

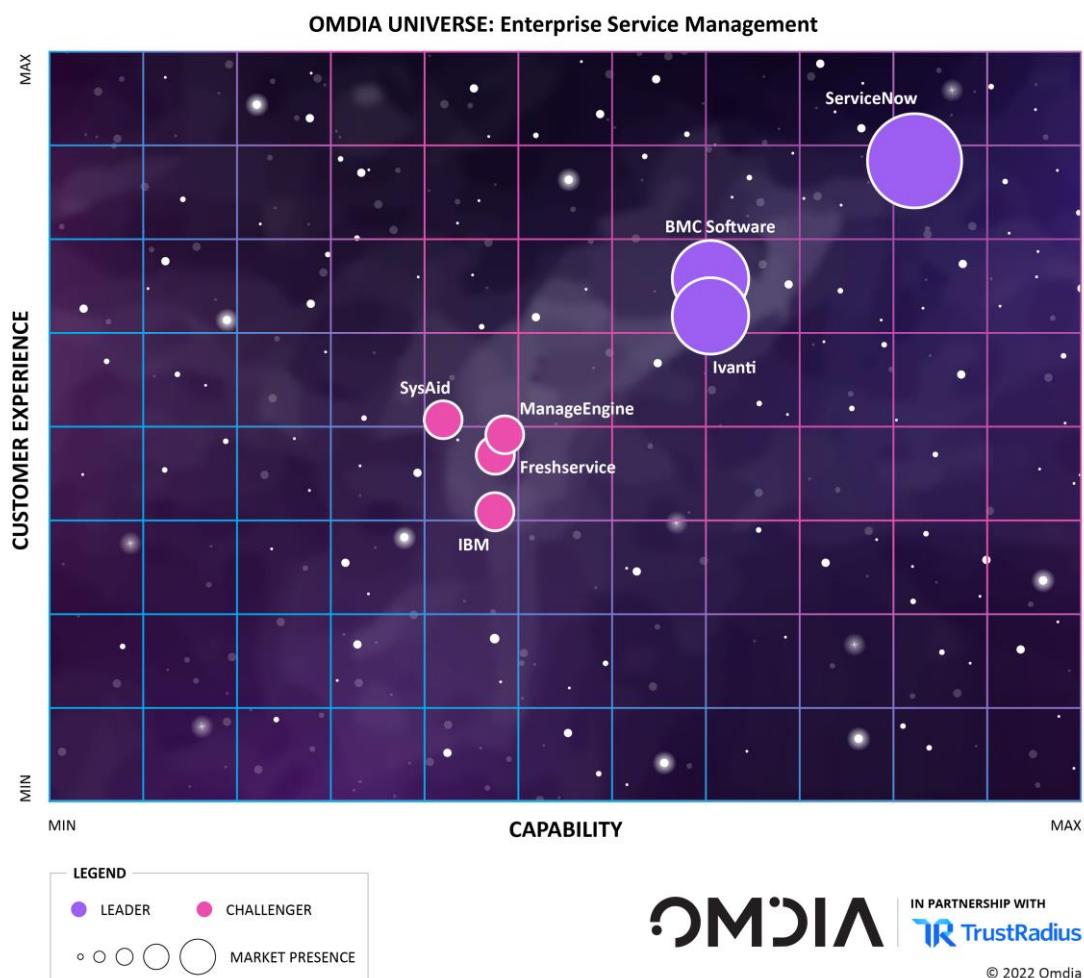
Selecting an Enterprise Service Management Solution, 2022–23

Summary

Catalyst

Enterprise service management (ESM) capabilities are being adopted by a broad range of business functions, including IT, HR teams, facilities management, and customer services to improve operations and employee experience. In extending beyond the traditional IT use case, ESM solutions are becoming a valuable business solution helping organizations improve infrastructure and operations activities, in addition to supporting efforts to digitize and automate IT and business processes. This Omdia Universe provides an evaluation of ESM solutions to help both IT and business leaders select an ESM platform that best suits their requirements and long-term goals.

Figure 1: The Omdia Universe for Enterprise Service Management



Source: Omdia

Omdia view

Helping businesses improve technical support is the area that IT service management (ITSM) solutions have traditionally been associated with. However, these solutions have evolved well beyond their technical support heritage in becoming solutions capable of servicing a broader business purpose. As automation and business process improvement have become important business priorities, service management solutions have evolved their capabilities to become platforms that help organizations improve the workflows and processes that guide how work gets done. Now, service management solutions offer much more than just ticketing and service desk capabilities—they are an important tool in maintaining broader business and IT infrastructure and operations. ITSM solutions have long been a vital back-office solution, enabling businesses to keep the operational lights on, so to speak, whilst also supporting efforts to innovate with new digital capabilities.

Whilst the majority of the core back-office capabilities offered by ITSM tools are rarely noticed by employees, the value these capabilities deliver in supporting the applications and systems employees use end-to-end is vital. At the core of this extended value proposition are workflow automation and digitization capabilities geared specifically to the needs of multiple business functions. This cross-functional capability enables businesses to develop contextualized and automated workflows that extend beyond the enterprise IT department, thus helping enterprises break down business siloes at a process level. Within customer service, for example, front and back-office process-level integration means that agents can efficiently manage customer issues and resolve them more quickly. Additionally, more advanced capabilities such as virtual agents (to automate manual processes) or low-code solutions (to easily script workflow and develop micro-apps) can be developed on top of this integrated platform and data set. These advancements have made ESM solutions an important digital transformation enabler, supporting businesses in better integrating the different systems and services in use across the business, in addition to the workflows that sit across them. In many ways, service management platforms have become the digital transformation engine room.

Key messages

- Enterprise service management capabilities have become a key solution in supporting broader business digital transformation efforts.
- Interest in ESM solutions is being driven by a range of business priorities and objectives, including the need to better integrate, digitize, automate, and manage the workflows and processes that guide modern-day business operations.
- ServiceNow remains the most dominant vendor in this market, with its strong capability set being complemented by its strong market mindshare both in and away from the IT department.
- Ivanti's proposition continues to evolve in interesting ways, especially in how it supports businesses embarking on future of work initiatives.

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- BMC, a new entrant to this 2022 report revision, also offers a strong ESM proposition, particularly relating to its operations management capabilities.

Analyzing the ESM universe

How to use this report

Omdia is a proud advocate of the business benefits derived from technology. The Omdia Universe report is not intended to advocate an individual vendor, but rather to guide and inform the selection process to ensure all relevant options are considered and evaluated efficiently. The report findings gravitate towards the customer's perspective and likely requirements, characteristically those of a medium-large multinational enterprise (5,000+ employees). Typically, deployments are considered across the financial services, TMT (technology, media, and telecoms), and government sectors on a global basis. This document is an update of the *Omdia Universe: Enterprise Service Management – 2021* report.

Market definition

Enterprises must remember that any successful ESM initiative is reliant on much more than just technology. Technology is, however, an important element of any initiative, increasingly being used by businesses in optimizing, automating, and better integrating the processes and workflows that guide how work gets done across multiple different business units. Omdia defines ESM as the use of service management capabilities and practices within IT, but also by other business functions, most notably within HR, finance, facilities management, and customer service teams. ITSM capabilities are very much the heritage and foundation of ESM capabilities, but Omdia also feels it important to highlight how ITSM solutions are increasingly delivering value to departments beyond just IT. Consequently, Omdia has identified a set of capabilities (listed below) that support businesses looking to improve process and employee support efficiencies through ESM. Traditional IT service management capabilities are still very much the foundation set of capabilities that ESM solutions are built upon and, as such, is foundational to this report. However, in addition to these core capabilities, we also explored some of the more disruptive features commonly associated with ESM.

- **IT Infrastructure and Service Management:** Exploration of the core IT service management capabilities offered by the solutions assessed. ITSM capabilities are a core feature set of any ESM solution, as it is from these features that ESM tools have evolved. Features including incident management, change management, service level management, and problem management are all explored.
- **IT Operations Management:** These capabilities support the health of technology infrastructure and digital services that businesses are reliant on, enabling monitoring and response to important events. Discovery capabilities that allow businesses to build a picture of the services offered and the components that help deliver these service ecosystems are important features. Vendor and cloud management capabilities are also considered as part of operations management.

- **Security Operations:** Organizational security controls require a combination of people, processes, and technology. For the technological component, organizations are reliant on a wide variety of security products and services. Service management platforms are increasingly offering features that help businesses better integrate investments in core security capabilities and solutions, in addition to being important in managing security incidents. The section explores these capabilities, in addition to how the impact of security incidents can be managed and mitigated.
- **IT Business Management:** These capabilities explore how service management solutions support business activities around areas including project and work management, cost management, policy management, and supplier management.
- **Deployment and Integrations:** The capabilities available that support efficient deployment of the service management solution, in addition to an exploration of the integration features offered.
- **Business Workflows:** This capability category explores the custom and native features offered by service management platforms that have applicability to teams beyond just the IT department, such as HR, facilities management, customer service representatives, and other frontline workers.
- **Digital Employee Experience:** As the world of work changes in becomes more flexible, businesses must evolve support processes and self-service approaches to better support more mobile-first workforces. Capabilities explored in this category support admins and employees with better service management experiences when working in a more mobile fashion. Additional features in this category explore self-service, workflow development, service catalog and marketplaces, and digital workspace capabilities that all help improve employee experiences.
- **Reporting and Analytics:** Analysis of the capabilities offered by ESM tools that help businesses measure and report on important service management activities. Performance analytics, process health and status, benchmarking, and report customization are examples of features explored as part of this capability.

Market dynamics

There are a variety of business needs and priorities that are driving interest and adoption of ESM capabilities. According to the 2021 HDI *The State of Enterprise Service Management* report (see *Further reading*), those adopting new service management solutions are doing so to improve customer and employee experiences, evolve service delivery models and approaches, and upgrade from older solutions and toolsets. Priorities attached to automating and digitizing cross-functional workflows are other business priorities. This value proposition is accelerating the adoption of what has traditionally been an IT-centric solution into the broader business. According to the 2021 HDI *The State of Enterprise Service Management* report, just over half of respondents reported using ITSM practices and principles outside the IT department. There is huge potential to further grow service management capability and practice adoption into the broader enterprise, but doing so will require that stakeholders beyond just IT are better aware of the benefits. The evolved ESM

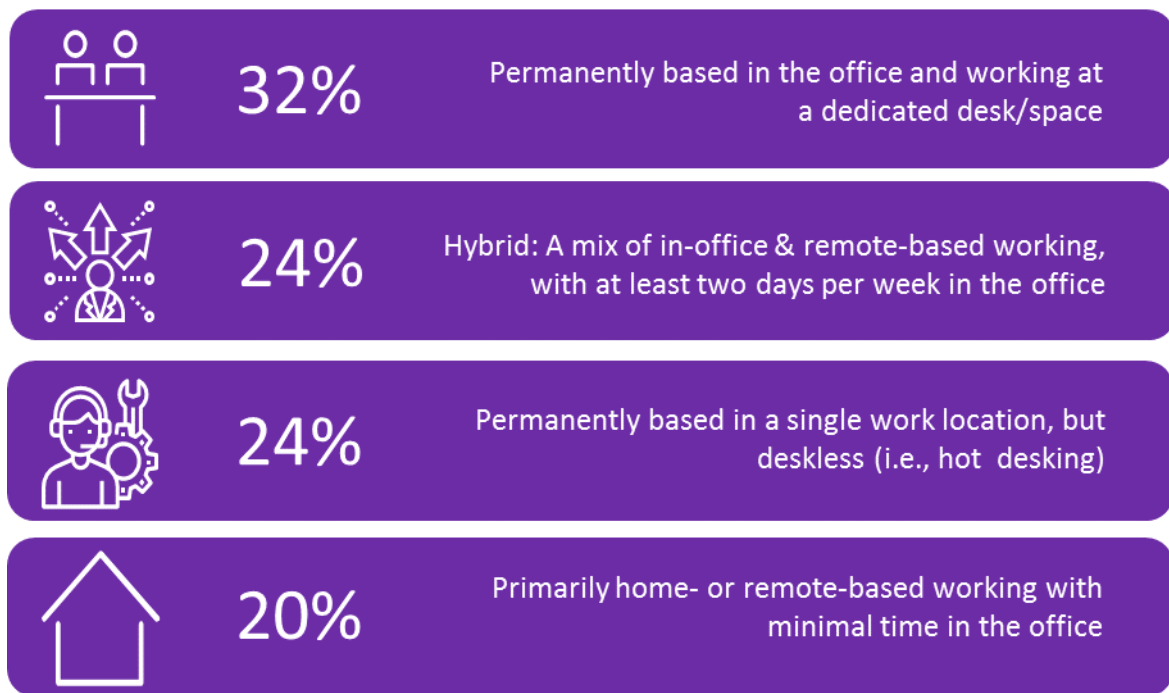
proposition and market are still quite nascent, so vendors should continue to strive to deliver market messaging and propositions that resonate with different business buyer personas.

Changing work styles presents new opportunities

Employees across the world continue to embrace new work styles, and approaches in response to the changes brought about by the pandemic. **Figure 2** shows data from Omdia’s *2022 IT Enterprise Insights: Key Findings and Content Guide*, and provides some insight into the different locations where work is now taking place from:

Figure 2: Just under half the workforce will work away from the office

Question: Post-pandemic, what percentage of your total workforce will align to the following work styles on a permanent basis?



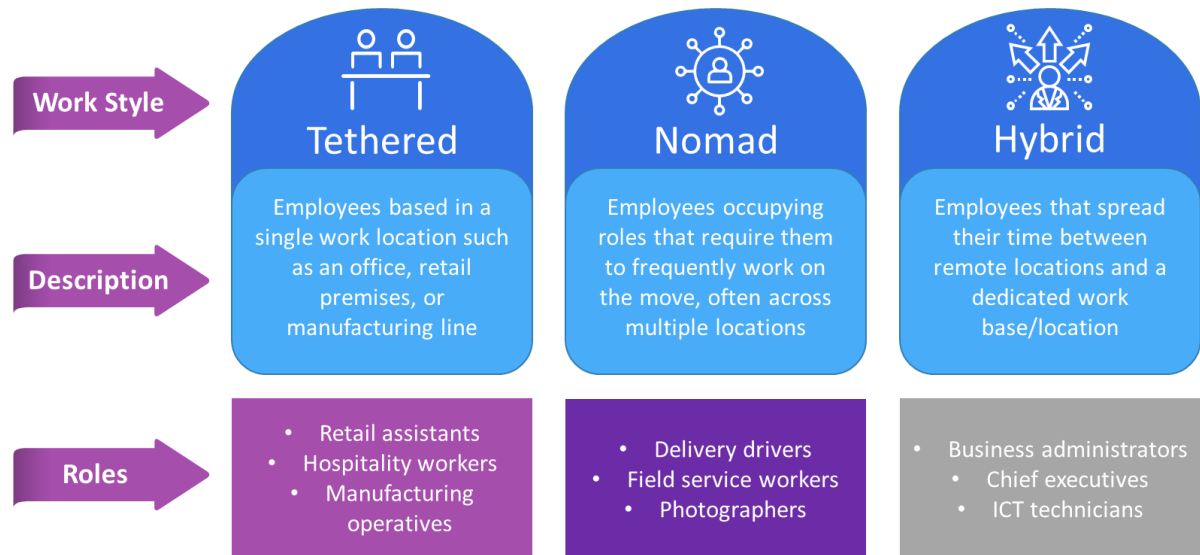
Source: Omdia, 2022 IT Enterprise Insights: Key Findings and Content Guide, n=4,757

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Source: Omdia

It is not only work locations that have changed for many; the very fabric of work is also changing. A key priority for organizations is to develop business infrastructure and operational practices to support a variety of different work styles, as shown in **Figure 3**:

Figure 3: Enabling different work styles is vital



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Source: Omdia

As businesses look to optimize infrastructure and operations around new workplace transformation opportunities, a fundamental re-think of the way work gets done is also taking place, and ESM solutions have an important role to play in helping businesses deliver against these opportunities. Notably, the improvement and automation of business processes and workflows to help make the tasks and duties employees undertake easier is a key value. Employee and business needs must be at the core of any service management initiative.

Figure 4: Vendor rankings in the Enterprise Service Management Universe

Vendor	Product(s) evaluated
Leaders	
Ivanti	Ivanti Neurons
BMC Software	BMC Helix
ServiceNow	ServiceNow San Diego
Challengers	
Freshservice	Freshservice
IBM	IBM Control Desk
ManageEngine	ServiceDesk Plus Cloud & on-premise
SysAid	SysAid

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Source: Omdia

Market leaders

Based on our criteria and analysis, BMC Software, Ivanti, and ServiceNow are identified as leaders in this year’s report. ServiceNow has huge mindshare and market traction within ITSM, but its strategy to raise appeal amongst non-IT buyers is also proving to be successful. ServiceNow’s growth over the past few years has been very impressive, and its platform of capabilities delivers value not only to IT teams looking to improve infrastructure and operations-related activities, but also to the broader business. Just over a year since its acquisition of both MobileIron and Cherwell, Ivanti has made excellent progress in strengthening its overall portfolio and in positioning itself as a vendor that supports businesses on the path to the Future of Work. BMC Software has continued to build on its strong ITSM and operations management heritage with new capabilities that have the potential to help the vendor grow adoption both in and away from the traditional IT use case.

Market challengers

Omdia has identified Freshservice, IBM, ManageEngine, and SysAid as challengers in the ESM space. In terms of enterprise relevance and the broader ESM feature set, Omdia recognizes that there is quite a large gap between the market challengers and market leaders. All market challengers in this report do offer a capable set of core-ITSM features, and many at a competitive price point that will appeal to the small and mid-market. Freshservice offers an ecosystem and marketplace that helps businesses integrate third-party applications and connects functions and people across an organization at a workflow level. Additionally, one of Freshservice’s key objectives is to deliver

capabilities that help improve the way that employees can self-serve and get the technical support they require.

IBM has a strong heritage of delivering solutions to support enterprise IT, and its Control Desk offering for service management has been a staple of its product portfolio for many years now. IBM's strategy is to deliver capabilities that help enterprises embrace ESM, better manage a multicloud environment, and support the delivery of IT and business services at high velocity. Core to IBM's ESM strategy is the integration of features offered by IBM Control Desk and Maximo. These combined capabilities support organizations in managing both digital and physical assets across IT and other lines of business.

In ServiceDesk Plus, ManageEngine offers a solution that helps IT, HR, and facilities management teams better support employees from across the business. ServiceDesk Plus has been developed with ITSM at its core, but ManageEngine (the IT management division of Zoho Corporation) has built upon this ITSM foundation with features that deliver value beyond just the IT department. ManageEngine's service management capabilities would certainly be a good fit for organizations already invested in the Zoho ecosystem, and for medium-sized organizations and some enterprises looking to mature ITSM approaches. Omdia found SysAid to have good mindshare in the ITSM space due to its modern marketing approach. Like its market challenger peers, SysAid delivers a good set of core-ITSM and self-service capabilities, with its solution being well-suited to the needs of small or medium-sized organizations especially.

Market outlook

ESM technologies continue to evolve from their IT service management foundation. New capabilities will further broaden the enterprise value offered by these solutions, better empowering IT departments but also further enabling other business functions, including HR and security, facilities, and customer service teams. The common adoption pattern is still one led by IT departments that, in time, drives the adoption of ESM capabilities to other functions within the business. Increasingly, however, ESM vendors are now reporting that other business functions are driving the agenda around ESM adoption. This trend will further accelerate as business functions such as HR and marketing play a more important and prominent role in decisions around enterprise technology selection.

Market opportunities

Further educate organizations on the broader value ESM solutions play in coordinating business-wide digital transformation

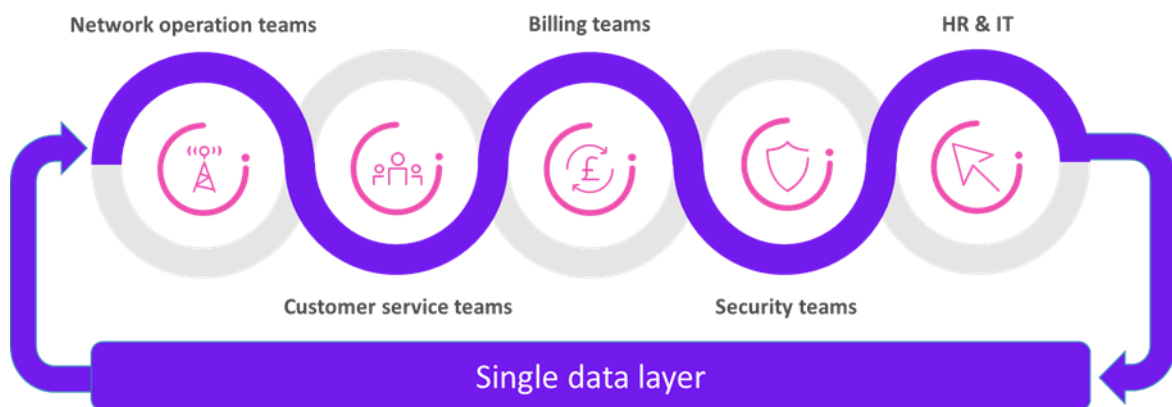
Vendors need to invest and develop capabilities that offer additional value to other business functions; furthermore, vendors should look to better communicate the range of digital outcomes that ESM solutions are now capable of supporting. Notable is how ESM capabilities can help better connect and integrate back-office and front-office operations at a process level. This delivers a lot of new value for organizations, including improving customer experience and outcomes, better aggregation and use of business data, and more efficient business operations. Being able to help businesses better aggregate, contextualize, and manage security incidents and alerts that are

generated via security tools is another important ESM opportunity. Interestingly, the need to better support employees—a core and traditional service management value—has also been prioritized by businesses that are keen to remove support frictions associated with remote and hybrid work.

Supporting the age of intelligence and automation

Artificial intelligence and automation capabilities are playing a vital role in improving the way that businesses operate and in how they will overcome future challenges associated with areas including security, employee productivity, sustainability, and in creating more hybrid workplaces. ESM tools will have a vital role to play in orchestrating and automating many of the processes and workflows that guide work in these areas and more. Specifically, empowering employees with capabilities that help them better self-serve, in addition to providing self-heal and remediation features that help make processes such as incident management more proactive, represent an opportunity for ESM vendors. Automation and digital workflow features, advanced employee support tools such as virtual assistants, low-code capabilities that help improve the speed and ease at which different technologies can be integrated, and the value and benefit of a common data layer that extends across multiple different business functions are all ESM attributes that have huge appeal to businesses looking to transform and modernize the way people work.

Figure 5: A single underlying data layer across different business units



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Source: Omdia

The upper mid-market opportunity

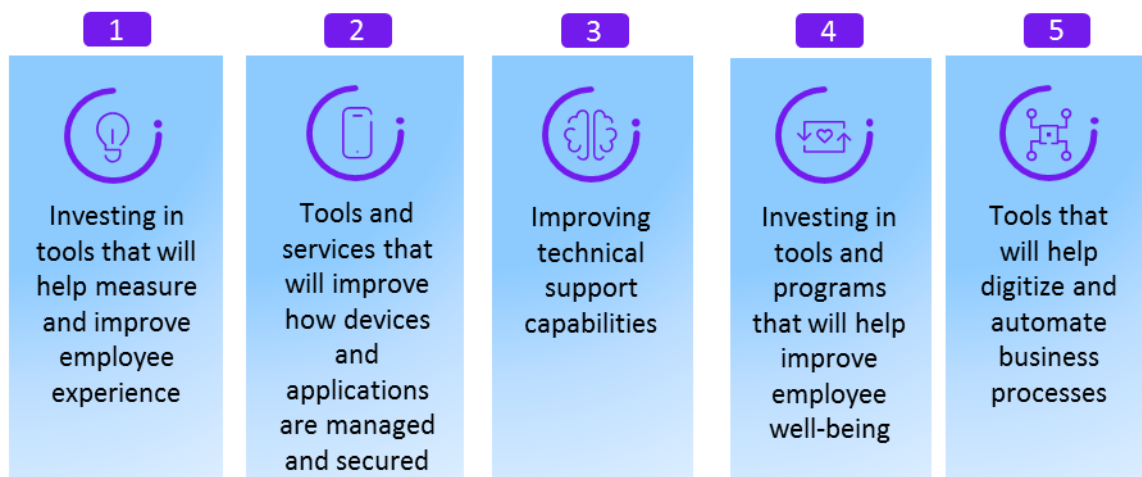
Whilst ServiceNow continues to experience strong success with large enterprise adoption, the competition within the mid- to upper-mid market has certainly intensified over recent years. Recent acquisitions and mergers in the space have resulted in commoditization of the ITSM/ESM market. The recent acquisition of Cherwell by Ivanti is notable, as Cherwell traditionally had a strong presence in the mid-market especially. Ivanti certainly has a strong play in this market segment as a result, but so do some of the challenging vendors featured in this report.

Helping businesses better understand and positively impact the employee experience

Developing a better understanding of how to measure and positively impact employee experience (EX) has become a business-wide initiative—one that various functions, including IT, HR, and facilities management, all have an important role to play in developing. Recent Omdia data, as shown in **Figure 6**, shows that improving and better measuring the EX has become an essential objective for organizations:

Figure 6: Employee experience has become a business imperative

Question: What are the top areas of investment your organization will make over the next 12 months to improve hybrid working?



Source: Omdia, 2022 IT Enterprise Insights: Key Findings and Content Guide, n=4,757 (showing top five responses only)

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Source: Omdia

Businesses are looking to invest in solutions that will help improve EX, and Omdia believes that service management solutions will have a vital role to play. ESM solutions will be important in helping businesses understand not only what the technology experience and employee journeys look like but also how human-centered and employee wellbeing elements could also be improved.

Better tie the value of ESM capabilities to security

Security has been a business priority for some time, but the recent mass shift to more flexible work styles has made it an even greater priority. Increasingly, some ESM vendors are beginning to offer capabilities that help businesses improve security practices and operations. By integrating the data and insights delivered via different cybersecurity solutions, ESM tools are well-positioned to deliver good context and a proactive mechanism that can help businesses improve how security issues and incidents are managed. There is an opportunity for service management vendors to become an important piece of the enterprise security puzzle.

Vertical-specific ESM offerings will be an important driver of growth

Industry-specific use-cases also represent an important area of evolution for service management solutions. The process automation and workflow digitization capabilities offered by ESM tools have value across a range of different industries and will be of huge support to businesses looking to accelerate efforts to digitally transform. The value of industry-specific ESM solutions is in how they are tailored specifically to the needs and objectives of businesses in different verticals. These solutions help businesses in different verticals more easily understand the value of these tools in a familiar context.

ESM: the fabric integrating the entire business

For many years, business and IT processes and workflows have been hindered by disconnected systems and working practices. One key benefit of ESM technologies and practices is how they help better connect organizations and the work that employees do at the process level. By better integrating processes, systems, and the data that is generated and stored across them, ESM tools help businesses improve employee experiences to rapidly identify and act on new innovative opportunities.

Core to the value of service management solutions over the next few years will be in how they enable businesses to connect different applications and data sources, and then allow organizations to develop workflows and derive insights from across that integrated ecosystem. Enterprises rely on a complex mix of different applications and business systems that are deployed and accessed in different ways. ESM helps bring disparate systems and the data housed within them closer together, enabling businesses to deliver a more comprehensive set of reports in addition to being able to build cross-functional workflows that draw upon this data. Additionally, the continued introduction of low/no-code development features makes building these integrations easy for all employees, regardless of their technical skills, thus allowing them to interact with important business data and create apps and workflows to make their work easier.

Together, telcos and ESM providers can “level up” digital workflows with 5G connectivity

It is important that enterprises begin to look at 5G not just as a new connectivity element, but as a digital building block and integrative component that will not only give rise to new services, but also enrich existing services and workflows. As has been shown by ServiceNow’s recent partnership with NTT, ESM solutions can be a valuable platform in helping businesses better integrate 5G into service delivery models. For example, an ESM platform could coordinate, orchestrate, and automate the tasks and workflows undertaken in enabling businesses to rapidly create private 5G networks or network slices tied to specific service level agreements. This is a future where connectivity and the network become configurable elements in the composable enterprise that businesses can easily leverage as they would any other service catalog item in developing digital workflows and experiences.

Market threats

ESM being perceived solely as an IT support capability

The ESM market still has work to do in growing awareness of the value these solutions can deliver beyond just the IT department. For many business stakeholders, these solutions are still perceived as

being of value to IT support use-cases only. IT-centric use-cases will remain important, but as discussed in this report, some ESM solutions now offer so much value beyond this IT heritage. As market leaders, it is important that the likes of BMC, Ivanti, and ServiceNow continue to amplify the promotion of their platforms beyond the confines of the IT department.

Licensing and product branding complexities leading to market confusion

As the value of ESM extends beyond just IT and into the wider business, vendors are tasked with adopting product marketing and licensing approaches that are not overly complex and that customers can associate with and deem valuable. This is especially important for vendors that deliver ESM capabilities via a set of different-but-integrated point solutions that may carry different brand names. A simplified licensing, value proposition, and product approach are certainly desirable.

Skillset shortage hindering ESM progress

Using service management practices and solutions to deliver business-wide value requires both technical and strategic business skills. As highlighted in the 2021 HDI *The State of Enterprise Service Management* report, filling dedicated service management roles is proving to be a challenge, with two out of five businesses advising that they have difficulties. Roles including service management process owners, service delivery managers, and business relationship managers are all proving difficult to fill for some organizations, yet all are important in advocating, directing, and furthering the use of service management principles and solutions within IT and in the wider business.

Vendor analysis

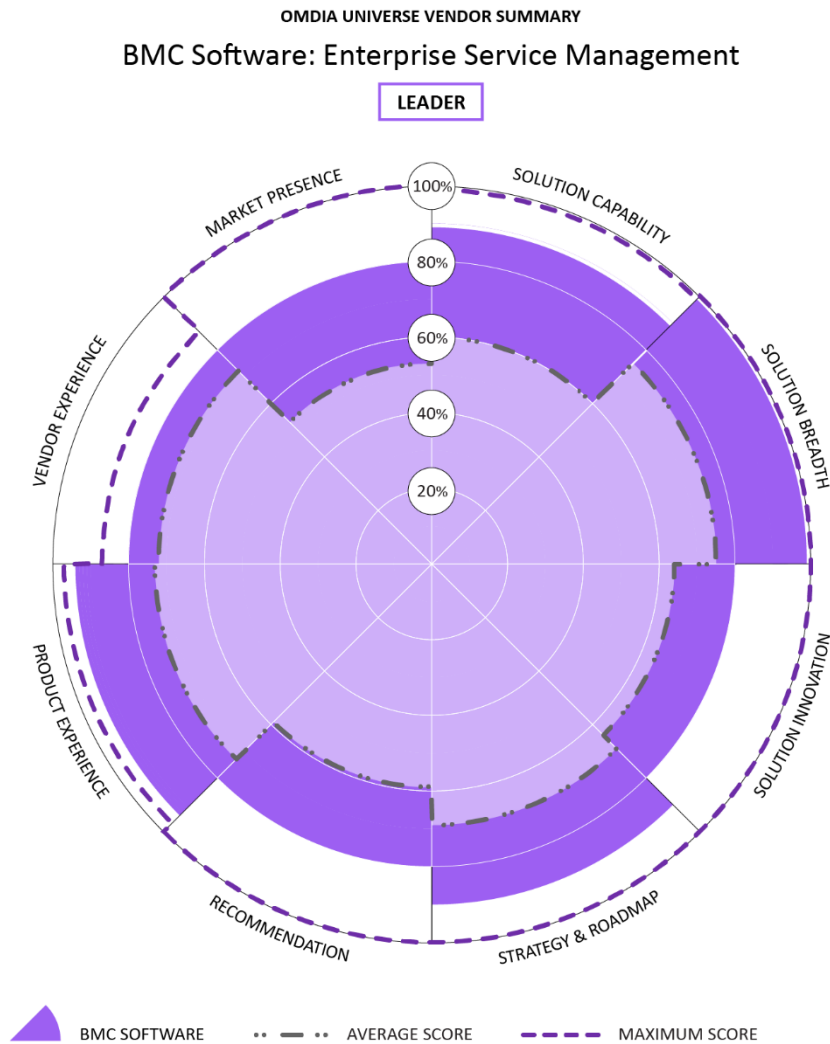
BMC Helix (Omdia recommendation: Leader)

BMC Helix should appear on the shortlist of medium-to-large sized organizations looking to improve/mature a service management approach and strategy

BMC has a strong ITSM heritage and market presence, notably with its Remedy solution that has long been a significant player in the ITSM space. Over the years, BMC has built a strong reputation for developing a quite diverse set of solutions that support organizations in strengthening enterprise IT infrastructure and operations, spanning areas including service management, cloud management, and workflow automation. Over recent years, BMC has made a conscious attempt to simplify its product set and value proposition to the market. The introduction of BMC Helix was a key part of this strategy. As with other vendors in this space, helping businesses realize value from AI capabilities has been core to BMC's service management strategy. BMC looks to support enterprises in becoming more autonomous through offering capabilities that align closely with the digital transformation priorities that businesses are making. The BMC Helix platform offers a comprehensive set of capabilities that span solutions, including ITSM, operations management, virtual agent, digital workplace, and business workflows.

BMC Helix is a new entry to the 2022 ESM Omdia Universe. BMC has been recognized as a leader in this Omdia Universe due to its diverse and strong range of ESM capabilities that are well-positioned to support businesses in digitizing and automating IT and business processes.

Figure 7: Omdia Universe ratings—BMC Software



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Source: Omdia

Strengths

A strong set of service and operations management capabilities: BMC delivers a strong set of ITSM and IT operations management (ITOM) capabilities that support enterprises in improving key service management activities, including incident management, service discovery, event management, and request fulfillment with its BMC Helix solution. BMC has reported increased enterprise demand in richly integrated ITSM & ITOM capabilities—something that has driven the vendor’s investment in these areas. This demand is being driven by a business need to improve integration between ITSM and ITOM activities through leveraging data and insights from both domains. The rich integration between these key ESM capabilities enables BMC Helix to deliver a range of compelling out-of-the-

box capabilities, including the management of machine-detected incidents, change automation & self-healing (across client system & servers), and security incident management.

BMC delivers an enterprise-grade virtual agent: BMC has significantly enhanced its BMC Helix Virtual Agent (formerly BMC Helix Chatbot) over the past 12 months to support better user experiences. Bundled with BMC Helix Knowledge Management, these enhancements include integrated NLP-based search capabilities and integration with BMC Helix Cloud Cost, which helps businesses control the costs associated with current and predicted cloud spend. Via the virtual agent, businesses can request budget recommendations to help optimize service costs. The BMC Helix Virtual Agent also uses real-time translation to localize chatbot conversations in different languages—including those that may not be supported by BMC—through integration with translation providers such as Google Cloud Translation Services and/or Microsoft Translator API. The BMC Helix Virtual Agent also supports WhatsApp as a chatbot channel and delivers an out-of-the-box dashboard and usage metrics that help customers determine the overall performance, effectiveness, and return on investment (ROI) of the BMC Helix Virtual Agent.

Supports a variety of different workflow development approaches: The broad business applicability of core service management capabilities means that ESM solutions must support a variety of development approaches, including pro-code and low/no-code that enable customers to develop new workflows and functional extensions. BMC Helix's support of no-code enables ITSM admins to distribute responsibility for configuration to the respective teams who are ultimately responsible for delivering IT services in their domain area. For more advanced use cases, a low-code approach is also delivered that supports things such as advanced querying and policy development. BMC Helix is also flexible in offering a coding approach to development—an important capability for developers and advanced use cases. To reduce the potential negative impact of customizations, BMC Helix can auto-reconcile any modifications made to pre-built UIs and workflows. This is “Overlay” technology that BMC has patented.

Limitations

BMC's legacy service management propositions have resulted in some market confusion: BMC has invested significant time and resources in modernizing its service management approach around the Helix platform proposition—something that is a big step in the right direction. In getting to this point, however, BMC has offered a quite confusing set of service management solutions and capabilities to market—something that has impacted market perception of BMC. Remedy remains a notable brand, and RemedyForce and BMC Footprints are other solutions that have awareness in the market. These different brands have led to some confusion around what exactly BMC's pillar service management proposition is. BMC must continue to move away from this multi-solution and multi-brand approach, and the evolution to the Helix platform is a positive step here. BMC must now focus and invest in building that brand and educating the market on this platform proposition.

Lacks some of the native out-of-the-box business solutions offered by some competitors: Beyond the core ITSM and ITOM capabilities, BMC does offer out-of-the-box solutions for HR service management, facilities management, and finance service management. However, BMC currently lacks the native, governance risk and compliance (currently offered by way of a co-sell partnership with MetricStream) and customer service management (CSM) capabilities offered by some competitors. BMC does advise that native CSM and Field Service Management capabilities are on its roadmap. BMC advises that it does provide customers with robust integration capabilities with BMC

Helix iPaaS and/or REST APIs so they can seamlessly fuse and develop custom configurable processes and workflows to get the required solution.

Recognition beyond just the IT department: BMC's ESM strategy and its recent product evolutions demonstrate that the vendor has real intent for Helix to be viewed as a true enterprise platform, and not just an IT-centric one. Currently, BMC is well known in the realms of IT, but awareness beyond the IT department can be improved. Further raising awareness of BMC's ESM capabilities beyond just the IT department will be important for the vendor going forward.

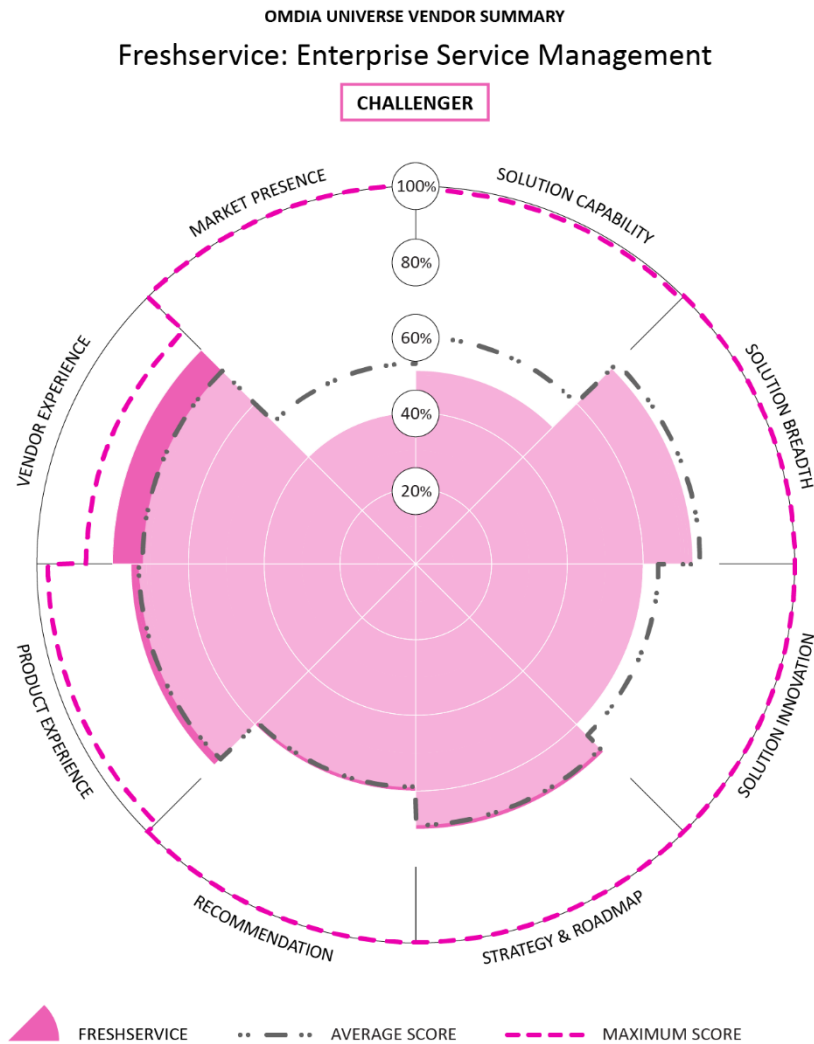
Freshservice (Omdia recommendation: Challenger)

Freshservice should appear on the shortlist of medium-sized enterprises looking for IT service management capabilities to help accelerate digital business initiatives

Freshservice delivers a strong set of core-ITSM capabilities that are complemented by features aimed at supporting HR, procurement, and facilities management tasks and activities. As with most ESM solutions, a core value and key market opportunity that Freshservice is looking to deliver against is in becoming a valuable partner for organizations looking to deliver against digital initiatives. Through its Neo platform, Freshservice offers an ecosystem and a marketplace that helps businesses integrate third-party applications into an instance, and connects functions and people across an organization at a workflow level. Additionally, delivering capabilities that help improve the way that employees can self-serve and get the technical support they need is a key objective.

Freshservice is predominantly adopted by North America- and Europe-based organizations with fewer than 1,000 employees. The company reports strong revenue growth of its ESM solution over the last year: a testament to the growing appeal of ESM products in general, but also to how new capabilities introduced by Freshservice are resonating with customers, especially IT buyers. Freshservice also reports that adoption of its ESM solution amongst larger organizations (1–5,000 employees) is also growing. Freshservice is a SaaS-only solution that has traditionally taken a direct approach to market, but the vendor is now building a stronger partner ecosystem to complement its direct route to market.

Figure 8: Omdia Universe ratings—Freshservice



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Source: Omdia

Strengths

Freshservice’s virtual agent and chatbot capabilities can help businesses modernize employee support: Virtual agents are becoming an increasingly important ESM capability, especially as these solutions evolve in delivering broader support scenarios to employees across multiple business departments. The models used by Freshservice’s virtual agent are trained across its customers’ accounts, based predominantly around the ITSM domain. Freshservice’s chatbots can understand intent and differentiate between whether an incoming message is a service request, an incident, or a question that can be answered instantly—it can also route incidents and request to appropriate groups when escalation is required. The virtual agent is accessible via solutions such as Microsoft Teams and Slack, allowing employees to get IT to help directly in the collaboration tools they frequently use with no need to navigate to another portal. The virtual agent also extends to analytics

via the “Ask Freddy” feature, which uses natural language processing (NLP) algorithms to generate reports when users pose a question. For example, a user could ask, “What is the average resolution time of tickets by agents?” The virtual agent will then automatically generate a report based on the question.

Freshservice offers a compelling set of advanced service management capabilities, including native mobile capabilities and SaaS app management: As employees increasingly work in a more mobile and remote fashion, it is important that they have the tools they need to get support quickly and easily when needed. Mobile support features have become very important over recent years, and providing native mobile applications and capabilities is the most effective way to deliver compelling mobile support experiences. Freshservice offers a native mobile app for Android and iOS built for both admins delivering support services and those employees needing support. Via the native app, admins can manage incidents, service requests, and changes, in addition to being able to manage assets via bar code scanning and receiving push notifications. For employees looking to interact with support functions, the app enables them to do things such as browse the service catalog, submit a service request or incident, search and view knowledge solutions, manage approvals, and receive push notifications. Freshservice also offers SaaS application management features that provide IT with better visibility and control over the SaaS apps in use within their environment.

Well-placed to capitalize on the mid-market IT service management opportunity: For Freshservice, raising its broader enterprise appeal will be key to future growth and adoption amongst medium-sized enterprises. Freshservice will appeal to this market as it is competitively priced, lacks the complexities of some larger, more feature-rich solutions, and delivers a quick ROI.

Limitations

ITOM capabilities could be improved: ITOM capabilities are important as they help businesses build an accurate view of the services they are delivering, the health of these services, and the elements and configuration items that these services are built upon. Freshservice does not currently offer ITOM capabilities that are comparable to some of its competitors in the ESM market. However, the vendor has advised that developing these capabilities is an item on its immediate roadmap.

Freshservice should look to further develop its analytics and benchmarking capabilities: Performance analytics capabilities help businesses not only understand where potential business and IT improvements can be made but also provide steering and insights around how any improvements could be made and the potential value in making them. Freshservice should consider introducing capabilities that provide businesses not only with historical analytical data but also insights into how and where businesses need to improve in achieving defined objectives. Additionally, offering benchmarking capabilities that enable businesses to compare performance metrics to the norms of industry peers would be useful.

Strengthen capabilities beyond the ITSM core: Freshservice offers features to support broader business use-cases—including with HR and procurement—by way of templates that are built on the native ITSM capabilities offered by the solution. However, competitive offerings deliver more advanced capabilities in these areas at present. Freshservice should look to further develop its features beyond the core ITSM use-cases, building native capabilities that meet the specific needs of business functions such as HR and facilities management.

As Freshservice did not formally take part in this 2022 ESM Universe revision, Omdia updated the vendor's entry based on desk research, in addition to data and insights gathered as part of the 2021 report development process.

IBM (Omdia recommendation: Challenger)

IBM should appear on the shortlist of organizations looking to evolve asset management approaches

Control Desk for service management has been a staple of IBM's product portfolio for many years now. IBM commonly works with organizations in industries that have a need to manage many different assets. This is largely because of how IBM's Control Desk and Maximo capabilities enable the holistic management of physical and digital enterprise assets. IBM Control Desk and IBM Maximo share a common platform, user experience, and data model. Common use cases of this enterprise asset management approach include airport systems, railway network control systems, energy transmission grid management, telecommunications networks, and logistics systems. Increasingly, businesses are connecting enterprise assets to their underlying IT infrastructure, so having a more unified means of managing and gaining visibility into this topology can deliver cost-saving and efficiency benefits.

IBM's future strategy is to deliver against its ESM vision in delivering capabilities that help businesses better manage and digitize processes and workflows and to better support the delivery of IT and business services at high velocity. IBM will continue to integrate its Control Desk and work management features to capitalize on its asset management strength and in driving these capabilities across different business functions, not just IT.

IBM Control Desk has good traction with businesses in North America and Europe, with adoption amongst larger organizations (5,000+ employees) being strong. Whilst IBM Control Desk is sold directly to customers, the solution is predominantly sold through partnerships with providers. IBM Control Desk is licensed perpetually for on-prem and SaaS deployments.

Figure 9: Omdia Universe ratings—IBM



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Source: Omdia

Strengths

Strong cognitive service management capabilities: IBM’s AI capabilities can be leveraged in various ways by IBM Control Desk, helping improve the user experience for IT admins and end-users alike. IBM Watson Virtual Agent makes it possible to harvest information from internal and external knowledge sources, thus making content and recommendations to help processes such as incident management and request fulfillment more efficient. Watson Virtual Agent is a SaaS-deployed offering optimized for use across both web and mobile. IBM also developed integrations with Watson AIOps, which helps support teams identify patterns and predict upcoming incidents, and to also pro-actively open tickets and automatically undertake defined corrective actions.

Enterprise asset management: IBM Control Desk that sits under the Maximo Application Suite offers an integrated set of IT and Enterprise Asset Management capabilities. These capabilities enable IBM customers to populate both IT and wider business (digital and physical) asset directories through integration with discovery tools. This provides businesses with unified visibility across the digital and physical asset estate. The integration between the insights IBM Control Desk can deliver on the IT side with the visibility Maximo provides through business assets is a compelling ESM capability. In late 2020, IBM also acquired Instana, a solution that, when integrated, will further improve IBM's native application discovery and observability capabilities across IT and LOB assets. This unified asset management capability can deliver a range of ESM-related benefits, such as enabling organizations to manage SLAs across IT+LOB business systems.

Low/no-code workflow development: IBM offers a low/no-code workflow development capability that supports the rapid configuration and development of applications. IBM's Work Center Application Designer solutions also enable customers to rapidly configure role-based user interfaces based on business need.

Limitations

Solutions for non-IT use-cases: Whilst IBM Control Desk can be configured to support departments such as IT and HR, the solution does not currently offer native solutions that are developed specifically for these use-cases. Instead, IBM Services offer a content package that allows for HR and other business workflows to be managed via Control Desk. Enhancing capabilities here, particularly around the HR and facilities management use-cases, is something IBM should explore.

Awareness of service management proposition: Omdia finds that IBM does not have the same mindshare or ESM market awareness amongst businesses when compared to some competitive offerings. IBM should look to better market its service management capabilities, especially given the anticipated market growth in this area as the appeal of these solutions continues to grow within business functions beyond just the IT department.

Digital employee experience capabilities: As work has become more "digital-first" over office and physical, businesses are looking for new ways to better measure and positively impact employee experiences, especially with technology. Some service management vendors are beginning to offer digital employee experience management capabilities in response. This is an area IBM should explore in its future roadmap.

Ivanti (Omdia recommendation: Leader)

Ivanti's combination of strong service management, security, and endpoint management capabilities make it a solution worth shortlisting by enterprises looking to deliver against digital workplace initiatives

Ivanti Neurons is a feature-rich service management and automation platform that offers a diverse set of capabilities that support businesses in securing and managing business and IT services. Ivanti has made significant investments over recent years in developing its Neurons platform into a market leader.

Ivanti is primarily focused on mid-maturity organizations that have between 1,000 to 100,000 employees. Currently, Ivanti is experiencing strong adoption by organizations with between 5,000 and 20,000 employees, but the vendor is also seeing success with larger enterprise clients seeking an alternative service management solution that differentiates between employee experience and endpoint management capabilities. Ivanti's vision is to support customers in evolving traditional reactive support models and approaches to those that are more autonomous, driven by automation and self-healing bots and virtual assistants. Ivanti also recognizes the important role that self-healing and digital employee experience capabilities will play in developing support structures that are compatible with more modern, mobile-centric, and hybrid work styles.

Ivanti's capability enhancements over recent years have been focused on three key areas: Unified Endpoint Management (UEM), Security Management, and Enterprise Service Management (ESM). The Ivanti Neurons platform brings together these capabilities in delivering a solution that supports businesses in managing, securing, digitizing, and automating the processes and workflows that guide modern work. To increase focus on customer outcomes and success, Ivanti has adopted a focused channel partner model where partners are paid a fixed commission for both sales and technical support. This complements Ivanti's direct sales model.

Ivanti has a global presence, with strong adoption by organizations in Europe and North America. Ivanti works with organizations across all industry verticals but has notable representation across government, higher education, supply chain, telco, and healthcare verticals. In meeting the different needs of customers in certain industries, Ivanti has dedicated telecoms, supply chain, and federal personnel and expertise. Ivanti has a good balance of both on-premises and SaaS deployments, and the vendor offers cloud or on-premises deployments from a multi-tenant platform, allowing customers to transition between cloud or on-premises in line with requirements.

Figure 10: Omdia Universe ratings—Ivanti



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Source: Omdia

Strengths

Ivanti delivers a diverse and richly integrated set of capabilities that support more hybrid and mobile-centric ways of working: The broad set of capabilities offered by Ivanti include ITSM, IT asset management, ITOM, security management, DevOps, and UEM. Commonly, organizations need to work with different providers in leveraging some, or all, of these capabilities. Being able to leverage them all through one vendor can help reduce costs and standardize adoption practices. Additionally, the rich integration between these capabilities that Ivanti offers delivers new value, for example, in how endpoint management data and insights can be used to improve services and the employee experience overall.

Proactive service management and self-healing capabilities: As work continues to transform and employees increasingly work in more hybrid and digital-first ways, the means and methods by which they are supported also need to evolve. Ivanti delivers an omnichannel support experience that allows employees to self-support in addition to getting help via portals including Microsoft Teams, a native mobile app, automated voice, and a virtual agent. Ivanti also offers self-healing capabilities powered by deep learning. Using telemetry data from things such as endpoints and applications, this self-healing capability can pre-empt and resolve issues before they have a direct impact on employees or a service in addition to helping deliver more contextualized and personalized experiences for remote workers. This type of capability is commonly offered by specialist digital experience monitoring and management solutions, so having it natively available as part of the Neurons platform is a compelling differentiator.

Low/no-code capabilities make the platform extensible: Ivanti supports workflow design and automation via a no-code drag-and-drop interface. Providing customers with the ability to customize without a need for coding or professional services resources can help businesses quickly deliver new workflow and operational efficiencies.

Limitations

The broader enterprise proposition is not yet as compelling as some competitor offerings: It is still quite early days for Ivanti in broadening the capabilities and adoption of its platform beyond just the IT department and into other business areas, including HR, facilities, finance, and customer services. Ivanti's acquisition of Cherwell, coupled with its own ESM investments and developments, is certainly helping the vendor raise appeal and adoption, but some competitive offerings are further down this path.

Lack of pre-developed industry-specific solutions: Service management principles and practices can deliver value to businesses across a range of different industries and use-cases. A challenge in broadening adoption beyond the traditional IT-centric use-cases has been in raising awareness of the broader value delivered. Unlike some of its competitors, Ivanti does not currently offer industry-specific solutions that are tailored to the needs of specific verticals out-of-the-box. However, Ivanti does have a specific healthcare-related capability via Ivanti Neurons for Healthcare, which provides detailed medical device discovery and vulnerability information that is available in the Ivanti Neurons for ITSM CMDB.

Improve market presence and awareness of broader value proposition: Since Ivanti closed the acquisitions of MobileIron and Cherwell and integrated those capabilities, building awareness of its more comprehensive offering, in addition to how it differentiates from some of the more enterprise-established vendors in this space, will be important if Ivanti is to further grow its market awareness and impact.

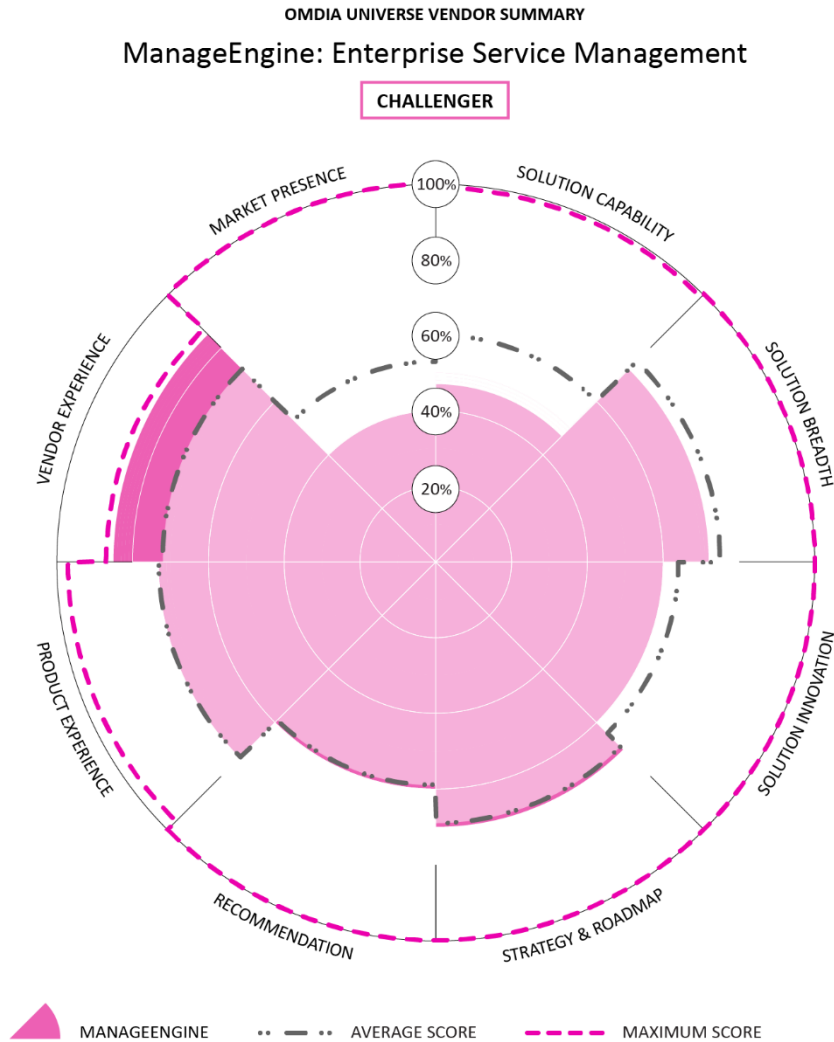
ManageEngine (Omdia recommendation: Challenger)

ServiceDesk Plus should appear on the shortlist of SMBs and existing customers of other ManageEngine solutions

ServiceDesk Plus from ManageEngine (the IT management arm of Zoho) has been developed to cater for the service management needs of small to medium-sized organizations. Since the company's inception in 2005, ManageEngine has grown to serve over 100,000 customers across various industries worldwide. ServiceDesk Plus can be deployed via cloud and on-premises versions, with most deployments currently being on-premises. ServiceDesk Plus has been developed with IT and the support use case in mind, but a range of integrations with other ManageEngine native IT management solutions are possible in taking the value beyond just the traditional IT support use case. Native integrations include a communication and collaboration suite, a digital workplace suite, Active Directory management, UEM, event management, and operations management. As opposed to providing pre-developed solutions created for service teams such as HR and facilities management, ServiceDesk Plus' ESM module enables customers to create service desk instances for different teams. ManageEngine is making investments in developing ServiceDesk Plus into a platform upon which its other IT management solutions can be integrated. The platform approach will also enable experienced and citizen developers to build extensions and custom applications that can then be published to the Zoho Marketplace.

ManageEngine's ServiceDesk Plus is available in Standard, Professional, and Enterprise editions. ManageEngine has offices across the world and a direct sales presence in the US, India, Japan, China, Singapore, and the Netherlands. North America is ManageEngine's biggest region in terms of adoption, followed by Europe. Pre- and post-sales support services are coordinated by a single point of contact, and ManageEngine also offers a customer support program that helps businesses maximize return on investment through a health check, user sentiment, and ongoing improvement activities.

Figure 11: Omdia Universe ratings—ManageEngine



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Source: Omdia

Strengths

A good set of core service management features are complimented by more advanced capabilities, including UEM: Supporting and managing a more hybrid and mobile workforce requires organizations to more closely integrate service management tools and practices with endpoint management capabilities. ManageEngine offers a broad portfolio of capabilities in addition to its service management product. Included as part of this integrated set of ManageEngine solutions is Desktop Central for UEM, which supports customers in managing and supporting a more mobile workforce. The analytics capabilities that can extend across the different service management capabilities offered are also good, empowering customers with a means to easily derive insights across an estate of different solutions.

Create custom functions and workflows with no-code Deluge capability: Service management tool extensibility is important due to the diverse ways in which the solutions can deliver value to different parts of the business. Low/no-code capabilities have emerged to democratize development activities to complement the more traditional development practices and tools that require skilled resources. With Deluge, ManageEngine offers its own low/no-code capability. Deluge is a serverless scripting language built into ServiceDesk Plus that enables users to create custom actions, workflows, and integrations directly in the application. Deluge extensions and developments are secure and in a closed environment.

Zia AI-powered virtual assistant: Zia is Zoho's AI virtual assistant that offers a range of compelling features to support IT admins and end-users. Zia is used by ServiceDesk Plus admins to improve employee support and by business users to assist them in logging requests and incidents, updating tasks, approvals, and in generating reports. Employees can interact with Zia through chat across both desktop and mobile, and in a conversational fashion through Zia over smartphone where users can talk to Zia in carrying out tasks. Zia also powers ManageEngine's analytics capabilities enabling users to create reports via voice commands in natural language and bypassing the need to write complex queries or logic.

Limitations

ServiceDesk Plus does not offer the broad range of ESM capabilities delivered by some competitive solutions: Unlike some competitive solutions, ServiceDesk Plus does not currently offer dedicated HR and facilities management capabilities. Instead, these functions are supported by dedicated workspaces and templates that can be created. A customer can select these templates when creating a ServiceDesk Plus instance, which essentially tailors that instance with terminology and case management capabilities geared towards HR and facilities management teams. Traditional service desk and IT use-cases are still very much at the core of ServiceDesk Plus.

Adoption and experience amongst large enterprise deployments: Currently, ServiceDesk Plus is largely adopted by and aimed at small to medium-sized organizations. This is by design, as the SMB market segment is one ManageEngine actively targets. However, this segment has also become very competitive over recent years, so ManageEngine must look to continue to innovate around broader business service management opportunities.

IT operations and security management capabilities are not as strong as some competitive offerings: ManageEngine does offer some configuration management and application management capabilities, but these are largely delivered via integrations with other tools, including Site24x7, Application Manager Plus, and OpManager. ServiceDesk Plus's range of native operations management and security management capabilities does fall behind some competitive solutions that have dedicated offerings in these areas in delivering capabilities, including advanced discovery and security case management capabilities.

ServiceNow (Omdia recommendation: Leader)

ServiceNow should appear on the shortlist of organizations looking to better connect and integrate systems, processes, and people across the entire enterprise

Over recent years, ServiceNow has evolved into a feature-rich and versatile enterprise platform that helps businesses integrate, digitize, and automate workflows to improve employee and customer experiences. Whilst early adoption of ServiceNow was predominantly by IT teams looking to automate common request and fulfillment processes, the platform is now best thought of as an engine driving digital transformation for many businesses, with workflow automation at its core. The Now Platform helps organizations integrate disparate data sources and systems of record that are foundational elements of the digital enterprise. This integration delivers a single data layer across different business areas, including IT, HR, customer services, facilities management, sales, and finance functions. Businesses can exploit this data foundation in many ways, including automating cross-functional processes and workflows by democratizing data to provide operational insights that help guide more efficient working methods and employee experiences. This integrated data layer is an essential differentiator of the broader Now Platform and ServiceNow value proposition.

ServiceNow has a cross-industry and global focus, with adoption and market recognition of the Now Platform being very strong. The ServiceNow solution is developed on a single technology platform. When ServiceNow acquires new capabilities, it invests the resources and time to develop any newly acquired capabilities into its platform. ServiceNow offers a very capable set of features that appeals to a variety of business units. Given the broad scope of ServiceNow's capabilities, the vendor increasingly competes not only with other service management vendors but also with a range of providers across different enterprise technology categories.

Figure 12: Omdia Universe ratings—ServiceNow



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Source: Omdia

Strengths

A feature-rich enterprise platform capable of supporting businesses in modernizing and transforming work: Workflows and processes guide the way that tasks and activities get done in an organization. They are a business and operational constant, so making them more efficient, digital, and automated helps businesses transform the very fabric of work. ServiceNow has evolved into a platform that helps businesses improve processes and workflows in an end-to-end fashion across the entire business. ServiceNow’s innovations have helped make service management capabilities an important digital transformation element. It is also important to note that this digitization and workflow opportunity is not only limited to human tasks—numerous edge automation applications can also be improved. Examples include providing and managing machine vision for inspection and surveillance, automated guided vehicles, and enabling employees (particularly frontline workers)

with AR/VR devices. These scenarios center around the workflows that integrate devices (at the edge), the network, employees, and customers. The Now platform will help businesses orchestrate services built on these different assets, enable enterprises to monitor and trigger events associated with the digital workplace, and automate the provision and activation of services and devices end-to-end.

Strong market presence, recognition, and track record of innovation: Global adoption of ServiceNow continues to grow, both within and away from the traditional IT buying center. ServiceNow has fully committed to the ESM value proposition and invested heavily in developing its platform to better serve broader business functions and use-cases, including those within HR, legal, and contact centers. ServiceNow has also demonstrated an excellent track record of frequent innovations that not only further develop its own product, but often help evolve the service management market.

Mature industry solutions and focus: Tailoring technology to the specific needs of businesses in different industries can help better communicate the value of any solutions and accelerate time-to-value for the customer. To better cater to customers across different verticals, ServiceNow has developed solutions aimed at the specific needs and use-cases of businesses in different industries, including telco and financial services verticals. ServiceNow's Telco solution has been particularly successful, with numerous large global CSPs leveraging the solution to improve their internal service management practices whilst also using the platform to improve the services delivered to their own customers.

Limitations

Licensing costs and flexibility: Some ServiceNow customers report concerns with licensing costs and complexity. Customer feedback does suggest that ServiceNow adoption can be expensive, especially when compared to other service management tools. It is therefore important that customers work with ServiceNow to get the maximum value possible from the solution, especially given the vast capability offered by the product. Whilst return on investment and the impact in terms of value are reported as high given the broad capability, some customer feedback suggests that a more flexible licensing approach would further improve customer sentiment.

Improve data migration and integration: Some customers report that the processes and mechanisms in place to support data migration from existing business systems into ServiceNow could be made easier. Additionally, some customers suggest that developing integrations with other tools could also be made simpler, whilst also acknowledging that ServiceNow IntegrationHub is a positive step in the right direction here.

Market awareness beyond the traditional IT use case: As ServiceNow has scaled and expanded its capabilities into new areas, its ecosystem of different products has become vast. Given ServiceNow's broad value, multiple use-cases, and heritage as an ITSM vendor, ServiceNow must continue to amplify the promotion of its Now platform beyond the confines of the IT department. ServiceNow recognizes that its multi-product approach can be a lot for customers to consume at once, so the vendor continues to make efforts to organize its offerings into market segments, personas, and use cases to help buyers select what's most important to them.

SysAid (Omdia recommendation: Challenger)

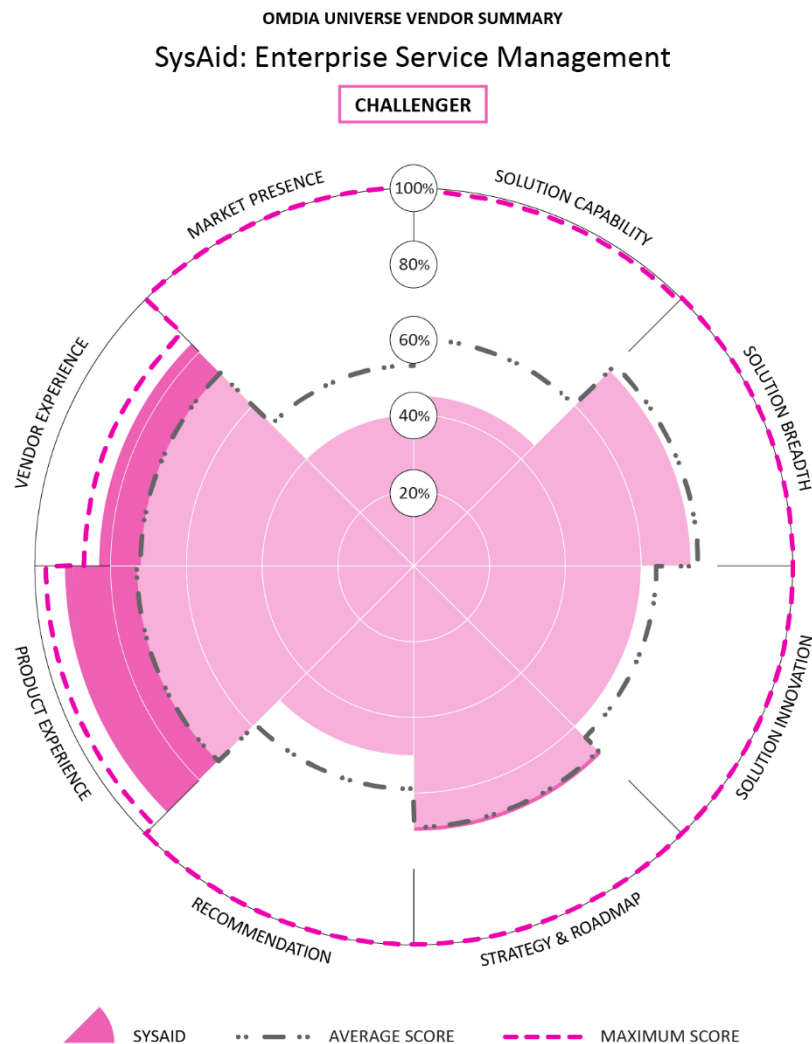
SysAid should be on the shortlist of medium-sized organizations looking for a solution that provides a good set of core service management capabilities

SysAid offers a good set of core-ITSM capabilities that have been developed with the service desk and IT teams in mind. Over the past 18 months or so, SysAid has also invested in its approach and offering to further scale its capabilities and value proposition beyond the core IT use case. The company also offers a solution developed specifically for managed service providers (MSPs). SysAid also offers good orchestration and asset management capabilities, in addition to a marketplace of add-ons and third-party integrations that allow customers to further extend the capabilities of the solution.

SysAid targets global mid-market organizations across all industries with its solution. SysAid goes to market directly in North America and Europe and via partners in other regions. The main industries it currently serves are healthcare, FinServ, government, manufacturing, and education. The vendor's product strategy is built on a need to make work easier and more efficient for employees and those responsible for delivering and supporting business services.

SysAid does not have the same market presence, mindshare, or enterprise adoption as other vendors in the space, but it delivers a solid foundation of ITSM capabilities that the vendor continues to enhance with functionality that enables business units beyond IT, notably HR teams.

Figure 13: Omdia Universe ratings—SysAid



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Source: Omdia

Strengths

Flexible deployment options and simple licensing model: SysAid can be deployed either on-premises, via SaaS multi-tenant, or via private cloud. Customers can easily switch between the different deployment models should their requirements change. SysAid also boasts a simple and low-cost pricing model that is based on an annual subscription for both cloud and on-premises deployments of its solution. SysAid’s ITSM solution is priced per admin and is calculated according to named users, not concurrent users.

Good customer satisfaction and support: Feedback on SysAid’s customer service and support is very strong and complimentary. SysAid has a dedicated customer success team that works with customers regularly in ensuring maximum adoption value is being achieved. This program includes

regular customer check-ins that involve a review of customer goals and defining improvement opportunities. Additionally, due to its large mid-market customer base, SysAid regularly advises customers on important KPIs based on customer trends and peer benchmarks. SysAid also offers its new customers implementation services that follow Information Technology Infrastructure Library (ITIL) principles and virtual training, both for IT professionals and for stakeholders across the customer organization. Foresight is a new ITSM maturity assessment tool SysAid has introduced that is used by account executives and customer success managers to assess progress and to create a customer roadmap to enhance ITSM maturity.

A strong set of employee support and self-service capabilities: SysAid provides single-click access to self-service resources via single sign-on (SSO). The self-service and support features allow employees to attach screenshots of issues they may be experiencing on endpoints (PC, mobile) to a ticket, in addition to being able to record a short video clip of any issue they may be experiencing. SysAid also offers a remote-control solution powered by TeamViewer that facilitates a secure and seamless remote support experience from within a ticket.

Limitations

Market impact and recognition: SysAid does not have the market share or recognition of some competitors in the space. SysAid's primary appeal and adoption is more with small to medium-sized organizations as opposed to large enterprises, but this is a market segment that is also very competitive. SysAid has a modern and appealing market strategy, so the vendor must continue to invest here in improving awareness of its offering and in strengthening its profile with potential buyers. Further investment in new capabilities that offer value beyond the traditional IT use-cases will also be important for SysAid, especially as buyers look towards these solutions to help in centralizing how services from across different business functions are managed and automated.

Capabilities are not as strong as some competitive offerings: SysAid offers a strong set of core ITSM capabilities, but the solution lacks some of the more advanced features offered by other solutions on the market. IT operations management, security management, and customer service management capabilities can be delivered through integrations, with native capabilities falling behind some other solutions in the ESM space.

Partner ecosystem: Service provider partners, including telcos and managed service providers, are an important route to market. Telcos, in particular, are increasingly leveraging service management solutions to improve their B2B operations. SysAid should look to further strengthen its partner ecosystem by enhancing its go-to-market and integrated capabilities.

Methodology

Omdia Universe

- Omdia creates a matrix of capabilities, attributes, and features that it considers to be important now and in the next 12–18 months for the market.
- Analysts invite vendors to share how insights around how their solutions align with the capabilities being assessed, supplementing these vendor insights with other information obtained from industry events and via solution resources.
- Analysts derive insights on the customer experience with each solution via reviews and ratings on TrustRadius, in addition to those sourced directly from enterprises using the respective solutions.

Omdia ratings

Market Leader: This category represents the leading solutions that Omdia believes are worthy of a place on most technology selection shortlists. The vendor has established a commanding market position with a product that is widely accepted as best-of-breed.

Market Challenger: The vendors in this category have a solid market positioning and are selling and marketing the product well. The products offer competitive functionality and a good price-performance proposition and should be considered as part of the technology selection.

Market Prospect: The solutions in this category provide the core functionality needed but either lack some advanced features or suffer from low market impact and/or recognition.

The scoring for the Universe is performed by independent analysts against a common maturity model, and the average score for each subcategory and dimension is calculated. The overall position is based on the weighted average score where each subcategory in a dimension is allocated a significance weighting based on the analyst's assessment of its relative significance in the selection criteria.

Inclusion criteria

In this ESM Universe, we were keen to explore capabilities beyond just the core and foundation of ITSM. Under the recognition that ITSM was still very much the foundation of these solutions, we also explored the features offered that have value beyond just ITSM and traditional IT use-cases. It was therefore important that the vendors participating offered capabilities beyond just the core of ITSM. Additionally, vendors needed to have a global presence with customers in at least three regions: Asia and Oceania, EMEA, and North America. We invited solutions that had an estimated or actual revenue associated with the solution of \$30m or above. The solution also needed to offer

capabilities in at least six of the eight categories explored as part of the report, and Omdia must have experienced client demand (via briefing requests or formal requests for information) for detail relating to the solution in question.

Appendix

Further reading

The State of Enterprise Service Management, HDI, www.thinkhdi.com

Author

Adam Holtby, Principal Analyst, Digital Workplace

askananalyst@omdia.com

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Omdia consulting

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CONTACT US

omdia.com

askananalyst@omdia.com