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WAVE REPORT

The Forrester Wave™: Enterprise Service Management, Q4 2023

The 12 Providers That Matter Most And How They Stack Up

November 5, 2023

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Summary

In our 24-criterion evaluation of enterprise service management (ESM) providers, we identified the most significant ones and researched, analyzed, and scored them. This report shows how each provider measures up and helps technology professionals select the right one for their needs.

Topics

| ESM Unifies The Flow Of W... | Evaluation Summary | Vendor Offerings | Vendor Profiles | ⋯ |

ESM Unifies The Flow Of Work Across The Enterprise

As vendors applied the rich practices within IT service management (ITSM) to the broader organization, enterprise service management became a platform differentiator. With increasing maturity in building business workflows across the vendor landscape, the vendors have turned to AI and ML — in particular, generative AI — to create distinction in the market. ESM platforms are feature rich with strong user and vendor communities, all contributing to the advancement and diversity of business-specific workflows. Connecting customers to support organizations and developers will drive substantial collaboration gains across the enterprise. But it leaves the market at a turning point. What do we call a platform that now serves the entire business, helping operations, product development, and customer service create connected workflows, data and information flow, and analytics capable of measuring business outcomes?

As a result of these trends, enterprise service management customers should look for providers that:

- **Support adoption of collaborative workflows across the enterprise and teams.** Collaboration across teams is a major advantage of an ESM platform. Organizations can utilize full-featured, complex workflows that assign work and tasks across the lines of business, IT, and developers; manage time frames with alerts and notifications; and manage service-level targets. Or citizen developers can quickly download a template from the community and develop and manage their own workflows to support the changing needs of the business.

agility. Organizations must balance the need for speed with full-featured capabilities to get the right balance to meet their requirements.

- **Integrate with other technologies for seamless collaboration and information flow.** Whether a company desires a single-platform approach or an integrated set of tools, enterprise service management platforms are now connecting the lines of business, IT teams, and developers and engineers. Integration with existing enterprise tools will provide visibility into how work gets done. The ability to measure the complete value stream from customers to developers is a reality, revealing bottlenecks, process inefficiencies, and opportunities for improvements across the enterprise. No longer are organizations struggling with understanding the end-to-end value stream; collaboration and information flow are now table stakes. For example, asset management is now tracking business digital assets as well as IT assets. Service portals include knowledge and requests for all departments, not just IT, HR, and facilities.

- **Use AI, ML, and generative AI to accelerate knowledge work.** Now is the time to accelerate how knowledge work gets done. The addition of artificial intelligence and machine learning allows organizations to learn how they manage work and automate critical tasks such as ticket routing, alert filtering, corrective actions, or risk assessment in change management. Generative AI is making a substantial impact on the knowledge worker experience, improving results in knowledge management, enabling chat in natural language with your data for easier reporting, simplifying workflow creation, and providing a much-improved chatbot experience. Organizations — emphasizing for the past decade that everything must be in a ticket — now have a rich repository of data to fine-tune large learning models. Combined with security controls already embedded in ESM, these platforms are an ideal use case for experimentation and early adoption of generative AI.

Evaluation Summary

The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market; it doesn't represent the entire vendor landscape. You'll find more information about this market in our report on The Enterprise Service Management Landscape, Q2 2023.

We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figures 1 and 2). Click the link at the beginning of this report on Forrester.com to download the tool.
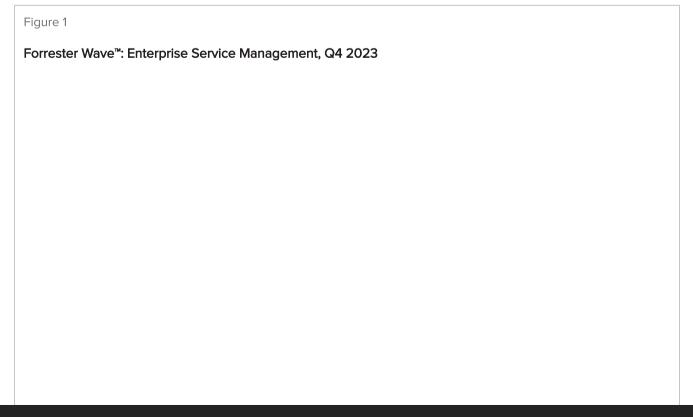
Figure 1

Forrester Wave™: Enterprise Service Management, Q4 2023

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| | Challengers | Contenders | Strong Performers | Leaders |

Stronger current offering

ServiceNow

BMC ●

Atlassian ●

Ivanti ●

IFS ●

USU ◉

OpenText ●

ManageEngine ●

Freshworks ●

Broadcom ◉

SolarWinds ●

Zendesk ●

Weaker current offering

Weaker strategy ──────────────▶ Stronger strategy

Market presence*

● ◉ ⊙ ⊙ ⊙

*A gray bubble or open dot indicates a nonparticipating vendor.

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Figure 2

Forrester Wave™: Enterprise Service Management Scorecard, Q4 2023

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	Forrester's weighting						
Current offering	50%	4.34	4.62	1.98	2.64	3.14	3.90
Functional modules	40%	3.80	4.80	1.80	2.40	3.20	4.20
Platform	30%	5.00	4.60	1.80	3.00	2.60	3.80
Technology management	30%	4.40	4.40	2.40	2.60	3.60	3.60
Strategy	50%	5.00	4.00	1.00	2.00	3.40	2.80
Vision	30%	5.00	5.00	1.00	3.00	5.00	3.00
Innovation	20%	5.00	3.00	1.00	1.00	3.00	3.00
Roadmap	10%	5.00	5.00	1.00	1.00	3.00	3.00
Partner ecosystem	10%	5.00	5.00	1.00	3.00	3.00	1.00
Adoption	10%	5.00	3.00	1.00	1.00	3.00	3.00
Pricing flexibility and transparency	10%	5.00	3.00	1.00	3.00	3.00	3.00
Community	10%	5.00	3.00	1.00	1.00	1.00	3.00
Market presence	0%	5.00	4.00	2.00	4.00	3.50	4.50
Revenue	50%	5.00	5.00	3.00	3.00	5.00	5.00
Number of customers	50%	5.00	3.00	1.00	5.00	2.00	4.00

	Forrester's weighting	ManageEngine	OpenText	ServiceNow	SolarWinds	USU	Zendesk*
Current offering	50%	2.58	2.76	4.64	1.98	2.96	1.72
Functional modules	40%	2.40	2.40	5.00	2.40	3.20	1.60
Platform	30%	3.00	3.00	5.00	1.80	2.60	2.60
Technology management	30%	2.40	3.00	3.80	1.60	3.00	1.00
Strategy	50%	3.00	2.60	4.60	2.20	3.00	1.80
Vision	30%	3.00	3.00	5.00	1.00	3.00	1.00
Innovation	20%	3.00	3.00	5.00	1.00	5.00	3.00
Roadmap	10%	3.00	3.00	5.00	3.00	3.00	1.00
Partner ecosystem	10%	3.00	1.00	5.00	1.00	1.00	3.00
Adoption	10%	3.00	1.00	5.00	3.00	3.00	1.00
Pricing flexibility and transparency	10%	5.00	3.00	1.00	5.00	1.00	3.00
Community	10%	1.00	3.00	5.00	5.00	3.00	1.00
Market presence	0%	2.50	3.50	5.00	4.00	2.00	5.00
Revenue	50%	3.00	4.00	5.00	5.00	3.00	5.00
Number of customers	50%	2.00	3.00	5.00	3.00	1.00	5.00

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

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Vendor Offerings

Forrester evaluated the offerings listed below (see Figure 3).

Figure 3

Evaluated Vendors And Product Information

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Atlassian	Jira Service Management	Version 5.9.x June 2023
BMC	BMC Helix Enterprise Service Management Advanced Suite	22.1.06
Broadcom	CA Service Management	N/A
Freshworks	Freshservice for Business Teams	Jul-23
IFS	IFS assyst	11.6
Ivanti	N/A	N/A
ManageEngine	ManageEngine ServiceDesk Plus	14304
OpenText	SMAX	2023.05
ServiceNow	ServiceNow	Vancouver Release
SolarWinds	N/A	N/A
USU	USU Enterprise Service Management	5.3
Zendesk	N/A	N/A

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Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

Leaders

- **Atlassian simplifies team collaboration across the enterprise.** As a newer ESM entrant, Atlassian's differentiated vision is to offer a comprehensive and integrated suite of tools that seamlessly connects development, IT, and business teams to foster enhanced collaboration and workflow efficiency across the entire service delivery lifecycle. With a focus on innovation, the product stands out in the market as the platform that unites knowledge workers across functional divides and provides comprehensive developer support. Formed with input from customers, advisory boards, and partner ecosystems, its roadmap includes diverse investments, such as advanced automation and orchestration, unified help, and product analytics that empower end-to-end visibility of the product lifecycle.

  With an extensive library of templates, the platform allows customers to quickly build lightweight, tailor-made workflows to meet their specific business needs without the bloat or cost of unnecessary features. Its unique, open-first architecture encourages knowledge sharing without restrictions, while AI capabilities drive improved user experiences. Rather than delivering comprehensive modules for specialized business processes (like HR, legal, or facilities), the company opts for a lightweight approach. This means businesses looking for extensive built-in features might find the product lacking. Reference customers spoke of the visibility of processes, the configuration management database, and hundreds of automations as their top-rated capabilities across the business, IT, and developers. Atlassian is a good fit for enterprises that need cross-departmental collaboration, product-centricity, and flow of knowledge across teams.

- **ServiceNow is an innovative, feature-rich, and scalable platform.** ServiceNow's strategy combines a commitment to innovation with fostering skills development. Its innovations continue to push the market forward, including features like change credit scores, process mining, benchmarking, and real-time integration with DevOps toolchains. The RiseUp initiative is helping organizations and individuals build the skills required to develop and manage the

employee productivity, and app creation, is leaning in on a one-platform approach that focuses on improving the employee experience and enterprise agility.

ServiceNow supports citizen development with a no-code app engine studio that will allow business users to develop microsites and add logic or automation. The newly launched Impact solution provides an additional level of support to ensure that organizations get the most out of their investments. Customers need the additional service because adoption of the platform can be complex — from pricing and contracts to implementation and ongoing maintenance. This may well be a side effect of a full-featured platform, but simplification can go a long way toward improving the overall customer experience and value realization. Reference customers are enthusiastic about the asset management capabilities; Employee Center Pro; and low-code and no-code capabilities to build, configure, and deploy quickly. ServiceNow is a good fit for organizations that require a robust and highly scalable ESM platform.

- **BMC is a comprehensive service operations solution for the enterprise.** BMC's strategy over the past few years has continued to close the gap between the Leaders in this market. Acquisitions like ComAround Knowledge (KCS verified) have helped it not only level up but, in many cases, surpass the competition. The BMC platform, while impressive in many aspects, has some noted limitations. The portfolio management and customer service features are not included in the ESM package, leading to additional costs for users interested in these capabilities. BMC's overall roadmap focuses on observability intelligence, AI-driven analysis, zero-touch resolutions, and proactive capabilities.

  The Innovation Studio's drag-and-drop capabilities underscore the product's user-friendly approach, allowing even those without IT expertise to create and manage workflows with ease. The extensibility of the platform can also be configured to connect with development tools with a bidirectional flow of information and, with portfolio management, can support product-centric organizations. From a value stream perspective, out of the box, the platform does not connect IT, developers, and business units as a single offering, which may limit collaboration across the enterprise. Reference customers are pleased with the flexibility of the platform and the ability to make changes to meet their needs with high speed of delivery and without highly trained engineers. However, customers also report that using other BMC products can be clunky, without seamless integration. BMC is a good fit for enterprise organizations that want a flexible approach to service operations and need to build their own apps — and want to combine this with robust ESM capabilities.

Strong Performers

- **Ivanti innovates with security but lacks robust reporting capabilities.** Ivanti's current shift toward bolstering its security offerings is distinctive. The strength of its endpoint management offering will be further enhanced with vulnerability detection, remediation, and incident filtering to help security teams prioritize their efforts and provide a detailed audit and robust data protection to ensure privacy. Ivanti's increased focus on security and response may widen the gap in functionality between the Strong Performers. Additionally, the vision of a partner ecosystem is in its infancy; substantial improvements are necessary. The customer adoption strategy seems more focused on packaging than implementation success, and the roadmap focuses on AI and usability. The vendor still caters to onboarding customers from Cherwell Service Management, indicating potential transition challenges.

  The non-IT workflows from the Cherwell acquisition have extended the platform to serve HR;

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the Ivanti platform still lacks reporting functionality compared with other vendors. Reference customers value the ability to embed automation into processes, the asset database, the flexibility to add functionality to extend the Ivanti platform, and the ease of upgrades. Ivanti is a good fit for organizations that want to better manage and secure assets within the enterprise service management approach.

- **IFS's breadth of ESM modules makes for a solid investment, but it must modernize.** IFS has a comprehensive suite of non-IT workflows, including HR, facilities, finance, security, logistics, fleet management, field service management, marketing, and legal. Knowledge sharing and collaboration are seamlessly integrated with features like FAQs, discussion forums, and collaboration areas. The product showcases strength in its ITSM, ESM, IT operations management (ITOM), and enterprise resource planning (ERP) modules with a vision to reduce total cost of ownership, provide unlimited licenses, merge ERP with ESM, and enhance automation. IFS has a clear roadmap for future enhancement, such as NL/AI search, text-to-report generation, and smart routing. Additionally, ongoing improvements to the UI and UX will help IFS catch up with competitors.

  The product boasts a robust workflow creator with templates, ensuring efficient task and workflow management. The API integration offers the flexibility to trigger workflows in other platforms, further enhancing interoperability. The product also helps manage risk with its impact and risk calculation tools and an ITOM suite for asset management. However, the IFS service desk agent experience (UX) is outdated, lacking the personalization that modern users expect. Reference customers value both the scalability of the platform and the ease of adoption. IFS is a good fit for organizations that want more than just ESM and rely heavily on ERP.

- **USU continues to expand its ESM capabilities, but development teams are excluded.** USU prides itself on using the SAFe approach to platform development. The ESM workflows are tailored for a range of departments, from HR and facility management to marketing and finance. The product supports user collaboration by launching a Teams chat channel directly from an incident and integrating all chat data into the ESM record. With AI, the software can identify trends and potential major incidents, optimize risk management related to changes, and even predict potential challenges using historical data. While USU offers an impressive array of features and functionalities aimed at enhancing ESM, the product does not integrate with development platforms, limiting its utility for organizations seeking a more unified IT and development ecosystem. The company's roadmap continues to drive improvements to close the gap with market leaders, such as genAI in knowledge management, analytics extensions, and an app platform approach (incident management app, change management app, etc.).

  Asset discovery is enhanced by its capability to amalgamate data from various vendors into a visual service tree. Knowledge sharing becomes intuitive through the service bot with guided dialogues with translations, making user support more effective for multilanguage organizations. Some of the graphical representations are complex and visually challenging, which may present a steep learning curve for new adopters. Reference customers enjoy the flexibility and stability of the platform but state that integration needs improvement. USU is a good fit for medium to large organizations that want core ITSM and enterprise service management but do not have a significant need for out-of-the-box integrations.

- **ManageEngine continues to improve its platform but still faces a considerable gap.** ManageEngine, a subsidiary of Zoho, is improving platform capabilities in the ESM market by

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affordable price point, driving increasing customer numbers. With a roadmap that includes enhanced templates, workflows, and automation — and more integrations with chat and developer toolchains — the platform is improving, but the gap between ManageEngine and the higher-scoring Strong Performers persists. The strategy of its product managers seems to be to continue to design a platform that can tie the business, IT, and developers together.

With the AI capabilities of the chatbot Zia, organizations can get help predicting categorization, subcategorization, items, priority, technician, and template usage. Knowledge management functionality has improved but still does not support the agile knowledge management methods in KCS. Change-risk scoring is still based on questionnaires and asset impact and does not yet use ML to help identify patterns related to change management success. Reference customers enjoy the robust reporting and find that the product developers are very responsive to the needs of the customer. ManageEngine is a good fit for value-oriented small and medium-size businesses that want a comprehensive IT management ecosystem.

- **OpenText acquires SMAX but doesn't share its roadmap publicly.** OpenText recently acquired Micro Focus and the SMAX ESM offering. Strongly rooted in IT service management, the platform only offers a few non-IT workflows, including HR, facilities, and security operations. Max, the virtual assistant, facilitates inquiries, ticket submissions, and interactions through a chat interface with Teams and captures conversations for future review. The vision for the product emphasizes sustainability and enhancing the overall employee experience. The product roadmap, essential for prospective planning, is not publicly shared, leaving potential new users and stakeholders in the dark regarding future developments and investments.

  The product offers customizable service desk views based on user roles, AI-enhanced categorization, and universal discovery for assets. The product's API framework supports varied integrations, including with ChatGPT. User options added to requests and approval processes are not intuitive, exposing raw code, which can be challenging for nontechnical users. While the platform has incorporated AI in some areas, its risk assessment for changes remains manual without AI automation. The feedback loop for product development is limited compared with other vendors but does emphasize capturing customer insights for innovation. Customers use the platform for its translation capabilities, employee-centric portal, and ease of adoption, with most functionality used out of the box. OpenText is a good fit for organizations that require core ITSM capabilities focused on improving the overall employee experience.

Contenders

- **Freshworks invests heavily in AI, but with a limited roadmap.** Freshworks provides the common HR, legal, and facilities ESM modules, but through customizable templates, businesses can swiftly set up their workspaces to meet underserved workflows. The platform vision emphasizes AI-first experiences, customer services, and proactive operational approaches. The innovation strategy primarily focuses on self-service and AI insights. However, some areas, like the roadmap development and partner ecosystem, could benefit from further expansion. Freshworks' product briefing for this evaluation did not comprehensively discuss the roadmap's development, project prioritization, and integration of customer and partner feedback.

  Freshworks integrates with other systems, allowing data transfer from platforms like Workday.

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relationships, problems, or root causes, but it can associate assets with incidents. The lack of a visual representation for asset dependencies in changes might be a limitation for some users. While Freshworks boasts a diverse partner ecosystem, it's not as extensive as some of its competitors. Customers praise the ease of adoption, low complexity, automation capabilities, and workflow design simplification. Freshworks is a good fit for small and midsize organizations that want to build or mature an ESM practice.

- **SolarWinds renews ESM focus but lacks ITSM functionality for large enterprises.** With an emphasis on ITOM, observability, and artificial intelligence for IT operations (AIOps), SolarWinds' vision focuses on managing incident sprawl, observability, AIOps, and integrating ITOM with ITSM. The product offers smart solutions that identify similar incidents, branch into problem management, and even suggest solutions linked to sentiments. The product seems to lean predominantly toward incident management, potentially sidelining its focus on ITSM or ESM. Furthermore, its transparent roadmaps consider customer feedback and voting and reflect a dedication to continuous improvement and client-centric innovation — but require substantial continued investment to close the gap with competitors.

  A standout feature is the capability to initiate remote sessions directly from a record, ensuring swift problem resolution. HR, marketing, and facilities are the primary non-IT workflows supported, and its virtual agent integrates with collaboration platforms like Teams and Slack, allowing users to view open tickets, create new incidents, and conduct global searches to retrieve pertinent services and articles. The introduction of runbooks streamlines complex workflows, assisting technicians in troubleshooting with step-by-step guidance. However, while its ESM partner ecosystem leverages the broader SolarWinds ecosystem, it still lags behind some competitors in terms of integration and maturity. SolarWinds' reference customers did not respond to Forrester's outreach for this evaluation. SolarWinds is a good fit for smaller companies or for companies that have made a significant investment in observability offerings from SolarWinds.

- **Zendesk is a low-cost ESM option that has not kept pace with the market.** Zendesk's platform seems to have moved away from ESM and now focuses more on customer sales and support — marketing heavily toward digital-first companies, companies investing in digital operations, and business process outsourcers. In 2022, it simplified its pricing, invested in regional operations, and made acquisitions in the AI space. Its roadmap includes strengthening its administration and building out its infrastructure and compliance.

  Zendesk has always provided an easy-to-use platform with broad channel support, including modern messaging, rules-driven chatbots, portals, pervasive automation, and embedded knowledge. Areas for improvement that would help secure a place in the ESM market include broader real-time intelligence and more robust workflow management. Zendesk has a strong market presence with more than 110,000 customers and is a good fit for organizations seeking a CRM system that can also help with internal support teams. Zendesk declined to participate in the full Forrester Wave evaluation process.

Challengers

- **Broadcom navigates a sea of M&A activity but has limited resources to improve ESM.** CA Service Management has been a long-standing ITSM product with sufficient functionality to support enterprisewide IT service management. However, it has made few improvements to the platform since being acquired by Broadcom. Customer complaints continue as reports of price hikes, poor customer service, lack of consistency across the platform, multiple changes

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With so much M&A activity, it is difficult to see the long-term strategy for CA Service Management in the broadening Broadcom portfolio.

The solution is now containerized, features a variety of UX improvements, and introduced drag-and-drop capability to increase ease of use. Without investment, Broadcom's platform continues to fall behind others in the market, broadening the ESM gap with other vendors. CA Service Management is a good fit for organizations that have investments in multiple Broadcom products, need ease of integration across the portfolio, and require lightweight ITSM capabilities. Broadcom declined to participate in the full Forrester Wave evaluation process.

Evaluation Overview

We grouped our evaluation criteria into three high-level categories:

- **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include non-IT workflows, low-code/no-code development, and deployment and integration.

- **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated vision, innovation, roadmap, partner ecosystem, adoption, pricing flexibility and transparency, and community.

- **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's revenue and number of customers.

Vendor Inclusion Criteria

Each of the vendors we included in this assessment has:

- **A multipurpose ESM platform.** We included only multipurpose ESM platforms that could connect knowledge workers across the enterprise, including employees, technology teams, and developers.

- **Relevance to Forrester clients.** Forrester clients often discuss the evaluated vendors and products in inquiries; alternatively, the vendor may, in Forrester's judgment, warrant inclusion because of technology, market presence, or client interest.

- **Product revenue.** Each evaluated vendor's market performance demonstrates that it is a significant player in the ESM market with annual revenues greater than $100 million.

Supplemental Material

Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows The Forrester Wave™ Methodology to evaluate participating vendors.

We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by August 11, 2023, and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with our vendor review policy, Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with our vendor participation policy and publish their positioning along with those of the participating vendors.

Integrity Policy

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