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The Forrester Wave™: Enterprise Service Management, Q3 2018

The 12 Providers That Matter Most And How They Stack Up

by Charles Betz and Will McKeon-White

August 23, 2018 | Updated: August 23, 2018

Why Read This Report

In our 28-criteria evaluation of enterprise service management (ESM) providers, we identified the 12 most significant ones — Atlassian, Axios, BMC Software, CA Technologies, Cherwell Software, EasyVista, IBM, Ivanti, Micro Focus, ServiceNow, SunView and TOPdesk — and researched, analyzed, and scored them. This report shows how each provider measures up and helps infrastructure and operations (I&O) professionals make the right choice.

Key Takeaways

ServiceNow, Cherwell Software, And Micro Focus Lead The ESM Pack
Forrester's research uncovered an evolving and dynamic ESM market in which ServiceNow, Cherwell Software, and Micro Focus are Leaders; Atlassian, CA Technologies, BMC Software, TOPdesk, Ivanti, and EasyVista are Strong Performers; and Axios, SunView, and IBM are Contenders.

I&O Pros And Their Companies Are Expanding Services Reach With ESM
ESM is critical for enterprises to keep up with the scale and speed of business change. The ESM market is growing as I&O professionals seek ways to improve and expand user access to business and IT services and provide more efficient, automated service delivery.

Business Workflows, Machine Learning, and Low-Code Platforms Are Key Differentiators
To stand out in a crowded IT service management (ITSM) market, vendors are increasingly embracing ESM as a differentiator and growth catalyst. Solutions that provide prefabricated business-oriented service modules, advanced analytical capabilities and machine learning, and easy-to-use platforms for workflow development are well positioned to deliver transparent and efficient service experiences to their customers.

The Forrester Wave™: Enterprise Service Management, Q3 2018

The 12 Providers That Matter Most And How They Stack Up

by Charles Betz and Will McKeon-White
with Sandy Rogers, Julia Caldwell, and Diane Lynch

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ESM Solutions Offer An Improved Platform For Enterprise Services

Organizations have embraced business and sourcing models that increasingly depend on both internal and external service constructs. ESM solutions extend ITSM platform capabilities beyond technology services to also address business-centric use cases (e.g., facilities, HR, and travel); managing service demand and supply through a common platform and portal; a customizable service catalog; and workflow automation through platform-as-a-service (PaaS)/low-code development tooling. The benefits that I&O can glean from ESM solutions include:

› **Service accessibility.** A unified service portal supported by intelligent search provides a single point of contact for service request and fulfillment. Coupled with emerging improvements like chatbots and recommendation engines, ESM platforms help users more easily find and engage with the services and resources they need. The portal can also integrate with operational systems, such as supply chain and customer management systems, and provide a gateway to brokered services, such as cloud/SaaS or business process outsourcing (BPO) providers.

› **Service fulfillment consistency, speed, and transparency.** ESM solutions improve request fulfillment consistency and speed by automating processes and organizing service assets. Vendors are increasingly integrating machine learning, supported by service demand analytics, to improve activities such as service request assignment and categorization. Users can view the status of their requests, and leadership can see the overall patterns of service interactions in the organization.

› **Flexible service configuration.** With PaaS and low/no-code platforms that are beginning to approach parity with dedicated offerings, ESM tools can enable fast creation, deployment, and evolution of service request workflows and applications. Using these tools, service providers can piece together complex processes, integrate externally sourced services, and develop service fulfillment automation in a matter of weeks — or even days. Because of the constant feedback and data these platforms provide, enterprises can also improve service planning and design.

› **Core IT service management.** ITSM remains a key aspect of these platforms. All the products we evaluated in this analysis cover the core processes of request, incident, problem, and change management to various degrees and offer a spectrum of capabilities to track and manage IT assets and resources. Vendors such as BMC Software are deep in their support of traditional ITIL-based ITSM practices, while an Agile perspective informs Atlassian's leaner approach.

Embrace A New Vision For Service Management

ITSM has brought visibility, accessibility, speed, quality, and replicability to IT services for decades, and enterprises have recognized the value of extending these improvements to other business services. Creative applications for these tools, such as fleet management and facilities requests, were at first surprising to ITSM vendors, which mostly focused on IT-related uses.[1] Recognizing the value their customers were realizing, vendors have begun to transition their solutions to better serve a wider range of use cases and constituencies. As you consider moving to this more expansive vision:

- **Be aware that these are still early days for ESM.** ESM solution providers vary in how, and to what degree, they're offering non-IT service coverage. Many vendors have released only one or two of their own business service modules, and most are at early stages in building out third-party application stores and workflow integrations. From a go-to-market perspective, as ESM brings a broader base of business stakeholders to the service management conversation, vendors will need to further adjust how and to whom they sell. They'll also need to effectively support I&O and ITSM leaders who seek to roll out capabilities across their respective enterprises. Fortunately, many success stories are evident, such as the publicly viewable CERN service portal (platformed on ServiceNow), which covers a wide variety of services, with IT only a minority.[2]

- **Know that improving employee experience is a strong ESM business case.** The modern enterprise is built on knowledge workers, who spend far too much time just tracking down the resources and information they need. Support their needs, cut down on confusion, and improve employee productivity through a fully integrated service portal providing frictionless access to the full extent of your organization's resources.[3]

- **Consider ESM for cloud service brokering and service integration and management.** As digital organizations move to more-diverse sourcing models, an ESM solution can help "herd the cats" of infrastructure-as-a-service (IaaS), PaaS, software-as-a-service (SaaS), BPO, and more. Some ESM vendors, such as Axios, distinguish themselves with seamless integration to cloud/SaaS services, including autopopulation of their configuration management databases (CMDBs) when they secure resources. Ivanti tracks external providers' operating level agreements and the underpinning contracts, and BMC Software also offers service level management capabilities.

- **Use ESM as an entry point to introduce AI capabilities into the enterprise.** For many organizations, terms like cognitive and artificial intelligence (AI) are meaningless buzzwords. However, ESM vendors are spending a lot of R&D making cognitive operations (CogOps) real, and it's showing the highest levels of investment and competitive differentiation. Various vendors, such as CA Technologies, Micro Focus, and SunView, offer intelligent search, chatbots, improved routing, automation recommendations, and even sentiment analysis and image analysis. Example applications include request management (e.g., better targeting referrals) and change management (e.g., improving risk analysis).

- **Exploit ESM platform power judiciously.** All these vendors provide some form of configurable workflow tooling, and some, including Cherwell Software, are quite sophisticated and capable of supporting complex processes with their own dedicated data structures and GUI interfaces. But any platform of this nature comes with downsides, such as lock-in, upgrade woes, and unexpected limitations that require investing in additional tools and skills. Develop guidelines appropriate to your organization as to when and how to best use these capabilities.

- **Manage configuration and customization carefully.** Modifying vendor-delivered functionality, especially change management and approval, risk, and escalation processes, can be hazardous. Moving your customizations forward with vendor upgrades can be expensive and difficult unless you architect and manage them carefully. This has been a fundamental reason that organizations stay on earlier versions of ITSM offerings. Look for ways to adapt functionality without placing yourself in an untenable position, such as building well-encapsulated extension modules that are crisply distinguished from vendor functionality. Above all, consult with vendor sales engineering teams for guidance on how best to maintain custom enhancements.

Prepare For The ESM Future

As enterprise service management evolves, it will intersect with other significant organizational capabilities, such as ERP, CRM, BPM, RPA, and PPM.[4] The interplay of these areas will drive business technology management strategies over the next 10 years. Previously unseen convergences (e.g., ERP vendors building or acquiring significant ESM capabilities or ESM vendors building or acquiring more IT operations, DevOps, or platform- or domain-specific business service workflow capabilities) are likely to occur. To navigate these uncharted waters:

› **Expand from EX to managing knowledge work.** Employee experience is crucial, but organizations are just beginning to understand the broader context: managing knowledge work. The modern enterprise consists of numerous internal services that employees seek to engage for knowledge, processes, resource provisioning, and other outcomes. Finding where to go for these services can be difficult, and once an interaction starts, there's often little visibility into its progress. Vendors such as CA Technologies are applying rich analytics to identify crucial enterprise hot zones meriting leadership attention. The promise of a "unified demand funnel" for all forms of IT work has inspired many customers and vendors for years; ESM vendors are extending this vision to all knowledge work.

› **Make ESM a first-class system in your enterprise data strategy.** Ensuring consistency of ESM data with overall enterprise master data is table stakes, including alignment with employee directories, core finance systems, and more. Beyond that, cognitive/AI operations and chatbots, to learn, need access to large data sets such as the accumulated records of service requests and associated knowledge articles. This will require navigating data ownership and access policies across business and technology teams and products in addition to architectural considerations (e.g., federated versus isolated data stores).

› **Integrate ESM at the heart of your service delivery pipeline.** ESM is the closest thing your digital service organization has to its own ERP system, although its evolution is in early stages. As core organizational platforms for services, ESM platforms are increasing in scale, scope, and importance, and their integration with other systems is critical. Upstream systems that manage portfolio, build, release, and deployment activities, and downstream systems, such as application and infrastructure monitoring and management for operational support, extend the value of ESM. In particular, collaborative incident management systems (e.g., PagerDuty) need to carefully align with the workflow-based incident management capabilities in ESM platforms. Specialized integration hubs such as Service-Flow and Tasktop are emerging to assist in these often-complex interoperability issues.

ESM Evaluation Overview

To assess the state of the ESM market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top ESM vendors. After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 28 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 service management, the platform itself, knowledge management and analytics, and technology management.

› **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated each provider's vision and value proposition, innovation road map, execution road map, commercial/pricing module, supporting services, and third-party ecosystem.

› **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's customer numbers, deployment sizes, solution revenue, and growth in revenue.

Evaluated Vendors And Inclusion Criteria

Forrester included 12 vendors in the assessment: Atlassian, Axios, BMC Software, CA Technologies, Cherwell Software, EasyVista, IBM, Ivanti, Micro Focus, ServiceNow, SunView, and TOPdesk (see Figure 1). Each of these vendors:

› **Demonstrates innovation in core ITSM.** Innovative capabilities include, for example, advanced analytics/AI, support for containers and serverless computing, and support for continuous delivery. We didn't assess commodity ITSM capabilities such as ticketing or physical asset registries.

› **Extends ITSM capabilities beyond technology services.** ESM extends process concepts (e.g., request, incident, problem, and change) in ITSM to other areas of the enterprise (e.g., facilities and HR). We assessed vendors on product features as well as their go-to-market strategies for nontechnology business services.

› **Manages 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). We assessed products on the maturity of their portal implementations, including information architecture and third-party integrations.

› **Speeds 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. Vendors demonstrated low-code/PaaS functionality and limitations as well as integration capabilities and AI/cognitive features.

› **Actively engages the ESM market.** We evaluated vendors that are actively promoting, developing, and investing in their ESM capabilities. We assessed corporate ESM strategy as part of this evaluation.

FIGURE 1 Evaluated Vendors And Product Information

Vendor	Product evaluated	Product version evaluated
Atlassian	Jira Service Desk	3.12
Axios	Assyst	Version 10 SP 7.5
BMC Software	Remedy, Remedy with Smart IT, Digital Workplace Advanced	9.1, 18.05, 18.05
CA Technologies	CA Service Management	17.1
Cherwell Software	Cherwell Service Management	9.3.2
EasyVista	EasyVista Service Manager	2016.1.305.1
IBM	IBM Control Desk	V7.6
Ivanti	Ivanti Service Manager	2018.1
Micro Focus	Service Management Automation X	2018.05
ServiceNow	ServiceNow	Kingston
SunView	ChangeGear	Version 7
TOPdesk	TOPdesk Enterprise	8.4.xxx

Vendor Profiles

We intend this evaluation of the ESM market to be a starting point only and encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool (see Figure 2 and see Figure 3). Click the link at the beginning of this report on Forrester.com to download the tool.

FIGURE 2 Forrester Wave™: Enterprise Service Management, Q3 2018

*A grey bubble indicates a nonparticipating vendor.

FIGURE 3 Forrester Wave™: Enterprise Service Management Scorecard, Q3 2018

	Forrester's weighting	Atlassian	Axios	BMC Software	CA Technologies	Cherwell Software	EasyVista
Current offering	50%	2.76	3.83	4.20	3.42	4.10	2.52
Enterprise services	30%	2.60	3.70	4.10	2.30	4.60	2.10
Core service management	25%	2.50	4.50	5.00	4.00	3.00	3.00
Platform	30%	3.30	3.60	4.20	4.00	5.00	2.00
Information management and analytics	10%	1.90	3.00	2.90	3.10	2.30	4.60
Technology management	5%	3.40	4.30	3.30	4.30	4.70	1.60
Strategy	50%	4.70	1.75	1.85	3.40	3.70	2.95
Vision and value proposition	20%	5.00	1.00	3.00	1.00	3.00	3.00
Innovation road map	30%	5.00	1.00	1.00	5.00	3.00	3.00
Execution road map	25%	5.00	3.00	1.00	3.00	5.00	3.00
Commercial/pricing model	10%	3.00	3.00	3.00	5.00	5.00	5.00
Supporting services	5%	3.00	2.00	2.00	5.00	3.00	2.00
Third-party ecosystem	10%	5.00	1.00	3.00	2.00	3.00	1.00
Market presence	0%	3.60	2.00	4.20	3.70	3.50	2.30
Customer numbers	25%	3.00	1.00	5.00	5.00	3.00	3.00
Deployment size	30%	5.00	3.00	5.00	5.00	3.00	1.00
Solution revenue	25%	3.00	1.00	5.00	3.00	5.00	1.00
Growth in revenue	20%	3.00	3.00	1.00	1.00	3.00	5.00

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

FIGURE 3 Forrester Wave™: Enterprise Service Management Scorecard, Q3 2018 (Cont.)

	Forrester's weighting	IBM	Ivanti	Micro Focus	ServiceNow	SunView	TOPdesk
Current offering	50%	2.28	3.02	3.52	4.50	2.97	2.97
Enterprise services	30%	2.70	3.70	3.40	5.00	3.20	3.50
Core service management	25%	2.00	2.00	4.50	4.00	3.50	2.00
Platform	30%	2.00	3.50	2.60	4.70	2.20	3.40
Information management and analytics	10%	1.50	1.90	4.10	3.90	3.70	2.30
Technology management	5%	4.40	3.30	3.60	4.00	2.00	3.30
Strategy	50%	1.95	2.55	3.50	4.60	1.85	2.75
Vision and value proposition	20%	3.00	1.00	1.00	5.00	1.00	3.00
Innovation road map	30%	1.00	3.00	5.00	5.00	3.00	1.00
Execution road map	25%	1.00	1.00	3.00	5.00	1.00	5.00
Commercial/pricing model	10%	3.00	5.00	5.00	1.00	3.00	3.00
Supporting services	5%	4.00	4.00	3.00	5.00	2.00	2.00
Third-party ecosystem	10%	3.00	5.00	4.00	5.00	1.00	2.00
Market presence	0%	2.70	3.00	4.10	5.00	1.80	3.90
Customer numbers	25%	3.00	3.00	3.00	5.00	1.00	5.00
Deployment size	30%	5.00	3.00	5.00	5.00	1.00	3.00
Solution revenue	25%	1.00	3.00	5.00	5.00	1.00	3.00
Growth in revenue	20%	1.00	3.00	3.00	5.00	5.00	5.00

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

Leaders

› **ServiceNow.** A demonstrated leader in the ESM market, ServiceNow has enjoyed meteoric growth since inception, often at the expense of its legacy ITSM competitors. Some notable features include deep ITSM capabilities in asset and configuration management; a variety of business service modules, such as HR and facilities; and one of the market's most powerful PaaS environments, robust enough to be featured in Forrester's research on general-purpose low/no-code platforms.[5] However, the platform may be more "low" than "no" code, as customers noted that they needed skilled developers to achieve success. Further customer concerns include complex licensing and pricing models and ServiceNow's consistently high cost. ServiceNow is prioritizing ongoing UX improvements (including in the development environment and through a new mobile experience) as well as platform investments in a native virtual agent and machine learning functionality. ServiceNow is ideal for larger enterprises with complex needs and enough time and dedicated resources to realize value.

- **Cherwell Software.** Cherwell Service Management has emerged as one of the strongest new players in the ESM space, rapidly building a loyal user base. Cherwell boasts one of the most capable low/no-code platforms for service and workflow design. It also has established ITSM capabilities; dedicated PPM; security, facilities, and HR modules; and strong data governance and compliance functionality. Where Cherwell Service Management lags in relation to competitors is in applying advanced analytics and machine learning, and customers noted issues with its native reporting tool. Although this vendor has a CMDB, most customers use a third-party tool, Firescope, for discovery. Moving forward, Cherwell Software plans to invest in enhancing its UI/UX; expand into more business-oriented modules; and improve collaboration and automation via chatbots, automation toolkits, and RPA integration.
- **Micro Focus.** Micro Focus has a complex portfolio, in part from the spin merge with Hewlett Packard Enterprise (HPE) in 2017, which added Mercury/Kintana and Peregrine lineages to its existing Serena assets. Our evaluation focused on the Service Management Automation X (SMAX) suite acquired from HPE. This offering rewards its users with strong advanced analytics capabilities applied to ESM use cases such as ticket autocategorization. This is coupled with best-in-class change management, including advanced risk analytics and optimization of the change process itself — crucial in the age of DevOps. Micro Focus also has a strong CMDB discovery capability, including Kubernetes, and container-based deployment. While the tool does come at the cost of higher skill requirements than those of other vendors, the company has proven willing to rapidly iterate and improve on its offering. Micro Focus currently offers only limited business-oriented capabilities (HR module) and has now added an effort to develop a service app store to its road map.

Strong Performers

- **Atlassian.** A relatively recent competitor in the service management space with Jira Service Desk, Atlassian has built on its strengths in Agile project management. Originally launched in 2013, it has quickly gained traction and become Atlassian's fastest-growing product. The company has developed a compelling portfolio of integrable products, including Bamboo, Bitbucket, Confluence, and Trello. However, Atlassian isn't as strong as other ESM vendors in some traditional ITSM functions such as change management, and its recommended CMDB solution is from a third party. Customer references also noted leveraging third-party tools for reporting. While Atlassian doesn't bring its own business service modules to market, its broad and diverse app marketplace is a differentiator. Moving forward, Atlassian is planning to make improvements to its global search and machine learning capabilities. The company's loyal customer following and Agile and DevOps credibility, along with Jira's wide industry recognition, all add up to a nontraditional but strong ESM strategy.

› **CA Technologies.** Originally part of the CA Unicenter lineage, CA Service Management has continuously evolved. Customers have begun to leverage it for a variety of use cases, such as HR, procurement, and facilities. CA Technologies offers a variety of corporate service workflows as part of its catalog; however, it doesn't overtly go to market with a broader ESM strategy or explicit business service modules. The use of analytics for prioritizing work based on "heat"; its support for continuous improvement of knowledge management; its ease of portal development; and its mobile capabilities, including camera support, are some key strengths of the platform. Its XFlow interface's machine learning capabilities enhance core ITSM with queue awareness and advanced work prioritization, voice-to-text, autosuggestion, and autocategorization of incidents and requests. Notably, CA Technologies has significant traction with managed service providers (MSPs) that use the product to service many hundreds of clients. As of this writing, however, there is some commercial uncertainty around CA Technologies as a result of its just-announced acquisition by Broadcom.[6]

› **BMC Software.** BMC Software, with its Remedy offering, is one of the best-known names in IT service management. Enterprises have long used its flexible Action Request platform to support a variety of service request workloads at scale, such as customer service in large banks. However, customers often cited difficulty in upgrading from earlier versions of Remedy as their primary reason for moving to other solutions. BMC Software was an early proponent of the broader vision of ESM but has faced increasingly stiff competition in recent years, and at the time of this evaluation, there was some uncertainty regarding the long-term company strategy due to recent ownership changes. BMC Software retains a large customer base, and its coverage of the ITSM core (request, incident, problem, change, and configuration management) is among the strongest in the market. BMC Software continues to make steady improvements in its ESM offering, with Helix Business Workflows and Remedy 9 featuring upgrades to its low/no-code workflow designer among other ease-of-use enhancements. BMC Software declined to participate in our research. Scores are based on Forrester estimates and our review of publicly available product documentation.

› **TOPdesk.** A Netherlands-based vendor founded in 1998, TOPdesk Enterprise originally concentrated on core IT service management capabilities but has since pivoted to focus on customer service. With a developed base in the European midmarket, TOPdesk has been further transitioning to ESM via the release of a broad range of business service modules, such as reservations, property management, and contracts. Leveraging its strong portal designer and straightforward UI, TOPdesk's customers enjoy a fast time-to-implementation and time-to-utilization. Opportunities for improvement include low/no-code platform usability and native reporting capabilities. TOPdesk hopes to further enhance its offering through a sharable service marketplace and improved open APIs. The company is also planning to expand into more geographies with sales and support.

- **Ivanti.** Ivanti arose from the merger of HEAT (ITSM software) and Landesk, the combined product now known as Ivanti Service Manager. Among its strengths are ITSM support, one of the more capable platform-integrated chatbots, and distinctive telephony support. Its platform also provides strong third-party-level service integration and contract management functionality. Ivanti is still going through some ITSM-to-ESM growing pains and has yet to offer its own business service modules. Its marketplace, while large, is still heavily oriented to ITSM. This offering suffers due to complexity of setup, a need for skilled administrators, and a lag in implementing advanced analytics. However, with its planned UI/UX improvements and efforts to expand its marketplace for business services, Ivanti may prove ideal for organizations looking for a single solution to synchronize their IP telephony/PBX and ESM service support.

- **EasyVista.** Focused on the small and medium-size enterprise market, EasyVista recognized the value of integrating project management with ITSM well before other vendors and has long emphasized its low/no-code capabilities as a selling point. EasyVista Service Manager's advanced analytics is also a differentiator, with capabilities for sentiment analysis and intelligent routing. While its quick setup capabilities stand out, EasyVista Service Manager doesn't yet have a full app store or third-party apps integrated into a marketplace offering. Customers, for the most part, must build their own non-IT service modules, with users noting that more-complex workloads can outrun the capabilities of the PaaS low/no-code platform. Moving forward, EasyVista plans to make usability improvements for improved self-help; app delivery; reporting dashboards; and an updated, context-aware user interface.

Contenders

- **Axios.** A long-time IT service management stalwart, Axios is among the vendors that recognized the growing importance of ESM early on. Axios Assyst provides comprehensive coverage of ITIL/ITSM processes as well as broader IT operations management functionality; customers also use it for a variety of non-IT use cases, including fleet management, legal services, and marketing. Enterprises looking to adopt an ESM tool should note Assyst's strengths, including multiple business service modules (e.g., HR, finance, and facilities), machine learning capabilities expanding to workload allocation, and strong change management risk analytics. Integration of cloud IaaS provider offerings (e.g., Amazon) into its service portal with corresponding CMDB updates is a differentiating capability. Some opportunities for Axios to improve include its overall go-to-market strategy and messaging for ESM, along with developing native mobile clients; expanding its knowledge management features; and developing a more robust ecosystem, including offering a services marketplace and third-party integrations to increase its business-oriented services functionality.

- **SunView.** Although this vendor is relatively small, SunView's ChangeGear has gained it recognition and rapid growth, thanks to a strong commitment to ESM. It provides dedicated modules for HR, procurement, facilities, and more. Featuring enhanced AI/machine learning capabilities such as sentiment analysis; assisted ticket processing; and intelligent, experience-based workload routing, SunView provides strong capabilities in both request and incident management. Change management, on the other hand, is awaiting more automation in its risk analysis aspects. While SunView doesn't yet offer an ESM service marketplace and relies on REST APIs for integrations, it has proven itself ideal for smaller organizations with ESM needs, such as schools, nonprofits, and small enterprises. Future plans include further expansion of intelligent/cognitive features across the suite as well as an improved UX for platform customizations, cited as a current challenge by customers.

› **IBM.** IBM has long offered service management and help desk software. With the 2005 acquisition of Maximo, IBM executed the difficult task of replatforming its ITSM applications to leverage the Maximo platform, now called Tivoli Process Automation Engine. Maximo hailed from the enterprise asset management and field service application space, bringing a diverse ecosystem of channel partners for specialized solutions (e.g., managing electrical power grids). IBM Control Desk with Maximo has a configurable low/no-code platform in general, scalable to whatever the use case requires. The solution integrates with Watson AI and its advanced analytics capabilities; however, beyond a capable chatbot, IBM hasn't leveraged Watson to its full potential for ESM purposes. IBM is planning to further modernize its platform, focusing on user accessibility and reporting. In general, the product is ideal for organizations with deep vertical needs that the Maximo ecosystem can serve.

Supplemental Material

Online Resource

The online version of Figure 2 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings. Click the link at the beginning of this report on Forrester.com to download the tool.

Data Sources Used In This Forrester Wave

Forrester used a combination of questionnaires, strategy briefings, demos, product documentation, product marketing, and other publicly available data sources to assess the strengths and weaknesses of each solution. We evaluated the vendors participating in this Forrester Wave, in part, using materials that they provided to us by June 5, 2018.

› **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.

› **Product demos.** We asked vendors to conduct demonstrations of their products' functionality. We used findings from these product demos to validate details of each vendor's product capabilities.

› **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with three of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria for evaluation in this market. From that initial pool of vendors, we narrow our final list. We choose these vendors based on 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation. Vendors marked as incomplete participants met our defined inclusion criteria but declined to participate or contributed only partially to the evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave evaluation — and then score the vendors based on a clearly defined scale. We intend these default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. Vendors marked as incomplete participants met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. For more information on the methodology that every Forrester Wave follows, please visit The Forrester Wave™ Methodology Guide on our website.

Integrity Policy

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

Endnotes

1 For more on ESM and its history, see the Forrester report "ESM: Elevate Service Value Beyond The Technology Organization."

2 Source: "CERN Service Portal," CERN (https://cern.service-now.com/service-portal/).

3 For more on how ESM can help employee experience, see the Forrester report "Shift To Enterprise Service Management To Improve The Employee Experience."

4 ERP is enterprise resource planning; CRM is customer relationship management; BPM is business process management; RPA is robotic process automation; and PPM is product portfolio management.

5 For more on ServiceNow's low/no-code platform, see the Forrester report "The Forrester Wave™: Low-Code Development Platforms For AD&D Pros, Q4 2017."

[6] Source: "Broadcom to Acquire CA Technologies for $18.9 Billion in Cash," CA Technologies press release, July 11, 2018 (https://www.ca.com/us/company/newsroom/press-releases/2018/broadcom-to-acquire-ca-technologies-for-18-9-billion-in-cash.html).

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