

IT Market Clock for ITSM 2.0, 2016

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Digital business drivers require I&O teams to deliver greater capabilities at higher-efficiency levels of agility, resilience and responsiveness. I&O leaders must understand functionality and commoditization across a broad array of ITSM 2.0 tools to keep their tooling strategy aligned to business.

Key Findings

- Few I&O leaders have ITSM 2.0 tooling strategies that are well-aligned with current commoditization and useful life expectations.
- The market for ITSM 2.0 tools offers I&O leaders with a broad array of established and emerging capabilities.
- Digital business needs such as agility and quick response, new tooling capabilities, and shifts in the market landscape require that I&O leaders evolve their ITSM 2.0 tooling strategies.
- Early adoption of emerging ITSM 2.0 tools requires a focus on business value and an appropriate level of risk tolerance.

Recommendations

- Evaluate current ITSM 2.0 tooling capabilities and plans against this research to identify opportunities and gaps.
- Select emerging ITSM 2.0 capabilities for potential high-impact areas and align adoption to your specific risk tolerances.
- Construct an ITSM 2.0 tooling strategy consistent with market commoditization and useful life expectations.
- Update ITSM 2.0 tooling strategies regularly to accommodate shifts in market drivers, tool capabilities and supplier landscapes.

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Analysis

What You Need to Know

The IT Market Clock for IT Service Management (ITSM) 2.0 provides information and advice on tools and technologies that improve effectiveness and efficiencies of IT service management practices. Initial ITSM 2.0 tool use often starts with the IT service desk and basic incident, request and change

management. With maturity, organizations further leverage advanced tool capabilities. IT service support management (ITSSM) tools that enhance support by automating tasks and workflows are the core of ITSM 2.0. Digital enterprises, however, are increasingly expecting their infrastructure and operations (I&O) organizations to transform from a reactive to a proactive service orientation. In this context, other components, such as IT service portfolio and catalog tools, are often leveraged. Additionally, tools for software asset management (SAM), IT financial management (ITFM) and business value dashboards (BVDs) enable I&O leaders to manage IT services in a more cost-efficient and business-value-focused manner.

I&O leaders should leverage the information provided in the IT Market Clock for ITSM 2.0 to:

- Plan for adoption of new technologies, considering latest business priorities like digital initiatives and available emerging and adolescent technology options.
- Establish roadmaps for replacement and upgrade of existing technology assets.
- Make informed decisions on asset utility and warranty, life cycle cost benefit, contract duration and review cycles.
- Prioritize resources and efforts invested when making ITSM tooling decisions.

The IT Market Clock

The IT Market Clock for ITSM 2.0, 2016 illustrates the relative market maturity and commoditization levels for the major ITSM 2.0 technology asset classes (see "Gartner's IT Market Clock: Methodology Definition" and "How to Use Gartner's IT Market Clocks").

In its early stages, a specific ITSM 2.0 technology asset's use is primarily limited to early adopters. The value it delivers is available to only a few, and it usually is highly differentiating, commanding a higher price. The rate of innovation will likely be high, as will the level of skills needed to fully exploit the class of assets. Given the embryonic state of these technologies, there is risk: The business benefits expected are at higher risk of not being fully realized.

When successful customer benefit realization leads to a rise in demand, supply choices also expand; processes become standardized and the skills required to exploit the technology become more readily available — so costs tend to fall. This leads the technology to enter a "mass-customized phase," during which it becomes semi-industrialized — typically consisting of standardized modules or components that require some customization in deployment to meet the needs of buying organizations. If the rate of demand and supply grows rapidly for these technologies, it may mean standards will change rapidly and solutions may become costly. Enterprises should monitor supply choices closely to ensure that they maximize discounts. During this period of market evolution, clients find strategic advantage through choice of supplier and/or delivery model.

As the technology matures, the level of choice will continue to grow and the skills required to use it cease to command a premium price. Products and technologies from competing suppliers become more functionally equivalent, making it easier to switch among them. The asset class will be at its



most commoditized; price competition will be at its greatest. In the commoditized phase, switching costs, prices and margins for suppliers reach their minimum levels.

Higher levels of commoditization typically lead to market consolidation, as scale becomes a requirement for profitably delivering products or services under growing price pressure. Consolidation is often a feature of the market in this phase, leading to a reduction in choice and a stabilization in the price and availability of appropriate skills and support.

Where competition is not evident due to patent protections or other barriers to market entry, the availability of the appropriate skills and support from adjacent products will decline, as technology assets approach the end of their support lives. The result is a final phase of market development, during which the level of commoditization for the asset class decreases. Prices rise because of reduced supplier choice or declining availability of the skills needed to maintain and run the products concerned. Continued innovation within technology classes may delay the onset of the later, highly commoditized phases of the IT Market Clock.

As can be seen in Figure 1, 13 asset classes are included in the Market Clock for ITSM 2.0, with eight clustered in the Advantage and Choice phases. The others are spread across the following two phases. This positioning reflects that the ITSM market combines new tool options as well as evolving technologies. This pattern reinforces the need for I&O leaders to regularly re-examine their ITSM 2.0 tooling strategies.





Source: Gartner (August 2016)

Useful Market Life

For each technology asset class, market life is a relative measure of where the asset class sits within its own life cycle. Measures are stated using the metaphor of a 12-hour clock face, and the full market lifetime of delivery comprises one complete 12-hour cycle, from 12:00 until 12:00.

The market life has four phases:

Advantage: From 12:00 to 3:00, the market typically moves from an emerging status to adolescent status. Levels of demand and competition are typically low, so the technology is procured for what it delivers, not for its placement in its own market.



- Choice: From 3:00 to 6:00, the market typically moves from an adolescent status to early mainstream. This is the phase of highest-demand growth, during which time the supply options should grow and prices fall at their fastest rate.
- Cost: From 6:00 to 9:00, the market moves from early mainstream to mature mainstream status. During this phase, commoditization is at its highest level, and costs will be the strongest motivator in most procurement decisions.
- Replacement: From 9:00 to 12:00, the market moves from mature mainstream status through legacy and to market end (after which, the technology is no longer viable to procure or use).
 Procurement and operating costs will steadily rise, and enterprises should seek alternative approaches to fulfilling the business requirement.

The market life positions of technology asset classes are based on a consensus assessment of technology and market maturity. Some asset classes also appear in Gartner Hype Cycles, the span of which covers adoption of up to 20% to 50% market penetration, which equates to approximately 5:00 on the IT Market Clock.

Commoditization

Commoditization is shown on the IT Market Clock as the (radial) distance from the center of the clock: The farther toward the outside an asset class is, the more commoditized it is. Commoditization is evaluated on a scale of four to 20, with 20 being the maximum level of commoditization. Commoditization is the sum of three measures:

- **The level of standardization:** Determines the potential ease with which the product or technology can be interchanged; hence, it is the buyer's potential capability to exercise choice.
- **The number of suppliers:** Defines the range of choice available to buyers; hence, this is their chance to take advantage of the interchangeability/interoperability yielded by standardization.
- Access to appropriate skills: Every product and technology requires some level of internal capability to use it. The ease with which these capabilities can be obtained and augmented directly affects the internal cost of switching suppliers.

Levels of Standardization

Table 1 summarizes the scores corresponding to the different levels of standardization.

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| Table 1. Summar | y Measures o | f Standardization |
|-----------------|--------------|-------------------|
|-----------------|--------------|-------------------|

| Score | IT Hardware | IT Software | IT Services |
|-------|--|--|---|
| 10 | Open standards, broadly based and enforced | Highly componentized. Most interfaces conform to codified or open-standard definitions. Covered by free/low-cost licensing or Open Source Initiative (OSI) recognized open-source license agreement. | Significant cross-supplier adoption of common technology and processes. Many codified or open standards. |
| 8 | Open standards, embraced in core areas | Componentized. Interfaces for core functionality conform to codified definitions. Covered by free/low-cost licensing or OSI- recognized open-source license agreement. | Limited cross-supplier adoption of common technology and processes. Some codified or open standards. |
| 6 | Commercial standards, embraced in core areas | Partly componentized. Mix of open and proprietary formats and interfaces to functionality. | Cross-supplier adoption of common technology and processes. Some codified commercial standards. |
| 4 | Limited commercial standards | Not componentized. Proprietary file formats. Interface through published proprietary APIs. | Limited cross-supplier adoption of common technology and processes. |
| 2 | Proprietary technology employed by each leading vendor | Limited interoperability with competing products. Proprietary file formats and no published APIs. | Proprietary technology and/or processes employed by each leading supplier. |

Source: Gartner (August 2016)

Level of Supplier Choice

Table 2 summarizes the scores corresponding to the levels of supplier choice.

| Table 2. | Scores | for the | Number | of Available | - Suppliers |
|----------|--------|---------|------------|--------------|-------------|
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| Score | Number of Suppliers |
|-------|--|
| 5 | Five or more suppliers |
| 4 | At least three geographically overlapping suppliers; consistent level of choice in all geographies |
| 3 | Three major suppliers, nonoverlapping |
| 2 | Two suppliers |
| 1 | Single supplier |

Source: Gartner (August 2016)

Ease of Access to Appropriate Skills

Table 3 summarizes the scores corresponding to the levels of skills availability.

| Table 3 | 3 Eva | luating | Access | to A | nnro | nriate | Skills |
|---------|--------|---------|---------|------|-------|--------|--------|
| | J. LVU | iuuung. | 1000000 | .07 | vppio | priato | ORINO |

| Score | Access to Skills |
|-------|--|
| 5 | Skill levels reduced and becoming part of general skill set. |
| 4 | Skills readily available. Costs falling. |
| 3 | Supply and demand for skills balanced. Stable costs. |
| 2 | Skills in short supply. Situation improving (demand falling and/or supply increasing). |
| 1 | Skills in short supply. Shortage set to stay same or worsen. |

Source: Gartner (August 2016)

Market Life and Commoditization Measures

Figure 2 summarizes the market life position, as well as the commoditization scores for each asset class.

Figure 2. Market Life and Commoditization Measures

| | | Co | ommoditizatio | on | |
|-------------------------------------|----------------------------|-----------------|---------------|---------------------|-------|
| Asset Class | Position in Market Life | Standardization | Suppliers | Access to Skills | Total |
| Business Value Dashboards | 0:45 | 4 | 5 | 2 | 11 |
| Software Asset Management | 1:00 | 2 | 4 | 1 | 7 |
| Unified Endpoint Management | 1:00 | 4 | 3 | 3 | 10 |
| IT Financial Management Tools | 3:10 | 4 | 4 | 3 | 11 |
| IT Service View CMDB | 4:00 | 4 | 4 | 2 | 10 |
| IT Service Dependency Mapping Tools | 4:15 | 4 | 5 | 2 | 11 |
| ITSSM Tools | 4:30 | 6 | 5 | 3 | 14 |
| EMM Suites | 5:00 | 6 | 5 | 4 | 15 |
| User Personalization Management | 7:00 | 6 | 5 | 2 | 13 |
| IT Service Catalog Tools | 7:30 | 6 | 3 | 3 | 12 |
| Knowledge Management Tools | 9:30 | 2 | 4 | 1 | 7 |
| Client Management Tools | 9:45 | 10 | 5 | 4 | 19 |
| Business Service Management Tools | 10:00 | 4 | 5 | 1 | 10 |

Source: Gartner (August 2016)

IT Market Clock Changes for 2016

New for 2016

Software asset management (formerly software license optimization and entitlement)

Off the IT Market Clock

- IT operations analytics toolsets
- IT asset management

Phase Changes

- IT service catalog tools has moved from the Advantage phase in 2015 to the Cost phase in 2016.
- IT financial management tools has moved from the Advantage phase in 2015 to the Choice phase in 2016.
- Knowledge management has moved from the Advantage phase in 2015 to the Replacement phase in 2016.
- Client management tools has moved from the Cost phase in 2015 to the Replacement phase in 2016.

Other Changes

Software license optimization and entitlement (was renamed software asset management)

IT Market Clock Recommendation Summary

This summary (see Figures 3 and 4) is a companion to the 2016 IT Market Clock for ITSM 2.0. It maps each asset class by current market life status and expected change in an easy-to-read grid format. Each element is color-coded by priority of the actions required:

- Recommendations that should be acted on within the next 12 months
- Recommendations that should be acted on within 24 months
- Recommendations that are less urgent

Figure 3. IT Market Clock Recommendation Summary, Part 1

| Items | Focus Now | Next Change | Recommendations |
|--|-----------|--------------------------------|--|
| Business Value Dashboards | Advantage | Choice in 2 to 5 years | Obtain IT and LOB executive support for an incremental BVD initiative. Determine and document the data and analytical techniques required, then beta test manual BVDs. |
| Software Asset Management | Advantage | Choice in 0 to 2 years | Use existing software and hardware inventories. Select a SAM tool based on its ability to support licensing models across the entire software portfolio. |
| Unified Endpoint Management | Advantage | Choice in 2 to 5 years | Users procuring Wave 1 device management products should plan on shifting to Wave 2 products within three years, as long as those products have a path toward Wave 3 in five to seven years. |
| IT Financial Management Tools | Choice | Cost in 5 to 10 years | Consider ITFM tools to capture, analyze and report a comprehensive picture of IT costs in multiple views. Be willing to invest in the processes and resources required. |
| IT Service View CMDB | Choice | Cost in 2 to 5 years | Identify your CMDB goals and metrics by determining how an improvement in IT operational processes can produce or improve a specific business goal for a defined user community. |
| IT Service Dependency Mapping Tools | Choice | Cost in 2 to 5 years | Companies considering SDM should evaluate the vendor's roadmap to ensure there is a focus on emerging technology requirements. |
| IT Service Support Management Tools | Choice | Cost in 2 to 5 years | I&O organizations that plan on achieving or retaining Level 1 or Level 2 I&O maturity should consider basic or intermediate tools. Those with Level 3 I&O maturity within the next 18 months should consider advanced ITSSM tools. |
| Enterprise Mobility Management Suites | Choice | Cost in 2 to 5 years | Identify critical policy controls and mobile use cases, and evaluate the EMM functions most critical in addressing those requirements. Train your users at the time of deployment. |
| User Personalization Management | Cost | Replacement in 2 to 5 years | Choose products based on objectives, and revise choices every 18 months. |
| IT Service Catalog Tools | Cost | Replacement in 0 to 2 years | Develop an IT service portfolio first, and internalize the distinctions among services, processes, products and platforms. For each service catalog entry, define the service delivery process workflow steps and milestones for tracking success. |

Key:

Recommendation should be acted on in 12 months

Recommendation should be acted on in 24 months

Recommendation is less urgent

Source: Gartner (August 2016)



| Figure 4. I | IT Market | Clock | Recommendation | Summarv. | Part 2 |
|--------------|-----------|--------|-------------------|------------|--------|
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| Items | Focus Now | Next Change | Recommendations | | | |
|---|-------------|--------------------------------|---|--|--|--|
| Knowledge Management Tools | Replacement | End of Life in 0 to 2 years | KM tools should be an integral part of an I&O strategy, whether through stand-alone options or as part of an ITSSM suite. Integration is necessary to reap the benefits of a knowledge base, and buyers should assess which platform best suits their needs. | | | |
| Client Management Tools | Replacement | End of Life in 2 to 5 years | IT organizations will benefit most from client management tools when standardization and policies are in place before automation is introduced. Although these tools can significantly offset staffing resource costs, they often require dedicated resources to maintain the product | | | |
| Business Service Management Tools | Replacement | End of Life in 0 to 2 years | Focus on developing significant operational maturity across all dimensions — people, process and technology — so that IT operates in a service-aligned manner. Explore ITOA tools, and specifically the capability to provide service-dependency maps in conjunction with other discovery-oriented tools. | | | |
| Key: Recommendation should be acted on in 12 months Recommendation should be acted on in 24 months | | | | | | |
| Recommendation is less urgent | | | | | | |

Source: Gartner (August 2016)

Market Background

The ITSM 2.0 IT Market Clock drivers combine more traditional IT operations drivers with newer digital-business-era influences. Highlights of these influences are outlined below:

- The digital priorities from businesses are forcing I&O to switch to bimodal IT thinking. Consequently, I&O leaders are striving to improve the maturity levels of their organizations along traditional lines, while also seeking to establish newer, more agile capabilities leveraging DevOps.
- The new initiatives have made cost-efficiencies of service delivery and support even more relevant, as additional financial bandwidth is not always necessarily available to I&O to support the new activities.
- The Nexus of Forces, including cloud adoption, are a dominant trend in a digital business environment, putting more emphasis on demonstrating business value at a dynamically optimized cost level.
- The adoption of new technologies and service delivery models, while retaining more traditional infrastructure approaches, is driving many organizations toward both the hybrid IT world and the search for tooling capabilities that span across different service delivery models.
- User expectations for speed, quality and responsiveness for their IT service and support requirements are increasingly based on their personal consumer and mobile device user



experiences. This is pushing I&O leaders to renovate frontline IT support models with the goal of improving levels of client satisfaction.

While this influence list is not exhaustive, it is clear that traditional factors pushing this market are now joined with a new wave of influences, driving I&O leaders to revisit traditional tooling strategies.

Supplier Landscape

The ITSM 2.0 market combines a well-known set of vendors, including BMC, CA Technologies, Hewlett Packard Enterprise (HPE), IBM and Microsoft, with a wide array of newer emerging suppliers primarily focused on offerings in the Advantage and early Choice phases of the IT Market Clock. As the assets progress from the early phases, the supplier landscape also shifts. This again reinforces the need for I&O leaders to regularly reassess their ITSM 2.0 tooling and supplier strategies.

Asset Class Profiles

Advantage Quadrant

Business Value Dashboard

Definition: Business value dashboards comprise audience-specific sets of business value metrics that are most commonly delivered through presentation and visualization mechanisms. They help communicate the business value of I&O to business leaders. The collaboration between business and IT leaders is both critical and core to BVDs, and has the potential to balance tactical and strategic investments across people, process and technology. BVDs spark the insights needed to optimize I&O decisions that support the enterprise's strategy and goals.

Trend Analysis: The I&O BVD market is nascent, but growing. Gartner continues to see interest from clients to present data that is relevant to business leaders. However, successful adoption of a true BVD requires organizational maturity (near Level 3 and above in the ITScore for Infrastructure and Operations [ITSIO]) to ensure it can truly measure value. The maturity prerequisite may result in many organizations finding limited success in their initial attempts at creating BVDs.

BVDs can be built utilizing capabilities from many IT operations management (ITOM) tools; but producing business metrics, such as impact to revenue, cost and risk, is elusive because business-level understanding is often lacking within I&O. Therefore, a subset of tools meeting the requirements of I&O BVDs has emerged, focusing on their out-of-the-box ability to jump-start an I&O organization's BVD program.

Vendor attention to this technology has increased since last year, due in part to merger and acquisition activity in this sector (PureShare was acquired by TeamQuest, Xtraction Solutions was acquired by Landesk and eMite was acquired by Prophecy) and the entry into this market by a large vendor, Hewlett Packard Enterprise.

Time to Next Market Phase: Two to five years

Business Impact: BVDs have the potential to positively impact the business's perception of IT across all verticals, due to their foundational nature of communicating value (via I&O's ability to impact revenue, costs and risks). At the heart of BVD initiatives is that BVDs help to justify and target investment where it can have the greatest impact on business outcomes. Collaboration between business and IT leaders results in redefining the performance measurement of I&O, which will result in potentially dramatic shifts of both tactical and strategic investments across all dimensions of I&O (people, process and technology). This BVD-initiative-fostered collaboration (in addition to that of similar alignment initiatives) has the potential to generate the insights needed to discover new ways of doing business and new business opportunities.

User Advice: I&O teams should take the following pragmatic, stepwise approach to start clearly demonstrating their positive impact on business priorities:

- Step 1: Obtain key IT and line of business (LOB) executive support for an incremental BVD initiative.
- Step 2: I&O leaders should collaborate with LOB partners to determine the agreed upon goals and measurement criteria for the dashboard.
- Step 3: Determine and document the data and analytical techniques required to deliver BVD metrics.
- Step 4: Beta test manual BVDs with a subset of the intended audience, incorporating feedback.
 Alternatively, pilot a BVD solution from an independent software provider.
- Step 5: Opportunistically select, implement and evolve tooling.

As the steps illustrate, the BVD construction process depends on collaboration and broad support to measure the impact of I&O activities on the business, as defined by the business, and not by what data is easily available or what I&O teams use for technical optimization. It is also critical that BVD initiatives be treated as parts of, not substitutes for, larger strategic business alignment efforts.

Sample Vendors: 1-Page; eMite; Execview; HPE; Landesk; Northcraft Analytics; TeamQuest; Vyom Labs; Westbury

Software Asset Management

Definition: Software asset management tools automate many of the tasks required to maintain compliance with software licenses and to optimize software spending. SAM tools facilitate in-depth analysis of software license position by integrating software inventory information, automating collection of software consumption data, evaluating software license entitlement to establish an effective license position (ELP), and highlighting opportunities to minimize risks and optimize costs.

Trend Analysis: SAM tools replace manual spreadsheets as the tool of choice for managing software license entitlements. The rising diversity and complexity of software licensing schemes now requires an automated solution that accelerates and improves upon manual processes. Obstacles to successful SAM tool adoption include IT maturity (lack of process adherence), limited sources of software license consumption data, weak support for cloud and virtual platforms such as

SaaS, variable support for data center software applications, and complexity of implementation. Although these factors will be overcome in time, the relative newness of the technology itself represents the most significant inhibitor to the successful leveraging of SAM tools. I&O teams lack experience with SAM tools and the maturity to apply license management discipline, but are learning how to define requirements and integrate SAM tools with existing systems to achieve success.

Time to Next Market Phase: Zero to two years

Business Impact: SAM tools move past managing licenses for compliance to optimizing license consumption to reduce software spending. Optimization guides ideal license deployment to reduce spending. All industries (commercial, governmental, and so on) need to reduce audit risk and control or reduce software spending, and SAM tools provide a new means of doing both. Gartner expects strong continued adoption with enterprises that want to scale and automate software license management for compliance and spending controls.

User Advice: SAM tools depend on license consumption data to establish an ELP. To get started producing ELPs with a SAM tool, use your existing software and hardware inventories. You will require out-of-the-box integrations for your inventories and discovery tools. Verify integrations with configuration management database (CMDB) tools as well. Run manual sample tests to ensure that inventory data is clean and accurate, and that its sources are reliable.

Select a SAM tool based on its ability to support licensing models across the entire software portfolio. Focus on cloud-based, virtual and mobile applications, as well as traditional software. Confirm that the SAM tool's software identification library updates regularly. Aim to future-proof your purchase by choosing tools that conform to the international standard for SAM (ISO-19770).

As organizations implement bring-your-own-device programs, give consideration to managing any corporate software or cloud application or service that is installed or accessed on the endpoint when there isn't a discovery tool installed on the endpoint. Given the diversity of SAM tool vendors, we recommend a low-risk proof of concept (POC) pilot be used to ensure the SAM tool will operate as expected, prior to wider deployment.

Sample Vendors: 1E; BMC; Eracent; Flexera Software; HPE; Scalable Software; Snow Software

Unified Endpoint Management

Definition: Unified endpoint management (UEM) is the use of a common set of tools and processes across PCs, smartphones and tablets. UEM applies the smartphone and tablet paradigm to a wider set of devices, most notably PCs. UEM includes the technologies of enterprise mobility management (EMM) and client management tools (CMTs).

Trend Analysis: PCs (for example, Windows and Macs) possess an open file system architecture, which allows (but also requires) CMTs and processes to perform a wide range of management tasks, including provisioning, inventory, software distribution, patching, configuration management and IT support. Mobile devices (for example, iOS, Android, Windows Phone) introduced the sandboxed architecture, in which applications are isolated, with the OS providing enterprise



management APIs to EMM suites. Windows 10 and Mac OS X are transitioning to the sandboxed application architecture, and as a result, are transitioning to the EMM suite management architecture as well. However, classic Windows and Mac applications are entrenched in organizations, which requires organizations to use CMTs for some devices and EMMs for others.

UEM solutions allow organizations to manage their devices through a single management tool. Convergence will happen in three waves over the next three to five years:

- Wave 1: Different Vendors and Products: Organizations use different vendors and products to manage mobile devices and PCs.
- Wave 2: Consolidated Endpoint Management: Organizations use a single vendor product set, but with different processes and workflows, to manage mobile devices and PCs.
- Wave 3: True Convergence: Organizations use the same technologies and processes to manage PCs and mobile devices.

In Wave 3, the products (not just the vendors) and the processes for managing PCs, smartphones and mobile devices will become the same. Organizations may accelerate this change by running Windows applications remotely in a server-based computing or hosted virtual desktop (HVD) environment, while managing all endpoint devices via EMM controls on the devices.

UEM has progressed significantly over the past year. Windows 10 and Mac OS X have added significant enhancements to their management capabilities to help facilitate UEM. Over the past year, Microsoft added a large number of Windows 10 mobile device management (MDM) APIs along with new ways of provisioning Windows 10 systems. Apple continues to enhance its OS X MDM APIs as well. Still, the persistence of Win32 applications and a continued need for many organizations to use Active Directory Group Policy will keep organizations in Wave 1 and Wave 2 for the next several years.

Time to Next Market Phase: Two to five years

Business Impact: The third wave of UEM represents the disruption of processes and tools that organizations have used for 15 to 20 years. It will require significant re-engineering of process. However, there are several benefits to UEM:

- The UEM architecture allows organizations to more easily manage their endpoint OS platforms, which are continuously updating.
- It allows organizations to support a wider range of devices, as UEM does not require managing images or device drivers.
- It will reduce the total cost of ownership (TCO) of managing endpoint devices by simplifying device management and support processes.
- It reduces the number of tools required to manage the entire portfolio of endpoint devices.

User Advice: Users procuring Wave 1 device management products, referred to as MDM, EMM and CMT, should plan on shifting to Wave 2 products within three years, as long as those products have

a path toward Wave 3. Identify the right use cases for EMM today, such as bring your own PC (BYOPC), self-supporting users and users with few Win32 applications.

Sample Vendors: IBM; Landesk; Matrix42; Microsoft; VMware (AirWatch)

Choice

IT Financial Management Tools

Definition: IT financial management tools are IT-owned and -managed financial tools that provide IT leaders with multiple views of IT cost data and analytics to support strategic decision making, financial planning, budget justification, chargeback/showback, performance analytics, benchmarking and measurement capabilities. These tools collect cost- and consumption-related data in both heterogeneous and complex IT environments, and enable the building of cost models with dynamic cost allocation and reporting capabilities.

Trend Analysis: ITFM tools provide IT leaders with the financial management means to "run IT like a business." Gartner has seen an increase in interest and adoption of these to support IT cost optimization, showback, chargeback and effective cost transparency. Increased interest in cost optimization, service-based costing and the need to provide greater IT cost and value transparency continue to drive market growth at an estimated annual rate of 15% to 20%. Vendors continue to enhance and refine their offerings — including the addition of simplified cost models, data acquisition and reporting/analysis enhancements. New and regional vendors continue to gain traction. Vendors in adjacent markets like corporate performance management, telecom expense management, cloud expense management and IT operations analytics are poised to enter the ITFM space.

Time to Next Market Phase: Five to 10 years

Business Impact: ITFM tools enable an IT organization to make better business decisions. With a complete view of IT costs, and the ability to model costs into different views, organizations can compare ROI and cost-per-performance data on new initiatives, while managing demand for current offerings. By understanding the costs of the IT services that the business requires, IT leaders are better able to show value in an increasingly competitive IT marketplace.

However, the adoption of ITFM tools by many IT organizations may be at risk due to the complexity, cost, and time- and resource-intensive nature of ITFM tool implementation. The IT maturity level required to successfully drive an ITFM initiative is also high and can impact success (Level 3 or higher is ideal). The growth in the market indicates that the ITFM market is solidly in the early mainstream phase of market development. The most common disconnects between client expectations and promised value are the clarity of ITFM project mandate and expectations and the skills and commitment of the teams tasked with owning an implementing a solution.

User Advice: The value of quality IT financial data for IT services should not be underestimated. A good ITFM implementation will enable more strategic IT decision making. Given that most corporate financial systems lack the granularity and flexibility that IT operations require, and spreadsheets lack the desired features, reporting and historical context, a more robust solution is required. When

properly implemented and maintained, ITFM tools can provide the business with improved cost optimization, transparency to external stakeholders, demand management of critical IT resources and an indication of IT financial compliance to efficiency requirements. Most IT organizations will require significant operational and financial changes to become trusted service providers to the business. Aligning IT operations to define and provide business-valued services — as opposed to managing technologies, understanding cost drivers and providing transparency of IT costs and value delivered — will be key.

IT leaders should consider ITFM tools to capture, analyze and report a comprehensive view of IT costs in multiple views, including by assets, general ledger categories, investment models and services delivered. As IT moves toward a shared-service delivery model and external sourcing in an increasingly complex computing environment, these tools will enable more responsible and accurate financial management of IT. However, users must be willing to invest in the processes and resources required, including dedicated ITFM capabilities, to maximize the successful implementation of these tools.

Sample Vendors: Apptio; ComSci by Upland Software; Nicus Software; ServiceNow; VMware

IT Service View CMDB

Definition: An IT service view configuration management database is a repository with four functional characteristics: IT service modeling and mapping, integration/federation, reconciliation, and synchronization. It provides a consolidated configuration view of selected sources of data (discovered or manually documented), which have been integrated and reconciled into a single IT service view.

Trend Analysis: IT service view CMDBs continue to see increased interest and adoption within I&O organizations. CMDBs combine a subset of inventory content with contextual information to facilitate decision making. They are most useful for change impact assessment, event and incident correlation, and disaster recovery planning. However, many CMDBs lose effectiveness over time. While the majority of CMDB efforts have failed to meet expectations, many who fail at them try again. The most significant obstacles to successful CMDB adoption include process governance and new technologies. Overcoming these obstacles requires increased management intensity, as well as new approaches to discovery. Failure to govern changes and update configurations render CMDBs inaccurate. Many organizations are renovating their CMDBs to remove content not related to improving business outcomes. Cloud, mobile and virtual assets with variable lifespans also challenge CMDBs. Augmenting the traditional "bottom up" discovery are improved top-down discovery and new event-driven discovery approaches.

Time to Next Market Phase: Two to five years

Business Impact: An IT service view CMDB provides insight into and visibility of key peer-to-peer and hierarchical relationships in IT services. Such insight improves IT decisions in nearly all areas of IT operations. An IT service view CMDB is foundational to improving IT service support and delivery, and to reducing time to value for new and changed IT applications and services. A successful CMDB improves risk assessments of proposed changes and can assist with root-cause analyses. It can aid in compliance, asset management, disaster recovery, data center consolidation and enterprise architecture gap analysis. However, the two most predominant use cases continue to focus on improving change impact assessment and root-cause analysis.

User Advice: A CMDB is only valuable when it improves IT operational processes — such as incident, problem, change and release management — that support business projects, applications and services. Improve your likelihood of success by deriving your CMDB goals, critical success factors (CSFs) and key performance indicators (KPIs) from business improvement goals. Identify your CMDB goals and metrics by determining how an improvement in IT operational processes can produce or improve a specific business goal for a defined user community. Enterprises that lack change and configuration management processes are likely to establish inventory data stores that don't represent real-time or near-real-time data records, and will have a difficult time developing a trusted IT service view CMDB. Only data with ownership and a direct effect on a goal should be in the IT service view CMDB configuration models. Federate other data — for example, keeping financial data in an ITFM tool; software license information with SAM or IT asset management (ITAM) tool; and incident tickets with the IT service desk. Evaluate key data sources as part of the POC for the IT service view CMDB selection.

Sample Vendors: Axios Systems; BMC; CA Technologies; EasyVista; HPE; IBM (Tivoli); ServiceNow

IT Service Dependency Mapping

Definition: IT service dependency mapping (SDM) tools discover, snapshot and track configuration relationships by creating maps of dependencies among infrastructure components (for example, servers, networks and storage) and applications in physical, virtual and cloud environments to form an IT service view. Key differentiators are breadth of maps and depth of discovery across different environments.

Trend Analysis: Many inventory and discovery tools do not provide the necessary configuration relationship information regarding how an IT service supports effective change impact analysis. IT SDM tools provide this unique capability. They are often leveraged for projects like service view CMDBs, disaster recovery and data center consolidations. However, to meet the changing requirements of virtual, mobile and cloud platforms, SDM tools will require expanded functionality for breadth and depth of discovery, such as storage devices, mainframes, hybrid cloud resources, and transient mobile/virtual cloud resources such as containers. SDM for enterprise-defined data center (EDDC) and hybrid cloud resources will likely take two to three years to mature, because most activity currently focuses on production applications.

SDM tools continue to fall short in the discovery of homegrown or custom applications. Although SDM tools provide functionality to create the application or IT service blueprints, the task of validating the relationships remains labor-intensive, which will slow enterprisewide adoption of the tools beyond their primary use of discovery.

Time to Next Market Phase: Two to five years

Business Impact: SDM tools will have an effect on high-profile initiatives, such as IT service view CMDBs, and data center transformation projects. These tools will also have a less glamorous, but

significant, effect on the day-to-day requirements to improve configuration change control by enabling change impact analysis, and by providing missing relationship data critical to disaster recovery initiatives.

This level of proactive change impact analysis can create a more stable IT environment, thereby reducing unplanned downtime for critical IT services, which will save money and ensure that support staff are allocated efficiently. The end result is improved application availability and reduced service disruption, which have significant impact on the business' view of IT and on overall service delivery.

User Advice: With modest innovation during the past several years, companies considering SDM should evaluate the vendor's roadmap to ensure there is a focus on emerging technology requirements. The tools should be considered precursors to IT service view CMDB initiatives because a CMDB by definition provides contextual awareness. Those considering projects such as disaster recovery and data center consolidations, and other tasks that benefit from a near-real-time view of the relationships across data center infrastructure, should consider SDM tools. Although most of these tools aren't capable of action-oriented configuration functions (for example, patch management), the discovery of the relationships (especially for virtual machines, which are often obscured) can be used for a variety of high-profile projects that require comprehensive IT service views. IT SDM tools can document what is installed and where, and can provide an audit trail of configuration changes. Network port level and storage device discovery are differentiators among the various SDM vendors. If this is a priority in your service model, then ensure the tool is tested for this capability in a proof of concept.

If the use case for these tools is to gain visibility in your virtual or cloud infrastructure, ensure that the tool can discover and map virtual-to-virtual relationships (where IT services are within a single host, or across hosts and data centers), as well as virtual-to-physical relationships (for example, where the application might be virtualized, but the database might still be physical). If the virtual infrastructure includes public cloud resources, ensure that the IT SDM tool supports cloud service provider APIs (for example, Amazon).

Sample Vendors: BMC; HPE; IBM; ServiceNow

IT Service Support Management Tools

Definition: IT service support management tools help I&O organizations manage the consumption of IT services, the infrastructure that supports the IT services and the IT organization's responsibility in supporting these services. They are a core component of the ITSM 2.0 minisuite of ITOM tools.

Trend Analysis: ITSSM tools are classified based on IT service management capabilities and integration with ITOM solutions. Basic ITSSM tools have some ITSM capabilities and limited integration with ITOM solutions. Intermediate ITSSM tools have good ITSM capabilities, and provide some basic ITOM functions or integrate with intermediate third-party ITOM solutions. Advanced ITSSM tools have a full range of ITSM capabilities, and provide broad ITOM functionality natively or integrate with advanced third-party ITOM solutions. There are over 450 ITSSM products, but the majority are basic or intermediate tools that focus on IT service desk and ticketing functions



targeted at lower maturity I&O organizations. Some innovation occurs in advanced ITSSM tools, but these are aimed and priced to suit few organizations. Vendors are increasingly concentrating product development on non-ITSM 2.0 use cases as market saturation of basic and intermediate ITSSM tools continues. If this trend continues, this market will stagnate.

Time to Next Market Phase: Two to five years

Business Impact: ITSSM tools help I&O organizations manage the consumption of IT services, the infrastructure that supports the IT services and the IT organization's responsibility in supporting these services. These are most heavily used by IT service desks and IT service delivery functions. Some non-I&O departments (such as HR or facilities) adapt generic ticket handling and workflow capabilities for their own use.

User Advice: I&O organizations that plan on achieving or retaining Level 1 or Level 2 I&O maturity should consider basic or intermediate tools to avoid overspending on tools that provide value by integrating with broader ITOM solutions, specifically in the area of IT asset management, discovery and IT process automation. I&O organizations assured of reaching Level 3 I&O maturity within the next 18 months should consider advanced ITSSM tools to gain value from solutions focused on broader, end-to-end IT service support and delivery. Once I&O organizations shortlist vendors that meet their requirements, further differentiation of ITSSM tools are TCO (specifically in perpetual versus software-as-a-service licensing models), ease of use, ease of implementation, ease of ongoing maintenance and advanced features. Non-I&O functionality may be attractive, but this is overhyped by vendors, and proven cases rarely extend beyond ticket handling.

Sample Vendors: Axios Systems; BMC; CA Technologies; Cherwell Software; EasyVista; Heat Software; HPE; Landesk; ServiceNow

Enterprise Mobility Management Suites

Definition: Enterprise mobility management suites help organizations securely integrate mobile devices into their enterprises' systems. EMM suites configure devices to comply with organizations' policies, secure and deploy applications, protect enterprise data, and optionally provide contextual trust. There are five core EMM technical categories that help IT organizations perform these services: mobile device management, mobile application management (MAM), mobile content management (MCM), mobile identity and containment.

Trend Analysis: The foundational technologies (such as MDM and MAM) underpinning EMM suites vary by platform. EMM suites struggle to provide consistency in managing and securing mobility in a diverse mobile landscape. While MDM is becoming standardized, customers still experience challenges in the implementation of the broader EMM suites. This is largely due to the immaturity of the tools in respect to providing a good balance between security and usability, and the lack of policy parity across all mobile platforms. Organizations are also wrestling with end-user resistance to enrolling devices into EMM due to perceived loss of privacy. EMM solutions vary in their capabilities to manage mobile devices versus PCs as well as mobile apps versus SaaS apps, leading to different workflows and different consoles.

The products will continue to broaden and leverage synergistic capabilities between EMM and identity and access management (IAM) to provide a unified workspace. Mac OS X, and more recently Windows 10, introduces new management APIs that will allow organizations to use EMM suites to manage PCs. EMM suites will standardize functionality based on mobile-platform-specific technologies, such as Apple MDM, Android for Work and Windows 10 Enterprise Data Protection.

Time to Next Market Phase: Two to five years

Business Impact: EMM suites help enable mobility in the enterprise, so the business impact of EMM is tied to the business impact of mobility itself. CIOs and business leaders realized the growing importance of enterprise mobility as a means to gain competitive advantage. In that sense, EMM is used as a business enablement tool to fulfill two basic requirements: enable general productivity (email, calendar, access to documents) and improve business processes (for example, customer interactions, real-time data entry, sales automation, field service applications). In addition, the integration between EMM and IAM functionality enables organizations to manage both mobile and SaaS apps through a single workspace, thus enabling a wide range of use cases that complement an organization's move to the cloud.

The biggest risk introduced by mobility is the increased likelihood of data leakage. EMM suites help organizations make mobility secure by implementing various measures to protect enterprise data. EMM suites also improve IT operational efficiency by automating provisioning and configuration management at large scale, and helping IT departments troubleshoot end-user devices.

User Advice: Identify critical policy controls and the mobile use cases in your organization, and evaluate the EMM functions that are most critical in addressing those requirements. No EMM vendor excels in all functions because of the breadth of the products.

Use mobile apps as a catalyst to drive business mobility initiatives and increase adoption of EMM among your user base. EMM solutions have evolved to manage apps and deliver content without device enrollment.

Train your users at the time of deployment to increase overall user satisfaction and reduce support overhead.

Use the integration with IAM tools to provide features like conditional or adaptive access to incorporate resources that take into account the security posture of the managed device. Identify the right use cases for managing PCs using EMM, such as BYOPC, third-party workers and environments with few Win32 application needs. Adopt a platform-centric approach to containerization, and avoid lockdown to EMM-specific SDKs.

Sample Vendors: BlackBerry; Citrix; IBM; Matrix42; Microsoft; MobileIron; Sophos; Soti; VMware (AirWatch)



Cost

User Personalization Management

Definition: User personalization management tools manage user-specific configurations (profiles, settings, policies and, in some cases, applications) separately from the OS. This enables a personalized workspace, regardless of platform (PC, server-based computing [SBC] or virtual desktop). These tools help maintain consistency and compliance across multiple computing platforms.

Trend Analysis: User personalization management is niche technology used primarily to maintain user profiles in SBC environments. During the past three years, user personalization management adoption has grown, driven by the growth of SBC, HVDs and mobile computing. Organizations typically need user personalization management when they expand SBC and HVD environments, and encounter performance and scalability issues with roaming user profiles. The profile management aspect of user personalization management is maturing. Although some personalization management is included as standard in OSs and applications, large organizations and those with a high complexity may still require best-of-breed products in this space.

As HVD environments have grown, user personalization management vendors added capabilities to address personalization challenges beyond those associated with user profiles, such as application delivery (including user-installed applications), application privilege elevation and license management.

User personalization management technology is infiltrating the client OS and even applications. Microsoft has embedded roaming of user preferences into Windows 8 and Office 365 ProPlus. Short term, this may spur interest in more complete user personalization management offerings from other vendors. Although some vendors have developed products for MDM, MAM and file synchronization, user personalization management products are specific to Windows environments, and are not applicable to non-Windows platforms.

Time to Next Market Phase: Two to five years

Business Impact: User personalization management tools improve user experience by making the desktop more personalized and by enhancing performance. They can also reduce I&O costs by reducing the number of servers, amount of storage and number of images that organizations must use to provide users with a personalized desktop. Workspace virtualization tools are critical to making user-centric computing work.

User Advice: Organizations should develop their requirements first, and then look to the market for tools. The most significant factors that affect product choices include:

- Platform support: Physical, HVDs and SBC, as well as back versions of Windows (such as Windows XP and Windows Server 2003).
- Complexity: User personalization management tools vary in terms of complexity. In general, the most comprehensive products require substantial IT staffing to administer. Include staffing and administrative expertise in the evaluation.

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Profile management: Various events can trigger a profile capture (for example, logoff and application close). More comprehensive coverage of profile triggers can reduce the instances of profile corruptions and last-write-win scenarios.

Sample Vendors: AppSense; Citrix; Liquidware Labs; Microsoft; RES Software; AppiXoft (Scense); VMware

IT Service Catalog Tools

Definition: IT service catalogs support request fulfillment by simplifying the documentation of orderable IT service offerings, and the creation of a portal that enables business users to easily submit IT service requests. This portal should provide clear information on service pricing, service-level commitments, escalation-/exception-handling procedures and how to request IT services. IT service catalog tools also provide a process workflow engine to automate, manage and track service request fulfillment.

Trend Analysis: IT service catalogs gained impetus with the ITIL V3 update in 2007; but analysis of ITScore results reveals that just 11% of I&O organizations have matured their IT service management processes to the point where they could successfully define their portfolio of IT services and decompose them into a catalog of standard, repeatable services that can be ordered by business customers. Consolidation in the market, including acquisitions, has resulted in fewer vendors selling IT service catalog tools as stand-alone products, and the core functions are usually found in ITSSM tool implementations. As demand for stand-alone tools has decreased, some of the leading vendors in this market have adjusted their focus from service catalog to business process management workflow solutions. Many IT service catalog tools are marketed as service request catalog tools that lack mature service portfolio capabilities, but recent developments from several vendors look to repurpose the tools as service broker catalog tools for other services and suppliers, such as cloud service brokerages and those outside of I&O (with digital marketplaces offering ready-to-use catalogs including services such as procurement and travel booking).

Time to Next Market Phase: Zero to two years

Business Impact: Service catalogs simplify the service request process for customers and link to automated service delivery processes for improved IT efficiency. Presenting a single "face" of IT to the customer for all kinds of IT interactions (incident logging, change requests, service requests, project requests and new portfolio requests) simplifies the customer experience and improves satisfaction. Understanding the costs and communicating the price for standard services on supported architectures help develop a shared understanding of the increased costs of ordering custom services that are not in the catalog, and reduce the volume of exception or ad hoc service requests.

User Advice: Before developing an IT service catalog, I&O organizations should develop an IT service portfolio, and should internalize the distinctions among services, processes, products and platforms. For each service catalog entry, define the service delivery process workflow steps and milestones for tracking success. This connection to the back-office service fulfillment processes supports automation and improves IT efficiency. I&O organizations with a lower I&O maturity (an

ITScore for I&O [ITSIO] of 2 or lower) should focus on service request fulfillment for now, and be prepared to revisit the service catalog at a later stage. Otherwise, they are likely to produce an asset database that is focused on technical components and IT capabilities that aren't really IT services. Invest in service broker catalog tools only after their digital marketplaces are populated with services you want to use. At this time, no vendor has delivered on this potential, so purchasing these tools will require a longer-term speculative investment that may never pay off. I&O organizations using these tools will have to build their own interfaces and connectors, and work with suppliers directly. Through 2018, no service broker catalog tool vendor will offer a comprehensive digital marketplace.

Sample Vendors: Biomni; BMC; Cisco; HPE; Kinetic Data; PMG; RES Software; ServiceNow

Replacement

Knowledge Management Tools

Definition: I&O organizations use knowledge management (KM) tools to create IT knowledge bases and ensure that their content is updated, relevant, and useful for IT and business users. KM tools are often linked to portals that support self-service, so that end users can resolve simple incidents themselves. The products are defined by their ability to collect, store and access data about IT services. KM tools are available as stand-alone options or modular components of broader ITSSM tools.

Trend Analysis: KM provides significant untapped potential for many IT organizations to optimize, drive efficiencies and realize economies of scale in ITSSM. The current customer buying trend is toward platforms that can be integrated with ITSSM tools and can leverage the capabilities of existing tools. The primary functionalities of these products are searching, using, contributing, editing, promoting and reporting on knowledge analytics.

KM tools are becoming more commonplace in IT organizations. Gartner estimates that the market penetration is between 5% and 20%. Many organizations struggle to realize the ROI and true value due to cultural issues, behavioral challenges and a lack of understanding on the successful implementation of these tools.

Time to Next Market Phase: Zero to two years

Business Impact: Used optimally, a good knowledge base can create significant efficiencies in incident handling, request fulfillment, impact assessments and self-service implementation. Knowledge tools can drive down TCO and free up IT service desks and other capabilities to be deployed elsewhere. The effective use of KM can also pay off in terms of the qualitative perspective, with a positive impact on customer satisfaction and overall customer perception.

User Advice: KM tools should be an integral part of an I&O strategy, whether through stand-alone options or as part of an ITSSM suite. Integration is necessary to reap the benefits of a knowledge base, and buyers should assess which platform best suits their needs. However, don't overemphasize the tools' potential for success. Tools enable processes, but are only as good as the processes, procedures and policies you have in place.



Sample Vendors: Knowesia; RightAnswers

Client Management Tools

Definition: Client management tools manage the configurations of client systems. Specific functionality includes OS deployment, hardware and software inventory, software distribution and patch management, software usage monitoring and remote control. End-user computing and support organizations use CMTs to automate system administration and support functions that would otherwise be handled manually.

Trend Analysis: Client management tools are a mature technology and are widely used in both midsize and large enterprises, although there is variability in the extent to which their range of capabilities are utilized. For many organizations, CMTs remain the primary means to reduce cost of ownership, improve user productivity, increase IT efficiency and help enable a secure client computing environment. Despite being a highly mature technology market, changes in the mobile and endpoint computing landscape are forcing CMT vendors to evolve products to address new requirements. Client management tool core management tasks of inventory, software distribution, patch management and operating system deployment are constant across products, while new capabilities are added to extend usefulness for a more diverse set of management requirements. Areas of enhancement include self-service, enterprise mobility management integration, endpoint security and compliance, and cross-platform support.

Time to Next Market Phase: Two to five years

Business Impact: Among ITOM tools, client management tools have one of the most obvious ROIs – managing the client environment in an automated, one-to-many fashion, rather than on a manual, one-to-one basis. They are usually easy to justify based on a combination of cost savings, reductions in end-user downtime and improved security. Client management tools provide their greatest business value when used in conjunction with other operations tools, such as service desk, and where end-to-end management processes are established.

User Advice: IT organizations will benefit most from client management tools when standardization and policies are in place before automation is introduced. Although these tools can significantly offset staffing resource costs, they often require dedicated resources to maintain the product.

The right tool for any organization depends on a large number of factors, including, but not limited to:

- Skill level and number of IT staff
- Scalability and architecture
- Ease of use
- Cost to purchase and operate
- Support for non-Windows PCs (for example, Mac, virtual desktops, servers)

- Integration with EMM products
- Integration and inclusion with other IT management tools (for example, service desk)
- Remote-office or home-user management requirements
- Endpoint security requirements
- SaaS delivery options

Organizations should not merely choose from the biggest and most well-established vendors; they should create a list of criteria that describes their needs, and select from vendors that best meet those requirements. Organizations should use a vendor that can meet their specific needs for at least the next three years. Strong focus should be placed on skills, training, process and proper product implementation, because these factors will strongly influence an organization's product experience.

Client management tools geared for large enterprises are often complex and expensive, and require too much administration for many smaller organizations to manage. Tools geared toward midmarket are often unable to scale or do not provide the advanced management functionality required by large enterprises.

Sample Vendors: BMC; CA Technologies; Dell KACE; Heat Software; IBM; Landesk; Matrix42; Microsoft; Novell; Symantec

Business Service Management Tools

Definition: Business service management (BSM) tools enable business-oriented prioritization of IT operations by supporting construction of logical relationships between business priorities and the IT infrastructure and applications that support them. These constructs help define a real-time, end-toend IT service model, against which associated availability and performance event data is gathered, processed and provided via business-oriented dashboards used to support change impact planning, root cause analysis and other operational processes. At its core, BSM is about providing a capability to manage technology as a business service, rather than as individual IT infrastructure components.

Trend Analysis: Most organizations dynamically focus IT operational resources on issues impacting the most important business functions. BSM is the technology initiative of this effort. A majority of IT organizations lack organizational and process maturity (Level 2.33 based on Gartner's ITScore for I&O data), which is the most significant barrier preventing widespread BSM adoption. In addition, the upstream, cross-functional nature of BSM often results in the uncovering of deficits in subordinate monitoring and operational capabilities requiring multiple remedial efforts. These challenges force many organizations to slow and in some cases stall BSM initiatives.

Mature BSM-enabling technologies continue to evolve and improve and are increasingly appearing as capabilities in other toolsets (such as event correlation and analysis [ECA], application performance management [APM], IT operations analytics [ITOA] and BVD). However, the journey toward wider BSM adoption continues to be a very lengthy one. Gartner envisions BSM will either merge into one of these existing technologies or fall into complete obsolescence over the next 18 to

24 months. This is principally due to the inflated expectations, stagnant technology progression, alongside the manual effort required for implementations.

Time to Next Market Phase: Zero to two years

Business Impact: By enabling the business-aligned prioritization of IT operational efforts, all business services and processes across all verticals stand to realize:

- Improved efficiency (via higher-quality service delivery and shorter mean time to repair)
- Cost optimization (via a clearer understanding of resources required to support a given service)
- Risk mitigation (via a clear definition of systems that require specific controls and ownership)

BSM initiatives also provide a level of transparency and business context to the mechanics of IT operations through dashboards and reports. This fosters the much-needed level of collaboration between business and IT leaders to discover new business and IT support opportunities.

User Advice: IT organizations should initially focus on developing significant operational maturity across all dimensions — people, process and technology — so that IT operates in a service-aligned manner.

It is worthwhile to explore ITOA tools, and specifically the capability to provide service-dependency maps in conjunction with other discovery-oriented tools. With the trend toward digitized business, data generated by these business processes can be directly captured, aggregated and analyzed by ITOA platforms, providing operational and business data to relevant constituencies.

In case IT organizations continue pursuing BSM initiatives, care should be taken to ensure a tightly focused, stepwise implementation, which includes appropriate investments in organizational change and skill development, in addition to technology selection.

Sample Vendors: BMC; CA Technologies; Centerity; HPE; IBM; Kaseya; Micro Focus; ServiceNow; Tango/04 Computing Group; Zenoss

Gartner Recommended Reading

Some documents may not be available as part of your current Gartner subscription.

- "Gartner's IT Market Clock: Methodology Definition"
- "Choose IT Operations Management Tools Based on Your Requirements"
- "IT Market Clock for I&O Automation, 2016"
- "IT Market Clock for IT Infrastructure Availability and Performance Management, 2016"

"Hype Cycle for IT Availability and Performance Management, 2016"



"Hype Cycle for ITSM 2.0, 2016" "Hype Cycle for I&O Automation, 2016" "How to Use Gartner's IT Market Clocks"

More on This Topic

This is part of an in-depth collection of research. See the collection:

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