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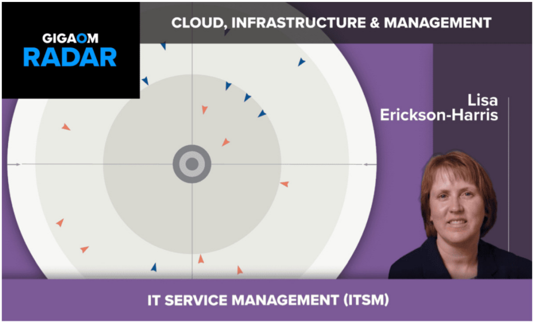
GIGAOM
RADAR
CLOUD, INFRASTRUCTURE & MANAGEMENT
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IT SERVICE MANAGEMENT (ITSM)

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Jul 30, 2024

GigaOm Radar for IT Service Management (ITSM) v3.0

A Turning Point for ITIL Certification

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1. Executive Summary

Information technology service management (ITSM) is a toolset domain that provides both a methodology and technology that can define and manage IT services and their respective value delivered throughout an enterprise. The service desk staff provision, manage, and measure service quality needed for business value and ensure the required technology that underpins ITSM is capable of delivering reliable service.

Services are defined according to service catalog definition and then provisioned in response to service requests run by the IT team. Services encompass infrastructure, assets, people, uptime, configuration, and cost. Workflow management is a core component for handling incidents, service requests, problems, and changes—as well as automation—to drive efficiencies within the organization. Collectively, these factors demonstrate IT's business value and its contributions to the success of the organization.

The domain of ITSM has grown substantially over a number of decades. With that growth, vendor solutions designed for small-to-medium businesses (SMBs), large enterprises, and managed service providers (MSPs) are commonly developed in accordance with a best-practices framework, usually the Information Technology Infrastructure Library (ITIL), which defines specific processes for handling IT services. ITIL is in its fourth generation and demonstrates business value and digital transition of all service management functions, representing significant change.

Since the publication of GigaOm's ITSM Radar during 2023, there has been a disruption in the transition from ITIL 3 to ITIL 4. The ownership and rights of ITIL have been transitioned to PeopleCert, an independent company that acquired Axelos Limited, a joint venture previously created by the UK government. As a result, the structure for ITIL 4 vendor certification, which had been spearheaded by Pink Elephant in North America and SerView in Europe and other parts of the world, is being shifted to a new approach being defined by PeopleCert. Pink Elephant no longer relies on the ITIL branding. However, it continues to support and advocate for ITSM disciplines as it had for decades. Vendors are adjusting, though are not yet fully adjusted to the change in certification authorities. All are focused on delivering best practices that suit customer needs and are aimed at consistency in approach.

This change leaves buyers with a lag in transition to ITIL 4 from its vendors while the market change settles. During 2023, market estimates suggested 20% of ITIL shops had already transitioned to ITIL 4 while another 30% are considering making such a move. GigaOm believes the transition in the certification landscape has impacted the 30% of buyers expected to shift to ITIL 4. While customers want and need reassurance that vendors are committed to best practices, the slowing of the pace from vendors inevitably impacts the adoption by enterprises as well while they rely on tools other than those with already well-established support for ITIL 4. Regardless of this shift, CxOs will be interested in solutions that help them proactively manage IT services, avoid disruption, create efficiencies, and track service costs to deliver and support their enterprise.

GigaOm is evaluating vendors that have committed to ITSM essentials as defined by ITIL 4, an approach that was verified with evidence provided by vendors from SerView, PeopleCert, and Pink Elephant. Scoring will provide a more granular perspective on ITIL 4 with regard to ITSM infrastructure insight and ITSM business value. ITSM essentials are a required item for a vendor to be included in the report. Our scoring examines vendor offerings in these areas and on other key features and important evaluation metrics. The report covers vendors from North America, South America, Europe, and Asia.

This is our third year evaluating the ITSM space in the context of our Key Criteria and Radar reports. This report builds on our previous analysis and considers how the market has evolved over the last year.

This GigaOm Radar report examines 18 of the top ITSM solutions and compares offerings against the capabilities (table stakes, key features, and emerging features) and nonfunctional requirements (business criteria) outlined in the companion Key Criteria report. Together, these reports provide an overview of the market, identify leading ITSM offerings, and help decision-makers evaluate these solutions so they can make a more informed investment decision.

GIGAOM KEY CRITERIA AND RADAR REPORTS

The GigaOm Key Criteria report provides a detailed decision framework for IT and executive leadership assessing enterprise technologies. Each report defines relevant functional and nonfunctional aspects of solutions in a sector. The Key Criteria report informs the GigaOm Radar report, which provides a forward-looking assessment of vendor solutions in the sector.

2. Market Categories and Deployment Types

To help prospective customers find the best fit for their use case and business requirements, we assess how well ITSM solutions are designed to serve specific target markets and deployment models (**Table 1**).

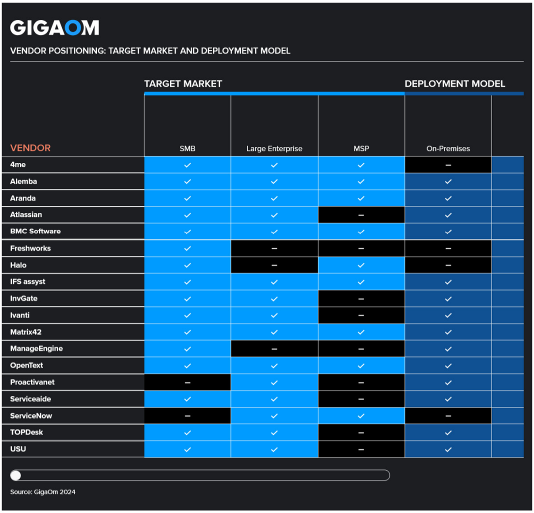
For this report, we recognize the following market segments:

- **SMB**: In the SMB segment, ITSM functionality is similar to that found in enterprise-class solutions at a price point that fits within SMB budget levels. Some vendors place limits on the scale of the deployment, number of users, or even services supported by the ITSM solution. Solutions in this market segment commonly are bundled or closely integrated and inclusive of problem, incident, service request management, and the configuration management database (CMDB), with variations on supporting functionality such as IT asset management (ITAM). Service provider targets are also part of this segment when vendors are able to offer multitenancy.
- **Large enterprise**: Large enterprises benefit from the robust capabilities of ITSM, assuming that the cost, compliance, and process aspects are all incorporated into these solutions. Functionality is often quite similar to that found in the mid-market, though on a much more expansive scale. Additional depth is provided with regard to asset categories, their data, financial metrics, and risk analysis. ITAM helps enterprises save on IT spending and remain in compliance when it comes to corporate targets and contractual commitments.
- **MSP**: MSPs remotely manage a customer's network operations and deal with maintenance, upgrades, and other day-to-day activities, including ITSM. Their needs may align with those in the above categories, and solutions are assessed on ability to meet them.

In addition, we recognize the following deployment models:

- **On-premises:** Self-hosted deployment allows organizations to install and manage ITAM solutions on their own infrastructure. It provides greater control over data and customization but requires in-house hardware and software management. It can be important to some verticals such as government and finance.
- **SaaS:** SaaS deployment involves accessing ITAM solutions hosted and managed by the vendor. Operators access the service over the internet, eliminating the need for on-premises hardware or software installation.
- **Hybrid:** Hybrid deployment combines both SaaS and self-hosted models, offering flexibility. Some components of the ITAM solution may be hosted in the cloud (SaaS), while others run on the organization's infrastructure (self-hosted). This approach suits organizations with diverse security requirements and infrastructure setups.

Table 1. Vendor Positioning: Target Market and Deployment Model



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VENDOR POSITIONING: TARGET MARKET AND DEPLOYMENT MODEL

	TARGET MARKET			DEPLOYMENT MODEL
VENDOR	SMB	Large Enterprise	MSP	On-Premises
4me	✓	✓	✓	–
Alemba	✓	✓	✓	✓
Aranda	✓	✓	✓	✓
Atlassian	✓	✓	–	✓
BMC Software	✓	✓	✓	✓
Freshworks	✓	–	–	–
Halo	✓	–	✓	–
IFS assyst	✓	✓	✓	✓
InvGate	✓	✓	–	✓
Ivanti	✓	✓	–	✓
Matrix42	✓	✓	✓	✓
ManageEngine	✓	–	–	✓
OpenText	✓	✓	✓	✓
Proactivanet	–	✓	–	✓
Serviceaide	✓	✓	–	✓
ServiceNow	–	✓	✓	–
TOPDesk	✓	✓	–	✓
USU	✓	✓	–	✓

Source: GigaOm 2024

Table 1 components are evaluated in a binary yes/no manner and do not factor into a vendor's designation as a Leader, Challenger, or Entrant on the Radar chart (**Figure 1**).

"Target market" reflects which use cases each solution is recommended for, not simply whether that group can use it. For example, if an SMB could use a solution but doing so would be cost-prohibitive, that solution would be rated "no" for SMBs.

3. Decision Criteria Comparison

All solutions included in this Radar report meet the following table stakes—capabilities widely adopted and well implemented in the sector:

- Service management ecosystem
- ITSM certification baseline
- Automation and orchestration
- Reports and dashboards
- Disaster recovery

Tables 2, 3, and 4 summarize how each vendor in this research performs in the areas we consider differentiating and critical in this sector. The objective is to give the reader a snapshot of the technical capabilities of available solutions, define the perimeter of the relevant market space, and gauge the potential impact on the business.

- Key features differentiate solutions, highlighting the primary criteria to be considered when evaluating an ITSM solution.
- Emerging features show how well each vendor implements capabilities that are not yet mainstream but are expected to become more widespread and compelling within the next 12 to 18 months.
- Business criteria provide insight into the nonfunctional requirements that factor into a purchase decision and determine a solution's impact on an organization.

Note: When reviewing key features, keep in mind that we've grouped ITIL components into three categories: ITSM essentials, ITSM infrastructure, and ITSM business value. These tiers tie directly to operational requirements for delivering services and are captured in the key features for ITIL 4 (see **Table 2**).

The categories and ITIL components are:

ITSM essentials: Includes core ITSM functionality that meets the basic needs of any service management operation:

- IT asset management (IAM)
- Problem management (PM)
- Incident management (IM)
- Change enablement (CE)
- Knowledge management (KM)
- Service catalog management (SCM)
- Service level management (SLM)
- Service request management (SRM)
- Service desk (SD)
- Service configuration management (SCOM)

ITSM infrastructure insight: Includes functionality that manages and monitors infrastructure—such as networks, systems, and applications—that may impact service quality or outages.

- Availability management (AM)
- Capacity and performance management (CPM)
- Deployment management (DM)
- Infrastructure and platform management (IPM)
- Monitoring and event management (MEM)
- Release management (RM)
- Service validation testing (SVT)
- Information security management (ISM)

ITSM business value: Includes functionality that provides a bidirectional connection between any two business, financial, or services points in the context of ITSM.

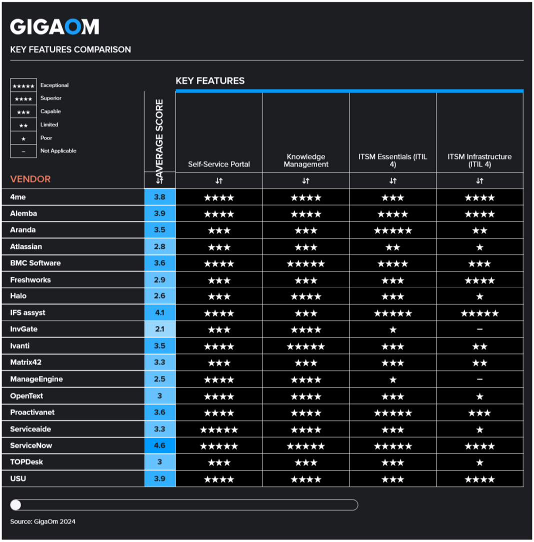
- Portfolio management (POM)
- Project management (PJM)
- Service financial management (SFM)
- Service continuity management (SCTM)
- Workforce and talent management (WTM)
- Supplier management (SM)
- Measurement and reporting (MR)
- Relationship management (RM)

These decision criteria are summarized below. More detailed descriptions can be found in the corresponding report, "GigaOm Key Criteria for Evaluating ITSM Solutions."

Key Features

- **Self-service portal:** Configurable self-service is a set of technology and processes that enable ITSM technical leaders to design multiple self-service portals so that users can jumpstart the service process and streamline service desk operations. This lessens the human labor burden at the service desk and streamlines problem management, incident management, and service requests.
- **Knowledge management:** Knowledge management records, tracks, and presents detailed information about varying solutions to incidents and problems that may arise. It reduces technical support analyst time and increasingly employs AI to populate and locate the closest matching solution to accelerate mean time to resolution (MTTR).
- **ITSM essentials (ITIL 4):** ITSM essentials are the critical disciplines for running a foundational ITSM program. In order to meet table stakes for this report, the vendor needed certification evidence in a minimum of five modules in ITIL 4 specifically. This research considered Pink Elephant, SerView, and PeopleCert at all certification levels.
- **ITSM infrastructure (ITIL 4):** ITSM infrastructure includes functionality that manages and monitors infrastructure—such as networks, systems, and applications—that may impact service quality or outages. This insight provides the service desk with key information about problems and incidents that arise in the environment.
- **ITSM business value (ITIL 4):** ITSM business value connects IT services closer to the business value intended. This includes functionality that provides a bidirectional connection between any two business, financial, or services points in the context of ITSM.
- **Asset discovery:** The ability to manage services requires knowledge of the infrastructure used by the services. Whether the ITSM tool has infrastructure discovery capabilities of its own or consumes the output of another tool, asset discovery is a key capability in the realm of ITSM. Ideally, the ITSM tool should contribute to the configuration management tool to enable discovery of both infrastructure and services.
- **Workflow/automation:** Workflow and automation are essential components of ITSM for streamlining the provisioning and support of IT and enterprise services. These capabilities eliminate labor costs and errors in service delivery and automate the notification of changes in status and impact of problems and incidents.
- **Enterprise service management:** ESM builds upon the ITSM foundation or framework to extend IT services to any business service needed by the organization. This might include HR, facilities, manufacturing, or other mission-critical services that can be managed by the tools inherent in the ITSM solution including service definition, asset tracking, problems, incidents, and service quality.

Table 2. Key Features Comparison



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KEY FEATURES COMPARISON

★★★★★	Exceptional
★★★★	Superior
★★★	Capable
★★	Limited
★	Poor
–	Not Applicable

KEY FEATURES

VENDOR	AVERAGE SCORE ⇅	Self-Service Portal ⇅	Knowledge Management ⇅	ITSM Essentials (ITIL 4) ⇅	ITSM Infrastructure (ITIL 4) ⇅
4me	3.8	★★★★	★★★★	★★★	★★★★
Alemba	3.9	★★★★	★★★★	★★★★	★★★★
Aranda	3.5	★★★	★★★	★★★★★	★★
Atlassian	2.8	★★★	★★★	★★	★
BMC Software	3.6	★★★★	★★★★★	★★★★	★★★
Freshworks	2.9	★★★	★★★	★★★	★★★★
Halo	2.6	★★★	★★★★	★★★	★
IFS assyst	4.1	★★★★	★★★	★★★★★	★★★★★
InvGate	2.1	★★★	★★★★	★	–
Ivanti	3.5	★★★★	★★★★★	★★★	★★
Matrix42	3.3	★★★	★★★	★★★	★★
ManageEngine	2.5	★★★★	★★★★	★	–
OpenText	3	★★★★	★★★★	★★★	★
Proactivanet	3.6	★★★★	★★★★	★★★★★	★★★
Serviceaide	3.3	★★★★★	★★★★	★★★	★
ServiceNow	4.6	★★★★★	★★★★★	★★★★★	★★★★
TOPDesk	3	★★★	★★★	★★★	★
USU	3.9	★★★★	★★★★	★★★	★★★★

Source: GigaOm 2024

Emerging Features

- **OpenTelemetry-informed ITSM:** OpenTelemetry is a set of APIs, software development kits (SDKs), tooling, and integrations designed to generate and manage telemetry data, such as traces, metrics, and logs. The project provides a vendor-agnostic implementation that can be configured to send telemetry data to another tool. It supports a variety of popular open-source projects, including Jaeger and Prometheus.

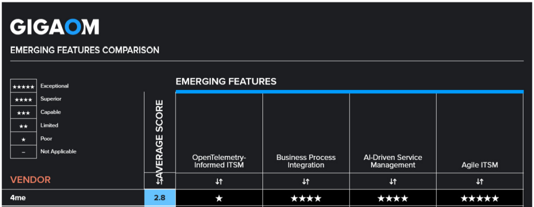
- **Business process integration:** At the heart of ITSM are workflows for managing business processes. In many cases, these workflows relate to IT, with a separate though related requirement to define business process functionality outside of IT for services such as HR and finance, for which technology supports the fulfillment of a business need. The differentiating factors among ITSM tools today center on IT functions, while future ITSM tooling will allow business operations to integrate with IT operations by enabling citizen programmers to use low-code/no-code methods, as has been the case in other technology domains.

- **AI-driven service management:** AI is beginning to empower the next generation of ITSM solutions. Chatbots and incident management are two areas where rules-based heuristics have become a common part of ITSM solutions. Extensions are also being added to knowledge management paradigms to develop knowledge articles and retrieve the most relevant asset data to solve problems as they arise. The more intelligence these tools can acquire, the more valuable ITSM solutions will become.

- **Agile ITSM:** Agile ITSM expands upon ITSM with agile methodologies by combining the robust best practices of ITSM using ITIL and other best practice approaches with the customer-focused agile method. Together, the two provide a robust and efficient approach to service management for an enterprise. Agile brings adaptability to ITSM and uses Kanban and Scrum while emphasizing greater collaboration.

- **Geography-aware and ownership-aware service enablement:** Geography and ownership-aware service enablement takes into account the definition, management, security provisions, and ownership of the service itself and performance metrics. This enablement typically covers mobile devices and remote workers as their usage patterns can impact their work.

Table 3. Emerging Features Comparison



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EMERGING FEATURES COMPARISON

★★★★★	Exceptional
★★★★	Superior
★★★	Capable
★★	Limited
★	Poor
–	Not Applicable

EMERGING FEATURES

VENDOR	AVERAGE SCORE ⇅	OpenTelemetry-Informed ITSM ⇅	Business Process Integration ⇅	AI-Driven Service Management ⇅	Agile ITSM ⇅
4me	2.8	★	★★★★	★★★★	★★★★★

Alemba	3.4	★★★	★★★★★	★★	★★★★
Aranda	3.4	★★★★	★★	★★★	★★★★
Atlassian	2.2	–	★★	★★★★	★★★★★
BMC Software	3.4	★★★★	★★★	★★★★	★★★
Freshworks	1.8	–	–	★★	★★★★
Halo	1.2	–	–	★★★★	–
IFS assyst	2.8	★	★★★	★★★	★★★★
InvGate	1.4	–	★★	★★★	–
Ivanti	3.2	★★	★★★★	★★★★	★
Matrix42	1.8	★★★★	★★★	–	★★
ManageEngine	2.4	★★	–	★★★★	★★★★
OpenText	2.6	★★★★	★★★	★★★★	–
Proactivanet	3.6	★★★	★★★★★	★★★	★★★★
Serviceaide	2.2	–	★★★★	★★★	–
ServiceNow	4.4	★★★★	★★★★★	★★★★★	★★★★
TOPDesk	1.4	–	–	★★★	★★★★
USU	3	★★	★★★★★	★★★★★	–

Source: GigaOm 2024

Business Criteria

- **Flexibility:** Flexibility assesses an ITSM solution's adaptability to manage a wide range of IT services and vertical market domains such as government, utilities, finance, or healthcare. It also considers the flexibility to incorporate third-party solutions by integration or data extraction and to export asset and service information for use by an employee outside of the ITSM solution.
- **Ease of use:** This criterion looks at many aspects of an ITSM solution as it impacts both business and IT teams. This includes the overall usability of the solution, how easy it is to configure or integrate, the level of training that is required, and how intuitive features and functions are to operate. Deployment of the solution must not place a strain on IT teams even as it impacts the way they operate. Ease of customization to meet business and user goals is critical, as is effective branding and visualization that enhances end user interaction.
- **Security:** ITSM environments are exposed to internal and external users and for managed service providers, there are often multiple clients being managed within the same solution. To protect data and reduce security risk, robust security provisions such as single sign-on (SSO), data separation, and definition of roles must be included in the ITSM solution.
- **Scalability:** Scalability is the upper and lower limits of the capacity of the ITSM solution to handle customer environments. Many solutions are designed for SMB environments while others cross into large, enterprise environments. Evidence of large deployments was considered along with the ability to address IT services along with enterprise services.
- **Maintainability:** Each vendor was evaluated on how easily its product can be maintained, which includes updates, upgrades, patches, and bug fixes, along with the delivery method for all maintenance items. Moreover, customizations must be future proofed within a tool.

Table 4. Business Criteria Comparison

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BUSINESS CRITERIA COMPARISON

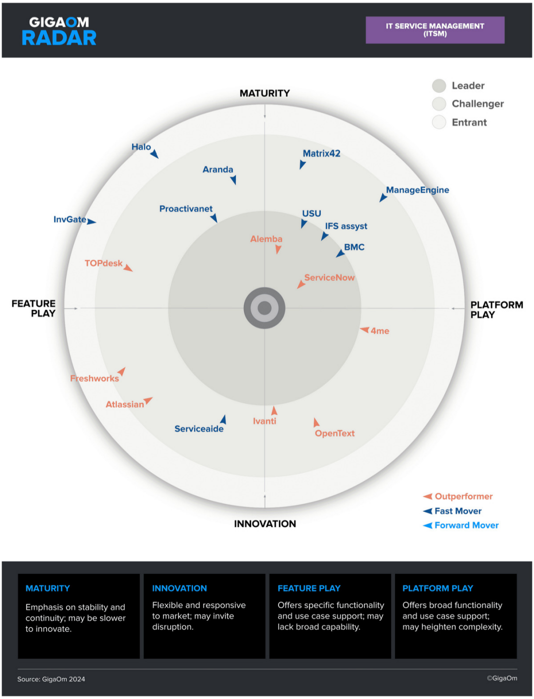
★★★★★	Exceptional
★★★★	Superior
★★★	Capable
★★	Limited
★	Poor
–	Not Applicable

		BUSINESS CRITERIA			
VENDOR	AVERAGE SCORE ⇅	Flexibility ⇅	Ease of Use ⇅	Security ⇅	Scalability ⇅
4me	3.8	★★★★	★★★	★★★★★	★★★
Alemba	4.2	★★★★★	★★★★	★★★★★	★★★★
Aranda	3.4	★★★★	★★	★★★★	★★★
Atlassian	4	★★★★	★★★	★★★★	★★★★
BMC Software	4	★★★★	★★★	★★★★	★★★★★
Freshworks	3.8	★★★★	★★★★	★★★★	★★★
Halo	3.4	★★★★	★★★	★★★	★★★
IFS assyst	3.6	★★★★	★★★	★★★★	★★★
InvGate	3.6	★★★	★★★★	★★★★	★★★
Ivanti	4	★★★	★★★★	★★★★★	★★★★
Matrix42	3.6	★★★	★★★	★★★★★	★★★★
ManageEngine	4	★★★	★★★	★★★★★	★★★★
OpenText	4.2	★★★	★★★★	★★★★	★★★★★
Proactivanet	3.8	★★★★	★★★	★★★★	★★★
Serviceaide	4.2	★★★★★	★★★	★★★★	★★★★
ServiceNow	4.4	★★★★★	★★★	★★★★★	★★★★★
TOPDesk	4	★★★★	★★★★★	★★★	★★★
USU	3.8	★★★	★★★	★★★★	★★★★★

Source: GigaOm 2024

4. GigaOm Radar

The GigaOm Radar plots vendor solutions across a series of concentric rings with those set closer to the center judged to be of higher overall value. The chart characterizes each vendor on two axes—balancing Maturity versus Innovation and Feature Play versus Platform Play—while providing an arrowhead that projects each solution's evolution over the coming 12 to 18 months.



MATURITY

Emphasis on stability and continuity; may be slower to innovate.

INNOVATION

Flexible and responsive to market; may invite disruption.

FEATURE PLAY

Offers specific functionality and use case support; may lack broad capability.

PLATFORM PLAY

Offers broad functionality and use case support; may heighten complexity.

Source: GigaOm 2024

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Figure 1. GigaOm Radar for ITSM

As you can see in **Figure 1**, the majority of ITSM vendors are concentrated within the Maturity half. The seven vendors placed in the Maturity/Platform quadrant demonstrate the maturity of the ITSM market overall with a large number of well-established ITSM solutions. The remaining five in the Maturity/Feature Play quadrant are solution providers that are focused on targeted aspects of the ITSM landscape. Those vendors typically provide ITSM ITIL4 essential capabilities to their customers rather than a broader ITSM scope. The six vendors in the Innovation half are challenging and expanding the footprint of ITSM solutions.

The Feature Play versus Platform Play axis illustrates the progression in this year's Radar report and captures a holistic view of ITSM solutions features and functions that includes ITIL 4 certification for ITSM essentials, ITSM infrastructure, and ITSM business value. Vendors were screened against table stakes to ensure there was a base level of support for ITIL 4 consisting of a minimum of five ITSM essentials ITIL 4 practices. Passing that threshold, vendors were scored based on ITIL 4 certifications in each ITSM ITIL 4 category.

ITIL 4 support was considered along with other important key features for ITSM. In effect, vendors needed to demonstrate an ITIL 4 commitment along with critical service management functionality. The result of this approach is that the Radar reflecting ITIL 4 support takes more items into account beyond ITIL 4 standards in terms of vendor placement on the chart. Some vendor positions have shifted as a result. In the ITSM v2 Radar Report, the majority of key features were related to ITIL 3 certification, ITIL 4 certification, or the progression from ITIL 3 to ITIL 4. As detailed in prior GigaOm Radar reports, the arrows and colors assigned to vendors in this research are meant to show both the pace and directionality of vendor movement toward crucial criteria.

The chart depicts a cross-section of ITSM solutions demonstrating sophisticated and comprehensive capabilities, as it is a mature, but changing, market segment. It provides a quick view of solutions at varying stages along the path to ITIL 4 certification along with other ITSM features, including those best positioned to deliver on this most recent iteration of ITSM best practices. This year, no evaluation of ITIL 3 was made, though consideration of how forward-moving toward robust ITIL 4 certification a solution provider is was a primary metric evaluated.

Due to the shifting certification landscape, the source of certification evidence was a challenge—ITIL 4 best practice standards themselves have now been acquired by Axelos and managed by PeopleCert. This change in ownership has disrupted the certification market. While Pink Elephant has been relied upon by North American vendors to provide substantial certification for ITSM solutions, it can no longer use the ITIL branding. GigaOm accepted evidence from vendors in either PeopleCert's or Pink Elephant's orbit. Some vendors have aggressively pursued PeopleCert standards, while others felt it was important to see the long-term certification strategy play out and wanted to wait for more stability.

The results show that of 18 vendors, all were ITIL 4 certified in a minimum of five ITSM essentials practices. For buyers seeking more significant investment in ITSM essentials by solution providers, Aranda, Proactivanet, ServiceNow, and IFS assyst are ITIL 4 certified in all ten ITSM essentials ITIL 4 practices, followed closely behind by Alemba, Aranda, and BMCeach with nine certified practices, and 4me, Freshworks, Ivanti, Matrix42, TOPdesk, and USU with eight certified ITSM essentials practices. Buyers focused on the core disciplines of problem, incident, change enablement, knowledge management, and other ITSM essentials have a lot of choice when seeking ITIL 4-certified solutions.

Moving to ITSM infrastructure disciplines, the field becomes narrower, though there are still many possible solutions. This research found that solutions with the strongest infrastructure connected disciplines were IFS assyst, with the highest-ranking certification, followed by 4me, ServiceNow, and USU with six ITSM infrastructure disciplines each certified at this time. Finally, Alemba and Freshworks each demonstrate a respectable investment of five ITSM infrastructure disciplines that are ITIL 4 certified. Other vendors showing investment in this category may be suitable solutions for SMB and enterprise customers that are addressing infrastructure management in a way that is separate from ITSM ITIL 4.

Connecting IT and enterprise services to the business is the goal for ITSM and ESM. Vendors that encompass essential, infrastructure, and business value ITIL 4 practices at the most meaningful level include 4me, IFS assyst, TOPdesk, and USU. This group has the most certified practices for ITSM business value at five. Alemba is also strong, following this group with four practices certified. Aranda, Proactivanet, and ServiceNow have three certified ITIL 4 practices each. Buyers seeking the strongest capabilities to manage business value through ITSM ITIL 4 will want to focus on these groups. There remains room for growth in the category of business value for these vendors, along with many that have not yet invested as much in this area.

Several vendors–such as iET Solutions, Marval, and SymphonyAI–have strong ITIL 3 certifications and have not yet made the transition to ITIL 4 certifications, a position consistent with the 2023 GigaOm ITSM Radar report. Most of these vendors have ITIL 4 certification on their roadmaps with plans to make this investment at a time that makes sense to them as the new certification landscape settles into place and as they have more time to adapt to this change. **Figure 2** shows the intersection point of vendors and their level of ITIL 4 certification in ITSM essentials, ITSM infrastructure, and ITSM business value for those enterprises that seek ITIL 4 commitment as a priority for their solutions.

Other key and emerging features were considered in evaluating this year's vendor pool. These features included requirements such as asset discovery, self-service portals, workflow, automation, and ESM. Emerging features included OpenTelemetry, AI, agile ITSM, and increasing needs for geographically aware service management.

Most established vendors are moving to incorporate ML, AI, natural language processing (NLP), and automation into self-service and knowledge management functionality. It is expected that solutions will leverage these and other technologies to ease the burden on the service desk and provide greater visibility for customers that are comfortable with self-service approaches. What is less common is to see vendors that approach emerging and advanced technologies in a novel way. Some examples of interest include:

- Three vendors–Aranda, Proactivanet, and Serviceaide—have worked to address specific vertical markets, such as government, healthcare, defense, education, and financial services, to the extent that they offer prepackaged content and their services address these specific needs.
- Two solution providers—BMC and ServiceNow—have built service delivery risk management into their functionality, providing a mechanism for making service management decisions based on business risk.
- Only six vendors—Alemba, Ivanti, Proactivanet, Serviceaide, ServiceNow, and USU—have developed business process integration functionality that leverages ITSM in the business context beyond ITSM business value modules.
- Agile ITSM is emerging, with ITSM solution providers offering an agile approach to ITSM within their solutions. Others understand there is a continuum that connects with this development as solutions are being rolled out for use. Those vendors with standout agile capabilities were 4me and Atlassian. Others that were very strong included Alemba, Aranda, Freshworks, IFS, ManageEngine, Proactivanet, ServiceNow, and TOPdesk. Clearly, Agile ITSM is becoming a required component within ITSM solutions.
- Many new vendors were added to this research as a result of their commitment to ITIL 4 certification. They are: 4me, Atlassian, Freshworks, Halo, IFS assyst, InvGate, ManageEngine, and TOPdesk.

Ultimately, the decision to purchase an ITSM solution must be made in terms of the priorities of the buyer. Pricing, licensing, and professional services tend to be similar across all solution providers. Whether to include more ITIL 4 certified modules in a solution and pay a higher price, or to pay less and forgo some functionality, plays a role in coming to the right decision for any given buyer. Most organizations will want a solution that meets current needs and a vendor that aligns with their own level of commitment to ITIL 4 best practices at the time of purchase and moving forward.

In reviewing solutions, it's important to keep in mind that there are no universal "best" or "worst" offerings; every solution has aspects that might make it a better or worse fit for specific customer requirements. Prospective customers should consider their current and future needs when comparing solutions and vendor roadmaps.

INSIDE THE GIGAOM RADAR

To create the GigaOm Radar graphic, key features, emerging features, and business criteria are scored and weighted. Key features and business criteria receive the highest weighting and have the most impact on vendor positioning on the Radar graphic. Emerging features receive a lower weighting and have a lower impact on vendor positioning on the Radar graphic. The resulting chart is a forward-looking perspective on all the vendors in this report, based on their products' technical capabilities and roadmaps.

Note that the Radar is technology-focused, and business considerations such as vendor market share, customer share, spend, recency or longevity in the market, and so on are not considered in our evaluations. As such, these factors do not impact scoring and positioning on the Radar graphic.

For more information, please visit our Methodology.

5. Solution Insights

4me: IT Service Management

Solution Overview
4me, a private company, was founded in 2010 with headquarters in Santa Barbara, California. The company originated in Europe and is expanding its presence in North America, with strategic growth investment by PSG Equity obtained in May 2023. PSG Equity's investment supports product innovation as well and was leveraged to acquire StatusCast, an IT operations management (ITOM) acquisition that will automate problem and incident notification, thereby improving ITSM service quality.

The solution has certifications in 19 ITIL 4 disciplines. Certification covers the range of ITSM essentials, ITSM infrastructure, and ITSM business value. The company is committed to ITIL 4 certification and has demonstrated the need for capabilities that go beyond ITSM essentials. Understanding availability and monitoring needs that are part of ITSM infrastructure is supported along with other disciplines, as are business-focused service management disciplines.

Self-service has been redesigned by 4me to allow for more customizations as well as out-of-the-box self-service templates that users can leverage to reduce their time to implementation. The company is offering eight fully developed designs as part of its solution. It leverages the 4me Workflow Automator, which is available to all 4me customers in the solution's packaging. This is in keeping with 4me's philosophy of providing many out-of-the-box samples in all aspects of the solution.

The company provides generative AI support through integration with Amazon Bedrock. AI capabilities have been included since 2023 and cover a number of specific features, such as automated search to find data and problem resolution and generation of a ticket summary using an LLM provided by AWS Bedrock that consolidates a long trail of technical communication and follow-up email communication. It also eases the search process in knowledge management (KM) or documentation. Auto creation and update of knowledge articles with knowledge management follow the KCS standard using GenAI.

From a security standpoint, 4me supports SSO, OpenID, and system for cross-domain identity management (SCIM). 4me allows multiple SSO integrations into the same account where each SSO can be linked to a separate organization, allowing customers from internal or external organizations to log in using their own SSO. Authorizations are role-based and one user can assume multiple roles.

Strengths
4me provides a complete solution that covers ITSM as well as ESM, jump-started with examples and templates. 4me also enables departments leveraging ESM to design and manage their own service portals independently. 4me offers frequent upgrades that are both automatic and non-intrusive. This frequency of upgrades is unique to 4me across ITSM vendors. While smaller, they enable new features to be rolled out regularly and fixes to be applied at the same time. The solution scored well in agile ITSM because 4me provides a means for collaboration and ease of use that is available from only a small segment of ITSM solutions. This is part of 4me's investment in a newly designed GUI.

Challenges
As a company that was launched in 2010, many of its user interfaces (UIs) are in need of upgrades. Customers have requested modernizations, and it is an effort that is underway by 4me and supported by its recent influx of capital, but it is not complete. Asset discovery and management is handled through third-party tool integrations such as Microsoft SCCM and Lansweeper. Information is added to the CMDB, and while this serves the need for many customers, it does not provide observability functionality that exists within many ITSM solutions.

Purchase Considerations
The company operates in Europe and the US targeting companies up to 5,000 employees with scalability to support larger, enterprise deployments. 4me provides a multitenant, cloud-based solution that serves ITSM and ESM requirements.

Only SaaS-based licensing is available from 4me. The company strongly believes that on-premises deployment will not deliver the same user experience or the frequency with which to address new features or correct issues that may arise. Weekly updates are provided for this SaaS-based solution. Licensing is based on “months of use” regardless of role and excludes business users with no additional application module costs.

Customers include the public sector, universities, small businesses, and global corporations. Most customers are in Europe. New investment is targeting more presence in the US and North America. It has a strong focus on MSP support that extends to service and time tracking.

Within the ESM domain, 4me services HR, facilities management, legal services, and telecom services. Users can also develop service catalogs and management for any corporate domain seeking tighter control over its business service delivery.

Radar Chart Overview
4me is positioned in the Innovation/Platform Play quadrant on the Radar due in large part to its recent investment and acquisition strategy. The company received high marks for its innovation despite a history of more than a decade within the ITSM market. The company is designated as an Outperformer and a Challenger moving toward the Leaders circle over the next 18 months powered by its recent investment and product strategies.

Alemba: ASM

Solution Overview
Founded in 2007, Alemba has roots in professional services, a model that is central to achieving the best value from the Alemba Service Manager (ASM). Alemba is a fully remote company based in the UK, with offices in Europe, Australia, and the US. Alemba’s roots come from VMware Service Manager, which it acquired in 2014. ASM is an ITIL-compliant ITSM tool with a focus on request fulfillment delivered as a SaaS-based solution.

Alemba is certified in 18 ITIL 4 practices as confirmed by Pink Elephant. ASM easily met table stakes requirements with nine practices. ASM has also been certified in ITIL 4 ITSM infrastructure insight disciplines of event/availability management, capacity/performance management, release management, and service validation testing. Since last year’s report, Alemba has added certification for ITSM business value in project management, service financial management, service continuity management, and workforce/talent management. Alemba ASM has moved beyond operations to leveraging the solution for ITSM business value in service management.

ASM scored high on knowledge management, with its use of knowledge matching and workflow management adding efficiency and intelligence and reducing resolution time for problems and incidents. For example, when creating an incident, ASM begins searching the knowledge base for answers according to the user types involved with the incident. If there is a major incident already in place that has been captured within the knowledge management module, an easy “add me” button allows the incident to join the existing situation and/or the knowledge management entry for future reference.

Alemba is using pattern matching to make connections with existing knowledge management records and improve efficiency, time to resolution, and insight for automating root cause analysis. Similarly, ASM’s workflow capabilities tie directly to its ability to serve organizations and their business process needs. While aggregation through OpenTelemetry functionality is available, its application is applied to avoid undue downtime and improve the ease of use of its visual interfaces, which reduces complexity along with the company’s improved integration with business process toolsets.

Strengths
Alemba ASM’s migration to support ITIL 4 is among the strongest across all vendors, with it scoring high in all ITIL 4 categories. The solution has near complete competency in all ITSM essential modules, active management of ITSM infrastructure covering about half of these disciplines, and approximately half of the ITSM business value disciplines. The company’s commitment during this year of certification organization transition is self-evident. Alemba uses an atypical approach to multitenancy which provides segregated tenancy for data governance and protection and separation from other customers, which would be desirable for some highly secure environments.

Challenges
Alemba uses third-party tools for asset management. Discovery of assets is achieved via any third-party tool, mapping only the asset data requiring management for ITSM in the CMDB. Moreover, professional services are required for a robust implementation of the solution, in keeping with Alemba’s history of delivering value through its services. OpenTelemetry capabilities could be improved, as the company does not directly follow OpenTelemetry APIs. It does, however, provide metrics insight via its operations dashboards and alerts can be triggered when certain conditions are met providing service status insight.

Purchase Considerations
Alemba ASM can be purchased either as an on-premises or a SaaS-based solution. The company uses a named license system for analysts, requiring one license per user. Licenses are specific for either cloud or on-premises usage. Self-service portal users have access via a site license that is provided by Alemba. Billing is annual.

ASM has been applied to vertical market segments including finance, retail, local and federal government, healthcare, education, defense, charity, transport, and utilities sectors.

MSPs will appreciate the attention Alemba has given to support branding, customization, dashboards, security, and multitenancy. ASM supports all common SSO systems and role-based access control (RBAC) to restrict access to all features, functions, and data in accordance with compliance guidelines, along with separate Microsoft Azure tenancy to ensure complete security for customers.

ASM’s ESM relies on a partitioning mechanism that segregates business functions within a single tenancy instance. All departments can use the same tool to separate workflows, configuration settings, and data security requirements. ASM has use cases that support ESM for HR and facilities departments, though customers can develop other ESM applications.

Radar Chart Overview
Alemba ASM is positioned in the Maturity/Feature Play quadrant on the Radar chart due to its feature-rich solution, though it falls close to the line for Platform Play. ASM received high marks for many key features, while there is growth opportunity in ITSM infrastructure and ITSM business value. Alemba’s positioning on this year’s Radar has shifted slightly from last year’s report due to the change in report methodology that focuses on ITIL 4 certification along with a broader set of functionality. Last year’s Radar relied primarily on ITIL 3 and ITIL 4 certification, which placed Alemba more heavily toward platform representation of ITIL certification. The company is designated as a Leader and an Outperformer because it is investing in frequent releases to cover functional areas such as agile ITSM and is seeking acquisition targets to expand its footprint.

Aranda: Aranda Service Management Suite

Solution Overview
Aranda was formed in 2002 and is headquartered in Aventura, Florida. Its service management portfolio provides asset management, power management, software metrics, a CMDB, and additional products to support a full ITSM implementation.

Aranda had been committed to ITIL 3 and has now made considerable progress in certifying against ITIL 4. As it continues to invest in ITIL 4 best practices, the company is moving ahead in supporting and certifying Aranda Service Management Suite (ASMS) at a steady, albeit non-aggressive pace. The company has certified 15 modules for ITIL 4, including certifications across all ITSM essential modules and three modules in ITSM infrastructure (infrastructure and platform management, monitoring, and release management), and three ITSM business value modules. GigaOm anticipates steady movement by Aranda toward complete ITIL 4 certification of ASMS.

The self-service functionality provided by ASMS includes a centralized service desk that works with a chatbot integrated with Microsoft Teams and a native chatbot integrated with WhatsApp, making collaboration easy and streamlining the process of requesting services. The automation of chatbots resulted in a high score for ASM on this metric. Dashboards provide the ability to drill down to understand real-time business metrics and are customizable to suit organizational needs. Resulting dashboards and the reporting solution (Aranda Query Manager) can share both native and customized reports via email.

ASMS’s asset discovery and knowledge management offer customers basic functionality, and they score accordingly. The knowledge management function does not use AI or ML. However, it does have workflow and business rules that streamline the knowledge management process. Asset discovery using a UEM tool (Aranda Device Management) can discover Windows, Mac, Linux, and network devices, using several protocols such as SSH, WMI/WBEM, SNMP, DNS, NetBios, and ICMP.

While the solution employs chatbots to ease the support process, other technologies such as AI, drag-and-drop features for workflow, and knowledge management could further advance their use. Since last year, ASMS has incorporated into its channels and workflows a group of capabilities based on AI that accelerate the productivity of end users and technicians by reducing repetitive tasks through the use of NLP-based ticket creation (using natural language in virtual agent conversations) and ticket creation based on voice notes (WhatsApp), powered by speech-to-text.

Strengths
Aranda ASMS has a competitive edge and differentiator in its localization for Spanish-speaking regions, with native Spanish-language support and functionality. Operationally, Aranda’s omnichannel communication and integration with Microsoft Teams provides excellent collaboration capabilities, and its chatbots facilitate automated self-service. In terms of forward-looking capabilities, ASMS scored high in providing telemetry metrics because device-related metrics are provided by Aranda Unified Management. Additionally, ASMS can manage according to geographic location of services and assets, supporting

services with an emphasis on security that will appeal to MSPs in particular.

Challenges
ASMS consists of multiple tools under different SKUs, making purchases complex. Professional services from Aranda or a partner are required for a full deployment to assist with its configuration, parameter-driven customization, and deployment. The SaaS offer is considerably more expensive than the on-premises solution. Evaluation of Aranda service management system (ASMS) resulted in high marks for its local language support and automation of self-service functionality. However, it became clear that ASMS's customization demands more technical knowledge of its users than some of its competitors.

Purchase Considerations
Aranda's product mix is composed of a tightly integrated set of modules that work closely with one another. This includes: Aranda Service Management Suite (ASMS), Aranda Field Service (AFLS), Aranda CMDB, Aranda Query Manager (AQM), and Aranda Integration Center (AIC).

Licensing is configured by each individual buyer according to their needs. Cloud licenses are heavily discounted compared to on-premises ones. Limited licenses are available for development, test, user acceptance, and production environments.

Aranda is highly visible in Latin America and has a heterogeneous customer base, including government, healthcare, and banking and financial services verticals in the region, with US deployments as well. ASMS is a multilingual solution, with support for English, Portuguese, and Spanish. Latin America is Aranda's primary market and Spanish is well supported.

Aranda delivers enterprise service management because its solution is agnostic as to whether services are IT or corporate business services.

Radar Chart Overview
Aranda is part of the group of mid-market vendors that offers tightly coupled ITSM and ITAM solutions underpinned by a CMDB as its source of truth for services and assets that support those services. This company is positioned as a Challenger moving toward becoming a Leader in the Maturity/Feature Play quadrant of the Radar chart. Aranda's positioning on this year's Radar has shifted from last year's report due to the change in report methodology that focuses on ITIL 4 certification along with a broader set of functionality. Last year's Radar relied primarily on ITIL 3 and ITIL 4 certification, which placed Aranda heavily toward platform representation of ITIL certification. It is classified now as a Feature Play because it is a specialized, regionalized solution with a significant emphasis around cultural and language needs in Latin America. Aranda is a Fast Mover because it actively develops solutions that meet the unique needs of its target market.

Atlassian: Jira Service Management

Solution Overview
Atlassian was founded in 2002 and is headquartered in Sydney, Australia. Its goal is connecting teams across development, services, and business. While Atlassian is well-known for its broader portfolio, the company is beginning to become more visible in ITSM domains and especially those that understand agile ITSM. Jira Service Management (JSM) provides the company's core ITSM offering. Additional Atlassian Platform products support service management processes as well, though ITIL-aligned functions are delivered via JSM. Relevant offerings for service management include Jira, Jira Product Discovery, and Confluence (bundled as the knowledge management solution within Jira Service Management).

Jira Service Management takes a collaborative approach and has committed to ITIL standardization. Atlassian has invested in ITIL 4 certification through PeopleCert and currently has nine ITIL 4 disciplines certified for Jira Service Management. These certifications cover nine ITSM essentials providing core ITSM functionality. Beyond ITSM essentials, Jira Service Management is certified in the release management discipline within the ITSM infrastructure insight category and several practice areas within the ITSM business value domain, all representing moderate coverage beyond ITSM essentials.

Atlassian brings collaboration expertise to the ITSM buyer. With that, enterprises can establish working relationships with key players that leverage this prior work. The solution includes predefined best practices with ITSM and ESM approaches to service deployment and measurement. Its knowledge management is provided through Atlassian's Confluence.

Jira Service Management includes a self-service portal, configurable workflows, no-code automation, and a native mobile application. It does not support geography-based asset or service management. However, buyers that are invested in Atlassian's broader solution offering will appreciate the integration across Jira platform and the ability to connect differing roles through this shared resource.

Atlassian integrates with OpenAI to provide generative AI support within the solution. Additional external capabilities can be integrated using Atlassian's REST API, which is part of its open platform. Through the platform, users are able to manage services with graphical visibility of processes and details stored in its ITIL 4 standards-based CMDB.

Strengths
Atlassian stands out as the vendor that is looking collectively across development, service, and business groups within enterprises and is being recognized for this distinguishing capability. Jira Service Management brings agile ITSM to the table in the most credible way, as it is the voice of experience now applying it to a new domain. Beyond these key features, Jira Service Management takes a fresh look at connecting knowledge workers with inputs from internal and external stakeholders in a timely manner and at the importance of collaboration tools in delivering service quality and systems in an enterprise.

Challenges
Atlassian is not as well-known as a service management solution, but is building on its recognition with development teams to bring that technology and reputation to ITSM. Additional functionality is needed to robustly compete in the market. This solution takes a lightweight approach to managing services and designing supportive features such as workflow, self-service, and automation. Some businesses will seek more comprehensive built-in features, examples, and templates.

Purchase Considerations
Jira Service Management can be purchased as either an on-premises solution or a SaaS-based solution. The solution takes a named user licensing approach and offers an ELA option. Four tiered options bundle together various capabilities for the buyer.

Atlassian is a good fit for buyers with a need for cross collaboration or those who have experience with other Atlassian solutions to realize the benefits of collaboration and knowledge sharing.

Atlassian holds dominance in technology and telecom provider sectors. The company is a more recent entrant as a provider of an ESM solution. It has an integrated suite of products that it envisions using to connect IT and business teams and design efficient workflow for service delivery. Supported ESM solutions currently include HR, facilities, project management, legal management, contract management, finance management, and customer service management. Atlassian encourages creativity for the application of ESM rather than a prescriptive approach.

Radar Chart Overview
Atlassian is positioned in the Innovation/Feature Play quadrant in response to the company's unique approach to ITSM. The company is a Challenger and an Outperformer, taking a fresh look at ITSM and how to best leverage talent and technology.

BMC: Helix ITSM

Solution Overview
BMC is a long-standing enterprise management technology vendor headquartered in Houston, Texas, with a worldwide presence. It specializes in enabling digital enterprises with products that provide operations management, service management, automation, workflow orchestration, and more.

The current version of BMC Helix ITSM includes substantial support for ITIL 4 modules, exceeding the table stakes handily. It is certified in all ITSM essentials modules and has support for ITSM infrastructure that is consistent with the company's roots in operations management. BMC Helix certifications in ITSM infrastructure provide coverage for capacity planning, release management, and proactive infrastructure monitoring. GigaOm anticipates that ITIL 4 certification for ITSM business value will follow, though no disciplines in this category are currently certified.

BMC Helix ITSM is part of a portfolio of products. Its underlying microservices architecture serves as the platform for all BMC Helix offerings. It met key criteria with high scores in self-service, knowledge management, and asset discovery as a result of the solution's depth and breadth of functionality. BMC Helix leverages asset discovery tools from BMC's operational capabilities. Workflows necessary for knowledge management integration and self-service are integrated out of the box.

One standout feature found in BMC Helix's change management presents a novel way of assessing the risk of making a specific change. The assessment uses the known state, the change itself, and past history to reach a risk score, which can, in turn, help admins decide whether and when to go ahead with the change. The integration with DevOps and other change-intensive processes is important in fast-changing environments.

Heuristics, AI, generative AI, and ML are used throughout BMC Helix ITSM. They support BMC Helix's self-service and knowledge management value by allowing identification and classification of incidents to assess the risk of making changes, and to improve the chatbots with NLP for all agent and user input.

BMC Helix integrates with popular collaboration tools, including Microsoft Teams. The UI is consistent on mobile devices and when using a web browser on a desktop or laptop computer. There appears to be no limit to the number of items that can be added to the UI, which, though relatively easy to use, can become complicated due to BMC's catalog presentation method when multiple products from BMC are used. This has changed for new customers with the introduction of Digital Workplace Studio in 2021, with its dedicated catalog pages and microsites aligned to personas, job roles, or business units.

Strengths

The entire BMC Helix ITSM suite including ITAM is a well-built ITSM platform with excellent use of AI, NLP, and intelligent heuristics. AI has been put to good use at all levels, and dashboards can be dynamic. Buyers that require customization are able to rely on a data model that enables customization and an upgrade pathway for its on-premises ITSM solution. BMC Helix proactively manages change risk for IT and DevOps by determining impact and criticality. It integrates service and operations management for major incident management and other ServiceOps use cases.

Challenges

As with some other ITSM platforms, increased flexibility provided by BMC Helix does not necessarily lead to ease of use, particularly during the deployment phases. Many modules such as asset discovery are add-on products that are necessary to achieve a comprehensive ITSM solution. As a result, BMC Helix can become a large and sometimes costly solution when multiple modules are needed. Reporting can also be confusing due to the vast amount of information available within the CMDB. BMC has introduced a visual query builder that should help in this regard.

Purchase Considerations

BMC Helix for ITAM is sold primarily as a SaaS-based solution, though the solution can be purchased as an on-premises, containerized deployment as well. The discovery engine is agentless, which simplifies the implementation of the solutions. Buyers should also consider the investment required in processes and best practices as they embark on a purchase of BMC Helix and supporting products.

BMC Helix has use case content developed in a number of market segments including the manufacturing, IT, and energy sectors. The solution enables users to build custom layouts, which facilitates tailoring the solution to a particular use case or customer requirement.

BMC offers an ESM capability to deliver services beyond IT that leverage the ITIL-based ITSM toolset. Examples of enterprise services include HR, facilities, finance, security, customer service, and agile DevOps. The company provides out-of-the-box content for HR, facilities, finance, and security incident handling.

Radar Chart Overview

BMC is positioned as a large enterprise provider with moderate innovation in the Maturity/Platform Play quadrant. The company is a Leader and a Fast Mover that adds features at a steady pace as the market demands. BMC provides a solid solution with little risk for its buyers, having been originally developed several decades ago and updated through ongoing investment in areas such as cloud, AI, ML, and its UI.

Freshworks: Freshservice

Solution Overview

Freshworks was founded in 2010 to challenge the ITSM and ITAM product segments with a more direct approach by delivering its offering as a cloud-based SaaS solution. It was built around the idea that the future will bring the need for a service-first perspective inclusive of ITSM, ITAM, ITOM, and ESM.

Freshservice, Freshworks' ITSM solution, is certified in 14 ITIL 4 practices by PeopleCert. The largest concentration of certifications is in ITSM essentials, with 8 of the 10 practices certified for Freshservice, leaving only IT asset management and service desk yet to be certified. Freshservice has certified availability management, capacity/performance management, monitoring/event management, release management, and service validation in the area of ITSM infrastructure insight. The company has not addressed ITIL 4 for ITSM business value disciplines, perhaps due to the company's focus on the SMB market.

Freshservice has a modern, intuitive interface for its ITSM solution with the process ability to manage problems, incidents, service requests, change, and release management. Knowledge management is also hosted in the cloud and users are able to add solution articles to the database. In keeping with the solution's intuitive approach, the company has employed a gamification approach to improve service technician engagement. Freshservice provides an omnichannel capability to serve users in the way they traditionally work, be it email, MS Teams, Slack, or other channels to reach the service desk. Workflow automation can be achieved with a no-code solution.

Freshservice incorporates AI capabilities in its solution with a functionality called Freddy AI, which has been in use since 2018. It provides domain-specific context, generative AI capabilities, and the ability to interact with IT and non-IT domains. Generative AI supports chatbot conversational mode within its omnichannel messaging environment. Freshservice provides a consolidated platform with no-code workflow automation. Freshworks believes that there will be integration with AI for generating key insights from a multisourced CMDB. This includes identifying potential duplicates and optimizing workloads for cost efficiency. One example is detecting usage patterns in a large AWS server and recommending adjustments, such as upgrading to a larger instance size.

Strengths

Freshservice can handle small to large environments and can transmit service details over low-bandwidth networks. Its UI is up to date and intuitively geared toward smaller organizations. It is one of only two ITSM solutions that incorporate gamification into their UIs. The architecture has multitenant capabilities that were built into the SaaS solution from the ground up. The security model delivered with Freshworks ITSM scored high, providing a multidimensional model of security architecture that includes encryption, perimeter security, and a virtual private cloud. Freshservice has the ability to track remote workers and their devices and ownership using the CMDB and configuration item (CI) definitions, along with the services that are provided to that user, thus reflecting an understanding of location-based service delivery.

Challenges

Freshservice offers knowledge management capabilities; however, only limited automation and AI capabilities are available to streamline managing the KM life cycle. Since the solution is designed around ease of use and simplicity, Freshworks has a limited partner ecosystem that may be an inhibitor for some customers. There is room for growth in using AI to understand the connections between tickets and the connection of assets to services.

Purchase Considerations

The company targets SMB companies seeking an easy-to-use platform with low overhead, and it has an install base of more than 25,000.

Freshservice is offered only on a SaaS-based, multitenant platform and requires no developer support for its rollout to a customer environment. Data centers are located in the US, European Economic Area (EEA), India, and Australia, with customers having control over which data center serves their organization.

Freshservice licenses its product by named users and provides four pricing tiers linked to feature sets. These include AI agent assist, virtual agent, analytics, and a separate business agent license for ESM.

Freshservice is designed to be used by companies in many different vertical markets and does not serve any particular use case. It is a flexible solution and relies on the CMDB to support its ability to handle varying environments.

The company supports ESM with use case examples in HR, facilities, project management, legal management, contract management, finance management, and other corporate domains.

Radar Chart Overview

Freshworks is positioned in the Innovation/Feature Play quadrant of the Radar. Due to the company's unique approach to employing AI and the multisourced CMDB across the areas of ITSM and ITAM, Freshworks is classified as an Outperformer and a Challenger, and GigaOm anticipates Freshworks' pace of innovation will continue into the future.

Halo: HaloITSM

Solution Overview

Founded in 1994, Halo Service Solutions is a private company based in the UK. The company operates in the US, United Arab Emirates, Australia, and the UK. HaloITSM is available to and geared toward all company sizes. Halo works closely in partnership with its customers.

HaloITSM is an integrated solution sold at a single licensing rate. The company aims to speed time to deployment and provides templates, workflows, and processes that can be configured and tailored by the customers.

HaloITSM is certified in 11 ITIL 4 disciplines by PeopleCert. This represents an investment in ITIL 4 best practices and is primarily focused on ITSM essentials, an approach that aligns with the company's interest in streamlining basic ITSM practices. Within ITSM essentials, only asset management and service desk are not certified, leaving the remaining 8 disciplines completely compliant. Release management is the only certification within ITSM infrastructure insight, and limited certification is available in the category of ITSM business value. That said, buyers will be well served to support ITIL-based core ITSM functionality within their organizations.

The solution includes a basic self-service portal that can allow users to submit their own service requests. It includes limited automated workflows that address password reset and access to the solution's knowledge base for resourceful users to identify potential solutions. The knowledge management functionality includes permissions based on user ID.

HaloITSM relies heavily on integrations with third-party, best-in-class solutions. The product does not include its own IT asset management solution. Instead, it has integrations with several external platforms including Solarwinds and Kaseya. For departmental or customer SLA contracts, HaloITSM integrates with the Act and Salesforce customer relationship management (CRM) systems. Change management functionality can be added through Jira, and identity management and SSO with either Centrify or Okta. Similarly, HaloITSM leverages several platforms for remote control, including LogMeIn Rescue and Beyond Trust. Remote control is handled separately.

Strengths
HaloITSM is both flexible and configurable, with an emphasis on ease of use for core ITSM functionality. This allows it to reach the broadest range of potential users possible by providing ITSM essentials ITIL 4 certification in this area. The solution is highly customizable, with all standard settings and samples configurable by users, and provides a graphical interface for customization and cloning with the intent of expanded use. Tickets, custom field additions, and processes are efficient for customers and adapt as organizational changes occur. Halo received high marks for HaloITSM's use of generative AI support through integrations with OpenAI and Azure OpenAI Service.

Challenges
HaloITSM relies heavily on third-party solutions for closely aligned ITSM functionality including SLAs, asset management, and security. This provides high-quality external support for these disciplines but adds the complexity and costs related to managing a multivendor environment. Other challenges include complexity in confirming and testing changes made, due to a steep learning curve for customization.

Purchase Considerations
Halo has the strongest presence in Europe and North America. However, it also has a footprint in other parts of the world.

HaloITSM can be purchased as an on-premises solution or hosted as a SaaS option. The company licenses its product by named and concurrent users. The core product has a single tier or license for ITSM with add-on functionality due to its third-party integration strategy.

The HaloITSM solution is generally applicable across vertical market segments, though it can be found mostly in healthcare, technology, financial services, and telecom. ESM is supported by HaloITSM in a number of different applications that are customizable by the user.

Radar Chart Overview
Halo is positioned in the Maturity/Feature Play quadrant of the Radar. The company leverages existing products with integrations that complement its feature set. It comes to market to provide a straightforward ITSM solution that is highly customized and takes advantage of best-in-class solutions. The solution didn't score highly in the decision criteria we evaluated and is positioned in the Entrant ring.

IFS assyst: IFS assyst ITSM

Solution Overview
Founded in 1983, IFS remains a privately held company based in Linköping, Sweden. The company operates globally with a strong presence in North America and Europe. IFS assyst was acquired from well-established solution provider Axios Systems (f. 1983) in 2021, and now is bundled with supporting applications including asset and endpoint management.

Buyers should rest assured that IFS is committed to ITIL 4 best practice certification. The company is certified in 22 ITIL 4 practices across ITSM essentials, ITSM infrastructure, and ITSM business value. The company's strongest certification is in ITSM essentials, covering all 10 disciplines. GigaOm expects IFS will continue its efforts to support customers committed to ITIL best practices.

IFS assyst is a holistic service management solution, combining ITSM, ITOM, and ESM into a single solution. It incorporates a self-service portal, an automated workflow engine, and knowledge management, all of which leverage basic AI technology at this time with plans for expanded use. Other features include broad functionality inclusive of ITSM, ESM, ITOM, ITAM, service request catalog, SLA management, reporting, and Smart assyst through the solution's chatbot.

IFS assyst brings its users an omnichannel self-service portal with flexible messaging options. Through this portal, users can log trouble tickets, research solutions with the knowledge management capabilities, check status, and view available IT and ESM services. Some messaging channels include a virtual agent that provides conversational AI, live chat, MS Teams collaboration, and mobile app communication. The IFS assyst knowledge management solution currently employs a Lucene search engine to perform global search capabilities. It is built upon knowledge-centered support (KCS) best practices. The knowledge management solution does not currently use AI or ML, though it is planned for the future.

IFS assyst maintains a secure environment for ITSM. SAML authentication is available and can be operated as a SSO secure environment. IFS assyst uses authentication through a SAML mechanism to manage identity using the customer's existing Active Directory environment. Role-based security is also available. All account control remains with the customer.

Workflow development and execution is handled through a component called the process designer. With this tool, ITSM and ESM workflows can be developed, automated, and executed to handle event-driven scenarios that arise in the environment. Orchestration is available to drive, control, and automate all processes as well as to drive actions outside of the system using IFS assyst's API. Process development using the assyst process designer can be used to address any service management function.

Strengths
IFS assyst has shown one of the strongest levels of commitment to supporting ITIL 4 certification and was founded initially around best practices supported in earlier revisions of the solution. It has closely linked ITSM, ESM, and ERP integrative functionality to align corporate business processes with services from IT teams and enterprise wide. IFS assyst is the only vendor currently linking closely to ERP outside of custom integrations and, as a result, scored high in business process integration for ITSM. Finally, the solution has many out-of-the-box templates provided to speed the deployment process in the areas of workflow templates, ESM use case examples, and self-service configuration.

Challenges
IFS assyst's UI is in need of updating and can impact the user experience. For users requiring a special look and feel, tuning and customization will be required and will necessarily increase the deployment expense of IFS assyst. Lastly, OpenTelemetry is not supported within IFS assyst at the present time despite the solution's close alignment with ITOM.

Purchase Considerations
IFS targets the midsize business market and large enterprise environments. IFS assyst can be licensed and installed on-premises or in the cloud as a SaaS solution. Named, concurrent user, and enterprise-wide licensing are all available. For the benefit of the buyer, IFS bundles ITSM, ITOM, and ESM together as a single package.

IFS uses Microsoft Azure as its hosting partner. It provides two major releases each year at roughly six-month intervals. In addition, minor releases or interim upgrades are provided every nine weeks.

IFS has a strong presence in government agencies. In addition, IFS assyst demonstrates capabilities in HR and facilities. It has a presence in manufacturing, utilities, and aerospace and defense (A&D) vertical segments, though it applies across other industry sectors as well.

The company delivers ESM as well as ITSM. ESM can be applied to HR, facilities, procurement, finance, logistics, and other corporate functions through customization.

Radar Chart Overview
IFS assyst is positioned in the Maturity/Platform Play quadrant of the Radar. With the solution having originated in 1983, its feature set and stability are strong. Due to IFS assyst's robust commitment to ITIL 4 and steady advancement of contemporary ITSM features, IFS assyst is classified as a Fast Mover and Leader, indicating steady investment.

InvGate: Service Desk

Solution Overview
Founded in 2008 and based in Argentina, InvGate is a regionally focused company primarily serving Latin America and the US. The company has a local presence in the US, Canada, Mexico, Chile, Colombia, and Spain, and it works with partners in other regions. It targets organizations of over 1,000 employees with its ITSM offering. InvGate's strategy is aimed at creating solutions that help companies modernize their operations quickly and efficiently.

InvGate met table stakes for ITIL 4 certification at the minimum level of five best practices within ITSM essentials: incident management, service request management, problem management, change enablement, and knowledge management. While the company's ITIL 4 commitment is limited in scope, the solution will meet the needs of ITIL 4 organizations focused on basic ITSM functionality.

The InvGate Service Desk is a complete ITSM solution with base-level support for ITIL 4 best practices. The company's portfolio includes two solutions that can operate independently or together for a more comprehensive solution: InvGate Service Desk and InvGate Insight. Many of its customers use both products in tandem, and both are no-code solutions that ease the customization process. Service Desk uses a card-style UI to navigate work, along with agent productivity features, including time tracking and gamification. AI within the solution is based on a proprietary service that leverages Azure OpenAI, Google VertexAI, Llama3, and other AI models, including custom models.

The self-service portal and Virtual Agent in MS Teams offer users a means to interact with the knowledge base and support team. Using the portal, users can create tickets, review status, access the knowledge base, and identify the technician that has been assigned to address the user's issue. The knowledge base will contain IT and non-IT information such as password resets, VPN connections, or any other issues that have arisen and been resolved within the system across the enterprise.

InvGate Service Desk incorporates a workflow builder that is flexible and requires no coding to employ. The product's workflow tool has the ability to collect information via forms from users to make decisions. Additionally, approval can be required at one or more stages along the workflow process. Actionable, multiple-option conditionals and approval steps can be defined using the workflow task notes and may or may not include time restrictions on their performance. The workflow builder incorporates a graphical builder to visualize complex procedures. It also can be used to track progress along the way. Integrations are available with a range of external solutions including identity and access management, collaboration, ITAM, and systems supporting ESM.

Strengths
The InvGate Service Desk solution is intuitive and easy to understand. Buyers will find it simple to use and learn while meeting ITIL 4 standard core requirements. The solution has a modern, updated UI throughout the system. Its knowledge management scored high due to its use of AI. While it requires additional module purchases, InvGate is a complete ITSM platform that incorporates asset, change, and configuration management. This solution is one of a small number of ITSM solutions that have incorporated gamification to support the product's usability.

Challenges
While InvGate offers an omnichannel approach to creating tickets, that does not include social media, and it has some challenges with email server registration. There are also limitations on customization, such as reordering content on the self-service portal. Similarly, there are some functional limits in workflow development.

Purchase Considerations
InvGate was founded in Latin America and has a presence in North America and South America, where the company offers first-party support. It also has commercial teams in Europe and works with a network of partners to provide global reach. The solution can be hosted as a SaaS deployment, purchased as an on-premises solution, or a hybrid deployment. In the case of cloud, InvGate offers hosting in different regions and dedicated servers at an additional cost.

InvGate uses both named and concurrent licensing models. Pricing tiers address varying product feature sets. Roles such as collaborators, approvers, and end users do not require a license.

InvGate can be seen most often in the manufacturing, retail, banking, and healthcare vertical market segments, yet it has applicability across all vertical markets. InvGate supports ESM and has kept a broader perspective on services outside of IT since the product was launched. Many corporate functions can be onboarded and then managed using InvGate Service Desk. Some of these include HR, facilities, security operations, legal management, customer service management, and field service management, and there are customer use cases to support this functionality.

Radar Chart Overview
InvGate ServiceDesk is positioned in the Maturity/Feature Play quadrant of the Radar. It is classified as a Fast Mover because GigaOm anticipates the company will continue a moderate rate of enhancement of its solution. It didn't score as well in the decision criteria we evaluated and is positioned in the Entrant ring.

Ivanti: Ivanti ITSM

Solution Overview
Headquartered in the US with worldwide offices, Ivanti was founded in 2017 by the combination of LANDESK, known for systems management, and HEAT Software, a widely deployed ITSM solution. Leveraging this foundation, Ivanti has continued to add breadth and depth to ITSM and ITAM, as well as security and device management, through its acquisitions of RiskSense, Cherwell Software, MobileIron, and Pulse Secure.

Ivanti is most invested in ITIL 4 certification for ITSM essentials, having certified eight of the modules within this category. Beyond ITSM essentials, Ivanti has certification for ITSM infrastructure insight with certification for availability management, monitoring/event management, and service validation testing; ITSM business value currently has certification only for service financial management and portfolio management. GigaOm expects Ivanti to continue its alignment with Pink Elephant.

Ivanti scored exceptionally well in self-service due to its prebuilt self-service portal paired with an intuitive drag-and-drop interface. Its asset discovery tools also scored well, bringing asset, infrastructure, and graphical service mapping features to the ITSM domain. Auto-discovery is available and the CMDB can be used as the system of record. The ability to adjust the portal's look and feel to reflect customer needs, limit information, and tailor to location adds to its ease of use.

Ivanti Neurons for ITSM leverages Azure OpenAI services for its generative AI capabilities. As such, automation and AI permeate many aspects of the Ivanti solution. For instance, Ivanti Neurons is described as a hyperautomation platform that can self-heal, self-secure, and provide self-service from the cloud to the edge of an enterprise network. Ivanti supplies self-healing automation bots to monitor, maintain, and service the end-user IT environments where its agent can be deployed. These bots identify issues, ask questions, create tickets, automate tasks, and remediate issues preemptively. The bot automation engine uses a codeless workflow interface to modify existing assistant workflows (for security and compliance, user productivity, business continuity, and resource optimization) or to create new workflows. GenAI capabilities are used within knowledge article creation, incident summarization, and other solution areas.

Strengths
Ivanti scored high in the areas of automation, AI, and security for good reason. Ivanti offers self-healing capabilities that restore settings that may otherwise cause widespread outages and result in a multitude of problems and incidents. This self-healing functionality relies on automation capabilities and Ivanti Neurons. The solution also brings its customers robust security capabilities and, due to its LANDESK roots, asset discovery and related systems management support for ITSM. Finally, Ivanti's strategy is forward-looking in that it combines extensive digital employee experience (DEX) insights and IT security workflows with its ITSM and ITAM capabilities. This approach provides an up-to-date perspective for all services across an enterprise.

Challenges
Ivanti Neurons are used across multiple solutions including the vendor's ITSM and ITAM offerings. While they provide additional functionality, they also represent a place where additional planning is needed to adequately take advantage of this functionality, perhaps through the use of professional services with additional cost. Another challenge with Ivanti Neurons for ITSM is that not all products have been integrated into a seamless user experience across the platform, although the company's roadmap indicates its plans to bring more consistency in the future as Ivanti integrates its acquisition portfolio and roadmap.

Purchase Considerations
Ivanti offers native SaaS deployment on Microsoft Azure, except for its FedRAMP offering, which is hosted on Amazon Web Services (AWS). The SaaS offering is fully multitenant and provides testing, staging, and production environments. Ivanti is primarily sold as a SaaS-based solution, and while the company offers an on-premises option, it has more limited functionality and constraints than the SaaS-based license model. Bundling is available.

Ivanti has a large solution ecosystem with a number of IT modules, including security, zero-trust access, patch management, and risk-based vulnerability management. Support for healthcare, human resources, facilities, ITSM, and asset management makes Ivanti a compelling vendor for single-sourcing a number of services.

Ivanti is a broad solution with functionality that includes security, zero-trust access, patch management, and risk-based vulnerability management. It can be applied in verticals broadly and has use cases that demonstrate success in healthcare, education, and financial services. Geographically, Ivanti has a presence in North American and European markets.

ESM capabilities are available for non-IT services. Proven extensions include HR, facilities, project management, security operations, and finance management.

Radar Chart Overview
Ivanti is located in the Innovation/Feature Play quadrant of the Radar and is an Outperformer due to many forward-looking aspects of its feature set and plans for the future. It's a strong Challenger because of its high scores across the decision criteria we evaluated. Part of this positioning is due to the company's incorporation of AI into its solutions over the last three years and integration of solutions into the larger platform.

Matrix42: ITSM & ESM

Solution Overview
Matrix42 was founded in 1992 and is based in Germany. The company offers an integrated ITSM and ITAM solution to a large, diverse group of SMBs and

large enterprises in Europe (primarily Germany) and North America. In 2021, Matrix42 received private investment from Corten Capital to sustain its growth and innovation. Its investment is geared toward increased innovation and expanded geographic reach. Since this time, Matrix42 has strengthened its expertise in service management, SaaS, and AI and expanded its European footprint with the acquisition of the Finnish company Efecte.

Matrix42 has made substantial progress toward meeting the ITIL 4 needs of its customers. With 11 modules certified, Matrix42 supports the vast majority of ITSM essentials, with only service desk and service-level management remaining. Its investment in supporting ITSM infrastructure is approaching 50% completion. GigaOm expects that Matrix42 will continue the process to certify ITSM business value functionality.

As a mature solution, Matrix42 scored high on all key criteria. It uses a single pane of glass to manage all aspects of service management. The solution provides a self-service portal featuring configuration-driven integration with its knowledge base. Automation is in place to help service desk analysts identify relevant background information that supports problem resolution. Knowledge management articles themselves represent a growth area for Matrix42, as they are manually created at this time. One beneficial feature of Matrix42's self-service portal is its complete mapping of the service provisioning process. This is because it also automatically initiates service provisioning drawing from directory services and/or software distribution applications and leverages the use of CIs in the CMDB.

SSO is included. Better-than-average features include AI/ML integration, ease of use, and the manageability of the SaaS offering. Professional services are available for customers requiring assistance. Matrix42 addresses atypical use cases through customization, ensuring it can meet customer needs for innovation through customization of integrations with the solution and the ability to integrate with best-of-breed solutions. The company guarantees that such customization will follow upgrades to core product revisions over time. These customizations can be accommodated with low- or no-code solutions and by the customer or through third-party service offerings.

Strengths
Matrix42 has a presence in Germany, France, Italy, and Spain, and with the purchase of Efecte, it will add northern markets such as Finland and Sweden. The product has already moved to ITIL 4, placing it further down the path than many vendors in transitioning to the newer framework. With recent investments, the company has begun innovating to support its digital workspace positioning by building on its established ITSM and asset management technologies. Matrix42 ITSM employs Kubernetes cluster technology as a strategy for scaling, operations, and automated deployment to benefit its platform and its customers. Matrix42 brings together a unique combination of solutions encompassing ITSM, software asset management, the service catalog, and a strength in UEM that informs ITSM.

Challenges
Customers are able to customize their own solutions through settings, configurations, and parameters. Yet, optional professional services are typically used for complex deployments delivered by Matrix42 or one of its partners, which increases the cost of implementation. Matrix42 is working to triage the need for increased SaaS offerings while maintaining an outstanding reputation for on-premises solutions. Customers are seeking more cloud solutions for rolling out enterprise-class tools despite being content with Matrix42's on-premises offering.

Purchase Considerations
Matrix42 offers on-premises, public cloud, or hybrid deployment. The company also offers company management of the deployment. Language localization is part of the Matrix42 solution, and the company offers 12 languages including German, English, Spanish, French, and Italian. The company's support and corporate headquarters remain in Germany except where partners are supporting a specific geographical region.

Buyers wanting a tightly integrated ITSM and ITAM solution from a single vendor will be attracted to Matrix42's approach to pricing, packaging, and integration of these solutions. Likewise, buyers focused on endpoint management and the expertise that comes from beginning with the end device in mind will appreciate Matrix42's "roll up your sleeves" approach to this ITOps function that supports ITSM.

Matrix42 ESM leverages the ITIL 4 certified value chain and process automation to meet the needs of corporate services outside of ITSM, and it can be used across all industries. It serves as the orchestration layer that helps customers evolve from cost centers to profit centers. Matrix42 uses enterprise queue management to separate data for ESM. The emphasis of this capability is on both security and data separation, where necessary.

Radar Chart Overview
As a provider of a consolidated ITSM and ITAM solution, Matrix42 is positioned in the Maturity/Platform Play quadrant near the Feature Play side of the chart. Matrix42's investment in ITIL best practices is evident in its connections among service modeling, provisioning, and requirements for ITAM. Matrix42 is a Fast Mover, adopting new technologies at a moderate pace compared to the market.

ManageEngine: Service Desk Plus

Solution Overview
ManageEngine is a division of ZOHO Corp. Founded in 1996 and previously known as AdventNet Inc., ZOHO Corp. is headquartered in the US with offices in North America, Europe, and Asia. ManageEngine provides solutions for service management, asset management, IT operations, and security. The solution provides out-of-the-box templates, automated workflow, no-code customization, and AI capabilities to improve efficiencies.

ManageEngine met table stakes for ITIL 4 certification at the minimum level of five best practices within ITSM essentials. PinkElephant certified ManageEngine IT asset management, change management, incident management, problem management, and request management. This level of certification will meet the needs of ITIL 4 organizations focused on basic ITSM functionality. GigaOm anticipates ManageEngine will continue the certification