

Magic Quadrant for Client Management Tools

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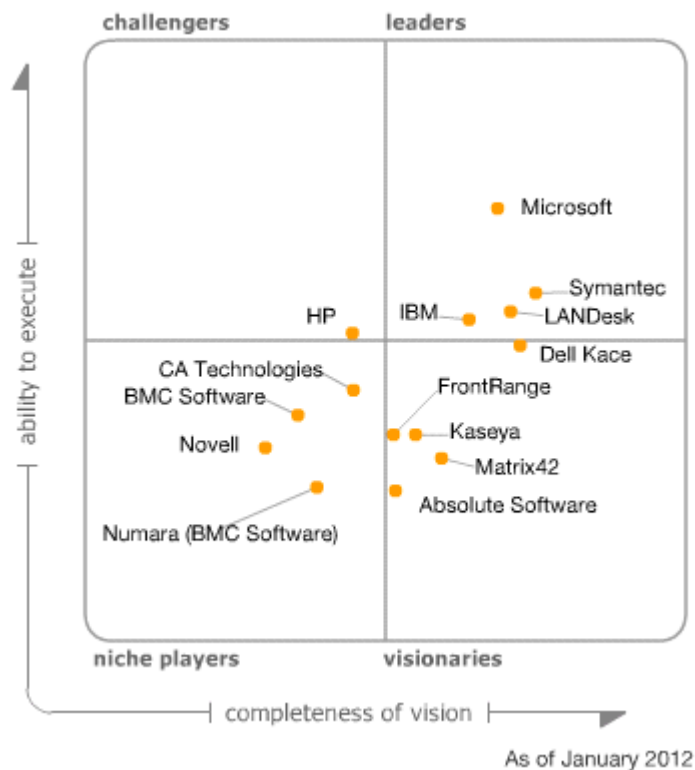
We have renamed the Magic Quadrant for PC Configuration Life Cycle Management due to the emergence of mobile device and Mac management needs. Smartphones, tablets, Macs, virtual desktops and virtual applications all represent emerging targets of management.

Market Definition/Description

Client management tools manage configurations and support system administration tasks for client devices. They are used by desktop support organizations to automate system administration and support functions that would otherwise be done manually. Windows PCs are the primary target of management, but organizations are looking to use these products to manage Macs and mobile devices as well.

Magic Quadrant

Figure 1. Magic Quadrant for Client Management Tools



Source: Gartner (January 2012)

Vendor Strengths and Cautions

Absolute Software

Absolute Software acquired LANrev in December 2009, and rebranded it as Absolute Manage. Absolute Manage's biggest strength is its Mac management capability. It has better Mac management capabilities than any product that provides both Windows and Mac management. Absolute Software also has mobile device management (MDM) for iOS and Android. Absolute's Apple management capabilities have made it popular in specific circles, such as the education and media industries. Absolute Manage does not have the full depth of Windows management functionality, compared with more established products in the market in areas such as software distribution, inventory, patch management and OS deployment. Absolute Software does not have a broad geographic presence, deriving most of its revenue from North America and the rest from Europe. Overall product revenue is low, compared with that of most competitive products.

Strengths

- Absolute Manage has a strong go-to-market strategy with Absolute Software's Computrace product. Computrace provides endpoint tracking capabilities at the firmware level, while Absolute Software manages the device at the OS and application level.
- Customers give the product high praise for code stability, ease of deployment and usability.
- Absolute Software received the highest support quality scores of the vendors in this Magic Quadrant.

Cautions

- Absolute was late to the market with Windows OS deployment capabilities, recently adding features such as .WIM image support and multicast. Uptake among customers of Windows OS deployment has been low so far.
- Absolute Manage does not support any application virtualization products, such as Microsoft App-V or VMware ThinApp, and does not currently support its agent in hosted virtual desktop (HVD) environments such as Citrix XenDesktop or VMware View.
- Absolute also does not have a broader IT service management product offering, with which client management often aligns; organizations that use Absolute Manage must buy separate products for IT service desk and IT asset management.

BMC Software

BMC BladeLogic Client Automation (BBCA) is a scalable client management product with particular strengths in software distribution. BMC's focus on BBCA has been waning over the years, which led BMC to offload BBCA product development responsibilities to its competitor Matrix42 in 2011. The product is still sold and supported by BMC, but R&D is now provided by Matrix42. Many customers are still satisfied with the product. These customers tend to be those that acquired a high degree of product expertise to optimize the product for their environments. Organizations that are heavily invested in BBCA and happy with the way it works should stay the course; there are enough of these customers to generate the necessary revenue to fund continued development and support. Gartner doesn't believe that BBCA will grow substantially, given its lack of strategic focus to BMC.

Strengths

- For software distribution, BBCA uses a policy-based approach to delivering and removing software. It is adept at configuring complex application bundles, and has application repair capabilities to fix failed distributions.
- Version 8 of BBCA has strong integration with Remedy and Atrium CMDB. BMC added new fields to the inventory module to enable easier integration with Atrium.
- BBCA is flexible and domain-independent, and can work across standard Internet protocols more easily than many competitive products.

Cautions

- BBCA does not have an MDM offering, but is evaluating its strategy in this area.
- BBCA lacks patch management and remote control for the Mac platform.
- BBCA is not officially supported in VMware View and Citrix XenDesktop environments, though some customers use BBCA to a limited extent to manage these virtual desktops.

CA Technologies

CA's Client Automation is differentiated from other products mainly by the unified architecture and consolidated reporting it shares with CA IT Asset Manager and Service Desk Manager. Gartner sees Client Automation primarily in accounts where the customer uses a large number of other CA products. Client Automation did not get significant traction with Gartner clients in 2011; in most cases, we saw the product only in scenarios where the customer was considering upgrading from an older version, rather than buying Client Automation for the first time. Client Automation received high scores for virtual desktop management based on the capability to automatically deploy or activate applications, including .MSI, to nonpersistent desktops — a capability organizations use to reduce the number of virtual desktop images. It received medium to low scores on the other visionary criteria, such as mobile device management and alternative delivery models. We have seen CA offer aggressive pricing and creative licensing to acquire new business.

Strengths

- Client Automation is one of the few products in the market that adds value to HVD environments. Specifically, version 12.5 SP1 can maintain application assignments for dynamically assembled desktops for VMware View-linked clones, and similar capability is in development for XenDesktop.
- Client Automation has superior PC migration capabilities, which is relevant because of the large numbers of Windows 7 migrations that will continue to take place during the next two years.

Cautions

- Client Automation does not have mobile device management capabilities for iOS and Android, and does not have this capability slated for the next release in mid-2012. CA is evaluating its strategy to address this space.
- We do not see CA acquiring new customers at the same rate of success as many other competitive vendors in this market.

Dell Kace

Dell acquired Kace in February 2010. Kace was the first vendor in the client management market to have successful appliance-based products, and is still the only appliance-based vendor that has seen significant market adoption. Kace has two appliances targeted to enterprises — an OS deployment appliance and a separate appliance for life cycle management — these represent the K

Series. It also released a series of mini appliances, called the M series, targeted to organizations with fewer than 100 users. We typically see Dell Kace in organizations with about 200 to 5,000 PCs. The Kace appliances have solid functionality that meets the needs of many midsize organizations, and we believe Dell will continue to keep Kace focused on these market segments. Kace typically is not a good fit for organizations that want to manage tens of thousands of clients centrally, because it doesn't scale well to support large environments. Kace plans to add MDM in the first half of 2012. It will be a feature of the K1000, rather than a separately licensed product.

Strengths

- Kace appliances are easy to deploy, maintain and upgrade, which is one of the major challenges of client management tools in general.
- The OS deployment appliance has intuitive functionality for image-building and deployment processes.
- Kace business is growing rapidly, which will help ensure funding for continued product investment and innovation.

Cautions

- OS deployment is strong, but some other core functions of the K1000 (e.g., inventory and software distribution) are not as comprehensive as many other competitive products in the client management market.
- Customers have cited reporting as an area that needs improvement, in particular real-time status reporting.
- K Series products are not supported in HVD environments, and they do not support any application virtualization products (though App-V support is in development).

FrontRange

FrontRange Desktop and Server Management (DSM) is an easy-to-use client management product aimed primarily at midsize organizations and those that have limited desktop management skills. DSM functionality is intuitive, allowing IT staff to start using the product quickly. FrontRange is developing an IT service management strategy by selling DSM, Discovery and License Manager (formerly Centennial) and the FrontRange Service Desk as complementary products. Although there is a demand for such combined solutions, FrontRange is still working on integrating these products. Most DSM revenue is generated from European customers; Gartner has yet to see substantial adoption of the product in North America or Asia. FrontRange plans to release a software as a service (SaaS) platform for DSM, which will be one of the few products in the market offering a SaaS platform. FrontRange does not have MDM, but will likely include an OEM product by the end of 2012.

Strengths

- Package building has long been a differentiator for DSM. Many products require third-party products for advanced application packaging; however, DSM provides a proprietary module to help customers build products.
- FrontRange DSM offers 170 canned tasks, which are particularly useful for organizations that lack technical configuration management expertise.
- DSM has strong Citrix XenApp management capabilities; for example, customers can take the same package that was packaged for a PC, and use DSM to configure it for XenApp (e.g., concurrent execution, etc).

Cautions

- FrontRange lacks significant traction in the client management market; DSM has not seen product growth or significant penetration outside its European roots. The majority of product revenue is driven by maintenance, not new license revenue.
- Lacking is a large user community where administrators can network and get peer support.
- FrontRange's Mac support is behind leading products in this area, lacking patch management and remote control.

HP

HP Client Automation (HPCA) is a highly scalable product that has strong capabilities in maintaining "compliance" across large numbers of PCs. It also has advanced bandwidth management features, and often outperforms other products in low-bandwidth situations. These have been the strengths of HPCA for many years. HP hasn't been advancing the HPCA product as quickly as competitive vendors, and HP is losing traction in the market. HP did receive strong scores on virtualization management, based on capabilities to manage dynamically assembled HVDs, as well as a unique integration capability with VMware ThinApp, which enables it to scale significantly, but received low scores for alternative device management, due to sparse Mac capabilities and lack of support for mobile devices.

Strengths

- HPCA's desired-state approach to managing PCs is the product's key differentiator. This approach is useful for organizations that must implement PC changes (e.g., patches) quickly, with high success rates over tens (or hundreds) of thousands of PCs.
- HPCA is one of the few vendor products developing management capabilities for nonpersistent HVDs.
- HPCA is scalable and designed for large organizations, particularly in areas such as HVD management.

Cautions

- HPCA has no MDM capability; customers must use a third-party product.
- Comprehensive software usage, software rationalization and compliance reporting require a separate agent, Discovery and Dependency Mapping Inventory (DDMI), and console (HP Asset Manager).
- HPCA is not a rapidly growing product, and is having difficulty getting traction even within its own PC hardware group.

IBM

IBM acquired BigFix in July 2010 and renamed the product to IBM Tivoli Endpoint Manager (TEM). TEM's primary differentiator is that the tool's intelligence is on the endpoint, rather than the server. The agent can discover a deviation from policy and execute remediation, rather than wait for a system scan and subsequent report on the server side to tell administrators they need to take action. The agent also looks for every component (e.g., dynamic link libraries) of a patch or package to ensure that it is installed properly. This enables organizations to enforce policy more quickly and reliably than can be done with competitive products. IBM will likely keep TEM focused on large enterprises and meeting the requirements of those organizations, rather than midsize customers. TEM received strong marks on integrated security and configuration management capability, as well as Mac management; however, it is trailing some competitors that offer more capability for virtual desktop patching and software deployment.

Strengths

- TEM is scalable, enabling organizations to manage large numbers of endpoints (tens/hundreds of thousands) with relatively few servers, compared with competitive products.
- The architecture of TEM products (based on the BigFix platform and Fixlet technology) enable organizations to manage the operational and security state of endpoints with the same infrastructure — strong at patching and maintaining security compliance.
- Although not at full feature parity with its Windows functionality, TEM's Mac management capabilities are strong, compared with other client management products.

Cautions

- It is difficult to integrate TEM with adjacent systems, such as service desk tools and IT asset management repositories.
- Although the Fixlet authoring language differentiates TEM from competitive products, this is a proprietary language/skill with a learning curve.
- IBM has not completed the integration of BigFix with Tivoli Provisioning Manager for OS deployment; therefore, customers have to use a mix of separate products for full life cycle

management. IBM plans to fully integrate Tivoli Provisioning Manager for OS Deployment in 2012.

Kaseya

Kaseya is a relatively new player in the client management space. The company has existed since 2000, but has focused mainly on selling its product through managed service providers, rather than directly to IT organizations. The company has shifted its focus in the last two years, and is now used by IT organizations to manage their internal environments. Kaseya's main differentiation from other client management vendors is in its SaaS platform. Several client management features, including patch management and inventory, can be delivered as cloud-based services, rather than as on-premises functions. While Kaseya does have some large customers, most of its customers are small and midsize businesses. The product is designed to be simple to use, but doesn't have the full range of functional sophistication as other products in the market.

Strengths

- The SaaS platform is for inventory, patch management and other adjacent IT management functions, such as service desk and anti-malware.
- Kaseya has one of the few products in the market that has an MDM module that currently supports Apple iOS and Android platforms.
- Kaseya's products offer a wide range of client management functionality, including capabilities that many other client management products don't offer, such as PC backup and system performance monitoring.

Cautions

- Mac management capabilities are immature, currently lacking patch management and software distribution.
- Kaseya does not support any application virtualization products, such as Microsoft App-V or VMware ThinApp.
- References consistently cite reporting as an area that needs improvement in the product.

LANDesk

LANDesk has one of the most complete products in terms of overall functionality. LANDesk also grew, largely through organic product development; the modules within LANDesk Management Suite (LDMS) share a common look and feel that allow organizations to train (and cross-train) IT administrators more easily. In November 2011, LANDesk released a mobile device management product, LANDesk Mobility Manager, which operates from the LDMS console. LDMS also improved its Mac management capabilities in the most recent release — in particular, the OSX patching feature is much improved and stronger than most competitive products. LANDesk benefited this year from an increased weight on managing non-Windows clients; however, LANDesk was held back, because it lacked an appliance or SaaS offering (outside those delivered by LANDesk

partners). LANDesk signed an agreement with the HP Personal Systems Group to provide manageability capabilities for HP hardware and should be a significant channel for LANDesk.

Strengths

- LDMS has a feature called targeted multicast, peer download that enables administrators to distribute applications using a peer-to-peer model at subnets. LANDesk customers have fewer remote package servers than customers using competitive products.
- LANDesk Security Suite and Service Desk are well-integrated with LDMS.
- LANDesk has a solid geographic balance among its customer base; Asia represents a significant source of revenue, in addition to North America and Japan.

Cautions

- OS deployment has improved with v.9; however, customers often use custom tools to augment its functionality.
- The LDMS agent is supported in a persistent HVD, but it does not have nonpersistent desktop support at this time.
- A number of customers have cited product quality issues with v.9, ranging from areas including OS deployment, patch management and reporting. These have been mostly addressed with minor release and service pack updates, but LANDesk must demonstrate continued code quality.

Matrix42

Matrix42's Empirum is a full life cycle management product sold mostly to midsize organizations. Most of Matrix42's business (representing almost all its new customers) comes from Europe. Empirum is relatively easy to install and use, and has overall strong functionality for OS deployment and software distribution. Matrix42 has developed management capabilities for Citrix XenDesktop, which ties the various XenDesktop consoles together, and enables organizations to manage physical and virtual environments with a single product. It is the only vendor in the client management market with this capability. Matrix42 has been broadening its capabilities for the past two years, acquiring service desk and asset management products, and partnering with Airwatch to provide MDM capabilities. Matrix42 has integrated these products at the process and data level, but needs to further integrate the products at a console level and demonstrate market traction beyond its historical stronghold in Central Europe.

Strengths

- Empirum's management functionality for Citrix XenDesktop is a visionary capability addressing a major challenge cited by references: managing physical and virtual desktop environments together.

- Empirum's Rollout Coordination feature helps administrators monitor software distribution jobs.
- Matrix42 offers a full life cycle management product, including backup and recovery, PC disposal and a self-service catalog, which many products do not offer.

Cautions

- Matrix42 has not received significant traction with Gartner clients making product decisions.
- Matrix42's lack of traction in the U.S. will present challenges for U.S. customers — namely, a lack of English-speaking user communities and challenges finding system administrators with Empirum experience.
- Mac Management capabilities are incomplete, currently lacking patch management.

Microsoft

Microsoft System Center Configuration Manager (ConfigManager) is the dominant product in the market; it holds more than half of the market's installed base. Microsoft continues to make ConfigManager financially attractive by including the client management licenses (MLs) in the Microsoft Core CAL and Enterprise CAL Suites, bundling ConfigManager with related products such as ForeFront Endpoint Protection and Service Manager. Microsoft will release ConfigManager 2012 in the first half of 2012. ConfigManager has never been a best-of-breed product, but the 2012 release narrows the gap between it and competitive products.

First, the complexity of the ConfigManager infrastructure is reduced in the 2012 version through the introduction of role-based access controls and other capabilities that reduce the amount of traffic required to travel the network. The new version also requires less scripting to execute common tasks. Finally, ConfigManager moved to a more context-aware model. The tool now delivers applications to users, and will present different applications and use different delivery models based on user context (e.g., if they are using their primary laptop or using a terminal server session). This model requires significant changes to IT processes around software licensing and software delivery, so uptake among early adopters of this feature has been low. Microsoft also released Intune, a separate SaaS-based client management product, but Gartner has seen little uptake of the product at this point. Intune will be appropriate for small to midsize organizations that have basic requirements, but organizations that require full life cycle management and customization should continue to use ConfigManager.

Strengths

- ConfigManager 's integration with App-V is tight. The App-V client can pull App-V applications from ConfigManager distribution points on an on-demand basis.
- Microsoft has developed tight integration with products in important companion areas — for example, System Center Service Manager and Forefront Endpoint Protection.

- Because of Microsoft's large installed base, there is much more knowledge of ConfigManager in the industry than of competitive products; it's easier to find consultants, contractors, IT personnel and active user communities for ConfigManager than for other products.

Cautions

- While ConfigManager 2012 will provide lightweight mobile device management through Exchange ActiveSync, many organizations will opt for third-party MDM products, or will select alternative client management vendors that offer more comprehensive capabilities.
- ConfigManager does not support Mac OSX or Linux desktop.
- While the product has been simplified, ConfigManager is still complex; it requires deep expertise to implement and use successfully.

Novell

We continue to mainly see clients considering ZENworks Configuration Management (ZCM) in upgrade situations where longtime Novell customers consider upgrading to newer versions of ZCM. We have not seen Novell acquire many new customers in recent years, and product revenue has declined over the last several years. Gartner believes Novell's sales and marketing focus has changed since the Attachmate acquisition. We believe that Novell is now focused mainly on retaining and growing current accounts. ZENworks is a good product, and organizations that are experienced and satisfied with it should see no compelling reason to switch. ZENworks is distinguished primarily by its ability to differentiate between device and user, managing both configurations distinctly. ZENworks 11 also brings together ZCM, ZENworks Asset Management, ZENworks Patch Management, ZENworks Linux Management and ZENworks Endpoint Security Management (ZESM) through a common console.

Strengths

- The primary management targets for ZCM are users, not machines. This positions ZENworks well to manage portable user work spaces, rather than strictly user machines. Because ZCM is hooked into the user's profile, it can present myriad application types (local, virtual and Web applications) to users — these various types of applications can be presented to the user as items in the start menu, on the desktop or as quick-launch items.
- ZCM has comprehensive software distribution capabilities; complex software distribution jobs can be managed more easily in ZCM than it can in many competitive products that may require more scripting or manual effort.
- ZENworks is one of the few products in the market that combines strong Linux and Windows management.

Cautions

- Novell does not have a strong brand in this market, and we continue to see few organizations considering ZENworks outside legacy Novell customers considering upgrading from an old version of ZENworks to ZCM.
- More than 85% of ZENworks' revenue is from maintenance; less than 15% comes from new licenses.
- ZCM does not yet have MDM capabilities or strong Mac support; Novell intends to address both these areas in the first half of 2012.

Numara (BMC Software)

Numara acquired France-based client management vendor Criston Software in 2009, and included the client management tools into the FootPrints family of products. Since that time, FootPrints client management tools have seen some traction since Numara started positioning them with current and prospective service desk customers and developing console, data and process-level integration between client management and service desk products. The added visibility generated by Numara selling client management to existing service desk customers was the impetus to Numara's inclusion in this year's Magic Quadrant. FootPrints client management has most core life cycle management features that more recognized vendors possess, as Criston had been in the market for many years. However, revenue is still low, compared with other products in Numara's portfolio, as well as those of competitive vendors in the client management market. FootPrints client management is not very well-known globally, compared with many longstanding players in the market, which means resources (e.g., IT labor, consultants, etc.) experienced with FootPrints client management will be harder to find.

BMC Software announced the acquisition of Numara shortly before publication of this Magic Quadrant. BMC has not announced plans to change the direction of FootPrints client management tools, but organizations should request a detailed product road map before moving forward with a purchase of this product.

Strengths

- FootPrints client management has strong vulnerability assessment and security configuration management capabilities, and is a good candidate for organizations looking to maintain compliance with security configuration best practices.
- Numara gets positive feedback from customers about service and support quality.
- FootPrints client management has a simple user interface, making the product accessible to IT staff that lack substantial desktop administration expertise.

Cautions

- FootPrints lacks comprehensive Mac management capabilities (e.g., patching and OS deployment).

- It also lacks some enterprise-class features for software distribution and OS deployment.
- FootPrints client management has low market awareness, as measured by client inquiry and Gartner.com searches.

Symantec

Client Management Suite (CMS) is one of the most complete and comprehensive client management products in the market. CMS has deep functionality across most of its features: inventory, software distribution, OS deployment, software usage and application virtualization. This depth of functionality comes at the cost of complexity, resulting in CMS customers (who get full use of the product) investing heavily in training and consulting to become proficient in using the product. Organizations that make these investments generally report good results, however, Symantec remained one of the most frequently considered vendors in 2011. It scored well on the Visionaries scale because it is investing in product capabilities that will help organizations manage an increasingly diverse set of applications and devices. Additionally, its proprietary application virtualization solution (called Workspace Virtualization) earned Symantec fairly high scores as well. The area in which Symantec did not score well involved alternative delivery models, where Symantec has no appliance or SaaS offering other than an appliance provided by a third party.

Strengths

- The software catalog, new to v.7, enables organizations to more easily manage rules that apply to software, such as blacklisting, usage monitoring and license management.
- CMS has strong software metering functionality; 80% of Symantec's reference customers use the software metering functionality in CMS, while approximately 50% of the overall Magic Quadrant reference population uses software metering.
- Symantec has a large installed base of customers, with an active community of user groups and online forums.

Cautions

- CMS has had a number of stability issues with v.7. While many stability issues have been addressed with v.7.1, Symantec still must demonstrate that it can consistently deliver solid, reliable code.
- Customers are voicing concerns about Symantec's commitment to the Altiris product, as evidenced by scalability and stability issues.
- CMS has a high server footprint; we do not see Symantec customers using peer-to-peer models for distributing applications packages (as some products provide).

Vendors Added or Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor appearing in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. This may be a reflection of a change in the market and, therefore, changed evaluation criteria, or a change of focus by a vendor.

Added

This year Absolute Software and Numara Software were added.

Dropped

None was dropped.

Inclusion and Exclusion Criteria

Products must include the following functions for Windows PC systems:

- OS deployment
- Inventory
- Software distribution
- Patch management

Other functionality often included in client management tools include:

- Software usage monitoring
- Remote control
- Security configuration management
- Power management
- Application virtualization or integration with third-party application virtualization products
- Software packaging
- Scripting

Client management product revenue must exceed \$5 million per year.

Product must be of interest to Gartner clients by appearing on their product selection shortlists.

Vendors must provide at least five references for their client management product.

Evaluation Criteria

Ability to Execute

The Ability to Execute (see Table 1) axis measures the vendors' ability to meet the current needs of client management buyers, as well as their ability to succeed in this market by gaining market share and achieving revenue growth:

- **Product/Service:** We specifically evaluated software distribution, inventory, OS deployment, patch management, software usage, remote control, application packaging and power management. We also evaluated scalability and usability, as they relate to importance in meeting buyers' current needs.
- **Overall Viability (Business Unit, Financial, Strategy, Organization):** This criterion evaluates the size of the vendor and its financial performance. We also evaluated the size and growth of the vendor's client management business.
- **Sales Execution/Pricing:** This criterion was most influenced by the frequency of its appearance on buyer shortlists. We also evaluated the degree to which the vendor has a presence in North America, Europe and the Asia/Pacific region (including Japan).
- **Market Responsiveness and Track Record:** We evaluated execution on delivering products consistently and in a timely fashion, the agility in meeting new market demands, and how well the vendor received customer feedback and quickly built it into the product.
- **Marketing Execution:** This is a measure of brand and mind share through client, reference and channel partner feedback. We evaluated the degree to which customers and partners have positive identification with the client management product, and whether the vendor has credibility in this market. We also used search hits on Gartner.com for the vendor and product as a measure of brand recognition and market awareness.
- **Customer Experience:** We assessed the vendor's reputation in the market based on customer feedback regarding their experience working with the vendor, whether they were glad they chose the vendor's product and whether they planned to continue working with the vendor.

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product/Service	High
Overall Viability (Business Unit, Financial, Strategy, Organization)	High
Sales Execution/Pricing	High
Market Responsiveness and Track Record	Standard
Marketing Execution	High
Customer Experience	High
Operations	No Rating

Source: Gartner (January 2012)

Completeness of Vision

The Completeness of Vision (see Table 2) scale provides an aggregate measure of a vendor's likelihood of future success in the client management market. We evaluated vendors' statements about future product direction, the degree to which current capabilities map to future demands and the focus of the vendor on client management requirements:

- **Market Understanding:** This criterion evaluated vendor capabilities against future market requirements. The market requirements map to the market overview discussion above:
 - **Mobile Device Management:** This considers whether the vendor has a strong capability to manage mobile devices, in particular iOS and Android devices.
 - **Mac Management:** This evaluates product capabilities, plans to manage Mac OSX and the ability to provide functionality such as inventory, software distribution, patch management and remote control.
 - **Desktop Virtualization Management:** This evaluates the vendor's ability to manage physical and virtual environments. Particularly important capabilities are application virtualization and HVD support.
 - **Integration With IT Service Desk and Asset Management:** This evaluates whether a vendor has service desk and asset management products, how relevant those products are in those markets and how well the client management product integrates with those products.
 - **Security and Operations Convergence:** This evaluates whether the vendor has relevant endpoint security capabilities, and whether they are integrated with the client management product.

- **Alternative Delivery Models:** This evaluates whether the vendor has alternative ways of delivering client management functionality, either in the form of an appliance or as SaaS.
- **Marketing Strategy:** This evaluates a clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements. Marketing should align with the market understanding trends discussed above.
- **Sales Strategy:** This evaluates the strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base. The criterion evaluates the strength of the offerings that go to market with the vendor's client management tools (e.g., endpoint security, service desk, asset management).
- **Offering (Product) Strategy:** We evaluated usability and scalability as they relate to their importance in meeting future buyer needs. We also evaluated the breadth of vendor client management offerings, as well as the depth of functionality within each module. Usability received the highest weighting, because the market is skewing toward midsize organizations that typically value ease of use over comprehensive functionality and scalability.
- **Business Model:** We considered whether the vendor is funded adequately and staffed to succeed in this market.
- **Innovation:** This category primarily measures the strategic importance of client management to the company or business unit, and whether the vendor has shown a propensity to innovate to establish differentiation.
- **Geographic Strategy:** The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the vendor's home or native geography either directly or through partners, channels and subsidiaries, as appropriate for the geography and market. Client management tools are heavily penetrated in the U.S. and some European markets. This evaluated the vendor's strategy to penetrate emerging markets.

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	High
Marketing Strategy	Standard
Sales Strategy	High
Offering (Product) Strategy	High
Business Model	Standard
Vertical/Industry Strategy	No Rating
Innovation	Standard
Geographic Strategy	Standard

Source: Gartner (January 2012)

Quadrant Descriptions

Leaders

Positioning in the Leaders quadrant is the result of successful Completeness of Vision and Ability to Execute criteria. These vendors have succeeded in all the following areas:

- Attention to future client demands in client management (which is discussed in the Completeness of Vision section)
- Consistently positive client feedback concerning the efficacy of their products
- Continued visibility and success in an increasingly crowded and competitive market (Gartner tracks which vendors clients are considering as a measure of visibility)
- Substantial market share
- Global presence — demonstrates the ability to deliver solutions to customers in North America, Europe and Asia
- Superior track records for market responsiveness and customer service

The vendors in the Leaders quadrant have unique characteristics that position them favorably for future market success.

Challengers

Challengers are defined by keen capability in Ability to Execute criteria; however, when compared with competitors, their products lack complete functionality and have comparatively few visionary features, particularly around non-Windows device management, that are viewed as necessary to shape the future of the market. Their ability to execute will be proved by solid market share and overall strong functionality. These capabilities are bolstered by overall industry-leading fiscal health and broad geographic presence. Basically, Challengers are followers with superior marketing and sales execution.

Visionaries

Visionaries have vision scores that reflect feature-complete products, and they show technology leadership in providing some life cycle management functions users have begun requesting, or will have an impact during the next year or two (as discussed in the Completeness of Vision section). A Visionary will have particular strengths in certain emerging areas (e.g., mobile device management, Mac management, appliances, SaaS or desktop virtualization), but may lack a fully mature life cycle management solution, a global market presence or brand recognition.

Niche Players

Niche Players can be good choices. They may have strengths in particular areas, but don't have the focus to invest in all the requirements we evaluate for Completeness of Vision criteria. Organizations that are looking for products with specific strengths or that want to consolidate vendors and use multiple products from a single supplier may find that Niche Players' products offer sufficient capability and support. Niche Players tend to sell their client management tools into their own installed base, rather than consistently as stand-alone solutions.

Context

The client management market is mature, and there is not a huge difference in the core functionality of most client management products. Buyers are increasingly driven by factors relating to ease of use and lower total cost of ownership (TCO), rather than by comprehensive functionality. Vendors in this market are still largely lacking in some key areas, most significantly mobile device and Mac management, management of virtualized desktops and applications, and alternative product delivery models (e.g., appliance and SaaS).

Organizations should not merely choose from vendors in the Leaders quadrant; they should create a list of criteria that describes the organization's needs, and select from vendors that best meet those requirements. Organizations should use a vendor that is focused on this market and can meet the organization's needs for at least the next five years. Organizations should focus on skills, training, process and proper product implementation, because these factors will influence a product experience more than the specific functional capabilities.

Market Overview

Gartner has changed the name of the longtime PC configuration life cycle management market to the client management tools market to reflect the growing variety of devices IT organizations now support, such as mobile devices (mainly iOS and Android) and Macs. Support for non-Windows devices is now top of mind for IT organizations. Organizations that have entrenched client management tools are more likely to use MDM tools rather than replace the tools they have, but those that are buying client management products for the PC environment are increasingly including MDM and Mac requirements. In many organizations the same group manages mobile devices, Macs and PCs, which drives an inclination to use an integrated product across all platforms.

There are many drivers for the convergence of client and mobile device management covered in "Mobile Device and PC Configuration Life Cycle Management Tools, Market Update." The references for this Magic Quadrant stated that mobile device management was a critical need and the most important area of improvement for their product. Currently, fewer than half of the vendors in this market have MDM capabilities for iOS and Android. Several vendors have plans to include this capability in their portfolios in 2012, but vendors have still been slow to meet the market need, forcing customers to use third-party products.

We're careful not to overstate the magnitude of device heterogeneity on the client management market. PCs still reflect the primary target of management, representing three to five times the TCO of the smartphones and tablets. Software distribution, patch management, OS deployment and inventory are the four primary functions driving product decisions. Other factors that significantly influence purchases are vendor/product reputation, scalability, usability and the strength of adjacent products, such as IT service desk, asset repository, security configuration assessment and endpoint protection.

Alternative product delivery models, for example, appliances and SaaS, continue to attract interest, mostly from organizations that have struggled (or are likely to struggle) with the complexity of traditional tools. Sixty-one percent of the vendor-provided references for this Magic Quadrant stated that they would consider their product an appliance- or a SaaS-based solution, if it existed, and this did not include customers already using an appliance- or a SaaS-based solution. There was not a clear preference of appliance or SaaS, as 31% favored appliances, while 30% preferred SaaS. Client inquiry is also showing a slight increase in demand for SaaS- and appliance-based products. Full life cycle management can be accomplished with appliances, while the SaaS model is necessarily a hybrid of on-premises and off-premises functionality. For example, some functions (e.g., OS deployment) must be executed on-premises, while other functions can execute from the cloud (e.g., inventory, patch, OS deployment and remote control).

Managing virtual desktop environments is an important emerging requirement of client management tools; Magic Quadrant references rated this as a critical functional requirement, second only to MDM. Desktop virtualization takes many forms: application virtualization, persistent and nonpersistent HVDs, and client hypervisors (see "Hype Cycle for Virtualization, 2011"). The logical starting point for client management vendors with desktop virtualization is to support application virtualization products. Application virtualization support in this market is maturing. Some client

management vendors support multiple products, while others have tighter partnerships with specific vendors. Still others have no support for application virtualization products.

The management of HVDs is the next most critical area for client management vendors. The guiding principle for organizations is that virtual and physical desktop environments should be managed together. Client management vendors should, at a minimum, be able to run the tool's agent in a persistent virtual desktop, because a persistent virtual desktop image is principally no different from a physical desktop, and persistent HVDs represent most early HVD implementations. Most products can do this. The next step is for client management vendors to support nonpersistent HVDs by patching master images and provisioning dynamic desktops for users. The benefits of this model are reduced storage, improved manageability and better standardization. Client management vendors need to be able to provision and manage dynamically assembled HVDs to help organizations maintain consistency across their physical and virtual estates. A few vendors have shown early capabilities in this area, but most can't support this type of computing environment. Organizations should look at their own desktop virtualization plans, and ensure that their client management products are aligned with the styles of virtualization they plan to implement.

Recommended Reading

Some documents may not be available as part of your current Gartner subscription.

"Magic Quadrants and MarketScopes: How Gartner Evaluates Vendors Within a Market"

Evaluation Criteria Definition

Ability to Execute

Product/Service: Core goods and services offered by the vendor that compete in/serve the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability (Business Unit, Financial, Strategy, Organization): Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness and Track Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act,

customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word-of-mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

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