Vendor Landscape: Enterprise Service Desk Software

Move past tickets to proactive, integrated service.

INFO~TECH
RESEARCH GROUP

Introduction

Service desk tools have moved beyond simple help desk ticketing systems to solutions designed to provide service tools for the entire enterprise.

This Research Is Designed For:

✓ Organizations seeking to select a solution for enterprise service desk.

✓ Their service desk use case may include:

- Lean IT infrastructure circumstances.
- IT-as-a-Service.
- Holistic service provision across the enterprise.
- All-in-one solutions with integrated ITIL modules including asset, change, and configuration management.
- ITSM support for a range of maturity capabilities.
- Increasing business-IT engagement.
- Integration with third-party data sources and tools.

This Research Will Help You:

✓ Understand what's new in the service desk market.

✓ Evaluate service desk vendors and products for your enterprise needs.

✓ Determine which products are most appropriate for particular use cases and scenarios.

Executive summary

Info-Tech evaluated 12 competitors in the enterprise service desk market, including the following notable performers:

Champions:

- **ServiceNow** offers best-in-class integration for managing service desks with an extensible, customizable platform.

- **Axios** provides an innovative way to increase organizational knowledge with modern collaboration features and customizability to support enterprise service management.

- **Cherwell's** codeless design architecture makes their solution fully configurable with multiple integrations available.

- **OMNINET** has a strong workflow focus to enable efficiencies for support staff.

Value Award:

- **OMNINET's** OMNITRACKER enables a services team to manage workflows, enable efficiency of documentation, and manage risks, all at an attractive price.

Trend Setter Award:

- **Hornbill's** Service Manager integrates communication and collaboration features throughout the solution to enable teams in multiple locations to easily share knowledge and overcome language barriers, through a modern, consumerized interface.

Info-Tech Insight

1. **Each vendor offers similar functionality:**
   At a high level, the enterprise class service desk solutions offer the same functionality. Look more granularly to ensure best fit, focusing on your organization's specific needs.

2. **Don't be distracted by flashy features you won't use:**

   Enterprise vendors may focus on the modern, consumerized features and new functionality that may appeal to many organizations, but don't be distracted by functions that are not suited for your organization. Before selecting a tool, ensure that business requirements are clearly defined and choose a tool that will support your unique user base and organization needs.

3. **Ensure your tool can grow with you:**

   Whether your organization plans on expanding its ITSM modules to include more advanced processes such as configuration or release management down the road, or extend the use of the ITSM tool to other business units, ensure the tool you select can support future needs before purchasing it.

Market overview

How it got here

- **Help desks evolved to service desks** that must deliver a comprehensive range of services and support complex applications. Focus shifted from basic ticket tracking to a formalized, proactive service management approach. Tools to support the service desk also grew in complexity to integrate with multiple systems.

- **End users grew more independent even as needs became more complicated.** The resulting challenge -- more incidents are being generated by a growing user base of individuals who do not want to contact IT to solve their problems.

- **Some organizations moved away from strict process defining frameworks** to simply informing processes using best practices from frameworks such as ITIL. Service desk software is following the same trend and expanding beyond the limits of restrictive frameworks.

Where it's going

- **More self-service portals with consumer service look and feel for the tech-savvy** who prefer to resolve their own issues, immediately, or request services without having to wait for IT. To meet expectations robust self-service portals will require a comprehensive knowledgebase, service catalog, instant chat support, and strong usability.

- **The service desk will extend across the enterprise.** Business units outside of IT will increasingly leverage service desk functions and tools. HR, Finance, and Sales are set to be the key benefactors. No matter organizational size, the value generated from efficient service management processes can be applied across the business to improve other core processes.

- **Bring Your Own Device (BYOD) and mobile usage will be a top priority for end users.** Service desk tools will need to be accessible from multiple devices. Access to email and other basic functions are low-hanging fruit; real innovators will provision end users with core enterprise applications and the ability to submit and track incidents from their mobile device.

Info-Tech Insight

More and more enterprise service desk vendors are moving toward modern, collaborative features with interfaces and functionality resembling social media and consumer sites. It is easy to be distracted by new and flashy features, but it's more important to stay focused on the core requirements your organization needs to improve service management, and the functionality that is best suited for your own users.

Service desk vendor selection / knock-out criteria: market share, mind share, and platform coverage

- End users are more interested and willing to engage in self-help prior to submitting a ticket, making knowledgebase and service catalog more important for service desk software. Additionally, features that will provide technician efficiencies and modules to enable more pro-active services such as change and problem management are increasingly important.

- For this Vendor Landscape, Info-Tech focused on those vendors that offer broad capabilities across multiple platforms and have a strong market presence and/or reputational presence among large-sized enterprises.
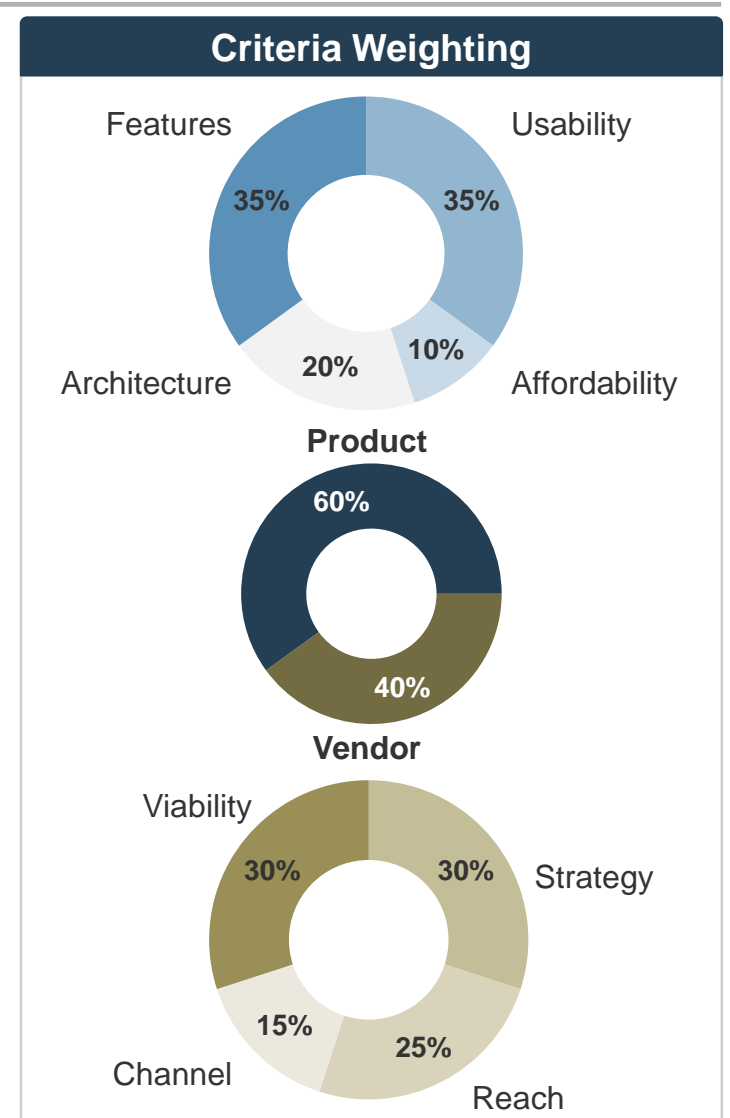
Included in this Vendor Landscape:

- **Axios.** Strong focus on process, innovation, support, and maturation of clients.

- **BMC.** A seasoned veteran with a mobile-first platform that's built for digital enterprise management.

- **Cherwell.** An emerging competitor in the space with innovative technology and a great deal of industry experience.

- **EasyVista.** A mobile-first product with a modern, consumerized look and feel.

- **HEAT Software.** HEAT'S Cloud Service Management product is their latest offering for enterprise users offering more functionality and greater ease of use.

- **Hornbill.** Offers a unique focus on usability with modern communication and collaboration features.

- **HPE.** A software market leader with longstanding vendor presence and global reach.

- **IBM.** A well-known vendor with a high-maturity solution on an integrated automation platform.

- **LANDESK.** A veteran vendor with a strong competitive service desk offering.

- **OMNINET.** A European contender with focus on out-of-the-box functionality as well as customizability.

- **ServiceNow.** The fastest-growing software company in North America, enhanced by a strong partner network.

- **SunView.** Started as a change management system for government organizations; has kept the compliance and audit control perspective as it expands its service desk offering.

Service desk criteria and weighting factors

Product Evaluation Criteria

Features	The solution provides basic and advanced feature/functionality.
Usability	The end-user and administrative interfaces are intuitive and offer streamlined workflow.
Affordability	Implementing and operating the solution is affordable given the technology.
Architecture	Multiple deployment options and extensive integration capabilities are available.

Vendor Evaluation Criteria

Viability	Vendor is profitable, knowledgeable, and will be around for the long term.
Strategy	Vendor is committed to the space and has a future product and portfolio roadmap.
Reach	Vendor offers global coverage and is able to sell and provide post-sales support.
Channel	Vendor channel strategy is appropriate and the channels themselves are strong.

Criteria Weighting

Features 35%
Usability 35%
Architecture 20%
Affordability 10%
Product

60%
40%
Vendor

Viability 30%
Strategy 30%
Channel 15%
Reach 25%

The Info-Tech Service Desk Vendor Landscape

## *The zones of the Landscape*

Champions receive high scores for most evaluation criteria and offer excellent value. They have a strong market presence and are usually the trend setters for the industry.

Market Pillars are established players with very strong vendor credentials, but with more average product scores.

Innovators have demonstrated innovative product strengths that act as their competitive advantage in appealing to niche segments of the market.

Emerging Players are comparatively newer vendors who are starting to gain a foothold in the marketplace. They balance product and vendor attributes, though score lower relative to market Champions.

The Info-Tech Enterprise Service Desk Vendor Landscape
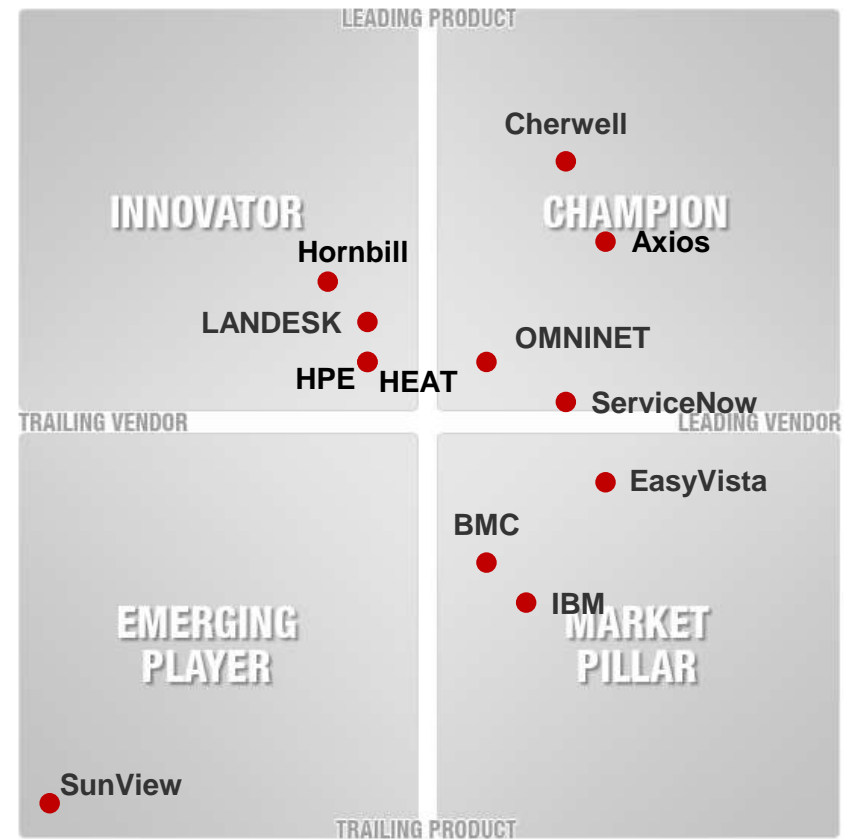
For an explanation of how the Info-Tech Vendor Landscape is created, see Information Presentation – Vendor Landscape in the Appendix.

Balance individual strengths to find the best fit for your enterprise

	Product					Vendor				
	Overall	Features	Usability	Afford.	Arch.	Overall	Viability	Strategy	Reach	Channel
Axios	Exemplary	Exemplary	Exemplary	Good	Exemplary	Good	Good	Exemplary	Exemplary	Exemplary
HEAT	Exemplary	Exemplary	Exemplary	Exemplary	Good	Good	Adequate	Adequate	Exemplary	Good
Hornbill	Exemplary	Good	Exemplary	Exemplary	Exemplary	Adequate	Good	Exemplary	Adequate	Poor
HPE	Exemplary	Good	Good	Good	Exemplary	Good	Good	Inadequate	Exemplary	Good
LANDESK	Exemplary	Exemplary	Good	Exemplary	Exemplary	Good	Good	Inadequate	Exemplary	Exemplary
OMNINET	Exemplary	Exemplary	Good	Exemplary	Exemplary	Good	Adequate	Exemplary	Good	Good
IBM	Good	Good	Exemplary	Inadequate	Exemplary	Good	Good	Good	Exemplary	Exemplary
ServiceNow*	Good	Exemplary	Exemplary	Poor	Exemplary	Good	Good	Good	Exemplary	Good

Legend	⬤ =Exemplary	◕ =Good	◑ =Adequate	◔ =Inadequate	◯ =Poor

*The vendor declined to provide pricing and publicly available pricing could not be found.

For an explanation of how the Info-Tech Harvey Balls are calculated, see Information Presentation – Criteria Scores (Harvey Balls) in the Appendix.

Balance individual strengths to find the best fit for your enterprise

	Product					Vendor				
	Overall	Features	Usability	Afford.	Arch.	Overall	Viability	Strategy	Reach	Channel
Cherwell	Exemplary	Exemplary	Exemplary	Adequate	Exemplary	Good	Exemplary	Exemplary	Adequate	Adequate
BMC*	Good	Good	Exemplary	Poor	Good	Good	Good	Adequate	Exemplary	Adequate
EasyVista	Good	Good	Good	Exemplary	Good	Good	Good	Exemplary	Exemplary	Exemplary
SunView*	Adequate	Good	Good	Poor	Good	Inadequate	Poor	Inadequate	Inadequate	Inadequate

Legend: ● =Exemplary ◕ =Good ◑ =Adequate ◔ =Inadequate ○ =Poor

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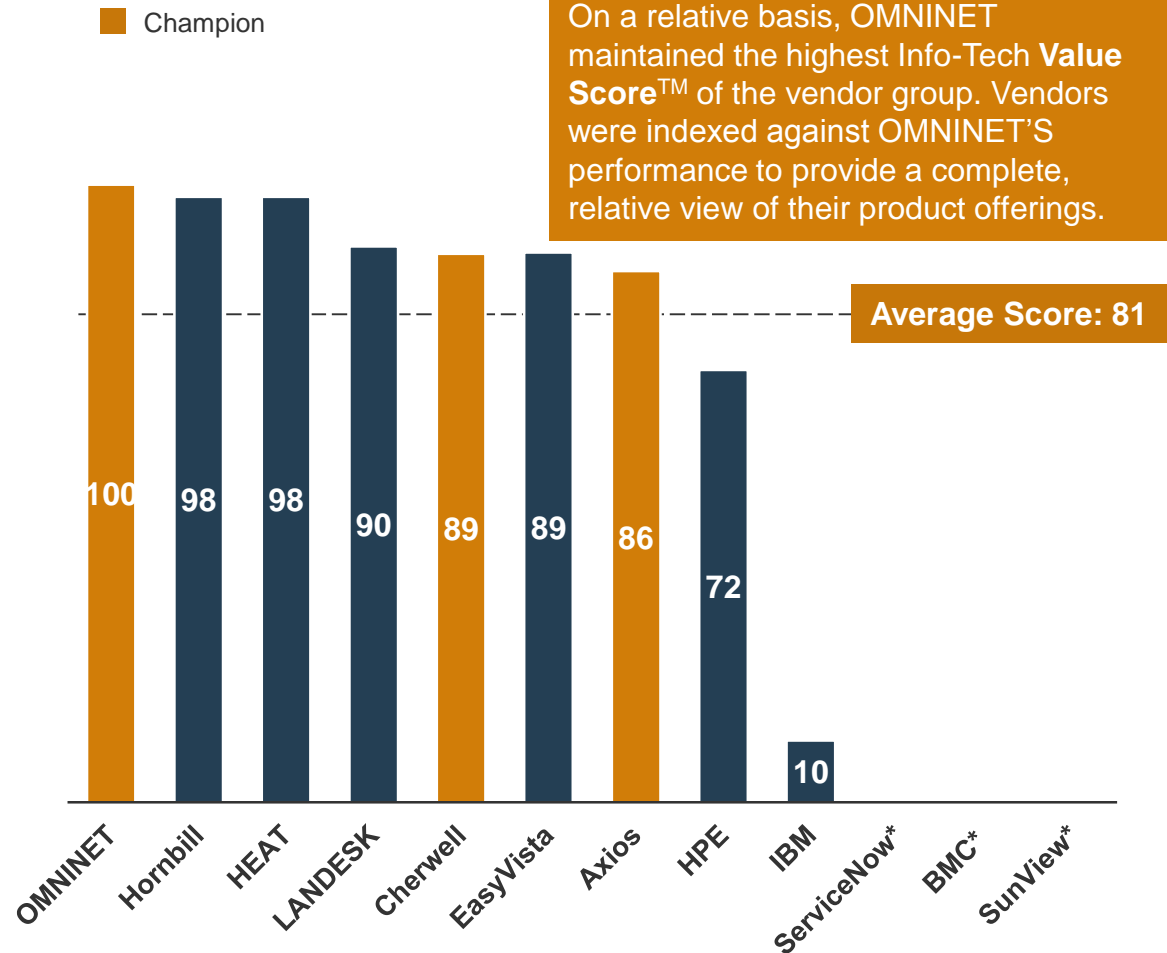# The Info-Tech Enterprise Service Desk Value Index

What is a Value Score?

The Value Score indexes each vendor's product offering and business strength **relative to its price point.** It **does not** indicate vendor ranking.

Vendors that score high offer more **bang-for-the-buck** (e.g. features, usability, stability, etc.) than the average vendor, while the inverse is true for those that score lower.

Price-conscious enterprises may wish to give the Value Score more consideration than those who are more focused on specific vendor/product attributes.

*The vendor declined to provide pricing and publicly available pricing could not be found.

On a relative basis, OMNINET maintained the highest Info-Tech **Value Score**TM of the vendor group. Vendors were indexed against OMNINET'S performance to provide a complete, relative view of their product offerings.

Average Score: 81

■ Champion

Vendor	Score
OMNINET	100
Hornbill	98
HEAT	98
LANDESK	90
Cherwell	89
EasyVista	89
Axios	86
HPE	72
IBM	10
ServiceNow*	
BMC*	
SunView*	

For an explanation of how Price is determined, see Information Presentation – Price Evaluation in the Appendix.

For an explanation of how the Info-Tech Value Index is calculated, see Information Presentation – Value Index in the Appendix.

Table Stakes represent the minimum standard; without these, a product doesn't even get reviewed

The Table Stakes

Feature	What we looked for:
Incident/Service Management	The process of handling requests from users for new services or equipment, or to resolve issues.
Problem Management	Proactive approach to reducing recurring incidents and increasing availability.
Change Management	Efficient and auditable process for managing requests for change to minimize downtime.
Configuration Management	Integrated CMDB to track and maintain configuration items and their dependencies.
Knowledge Management	Database integrated with ticketing system for sharing information between technicians.
Self-Serve	Ability to create incident tickets, request services, and access status and FAQ through a portal.
Application Integration	Ability to integrate with multiple systems management tools including Microsoft System Center, and with business systems such as ERP.

What does this mean?

The products assessed in this Vendor Landscape^{TM} meet, at the very least, the requirements outlined as Table Stakes.

Many of the vendors go above and beyond the outlined Table Stakes, some even do so in multiple categories. This section aims to highlight the products' capabilities **in excess** of the criteria listed here.

If Table Stakes are all you need from your service desk solution, the only true differentiator for the organization is price. Otherwise, dig deeper to find the best price to value for your needs.

Advanced Features are the capabilities that allow for granular market differentiation

Scoring Methodology

Info-Tech scored each vendor's features offering as a summation of its individual scores across the listed advanced features. Vendors were given one point for each feature the product inherently provided. Some categories were scored on a more granular scale with vendors receiving half points.

Pink Verify

The Pink Verify sign has been added to all vendors who have gone through the certification process with Pink Elephant, though this doesn't affect scoring.

Advanced Features

Feature	What we looked for:
End-User Self-Serve	Ability to create tickets and view status, FAQ, and service catalog with customizations.
End-User Interface	Tools to benefit end users such as single sign-on to self-serve, FAQ integration, and multi-language support.
Technician Administration	Easily designed dashboards, reports, forms, templates, and workflows, task management, and chat integration.
Technician Support	Integration with phone systems, remote control, software distribution and patch management, and print management.
Advanced Technician Support	Orchestration for task automation, alert aggregation, CMDB and dependency mapping, virtual war room.
Multi-Site Functionality	Central management of dispersed technicians, multiple time zones, operational hours, and automated shift reassignments.
Advanced Knowledgebase	Customizable templates, statistics, workflows for peer and editing reviews, and role-based database segregation.
Mobile	Access via web app, native mobile app for end users and technicians.
Project Management	Project management module, application lifecycle tools, and project portfolio management module.

For an explanation of how Advanced Features are determined, see Information Presentation – Feature Ranks (Stoplights) in the Appendix.

Each vendor offers a different feature set; concentrate on what your organization needs

	Evaluated Features								
	Self-service	Technician admin.	Technician support	End-user interface	Multi-site functionality	Knowledge-base	Mobile	Project management	Advanced technician support
Axios	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟡	🟢
HEAT	🟢	🟢	🟢	🟡	🟡	🟢	🟢	🟢	🟢
Hornbill	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🔴	🟢
HPE	🟢	🟢	🟡	🟢	🟢	🟢	🟢	🟡	🟢
LANDESK	🟢	🟢	🟢	🟡	🟢	🟢	🟢	🟡	🟢
OMNINET	🟢	🟢	🟢	🟢	🟢	🟢	🔴	🟢	🟢
IBM	🟢	🟢	🟢	🟢	🟢	🟢	🔴	🔴	🟡
ServiceNow	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
Cherwell	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
BMC	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🔴	🟢
EasyVista	🟢	🟢	🟡	🟢	🟢	🟢	🔴	🟡	🟢
SunView	🟢	🟢	🟡	🟢	🟢	🟢	🟡	🔴	🟡

Legend 🟢 =Feature fully present 🟡 =Feature partially present/pending 🔴 =Feature absent

For an explanation of how Advanced Features are determined, see Information Presentation – Feature Ranks (Stoplights) in the Appendix.

Infrastructure, regulatory requirements, and resources all contribute to the on-premises vs. cloud discussion

Products designed with both options in mind provide flexibility to move data without losing integrity should circumstances change.

1 **Deployment requirements**

2

3

4

Flexible provisioning of on-premises or cloud

Why Scenarios?

In reviewing the products included in each Vendor Landscape™, certain use cases come to the forefront. Whether those use cases are defined by applicability in certain locations, relevance for certain industries, or as strengths in delivering a specific capability, Info-Tech recognizes those use cases as Scenarios, and calls attention to them where they exist.

Provisioned only as on-premises or only cloud solution

While all vendors had both on-premises and cloud options, ServiceNow is only provided on-premises in exceptional circumstances, and with some vendors, the full array of features evaluated in this Vendor Landscape may not be identical in the on-premises version.

For an explanation of how Scenarios are determined, see Information Presentation – Scenarios in the Appendix.

Extending the capabilities of the service desk beyond IT will enable any department to build a services model

Extensibility of the software as a platform to support the productivity of non-IT units, especially modules and templates designed specifically for these units, can allow for future extension of the service desk across the enterprise.

1

2 **Enterprise services model**

3

4

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Tool can be extended to support non-IT units

For an explanation of how Scenarios are determined, see Information Presentation – Scenarios in the Appendix.

Consider these solutions for management of all of IT through a single vendor and integrated consoles

Integrate service management, asset management, and systems management, including consolidation of alerts to improve workflows and access to information.

1
2

3 **All-in-one solutions**

4

Where consolidation of complex information is critical

Axios SYSTEMS

bmc

Cherwell SOFTWARE

Hewlett Packard Enterprise

IBM

LANDESK

servicenow

Why Scenarios?

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For an explanation of how Scenarios are determined, see Information Presentation – Scenarios in the Appendix.

Many organizations would benefit from combining project management tools with service desk to manage tasks

Technicians who divide their time between project work and support can better manage tasks and time by using a common tool.

1
2
3

4 **Project management tools**

Why Scenarios?

In reviewing the products included in each Vendor Landscape™, certain use cases come to the forefront. Whether those use cases are defined by applicability in certain locations, relevance for certain industries, or as strengths in delivering a specific capability, Info-Tech recognizes those use cases as Scenarios, and calls attention to them where they exist.

Project management

Portfolio management

For an explanation of how Scenarios are determined, see Information Presentation – Scenarios in the Appendix.

OMNINET is focused on technician enablement through workflow and documentation efficiencies
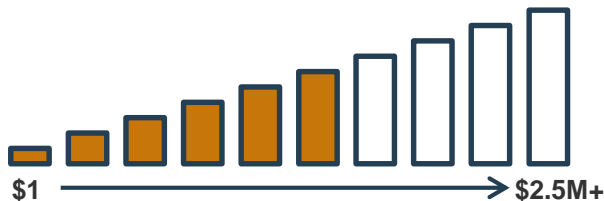
Champion

Product: OMNITRACKER ITSM Center
Employees: <200
Headquarters: Eckental, Germany
Website: omnitracker.com
Founded: 1995
Presence: Privately Held

3 year TCO for this solution falls into pricing tier 6, between $100,000 and $250,000.

$1 ——————————→ $2.5M+

Pricing provided by vendor

Overview

OMNINET's focus is on providing a single, fully configurable BPM platform that supports enterprise service management through a comprehensive set of applications on the same platform.

Strengths

- OMNINET'S flagship product is service management, but it is scalable to support any business process. The tool lends itself well to enterprise service management through multiple applications such as contract, facility, and project management.
- OMNITRACKER provides a platform upon which multiple applications exist, providing strong integrations between applications and allowing organizations to grow with the tool. Integrations also exist with system and asset management tools.
- Incident tickets link to the configuration item or asset causing the issue, which may reduce technician time to resolve incidents.
- The Risk Management application provides a unique function that allows organizations to track and assess potential business risks.

Challenges

- OMNINET has projects on its roadmap to improve the user interface in future releases.
- While OMNITRACKER has a mobile web gateway for technicians, it lacks a native mobile application, which may present a challenge to enterprises with many field technicians.
- While OMNINET has a strong market position in Europe, North America is a smaller install base for them.

OMNINET has a strong process focus with most advanced ITIL capabilities

Vendor Landscape

Value Index

100

1st out of 12

Product					Vendor				
Overall	Features	Usability	Afford.	Arch.	Overall	Viability	Strategy	Reach	Channel
◑	●	◗	●	●	◔	◑	●	◔	◔

ITIL Capabilities

Basic ITSM Modules

- ✓ Incident Management
- ✓ Request Fulfillment
- ✓ Change Management
- ✓ Problem Management

Intermediate ITSM Modules

- ✓ Asset Management
- ✓ Configuration Management
- ✓ Service Level Management
- ✓ Service Catalog Management

Optimized ITSM modules

- ✓ Event Management
- ✓ Capacity Management
- ✓ Availability Management
- ✓ Demand Management

Advanced ITSM modules

- ✓ Supplier Management
- ✓ Financial Management
- ✓ Knowledge Management
- x Service Portfolio Management
- ✓ Release & Deployment Management

Features

Self-service	Technician admin.	Technician support	End-user interface	Multi-site functionality	Knowledge-base	Mobile	Project management	Advanced technician support
🟢	🟢	🟢	🟢	🟢	🟢	🔴	🟢	🟢

Info-Tech Recommends:

Organizations looking for granular controls and automation of processes or looking to expand their ITIL processes or extend to other areas of the business should consider OMNITRACKER for their shortlist.