

VENDOR SELECTION MATRIX™

IT And Enterprise Service Management Solutions

The Top Global Vendors 2025

May 2025

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RESEARCH IN ACTION
independent research & consulting

> Foreword

Every year, Research In Action surveys 10,000+ enterprise IT and business decision makers in order to gain insights on strategy, investments and ongoing challenges of technology innovation in the IT and Marketing Automation realm. These surveys give us access to a wealth of direct and unfiltered feedback from the buyers.

As we navigate the IT and Enterprise Service Management (IT and ESM) landscape of 2025, the integration of Artificial Intelligence (AI) and Machine Learning (ML) within IT and ESM has emerged as a transformative force. These advanced technologies are revolutionizing how organizations manage and optimize their service delivery, enabling predictive analytics, automated decision-making, and intelligent problem-solving. By leveraging AI and ML, organizations are not only streamlining operations but also creating more engaging, efficient, and supportive work environments. At the same time, there is an unprecedented focus on enhancing the employee experience. This study delves into these pivotal trends, exploring how AI-driven innovations and a commitment to employee-centric strategies are reshaping the future of IT and ESM.

This Vendor Selection Matrix™ report provides you with a useful guide to important IT and ESM market trends and names the top vendors. These details are intended to help you make an informed decision about which vendors might best meet your needs. Enjoy reading it and reach out if you have questions.

To Infinity...and Beyond! Dr. Thomas Mendel



Dr. Thomas Mendel
Managing Director
Research In Action

researchinaction.org



Vendor Selection Matrix™ Methodology

Flywheel For Buyer Data And Reach At Scale

Insight from 250,000¹ buyers

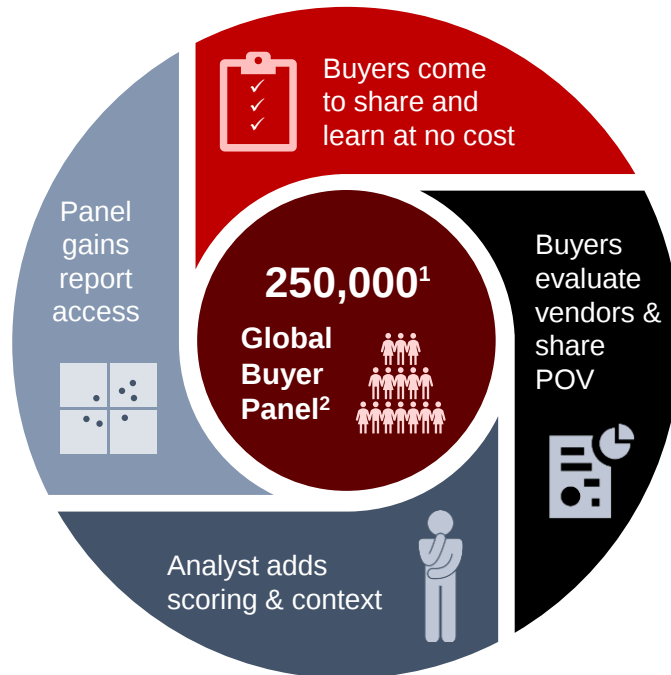
Our Global Buyer Panel² is comprised of technology decision-makers who agree to evaluate vendors and markets they know best in exchange for access to research results across markets. Decision makers must have budget authority from a company with > \$ 250 million revenue.

12,000+ buyers view each report

All 250k Global Buyer Panel members get free access to a certain number of reports. An average of **12,000+** buyers directly access each Vendor Selection Matrix™. Thousands more see the reports through vendor reprint distribution.

Analyst adds context and insights

In addition to adding their own vendor scoring, analysts author reports with commentary on each vendor as well as market analysis. Analyst opinion is informed by buyer data, vendor briefings, and independent market knowledge.

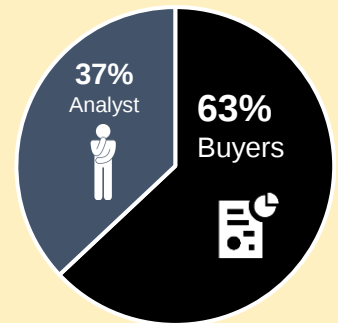


1,000+ evaluations per report

Each Vendor Selection Matrix™ includes **1,000** survey responses and 1,000+ vendor evaluations (some buyers evaluate more than one vendor.) A vendor must receive a minimum **15** evaluations to be included in the matrix.

Buyer-weighted scoring

63% of the vendor's score and matrix placement comes from buyer evaluations, **37%** from analysts.



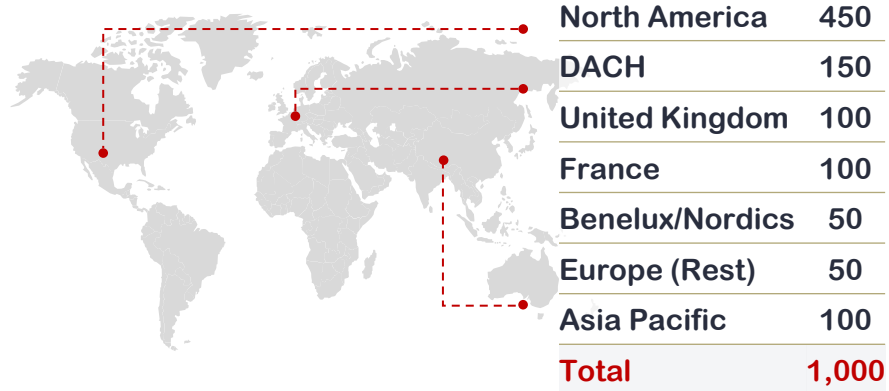
¹150k IT Automation +100k Marketing Automation

² Panel also used for custom vendor and buyer research projects



Survey Response Demographics For This Report

Geographies



Industries



Job Titles

VP IT Infrastructure	125
IT Manager	120
VP IT	100
Chief Information Officer	100
IT Operations Manager	75
VP Service Desk	75
Chief Technology Officer	55
Business Executive	50
Chief Digital Officer	50
Chief Operations Officer	50
Project Management Office	35
Sourcing And Vendor Management	25
VP Operations	25
VP IT Financial Management	25
VP Enterprise Architecture	25
Project Manager	25
VP Application Development	20
VP IT Shared Services	20
Total	1,000

Company Headcount



All companies have revenue > \$250 million





Vendor Scoring Criteria

Weighting: 63% Buyer Survey, 37% Analyst

STRATEGY			EXECUTION		
Vision And Go-To-Market	30%	› Does the company have a coherent vision in line with the probable future market scenarios? › Does the go-to-market strategy fit the target market and customers?	Breadth And Depth Of Solution Offering	30%	› Does the solution cover all necessary capabilities expected by customers?
Innovation And Differentiation	30%	› How innovative is the company in this market? › Does the solution have a unique selling proposition and clear market differentiators?	Market Share And Growth	15%	› How big is the company's market share and is it growing above the market rate?
Viability And Execution Capabilities	15%	› How likely is the long-term survival of the company in this market? › Does the company have the necessary resources to execute the strategy?	Customer Satisfaction	25%	› How satisfied are customers with the solution and the vendor today?
Recommendation Index	25%	› Would customers recommend this vendor in this market to their peers?	Price Versus Value Ratio	30%	› How do customers rate the relationship between the price and perceived value of the solution?

NOTES:

- 63% of the evaluation is based on the survey results, 37% is based on the analysts' assessment.
- 40% of the evaluation is based on the survey results: (1) Recommendation Index, (2) Customer Satisfaction, (3) Price Versus Value.
- 15% of the evaluation is based on the analysts' assessment: (1) Viability And Execution Capabilities, (2) Market Share And Growth.
- 45% of the evaluation is based on a combination of survey results and analysts' assessment: (1) Vision And Go-To-Market (2) Innovation And Differentiation (3) Breadth And Depth Of Solution Offering.
- Recommendation Index is based on responses to Q: "Would you recommend this vendor in this market to your peers - Yes or No?"





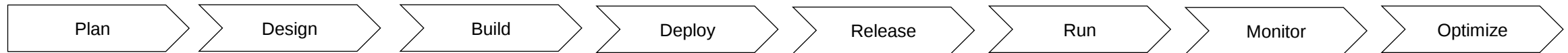
Technology Management

Market Coverage

Business Users And Stakeholders:

CUSTOMERS | SUPPLIERS | BUSINESS | EMPLOYEES | COMPLIANCE

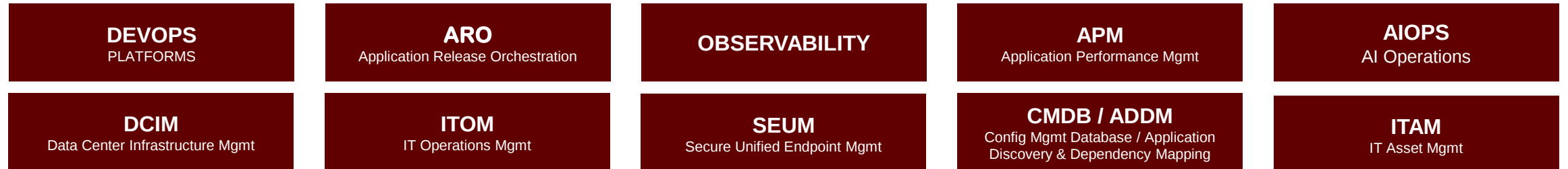
Connected Service Management



Service And IT Business Management



Application And Infrastructure Management



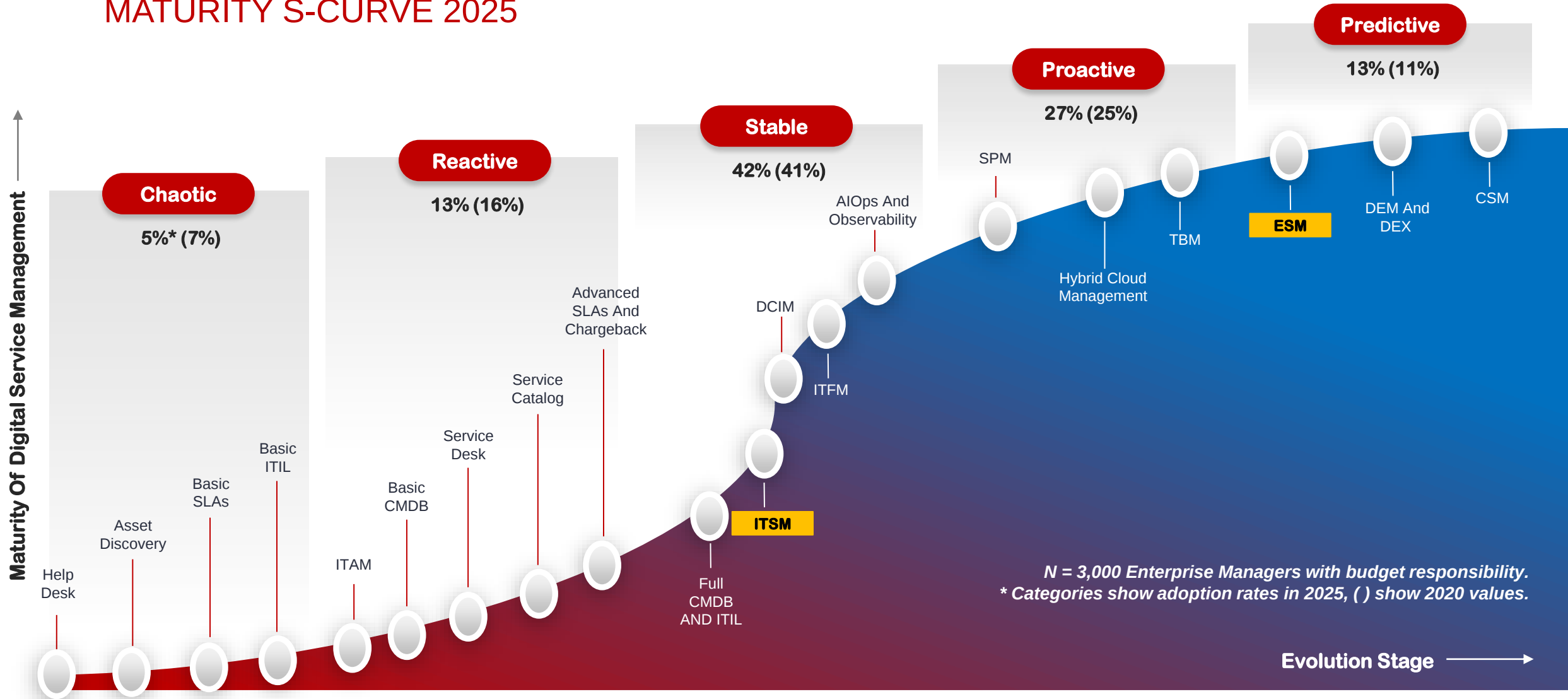
Resources:

DATA | APPLICATIONS | PLATFORMS | INFRASTRUCTURE | VENDORS | ASSETS | BUDGETS | LABOR



Connected Service Management

MATURITY S-CURVE 2025





IT And Enterprise Service Management Definitions

- Enterprise Service Management (ESM)¹ uses a variety of methods to improve the way individuals and teams throughout an organization develop, deliver, interact with, and consume applications and services across functional departments. The goal is to improve both employee productivity and effectiveness by automating many workflows.
- ESM has developed out of traditional IT Service Management (ITSM)², with the IT Infrastructure Library (ITIL)³ as the de facto standard for process definitions with a global penetration of around 90%. Today, organizations are leveraging practices developed from ITSM for automation and re-engineering of service processes.
- ESM solutions automate workflows, correlate, orchestrate data, manage assets and leverage intelligence to analyze, manage and deliver applications and services. While some solutions focus primarily on automating IT workflows (hence the name ITSM), other solutions automate business services in areas such as (1) human resources, (2) vendor management, (3) technical services, (4) field services, (5) financial management and (6) shared services organizations.
- An ESM solution should include, but is not limited to:
 - Centralize, integrate, optimize and enable the automation of enterprise services across an organization and its business functions for internal customers
 - Digitize the multitude of service processes through automation to achieve quality service experiences and continuous improvement
 - Standardize processes and workflows to optimize employee experience and their ability to serve external customers

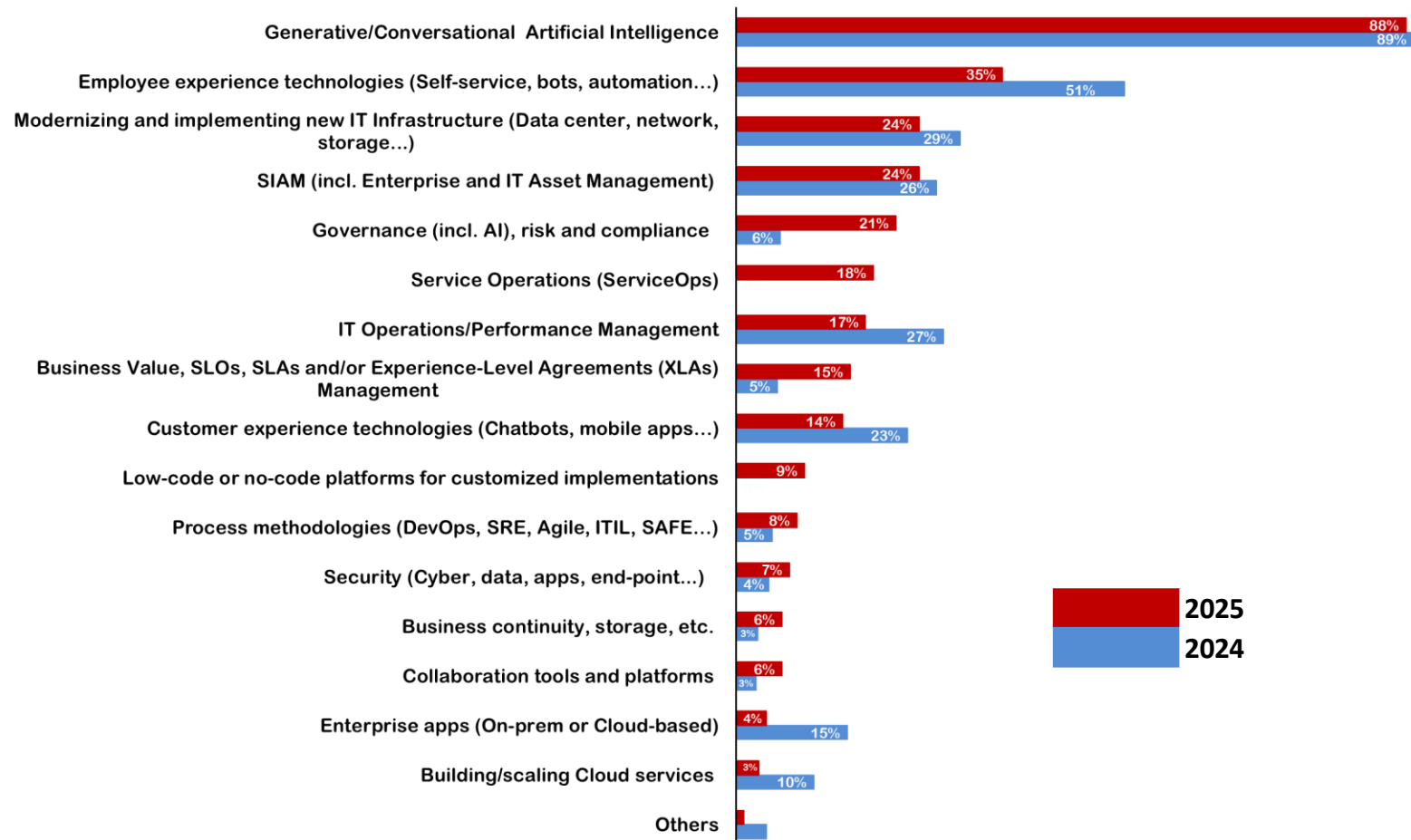
¹ Enterprise Service Management, see https://en.wikipedia.org/wiki/Enterprise_service_management.

² IT Service Management, see https://en.wikipedia.org/wiki/IT_service_management.

³ IT Infrastructure Library, see http://en.wikipedia.org/wiki/IT_Infrastructure_Library. ITIL is a trademark of AXELOS Limited.



Question: What are your top three investment areas related to IT and Enterprise Service Management in 2025 (2024)?



N = 1,000 Enterprise IT and Business Managers with budget responsibilities.

Of the 1,000 buyers who participated in our survey, 88% now see Generative/Conversational Artificial Intelligence as one of the three most important investment areas for 2025.

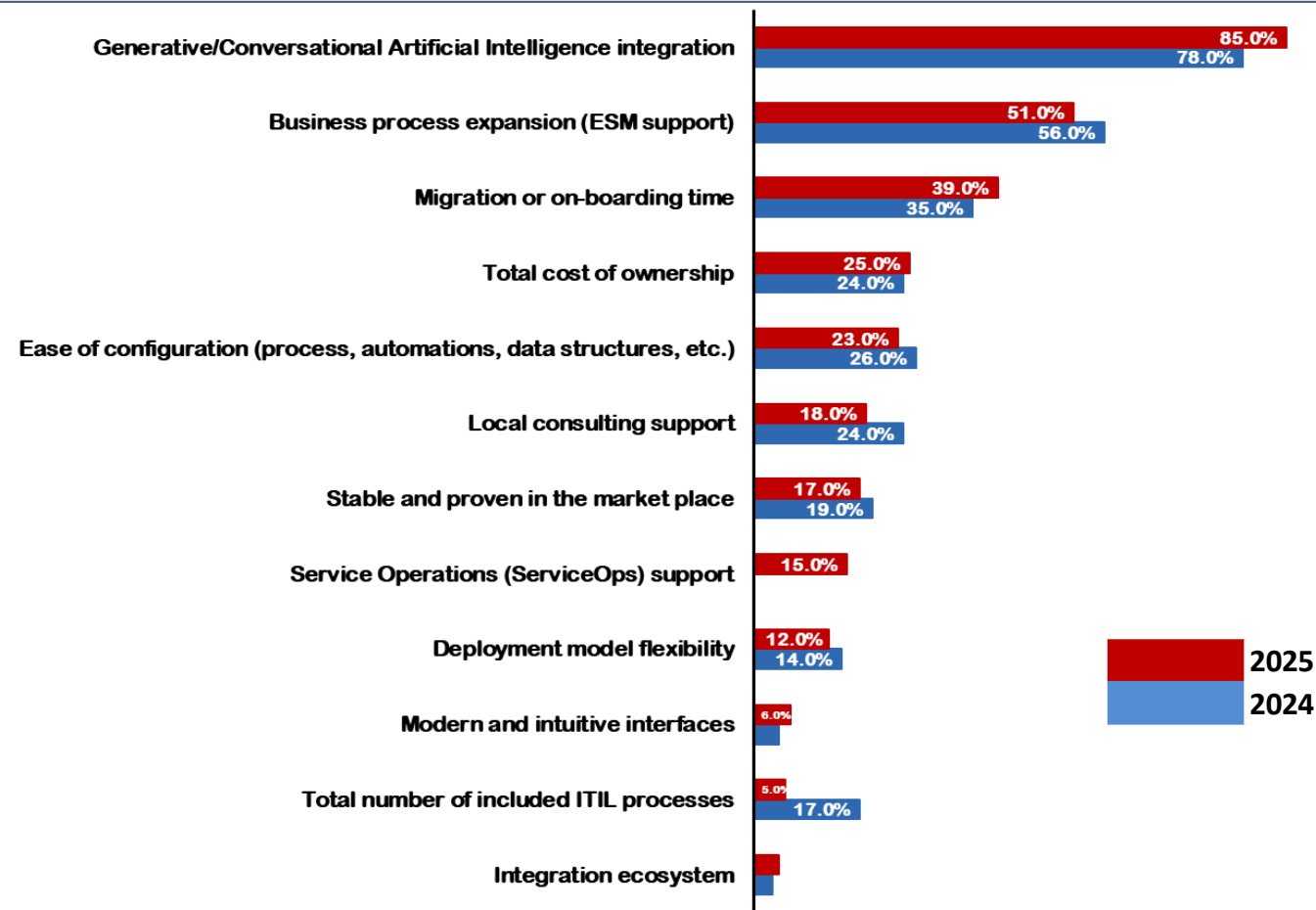
While down to 35% (from 51% in 2024), employee experience remain the second most important investment area.

Top three is the huge topic of modernizing and implementing new IT Infrastructure (also slightly down to 24% from 29% in 2024).

This is followed by Service Integration and Management (SIAM) with 24% and Governance (incl. AI), risk and compliance with 21% (a huge growth from only 6% in 2024).

There are also completely new topics: Service Operations (ServiceOps) with 18% on sixth position and Low-cod or no code platforms with 9% on 10th position.

Question: Which of the following three do you consider the most important capability of an ITSM solution?



Of the 1,000 buyers who participated in our survey, 85% now see the capability to integrate Generative/Conversational Artificial Intelligence as one of the three most important capabilities of an ITSM solution. This number is way ahead of the second most important feature, namely ESM support with 51% (slightly down from 56% in 2024).

The third most important consideration is the time it takes to implement a solution or migrate from one version to another. With 39%, this is still more than a third of companies (slightly up from 35% in 2024).

A concern about total cost of ownership (25%) and ease of configuration (23%) round up the top five.

N = 1,000 Enterprise IT and Business Managers with budget responsibilities.





Generative/Conversational AI Everywhere

Organizations and vendors are increasingly embedding Generative/Conversational AI and Machine Learning (ML) technologies into their ITSM and ESM tools to enhance their capabilities. Most organizations start with their ITSM processes, before they move to ESM. We expect a 12 -18 months delay here. For example, AI and ML are being utilized to drive predictive analytics, enabling IT teams to foresee and address potential issues before they escalate, AI-powered chatbots and virtual assistants are becoming prevalent, efficiently handling routine queries and service requests.

What this means:

The integration of AI and ML into ITSM and ESM tools signifies a transformative shift in how IT services are delivered and managed. By leveraging these technologies, organizations can automate decision-making processes and solve complex problems more effectively. Governance of AI will remain a huge concern for organization for years to come.



Modernization And Automation

Organizations will be aggressively modernizing their IT infrastructure through 2027 at least. Savvy one will be using new Service Integration and Management (SIAM) tools as well as robust automation technologies. End-to-end automation ensures that workflows are seamlessly managed across different systems and departments, eliminating manual intervention and reducing the likelihood of errors. IT service workflow automation is back in style due to its ability to enhance efficiency, reliability, and service quality while reducing costs and enabling IT departments to focus on more strategic initiatives.

What this means:

The resurgence of IT service workflow automation means that organizations are recognizing and leveraging its benefits to create more efficient, reliable, and high-quality IT operations.



Better Employee Experience

Organizations around the globe realize that they need to focus on retaining productive employees. Digital employee experience means to provide employees with seamless, efficient, and secure digital tools and environments. This trend reflects a strategic shift towards valuing employee experience as a critical factor in achieving broader business goals and maintaining a competitive edge in the digital age. Overall, the data suggests that organizations are returning to look at the optimization of internal operations which includes both employee and IT service workflows. Employees who are not bogged down by inefficient processes and can work more effectively are better equipped to serve customers.

What this means:

Improving employee experience through automation indirectly enhances customer experience by ensuring that employees have the time and resources to focus on customer needs.



VENDOR NAME	SOLUTION
AISERA	Aisera Agentic AI Platform
ATLASSIAN	Jira Service Management
BMC HELIX	BMC Helix Service Management
BROADCOM	CA Service Management
FRESHWORKS	FreshService
IBM	IBM Maximo
IFS	IFS ASSYST
INVGATE	Service Management
IVANTI	Ivanti Enterprise Service Management Platform
MANAGEENGINE	ManageEngine ServiceDesk Plus
MICROSOFT	System Center Service Management, Power Automate, Dynamics 365
OPENTEXT	Micro Focus Service Management Automation X, IT Operations Aviator
SERVICEAIDE	DSM, Luma AI, AI SM
SERVICENOW	ServiceNow Platform
SOLARWINDS	SolarWinds Service Desk
SYSAID	ITSM, Help Desk
TEAMDYNAMIX	TeamDynamix
USU	USU IT & Enterprise Service Management
XURRENT	Service Management Platform
ZENDESK	Zendesk Support Suite, Zendesk For Service, Zendesk For Work

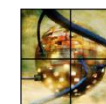
NOTE: If a vendor does not respond, Research in Action will complete its scoring assessment based on analyst experience and desk research. The vendor's products and quick facts will be documented in the report, though a full vendor scorecard will not be written.

This list is alphabetical and includes all relevant Enterprise Service Management vendors named by the survey respondents.

For this report we interviewed 1,000 enterprise IT and business managers with budget responsibility in enterprises globally. We selected those vendors which achieved the best evaluations scores from the buyers but disregarded those with fewer than 15 evaluations.

Additional vendors that were cited but did not list in the Top 20, or had less than 15 ratings:

- EASYVISTA
- HALO
- HORNBILL
- MATRIX42
- PROACTIVENET
- SAP
- SERVICEWARE
- SYMPHONYAI
- TOPDESK





	STRATEGY	EXECUTION	TOTAL
1. BMC HELIX	4.60	4.79	9.39
2. SERVICENOW	4.73	4.65	9.38
3. USU	4.71	4.64	9.35
4. BROADCOM	4.56	4.71	9.28
5. XURRENT	4.68	4.56	9.24
6. TEAMDYNAMIX	4.49	4.64	9.13
7. MANAGEENGINE	4.31	4.58	8.89
8. FRESHWORKS	4.38	4.50	8.88
9. SOLARWINDS	4.24	4.58	8.81
10. IVANTI	4.18	4.44	8.61
11. OPENTEXT	4.21	4.36	8.58
12. AISERA	4.29	4.21	8.50
13. INVGATE	4.06	4.36	8.43
14. ATLASSIAN	4.08	4.30	8.38
15. SYSAID	4.00	4.23	8.23
16. MICROSOFT	3.99	4.23	8.21
17. IFS	4.00	4.15	8.15
18. SERVICEAIDE	3.96	4.04	8.00
19. ZENDESK	3.89	4.08	7.96
20. IBM	3.96	3.95	7.91

Notes:

- Scale Explanation: 1 (Low) To 5 (High).
- Potential numerical deviations due to rounding.

USU is a market leader in IT and ESM and enables innovation across both IT and business operations.

GENERAL

USU GmbH is headquartered in Möglingen, Germany with customers around the world. The company was founded in 1977 and has continued its growth and expansion across regions, target markets and with partners. In December 2024, USU was acquired by Thoma Bravo. USU has over 650 employees and more than 1,200 customers. With a holistic solution portfolio for IT and Enterprise Service Management, USU addresses customers ranging from medium-sized businesses, large companies and IT service providers. The USU brand has achieved great recognition and popularity among IT and business decision-makers.

STRATEGY

USU's current strategy around their IT & Enterprise Service Management solution focuses on driving innovation and automation across both IT and business operations. By centralizing their development and solution teams, USU has transformed into a robust platform provider that integrates advanced AI technologies and offers low-code/no-code capabilities. This platform includes domain-specific applications, management modules for ecosystem control, and enhanced UI/UX for seamless user experiences. USU aims to accelerate service development and delivery, ensuring comprehensive workflow automation and achieving high customer satisfaction. USU has received the highest score in our Recommendation Index.

EXECUTION

USU's strategy focuses on integrating diverse functionalities into a unified platform, aiming to elevate user experience, enhance operational efficiency, and maximize value for customers. The company prioritizes the SaaS delivery model, ensuring scalability, flexibility, and cost-effectiveness to meet evolving market demands. Additionally, USU has expanded its market presence through strategic partnerships and investments in new technologies, including significant contracts and enhancements to its service management offerings. The company's ability to provide tailored on-premises solutions, especially for the public sector, further highlights its commitment to delivering practical and user-friendly solutions. The survey respondents have given USU the highest score for both customer satisfaction and price versus value ratio.

BOTTOM LINE

USU offers a comprehensive, AI-driven platform that seamlessly integrates with various business functions to streamline processes and enhance service delivery. The acquisition by Thoma Bravo has by far and large been perceived by the buyers surveyed as a very positive sign for future innovation and growth. USU has achieved the second highest score for breadth and depth of its solution offering.



STRATEGY	RESULT
Vision And Go-To-Market	4.75
Innovation And Differentiation	4.75
Viability And Execution Capabilities	4.50
Recommendation Index	4.75
	4.71
EXECUTION	RESULT
Breadth And Depth Of Solution Offering	4.75
Market Share And Growth	4.00
Customer Satisfaction	4.75
Price Versus Value Ratio	4.75
	4.64

- NOTES:
- Scale Explanation: 1 (Low) To 5 (High).
 - Recommendation Index is based on responses to Q: "Would you recommend this vendor in this market to your peers - Yes or No?"
 - Potential numerical deviations due to rounding.

Vendor Selection Matrix™ Methodology

Every year, Research In Action surveys **10,000+ enterprise IT and business decision makers** in enterprises globally to gain insights on strategy, investments and ongoing challenges of technology innovation in the IT and Marketing Automation realm.

Survey data provides a wealth of direct and unfiltered feedback from the buyers including how buying decisions are made in today's business environment.

The Vendor Selection Matrix™ is a **primarily survey-based methodology** for vendor evaluation, where 63% of the evaluation is based on a survey of enterprise IT or business decision makers and 37% on the analyst's judgement.

The analyst's input is fed by a combination of intensive interviews with software or services vendors and their clients, plus their informed, independent point-of-view as an analyst. All of this combines to make Research in Action **Vendor Selection Matrix™ reports so unique.**



75,000+
Data Points



1,000
Enterprise Managers



37%
Analyst's Opinion



63%
Survey Results

The Vendor Selection Matrix™ Evaluation Methodology:

The basis of our competitive vendor evaluation reports is always an extensive buyer survey.

We then select those vendors which achieved the best evaluations scores from the buyers but disregard those with fewer than 15 evaluations.

The final matrix scores are a combination of the survey results, vendor input and analyst's opinion.



Vendor Selection Matrix™ Disclaimer

The Vendor Selection Matrix™ is a primarily survey-based methodology for comparative vendor evaluation.

Research In Action GmbH does not endorse any vendor, product or service depicted in our research publications, and does not advise technology users to select only those vendors with the highest ratings.

The information contained in this research has been obtained from both enterprise as well as vendor sources believed to be reliable.

Research In Action GmbH's research publications consist of the analysts' opinions and should not be considered as statements of fact.

The opinions expressed are subject to change without further notice.

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About **Research in Action**

www.researchinaction.org

Research In Action is a global research and consulting company providing enterprise buyers and vendors with forward-looking and practical advice on technology management and marketing automation.

The company was founded in 2011 by former Forrester executive Dr. Thomas Mendel, and soon joined by other Forrester leaders, to offer a different approach to industry analysis, including a greater emphasis on data from technology buyers.



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Dr. Thomas Mendel
Managing Director



Peter O'Neill
Research Director

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➤ APPENDIX: IT AUTOMATION DEFINITIONS

Application Discovery and Dependency Mapping (ADDM) solutions automatically discover various applications running on server and network devices within the business hybrid infrastructure and maps the dependencies between them providing a holistic view of all the resources running and the relationships between them.

Application Performance Management (APM) solutions manage the performance and health of applications within an IT enterprise.

Artificial Intelligence and Machine Learning (AI/ML) are both technologies and are leveraged in automation solutions. Artificial intelligence (AI) is the ability of a computer program or machine to think and learn (AI can mimic human cognition). Within IT Automation AI is used to correctly interpret a variety of data, to learn from such data and to use those learnings to achieve specific goals and tasks through flexible adaptation. Machine learning enables computers with the ability to learn without being programmed (explicit algorithms). It explores the study and construction of algorithms which can learn and make predictions on data. The algorithms follow programmed instructions or can make predictions or decisions based on the data. Machine learning is used when explicit algorithms cannot be done (e.g., computer vision, search engines, optical character recognition).

Artificial Intelligence for Operations (AIOps) solutions equip IT enterprise teams with analysis of volumes and categories of data to improve key processes, tasks and decision making. The adoption of these tools automates the ingestion of fast volumes of data; leverage machine learning to analyze the data, present findings to either predict or alert on issues and leverage the knowledge for automation or decision making.

Application Release Orchestration (ARO) solutions equip IT enterprise organizations and their teams with the automation of the software deployment cycle across hybrid technology environments.

Configuration Management Database (CMDB) is a database which captures IT components referred to as configuration items (CIs), which can be software, hardware, a document, article, or any such item that is part of the information system of the organization.

Connected Service Management (CSM) platforms or solutions are part of the management domain which manage the entire spectrum of customer, employee and digital experiences.

Continuous Integration/Continuous Delivery (CI/CD) is a software development practice that automates the integration and delivery of code changes. Continuous Integration involves regularly merging code changes into a shared repository, followed by automated testing to detect issues early. Continuous Deployment/Delivery ensures that these tested changes are automatically deployed to production (in the case of CD) or delivered to staging environments for further testing and review (in the case of Continuous Delivery).

Data Center Infrastructure Management (DCIM) refers to technologies and practices associated with the observation, diagnostic and predictive analysis and remediation of problems and anomalies associated with the computational, physical and economic dimensions of data center infrastructure.

Digital Automation and Management (DAM) refers to the comprehensive strategies, tools and processes utilized to streamline, automate and optimize various aspects of business and IT digital operations and business processes.

Digital Experience Analytics (DXA) is software that provide advanced insights into digital customer experiences and intentions within and across web, app and other types of digital pages.

Digital Experience Monitoring (DEM) is software that optimizes app performance, proactively prevent interruptions in digital experiences and ensure seamless user interactions across all digital touchpoints.

Digital Employee Experience (DEX) solutions manage and improve the entire digital environment that employees interact with as part of their daily work tasks.



➤ APPENDIX: IT AUTOMATION DEFINITIONS

IT Asset Management (ITAM) software manages the full lifecycle of IT assets which typically includes all software, hardware, networking, Cloud services, and client devices. In some cases, it may also include non-IT assets such as buildings or information where these have a financial value and are required to deliver an IT service. IT asset management can include operational technology (OT), including devices that are part of the Internet of Things. These are typically devices that were not traditionally thought of as IT assets, but that now include embedded computing capability and network connectivity.

IT Financial Management (ITFM) software enables the alignment of IT investments with business goals, optimize costs, and demonstrate the value of technology expenditures through transparent financial and operational metrics. NOTE: Technology Business Management (TBM) is part of this market.

The IT Infrastructure Library (ITIL) is the de facto standard for IT Service Management process definitions today.

IT Operations Management (ITOM) solutions monitor and control IT Services and infrastructure and enable IT to execute routine tasks necessary to support the operation of applications, services and hardware components within an organization; typically included are the provisioning of IT infrastructure, capacity management, cost-control activities, performance and security management and availability management for all IT infrastructure and assets.

IT Service Management (ITSM) refers to the entirety of activities – directed by policies, organized and structured in processes and supporting procedures – that are performed by an organization to plan, design, deliver, operate and control Information Technology (IT) services offered to internal customers. It is thus concerned with the implementation of IT Services that meet customers' needs, and it is performed by the IT service provider through an appropriate mix of people, process and information technology.

Observability solutions enable the aggregating, correlating and analyzing of steady streams of performance data from distributed applications and the hybrid infrastructure which support the applications.

Robotic Process Automation (RPA) solutions enable the automation of tasks, processes and procedures which are normally conducted by a human. RPA solutions create software robots that mimic human actions. Typically, these are tasks that a human would do. (Ro)Bots and Virtual Agents are part of RPA solutions.

Secure Unified Endpoint Management (SUEM) software enables the management and securing of mobile applications, content, collaboration and provides for the management of all endpoints like smartphones, tablets, laptops, printers, ruggedized devices, Internet of Things (IoT) and wearables.

Service Integration and Management (SIAM) software enables to efficiently manage and integrate multiple internal and external service providers to enhance service delivery and support dynamic sourcing models.

Strategic Portfolio Management (SPM) provide a centralized enterprise environment for collaboratively aligning strategy and execution across business and technology portfolios through functionalities for strategy definition, portfolio governance and modeling, adaptive strategic planning, execution monitoring and integration with other systems.

Value Stream Management Platform (VSMP) software solutions capture, visualize, and analyze the flow of work across the entire Agile software delivery project. The capabilities include end-to-end visibility, traceability and governance over the entire process and help to plan, track, and steer work at the team, program, portfolio, and enterprise levels. It includes the people working on a project, the systems which are operated and leveraged, and the flow of information and materials between teams. It enables the measurement of speed and quality for digital transformations.

