knowledge and request management), support analyst/technician collaboration, IT service support analytics and SLA reporting.

- The customer must be utilizing more than 100 concurrent licenses or 300 named licenses.

- References must include examples of both licensing models.

- References must be located in at least three of the following regions: North America, South America, Europe, the Middle East, Africa, Asia and Australia.

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Evaluation Criteria

Ability to Execute

Product/Service: Gartner evaluates the capabilities, quality, usability, integration and feature set of the solution, including the following functions:

- Service desk — incident management, problem management, request management
- Engineering/admin — change management, configuration management, release governance
- End user — self-service, request management
- Administrative — SLA management, reporting, inventory/configuration repository

Overall Viability (Business Unit, Financial, Strategy, and Organization): We consider the vendor's company size, market share and financial performance (such as revenue growth and profitability). Analysis reflects the vendor's capability to ensure the continued vitality of its ITSSM tool offering.

Sales Execution/Pricing: We evaluate the vendor's:

- Capability to provide global sales support that aligns with its marketing messages
- Presence in North America, Europe and the Asia/Pacific region (including Japan), and the rest of the world
- Flexibility in licensing models, pricing and packaging specific to solution portability

Market Responsiveness and Track 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, and how well the vendor receives customer feedback and quickly builds it 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 positive identification with the client management 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, whether they were glad they chose the vendor's product and whether they planned to continue working with the vendor.

Table 1. Ability to Execute Evaluation Criteria

| Criteria | Weight |
|------------------------------|-----------|
| Product or Service | High |
| Overall Viability | Medium |
| Sales Execution/Pricing | Medium |
| Market Responsiveness/Record | High |
| Marketing Execution | High |
| Customer Experience | High |
| Operations | No Rating |

Source: Gartner (August 2013)

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Completeness of Vision

Market Understanding: This criterion evaluates vendor capabilities against future market requirements. The market requirements map to the Market Overview discussion and look for the following functionality:

Fully functional mobile device interface, including incident update and resolution, authorization approvals, and access to reporting and metrics. Also included is utilization of location awareness of the mobile device, as well as the camera.

End-to-end visualization of hierarchical and peer-to-peer relationships of configuration items that deliver IT services.

Social capabilities that enable collaboration around a shared purpose.

Advanced reporting capabilities focused on business value beyond the traditional productivity measures. Advanced reporting includes:

Specific reports tied to common critical success factors and key performance indicators for an IT service desk

Use of multidimensional charts to show how related metrics impact each other

Dashboarding via a business value dashboard on the impact of critical success factors, whether financial or otherwise

Process governance and reinforcement capabilities to ensure that optimal desired behavior and business outcomes are delivered through the team utilizing the ITSSM tools.

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

Sales Strategy: We evaluate the vendor's approach to selling ITSSM tools to IT organizations and management service providers (MSPs). We also evaluate the vendor's ability to sell in the appropriate distribution channels, including:

Direct sales

Indirect sales

Offering (Product) Strategy: We evaluate product usability, ease of use of out-of-the-box best practices and workflow, and ease of integration with other management tools as they relate to their importance in meeting buyers' needs. We also evaluate the breadth of ITSSM tool offerings, and the depth of functionality within each module, specifically looking at the following features of the solutions:

Configuration of best-practice templates. This encompasses philosophies inclusive of the ValueOps perspective. This focuses on combining popular frameworks and methodologies (e.g., ITIL, DevOps and COBIT 5) to realize greatest value — ease of use (graphical user interface [GUI], upgrade, configuration and process modification)

Ease of integration with third-party IT operations management tools

Flexibility in licensing and delivery models (e.g., perpetual, subscription, named, concurrent, single tenant hosted, multitenant hosted)

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

Innovation: This criterion includes product leadership and the ability to deliver ITSSM tools 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 assess the vendor's strategy to penetrate emerging

markets. We also evaluate the vendor's strategy around the following potential markets:

- North America
- South America
- Europe
- The Middle East
- Asia (including Japan)
- Africa
- Australia
- Emerging markets (Brazil, Russia, India, China [BRIC])

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 | Low |
| Vertical/Industry Strategy | No Rating |
| Innovation | High |
| Geographic Strategy | High |

Source: Gartner (August 2013)

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Quadrant Descriptions

Leaders

Positioning in the Leaders quadrant is the result of success in the Completeness of Vision and Ability to Execute criteria. As was the case in 2012, no vendors met the criteria this year to be Leaders in this evolving ITSSM tools market.

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Challengers

Challengers are defined by keen capability in Ability to Execute criteria; however, they do not yet have the Completeness of Vision required to become Leaders in this market. Challengers have shown the ability to provide tools with the basic required feature sets, but have yet to break through to providing products that truly represent the future vision of the ITSSM tool market.

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Visionaries

There were no vendors in the Visionaries quadrant this year.

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Niche Players

Niche Players have strengths in particular areas of ITSSM, but have not invested in satisfying all of the requirements to demonstrate Completeness of Vision and Ability to Execute.

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Context

Although Gartner identified the ITSSM tool in 2012, a variety of ITSSM functions have been available as disjointed tools for decades. We are now seeing the functions come together in integrated products that address ITSSM functionality from the combined perspective of people, process and tooling. ITSSM tools are most suitable for I&O organizations with some degree of maturity. Gartner recommends them for I&O organizations to achieve an ITScore for Infrastructure and Operations (ITSIO) of Level 3 or better.

(Most organizations are still just above a Level 2, with little progress toward improving.¹) The majority of organizations are pushing to improve their maturity to a Level 3. I&O organizations must look with a broad perspective at how ITSSM tools, in conjunction with an overall improvement program, can help I&O achieve higher levels of maturity. This pursuit should ultimately position I&O to demonstrate measurable business value to end users.

Organizations should not base their choice on vendors with the closest proximity to the Leaders

quadrant. Instead, IT leaders should create a list of criteria that describes their needs, then select from vendors that best meet those requirements. Organizations should use a vendor that is focused on this market and can meet their needs for at least the next five years. Focus on skills, training, process and proper product implementation, because these factors will influence a product experience more than the specific functional capabilities. Additionally, organizations should select a vendor that can truly aid the I&O organization in reaching its maturation goals.

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Market Overview

ITSSM tool functionality extends beyond traditional IT service desk tools to address the changing dynamics of IT service support. The ITSSM tool market is still focused on IT service support, but with more emphasis on improving root cause isolation, and on providing higher levels of business user satisfaction. Using this business view, IT support organizations can manage incidents, problems and service requests throughout their life cycles at more efficient and effective rates.

IT organizations at higher maturity levels are in the process of deriving higher value from solutions that integrate functions across process modules (e.g., incident, problem and change management), if those processes are implemented and well-established. Because only a small percentage of organizations have reached ITSIO maturity Level 3, the adoption of ITSSM tools will be slow.

IT organizations that plan to reach Level 3, 4 or 5 ITSIO maturity in the next three years should replace IT service desk tools with ITSSM tools, if they have not already.

The three main functional groups of tools are:

IT help desk tools, which focus on the most basic of support tasks, such as trouble ticketing and simple logging of issues

IT service desk tools, which focus on service management principles, and are often aligned to basic processes found within the ITIL framework, such as incident management, problem management, change management, knowledge management and self-service.

ITSSM tools, which include the functionality within IT service desk tools, but extend to the additional common ITIL processes that are utilized by maturing organizations that wish to demonstrate the I&O organization's value. ITSSM tools are used beyond just the service desk function within the group.

The IT service desk function continues to grow and mature, resulting in the ITSSM tools market's emergence. Tool functionality has been built on top of existing toolsets over time (see "Introducing the IT Service Support Management Tools Market"). However, in the ITSSM tool market, product selection criteria are more focused on enabling the tool to evolve to keep pace with new technology and user demands. In addition to the usual IT service desk criteria, the ITSSM tools will focus on how the various features of tools integrate from the perspective of people, process and technology, with a specialized focus on:

Optimization for mobile device usage for incident update and resolution, authorization approvals, and access to reporting and metrics

End-to-end visualization of hierarchical and peer-to-peer relationships of configuration items that deliver IT services

Social IT management capabilities that enable improved collaboration, generate ideas and share best practices

An integrated suite in conjunction with a larger, integrated IT service management vision

Advanced analytics capabilities that IT service support organizations can leverage to correlate service support performance with business outcomes

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