# VENDOR SELECTION MATRIX™ ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

## The Top Global Vendors 2023

## March 2023

RESEARCH IN ACTION
independent research & consulting

# VENDOR SELECTION MATRIX™

## ENTERPRISE SERVICE MANAGEMENT SOLUTIONS
## THE TOP GLOBAL VENDORS 2023



STRATEGY LEADER

**Enterprise Service Management Solutions
The Top Global Vendors 2023**

MARKET LEADER

SERVICENOW
MICRO FOCUS

BMC SOFTWARE
FRESHWORKS

MATRIX42

TOPDESK

IVANTI

ATLASSIAN

BROADCOM

EASYVISTA

AISERA

SOLARWINDS

IFS

MICROSOFT

HORNBILL

IBM

SAP

MANAGEENGINE

ZENDESK

IET SOLUTIONS

STRATEGY

CHALLENGER

EXECUTION LEADER

EXECUTION

| | | STRATEGY | EXECUTION | TOTAL |
|---|---|---|---|---|
| 1. | SERVICENOW | 4.86 | 4.73 | 9.59 |
| 2. | MICRO FOCUS | 4.79 | 4.75 | 9.54 |
| 3. | BMC SOFTWARE | 4.54 | 4.68 | 9.21 |
| 4. | FRESHWORKS | 4.50 | 4.65 | 9.15 |
| 5. | MATRIX42 | 4.49 | 4.53 | 9.01 |
| 6. | TOPDESK | 4.54 | 4.46 | 9.00 |
| 7. | IVANTI | 4.43 | 4.56 | 8.99 |
| 8. | ATLASSIAN | 4.43 | 4.46 | 8.89 |
| 9. | BROADCOM | 4.28 | 4.54 | 8.81 |
| 10. | EASYVISTA | 4.31 | 4.35 | 8.66 |
| 11. | AISERA | 4.28 | 4.21 | 8.49 |
| 12. | SOLARWINDS | 4.20 | 4.21 | 8.41 |
| 13. | IFS | 4.06 | 4.29 | 8.35 |
| 14. | MICROSOFT | 3.91 | 4.25 | 8.16 |
| 15. | HORNBILL | 3.99 | 4.14 | 8.13 |
| 16. | IBM | 3.89 | 4.00 | 7.89 |
| 17. | SAP | 3.85 | 3.93 | 7.78 |
| 18. | MANAGEENGINE | 3.81 | 3.85 | 7.66 |
| 19. | IET SOLUTIONS | 3.70 | 3.93 | 7.63 |
| 20. | ZENDESK | 3.75 | 3.86 | 7.61 |

**Notes:**
- Scale Explanation: 1 (Low) To 5 (High).
- Potential numerical deviations due to rounding.

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# FOREWORD

Every year, Research In Action surveys 10,000+ enterprise IT and business decision makers in order to gain insights on strategy, investments and ongoing challenges of technology innovation in the IT and Marketing Automation realm. These surveys give us access to a wealth of direct and unfiltered feedback from the buyers. It also helps us to understand how buying decisions are made in today's business environment. The Vendor Selection Matrix™ is a primarily survey-based methodology for vendor evaluation, where 63% of the evaluation is based on a survey of enterprise IT or business decision makers and 37% on the analyst's judgement. The analyst's input is fed by a combination of intensive interviews with software or services vendors and their clients, plus their informed, independent point-of-view as an analyst. All of this combines to make Research in Action Vendor Selection Matrix™ reports so unique. This approach is one of the key differentiators of Research In Action in market research. For this report, we interviewed 1,500 enterprise IT and business managers with budget responsibility in enterprises globally. We selected those vendors which achieved the best evaluations scores from the buyers but disregarded those with fewer than 15 evaluations.

What has become increasingly clear over the past year is that an organization's ability to adapt and change, and its ability to deliver on a core mission, is highly dependent on, and vulnerable to, how automated, secure and optimized its workflows are. Yet for all ITs genius in automating existing IT Services and leveraging modern Enterprise Service Management (ESM) technologies and data, some IT teams have partnered with or enabled their business teams to automate their workflows toward the goal of becoming a digital organization. The desire for a digital business has accelerated a fundamental shift in the ownership of intelligent workflow automation and digitization in enterprises worldwide. The old certainties of automating processes and services only within IT and the adopting of the necessary technologies and solutions are no longer true. Now IT technologies, non-IT and changemakers challenge the need for workflow automation to be done for other services outside of IT, leaving some IT teams disorientated and at real risk of being left behind.

However, there is also evidence to suggest the opposite: Digital transformation is driving the need for ESM and dedicated ESM roles and journeys. The ESM journey is supported by many vendors offering workflow automation solutions. Our research shows that ESM is sticking with enterprises and the vendors in this space have adapted their solutions and offerings towards this fascinating and evolving ESM market.

This Vendor Selection Matrix™ report provides you with a useful guide to important ESM market trends and names the Top vendors. These details are intended to help you make an informed decision about which vendors might best meet your needs. Enjoy reading it and reach out if you have questions.

You only live once (YOLO)! **Eveline Oehrlich**
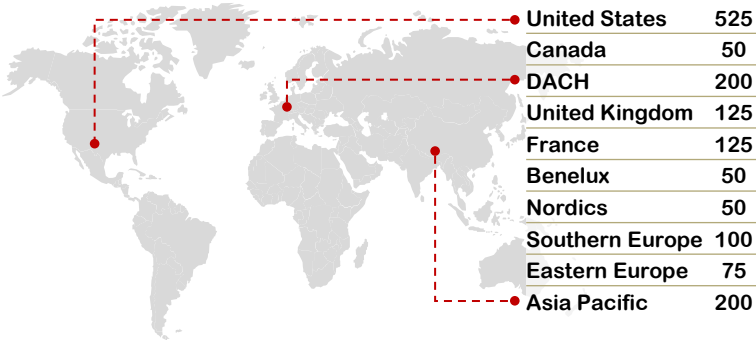
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# OUR SURVEY DEMOGRAPHICS: IT AUTOMATION IN GLOBAL ENTERPRISES

## Country Breakdown

| Country | |
|---|---|
| United States | 525 |
| Canada | 50 |
| DACH | 200 |
| United Kingdom | 125 |
| France | 125 |
| Benelux | 50 |
| Nordics | 50 |
| Southern Europe | 100 |
| Eastern Europe | 75 |
| Asia Pacific | 200 |

## Industry Breakdown

| Industry | |
|---|---|
| Energy | 90 |
| Financial Services | 260 |
| Government & Non-Profit | 70 |
| Life Sciences | 160 |
| Manufacturing | 400 |
| Technology, Media & Telecoms | 200 |
| Consumer Packaged Goods & Retail | 100 |
| Professional Services | 120 |
| Travel & Transportation | 100 |
| **Total** | **1,500** |

## Company Size Breakdown

(Enterprises with revenue > € 250 million p.a.)

| Headcount | Count |
|---|---|
| < 2,500 | 120 |
| 2,500 – 5,000 | 350 |
| 5,000 – 10,000 | 510 |
| 10,000 – 50,000 | 400 |
| > 50,000 | 120 |

Headcount

## Job Title Breakdown

| Job Title | | Job Title | |
|---|---|---|---|
| VP IT Infrastructure | 160 | Chief Operations Officer | 60 |
| IT Manager | 160 | VP Technology | 50 |
| VP IT | 125 | Sourcing And Vendor Management | 40 |
| Chief Information Officer | 120 | Business Executive | 30 |
| IT Operations Manager | 120 | VP IT Financial Management | 30 |
| VP Service Desk | 120 | VP Enterprise Architecture | 25 |
| Chief Technology Officer | 100 | Project Manager | 25 |
| Project Management Office | 80 | VP Application Development | 20 |
| Chief Digital Officer | 65 | VP DevOps | 20 |
| VP IT Shared Services | 65 | Chief Financial Officer | 15 |
| VP Operations | 60 | Chief Sales Officer | 10 |
| | | **Total** | **1,500** |

*All Research in Action surveys are gender neutral and 100% confidential.*

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**100,000+**
Data Points

**1,500**
Enterprise Managers

**37%**
Analyst's Opinion

**63%**
Survey Results

## The Vendor Selection Matrix™ Evaluation Methodology:

The basis of our competitive vendor evaluation reports is always an extensive buyer survey.
We then select those vendors which achieved the best evaluations scores from the buyers but disregard those with fewer than 15 evaluations.
The final matrix scores are a combination of the survey results, vendor input and analyst's opinion.

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# OUR MARKET IMPACT OVER 12 MONTHS

**Members In Our Survey Panel**

125,000 IT Automation
90,000 Marketing Automation

**30 Research Reports Published**

400+ vendors evaluated
14,000 views per report (average)

**10,000+ Active Enterprise Survey Participants**

all with budget responsibility

**25 Press Releases**

2,000 views per press release (average)

**Vendor Selection Matrix™: The right mix makes all the difference**
**63% customer evaluations + 37% analyst's judgement = 100% success**

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# WHAT IS ENTERPRISE SERVICE MANAGEMENT?

- Enterprise Service Management (ESM)[1] uses a variety of methods to improve the way individuals and teams throughout an organization develop, deliver, interact with, and consume applications and services across functional departments. The goal is to improve both employee productivity and effectiveness by automating many workflows.

- ESM has evolved from traditional IT Service Management (ITSM)[2]. While some organizations are leveraging practices developed from ITSM, others are automating while re-engineering tasks, processes and/or decisions without using ITSM.

- ESM solutions automate workflows, correlate and orchestrate data and manages assets, and leverage intelligence to analyze, manage and deliver applications and services. While some solutions focus primarily on the automating IT workflows (hence the name ITSM), other solutions automate business services in areas such as (1) human resources, (2) vendor management, (3) technical services, (4) field services, (5) financial management, (6) shared services organizations.

- An ESM solution should include, but is not limited to:
  - ➢ Centralize, integrate, optimize and enable the automation of enterprise services across an organization and its business functions for internal customers
  - ➢ Digitize the multitude of service processes through automation to achieve quality service experiences and continuous improvement
  - ➢ Standardize processes and workflows to optimize employee experience and their ability to serve external customers

[1] Enterprise Service Management, see https://en.wikipedia.org/wiki/Enterprise_service_management.
[2] IT Service Management, see https://en.wikipedia.org/wiki/IT_service_management.

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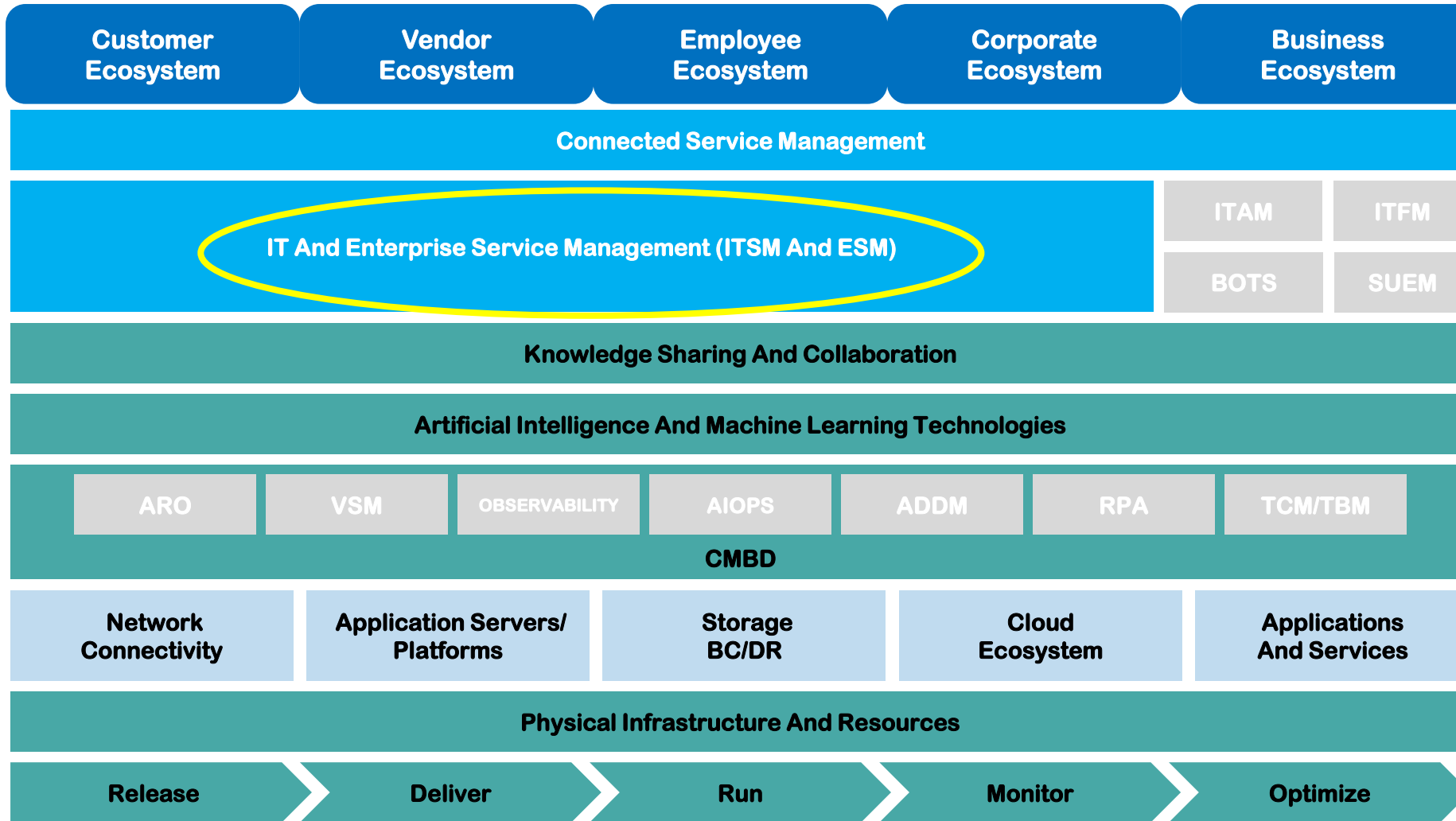# ADDITIONAL DEFINITIONS ESSENTIAL FOR ESM

- Employee Experience (EX) is the total experience an employee has with its employer throughout their journey or relationship. The start of the journey typically begins during the recruitment phase and continues through the various stages such as onboarding, learning and development, day-to-day work processes, tasks and decisions (independent but also related to business function), until the employee leaves the organization.

- Customer Experience (CX) is the total experience a customer has with an organization or institution and/or its functions and/or employees throughout the customer journey. The start of the journey varies depending on the type of engagement, channel, and topic.

- Connected Service Experience (CSX) is the experience an employee, customer, partner or other constituent has during a specific engagement with an organization or institution. It is typically shaped and dependent on the speed, quality and efficiency of integrations across tasks, processes and decisions demanded and provided.

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# THE IT AUTOMATION MARKETEXTURE

| Customer Ecosystem | Vendor Ecosystem | Employee Ecosystem | Corporate Ecosystem | Business Ecosystem |
|---|---|---|---|---|

**Connected Service Management**

**IT And Enterprise Service Management (ITSM And ESM)**

| ITAM | ITFM |
|---|---|
| BOTS | SUEM |

**Knowledge Sharing And Collaboration**

**Artificial Intelligence And Machine Learning Technologies**

| ARO | VSM | OBSERVABILITY | AIOPS | ADDM | RPA | TCM/TBM |
|---|---|---|---|---|---|---|

**CMBD**

| Network Connectivity | Application Servers/ Platforms | Storage BC/DR | Cloud Ecosystem | Applications And Services |
|---|---|---|---|---|

**Physical Infrastructure And Resources**

Release → Deliver → Run → Monitor → Optimize

IT Automation solutions are necessary for a modern digital operating model.

IT Automation solutions are foundational for any transformation to reduces toil and decrease manual errors.

IT Automation solutions can enforce good practices to optimize digital service quality and speed of service delivery.
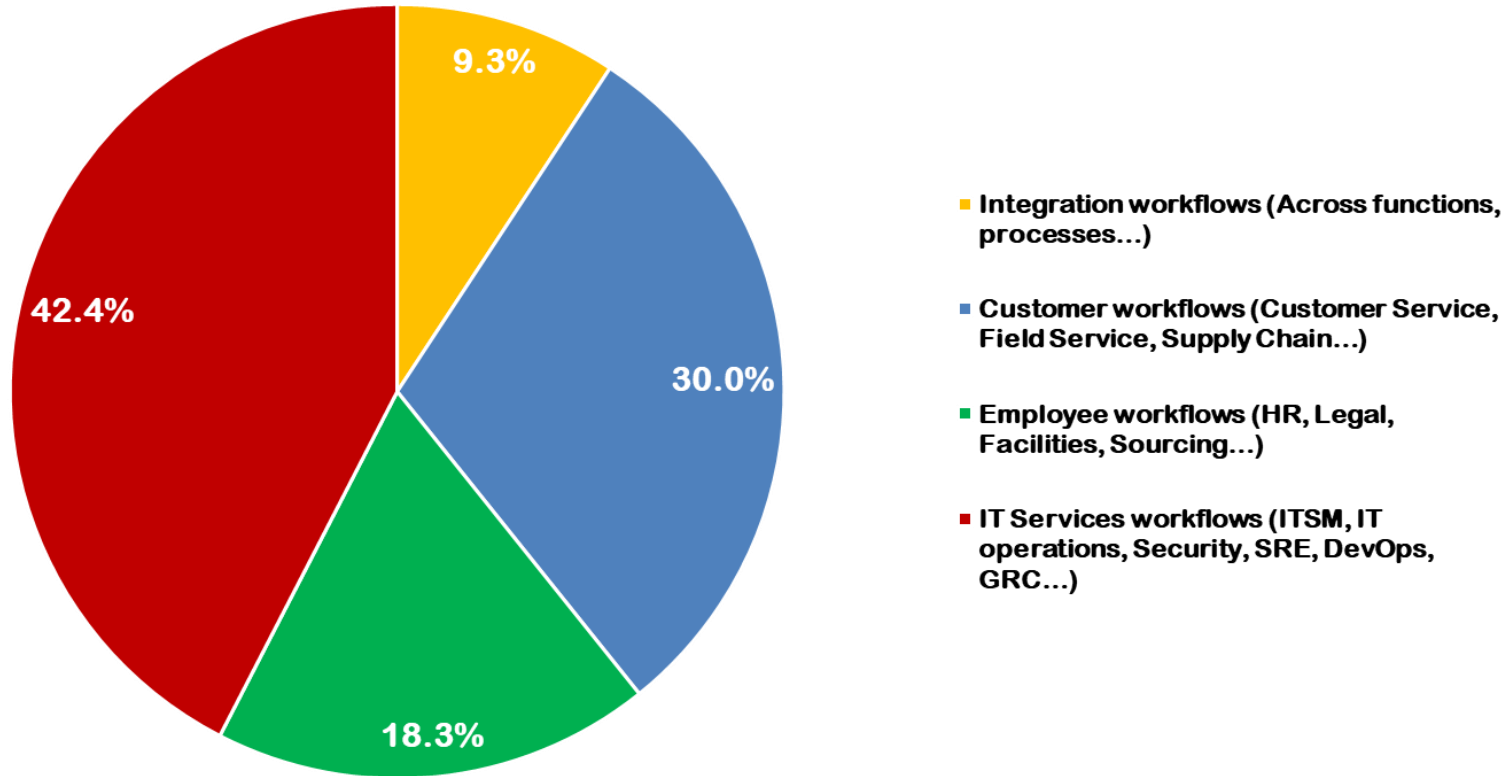
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# WELCOME TO THE CONNECTED SERVICE MANAGEMENT
## MATURITY S-CURVE 2023



Maturity Of Digital Service Management

**Chaotic**
4%* (7%)

**Reactive**
13% (16%)

**Stable**
43% (41%)

**Proactive**
26% (25%)

**Predictive**
14% (11%)

Help Desk
Asset Discovery
Basic SLAs
Basic ITIL
ITAM
Basic CMDB
Service Desk
Service Catalog
Advanced SLAs And Chargeback
Full CMDB AND ITIL
ITSM
Enterprise Portals
ITFM
SUEM
AIOps
Hybrid Cloud Management
TCM/TBM
RPA
ESM
CSM

*N = 3,000 Enterprise Managers with budget responsibility. * Categories show adoption rates in 2023, ( ) show 2020 values.*

Evolution Stage →

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# RESEARCH:

## THE GLOBAL ESM PRIORITIES FOR 2023:
### ENTERPRISES ARE AUTOMATING ACROSS ALL WORKFLOWS



**Pie chart:**
- 9.3%
- 30.0%
- 18.3%
- 42.4%

**Legend:**
- Integration workflows (Across functions, processes…)
- Customer workflows (Customer Service, Field Service, Supply Chain…)
- Employee workflows (HR, Legal, Facilities, Sourcing…)
- IT Services workflows (ITSM, IT operations, Security, SRE, DevOps, GRC…)

**Automating IT Services Workflows Are Still The Highest Priority (42%) For 2023, But…**

**30%** of global organizations are making the customer experience automation their second-highest priority.

**18%** of global organizations are improving employee workflows to enhance the employee experience and retain employees.

**9%** of global enterprises are recognizing the need to integrate workflows across IT, employees, and customers to create a holistic connected service experience for everyone.

**N = 1,500 Enterprise IT and Business Managers with budget responsibilities.**

**Question:**
**Which domain is your highest priority for the automation of workflows within the next 12 month?**

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# RESEARCH:

## THE GLOBAL ESM PRIORITIES COMPARISON:
DATA SUGGESTS A SHIFT IN PRIORITIES IN 2023 FROM EMPLOYEE WORKFLOWS TO CUSTOMER WORKFLOW AUTOMATION
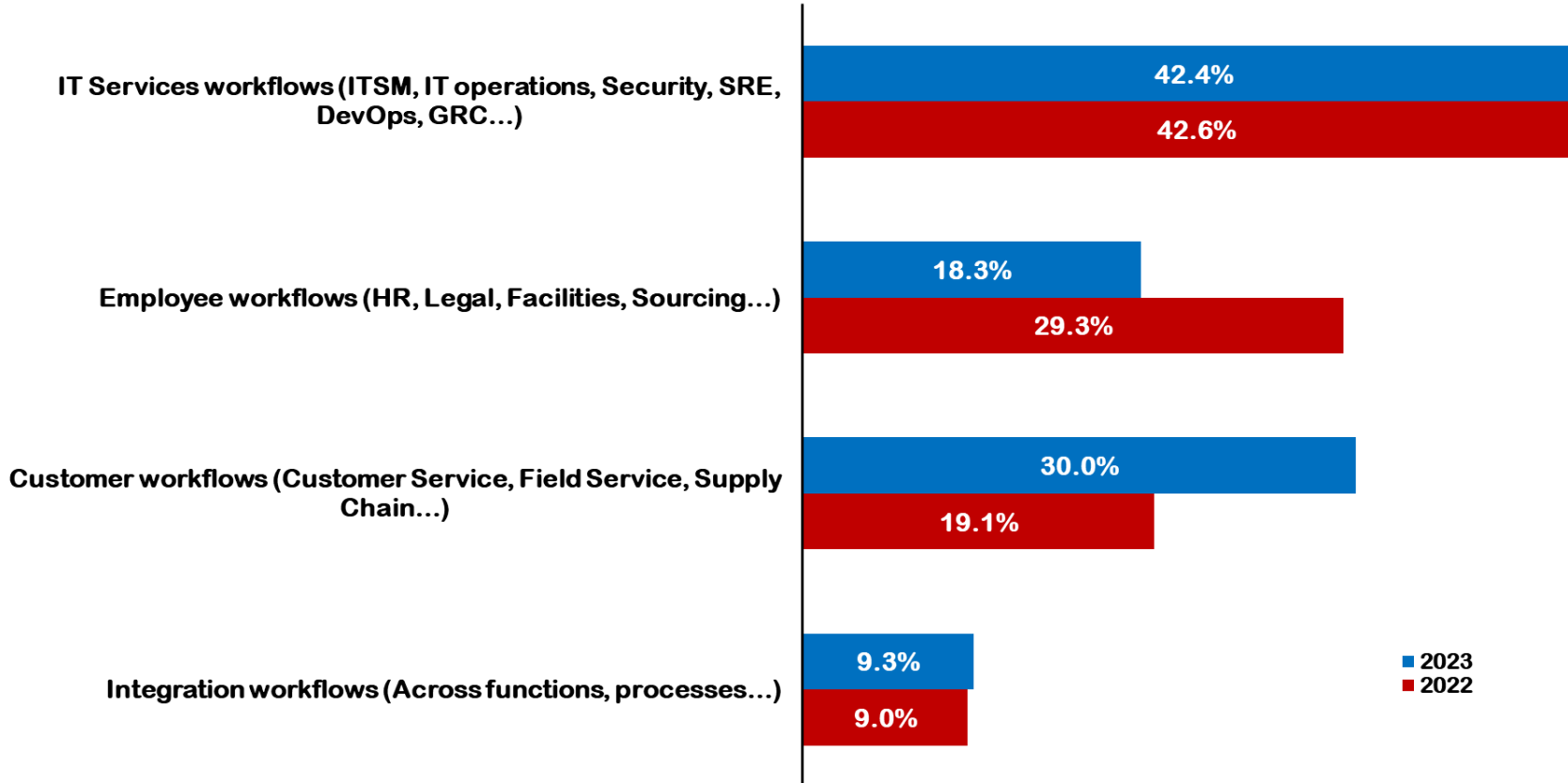


**IT Services workflows (ITSM, IT operations, Security, SRE, DevOps, GRC…)**
- 42.4%
- 42.6%

**Employee workflows (HR, Legal, Facilities, Sourcing…)**
- 18.3%
- 29.3%

**Customer workflows (Customer Service, Field Service, Supply Chain…)**
- 30.0%
- 19.1%

**Integration workflows (Across functions, processes…)**
- 9.3%
- 9.0%

■ 2023
■ 2022

N = 3,000 Enterprise IT and Business Managers with budget responsibilities.

Question:
Which domain is your highest priority for the automation of workflows within the next 12 month?

**Since 2022, Some Priorities Have Shifted While Some Have Stayed The Same.**

**Global enterprises place the same priority on automating IT Services workflows** and their plans to integrate workflows across functions and processes.

**There is a significantly higher priority** for global enterprises around their plans to automate customer workflows. Digital transformation agendas are driving the priority for automating customer workflows.

**There is a lower priority** for global enterprises to automate employee workflows. It is likely that many organizations have already automated many employee workflows during the pandemic years.

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# RESEARCH:

## REGIONAL ESM PRIORITIES 2023:
### PRIORITIES VARY GREATLY BY REGION
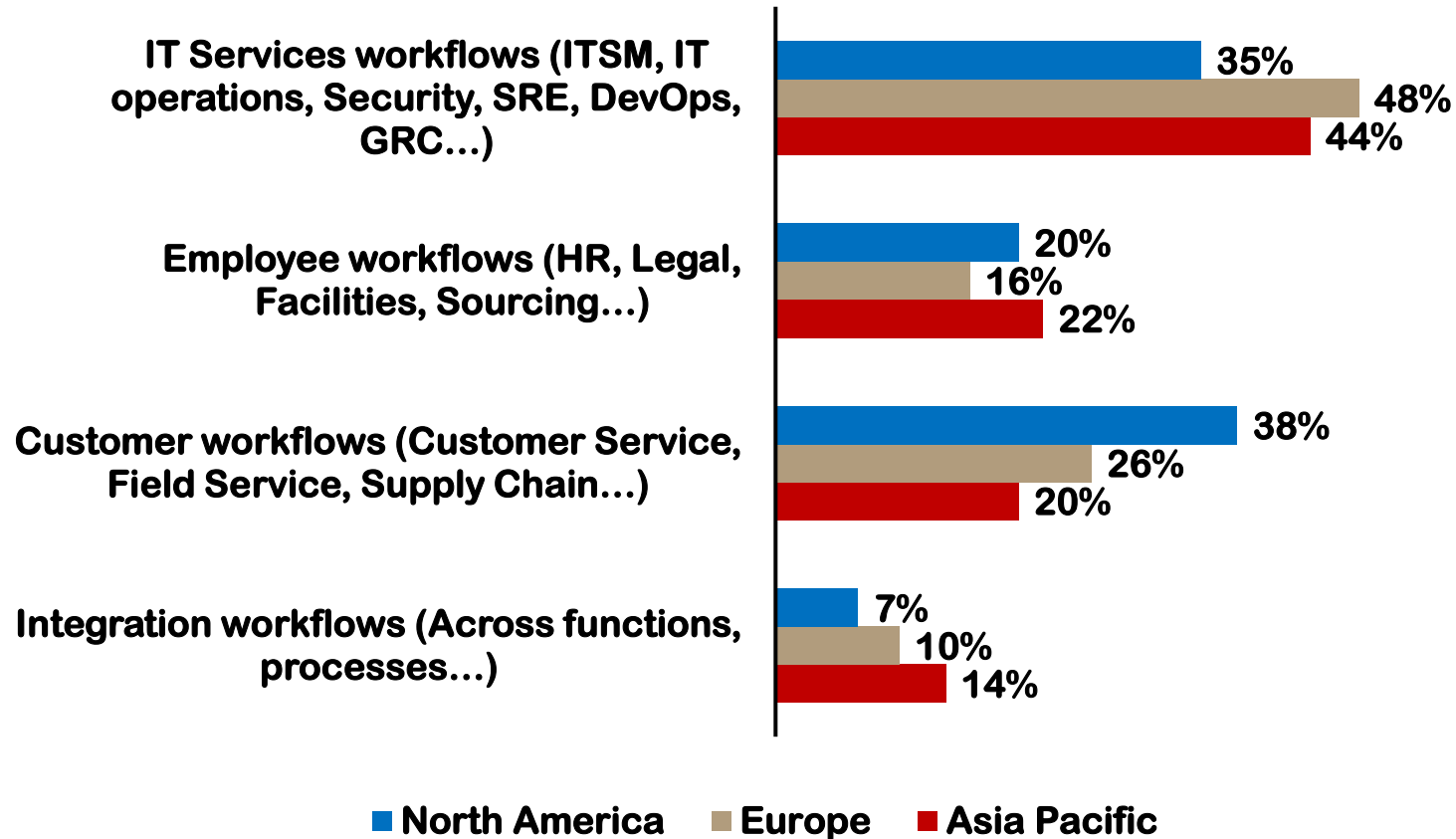
**IT Services workflows (ITSM, IT operations, Security, SRE, DevOps, GRC…)**
- North America: 35%
- Europe: 48%
- Asia Pacific: 44%

**Employee workflows (HR, Legal, Facilities, Sourcing…)**
- North America: 20%
- Europe: 16%
- Asia Pacific: 22%

**Customer workflows (Customer Service, Field Service, Supply Chain…)**
- North America: 38%
- Europe: 26%
- Asia Pacific: 20%

**Integration workflows (Across functions, processes…)**
- North America: 7%
- Europe: 10%
- Asia Pacific: 14%

Legend: ■ North America ■ Europe ■ Asia Pacific

**N = 1,500 Enterprise IT and Business Managers with budget responsibilities.**

**Question:**
**Which domain is your highest priority for the automation of workflows within the next 12 month?**

**Workflow Automation Differs Across Key Regions Of The World.**

**The highest automation priority (44%) for Asia Pacific** enterprises is in IT Services workflows, followed by employee workflows (22%) and customer workflows (20%).

**Meanwhile, European** enterprises are prioritizing their IT Services workflows (48%), followed by customer workflows (26%) and then employee workflows (16%) in 2023.

**And North American** organizations are prioritizing their customer workflows (38%), while IT Services workflows (35%) is a competing priority. The employee workflow automation (20%) is less important, and integration work across functions and processes is a low fourth priority (7%).

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# RESEARCH:

## THE GLOBAL MATURITY STATE OF ESM 2023:
### ALL THE WORK IN THE PAST HAS RESULTED IN IT SERVICES WORKFLOWS BEING THE MOST MATURE
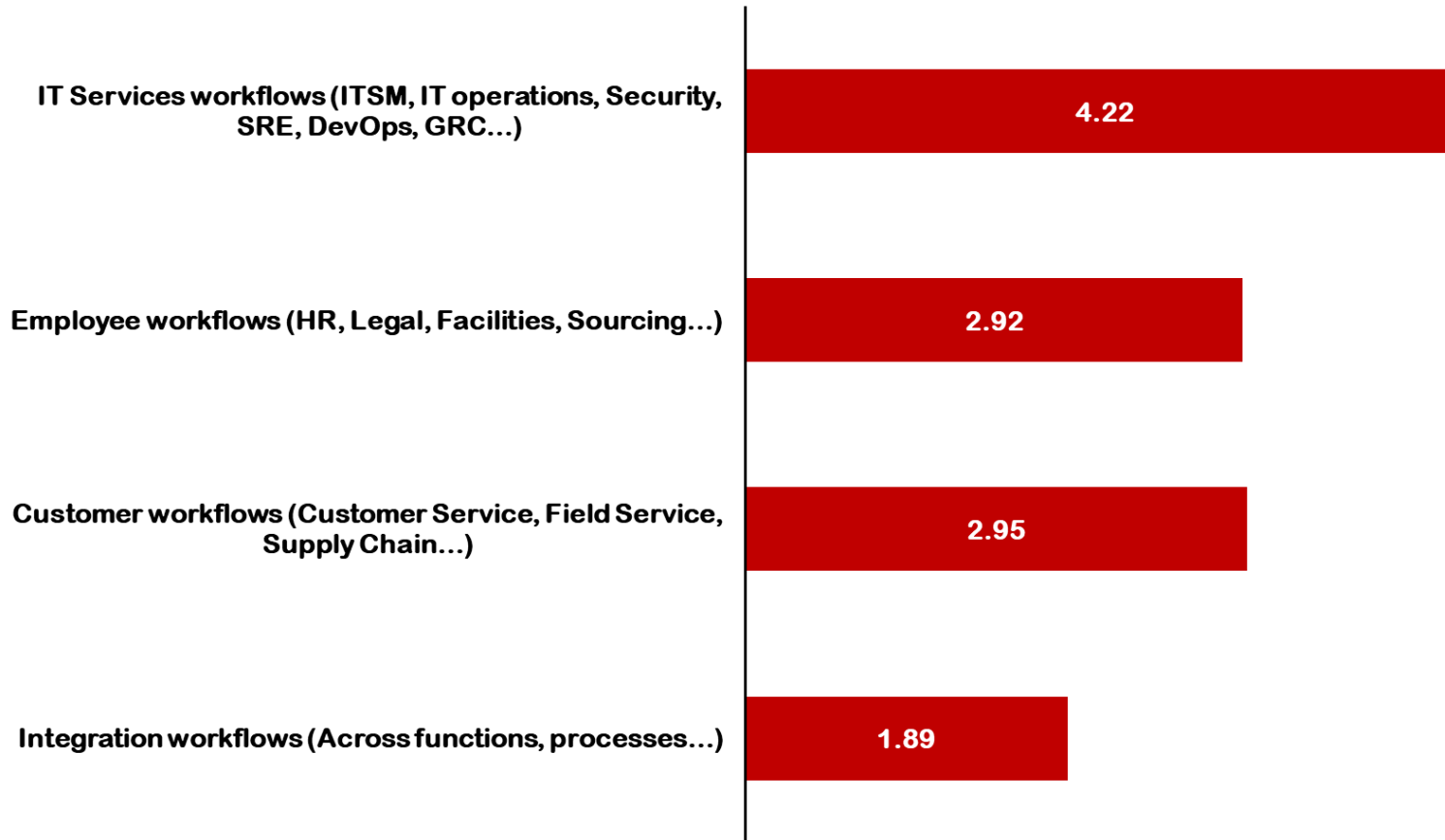
| Workflow | Maturity |
|---|---|
| IT Services workflows (ITSM, IT operations, Security, SRE, DevOps, GRC…) | 4.22 |
| Employee workflows (HR, Legal, Facilities, Sourcing…) | 2.92 |
| Customer workflows (Customer Service, Field Service, Supply Chain…) | 2.95 |
| Integration workflows (Across functions, processes…) | 1.89 |

**N = 1,500 Enterprise IT and Business Managers with budget responsibilities.**

**Question:**
**At what level of automation would you say are you within these domains?**

**IT Services Workflows Are The Most Mature Across The Global Enterprises Today.**

This is not surprising, as almost all organizations today have invested in some type of ITSM solution to automate IT workflows.

**Maturity Scale:**

1 - Just started

2 - At about 25%

3 - At about 50%

4 - At about 75%

5 - More than 75% automated

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# RESEARCH:

## THE GLOBAL MATURITY STATE OF ESM:
### BUT SINCE 2022, PROGRESS HAS BEEN MADEACROSS ALL WORKFLOWS
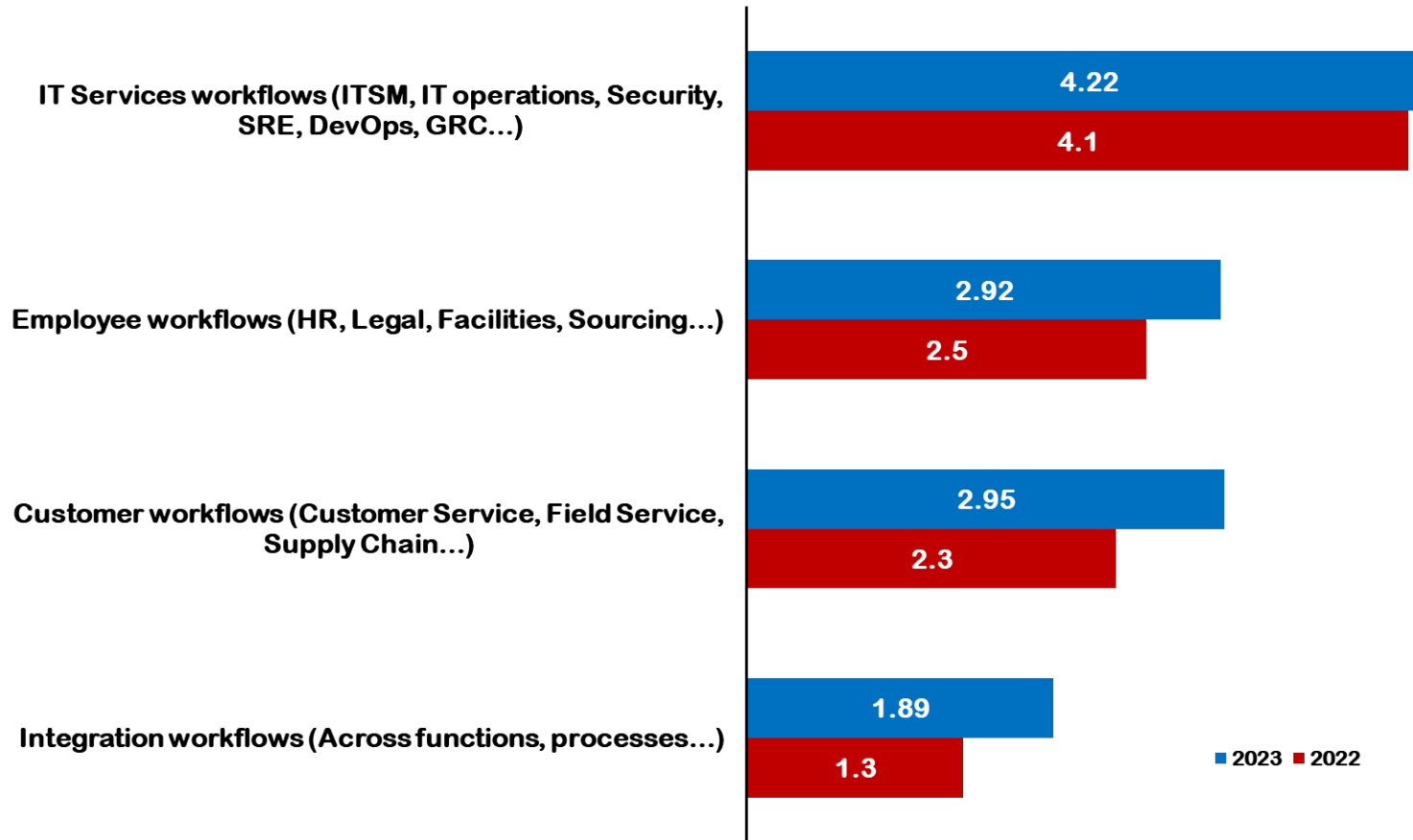
**IT Services workflows (ITSM, IT operations, Security, SRE, DevOps, GRC…)**
- 2023: 4.22
- 2022: 4.1

**Employee workflows (HR, Legal, Facilities, Sourcing…)**
- 2023: 2.92
- 2022: 2.5

**Customer workflows (Customer Service, Field Service, Supply Chain…)**
- 2023: 2.95
- 2022: 2.3

**Integration workflows (Across functions, processes…)**
- 2023: 1.89
- 2022: 1.3

■ 2023 ■ 2022

**Progress Was Made In All Workflows, With The Greatest Progress In The Customer Experience Workflows.**

**Maturity Scale:**

1 - Just started

2 - At about 25%

3 - At about 50%

4 - At about 75%

5 - More than 75% automated

N = 3,000 Enterprise IT and Business Managers with budget responsibilities.

Question:
At what level of automation would you say are you within these domains?

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# WHAT THE DATA MEANS:
## ITSM IS STILL THE TOP AUTOMATION PRIORITY, BUT ORGANIZATIONS ARE STARTING TO SEE THE BENEFITS OF ESM

**Global maturity across IT, employee and customer workflow automation looks good.**

The focus on automating IT Services workflows has led to a continuous improvement around the maturity of IT Services and today we see a high level of maturity. The adoption of ITIL4 and the ongoing desire to optimize IT Services continues this automation journey.

**IT Services workflow automation will continue to stay on the agenda of global enterprises.**

The constant demand for improved service levels and standards, the pressure to reduce costs while improving the efficiency of how IT Services are delivered and consumed drives the adoption of virtual agents, proactive knowledge sharing, and service feedback loops to name just a few. These new capabilities keep the automation work in IT Services on the agenda.

**Increased demands for collaboration drives more opportunities for ESM.**

The desire to integrate IT Services into the general business structures to improve employee productivity has gained significant traction due to the current acceleration of digital transformation projects for enterprises. This requires increased collaboration between IT and the business and has offered opportunities for these teams to work together on more than just IT Services.

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# WHAT THE DATA MEANS:
## ITSM IS STILL THE TOP AUTOMATION PRIORITY, BUT ORGANIZATIONS ARE STARTING TO SEE THE BENEFITS OF ESM

**An enabled and empowered employee might help to improve customer experiences**

While increased customer satisfaction through consistent service delivery is a key business priority, the enabled and empowered employee plays a significant role, accelerating both customer and employee workflow automation.

**The pandemic has accelerated some workflow automation to the better.**

The pandemic has forced many organizations to automate employee workflows as it was critical to keep employees enabled in their home office while ensuring the availability, resilience and security of applications and services.

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# INSIGHTS: TOP MARKET TRENDS 2023 PEOPLE

**Automation is driving humanization of work.**

According to the <u>Gallup's 2022 State of global Workforce,</u> only 21% of today's employees today are engaged. While there are a variety of reasons for this, a key cause of low employee engagement is a lack of involvement in meaningful and creative work. This is where workflow automation can have a significant impact on employee engagement. Automating workflows with technology to perform repetitive tasks frees people to focus on what is meaningful and creative work. ESM platforms and solutions that automate routine tasks for e.g., HR professionals, can significantly improve their engagement levels.

**Work is becoming more flexible, but employees need to be empowered through automated workflows.**

Remote working has become much more common since the pandemic. This allows companies to hire employees from any geographic location and allows employees to work from their cities and countries. One benefit of the coronavirus has been more and more employees see working from home as a great benefit. In a <u>recent study</u>, the Pew Research Center found that work can be done from home (54% say so), and given the choice, they'd like to work from home all or most of the time. A <u>Deloitte survey shows that 80%</u> of companies allow some form of remote and hybrid work.

**A digital mindset can create opportunities and ideas for innovation. IT is a key enabler.**

Mindset is a way of thinking (as described by many psychologists) that shapes how people perceive, feel, and act. A digital mindset is a combination of attitudes and behaviors that enable employees to see how the adoption of digital can provide opportunities by leveraging technologies such as Artificial Intelligence (AI), bots, algorithms, and augmented and virtual realities (AR/VR) to change the business landscape. IT departments need to support and enable a digital mindset by sharing what they can do today for teams or across the enterprise.

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# INSIGHTS: TOP MARKET TRENDS 2023 PROCESS

**Workflow automation is different from process automation, but it is attractive to all executives.**

Most importantly, do not confuse workflow automation with process automation. There is a big difference. Typically, a workflow consists of individual processes and is therefore more comprehensive than a process. For example, collecting the information needed for an employee contract involves a number of steps, such as drafting the contract, and getting it signed and a few steps in-between. Simply creating an employee contract would be considered process automation. Automating the end-to-end workflow of collecting information from the employee, generating the contract, distributing it for signing, and securely storing it is workflow automation.

**Workflow automation will deliver benefits, but it depends on what companies want to automate.**

While the benefits of workflow automation depend on what you're automating, the top benefits are time savings by replacing manual tasks, increased capacity to handle higher workloads, reduced effort and errors, improved employee satisfaction by focusing on more meaningful and creative work, improved collaboration by designing interactions, improved workflow agility by modifying workflows to support policies and regulations, and improved visibility into data and process details to enable continuous improvement across value streams and better decision-making by analyzing data in context.

**Burnout and unhappiness at an all-time high, will drive the focus on value creation and increased adoption of intelligent automation.**

According to a recent McKinsey study, burnout has reached an ultimate high in 2022. Reasons range from lack of compensation, lack of career development, uncaring leaders, unsustainable performance expectations, lack of meaningful work and lack of support for health and well-being are just a few at the top of the list. Creating value while reducing mundane or non-value work must be part of any internal or external strategy. Technology and automations (e.g., contextual AI, robotics, distributed infrastructure, connectivity, next-generation computing and smart integrated automation) can lead to growth and sustainability.

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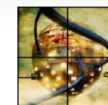
# INSIGHTS: TOP MARKET TRENDS 2023 TECHNOLOGY

**SaaS growth will continue, driven by security and reliability requirements, but consolidation at the vendor level may occur.**

The rise of Cloud technology in recent years has made it possible to move entire business operations off-site through the use of SaaS. We predict that SaaS will grow around 15% to 20% in 2023, with continuing significant growth though 2026. Despite the existing SaaS myth of the past, SaaS tools offer many benefits such as robust security, scalability, easy update capabilities, accessibility from anywhere, adaptable to support change, improved collaboration and finally flexible payment models. While there have been very few acquisitions across the ESM and ITSM space in 2022, there may be a significant number to come in 2023.

**Advanced capabilities and architectures are a must for competitive advantage.**

The capabilities and architectures to automate back-office workflows will not excite those who want to automate the customer and employee experience on the front-end. Capabilities such as personalization, AI, intelligent chatbots, virtual agents and integration with modern collaboration (e.g., Metaverse) are essential. While data quality has always been a challenge, in 2023, rapid decision making will require AI capabilities. Finally, security and observability capabilities, are of high importance to IT operations and should therefore be on the capability list to improve the reliability and availability of everything to everyone.

**Solutions must include four key capabilities and your ability to measure improvements are essential to prove benefits.**

While significant progress has been made in automating IT workflows, the next steps in customer and employee workflow automation must be driven by the following critical success factors before selecting your workflow automation solution: (1) It must integrate with your existing systems and infrastructure without a heroic act, (2) It must connect workflows and processes across functional departments, (3) It must also allow for changes to the workflow and (4) It must scale up to support the growth within the function or business. In addition, you need to measure the benefits across all to show improvements.

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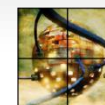
# INSIGHTS: TOP MARKET TRENDS 2023 LEADERSHIP AND BUDGET

**Digital transformation progress requires the partnering at C-level.**

Investments into people, process, and technology have changed somewhat in the past year Economic instability, inflation, skills gaps, environmental threats and war are accelerating some of the existing C-levels to merge their functions to have more combined power to respond and drive strategy. These same challenges and the lack of progress in digital transformation have given rise to the role of the Chief Digital Officer (CDO), who drives the digital transformation from a business and technical perspective. Some CIOs have moved into the CDO role. Regardless of the title, the fact is that the C-levels must work together to make progress on the digital transformation agenda.

**Global budgets in 2023 are set for software and services, but spending must be focused on value creation.**

Looking at predictions for 2023 from various market research firms, the bottom line is that more than 50% of global IT decision makers expect to increase their AI, machine learning, Cloud services systems or providers, while about 30% expect to consolidate existing infrastructure and data centers. While most IT technology decisions still reside within IT, some of that power is diffusing slightly as operations teams and other business leaders look for differentiators that leverage technology. But IT decisions are still predominantly made by IT with one caveat which is investments must add value to the overall business strategy.

**Business and IT are aligning, often through a digital transformation strategy.**

Digital transformation requires both IT and the business. IT teams are now at the forefront of strategy formulation, leading or driving business initiatives by creating new opportunities, new markets, and value creation through innovative technology, its talent pool, and the adoption of modern operating models. Particularly during the pandemic, the demand for IT skills and competencies has increased, and its ability to deliver and enable has changed the role and reputation of IT. In fact, IT has enabled organizations to do things they could not do before, enabling superior new capabilities.
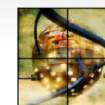
**RESEARCH IN ACTION**
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# VENDOR SELECTION MATRIX™

## ENTERPRISE SERVICE MANAGEMENT SOLUTIONS
## THE TOP GLOBAL VENDORS 2023

**These are the Top 20 vendors as selected by 1,500 users from buyer companies based upon product, company and service quality.**

| VENDOR NAME | SOLUTION |
|---|---|
| AISERA | Aisera AI Service Management |
| ATLASSIAN | Jira Service Management |
| BMC SOFTWARE | BMC Helix Service Management |
| BROADCOM | CA Service Management |
| EASYVISTA | EasyVista Service Management |
| FRESHWORKS | Freshservice and Freshservice for Business Teams |
| HORNBILL | Hornbill Service Manager, Hornbill Platform |
| IBM | IBM Maximo, IBM Control Desk |
| IET SOLUTIONS | iET IT Service Service Management Platform |
| IFS | IFS assyst |
| IVANTI | Ivanti Enterprise Service Management Platform |
| MANAGEENGINE | ManageEngine ServiceDesk Plus |
| MATRIX42 | Matrix42 Enterprise Service Management |
| MICRO FOCUS | Micro Focus Service Management Automation X (SMAX) |
| MICROSOFT | System Center Service Manager, Power Automate, Dynamics 365 |
| SAP | SAP Solution Manager, SAP S/4HANA |
| SERVICENOW | ServiceNow IT Service Management with optional Employee, Customer and Creator Workflows |
| SOLARWINDS | Solarwinds Service Desk |
| TOPDESK | TOPdesk Enterprise Service Management |
| ZENDESK | Zendesk for work, Zendesk for service |

**NOTE:** If a vendor does not respond, Research in Action will complete its scoring assessment based on analyst experience and desk research. The vendor's products and quick facts will be documented in the report, though a full vendor scorecard will not be written.

This list is alphabetical and includes all relevant Enterprise Service Management solution vendors named by the survey respondents.

For this report we interviewed 1,500 enterprise IT and business managers with budget responsibility in enterprises globally. We selected those vendors which achieved the best evaluations scores from the buyers but disregarded those with fewer than 15 evaluations.

Additional vendors that were cited but did not list in the Top 20, or had less than 15 ratings:

- ASG
- EFECTE
- MPHASIS
- OMNINET
- SERVICEWARE
- USU
- VISION HELPDESK

In January 2023, OPENTEXT completed the acquisition of MICRO FOCUS.

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# VENDOR SELECTION MATRIX™
## ENTERPRISE SERVICE MANAGEMENT SOLUTIONS
## THE TOP GLOBAL VENDORS 2023

### Vendor Quick Facts

| VENDOR NAME | MARKET PRESENCE | GROWTH RATE | CUSTOMER TRACTION | GOOD TO KNOW |
|---|---|---|---|---|
| AISERA | Small | High | Good | Offers a predictive Service Management solution leveraging lots of AI. |
| ATLASSIAN | Medium | High | Strong | Provides fluent Service Management for high performing product and service delivery. |
| BMC SOFTWARE | Big | High | Strong | Delivers intelligent, interconnected service experiences across employees, customers, developers, and technology partners. |
| BROADCOM | Big | Low | Good | Enables IT and other business functions with data driven decisions and actions. |
| EASYVISTA | Small | Medium | Good | Offers a cost-effective service automation solution. |
| FRESHWORKS | Medium | Very High | Strong | Helps organizations modernize IT and unify service delivery across business teams. |
| HORNBILL | Small | Medium | Good | Offers ESM and ITSM solutons for a unified service experience. |
| IBM | Medium | Medium | Medium | Manages different types of service, classes of assets and resources, in a single environment. |
| IET SOLUTIONS | Medium | Low | Medium | Offers out-of-the-box ITSM which are configurable and scaleable. |
| IFS | Medium | Low | Good | Offers a broad set of specific service automations. |
| IVANTI | Medium | High | Good | Offers automation and intelligence for IT and other business functions. |
| MANAGEENGINE | Medium | Medium | Medium | Simpifies IT Service Management for enterprises and MSPs. |
| MATRIX42 | Medium | High | Strong | Delivers solid and secure digital service experiences. |
| MICRO FOCUS | Big | Medium | Strong | Enables intelligent automation with its AI driven platform. |
| MICROSOFT | Medium | Medium | Good | Continues to bundle Service Management with its solutions. |
| SAP | Medium | Medium | Medium | Offers ITSM, customer and field Service Management. |
| SERVICENOW | Very Big | Very High | Strong | Continues to accelerate enterprise-wide digital transformation leveraging its low code platform. |
| SOLARWINDS | Medium | High | Good | Fast-tracks the collaboration between service development and service delivery. |
| TOPDESK | Medium | Very High | Good | Continues to delight its customers across key industry verticals. |
| ZENDESK | Medium | Medium | Low | Offers service automation across business and IT. |

| MARKET PRESENCE | GROWTH RATE | CUSTOMER TRACTION |
|---|---|---|
| Very Big | Very High | Strong |
| Big | High | Good |
| Medium | Medium | Medium |
| Small | Low | Low |

**NOTES:**
- Market Presence combines the market share and perceived Mindshare (or Share of Mind).
- Growth Rate is the anticipated growth rate for this year where Medium is the average growth for this market.
- Customer Traction combines the vendor's customer retention rate and the Research In Action Recommendation Index (RI). The RI is collected and calculated by asking the survey participants: "Would you recommend this vendor in this market to your peers - Yes or No?".

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# VENDOR SELECTION MATRIX™

## EVALUATION CRITERIA

### STRATEGY

| | | | |
|---|---|---|---|
| ✔ | **Vision And Go-To-Market** | **30%** | › Does the company have a coherent vision in line with the most probable future market scenarios?<br>› Does the go-to-market and sales strategy fit the target market and customers? |
| ✔ | **Innovation And Differentiation** | **30%** | › How innovative is the company in this market?<br>› Does the solution have a unique selling proposition and clear market differentiators? |
| ✔ | **Viability And Execution Capabilities** | **15%** | › How likely is the long-term survival of the company in this market?<br>› Does the company have the necessary resources to execute the strategy? |
| ✔ | **Recommendation Index** | **25%** | › Would customers recommend this vendor in this market to their peers? |

### EXECUTION

| | | | |
|---|---|---|---|
| ✔ | **Breadth And Depth Of Solution Offering** | **30%** | › Does the solution cover all necessary capabilities expected by customers? |
| ✔ | **Market Share And Growth** | **15%** | › How big is the company's market share and is it growing above the market rate? |
| ✔ | **Customer Satisfaction** | **25%** | › How satisfied are customers with the solution and the vendor today? |
| ✔ | **Price Versus Value Ratio** | **30%** | › How do customers rate the relationship between the price and perceived value of the solution? |

**NOTES:**
- 63% of the evaluation is based on the survey results, 37% is based on the analysts' assessment.
- 40% of the evaluation is based on the survey results: (1) Recommendation Index, (2) Customer Satisfaction, (3) Price Versus Value.
- 15% of the evaluation is based on the analysts' assessment: (1) Viability And Execution Capabilities, (2) Market Share And Growth.
- 45% of the evaluation is based on a combination of survey results and analysts' assessment: (1) Vision And Go-To-Market (2) Innovation And Differentiation (3) Breadth And Depth Of Solution Offering.

The Research In Action Recommendation Index (RI) is collected and calculated by asking the survey participants: "Would you recommend this vendor in this market to your peers - Yes or No?".

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# VENDOR SELECTION MATRIX™
## ENTERPRISE SERVICE MANAGEMENT SOLUTIONS
## THE TOP GLOBAL VENDORS 2023



|  |  | STRATEGY | EXECUTION | TOTAL |
|---|---|---|---|---|
| 1. | SERVICENOW | 4.86 | 4.73 | 9.59 |
| 2. | MICRO FOCUS | 4.79 | 4.75 | 9.54 |
| 3. | BMC SOFTWARE | 4.54 | 4.68 | 9.21 |
| 4. | FRESHWORKS | 4.50 | 4.65 | 9.15 |
| 5. | MATRIX42 | 4.49 | 4.53 | 9.01 |
| 6. | TOPDESK | 4.54 | 4.46 | 9.00 |
| 7. | IVANTI | 4.43 | 4.56 | 8.99 |
| 8. | ATLASSIAN | 4.43 | 4.46 | 8.89 |
| 9. | BROADCOM | 4.28 | 4.54 | 8.81 |
| 10. | EASYVISTA | 4.31 | 4.35 | 8.66 |
| 11. | AISERA | 4.28 | 4.21 | 8.49 |
| 12. | SOLARWINDS | 4.20 | 4.21 | 8.41 |
| 13. | IFS | 4.06 | 4.29 | 8.35 |
| 14. | MICROSOFT | 3.91 | 4.25 | 8.16 |
| 15. | HORNBILL | 3.99 | 4.14 | 8.13 |
| 16. | IBM | 3.89 | 4.00 | 7.89 |
| 17. | SAP | 3.85 | 3.93 | 7.78 |
| 18. | MANAGEENGINE | 3.81 | 3.85 | 7.66 |
| 19. | IET SOLUTIONS | 3.70 | 3.93 | 7.63 |
| 20. | ZENDESK | 3.75 | 3.86 | 7.61 |

**Notes:**
- Scale Explanation: 1 (Low) To 5 (High).
- Potential numerical deviations due to rounding.

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# VENDOR SELECTION MATRIX™
## ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

**Aisera is a market leader for global Enterprise Service Management Solutions and offers a predictive Service Management solution leveraging lots of AI.**

### GENERAL

Aisera is a software company with headquarters in Palo Alto, California. The company was founded in 2017 and has around 90 employees and provides AI-driven service management solution that automate operations and support for IT, human resources, sales, and customer service. It specializes in artificial intelligence, NLP, and NLU and its innovations are funded by a variety of investors. A recent funding round has raised its total funding to over $ 165 million.

### BOTTOM LINE

Aisera provides a different way of support work which it calls AI-driven support ticketing by leveraging AI. The platform plugs into existing system of record, including other help desk portals and responds to incoming inquiries and requests. Aisera's platform learns to resolve issues through a combination of language-analyzing AI and robotic process automation (RPA). The company does not see itself as a competitor to already existing ITSM or ESM solutions but rather as an add-on.

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# VENDOR SELECTION MATRIX™
## ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

Aisera is a market leader for global Enterprise Service Management Solutions and offers a predictive Service Management solution leveraging lots of AI.

## STRATEGY

The company's strategy is to continually expand its presence in the Artificial Intelligence Service Experience (AISX) space with its capabilities and platform. Aisera uses machine learning and natural language processing to solve problems in customer service, IT, sales, and operations problems. Its use of conversation AI and conversational automation capabilities provides a single, saleable and multilingual interface for IT and other business functions such as HR, sales and customer support to intelligently automate repetitive tasks, workflows and processes. Aisera has achieved the second highest score in our Recommendation Index.

## EXECUTION

Aisera has seen impressive growth in 2022, claiming to have over 75 million users using its AI and automation platform. In August of 2022, the company secured $90 million in Series D funding led by the growth equity business within Goldman Sachs Asset Management (Goldman Sachs) and Thoma Bravo. The additional funding will further strengthen Aisera's position as the leading Artificial Intelligence Service Experience (AISX) platform, while accelerating its market expansion across industry verticals and its global growth and go-to-market strategy. Survey respondents gave Aisera the second highest score for price versus value ratio.

| STRATEGY | RESULT |
|---|---|
| Vision And Go-To-Market | 4.50 |
| Innovation And Differentiation | 4.50 |
| Viability And Execution Capabilities | 3.00 |
| Recommendation Index | 4.50 |
| | 4.28 |

| EXECUTION | RESULT |
|---|---|
| Breadth And Depth Of Solution Offering | 4.50 |
| Market Share And Growth | 3.00 |
| Customer Satisfaction | 4.25 |
| Price Versus Value Ratio | 4.50 |
| | 4.21 |

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# VENDOR SELECTION MATRIX™
## ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

**Atlassian is a market leader for global Enterprise Service Management Solutions and provides fluent service management for high performing product and service delivery.**

### GENERAL

Atlassian is an Australian technology firm with global headquarters in Sydney, Australia, and US headquarters in San Francisco, USA serving customers in over 190 countries. The company has reported $ 2.8 billion in 2022 revenue and today has more than 10,000 employees internationally. It has established itself as an automation software for software developers and project managers to manage teamwork but has expanded its offerings way beyond that.

### BOTTOM LINE

The success Atlassian had with developers across enterprise organizations across the globe is fueling its growth and success with its Jira Service Management. It recently announced great incentives for customers to switch over to Jira Service Management. For any organization who wishes to improve its relationship and a tighter alignment with sales, HR, finance, and other teams across the business Jira Service Management is a great choice.

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# VENDOR SELECTION MATRIX™
## ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

Atlassian is a market leader for global Enterprise Service Management Solutions and provides fluent service management for high performing product and service delivery.

### STRATEGY

Jira Service Management has been around since 2013 and today is used by more than 45,000 customers. Atlassian strategy is to drive growth within three major markets which include Agile/DevOps Work Management and Service Management. Its unique and close relationships with developers, DevOps teams is giving Atlassian the ability to expand into IT ops and other IT teams at companies of all sizes and across all industries expanding the adoption of Jira Service Management. Part of the strategy is a relentless focus on workflow automation and its ability to enable, improve and optimize collaboration of bringing teams together. Atlassian achieved the second highest score in our Recommendation Index.

### EXECUTION

The company shows steady financial performance and excellent growth across Jira Service Management. Free editions and recent customer incentives function as a growth engine for its sales funnel. Its partner program includes global alliance partners such as Capgemini and Accenture, solution partners, marketplace partners and platform partners such as AWS, Microsoft and Google. The survey respondents have given Atlassian the second highest score for both customer satisfaction and price versus value ratio.

| STRATEGY | RESULT |
|---|---|
| Vision And Go-To-Market | 4.50 |
| Innovation And Differentiation | 4.50 |
| Viability And Execution Capabilities | 4.00 |
| Recommendation Index | 4.50 |
| | 4.43 |

| EXECUTION | RESULT |
|---|---|
| Breadth And Depth Of Solution Offering | 4.75 |
| Market Share And Growth | 3.75 |
| Customer Satisfaction | 4.50 |
| Price Versus Value Ratio | 4.50 |
| | 4.46 |

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# VENDOR SELECTION MATRIX™
## ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

**BMC Software is a market leader for global Enterprise Service Management Solutions and delivers intelligent, interconnected service experience across employee, customers, developers, and technology partners.**

### GENERAL

BMC Helix offers a robust multi-Cloud and hybrid Cloud service management solution based on an open platform. BMC Helix helps organizations improve their productivity, control costs, increase visibility, and operate in secure environments. The BMC Helix solution portfolio is focused on elevating service experiences across all users through automation, intelligence, and personalization. BMC Helix Service Management empowers enterprises to digitize and to adopt to ongoing changes and market trends. As a software company with 40 years of experience in Service Management, BMC has a broad portfolio of solutions and innovations including AI, no-code visual workflow modelling, and more to help customers modernize. It has continuously shaped and enabled the Enterprise Service Management and IT service management agenda across global enterprises. Today, the company has more than 10,000 customers across the globe. Its total revenue in 2022 was around $ 2.1 billion.

### BOTTOM LINE

The BMC Helix solution portfolio and its partner ecosystem are an excellent choice for organizations interested in breaking down the silos across IT, lines of business, employees, and customers. BMC Helix Service Management (SM) integrates intelligent automation, an AI/ML process engine, AISM and RPA for predictive incident management and auto-correlation of events, remediation and additional insights and actions. BMC Helix SM can be leveraged to deliver services and workflow automation outside of IT while enabling enterprises to easily integrate their applications and data of choice. BMC has the broadest portfolio coverage (breadth and depth of the solution offering) of all vendors in the market.

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# VENDOR SELECTION MATRIX™
## ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

**BMC Software is a market leader for global Enterprise Service Management Solutions and delivers intelligent, interconnected service experience across employee, customers, developers, and technology partners.**

## STRATEGY

The BMC Helix strategy is to elevate user experiences across the digital enterprise – employees, customers, developers and technology partners. BMC Helix SM enables organizations to become unified, interconnected, intelligent, collaborative and value-creating systems powered by intelligent automation and simplifying complex processes. The outcome is that employees can shift to higher-value creation by automating work and optimizing workflows. In addition, BMC Helix is an open architecture that empowers enterprises to integrate their choice of data, applications, infrastructure, endpoint devices, data center and Cloud. The outcome will be ongoing value creation to ensure competitiveness and enable a successful digital transformation. Recent innovations such as BMC Helix for HR, intelligent self-service capabilities and extensions to its Knowledge Management capability have gained the attention of enterprise leaders. BMC has received the second highest score in our Recommendation Index.

## EXECUTION

Its execution roadmap in 2022 was focused towards supporting its strategy with solution innovations and ecosystem additions, and the product team have created a robust and differentiated solution. Their ongoing pivot towards a 'as-a-service' will need to be more precise and while the messaging is excellent, the path towards a 'Autonomous Digital Enterprise' needs to be more focused and connected across the offerings such as the AMI and the Control-M portfolio. Its ongoing platform narrative, however, has given BMC the top score for customer satisfaction, which is proof that the BMC Helix solutions are heading into the right direction. BMC Helix Service Management has achieved the highest score for both breadth and depth of its solution offering as well as customer satisfaction. It also achieved the second highest score for price versus value ratio.

| STRATEGY | RESULT |
|---|---|
| Vision And Go-To-Market | 4.50 |
| Innovation And Differentiation | 4.50 |
| Viability And Execution Capabilities | 4.75 |
| Recommendation Index | 4.50 |
| | 4.54 |

| EXECUTION | RESULT |
|---|---|
| Breadth And Depth Of Solution Offering | 5.00 |
| Market Share And Growth | 4.25 |
| Customer Satisfaction | 4.75 |
| Price Versus Value Ratio | 4.50 |
| | 4.68 |

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# VENDOR SELECTION MATRIX™
## ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

**Broadcom is a market leader for global Enterprise Service Management Solutions and enables IT and other business functions with data driven decisions and actions.**

### GENERAL

Broadcom Software, which homes the Agile Operations Division, includes a variety of product portfolios and solutions. As a division of Broadcom, the Software group includes what was Computer Associates, Symantec, Brocade, and AppNeta. Broadcom Software and its solutions are present within 80% of Fortune 500 customers. Some of its solution segments have enjoyed a 50% growth rate year over year. In May 2022, Broadcom announced the intention of acquiring VMware, a key server virtualization software provider.

### BOTTOM LINE

Broadcom's Software of IT and ESM solution (CA Service Management) growth is focused on its installed base. Almost all existing customers have specific challenges while shifting their siloed operating models and waterfall development towards digital high performing teams. Its installed base is satisfied with its solutions and are valuing the partnership with Broadcom Software. These customers need to scale their digital transformations including mainframe and across complex and hybrid architectures, services, and ecosystems. For these customers, Broadcom Software and its CASM solution are a great fit.

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# VENDOR SELECTION MATRIX™
## ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

**Broadcom is a market leader for global Enterprise Service Management Solutions and enables IT and other business functions with data driven decisions and actions.**

## STRATEGY

Broadcom Software is continuing to invest in the development of its solutions for its largest multinational customers who strive for scalability, agility, and security to manage complex hybrid IT environments. This work allows the different personas across enterprises IT and business functions to automate the workflows with a persona-based service management perspective. CASM automation enables productivity and efficiency improvements for both IT and non-IT. The solution components range from self-service portals, configuration management and analysis, knowledge management to the analysis of different value streams for agility and productivity improvements. CASM integrates with the other Agile management tools plus internal and external monitoring and operation solutions for extensive insights for decision makers across IT and the business. Broadcom has received the second highest score in our Recommendation Index.

## EXECUTION

Broadcom Software's Enterprise Software Division and its solution portfolio and strategy have been shaped by a seasoned leadership team in conjunction with its customers and partners. One key differentiator against its competition is that Broadcom's Enterprise Service Division solutions (which includes CA Service Management solution) are available in a starter edition, solution PLAs providing access to all solutions from one or more areas (e.g., ValueOps, AIOps, DevOps), or via unrestricted access to all components of ESD's solutions. The survey respondents have given Broadcom the second highest score for both customer satisfaction and price versus value ratio.

| STRATEGY | RESULT |
|---|---|
| Vision And Go-To-Market | 4.00 |
| Innovation And Differentiation | 4.50 |
| Viability And Execution Capabilities | 4.00 |
| Recommendation Index | 4.50 |
| | 4.28 |

| EXECUTION | RESULT |
|---|---|
| Breadth And Depth Of Solution Offering | 4.75 |
| Market Share And Growth | 4.25 |
| Customer Satisfaction | 4.50 |
| Price Versus Value Ratio | 4.50 |
| | 4.54 |

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# VENDOR SELECTION MATRIX™
## ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

**EasyVista is a market leader for global Enterprise Service Management Solutions and offers a cost-effective service automation solution.**

### GENERAL

EasyVista is headquartered in New York and Paris with offices around the globe. The company is backed by leading private equity firm Eurazeo. It´s service management platform helps companies to automate and personalize service delivery with the goals to improve IT and business efficiency and staff productivity. EasyVista serves companies across a variety of industries, including financial services, healthcare, higher education, technology, public sector, retail, manufacturing and more. The company has more than 3,000 customers.

### BOTTOM LINE

EasyVista is a good option for customers looking for a lightweight and easy to customize solution. Its out-of-the-box capabilities are a great way to set a solid ITSM or ESM foundation. Customers can easily install and upgrade the solution and each module has the same look and feel. All ITIL capabilities are easy to use and deliver. The recent acquisitions have extended its portfolio significantly and through this EasyVista offers capabilities above and beyond ITSM and ESM into ITOM as well.

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# VENDOR SELECTION MATRIX™
## ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

**EasyVista is a market leader for global Enterprise Service Management Solutions and offers a cost-effective service automation solution.**

## STRATEGY

EasyVista's strategy is to strengthen the service experience across both IT and enterprise services in an easy and cost-effective way. The company keeps extending its solution portfolio, adding customers and expanding its global reach through acquisitions, investments in R&D and talent expansion. Its partner-first strategy has allowed them to scale and increase its revenue streams. Excellent partner management has ensured that there is solid collaboration on lead generation, reselling and delivery. EasyVista generates about 32% of its revenue in the USA and plans to expand further across the globe. The company has received the second highest score in our Recommendation Index.

## EXECUTION

In support of its strategy, EasyVista has executed three major acquisitions (Goverlan, Coservit, Itexis) to expand its capabilities and their customer base. The latest acquisition of Itexis in June of 2022 added the ability to manage application service quality and has added over 200 customers across 5 continents. The acquisition of Coservit provides a holistic view of the health of IT infrastructure and Goverlan provides customers access remote support and self-healing technology. The survey respondents have given EasyVista the second highest score for both customer satisfaction and price versus value ratio.

| STRATEGY | RESULT |
|---|---|
| Vision And Go-To-Market | 4.50 |
| Innovation And Differentiation | 4.25 |
| Viability And Execution Capabilities | 3.75 |
| Recommendation Index | 4.50 |
| | **4.31** |

| EXECUTION | RESULT |
|---|---|
| Breadth And Depth Of Solution Offering | 4.50 |
| Market Share And Growth | 3.50 |
| Customer Satisfaction | 4.50 |
| Price Versus Value Ratio | 4.50 |
| | **4.35** |

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# VENDOR SELECTION MATRIX™
## ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

**Freshworks is a market leader for global Enterprise Service Management Solutions and helps organizations modernize IT and unify service delivery across business teams.**

### GENERAL

Founded in 2010, Freshworks takes a fresh approach to business software by building and delivering software that's quick to implement, intuitive, and cost effective. Since its inception, Freshworks has experienced remarkable growth in both IT and Enterprise Service Management. In Q4 of 2022, Freshservice launched Freshservice for Business Teams to unify IT and business teams with a single service management solution for fast, easy and seamless employee services. Headquartered in San Mateo, CA, Freshworks operates from 13 global offices and has 5000+ employees serving global enterprises of all sizes. Its solutions have successfully transformed small, medium and large enterprises in their digital transformation journey, and helped organizations realize value faster.

### BOTTOM LINE

Powered with intelligent automation, Freshworks makes it easy to improve employee productivity, maximize business availability, and realize value faster. The software is extremely intuitive, easy to use, quick to onboard and affordable for organizations fitting any budget. It delivers all key functionalities and capabilities essential for improving employee and customer experiences. The company will continue to innovate and expand beyond its already broad solution set with new capabilities and features.

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# VENDOR SELECTION MATRIX™
## ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

**Freshworks is a market leader for global Enterprise Service Management Solutions and helps organizations modernize IT and unify service delivery across business teams.**

## STRATEGY

Freshworks' vision and strategy is to optimize and automate the total experience among employee and customers with an intuitive, scalable, and cost-effective platform. The Freshworks Neo platform is an intelligent  platform with central functions such as administration, analytics, event, and messaging services plus more. Atop sit the products which address specific lines of business such as HR, Finance, Facilities, Marketing to automate their IT or ESM workflows. Key modules such as Unified Analytics provide insights across Freshworks and other external data sources for improved decision-making. Freshworks has received the second highest score in our Recommendation Index.

## EXECUTION

Freshworks' vision and its existing product portfolio has attracted many new customers and has served its existing customers extremely well. Freshworks strength of delivering software-as-a-service that's affordable, quick to implement, designed for the end-user, with excellent TCO and ROI, rightsizing of the solutions, easy and extensible usage, and intuitiveness are unique in the market. Its rapid growth and expansion is also attributed to its excellent partner program. The survey respondents have given Freshworks the second highest score for customer satisfaction and the highest score for the price versus value ratio.

| STRATEGY | RESULT |
|---|---|
| Vision And Go-To-Market | 4.75 |
| Innovation And Differentiation | 4.50 |
| Viability And Execution Capabilities | 4.00 |
| Recommendation Index | 4.50 |
| | 4.50 |

| EXECUTION | RESULT |
|---|---|
| Breadth And Depth Of Solution Offering | 4.75 |
| Market Share And Growth | 4.50 |
| Customer Satisfaction | 4.50 |
| Price Versus Value Ratio | 4.75 |
| | 4.65 |

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# VENDOR SELECTION MATRIX™
## ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

**IFS is a market leader for global Enterprise Service Management Solutions and offers a broad set of service automations.**

### GENERAL

IFS is a global enterprise software company founded in 983 and headquartered in Stockholm, Sweden. IFS has over 5,000 employees and serves and supports customers across the globe. It serves key verticals such as aerospace and defense, energy, manufacturing engineering, and services. It has entered the ESM market through its acquisition of Axios Systems in January 2021. This acquisition was an essential capability for its customers to expand IFS's ability to automate workflows for its vertical customers for better collaboration and efficiency improvements.

### BOTTOM LINE

For enterprises who are looking for a broad solution in automating every aspect of ITIL, IFS Axios Assyst is a good alternative. Its dashboard, REST API and process designer allows for customization to fit large and small automation needs. Integration into other IFS solutions such as Customer Experience Management, Enterprise Asset Management and Field Service Management are providing complete service experience capabilities.

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# VENDOR SELECTION MATRIX™
## ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

IFS is a market leader for global Enterprise Service Management Solutions and offers a broad set of service automations.

## STRATEGY

IFS overall strategy is to deliver solutions as part of an ecosystem of applications and services used by enterprise corporate IT teams. Key to this strategy is the IFS cloud and its capabilities are designed to orchestrate assets, people and customers across "Moments of Service" (which is the company's marketing slogan) for key industry verticals. IFS has established itself as a key partner in Field Service Management (FSM), Enterprise Asset Management (EAM) and Enterprise Resource Planning (ERP). IFS assyst is designed to address the service management use cases across the different line of business applications.

## EXECUTION

IFS has achieved exceptional results with software revenue growth of 28 percent year-on-year. A new partner program was launched in 2022 to accelerate the partner strategy and broaden its reach. Key trends such as the convergence of services and assets, an increased focus on employee experience, and the growing role of intelligent and autonomous services (e.g., in the field service management space particular) have allowed IFS to extend its leadership.

| STRATEGY | RESULT |
|---|---|
| Vision And Go-To-Market | 4.00 |
| Innovation And Differentiation | 4.00 |
| Viability And Execution Capabilities | 4.00 |
| Recommendation Index | 4.25 |
| | 4.06 |

| EXECUTION | RESULT |
|---|---|
| Breadth And Depth Of Solution Offering | 4.50 |
| Market Share And Growth | 4.00 |
| Customer Satisfaction | 4.25 |
| Price Versus Value Ratio | 4.25 |
| | 4.29 |

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# VENDOR SELECTION MATRIX™
## ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

Ivanti is a market leader for global Enterprise Service Management Solutions and offers automation and intelligence for IT and other business functions.

### GENERAL

Headquartered outside of Salt Lake City, Utah, Ivanti has been present in the IT automation space and its IT Service Management portfolio goes back to two primary corporate entities of LANDesk Software and HEAT Software. Its target customers are mid- to large enterprises which are served and supported through 36 offices across 23 nations. The company has more than 3,000 employees today and its partners have grown to over 4,000 serving more than 38,000 customers globally.

### BOTTOM LINE

Ivanti is an excellent choice for organizations looking for unified endpoint management, zero trust security and service management solutions from a single vendor. The solutions provide a single pane of glass for enterprises to secure and heal devices, and to service end users across all business functions. Additionally, the solution is customizable to fit a broad and deep set of requirements. Is excellence in support has most likely added to the high customer satisfaction.

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# VENDOR SELECTION MATRIX™
## ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

Ivanti is a market leader for global Enterprise Service Management Solutions and offers automation and intelligence for IT and other business functions.

## STRATEGY

Ivanti's strategy is to empower organizations to execute on business outcomes such as excellence in customer experience; operational excellence and risk management. Its automation platform, Ivanti Neurons, is one part of this strategy. The Neurons platform is powered through artificial intelligence, and uses machine and deep learning to self-heal, self-secure devices, and enable self-service for end users. The acquisitions of Mobile Iron and Pulse Secure, enables Ivanti to converge Unified Endpoint Management, Zero Trust Security, Experience, and IT and Enterprise Service Management capabilities offering personalized, contextual service management for IT and business users. Ivanti's service management portfolio is focused on transformation of Enterprise, IT, and Asset Management with tight integration into Security use-cases. Ivanti has received the second highest score in our Recommendation Index.

## EXECUTION

Ivanti has completed more than ten major acquisition in the past years and with these acquisitions has built a comprehensive solution portfolio. The customer base continues to grow across all verticals and all sizes. Changes in priorities such as cybersecurity, everywhere workplaces and budget sensitivity have helped Ivanti to accelerate its growth and expand its solution portfolio. Ivanti has received the highest score for customer satisfaction and the second highest score for price versus value ratio.

| STRATEGY | RESULT |
|---|---|
| Vision And Go-To-Market | 4.50 |
| Innovation And Differentiation | 4.50 |
| Viability And Execution Capabilities | 4.00 |
| Recommendation Index | 4.50 |
| | 4.43 |

| EXECUTION | RESULT |
|---|---|
| Breadth And Depth Of Solution Offering | 4.75 |
| Market Share And Growth | 4.00 |
| Customer Satisfaction | 4.75 |
| Price Versus Value Ratio | 4.50 |
| | 4.56 |

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# VENDOR SELECTION MATRIX™
## ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

**MATRIX42 is a market leader for global Enterprise Service Management Solutions and delivers solid and secure digital service experiences.**

### GENERAL

Matrix42 headquartered in Frankfurt, Germany has been in the IT automation market since 1992. Its vision of the digital workplace has inspired its employees and customers over many years. Over 5,000 global mid-size and enterprise customers are leveraging one or more of its digital workspace solutions which includes Enterprise Service Management, Secure Unified Endpoint Management and its Digital Workspace Platform. The Matrix42 Digital Workspace Platform is a low-code platform, which enables the design and automation of any service management process and is foundational to all its products.

### BOTTOM LINE

Matrix42 keeps gaining recognition as a major player within Enterprise Service Management with focus on supporting and accelerating the future of work, providing vision and ambitions for enterprises across many verticals. Matrix42 Digital Workspace Platform is the basis of all Matrix42 products and thus an essential component of Matrix42 Enterprise Service Management. Its ESM solution is an excellent choice as it offers a powerful combination of functions for configuration, automation, and integration of enterprise services with built-in security.

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# VENDOR SELECTION MATRIX™
## ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

**MATRIX42 is a market leader for global Enterprise Service Management Solutions and delivers solid and secure digital service experiences.**

## STRATEGY

Matrix42 continues to enable IT enterprises in their delivery of excellent and secure digital service experiences across organizations and their business units. A key part of its strategy is to enable its customers to standardize and manage all IT and non-IT processes and services, from provisioning to Service Lifecycle Management and End-of-Life. Matrix42 has strengthened its market positioning over the years through continuous product development, add on acquisitions, expansions into new regional areas and internationalization. In March 2022, the company hired a new Chief Marketing/Product Manager and made some other changes within the C-suite. Matrix42 has received the highest score in our Recommendation Index.

## EXECUTION

Its strategy to lead ESM and to continue with ITSM has provided continuous growth for the company. Its push of digital workspace is just one example of the company's execution path. The 2021 inclusion of investors of Corton Capital and their experience are now tightly integrated into its strategy and execution. Matrix42 also keeps focusing on expansion into the global market and currently has over 500 customers across EMEA and North America. Additional support for growth and expansion comes from over 80 partner companies across the globe. The survey respondents have given Matrix42 the highest score for customer satisfaction and price versus value ratio.

| STRATEGY | RESULT |
|---|---|
| Vision And Go-To-Market | 4.50 |
| Innovation And Differentiation | 4.50 |
| Viability And Execution Capabilities | 4.00 |
| Recommendation Index | 4.75 |
| | 4.49 |

| EXECUTION | RESULT |
|---|---|
| Breadth And Depth Of Solution Offering | 4.50 |
| Market Share And Growth | 3.75 |
| Customer Satisfaction | 4.75 |
| Price Versus Value Ratio | 4.75 |
| | 4.53 |

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# VENDOR SELECTION MATRIX™
## ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

**Micro Focus is a market leader for global Enterprise Service Management Solutions and enables intelligent automation with its AI driven platform.**

## GENERAL

Micro Focus leads the category of Enterprise Service Management with its Service Management Automation X (SMAX) platform engineered for scale, productivity improvements and continuous improvement through automation and analysis of IT and business processes. The company has 14,000 employees in 43 countries worldwide. Micro Focus was acquired by OpenText. The acquisition was completed in January 2023.

## BOTTOM LINE

Micro Focus SMAX enables extensible, efficient and affordable service management with its intelligent automation engine. It  provides contextual user experiences which are essential for ongoing and satisfying service supply and demand work across IT and other functional areas. The OpenText acquisition is expected to accelerate Micro Focus Cloud growth and improve Micro Focus renewals. The solution will leverage  the proven OpenText Business System to drive accretive integration of Micro Focus. Micro Focus has the broadest portfolio coverage (breadth and depth of the solution offering) of all vendors in the market.

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# VENDOR SELECTION MATRIX™
## ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

**Micro Focus is a market leader for global Enterprise Service Management Solutions and enables intelligent automation with its AI driven platform.**

## STRATEGY

Micro Focus strategy for ESM is to enable enterprises to compose their workflow automation solution relative to their goals and grow from there. The Service Management Automation X (SMAX) platform consists of composable solution offerings including ITSM, AM, ESM, CMP and RPA all usable through a single portal leveraging unified topologies, orchestration and intelligent automation engines. The data from the modules is stored in a data lake so that AI and ML technologies, which are part of the platform, can be leveraged for insights and analytics. Integrations into competitive automation solutions allows SMAX to be the central automation platform for all IT and business workflows, protecting previous automation investments. Micro Focus has achieved the highest score in our Recommendation Index.

## EXECUTION

The drive towards a digital business requires enterprises to optimize and automate their existing value streams and workflows. The Micro Focus team has engineered SMAX so that service owners can easily automate workflows around contract, asset, service, user, to SLA. While all is supported through a common data model as the data sits on the same technical platform, workflow owners can analyze and gain insights for process (or flow) improvements. The solution is leveraged by over 500 global enterprises, including companies such as Boeing and Verizon Connect. Customers from all verticals and geographic locations like SMAX, its breadth and depth and the ability to consume functional modules on a common technical platform. The survey respondents have given Micro Focus the highest score for both customer satisfaction and price versus value ratio.

| STRATEGY | RESULT |
|---|---|
| Vision And Go-To-Market | 4.75 |
| Innovation And Differentiation | 4.75 |
| Viability And Execution Capabilities | 5.00 |
| Recommendation Index | 4.75 |
| | **4.79** |

| EXECUTION | RESULT |
|---|---|
| Breadth And Depth Of Solution Offering | 5.00 |
| Market Share And Growth | 4.25 |
| Customer Satisfaction | 4.75 |
| Price Versus Value Ratio | 4.75 |
| | **4.75** |

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# VENDOR SELECTION MATRIX™
## ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

**ServiceNow is the winner for global Enterprise Service Management Solutions and continues to accelerate enterprise-wide digital transformation leveraging its low code platform.**

### GENERAL

Since its inception in 2004, ServiceNow has grown to become a platform for digital business, enabling its customers to automate almost any workflow. With a focus on enterprise and commercial accounts, the company serves over 7,700 customers, including more than 80% of the Fortune 500. Over 20,500 employees and 1,500 partners worldwide helped the company grow year-over-year revenue by 28.5%, earning $ 6.9 billion in 2022. The company also received an award as a great place to work and is part of the Fortune World's most admired companies in 2022.

### BOTTOM LINE

The ServiceNow platform and its extensions, add-ons and broad capabilities are an excellent choice for large enterprise organizations automating, reengineering or optimizing existing or developing new workflows. While its roots are in IT service management, the platform and its modules can be leveraged to connect different processes, events, data, or resources for holistic digital value streams. This provides different functions (e.g., IT, HR, Workplace, Legal, Procurement, Customer, Field Service, and more) to collaborate and deliver a connected experience in context of the relative ecosystem and needs. ServiceNow has the broadest portfolio coverage (breadth and depth of the solution offering) of all vendors in the market.

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# VENDOR SELECTION MATRIX™
## ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

ServiceNow is the winner for global Enterprise Service Management Solutions and continues to accelerate enterprise-wide digital transformation leveraging its low code platform.

### STRATEGY

The company's strategy is to be the digital business platform for enterprises. While the ServiceNow platform automates any workflow, the company showcases its breadth and depth contextual to the different personas across an enterprise. The vision is enabling organizations to connect functions and processes together into holistic, cross-enterprise value streams. Its portfolio includes the Now Platform and many standardized applications designed for automating any workflow. It also includes Creator workflows, which support custom workflow creation, application development, and integration with third party systems. Artificial Intelligence and the continuous optimization of people, processes, and technology continues to aid ServiceNow in its market presence. ServiceNow has received the highest score in our Recommendation Index.

### EXECUTION

The power and depth of the ServiceNow platform is extended through its large ecosystem which consists of hundreds of Sales, Services, Technology, Service Provider, Public Sector and Authorized Training Partners. Additionally, expert services, training, certifications and customer success teams are focused on supporting its customers with developed practices, advice, and support. The company has focused sales and marketing on several key industry verticals across the world including government, financial services, telecommunications, manufacturing, retail, transportation, healthcare, MSPs, education, and energy/utilities. The survey respondents have given ServiceNow the second highest score for both customer satisfaction and price versus value ratio.

| STRATEGY | RESULT |
|---|---|
| Vision And Go-To-Market | 5.00 |
| Innovation And Differentiation | 4.75 |
| Viability And Execution Capabilities | 5.00 |
| Recommendation Index | 4.75 |
| | 4.86 |

| EXECUTION | RESULT |
|---|---|
| Breadth And Depth Of Solution Offering | 5.00 |
| Market Share And Growth | 5.00 |
| Customer Satisfaction | 4.50 |
| Price Versus Value Ratio | 4.50 |
| | 4.73 |

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# VENDOR SELECTION MATRIX™
## ENTERPRISE SERVICE MANAGEMENT

SolarWinds is a market leader for global Enterprise Service Management Solutions and fast-tracks the collaboration between service development and service delivery.

### GENERAL

SolarWinds has been in IT automation software for more than 20 years. Its global headquarters is in Austin, Texas with additional 20 offices around the world and today the company has more than 2,300 employees globally. Its portfolio of solutions includes a variety of IT automation software to support IT professionals accelerating service development and service delivery. A variety of acquisitions have accelerated its ability to extend its solution portfolio.

### BOTTOM LINE

SolarWinds has been able to refocus its vision and strategy towards both service development and service delivery and has complimented its SolarWinds platform with service management to automate IT workflows between the different roles in IT. The company continues to enhance its solutions to accelerate the cooperation and collaboration between the different roles within IT to enable business functions towards their goals.

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# VENDOR SELECTION MATRIX™
## ENTERPRISE SERVICE MANAGEMENT

SolarWinds is a market leader for global Enterprise Service Management Solutions and fast-tracks the collaboration between service development and service delivery.

### STRATEGY

SolarWinds background in monitoring and insights across existing applications, services and resources is the foundation of its SolarWinds Platform. The platform itself is a blend of solutions across network, infrastructure, systems, application, database, digital experience, and log monitoring for both private and public clouds. SolarWinds positions its SolarWinds ITSM solutions (which includes Service Desk and remote management tools) to automate the many different workloads in between and across IT roles within IT Ops, DevOps, developers, and cloud architects. Its vision is to ensure that IT teams can remediate and ensure resilient application and service resources to enable enterprise's ability to operate. SolarWinds has received the second highest score in our Recommendation Index.

### EXECUTION

The acquisition of Samanage has given SolarWinds the ability to offer Service Desk and ITSM capabilities to its customers. Its Service Desk solution is tightly integrated with the rest of the SolarWinds platform and offers essential capabilities for service management within IT and beyond. Additional innovations and integrations will expand and enhance SolarWinds market share in this space. The survey respondents have given SolarWinds the second highest score for the price versus value ratio.

| STRATEGY | RESULT |
|---|---|
| Vision And Go-To-Market | 4.25 |
| Innovation And Differentiation | 4.00 |
| Viability And Execution Capabilities | 4.00 |
| Recommendation Index | 4.50 |
| | 4.20 |

| EXECUTION | RESULT |
|---|---|
| Breadth And Depth Of Solution Offering | 4.25 |
| Market Share And Growth | 3.50 |
| Customer Satisfaction | 4.25 |
| Price Versus Value Ratio | 4.50 |
| | 4.21 |

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# VENDOR SELECTION MATRIX™
## ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

**TOPdesk is a market leader for global Enterprise Service Management Solutions and continues to delight its customers across key industry verticals.**

### GENERAL

TOPdesk is a Dutch software house, offering solutions across IT and Enterprise Service Management for over 25 years. The company has over 900 employees and more than 5,000 customers today. Its global footprint includes 15 offices across 11 countries. Installed base customers range from retail, government, industrial, travel to financial and insurance verticals.

### BOTTOM LINE

TOPdesk has all the necessary capabilities, functionalities, and innovations of an excellent ESM and ITSM automation vendor to enable enterprises automating while optimizing their workflows. It allows service teams to quickly and easily implement customer experience workflows in verticals such as health care, B2B and non-profit. For organizations who want to grow into ESM, its attractive pricing models, its capabilities to service and support its customers are well known and touted in the ESM market globally already.

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# VENDOR SELECTION MATRIX™
## ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

**TOPdesk is a market leader for global Enterprise Management Solutions and continues to delight its customers across key industry verticals.**

## STRATEGY

TOPdesk strategy is to focus its efforts on customers with a few thousand of employees, which might be at the beginning stage of workflow automation or are leveraging home-grown or open-source solution. Its go-to-market approach is to offer its ESM product and services via a direct sales team to key IT-decision makers in combination with guidance and support for their ESM or ITSM journey. Key target markets for expansion are Germany and the USA. The company has made a variety of adjustments across product, sales and other lines of business and has executed well in 2022 with a growth rate of more than 20%. TOPdesk has has received the second highest score in our Recommendation Index.

## EXECUTION

The company has been developing, selling and supporting ITSM and ESM journeys of customers for over 25 years. It continues to expand its extensive partner network and today has more than 80 partners. Its modular solution and ability to work side by side with its customers has accelerated and allowed its customers to embrace Enterprise Service Management from initial efforts in IT Service Management. TOPdesk has one product which is available in three different packages, all supported with service offerings at different price points. This allows customers to align their value objectives with their budgets with the option to expand. The survey respondents have given TOPdesk the second highest score for both customer satisfaction and price versus value ratio.

| STRATEGY | RESULT |
|---|---|
| Vision And Go-To-Market | 4.50 |
| Innovation And Differentiation | 4.75 |
| Viability And Execution Capabilities | 4.25 |
| Recommendation Index | 4.50 |
| | 4.54 |

| EXECUTION | RESULT |
|---|---|
| Breadth And Depth Of Solution Offering | 4.75 |
| Market Share And Growth | 3.75 |
| Customer Satisfaction | 4.50 |
| Price Versus Value Ratio | 4.50 |
| | 4.46 |

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# THE RESEARCH IN ACTION GMBH VENDOR SELECTION MATRIX™ METHODOLOGY

## Vendor Selection Matrix™ Disclaimer:

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## About:

Research In Action GmbH is a leading independent information and communications technology research and consulting company. The company provides both forward-looking as well as practical advice to enterprise as well as vendor clients.

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# APPENDIX: IT AUTOMATION MARKETEXTURE DEFINITIONS

- **Application Discovery and Dependency Mapping (ADDM)** solutions automatically discover various applications running on server and network devices within the business hybrid infrastructure and maps the dependencies between them providing a holistic view of all the resources running and the relationships between them.

- **Application Performance Management (APM)** solutions manage the performance and health of applications within a IT enterprise.

- **AI Powered Chatbot Platforms** which are used to build applications that answer questions, provide advice and/or recommendations using natural language processing and other dialog related technologies.

- **Artificial Intelligence and Machine Learning (AI/ML)** are both technologies and are leveraged in automation solutions. Artificial intelligence (AI) is the ability of a computer program or machine to think and learn (AI can mimic human cognition). Within IT Automation AI is used to correctly interpret a variety of data, to learn from such data, and to use those learnings to achieve specific goals and tasks through flexible adaptation. Machine learning enables computers with the ability to learn without being programmed (explicit algorithms). It explores the study and construction of algorithms which can learn and make predictions on data. The algorithms follow programmed instructions or can make predictions or decisions based on the data. Machine learning is used when explicit algorithms cannot be done (e.g., computer vision, search engines, optical character recognition).

- **Artificial Intelligence for Operations (AIOps)** solutions equip IT enterprise teams with analysis of volumes and categories of data to improve key processes, tasks and decision making. The adoption of these tools automates the ingestion of fast volumes of data; leverage machine learning to analyze the data, present findings to either predict or alert on issues, and leverage the knowledge for automation or decision making.

- **Application Release Orchestration (ARO)** solutions equip IT enterprise organizations and their teams with the automation of the software deployment cycle across hybrid technology environments.

- **Configuration Management Database (CMDB)** is a database which captures IT components referred to as configuration items (CIs), which can be software, hardware, a document, article, or any such item that is part of the information system of the organization.

- **Continuous Hybrid Management (CHM)** platforms or solutions that empower, automate and continuously manage the ongoing demands of all digital functions within an enterprise no matter if they are within IT or business teams.

- **Connected Service Management (CSM)** platforms or solutions are part of the management domain which manage the entire spectrum of customer, employee and digital experiences.

- **Digital Process Management (DPM)** solutions automate and manage the digital processes across different business functions.

- **Enterprise Service Management (ESM)** is a category of business management software - typically a suite of integrated applications that a service organization uses to capture, manage, save and analyze data critical to their service business performance. It automates service offerings across internal functional areas such as (1) Human resources, (2) Vendor management, (3) Technical services, (4) Field services, (5) Financial management and (6) Shared services organizations.

- **Hybrid Cloud Management (HCM)** solutions manage the Cloud infrastructures and applications from an end-to-end perspective.

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# APPENDIX: IT AUTOMATION MARKETEXTURE DEFINITIONS

- **IT Asset Management (ITAM)** software manages the full lifecycle of IT assets which typically includes all software, hardware, networking, Cloud services, and client devices. In some cases, it may also include non-IT assets such as buildings or information where these have a financial value and are required to deliver an IT service. IT asset management can include operational technology (OT), including devices that are part of the Internet of Things. These are typically devices that were not traditionally thought of as IT assets, but that now include embedded computing capability and network connectivity.
- **IT Financial Management (ITFM)** software enables the accurate and cost-effective management of IT assets and resources with the aim to plan, control, recover (or overall manage) costs which are occurring while providing IT and Enterprise Services to the organization.
- **The IT Infrastructure Library (ITIL)** is the de facto standard for IT Service Management process definitions today.
- **IT Operations Management (ITOM)** solutions monitor and control IT Services and infrastructure and enable IT to execute routine tasks necessary to support the operation of applications, services and hardware components within an organization; typically included are the provisioning of IT infrastructure, capacity management, cost-control activities, performance and security management and availability management for all IT infrastructure and assets.
- **IT Service Management (ITSM)** refers to the entirety of activities – directed by policies, organized and structured in processes and supporting procedures – that are performed by an organization to plan, design, deliver, operate and control Information Technology (IT) services offered to internal customers. It is thus concerned with the implementation of IT Services that meet customers' needs, and it is performed by the IT service provider through an appropriate mix of people, process and information technology.
- **Observability** solutions enable the aggregating, correlating and analyzing of steady streams of performance data from distributed applications and the hybrid infrastructure which support the applications.
- **Robotic Process Automation (RPA)** solutions enable the automation of tasks, processes and procedures which are normally conducted by a human. RPA solutions create software robots that mimic human actions. Typically, these are tasks that a human would do. (Ro)Bots and Virtual Agents are part of RPA solutions.
- **Secure Unified Endpoint Management (SUEM)** software enables the management and securing of mobile applications, content, collaboration and provides for the management of all endpoints like smartphones, tablets, laptops, printers, ruggedized devices, Internet of Things (IoT) and wearables.
- **Technology Cost Management (TCM) or Technology Business Management (TBM)** software enables the planning, management and visibility of the supporting and required business and IT technology resources from a cost and capacity perspective by visualizing, planning, prioritizing and optimizing the usage and demands of technology resources (people, processes and technologies) for the enterprise.
- **Value Stream Management (VSM)** software solutions capture, visualize, and analyze the flow of work across the entire Agile software delivery project. The capabilities include end-to-end visibility, traceability and governance over the entire process and help to plan, track, and steer work at the team, program, portfolio, and enterprise levels. It includes the people working on a project, the systems which are operated and leveraged, and the flow of information and materials between teams. It enables the measurement of speed and quality for digital transformations.

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