

# Enterprise Service Management – Software

A research report comparing provider strengths,  
challenges and competitive differentiators

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Report Author: Ashwin Gaidhani

### **ESM platforms are transitioning from technology-dependent to technology-agnostic systems**

Digital transformation has propelled swift change in enterprise service management (ESM) platforms, leading workflows and processes to be improvised and modernized. Technology barriers are continuously being pushed to meet today's expectations of digitalization and enable software platforms to be developed using low-code/no-code features and intelligent automation. The platforms' focus is directed toward delivering digital capabilities and solutions across enterprises. The main objective of ESM platforms is to provide an effective service that meets the demands of enterprises and their clients alike. This includes communication in every domain while establishing uniformity in capturing information.

We have seen a rise in ESM platform adoption across global enterprises with the ambition to accelerate digital transformation. We have also seen significant growth in collaboration between software vendors and service providers to build industry-specific solutions. This resolves the business challenge of data inconsistency and integration with enterprise data, eventually transforming the industry and its workflows.

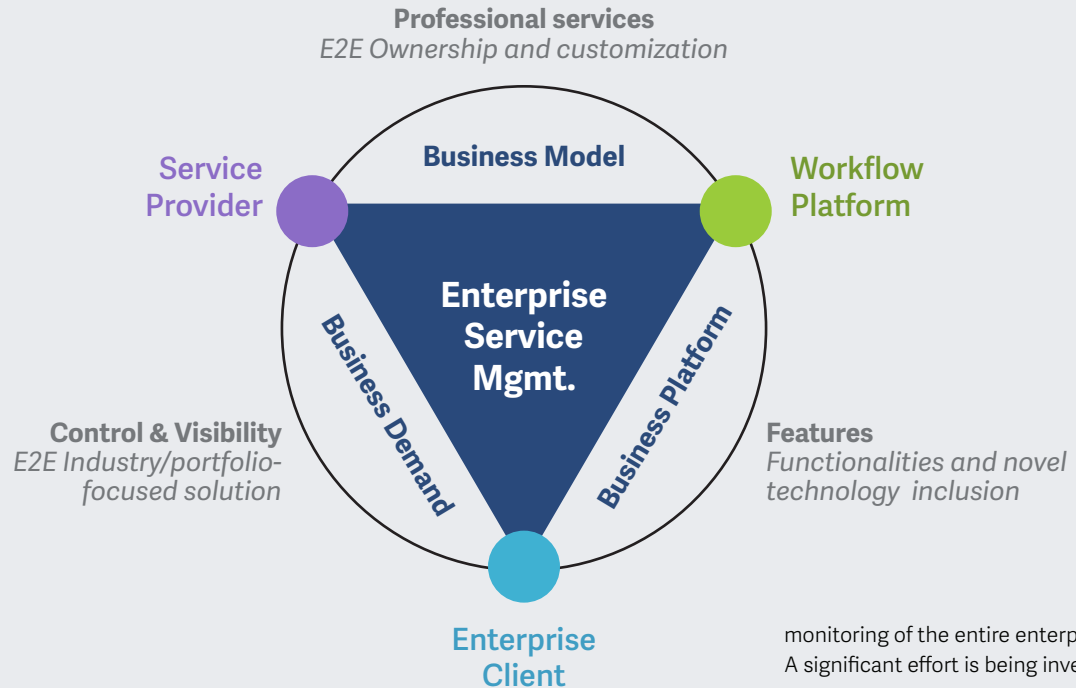
Organizational departments such as legal, HR, finance, marketing and sales have seen transformation and upscale in using and developing various tools designed for core business functions of every organization. These tools combine functionality into one platform to allow all target stakeholders, including employees, customers and users, to manage requests across teams. These service management tools are equipped with a self-service portal that enables employees and customers to acquire help when required. The tools offer integrated service management functionalities to track, operate and respond to specific organizational changes.

There is an  
increasing focus  
on **incorporating  
business rules**  
into **ESM platforms.**



The user experience quotient (UXQ) is the new business metric that emphasizes capturing the user experience at every interaction point. This has become one of the most popular performance indicators to ensure endpoint experience, which is critical to drive and deliver consistent engagement and value for every platform. XLA (experience level agreements) also complement the overall interaction experience for platform users. In addition, software vendors design platforms that enable users with little technical know-how to design processes. This will drive the platforms' adoption at every organizational level. Customization has become easier with the modernization of the design canvas for process flows, automation and orchestration. This also opens the possibility of adding independent capabilities such as intelligent document processing, conversational AI and process discovery and mining, helping businesses identify deviations and reconfigure their processes.

## ESM - Software



monitoring of the entire enterprise landscape. A significant effort is being invested in software



Infrastructure technology systems, digital assets and cloud components are integrated at every organizational level to ensure seamless asset management and digital assets to meet the increasing digitalization volume. It is becoming complex to record, track and monitor various digital assets, which are part of the business backbone. AIOps, orchestration and visualization are continuously improvised using predictive intelligence and data analytics. This helps businesses minimize and avert service disruption by proactively building resilient service continuity.

Integrated ML, advanced analytics, intelligent self-learning platforms, AI-enhanced processes and predictive technologies are being added to the platform capabilities and features list. ESM platform buyers typically look for capabilities like smart analytics, cloud-based data, cybersecurity systems, intelligent automation and innovative search systems, among others.

Persona-driven dashboards, landing pages and features are growing popular, adding convenience by presenting user-specific features, relevant options and focused

information for a personalized experience. ESM platforms are also extending the features to design customized user journeys and experience points through XLAs, the new metrics for measuring customer satisfaction and fulfillment.

Service providers' focus is shifting toward using no-code flows to eliminate manual, repetitive and cumbersome tasks and streamlining processes across all lines of business within an organization. Service providers primarily focus on using automation to drive efficiency by displaying all the services through a digital catalog process. The IT teams can automate access to software systems while tracking and logging every activity to ensure access, integrity and security.

As most of the workflow platform vendors are now cloud-native, they have built robust architectures comprising various layers, from the data layer (system of records) to the interface layer (system of engagement). These are container-ready with fully automated deployment and enhanced security. A scalable architecture and agile design capability are also increasingly in demand to meet the changing

customer and business expectations. The advancements in AI/ML have led to service providers leveraging those technologies to enhance support and deliver improved employee experiences. Allowing issues to self-resolve before users report them offers a swift and timely resolution, resulting in more efficacy and reduced delays. This helps departments across enterprises operate more efficiently by streamlining and automating tasks. It is equally important to note that the fierce and stiff competition among workflow management solutions is reducing the distribution of enterprise processes among ERP, business process management (BPM), CRM and service management solutions. With the increasing features and complex capabilities in software, the licensing cost is also increasing, which is one of the critical concerns for enterprise clients. Service providers have started building novel and attractive licensing models. This continues to be a focus area for service providers to keep the cost down and scale ESM platform adoption by enterprises.

The growing focus on sustainable operations has encouraged most businesses to monitor

and track their carbon footprint as global warming has risen at an alarming rate. Enterprises are also continuously focusing on sustainability to innovate, develop and implement processes, software or tools that would benefit the environment and reduce their carbon footprint. It has become imperative to adopt systems and tools to help identify, track and report emissions. To address the carbon emission issue effectively, enterprise workflow management software vendors have built environmental, social and governance (ESG) modules and process flows. The significant challenges most industries face in this aspect are in acquiring, digitizing, validating, visualizing and reporting their existing emission data. The shift toward investing in sustainable solutions through workflow software helps capture all the related data, enabling enterprises to adopt greener solutions in the coming years.




## Executive Summary

Consolidating and integrating enterprise attributes such as risk, governance and portfolio management will build a comprehensive view of the enterprise. Enterprise product management will be a parallel discipline to ESM. The enterprise product management capability will encompass a technical architecture and toolset. An effective enterprise software suite can manage, administer and record the service activities across all enterprise portfolios.

Machine learning, data analytics and intelligent automation continue to play a leading role in modernizing workflows and engagement experiences.



 Provider Positioning

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**ESM Platform Vendors – Global**

4me	Product Challenger
Alemba	Contender
Atlassian	Leader
BMC	Leader
Broadcom	Market Challenger
EasyVista	Product Challenger
Freshworks	Leader
HaloiTSM	Product Challenger
IFS assyst	Product Challenger
InvGate	Product Challenger

**ESM Platform Vendors – Global**

Ivanti	Leader
ManageEngine	Rising Star ★
Matrix42	Product Challenger
Micro Focus	Product Challenger
Serviceaide	Contender
ServiceNow	Leader
SolarWinds	Market Challenger
SymphonyAI Summit	Leader
SysAid	Product Challenger
TOPdesk	Contender



This study focuses on the evaluation of **ESM platform vendors** for enterprise-wide portfolios.

Simplified Illustration Source: ISG 2023

**ESM Platform Vendors – Global**

**Definition**

This study covers comprehensive business and IT SaaS solutions that enhance customer information management, enable connected workflows and offer intelligent task-processing capabilities. Enterprise workflow platform providers are building portfolio-aligned modules and packages to reduce complexity, simplify information exchange, deliver convenience and present a single view of work across records and data. Increasing the platform breadth to offer integrated service management allows operations, development and business teams to improve collaboration, track work across enterprises and quickly respond to business changes.

Enterprise service management platform vendors are continuously expanding their capabilities in every dimension of the enterprise portfolio. Driving the business impact are program management, product lifecycle management, software development lifecycle (SDLC) processes, customer experience, performance measurement indicators, and environmental, social and governance (ESG) influences.

Most ESM platforms are modular and flexible, with the ability to transform into cloud-native architectures supported by numerous emerging and evolving technologies. API integrations, predictive-prescriptive analytics, intelligent automation and machine learning components are inherent in these platforms. The current trend is for lightweight, agile, customizable products with reengineered processes, new designs and scalable architecture. Consulting firms, service providers and integration partners thrive on this opportunity to help enterprises deliver service transformation, migration, integration and implementations.





### Scope of the Report

In this ISG Provider Lens™ quadrant report, ISG covers the following quadrant: ESM Platform Vendors – Global.

This ISG Provider Lens™ study offers IT decision-makers the following:

- Transparency on the strengths and weaknesses of relevant software vendors
- A differentiated positioning of providers by segments (quadrants)
- Focus on regional market

Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

### Provider Classifications

The provider position reflects the evaluation within defined market segments (quadrants) and always applies to all business sectors and company sizes. In case the service requirements are different and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation by performance is made according to the target group for products and services. ISG considers the requirements of the business sector or the number of employees, as well as the corporate structures of the customers, and positions the providers according to their area of interest. As a result, ISG differentiates them, if necessary, into two groups defined as follows:

**Midmarket:** Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million, headquartered in the respective country, usually privately owned.

**Large accounts:** Multinational companies with more than 5,000 employees or revenues above \$1 billion, with worldwide activities and globally distributed decisionmaking structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four groups (Leader, Product Challenger, Market Challenger, and Contender), and providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include one service provider (or more) that ISG believes has a strong potential to move into the Leader quadrant. This type of provider is classified as a Rising Star.





**Provider Classifications: Quadrant Key**

**Product Challengers** offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

**Leaders** have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

**Contenders** offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

**Market Challengers** have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

**Not in** means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.





# ESM Platform Vendors – Global

### Who Should Read This Section

In this report, ISG highlights the current market positioning of global enterprise service management (ESM) platform vendors and shows how each vendor addresses some key challenges.

Enterprises across the world are extending ITSM and adopting ESM for several other aspects of their business, including HR, finance, facilities management and customer service, to name a few. One of the key challenges they face during the adoption phase is the need for proper communication within the departments adopting ESM solutions. The ESM adoption rate among enterprises is also heavily dependent on implementation, continuous support and training services provided by platform vendors' experienced partners.

Enterprises also need to focus on understanding the right vendor for their requirements. While there are vendors providing comprehensive ESM solutions, it may not be feasible for budget-constrained companies to use these platforms in the long run due to the huge maintenance cost. Hence, enterprises need to clearly set their expectations and budget before adopting an ESM platform.



**Technology professionals** should read this report to understand how a robust and agile enterprise software solution is built and considered a success factor.



**Operations professionals** should read this report to understand each ESM platform's process flow compatibility and business alignment approach without compromising the compliance parameters.



**Customer experience professionals** should read this report to recognize how ESM software accommodates business and operational process requirements and provides user satisfaction while retaining UX and UI components.



**ISG** Provider Lens™  
 Enterprise Service Management – Software  
 ESM Platform Vendors – Global

Source: ISG RESEARCH  
 Global 2023



This quadrant analyzes **ESM software platform vendors' capability** to provide **workflow and process support across enterprise portfolios**. The ESM platforms are modernizing the operations for IT and non-IT functions like organizational and business workflows.

Ashwin Gaidhani



### Definition

An ESM platform encompasses the processes, workflows and information flow of all services in an enterprise ecosystem, including IT, organizational and business services. The platform provides process modules for various stakeholder segments to enable seamless integration with cloud-native characteristics across enterprise systems, including internal and external software. A platform's role, industry and function-agnostic attributes are essential parameters for evaluation.

This quadrant assesses ESM platform vendors on their capabilities to drive services across enterprise portfolios. Their software platforms drive workflows and work management activities across various functions such as HR, IT and procurement. The study covers the functionalities and customization abilities of a platform that offers solutions that are specific to customers, businesses and organizational areas. ESM platform vendors provide a collective set of IT service management software, business process management tools and organizational support components.

This quadrant covers work administration solutions that drive technical and functional processes and domain-specific tools for supplementing and complementing work management activities. This includes emerging technology components and digital elements to enhance effectiveness, efficiency and experience.

### Eligibility Criteria

1. ESM platform vendors that **offer process and workflow management modules** to support business, IT and organizational operations through an exclusive licensed model as a standalone offering
2. Provide **organizational support capabilities for key enterprise services** for IT (ITSM), organizational processes (e.g., HR, F&A), facilities management and business support services (knowledge management)
3. Leverage **features that support business and customer initiatives** such as sustainability, development, design capabilities and program management
4. Offer multi-tenancy, access control, user/role administration, security management, **regulatory compliance and governance functionalities**
5. Offer **process modules for enterprise-wide processes**, components and accelerators for IT, employee and customer workflows
6. Provide **integration capabilities with internal and external systems** for seamless knowledge flow and data capture
7. Demonstrate **capabilities in embedded digital technologies** such as automation, analytics and machine learning to deliver user experience, intelligent process flows and business information (dashboards, reports)
8. **Proven ability to design, manage and provide guidance** on regulatory, compliance and governance frameworks as structured processes



### Observations

The market continues to witness the transformation and improvement of ESM workflow management platforms. These workflow platforms leverage ML and AI to enhance delivery support and improve employee experiences while allowing issues to self-heal before users report them, leading to a quick resolution. Platform functionality also helps various departments across enterprises automate and streamline repetitive tasks. Integrating workflow platforms with AI and ML provides clarity to customers, enabling smooth management of service delivery and performance in all aspects. The integration offers core ESM capabilities with DevOps, which enables automation for service and operation teams and helps organizations focus on growing their businesses. Enterprises are widely adopting these workflow management platforms to automate their activities or processes.

- The use of no-code flows and automation adopted by service providers have eliminated manual and repetitive tasks that would

otherwise become cumbersome, enabling users to streamline processes across all lines of business within their organizations.

- Service providers can utilize each business function's full-stack service management framework to streamline service operations.
- Service providers can use management tools and software that are purpose-built for business teams in HR, legal and facilities management to easily manage tasks such as employee onboarding and field support management requests. Legal teams can shift from manually chasing down signatures to working collaboratively with an automated digital workflow.

Of the 40 providers assessed for this study, 20 have qualified for this quadrant, with six being Leaders and one a Rising Star

### Atlassian

**Atlassian's** Jira Service Management offers an intuitive, cost-effective solution that is scalable and easily maintained by non-technical teams. Jira Service Management provides customers with a single, adaptable solution for a wide variety of business problems.

### BMC

**BMC's** strengths rely on its functionality in IT and application support, in addition to management. BMC Helix is an industry-leading, powerful, customer-centric solution that exploits emerging technologies such as AI and ML.

### Freshworks

**Freshworks** simplifies ITSM by offering a plethora of services, including aligning IT infrastructure to ITIL processes, tracking and assessing agent performance and service metrics with analytics, and increasing agent efficiency through AI and ML.

### Ivanti

**Ivanti's** Neurons hyper-automation platform and Cherwell service platform help deliver strategic value and make businesses efficient, compliant and secure by automating workflows and eliminating costly manual processes. Their scalability is appealing to enterprises.

### servicenow.

**ServiceNow** continues to lead the ESM platform domain. Its ESM workflow solutions deliver streamlined offerings for enterprise services by extending capabilities beyond IT into business-centric service lines, transforming processes and empowering customers and employees.



## ESM Platform Vendors – Global



**SymphonyAI Summit** simplifies the ITSM environment through a multi-tenant architecture. It helps monitor one platform instead of different technology stacks for each user, empowering the provider to deliver effective service and support.

### ManageEngine (Rising Star)

**ManageEngine's** ESM solution comprises the management of enterprise and IT service, customer service and IT assets. It establishes and manages customer relationships, boosts employee productivity and standardizes service delivery.







“SymphonyAI Summit has a strong portfolio of ESM solutions focused on AI-based virtual assistants and out-of-the-box solutions.”

Ashwin Gaidhani

# SymphonyAI Summit

## Overview

SymphonyAI Summit is based in California, U.S., and has operations in the US, South East Asia, the Middle East and India. The company has a strong partner ecosystem that includes leading service integration and managed services players. SymphonyAI Summit provides AI-infused service management platform, service automation, conversational AI and an asset management module. The company has ESM coverage, including IT, HR, admin and facilities management. The company focuses on delightful customer experiences with cutting-edge technology at its core.

## Strengths

**Low-code/no-code experience:** SymphonyAI Summit provides low-code/no-code experience to enterprises through its components such as Form Builder, Workflow Engine and Business Rule Engines. Various departments, including IT in different enterprises, can configure and automate various business processes without much dependency on administrators and other related teams. This helps enterprises to improve productivity, increase operational efficiency and optimize operational costs.

**Comprehensive ESM suite:** The company offers an all-inclusive range of ESM solutions, encompassing service management, asset management, Digital Agent, and Service Automation. Its AI-powered virtual agent,

CINDE, provides faster resolution, multi-channel support, 24/7 operations and intelligent routing, resulting in the deflection of incidents and service requests.

**Reporting and Dashboard:** SymphonyAI Summit offers out-of-the-box reports plus reporting engines that can be used to build custom reports and dashboards. Enterprises can also use reporting engines to build metric-based and service-specific dashboards and visualizations. These solutions can be integrated with other tools available in the market. It also provides built-in connectors to PowerBI, Grafana and other popular reporting and dashboard platforms.

## Caution

The company has heavily revamped and developed its product portfolio over the past three years and gained more market presence. However, compared to some of the major vendors in the area, there is an opportunity for improvement in the offerings (ESG, GRC e.g) that enhance the enterprise-wide coverage.





# Appendix

The ISG Provider Lens™ 2023 – Enterprise Service Management - Software research study analyzes the relevant software vendors/service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

**Lead Author:**

Ashwin Gaidhani

**Editors:**

John Burnell, Radhika Venkatachalam

**Research Analyst:**

Arjun Das

**Data Analyst:**

Laxmi Sahebrao Kadve

**Consultant Advisor:**

Yadu Singh

**Project Manager:**

Swathi Amin

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of January 2023, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars (\$US) unless noted.

The study was divided into the following steps:

1. Definition of Enterprise Service Management Software market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
  - \* Strategy & vision
  - \* Tech Innovation
  - \* Brand awareness and presence in the market
  - \* Sales and partner landscape
  - \* Breadth and depth of portfolio of services offered
  - \* CX and Recommendation



## Author & Editor Biographies

Author



**Ashwin Gaidhani**  
**Research Partner**

Ashwin Gaidhani has a comprehensive understanding of enterprise services and digital business transformation initiatives with over two decades of experience in this field. A subject matter expert in enterprise services and workflow management, Ashwin is contributing to ISG Provider Lens™ studies as a Lead Analyst and Author, highlighting related services, platforms and digital technologies.

Ashwin brings to the table an extensive business and technology experience, revolving around service management, consulting, emerging capabilities (AI and intelligent automation), work design methodologies implementation frameworks.

Research Analyst



**Arjun Das**  
**Senior Research Analyst**

Arjun Das is a senior research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Enterprise Service Management, ServiceNow Ecosystem, Banking Platforms and Services and SAP HANA Ecosystem Services. He supports the lead analysts in the research process and authors the global summary report. Arjun also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments as well.

Arjun has helmed his current role since 2020. Prior to this role, he has worked across several syndicated market research firms and has more than eight years of experience across research and consulting, with major areas of focus in collecting, analysing and presenting quantitative and qualitative data. His area of expertise lies across various technologies like IoT, artificial intelligence, VR/AR and blockchain.





*IPL Product Owner*

**Jan Erik Aase**  
**Partner and Global Head – ISG Provider Lens™**

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a partner and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.



### iSG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens research, please visit this [webpage](#).

### iSG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research delivers guidance that helps businesses accelerate growth and create more value.

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit [isg-one.com](http://isg-one.com).





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