

# VENDOR SELECTION MATRIX™ IT AND ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

The Top Vendors For German  
Upper Midmarket Companies 2023

March 2023

ABRIDGED VERSION WITHOUT FULL SCORECARDS AND SCORES

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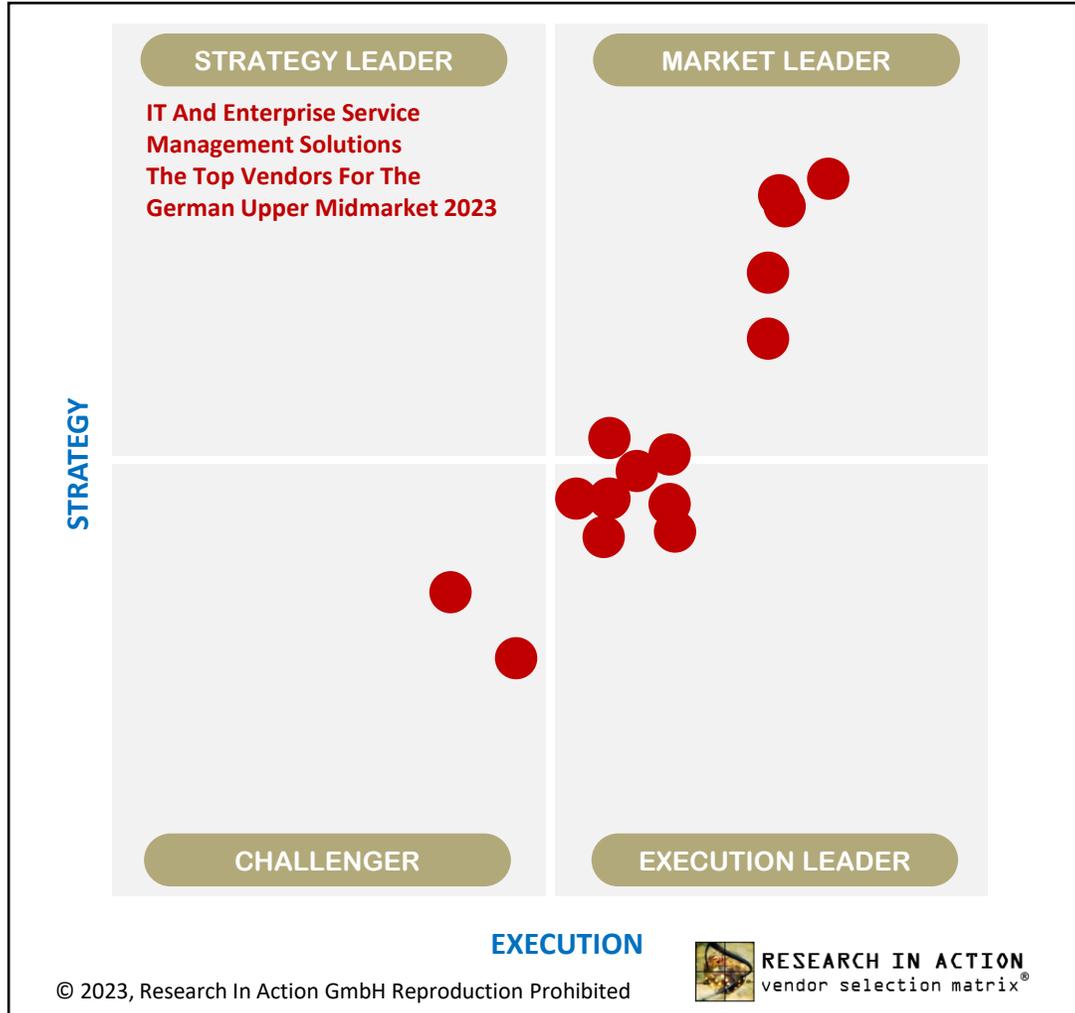


**RESEARCH IN ACTION**  
independent research & consulting

# VENDOR SELECTION MATRIX™

## IT AND ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

### THE TOP VENDORS FOR GERMAN UPPER MIDMARKET COMPANIES 2023



#### Market Leader

BMC SOFTWARE  
FRESHWORKS  
MATRIX42  
SERVICENOW  
SERVICEWARE  
SOFTEXPERT  
SOLARWINDS

#### Execution Leader

DESKCENTER  
KYBERNA  
MICROSOFT  
OMNINET  
REALTECH  
SERVICEAIDE

#### Challenger

IET SOLUTIONS  
MANAGEENGINE

**Note:** Vendors are listed alphabetically.



# 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. It also helps us to understand 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**. This approach is one of the key differentiators of Research In Action in market research. For this report, we interviewed 750 enterprise IT and business managers with budget responsibility in the German upper midmarket\*. We selected those vendors which achieved the best evaluations scores from the buyers but disregarded those with fewer than 15 evaluations.

What has become increasingly clear over the past year is that an organization's ability to adapt and change, and its ability to deliver on a core mission, is highly dependent on, and vulnerable to, how automated, secure and optimized its workflows are. Yet for all ITs genius in automating existing IT Services and leveraging modern Enterprise Service Management (ESM) technologies and data, some IT teams have partnered with or enabled their business teams to automate their workflows toward the goal of becoming a digital organization. The desire for a digital business has accelerated a fundamental shift in the ownership of intelligent workflow automation and digitization in enterprises worldwide. The old certainties of automating processes and services only within IT and the adopting of the necessary technologies and solutions are no longer true. Now IT technologies, non-IT and changemakers challenge the need for workflow automation to be done for other services outside of IT, leaving some IT teams disorientated and at real risk of being left behind.

However, there is also evidence to suggest the opposite: Digital transformation is driving the need for ESM and dedicated ESM roles and journeys. The ESM journey is supported by many vendors offering workflow automation solutions. Our research shows that ESM is sticking with enterprises and the vendors in this space have adapted their solutions and offerings towards this fascinating and evolving ESM market.

This Vendor Selection Matrix™ report provides you with a useful guide to important 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

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\* The German upper midmarket, der "deutsche gehobene Mittelstand" includes companies with a minimum of € 50 million annual revenue. Excluded are PLCs (AGs) as well as government, public sector and non-profit organizations..



# OUR SURVEY DEMOGRAPHICS: IT AUTOMATION IN GERMAN UPPER MIDMARKET COMPANIES

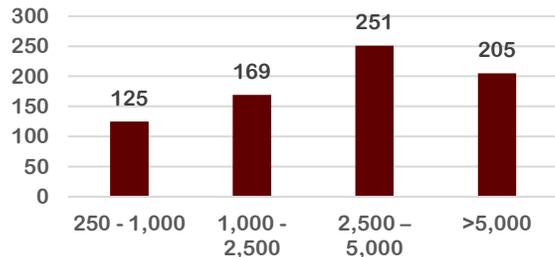
## Country Breakdown



Germany  
750

## Company Size Breakdown

(Revenue more than € 50 millionen p.a.)



Midmarket



Employees

All Research in Action surveys are gender neutral and 100% confidential.

## Industry Breakdown

Energy	60
Financial Services	125
Government & Non Profit	0
Life Sciences	100
Manufacturing	220
Technology, Media, & Telecoms	75
Consumer Packaged Goods & Retail	55
Professional Services	75
Travel & Transportation	40
<b>Total</b>	<b>750</b>

## Job Title Breakdown

IT Manager	110
IT Operations Manager	105
VP Service Desk or Help Desk	100
VP IT Infrastructure	90
Managing Director	80
Project Manager	65
VP Purchasing	45
VP Automation	30
VP Shared Services	25
VP IT	20
VP Process Management	20
CIO	17
VP Change Management	14
CTO	12
VP Application Performance Management	10
Other	7
<b>Total</b>	<b>750</b>



90,000+  
Data Points



750  
IT 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.



# OUR MARKET IMPACT OVER 12 MONTHS



**Vendor Selection Matrix™: The right mix makes all the difference**  
**63% customer evaluations + 37% analyst's judgement = 100% success**



# WHAT IS IT AND ENTERPRISE SERVICE MANAGEMENT?

- Enterprise Service Management (ESM)<sup>1</sup> 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)<sup>2</sup>, with the IT Infrastructure Library (ITIL)<sup>3</sup> as the de facto standard for process definitions with a global penetration of around 90%.
- While some organizations are leveraging practices developed from ITSM, others are automating while re-engineering tasks, processes and/or decisions without using ITSM.
- ESM solutions automate workflows, correlate and orchestrate data and manages assets, and leverage intelligence to analyze, manage and deliver applications and services. While some solutions focus primarily on the 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, (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

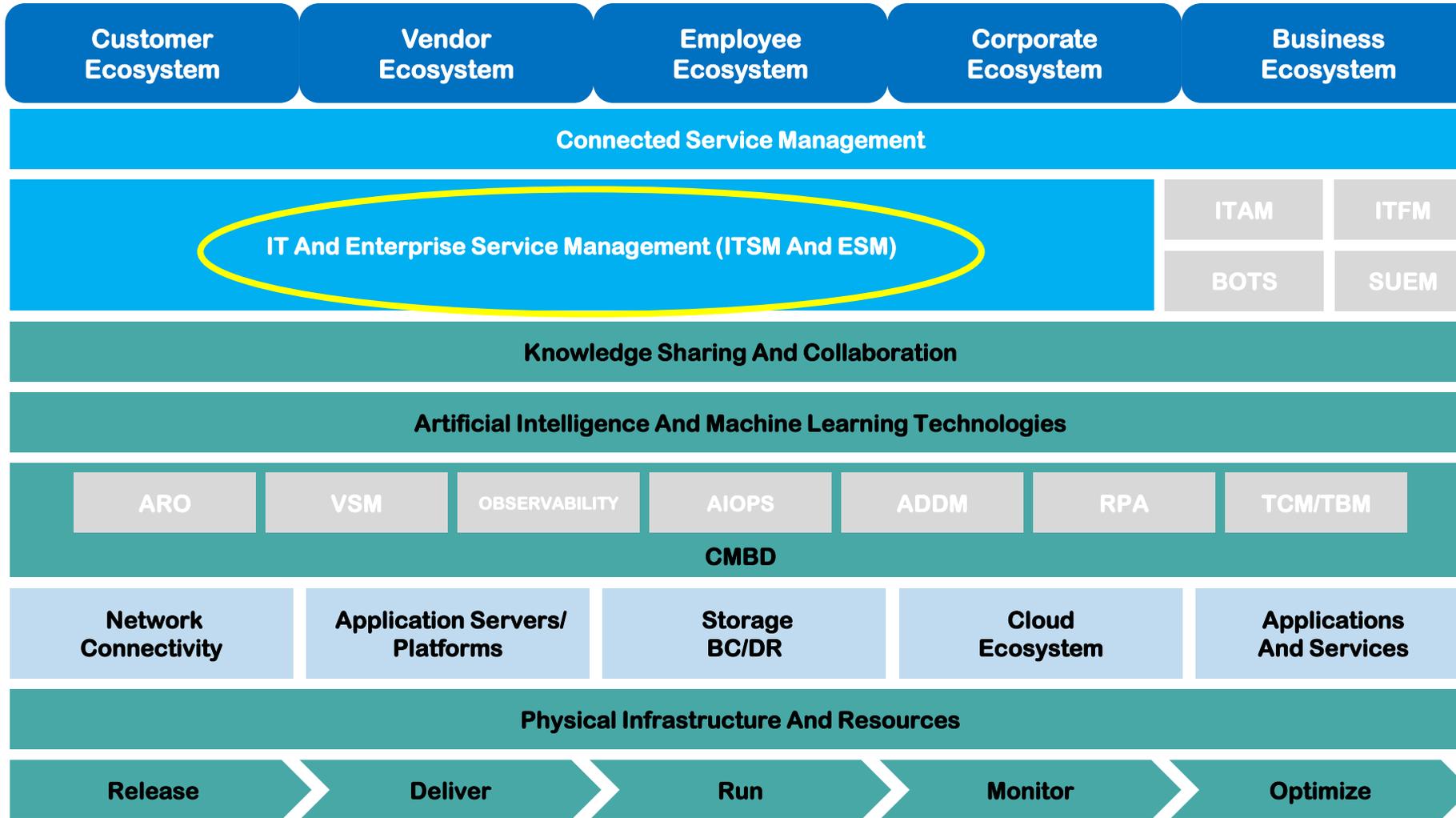
<sup>1</sup> Enterprise Service Management, see [https://en.wikipedia.org/wiki/Enterprise\\_service\\_management](https://en.wikipedia.org/wiki/Enterprise_service_management).

<sup>2</sup> IT Service Management, see [https://en.wikipedia.org/wiki/IT\\_service\\_management](https://en.wikipedia.org/wiki/IT_service_management).

<sup>3</sup> IT Infrastructure Library, see [http://en.wikipedia.org/wiki/IT\\_Infrastructure\\_Library](http://en.wikipedia.org/wiki/IT_Infrastructure_Library). ITIL is a trademark of AXELOS Limited.



# THE IT AUTOMATION MARKET TEXTURE



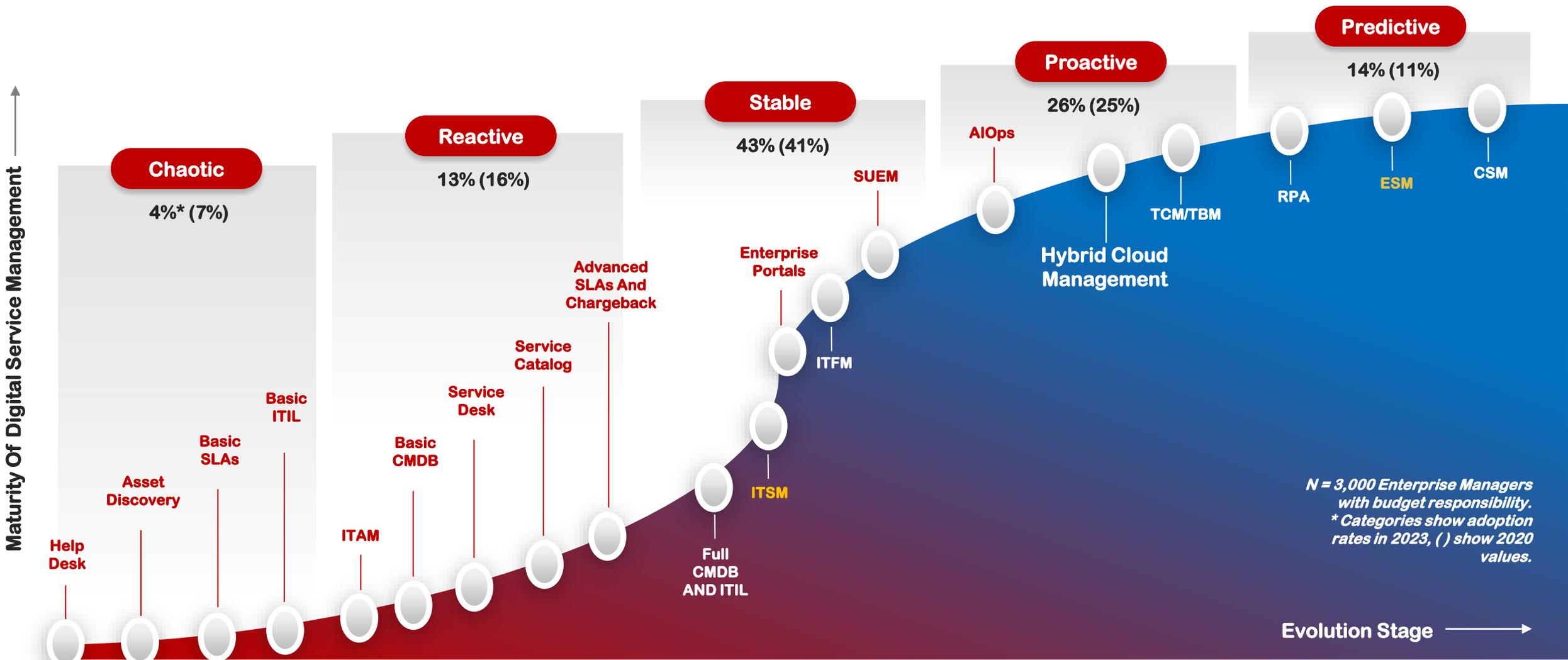
IT Automation solutions are necessary for a modern digital operating model.

IT Automation solutions are foundational for any transformation to reduce toil and decrease manual errors.

IT Automation solutions can enforce good practices to optimize digital service quality and speed of service delivery.

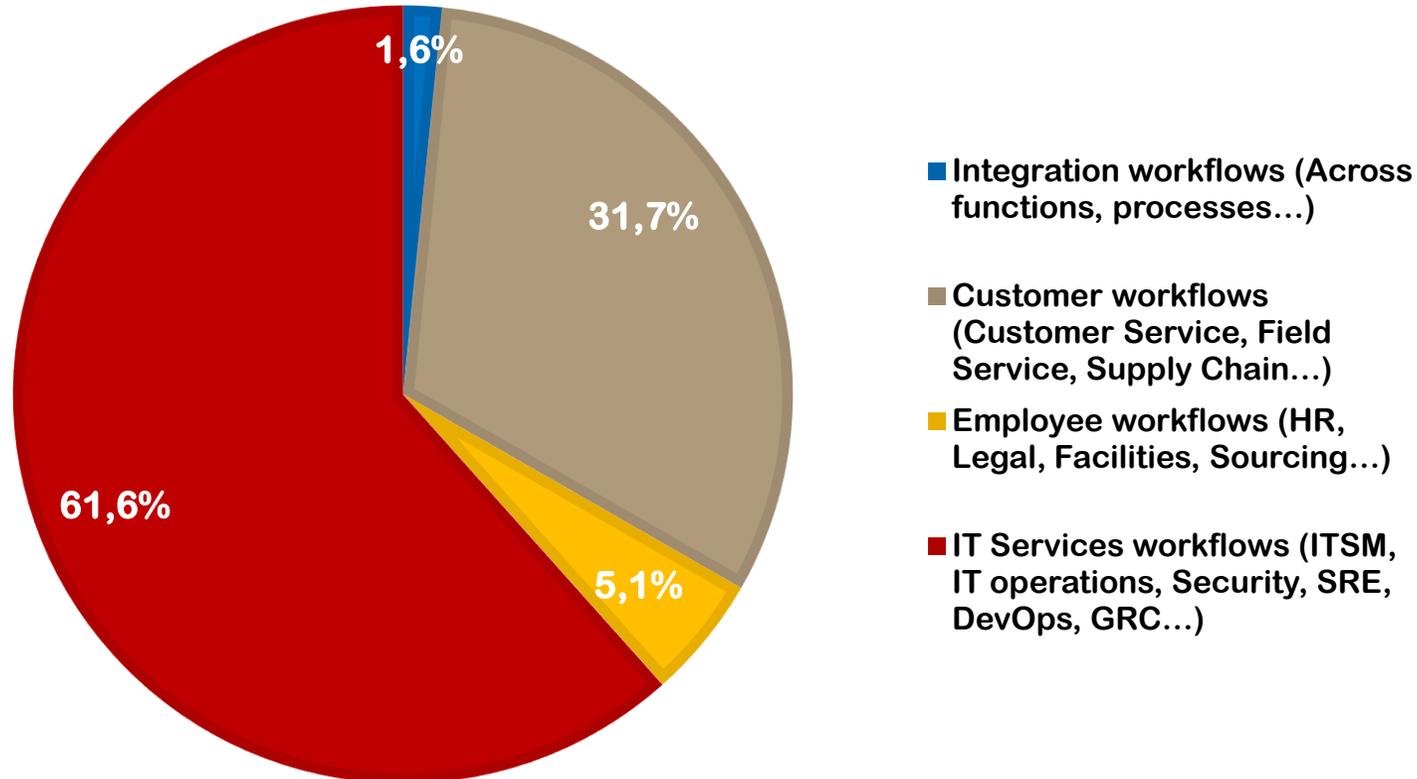


# WELCOME TO THE CONNECTED SERVICE MANAGEMENT MATURITY S-CURVE 2023



# RESEARCH:

## GERMAN UPPER MIDMARKET IT & ESM PRIORITIES FOR 2023: IT SERVICES WORKFLOW AUTOMATION IS THE TOP PRIORITY



N = 750 IT and Business Managers with budget Responsibilities in the German upper midmarket.

Question:  
Which domain is your highest priority for the automation of workflows within the next 12 month?

**Automating IT Services Workflows Remain The Top Priority For German Upper Midmarket Companies.**

**The automation of IT Services workflows will remain the highest priority for automation across German upper midmarket organizations in 2023.**

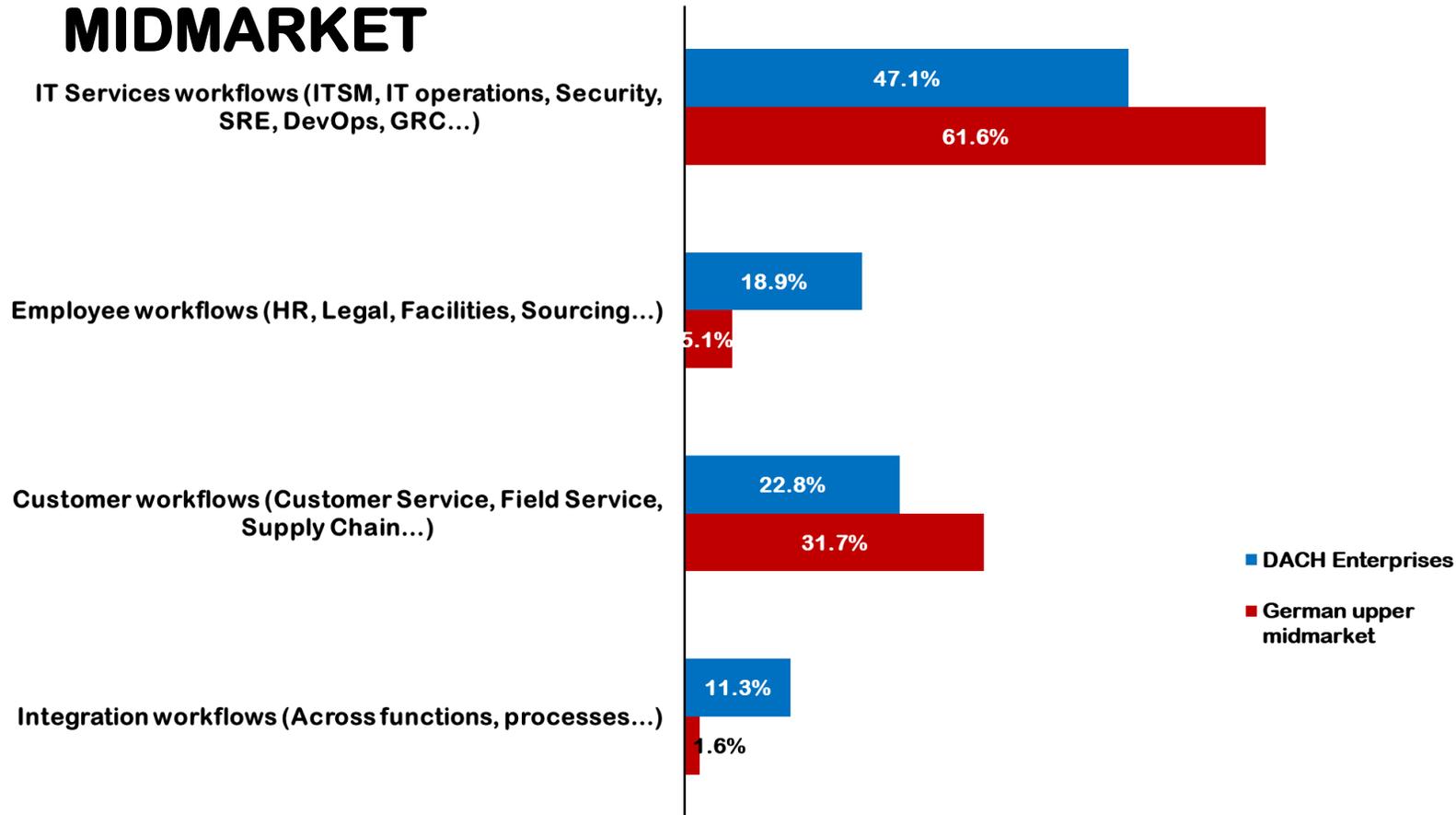
**The second highest priority for automation across the board is the automation of customer workflows.**

**Employee workflows are the third highest priority for German upper midmarket organizations in 2023, and integration workflows are not yet very important.**



# RESEARCH:

## PRORITY DIFFERENCES BETWEEN DACH ENTERPRISES AND THE GERMAN UPPER MIDMARKET



N = 1,500 IT and Business Managers with budget Responsibilities in DACH enterprises and the German upper midmarket.

Question: Which domain is your highest priority for the automation of workflows within the next 12 month?

### The Automation Of Workflows Differs Between DACH Enterprises And The German Upper Midmarket.

The highest automation priority (62%) for German upper midmarket companies is the IT Services workflows, followed by 32% for customer workflows and 5% for employee workflows.

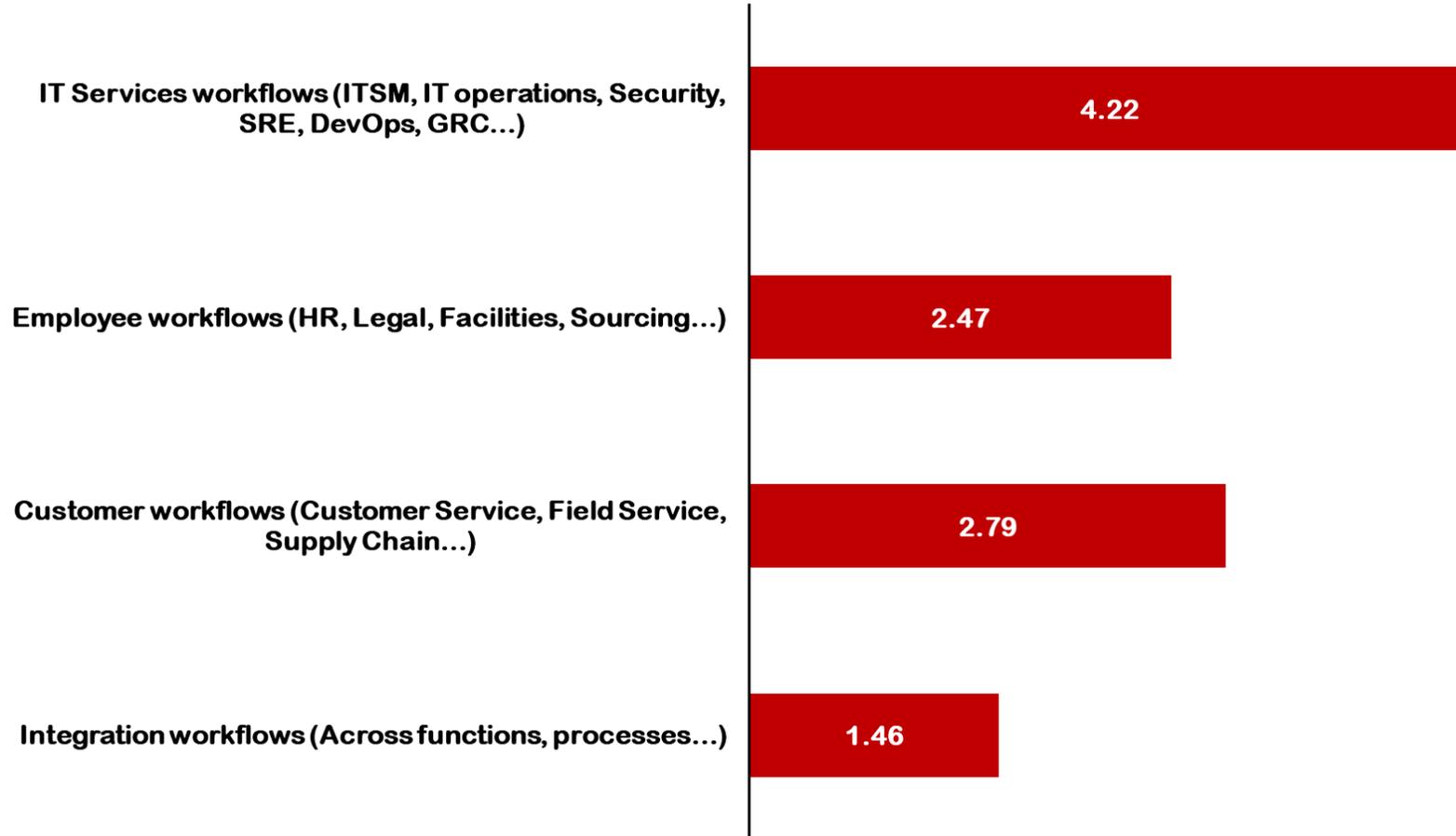
While DACH enterprises also prioritize their IT Services workflows (47%), they place higher priority on customer workflows (23%) and employee workflows (19%) for 2023.

Integration of workflows across functions and processes is a higher priority for DACH enterprises (11%) than for German upper midmarket companies.



# RESEARCH:

## THE GERMAN UPPER MIDMARKET MATURITY STATE OF IT & ESM:



N = 750 IT and Business Managers with budget Responsibilities in the German upper midmarket.

Question:  
At what level of automation would you say are you within these domains?

### IT Services Workflows Are The Most Mature In The German Upper Midmarket Today.

There is still a huge emphasis on ITSM in the German upper midmarket today. However, ESM is starting to gain a lot of traction, yet still lagging both global and DACH enterprise significantly.

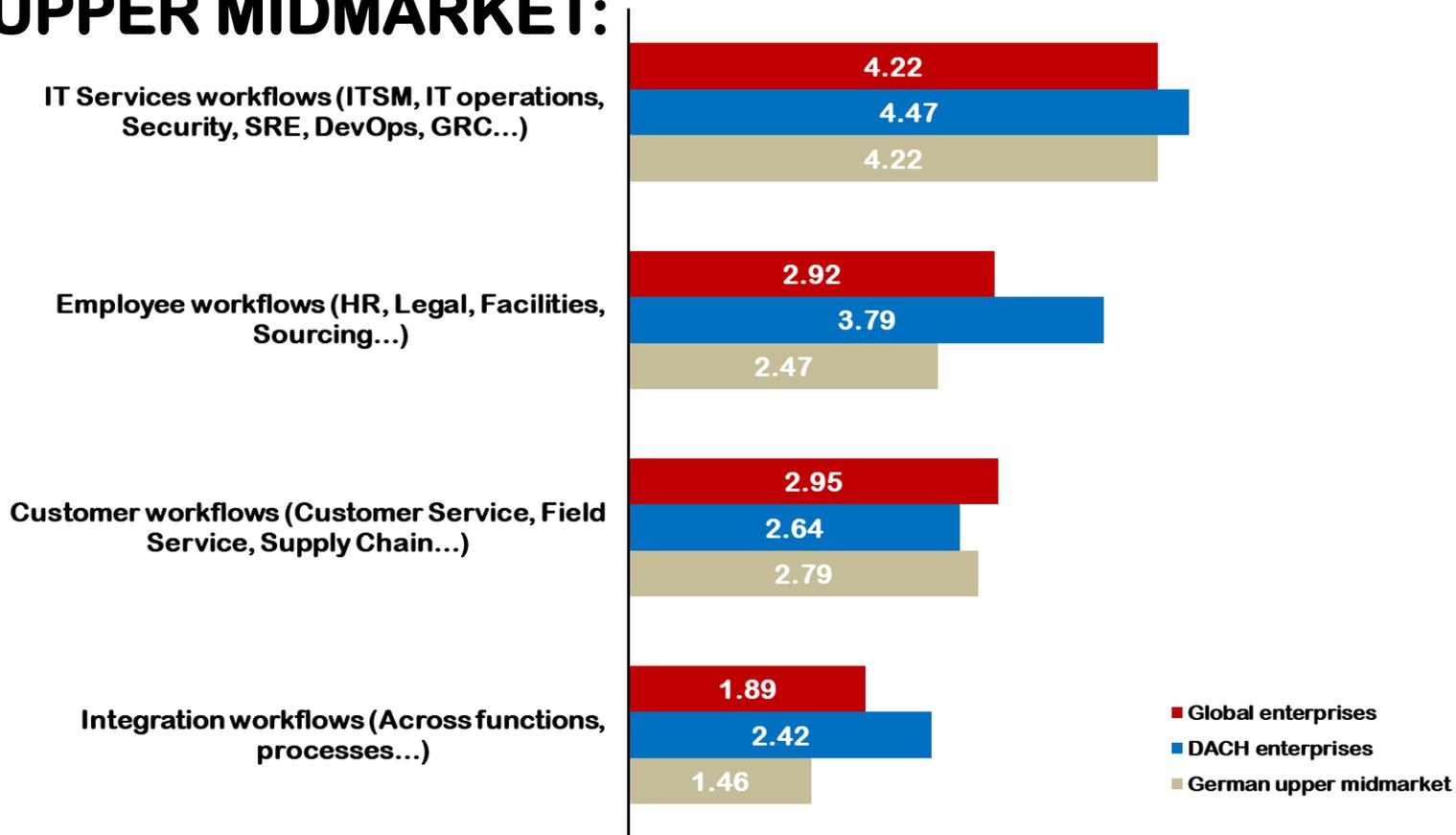
#### Maturity Scale:

- 1 - Just started
- 2 - At about 25%
- 3 - At about 50%
- 4 - At about 75%
- 5 - More than 75% automated



# RESEARCH:

## MATURITY STATE COMPARISON BETWEEN GLOBAL AND DACH ENTERPRISES AND THE GERMAN UPPER MIDMARKET:



IT Services Workflows And Employee Workflows Are The Most Mature In DACH Enterprises Compared To Global And German Upper Midmarket Organizations.

### Maturity Scale:

- 1 - Just started
- 2 - At about 25%
- 3 - At about 50%
- 4 - At about 75%
- 5 - More than 75% automated

N = 3,000 IT and Business Managers with budget Responsibilities in global and DACH enterprises And the German upper midmarket.

Question: At what level of automation would you say are you within these domains?



# WHAT THE DATA MEANS: THE GERMAN UPPER MIDMARKET MUST FOLLOW THE TREND IN DACH ENTERPRISES TO MOVE TOWARDS ESM WITH THE GOAL OF IMPROVING THE SERVICE EXPERIENCE FOR EMPLOYEES AND CUSTOMERS



**The benefits of workflow automation are opportunities not concerns.**

While there are opportunities for workflow automation in business functions such as HR, legal, and facilities, and it can allow for employees to shift to a more creative and meaningful work, there are still concerns. One major concern is the potential replacement of human labour, which may have significantly slowed down the adoption of business workflow automation in Germany in the past. However, DACH enterprises are more mature than their global or German upper midmarket counterparts when it comes to employee workflow automation and have successfully overcome these concerns.



**German upper midmarket organizations must act now to automate more than IT Services workflows.**

While both DACH enterprises and German upper midmarket organizations have done a lot of work to automate IT workflows, DACH enterprises have made significantly more progress in automating employee and customer experience workflows. German upper midmarket companies need to evaluate workflow automation opportunities outside of IT to avoid employee and customer experience challenges.



**ESM provides a great opportunity for IT and business teams to collaborate.**

The key to successful workflow automation is for both business and IT teams to work together to understand which parts of the business functions can be automated. The goals of what expected outcomes can be achieved must be understood and then delivered. Across DACH enterprises, many large organizations are moving to automate customer and employee workflows and within this region, ESM has a strong growth potential for many years to come.



# INSIGHTS: TOP MARKET TRENDS 2023 TECHNOLOGY



**SaaS growth will continue, driven by security and reliability requirements, but consolidation at the vendor level may occur.**

The rise of Cloud technology in recent years has made it possible to move entire business operations off-site through the use of SaaS. We predict that SaaS will grow around 15% to 20% in 2023, with continuing significant growth through 2026. Despite the existing SaaS myth of the past, SaaS tools offer many benefits such as robust security, scalability, easy update capabilities, accessibility from anywhere, adaptable to support change, improved collaboration and finally flexible payment models. While there have been very few acquisitions across the ESM and ITSM space in 2022, there may be a significant number to come in 2023.



**Advanced capabilities and architectures are a must for competitive advantage.**

The capabilities and architectures to automate back-office workflows will not excite those who want to automate the customer and employee experience on the front-end. Capabilities such as personalization, AI, intelligent chatbots, virtual agents and integration with modern collaboration (e.g., Metaverse) are essential. While data quality has always been a challenge, in 2023, rapid decision making will require AI capabilities. Finally, security and observability capabilities, are of high importance to IT operations and should therefore be on the capability list to improve the reliability and availability of everything to everyone.



**Solutions must include four key capabilities and your ability to measure improvements are essential to prove benefits.**

While significant progress has been made in automating IT workflows, the next steps in customer and employee workflow automation must be driven by the following critical success factors before selecting your workflow automation solution: (1) It must integrate with your existing systems and infrastructure without a heroic act, (2) It must connect workflows and processes across functional departments, (3) It must also allow for changes to the workflow and (4) It must scale up to support the growth within the function or business. In addition, you need to measure the benefits across all to show improvements.



# INSIGHTS: GERMAN UPPER MIDMARKET TRENDS 2023



**Workflow automation is attractive to all businesses, regardless of size.**

IT Services and employee services are now essential to conducting business, supporting customers, or serving patients or citizens for all organizations. Whether small or large, the ability to automate or re-engineer existing workflows is very attractive. The additional shortage of skilled workers is accelerating the demand for solutions that can help automate mundane tasks so that the existing workforce can focus on the essential work.



**Workflow automation is no longer just an IT issue.**

Our survey data shows that IT Services are the more mature, but upper midmarket companies in Germany have initiated and will continue to initiate projects to automate other business workflows, such as within HR, finance or legal. A related trend is that executives are looking for solutions that can cover both IT and other business workflows.



**Open Source ITSM solutions are still popular in German upper midmarket organizations.**

Open Source ITSM solutions\* are still attractive to upper midmarket organizations because these tools are license free and many of them can be integrated with already existing IT operations management or other existing tools. The hidden manpower costs are less evident in the midmarket. These Open Source ITSM and service desk solutions typically focus on incident, problem and self-service management.

\* Open Source ITSM tools include:

- (1) OTRS, RT, OSTicket, FreeHelpDesk and openITCOCKPIT for Incident und Problem Management
- (2) I-Doit, OCS Inventory NG, OpenQRM, RANCID, Factor, Opsi and Puppet for Change, Configuration and Asset Management
- (3) R-Project, SE Toolit, XE Toolkit, Orca und ]Project-Open[ for Capacity Management



# VENDOR SELECTION MATRIX™

## IT AND ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

### THE TOP VENDORS FOR GERMAN UPPER MIDMARKET COMPANIES 2023



These are the Top 15 vendors as selected by 750 users from buyer companies based upon product, company and service quality.

#### VENDOR NAME SOLUTION

BMC SOFTWARE	BMC Helix Service Management
DESKCENTER	Deskcenter Management Suite
FRESHWORKS	Freshservice and Freshservice for Business Teams
IET SOLUTIONS	IET IT Service Management Platform
KYBERNA	ky2help Service Management Software
MANAGEENGINE	ManageEngine ServiceDesk Plus
MATRIX42	Matrix42 Enterprise Service Management
MICROSOFT	System Center Service Manager, Power Automate, Dynamics 365
OMNINET	OMNITRACKER
REALTECH	Realtech Service Management Platform
SERVICEAIDE	ChangeGear, ISM, Point Of Business Platform
SERVICENOW	ServiceNow IT Service Management with optional Employee, Customer and Creator Workflows
SERVICWARE	Serviceware Enterprise Service Management Platform
SOFTEXPERT	SoftExpert Enterprise Service Management
SOLARWINDS	SolarWinds Service Desk

This list is alphabetical and includes all relevant Enterprise Service Management solution vendors for the German upper midmarket named by the survey respondents.

For this report we interviewed 750 enterprise IT and business managers with budget responsibility in the German upper midmarket. 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 15, or had less than 15 ratings:

- EASYVISTA
- IFS
- IVANTI
- MICRO FOCUS/OPENTEXT
- USU
- VISION HELPDESK
- ZENDESK

**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.



# VENDOR SELECTION MATRIX™

## IT AND ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

### THE TOP VENDORS FOR GERMAN UPPER MIDMARKET COMPANIES 2023



## Vendor Quick Facts

VENDOR NAME	MARKET PRESENCE	GROWTH RATE	CUSTOMER TRACTION	GOOD TO KNOW
BMC SOFTWARE	Medium	Medium	Good	Delivers intelligent, interconnected service experiences across employees, customers, developers, and technology partners.
DESKCENTER	Small	Medium	Good	Offers solutions to automate IT Services.
FRESHWORKS	Medium	High	Strong	Helps organizations modernize IT and unify service delivery across business teams.
IET SOLUTIONS	Small	Low	Medium	Offers out-of-the-box ITSM which are configurable and scaleable.
KYBERNA	Small	High	Good	A complete solution to automate any IT or business workflow.
MANAGEENGINE	Medium	Medium	Medium	Simplifies IT Service Management for enterprises and MSPs.
MATRIX42	Medium	High	Strong	Delivers solid and secure digital service experiences.
MICROSOFT	Medium	Medium	Good	Continues to bundle Service Management with its solutions.
OMNINET	Small	Medium	Good	A low-code solution enabling the automation of IT and business workflows.
REALTECH	Small	Low	Good	An easy-to-use automation solution to optimize any workflow.
SERVICEAIDE	Small	Low	Good	A robust Service Management solution offering intelligence and automation at a low-cost.
SERVICENOW	Very Big	Very High	Good	Continues to accelerate enterprise-wide digital transformation leveraging its low code platform.
SERVICWARE	Medium	Medium	Strong	Accelerates, optimizes and automates enterprise's journey towards the digital economy.
SOFTEXPERT	Small	Medium	Good	Automates corporate and IT Services in an integrated way.
SOLARWINDS	Medium	High	Good	Fast-tracks the collaboration between service development and service delivery.

MARKET PRESENCE	GROWTH RATE	CUSTOMER TRACTION
Very Big	Very High	Strong
Big	High	Good
Medium	Medium	Medium
Small	Low	Low

#### NOTES:

- Market Presence combines the market share and perceived Mindshare (or Share of Mind).
- Growth Rate is the anticipated growth rate for this year where Medium is the average growth for this market.
- Customer Traction combines the vendor's customer retention rate and the Research In Action Recommendation Index (RI). The RI is collected and calculated by asking the survey participants: "Would you recommend this vendor in this market to your peers - Yes or No?".



# VENDOR SELECTION MATRIX™

## EVALUATION CRITERIA

STRATEGY 		
 <b>Vision And Go-To-Market</b>	<b>30%</b>	<ul style="list-style-type: none"> <li>› Does the company have a coherent vision in line with the most probable future market scenarios?</li> <li>› Does the go-to-market and sales strategy fit the target market and customers?</li> </ul>
 <b>Innovation And Differentiation</b>	<b>30%</b>	<ul style="list-style-type: none"> <li>› How innovative is the company in this market?</li> <li>› Does the solution have a unique selling proposition and clear market differentiators?</li> </ul>
 <b>Viability And Execution Capabilities</b>	<b>15%</b>	<ul style="list-style-type: none"> <li>› How likely is the long-term survival of the company in this market?</li> <li>› Does the company have the necessary resources to execute the strategy?</li> </ul>
 <b>Recommendation Index</b>	<b>25%</b>	<ul style="list-style-type: none"> <li>› Would customers recommend this vendor in this market to their peers?</li> </ul>

EXECUTION 		
 <b>Breadth And Depth Of Solution Offering</b>	<b>30%</b>	<ul style="list-style-type: none"> <li>› Does the solution cover all necessary capabilities expected by customers?</li> </ul>
 <b>Market Share And Growth</b>	<b>15%</b>	<ul style="list-style-type: none"> <li>› How big is the company's market share and is it growing above the market rate?</li> </ul>
 <b>Customer Satisfaction</b>	<b>25%</b>	<ul style="list-style-type: none"> <li>› How satisfied are customers with the solution and the vendor today?</li> </ul>
 <b>Price Versus Value Ratio</b>	<b>30%</b>	<ul style="list-style-type: none"> <li>› How do customers rate the relationship between the price and perceived value of the solution?</li> </ul>

### 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.
- The Research In Action Recommendation Index (RI) is collected and calculated by asking the survey participants: "Would you recommend this vendor in this market to your peers - Yes or No?".



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#### Challenger

IET SOLUTIONS  
MANAGEENGINE

**Note:** Vendors are listed alphabetically.



RESEARCH IN ACTION  
vendor selection matrix®

# VENDOR SELECTION MATRIX™

## IT & ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

BMC Software is a market leader in the German upper midmarket for IT & ESM Solutions and delivers intelligent, interconnected service experience across employee, customers, developers, and technology partners.



### GENERAL

BMC Helix offers a robust multi-Cloud and hybrid Cloud service management solution based on an open platform. BMC Helix helps organizations improve their productivity, control costs, increase visibility, and operate in secure environments. The BMC Helix solution portfolio is focused on elevating service experiences across all users through automation, intelligence, and personalization. BMC Helix Service Management empowers enterprises to digitize and to adopt to ongoing changes and market trends. As a software company with 40 years of experience in Service Management, BMC has a broad portfolio of solutions and innovations including AI, no-code visual workflow modelling, and more to help customers modernize. It has continuously shaped and enabled the Enterprise Service Management and IT service management agenda across global enterprises. Today, the company has more than 10,000 customers across the globe. Its total revenue in 2022 was around \$ 2.1 billion.

### BOTTOM LINE

The BMC Helix solution portfolio and its partner ecosystem are an excellent choice for organizations interested in breaking down the silos across IT, lines of business, employees, and customers. BMC Helix Service Management (SM) integrates intelligent automation, an AI/ML process engine, AISM and RPA for predictive incident management and auto-correlation of events, remediation and additional insights and actions. BMC Helix SM can be leveraged to deliver services and workflow automation outside of IT while enabling enterprises to easily integrate their applications and data of choice. BMC has the broadest portfolio coverage (breadth and depth of the solution offering) of all vendors in the market.



# VENDOR SELECTION MATRIX™

## IT & ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

Freshworks is a market leader for global Enterprise Service Management Solutions and helps organizations modernize IT and unify service delivery across business teams.



### GENERAL

Founded in 2010, Freshworks takes a fresh approach to business software by building and delivering software that's quick to implement, intuitive, and cost effective. Since its inception, Freshworks has experienced remarkable growth in both IT and Enterprise Service Management. In Q4 of 2022, Freshservice launched Freshservice for Business Teams to unify IT and business teams with a single service management solution for fast, easy and seamless employee services. Headquartered in San Mateo, CA, Freshworks operates from 13 global offices and has 5,000+ employees serving global enterprises of all sizes. Its solutions have successfully transformed small, medium and large enterprises in their digital transformation journey, and helped organizations realize value faster.

### BOTTOM LINE

Powered with intelligent automation, Freshworks makes it easy to improve employee productivity, maximize business availability, and realize value faster. The software is extremely intuitive, easy to use, quick to onboard and affordable for organizations fitting any budget. It delivers all key functionalities and capabilities essential for improving employee and customer experiences. The company will continue to innovate and expand beyond its already broad solution set with new capabilities and features.



# VENDOR SELECTION MATRIX™

## IT & ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

MATRIX42 is a market leader in the German upper midmarket for IT & ESM Solutions and delivers solid and secure digital service experiences.



### GENERAL

Matrix42 headquartered in Frankfurt, Germany has been in the IT automation market since 1992. Its vision of the digital workplace has inspired its employees and customers over many years. Over 5,000 global midmarket and enterprise customers are leveraging one or more of its digital workspace solutions which includes Enterprise Service Management, Secure Unified Endpoint Management and its Digital Workspace Platform. The Matrix42 Digital Workspace Platform is a low-code platform, which enables the design and automation of any service management process and is foundational to all its products.

### BOTTOM LINE

Matrix42 keeps gaining recognition as a major player within Enterprise Service Management with focus on supporting and accelerating the future of work, providing vision and ambitions for enterprises across many verticals. Matrix42 Digital Workspace Platform is the basis of all Matrix42 products and thus an essential component of Matrix42 Enterprise Service Management. Its ESM solution is an excellent choice as it offers a powerful combination of functions for configuration, automation, and integration of enterprise services with built-in security.



# VENDOR SELECTION MATRIX™

## IT & ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

ServiceNow is a market leader in the German upper midmarket for IT & ESM Solutions and continues to accelerate enterprise-wide digital transformation leveraging its low code platform.



### GENERAL

Since its inception in 2004, ServiceNow has grown to become a platform for digital business, enabling its customers to automate almost any workflow. With a focus on enterprise and commercial accounts, the company serves over 7,700 customers, including more than 80% of the Fortune 500. Over 20,500 employees and 1,500 partners worldwide helped the company grow year-over-year revenue by 28.5%, earning \$ 6.9 billion in 2022. The company also received an award as a great place to work and is part of the Fortune World's most admired companies in 2022. However, there is no dedicated focus on German upper midmarket companies.

### BOTTOM LINE

The ServiceNow platform and its extensions, add-ons and broad capabilities are an excellent choice for large enterprise organizations automating, reengineering or optimizing existing or developing new workflows. While its roots are in IT service management, the platform and its modules can be leveraged to connect different processes, events, data, or resources for holistic digital value streams. This provides different functions (e.g., IT, HR, Workplace, Legal, Procurement, Customer, Field Service, and more) to collaborate and deliver a connected experience in context of the relative ecosystem and needs. ServiceNow has the broadest portfolio coverage (breadth and depth of the solution offering) of all vendors in the market.



# VENDOR SELECTION MATRIX™

## IT & ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

Serviceware is a market leader in the German upper midmarket for IT & ESM Solutions and accelerates, optimizes and automates enterprise's journey towards the digital economy.



### GENERAL

Serviceware has been a powerful player in the Enterprise Service Management and IT Service Management market and today has more than 1,200 platform clients. Its installed base includes customers worldwide from various business sectors, including 17 DAX companies (out of 40) and 5 of the 7 largest German companies as well as many upper midmarket customers. The headquarters of Serviceware are in Idstein, Germany. The company today has more than 500 employees spread across 14 locations, and last year's Serviceware revenue was Euro 81.3 million.

### BOTTOM LINE

Serviceware's continued double-digit growth and investment in innovation across its the solution portfolio is a testament to its success today and promises continued success in the future. Serviceware's two-pronged approach to increasing customer value is defined by a successful M&A strategy and an innovative approach, while addressing new solution and technology segments, such as AI, Solution Bots and Technology Business Management. The company is committed to driving the platform's capabilities towards its vision of making its customers successful in the service economy. Its solution is a viable alternative to that of its mega-vendor competitors.



# VENDOR SELECTION MATRIX™

## IT & ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

SoftExpert is a market leader in the German upper midmarket for IT & ESM Solutions and automates corporate and IT Services in an integrated way.



### GENERAL

SoftExpert is a software and service company offering solutions for business compliance, innovation and digital transformation. The company was founded in 1995 and has its headquarters in Brazil and currently has over 400 employees serving around 2,000 customers. The solutions are offered to a variety of organizations via a set of multi-language modules that are all integrated to automate processes and optimize different business areas of organizations. In the last few years, the company has expanded its market into Europe and has achieved significant growth in the German upper midmarket.

### BOTTOM LINE

The SoftExpert ESM component includes capabilities for both IT and business service workflow automation. SoftExpert ESM is part of the company's SoftExpert Excellence Suite integrating many different management capabilities into one suite to improve visibility, consistency and productivity within and across different business functions. SoftExpert ESM has achieved an excellent score for the breadth and depth of its solution offering.



# VENDOR SELECTION MATRIX™

## IT & ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

SolarWinds is a market leader in the German upper midmarket for IT & ESM Solutions and fast-tracks the collaboration between service development and service delivery.



### GENERAL

SolarWinds has been in IT automation software for more than 20 years. Its global headquarters is in Austin, Texas with additional 20 offices around the world. Today the company has more than 2,300 employees globally. Its portfolio of solutions includes a variety of IT automation software to support IT professionals accelerating service development and service delivery. A variety of acquisitions have accelerated its ability to extend its solution portfolio.

### BOTTOM LINE

SolarWinds has been able to refocus its vision and strategy towards both service development and service delivery and has complimented its SolarWinds platform with service management to automate IT workflows between the different roles in IT. The company continues to enhance its solutions to accelerate the cooperation and collaboration between the different roles within IT to enable business functions towards their goals.



# THE RESEARCH IN ACTION GMBH VENDOR SELECTION MATRIX™ METHODOLOGY

## 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. Research In Action GmbH disclaims all warranties, expressed or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose. All trademarks are recognized as the property of the respective companies.

## About:

Research In Action GmbH is a leading independent information and communications technology research and consulting company. The company provides both forward-looking as well as practical advice to enterprise as well as vendor clients.



# APPENDIX: IT AUTOMATION MARKETEXTURE 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 a IT enterprise.
- **AI Powered Chatbot Platforms** which are used to build applications that answer questions, provide advice and/or recommendations using natural language processing and other dialog related technologies.
- **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.
- **Continuous Hybrid Management (CHM)** platforms or solutions that empower, automate and continuously manage the ongoing demands of all digital functions within an enterprise no matter if they are within IT or business teams.
- **Connected Service Management (CSM)** platforms or solutions are part of the management domain which manage the entire spectrum of customer, employee and digital experiences.
- **Digital Process Management (DPM)** solutions automate and manage the digital processes across different business functions.
- **Enterprise Service Management (ESM)** is a category of business management software - typically a suite of integrated applications that a service organization uses to capture, manage, save and analyze data critical to their service business performance. It automates service offerings across internal functional areas such as (1) Human resources, (2) Vendor management, (3) Technical services, (4) Field services, (5) Financial management and (6) Shared services organizations.
- **Hybrid Cloud Management (HCM)** solutions manage the Cloud infrastructures and applications from an end-to-end perspective.



# APPENDIX: IT AUTOMATION MARKETEXTURE 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 accurate and cost-effective management of IT assets and resources with the aim to plan, control, recover (or overall manage) costs which are occurring while providing IT and Enterprise Services to the organization.
- **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.
- **Technology Cost Management (TCM) or Technology Business Management (TBM)** software enables the planning, management and visibility of the supporting and required business and IT technology resources from a cost and capacity perspective by visualizing, planning, prioritizing and optimizing the usage and demands of technology resources (people, processes and technologies) for the enterprise.
- **Value Stream Management (VSM)** 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.



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