

The Forrester Wave™: Enterprise Service Management, Q4 2019

The 15 Providers That Matter Most And How They Stack Up

by Charles Betz and Will McKeon-White

October 10, 2019

Why Read This Report

In our 23-criterion evaluation of enterprise service management (ESM) providers, we identified the 15 most significant ones — Atlassian, Axios, BMC Software, Broadcom, Cherwell Software, EasyVista, Freshworks, IBM, Ivanti, ManageEngine, Micro Focus, ServiceNow, SolarWinds, TOPdesk, and USU Software — and researched, analyzed, and scored them. This report shows how each provider measures up and helps infrastructure and operations (I&O) professionals select the right one for their needs.

Key Takeaways

ServiceNow, BMC, Micro Focus, Cherwell, Axios, And USU Software Lead The Pack

Forrester's research uncovered a market in which ServiceNow, BMC Software, Micro Focus, Cherwell Software, Axios, and USU Software are Leaders; Atlassian, IBM, TOPdesk, Ivanti, and Broadcom are Strong Performers; and EasyVista, ManageEngine, Freshworks, and SolarWinds are Contenders.

Machine Learning, Business Workflows, And Cloud-Native ITSM Are Key Differentiators

As customers expand their platform usage beyond the borders of IT service management (ITSM), broader work support, platform intelligence, and ITSM innovation dictate which providers lead the pack. Vendors that can provide more non-IT modules, integrated machine learning, advanced analytics, and expanded ITSM functionality position themselves to successfully deliver enhanced service delivery capabilities that lead to improved employee experience for their customers.

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by [Charles Betz](#) and [Will McKeon-White](#)
with [Stephanie Balaouras](#), Matthew Flug, and Diane Lynch
October 10, 2019

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Related Research Documents

- [ESM: Elevate Service Value Beyond The Technology Organization](#)
- [Now Tech: Enterprise Service Management, Q3 2019](#)
- [Shift To Enterprise Service Management To Improve The Employee Experience](#)



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Enterprise Coverage And Machine Learning Define The Future Of ESM

In 2018, ITSM vendors were still completing the transition to ESM.¹ In 2019, the highly competitive ESM market has solidified, and customers are looking to expand their usage and maturity beyond initial use cases such as HR and facilities. To meet this demand, vendors are developing out-of-the-box, non-IT modules and functionality to help their customers scale their efforts. At the same time, customers are looking to increasingly leverage self-service options, speed up service delivery, and enhance their own ITSM capabilities to meet the challenges of the changing technology landscape. To address these needs, ESM vendors are rapidly increasing their utilization of machine learning systems and weaving them throughout their platforms.

As a result of these trends, I&O pros should look for ESM providers that are:

- › **Expanding supported non-IT use cases.** Leading ESM vendors are providing an ever-increasing number of natively supported enterprise use cases, now supporting areas like finance, legal, customer success management (CSM), and more with premade portals, workflows, and even asset types. In addition, ESM vendors are expanding the depth of functionality for existing enterprise service management modules, with specific workflows, mobile-specific functionality, and cross-department workflow support.
- › **Emphasizing service management intelligence.** Leading ESM vendors are meeting their customer demand with application of machine learning capabilities, such as natural language processing in incident management, to assist with identification/classification. Other examples of machine learning applications include knowledge-base-article autosuggestion for incident resolution, real-time natural language querying, and change management optimization analytics. Vendors are also enhancing user-facing intelligence with self-service channels, augmenting service management with chatbot capabilities.
- › **Innovating in core ITSM.** Although ITSM is a well-established area, ESM vendors are still finding ways to push it forward. In adapting to the pressures from DevOps and cloud-native, leading ESM vendors are increasingly improving their support for processes such as configuration/change and incident management, continuously introducing new features such as Kanban work management systems, container support, and incident management collaboration/swarming capabilities.

Evaluation Summary

The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market and doesn't represent the entire vendor landscape. You'll find more information about this market in the Forrester report "[Now Tech: Enterprise Service Management, Q3 2019](#)."

We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

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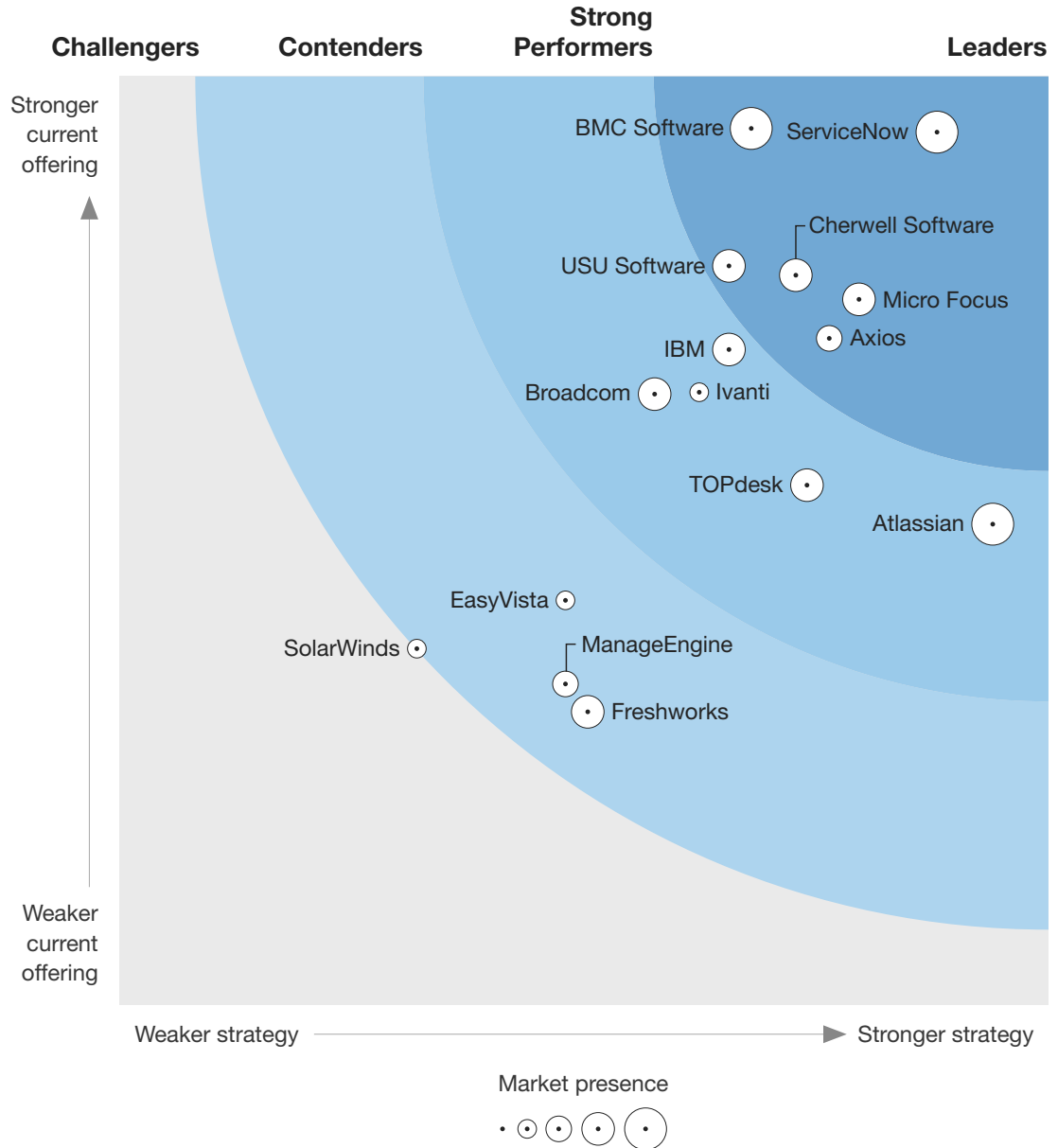
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FIGURE 1 Forrester Wave™: Enterprise Service Management, Q4 2019

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FIGURE 2 Forrester Wave™: Enterprise Service Management Scorecard, Q4 2019

	Forrester's weighting	Atlassian	Axios	BMC Software	Broadcom	Chenwell Software	EasyVista	Freshworks	IBM
Current offering	50%	2.59	3.59	4.72	3.29	3.93	2.18	1.58	3.53
Enterprise services	35%	1.40	3.40	4.20	2.20	5.00	1.00	1.00	4.60
Core service management	30%	3.00	4.00	5.00	4.00	3.50	3.00	1.50	3.00
Platform	20%	3.00	3.00	5.00	3.60	3.40	2.40	2.40	3.60
Technology management	15%	4.00	4.00	5.00	4.00	3.00	3.00	2.00	2.00
Strategy	50%	4.70	3.82	3.40	2.88	3.64	2.40	2.52	3.28
Vision and value proposition	25%	5.00	3.00	3.00	3.00	5.00	1.00	1.00	3.00
Innovation road map	20%	5.00	5.00	3.00	3.00	3.00	3.00	1.00	3.00
Execution road map	20%	5.00	3.00	5.00	3.00	3.00	3.00	3.00	3.00
Commercial/pricing model	15%	3.00	5.00	3.00	3.00	5.00	5.00	5.00	3.00
Supporting services and ecosystem	20%	5.00	3.60	3.00	2.40	2.20	1.00	3.60	4.40
Market presence	0%	5.00	2.50	4.50	3.50	3.50	2.00	3.50	3.50
Customer numbers	25%	5.00	1.00	5.00	3.00	1.00	1.00	5.00	3.00
Deployment size	25%	5.00	5.00	5.00	5.00	3.00	3.00	1.00	5.00
Solution revenue	25%	5.00	1.00	5.00	5.00	5.00	1.00	3.00	5.00
Growth in revenue	25%	5.00	3.00	3.00	1.00	5.00	3.00	5.00	1.00

All scores are based on a scale of 0 (weak) to 5 (strong).

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FIGURE 2 Forrester Wave™: Enterprise Service Management Scorecard, Q4 2019 (Cont.)

	Forrester's weighting	Ivanti	ManageEngine	Micro Focus	ServiceNow	SolarWinds	TOPdesk	USU Software
Current offering	50%	3.30	1.73	3.80	4.70	1.92	2.80	3.98
Enterprise services	35%	2.20	1.00	3.00	5.00	2.20	3.00	3.80
Core service management	30%	3.50	1.00	4.50	4.50	1.50	3.00	3.50
Platform	20%	4.40	2.40	4.00	5.00	2.00	2.00	5.00
Technology management	15%	4.00	4.00	4.00	4.00	2.00	3.00	4.00
Strategy	50%	3.12	2.40	3.98	4.40	1.60	3.70	3.28
Vision and value proposition	25%	3.00	1.00	3.00	5.00	1.00	3.00	3.00
Innovation road map	20%	3.00	3.00	5.00	5.00	1.00	3.00	5.00
Execution road map	20%	3.00	1.00	3.00	5.00	1.00	5.00	3.00
Commercial/pricing model	15%	3.00	5.00	5.00	1.00	5.00	5.00	3.00
Supporting services and ecosystem	20%	3.60	3.00	4.40	5.00	1.00	3.00	2.40
Market presence	0%	2.00	3.00	3.50	4.50	2.00	3.50	3.50
Customer numbers	25%	3.00	3.00	3.00	5.00	3.00	5.00	3.00
Deployment size	25%	1.00	1.00	5.00	5.00	1.00	3.00	5.00
Solution revenue	25%	3.00	3.00	5.00	5.00	1.00	3.00	5.00
Growth in revenue	25%	1.00	5.00	1.00	3.00	3.00	3.00	1.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Vendor Offerings

Forrester included 15 vendors in this assessment: Atlassian, Axios, BMC Software, Broadcom, Cherwell Software, EasyVista, Freshworks, IBM, Ivanti, ManageEngine, Micro Focus, ServiceNow, SolarWinds, TOPdesk, and USU Software (see Figure 3).

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FIGURE 3 Evaluated Vendors And Product Information

Vendor	Product evaluated	Product version evaluated
Atlassian	Jira Service Desk	On-premises version: 4.2
Axios	Assyst	Version 11
BMC Software	BMC Helix	19.05
Broadcom	Clarity Service Management	17.2
Cherwell Software	Cherwell Service Management	9.6
EasyVista	EV Service Manager	Oxygen Release 2.0
Freshworks	Freshservice	SaaS
IBM	IBM Control Desk	7.6.1
Ivanti	Ivanti Service Manager	2019.1
ManageEngine	ServiceDesk Plus	SaaS
Micro Focus	Service Management Automation X (SMAX)	2019.05
ServiceNow	ServiceNow	New York release
SolarWinds	SolarWinds Service Desk	v1.0
TOPdesk	TOPdesk Enterprise	9.06
USU Software	Valuation	5.1

Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

Leaders

- › **ServiceNow continuously shapes the ESM market.** ServiceNow is the largest ESM player in the market and currently the dominant player in the large enterprise market. With one of the clearest and broadest strategic visions out there, this vendor has been investing in automation and intelligence, ease of use, DevOps, and its position as an enterprise platform. Forrester has recently noticed increasing competition between ServiceNow and Salesforce to become the general enterprise workflow platform of choice.

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ServiceNow continues to rise above its competition in the sheer breadth and depth of its portfolio, from HR service delivery to finance operations to IT operations management to a dedicated employee onboarding module. ServiceNow's ITSM incident management, including major incidents, incident communications, and robust chat capability, is best-in-class. It also boasts the only KCS v6-certified knowledge management module in this research. In ITSM, ServiceNow continues to lag in applying the full power of machine learning and analytics to improving the change management process. Based on reference feedback, Forrester recommends that customers budget for dedicated staff for administration and development in addition to planning for the solution's large price tag. One reference customer noted that if a company wants to use the tool just for ITSM, or just for basic enterprise services workflows, it likely won't get enough value out of it to justify the investment. Taking this into consideration, ServiceNow is a good fit for large enterprises pursuing a comprehensive ESM transformation.

- › **BMC Software pursues forward cognitive service management.** BMC Software's primary ESM offering is BMC Helix. Now a private organization, BMC was acquired by KKR in 2018 and is one of the largest vendors in the ITSM and ESM space.² BMC is known for its Remedy offering as well as IT operations management products covering monitoring, provisioning, and related solutions; BMC Helix is its next-generation ESM platform. This vendor is regaining market position and mindshare, overcoming upgradability woes that drove many customers away from earlier Remedy versions.

BMC is now championing cognitive service and operations management and has oriented its offerings around ESM as well as intelligent service management, adding increasing numbers of advanced features like a virtual agent, change risk scoring, and more. BMC Helix is a formidable ITSM platform, with superior features in all ITSM categories. This vendor's discovery module for its configuration management database (CMDB) is best-in-class. Intelligent service management capabilities are powerful and differentiating, including cognitive summarization of user request interactions; intelligent capabilities include the reuse of existing workflows for chatbot conversations. Reference customers report that some fragmentations in BMC Helix, such as inconsistent development of new capabilities and internal integrations within the platform, have resulted in problems like missing notifications for updated tickets. Although BMC has placed some DevOps bets, coverage of upstream software lifecycle phases remains limited. BMC Helix is a solid contender for the largest, most complex enterprise workloads and is also ideal for organizations previously running Remedy or with other commitments to BMC products.

- › **Micro Focus injects actionable analytics into service delivery.** Micro Focus' ESM platform, SMAX, comes from an ITSM background and emerged from the 2017 spinout and merger of Hewlett Packard Enterprise's software business and Micro Focus. In addition to a strategy focusing on increased ESM and intelligent service management, Micro Focus has centered its platform and vision around the IT4IT framework. With in-market awareness of its offering increasing, Micro Focus has a broad portfolio covering both IT operations management (ITOM) and DevOps and is showing signs of a commercial comeback.

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SMAX has evolved to expand the scope of services beyond IT and integrate further intelligence into the service delivery lifecycle. Micro Focus provides one of the most intelligent service management platforms currently available, including uniquely advanced automated change risk scoring and proactive change optimization suggestions. It also supports proactive knowledge creation suggestions, incident correlation, suggested incident resolution, and a virtual agent. Deployment is via a fully containerized solution, one of only a few in the ESM space. However, reference customers did note that certain features in the platform didn't appear complete. Micro Focus' SMAX platform is a good choice for customers that wish to adopt a comprehensive ESM platform and take advantage of emerging intelligent service management features.

- › **Cherwell Software expands the boundaries of who can do ESM.** Cherwell's ESM platform is Cherwell Service Management. In research briefings, Cherwell, a privately held company that's majority-owned by KKR, presented one of the clearest strategic conceptions of the ESM market's trajectory.³ Targeting the midmarket with an ESM-oriented platform, Cherwell has grown rapidly over the past year. With its addition to the Amazon Web Services (AWS) marketplace as a preferred ESM solution (a notable vote of confidence), this vendor has lowered barriers to ESM entry.

Cherwell's strengths lie in its ESM commitment: It provides facilities, HR, and project management modules. With a full graphical canvas and independence of data and workflow, Cherwell provides users with a powerful low-code/no-code development platform, allowing for upgrade-compatible customization. It also demonstrates best-in-class capabilities in its portal integration with cloud providers. However, Cherwell has been slower to implement advanced intelligent service management capabilities such as a virtual agent or dynamic change risk scoring. As it stands, Cherwell's platform is a good fit for midsize enterprises looking to adopt a comprehensive ESM platform.

- › **Axios provides core IT service management breadth.** Axios' primary ESM offering is its assyst platform. Axios, one of the first vendors to identify the ESM opportunity, has one of the broadest and most comprehensive ITSM offerings out there. Based on features-to-price, it's one of the highest-value solutions in this research, with all features available as one unified product. While Axios doesn't have the market presence of some of its competitors, it does enjoy steady growth in its targeted markets.

Axios' greatest strengths lie in the breadth and depth of its core ITSM product. It includes IT business management (ITBM) (e.g., service costing analytics) and ITOM capabilities at no extra cost. We noted strong external supplier integration and management and increasing intelligence (e.g., proactive incident resolution suggestions). The platform's primary weaknesses stem from elements in the platform interface that the vendor has yet to modernize and that customers noted can be clunky or nonintuitive. Axios is ideal for organizations seeking exceptional value in a foundational ITSM tool that's capable of supporting service management capabilities to other parts of the organization as well.

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- › **USU Software adds industry-specific expertise to ESM.** A German ESM provider, USU Software is positioning its Valuation product to meet the needs of the global ESM market, using its industrial manufacturing-vertical-specific experience to provide unique capabilities. USU also owns the Aspera software asset management tool. Its vision is ITSM-centric and operational, with limited coverage of upstream development capabilities (e.g., DevOps). With a large presence in EMEA and an expanding presence in North America, USU sees the opportunity in the ESM space for digitizing service processes across enterprises.

USU Valuation's strengths lie in the breadth of its platform and its unique, industry-specific offerings. In addition to providing a strong ITSM and workflow automation tool, it features capabilities like workflows for the predictive maintenance of industrial equipment and assets. Its low-code/no-code platform is among the strongest in this evaluation. Containerization simplifies deployment and administration. Reference customers noted that USU has a complex platform with a notably high learning curve and usability issues, requiring sufficient investment to deliver value. USU is well suited to large enterprises seeking to automate their business processes or to those with specific use cases, such as industrial manufacturing.

Strong Performers

- › **Atlassian connects ESM and DevOps.** Atlassian's primary ESM offering is Jira Service Desk. The tool's market presence has grown rapidly over the past year and is Atlassian's fastest-growing product. This vendor's strategy centers around a comprehensive digital product pipeline, including planning, collaboration, task, and product development (Jira and Trello); continuous delivery (Bitbucket); knowledge management (Confluence); and operations (Opsgenie and Statuspage).

Jira Service Desk's greatest strengths lie in its usability, ecosystem, and integrations with other parts of the Atlassian suite. Its incident management, when considered as a capability including Jira Service Desk, Opsgenie, and Statuspage, approaches best-in-class status (but requires a set of independent products to achieve). The platform's weaknesses are in deeper ITSM functionality (CMDB is a notable gap), lack of out-of-the-box non-IT modules, and machine learning capabilities. Many additional capabilities are available in the extensive Atlassian marketplace. Full Atlassian capabilities require integrating a number of products à la carte, adding to acquisition and pricing complexity. Jira Service Desk promises to be an excellent tool for organizations that have a large Atlassian footprint and are looking to adopt an ESM tool or for organizations that want to do ESM and are searching for a cost-effective alternative.

- › **IBM expands the boundaries of ESM asset management.** With IBM Control Desk for Maximo, IBM's ESM offering comes at the market from a slightly different angle than its category peers. The Maximo platform has a deep and notable basis in industrial asset management and is in wide use in verticals such as transportation and energy and by managed service providers (MSPs) serving those verticals. IBM's ESM offering leverages IBM's broader ecosystem to expand its capabilities, including the Watson platform.

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IBM Control Desk with Maximo's greatest strengths revolve around IBM's powerful workflow, automation, and work-scheduling capacities, coupled with industry-specific solutions. Its internet-of-things (IoT) capabilities are notable, especially the breadth and depth of third-party solutions. Mobile support, which is a new evaluated functionality for this Forrester Wave, is native. Taken all together, IBM's solution can rapidly automate a wide variety of complex workloads, from contract management to industrial maintenance to fleet management. Additionally, the platform has brought some intelligent capabilities online, such as advanced knowledge management (leveraging Watson's capabilities for knowledge mining), not only for formal articles but also from ancillary sources such as ticketing systems. Usability is the platform's major weakness. As an ITSM play, Control Desk covers the fundamentals but has room for improvement in core request and incident. IBM Control Desk and Maximo are ideal solutions for MSPs and organizations looking for an ESM tool with unique requirements, such as energy and utilities.

- › **TOPdesk provides accessible ESM.** A longtime ITSM tool provider, TOPdesk has shifted to fully address the ESM market during the past few years and has oriented its strategy to provide for all forms of service requests, expanding its collaborative abilities and out-of-the-box modules. While originally an exclusively European Union vendor, TOPdesk has grown steadily in North America, gaining popularity with midsize enterprises and public sector organizations, including higher education, and is pursuing a strategy of steady organic growth.

TOPdesk is a well-rounded ITSM and ESM product with fast time-to-value. Request management is notably strong, with Kanban, intelligence, and costing. Reference customers reported that the platform's weaknesses center around its integration and customization capabilities. While the platform is built for speed of utilization, this translates into some rigidity. According to reference customers, this has occasionally caused hiccups when they couldn't get the platform to do quite what they wanted. The platform is well suited to midsize enterprises looking for a tool with both ITSM and ESM capabilities and experience.

- › **Ivanti offers an omnichannel ESM platform.** An ITOM and ITSM vendor transitioning to the ESM market, Ivanti is seeking to make its platform, Service Manager, a center of work for midsize enterprises. Starting from a strong basis in systems and endpoint management, Ivanti has recently introduced Ivanti Cloud, expanding the platform's capabilities with usability and self-service enhancements, service, and request intake capabilities as well as machine learning functionality. It supports not only the ESM platform but also inbound channels through a chatbot and Ivanti Voice.

Ivanti's strengths lie in its strong endpoint management and ITOM support as well as the enhancements it's made to incident management and its advanced analytics platform, Smart Advisor. Native mobile apps integrated with telephony are a plus. Ivanti provides a number of avenues for dealing with incidents, including multiple inbound channels and knowledge suggestion. Smart Advisor offers the unique capability of natural-language-generated, real-time queries. Customers particularly appreciate Ivanti as an integrated, "more than the sum of its parts" suite of products. Ivanti's primary weakness lies in its ESM module offerings, which are limited to a

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consolidated request portal with some out-of-the-box non-IT workflows. Ivanti Service Manager is a good buy for organizations looking to adopt an ITSM tool with strong endpoint management and real-time analytics or for those pursuing an omnichannel ESM strategy.

- › **Broadcom looks to enable customers' end-to-end digital transformations.** Broadcom's ESM platform, now branded as the Clarity Service Management (Clarity SM) platform, came to Broadcom with its acquisition of CA Technologies. Broadcom's ambitious expansion into enterprise software has received much industry attention, and time will tell whether the Broadcom portfolio strategy will succeed in this new domain. Rather than aggressive expansion, Broadcom is looking to deepen its relationship with existing customers and provide them with an end-to-end digital transformation, from the silicon to the software stack. The products' customer numbers have remained about the same for the past few years, and market awareness has trailed off considerably.

One important segment for Clarity Service Management is MSPs, a demanding segment requiring strong manageability and multitenancy capabilities. The platform is scalable and has broad and deep functionality in core ITSM, but as a product, it fails to offer discrete ESM modules such as facilities or HR, instead offering reusable workflows at a more granular level. Features like "heat map" and "weather" analytics for the service desk are differentiating, as is the vendor's knowledge management module, with strong analytics supporting continuous improvement. The platform's primary weaknesses stem from its age. While Broadcom is pursuing a broad modernization effort, both the UI and the automation have become outdated in various ways; notably, in the low-code/no-code platform administration module. Clarity SM is a good fit for organizations that have a large CA Technologies footprint or are looking to deepen their relationship with Broadcom.

Contenders

- › **EasyVista aims to drive self-service for its customers.** As one of the first vendors to offer project as well as service management, EasyVista's ESM platform, EV Service Manager, has long had an expansive view of ITSM. Based in France, the vendor is stronger in the European market than in the Americas and is experiencing considerable growth. To support this continued growth, EasyVista is focusing its strategy on providing a no-code platform oriented around simplicity and usability for service delivery, with the aim of allowing organizations to rapidly expand the platform's IT and non-IT use cases through the creation of "micro apps."

EasyVista's strengths lie in the ease of no-code development and in platform usability (the company has recently executed a UI overhaul). While not best-of-breed in any one ITSM area, features are generally solid. The platform's weaknesses lie in the lack of ESM modules and an entry-level CMDB approach. EasyVista's EV Service Manager is a good fit for organizations with a strong ITSM practice looking to branch out both to ESM and self-service and grow with the vendor.

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- › **ManageEngine would like to speed ESM adoption.** India-based ManageEngine, a division of Zoho, seeks to lower barriers to entry into the service desk market. Its ServiceDesk Plus product provides a request framework and a service desk instance serving as the basis for each departmental desk, such as IT or HR. Its low-cost model has proven popular with smaller organizations and is enjoying rapid growth but nonetheless has capabilities to scale to larger organizations.

ManageEngine's strength lies in its ease of use. From portal configuration to workflow creation to integrations into other systems, customers report the ability get it up and running in minutes. ManageEngine's weaknesses lie in its ESM approach — as of the time of this evaluation, ManageEngine didn't provide any out-of-the-box ESM modules or workflows. Functionality such as knowledge management and change management are still relatively manual in comparison with peers. ServiceDesk Plus is a good fit for organizations looking to rapidly build out basic service management capabilities at a manageable cost.

- › **Freshworks looks to meet all of an enterprise operation's needs.** A recent and aggressive entrant to the ESM market, Freshworks' Freshservice has made strides in enterprises of all sizes with its free-to-try model and accessible interface. Freshworks has also been expanding the number of its product offerings and provides solutions for everything from ESM to CRM to Agile project management to website monitoring. Freshworks is not only developing more ESM capabilities but also seeking to provide a comprehensive technology suite across enterprise operations.

Freshworks' greatest strength lies in the platform's usability and intuitive interface. Reference customers noted rapid success with the tool. In addition, Freshworks has one of the easiest-to-use extension marketplaces, allowing customers to rapidly add functionality and integrations. However, Freshworks' support for ITSM is generally at entry level. Additionally, reference customers report that some core functionality, such as authorization levels, is relatively simplistic. Freshworks' Freshservice is a good fit for small or midsize organizations looking for a low-cost and intuitive ITSM tool to grow into their ESM platforms.

- › **SolarWinds provides a platform that works with minimal investment.** SolarWinds is a recent entrant to the ESM market with its acquisition of Samanage, now rebranded as the SolarWinds Service Desk solution. Targeting organizations of all sizes, SolarWinds is looking to expand its market footprint with messaging focused on fast time-to-value. In addition, it's building out closer integrations between its Service Desk solution and other offerings, notably its strong network management platform.

SolarWinds' strengths lie in the platform's ease of use and rapid rollout of features. Reference customers noted repeatedly that SolarWinds was extremely straightforward to set up and introduce to their organizations. This usability not only allowed customers to set up core workflows quickly but also helped them move beyond core service delivery into non-IT workflows and rapidly deliver on ESM's promises. Reference customers also noted a high rate of feature introduction. SolarWinds' ITSM capabilities are basic, and customers mentioned a lack of flexibility in the tool. SolarWinds' Service Desk is a good fit for existing SolarWinds customers or for any organization looking to rapidly pursue ESM.

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Evaluation Overview

We evaluated vendors against 23 criteria, which we grouped into three high-level categories:

- › **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include enterprise services, core ITSM, platform capabilities, and technology management.
- › **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated vision and value propositions, innovation road maps, execution road maps, commercial/pricing models, and supporting services and ecosystems.
- › **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's customer numbers, deployment size, solution revenue, and growth in revenue.

Vendor Inclusion Criteria

Forrester included 15 vendors in the assessment: Atlassian, Axios, BMC Software, Broadcom, Cherwell Software, EasyVista, Freshworks, IBM, Ivanti, ManageEngine, Micro Focus, ServiceNow, SolarWinds, TOPdesk, and USU Software. Each of these vendors has:

- › **Demonstrated innovation in core ITSM.** Commodity "table stakes" ITSM capabilities (e.g., ticketing and physical asset registries) weren't directly in the scope of this assessment. They were, however, among the selection criteria that prequalified included vendors for consideration. These vendors needed to support innovative capabilities that included analytics/AI applied to ITSM capabilities, support for containers and serverless computing, support for DevOps, and additional differentiating factors.
- › **Extended ITSM capabilities beyond technology services.** ESM extends ITSM capabilities to other areas of the enterprise (e.g., facilities or HR). To be included in this research, vendors needed platform features extending their service management capabilities to other service delivery areas.
- › **Managed demand and supply through a service app store and service portfolio.** Consolidating shared enterprise services access into one common portal is a key enabler of ESM. Such consolidation unifies demand and execution and increases organizational visibility into workflows and resource load (e.g., demand and queue management). To be part of this evaluation, vendors had to provide this common portal as well as portal development capabilities.
- › **Speeded up workflow automation through PaaS/low-code development.** ESM uses general-purpose PaaS workflow tools available in modern ITSM suites to define processes for non-IT capabilities. To be included in this research, vendors had to provide low-code/PaaS functionality.
- › **Actively engaged the ESM market.** Vendors had to be actively promoting, marketing, developing, and investing in their ESM capabilities to be part of this evaluation.

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- › **ESM market revenue above \$35 million.** To be included in this Forrester Wave, vendors demonstrated, or Forrester estimated, ESM revenue of above \$35 million.

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We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

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The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows [The Forrester Wave™ Methodology Guide](#) to evaluate participating vendors.

In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by August 2, 2019, and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with [The Forrester Wave™ Vendor Review Policy](#), Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with [The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy](#) and publish their positioning along with those of the participating vendors.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the [Integrity Policy](#) posted on our website.

Endnotes

- ¹ See the Forrester report "[The Forrester Wave™: Enterprise Service Management, Q3 2018.](#)"
- ² Source: "KKR Completes Acquisition of BMC Software," KKR press release, October 2, 2018 (<https://media.kkr.com/news-releases/news-release-details/kkr-completes-acquisition-bmc-software>).
- ³ Source: Tamara Chuang, "Cherwell Software of Colorado Springs adds \$172M from existing investor KKR," The Denver Post, April 4, 2018 (<https://www.denverpost.com/2018/04/04/cherwell-software-kkr-investment/>).

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