The client management tool market is maturing and evolving to adapt to consumerization, desktop virtualization, and an ongoing need to improve efficiency and lower PC total cost of ownership. These tools will continue to broaden their support of client platforms and application delivery models.

Market Definition/Description

End-user computing and support organizations use client management tools to automate system administration and support functions that would otherwise be handled manually. They are configuration management tools that image client systems, track inventory, deploy configuration changes (such as software or patches), enforce configuration standards and assist with troubleshooting. Windows PCs are the primary target of management, but organizations are looking to extend these products to manage Macs, mobile devices and servers as well. Mobile device management (MDM) is still a separate market, but organizations are increasingly looking to use a single vendor and management platform to support their PCs, Macs and mobile devices.
Vendor Strengths and Cautions

Absolute Software

Absolute Software released Absolute Manage in 2010 to complement its flagship product Computrace, the well-known endpoint security product. Absolute Manage’s greatest strength is its breadth of device coverage, supporting Windows PCs, Mac OS X, iOS, Android and Windows Phone. Absolute Manage’s Mac management capabilities, in particular, have made it popular in specific segments, such as the education and media industries. Absolute Software’s customer base for Absolute Manage is relatively low, compared with other vendors, and the product lacks a vibrant customer community of online forums and user groups. Absolute Software recently added a service desk through the acquisition of LiveTime Software, filling a long-standing gap in its product portfolio. Absolute Manage is a good choice for organizations looking for broad client device management at a low price point.
Strengths

- Mac management capabilities are better than any client management product that provides both Windows and Mac management.
- Computrace, in conjunction with Absolute Manage, provides strong agent health and hardware inventory management capabilities.
- Customers give the product high praise for code stability, ease of deployment and usability.

Cautions

- Absolute Manage lacks patch management for non-Microsoft desktop applications on a Windows client.
- The product’s console must be enhanced and modernized to improve accessibility.
- Absolute Manage does not support any application virtualization products, nor is it supported in hosted virtual desktop (HVD) environments.

BMC Software

BMC Software’s client management strategy changed following the acquisition of Numara Software in early 2012. Numara had a client management tool called BMC FootPrints Asset Core. Immediately following the acquisition, it wasn’t clear whether BMC would continue investing in FootPrints Asset Core, given that BMC already had a client management product, BMC BladeLogic Client Automation. Current indications are that FootPrints Asset Core will be BMC’s strategic client management tool going forward. FootPrints Asset Core has a small market presence, but the product’s usability makes it more attractive to the midmarket customers that will represent most new business. Since BMC’s acquisition of Numara, Gartner has seen FootPrints Asset Core in more client buying decisions than in past years, and it has become a key component of BMC’s IT operations toolset for the midmarket.

Strengths

- FootPrints Asset Core 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.
- The product has a simple user interface, making the product accessible to IT staff that lack substantial desktop administration expertise.
- FootPrints Asset Core has tight integration with FootPrints Service Core and BMC Remedyforce Service Desk, the BMC tool for midmarket organizations, at a console, data and process level.
Cautions

- FootPrints Asset Core lacks comprehensive Mac management features, and is behind the competition in this area.
- While improving, the product lacks some enterprise-class features for software distribution and OS deployment.
- FootPrints Asset Core lacks a strong community of users to share tips and best practices.

CA Technologies

CA Client Automation gets good feedback in terms of stability and code quality. The vendor has primarily focused on unifying physical and virtual desktop management, supporting VMware View, Citrix XenDesktop and most application virtualization products. CA’s visibility in this market is on the decline, with fewer Gartner clients considering Client Automation than in past years. Nevertheless, Client Automation is a good fit for organizations that are looking to manage HVD environments and physical desktops together, especially those that are customers of other related CA products, such as IT Asset Manager and Service Desk Manager.

Strengths

- Client Automation allows administrators to manage physical and virtual desktops similarly with specific features, such as the ability to maintain application assignments for dynamically assembled desktops for VMware View and Citrix XenDesktop.
- The product has strong software inventory management, providing multiple ways to identify software, including a unique capability called Intellisigs, which allows administrators to identify software more accurately than heuristics or signature-based methods.

Cautions

- Client Automation is behind the market in providing an integrated client and mobile management offering, although the vendor plans to announce its mobile strategy in the first half of 2013.
- CA is not investing in Client Automation aggressively, as evidenced by a lack of capabilities in emerging areas such as mobile and software as a service (SaaS)-based management, and an apparent lack of promotion in the field.

Dell Kace

Dell Kace is the only vendor in the client management tool market that offers its product exclusively as an appliance. Kace has two appliances targeted to enterprises — an OS deployment appliance and a separate appliance for life cycle management, which together represent its client management toolset. The Kace appliances have solid functionality that particularly addresses the needs of midsize organizations that have struggled with more-comprehensive and complex client management tools. We believe that Dell will continue to keep Kace focused on these market
segments. Kace added an MDM tool in 2012, which offers basic security policy enforcement. Dell plans to develop it into a more full-featured MDM tool in 2013. Kace now also supports HVD environments; customers report that the K1000 offering works well for persistent HVDs (due to the agent’s relatively low processing requirements), but it is not as well-suited for nonpersistent desktops. Kace is a good fit for organizations that want a product that is easy to deploy and easy to use; it is typically not a good fit for organizations that want to customize the product or for those that manage tens of thousands of clients centrally.

**Strengths**

- Kace appliances are easy to deploy, maintain and upgrade, which are among the major challenges of client management tools in general.
- The OS deployment appliance has intuitive functionality for image building and deployment processes.
- Dell Kace has one of the strongest user communities, driven by one of the largest installed bases in the market.

**Cautions**

- The core functions of the K1000 are not as comprehensive as many other competitive products in the client management tool market. Its software inventory lacks rich capability to identify installed software, and its software distribution lacks the ability to easily manage package dependencies.
- While Kace supports customers with up to 20,000 users with a single appliance, the K1000 is better-suited to organizations with 200 to 5,000 users, due to the product’s architecture.
- The Kace appliances are more difficult to customize than competitive products.

**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’s functionality is intuitive, allowing IT staff to start using the product quickly. Most DSM revenue is generated from European customers; Gartner has yet to see substantial adoption of the product in North America or Asia. FrontRange’s strategy is to increasingly tie DSM to its IT service and support offerings. As a part of this, FrontRange has released a SaaS platform for its IT service management (ITSM) and inventory offerings, and has incorporated DSM functionality in this platform as well.

**Strengths**

- Package building has long been a differentiator for DSM. Many offerings require third-party products for advanced application packaging; however, DSM provides a proprietary and wizard-driven module to help customers build packages.
DSM has advanced software distribution capabilities, enhanced in version 7.1 with a policy enforcement mechanism that ensures the appropriate packages and versions are installed on managed PCs.

The product 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

- Highly distributed organizations may have challenges. Customers report high server requirements to manage the distributed PC environments.
- DSM lacks tight integration with FrontRange’s on-premises ITSM offering.
- FrontRange does not currently have an MDM offering. It currently offers integration with third-party products, and plans to release a tightly integrated offering with a third-party MDM tool in 2013.

IBM

IBM Endpoint Manager excels in patch management, multiplatform support and overall scalability. IBM also released an MDM product in 2012, which is tightly integrated and competitive with the MDM products offered by other client management tool vendors. IBM will likely keep Endpoint Manager focused on large enterprises and meeting the requirements of those organizations, rather than on midsize customers. The product received strong marks on its integrated security and configuration management capability, as well as Mac management; however, it is trailing some competitors that offer more capability for nonpersistent virtual desktop patching and software deployment. Endpoint Manager is a good choice for organizations that are heavily focused on security configuration management (including patching), and those that require strong multiplatform server management in addition to client management, or scalability to support tens of thousands of endpoints. It is not as good a choice for organizations that require simple usability or tight integration with third-party service desk or asset management tools.

Strengths

- Endpoint Manager’s primary differentiator is that the tool’s intelligence is on the endpoint, rather than the server. This allows the agent to 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, enabling organizations to maintain high degrees of security configuration compliance.
- The product’s endpoint-oriented control, along with its relay server architecture, results in a relatively small server footprint to support the Endpoint Manager environment.
- Reporting, in particular Endpoint Manager’s Web reports, makes it easy for staff to get quick access to reports from the product’s database.
Cautions

- It is difficult to integrate Endpoint Manager with third-party adjacent systems, such as service desk tools and IT asset management repositories.
- Customers report that Endpoint Manager Software Use Analysis, a companion product that provides software asset analysis, sometimes delivers unreliable data and needs improvement.
- Endpoint Manager lacks strong historical reporting.

Kaseya

Kaseya provides a wide range of functionality, such as client management, MDM, service desk, network performance monitoring, data backup and endpoint protection, from a common console. The vendor mostly sold its product to managed service providers, but now sells directly to IT organizations for them to manage their internal environments. The majority of Kaseya’s enterprise customers use its product on-premises, but we believe the vendor will increasingly focus on enhancing its functionality in its SaaS platform, which includes most of its client management capabilities. While Kaseya does have some large customers, most of its customers are midsize enterprises. The vendor is a good choice for organizations that value a single solution for client management, endpoint security and service desk through the same console. Kaseya is starting to add more large enterprise capability, but it is less proven than some competitors at supporting tens or hundreds of thousands of users.

Strengths

- Kaseya is ahead of most vendors in offering SaaS-based client management, allowing for Internet-based management and general administrative ease of use.
- The vendor’s products offer a wide range of client management functionality, including capabilities that many other client management tools don’t offer, such as PC backup and system performance monitoring.
- Kaseya provides strong capabilities to track, audit and report on endpoint management tasks.

Cautions

- Kaseya’s client management tool lacks comprehensive software inventory capabilities, such as metering and title rationalization.
- Mac management capabilities are immature, currently lacking patch management, power management and OS deployment.
- Kaseya’s agent does not manage HVD environments well; in particular, it has challenges supporting nonpersistent desktops.
LANDesk

LANDesk Management Suite (LDMS) is one of the most complete client management tools in the market. The "sweet spot" for LDMS is in the 2,000- to 15,000-user range, although lately we've seen the product scale better to support larger environments as well. It is one of the most capable products in the market at managing branch office users through its Targeted Multicast technology's Peer Download option. LANDesk released LDMS version 9.5 in the fourth quarter of 2012 with a large number of enhancements, most notably strong software inventory and enriched HVD support, including software usage monitoring for nonpersistent desktops, something most other products don't offer. The vendor has been focusing on mobility lately, and acquired MDM vendor Wavelink in 2012. LANDesk introduced a new pricing model that allows customers to license the LANDesk suite of management and security products by user, rather than device. This enables organizations to more easily license LANDesk products for users who have multiple devices. LANDesk is a good fit for organizations that require strong distributed office user management, patch management, and combined Windows, Mac OS X and MDM.

Strengths

- LDMS has a feature called Targeted Multicast with a Peer Download option 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 LANDesk Service Desk are well-integrated with LDMS.
- The LANDesk workflow tool allows organizations to automate common processes such as patch deployment and employee onboarding, along with many others.

Cautions

- OS deployment is not as strong as many competitive offerings, with customers often using work-arounds or third-party tools to migrate and image PCs.
- The LANDesk console is outdated and in need of an update. The Web console does not provide the same capability as the thick-client console.
- It can be difficult to understand the status and health of the LANDesk infrastructure, in particular monitoring the status of scheduled tasks and understanding when and why tasks fail.

Matrix42

Matrix42 Workplace Management is a good choice for organizations that manage a complex endpoint environment composed of physical PCs, virtual desktops and mobile devices. The core client management features for software distribution, OS deployment and inventory are strong, and Matrix42 has especially focused on Citrix virtual desktop environments in recent years. The virtual desktop management capabilities are stronger for Citrix XenDesktop and XenApp; VMware Horizon View is not currently supported. Matrix42 also has an MDM offering through an OEM agreement with AirWatch, and it has tied the MDM capabilities into its end-user self-service console. Matrix42’s challenge is primarily its lack of a presence outside of Europe. In a mature client
management tool market, it will be challenging for Matrix42 to grow its business in North America with its limited installed base in the region.

**Strengths**

- Matrix42’s management functionality for Citrix XenDesktop and XenApp allows administrators to create and manage physical and virtual desktops using the same process and console.
- Matrix42 Workplace Management gets particularly strong feedback regarding low agent resource consumption on managed clients.
- 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**

- The vendor’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 Matrix42 Workplace Management experience.
- Mac management capabilities are incomplete, currently lacking patch and power management.
- Matrix42’s reporting capabilities are based on Microsoft SQL Server Reporting Services, which might make it challenging for customers to create customized and ad hoc reports.

**Microsoft**

Microsoft has the largest market share in the client management tool market. This is due, in part, to Microsoft’s licensing strategy of offering System Center Configuration Manager (Configuration Manager) as a part of the Core and Enterprise Client Access Licenses. Microsoft released System Center 2012 Configuration Manager in April of 2012, as well as SP1 in January 2013. This was a major rewrite of Configuration Manager, with significant architectural changes and many improved capabilities. Specific improvements include enhanced software distribution, some limited Mac OS X support, a simplified infrastructure, role-based access control and improved endpoint desired state (including an ability to monitor the Configuration Manager agent itself). Microsoft has also been advancing its strategy of moving client management to the cloud with Windows Intune, a separate, SaaS-based client management product. The vendor has been working on making Windows Intune more cost-effective for Configuration Manager customers through joint licensing and product integration. The latest version of Windows Intune, Wave D, includes MDM for Windows Phone 8, Windows RT and iOS devices, and is a viable option for organizations that require basic MDM capabilities. However, Microsoft does not position this as an MDM product that is competitive with the leading MDM players in the market. Microsoft plans to expand its support of mobile platforms, but will be challenged to effectively support the growing heterogeneity of endpoint devices with the inherent motivation to optimize the management of the Windows client and mobile platforms.
Strengths

- Configuration Manager has a scalable architecture, and its scalability has been proven through many large customers.
- Software distribution is very strong in System Center 2012 Configuration Manager, including much more intelligence and user awareness.
- Configuration Manager has strong integration with Microsoft App-V, which has become the most widely used application virtualization product.

Cautions

- Configuration Manager is a server-heavy product in highly distributed environments, which adds cost and complexity for organizations with a large number of small sites.
- Configuration Manager lacks patch management for most non-Microsoft desktop applications. Organizations must patch most non-Microsoft applications through traditional software distribution or third-party patch management tools.
- Configuration Manager does not have strong software asset management capabilities; customers often use its software inventory with a third-party software asset management tool.

Novell

Novell ZENworks Configuration Management (ZCM) is a competitive client management tool with inventory, OS deployment and patch management features that are comparable to competitive products. Its software distribution is strong, offering advanced capabilities for managing application package dependencies and deploying applications to users (rather than merely machines). While ZENworks' support has not been strong in some regions, particularly Australia, Novell claims that business performance overall has improved in 2012, and we saw some evidence of this, with more clients staying with ZCM than we’d seen in past years, and a handful of clients that had no prior relationship with Novell considering ZCM. Novell ZENworks is a good product, and organizations that are experienced and satisfied with it should have no compelling reason to switch.

Strengths

- The primary management targets for ZCM are users, not machines. This positions ZENworks well to manage portable user workspaces, rather than strictly user machines. Because ZCM is hooked into the user's profile, it can present myriad application types (local, virtual and Web) 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 in many competitive products that may require more scripting or manual effort.
Cautions

- Novell does not have a strong brand in this market, and we continue to see few organizations considering ZENworks outside legacy Novell customers upgrading from an old version of ZENworks to ZCM.
- ZCM is a strong product; however, the products that Novell positions around ZCM (e.g., ZENworks Endpoint Security Management and ZENworks Asset Management) do not have a strong market presence.

Symantec

The Symantec Altiris Client Management Suite (CMS) is a very comprehensive client management product. The strength of CMS lies in its breadth of functionality, including core features of client management (inventory, software distribution, OS deployment, software metering and patch management), plus pcAnywhere for remote control, Workflow Solution, Workspace Virtualization and Workspace Streaming. It is the second-most widely used product in the market. CMS is one of the most sophisticated tools in the market, but requires significant training and product understanding. Symantec continues to struggle with product stability issues, support and the ability to meet promised timelines. The vendor has long shown a lack of commitment to the Altiris product line, and must demonstrate that Altiris is strategic to Symantec’s long-term goals.

Strengths

- CMS offers great flexibility in managing endpoints; there are many ways to execute the various functions, allowing administrators to tailor the product to meet their processes.
- Altiris Workflow Solution very effectively automates common processes, such as employee onboarding, end-user application self-service and Windows 7 migrations. It can also help organizations better manage large, complex client environments.
- Symantec has a large installed base of customers, with an active community of user groups and online forums.

Cautions

- Product performance issues, including hierarchy replication problems, task scheduling errors and console slowness, continue to plague CMS through version 7.1.
- Some areas of CMS are stronger in version 6 (in particular, Altiris Deployment Solution), leading customers to run a mix of version 6 and version 7 product components.
- Customers have consistently expressed concerns about Symantec support; specific complaints range from a lack of useful documentation to slow responsiveness to inconsistent support quality.
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
No vendors were added to this Magic Quadrant.

Dropped
HP Client Automation (HPCA) is a very scalable client management tool. However, HP has not focused closely on the HPCA product, and recently entered into an exclusive licensing agreement with software product and technology service company Persistent Systems. All product development and the road map are managed by Persistent, effective 13 February 2013, and the product is called Radia Client Automation. Persistent Systems is not included in this Magic Quadrant because, as of the publication of this research, the client management product is still being transitioned to Persistent from HP. As a result, the vendor was not able to supply the reference accounts as required, and Gartner is unable to validate Persistent’s ability to meet customer product and support needs. HPCA is a powerful product, and Gartner will track Persistent’s progress as it takes ownership and moves the product forward.

In 2012, we had separate positions for BMC BladeLogic Client Automation and Numara FootPrints Asset Core. On 30 January 2012, BMC Software acquired Numara, leaving BMC with two client management tools. We believe the FootPrints Asset Core product will represent BMC’s focus for client management, as evidenced by our judgment of BMC’s strategy and the fact that virtually all BMC client management deals that Gartner has seen involved FootPrints Asset Core.

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 includes:

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

While not necessary for Magic Quadrant inclusion, the management of non-Windows devices is becoming increasingly important and influential in client management purchasing decisions. Organizations are increasingly looking to extend much of the client management functionality described above to iOS, Android, BlackBerry, Windows Phone/Windows RT and Mac OS X. Consequently, this Magic Quadrant will place greater emphasis on the management of these platforms.

Other inclusion criteria for this Magic Quadrant include:

- Client management product revenue must exceed $5 million per year.
- The product must be of interest to Gartner clients by appearing on their product selection shortlists.
- The vendor must provide at least five references for its client management product.

Evaluation Criteria

**Ability to Execute**

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

**Product/Service:** We evaluated the core features of client management:

- Software distribution
- Hardware and software inventory, including software usage monitoring
- OS deployment
- Patch management

Other client management functions, such as remote control, power management and application packaging, were evaluated, but received less emphasis than the core features listed above. Mature IT organizations are increasingly using workflow capabilities to automate client management
processes. We also evaluated scalability, usability and product administration 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.

**Market Responsiveness and Track Record:** We evaluated execution in delivering products consistently and in a timely fashion, the agility to meet new market demands, and how well the vendor received customer feedback and how quickly it was built into the product. We also looked at the vendors’ ability to meet promised timelines.

**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 customers’ feedback regarding their experiences working with the vendor, whether they were glad they chose the vendor’s product and whether they planned to continue working with the vendor. User communities are increasingly important to the customer experience; we looked at the presence of user groups and vibrancy of online forums.

Table 1. Ability to Execute Evaluation Criteria

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

Source: Gartner (April 2013)
Completeness of Vision

The Completeness of Vision axis provides an aggregate measure of a vendor’s likelihood of future success in the client management tool 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 evaluates vendor capabilities against future market requirements. It describes the degree to which vendors understand current and future customer requirements, and have a timely road map to provide this functionality.

**Sales Strategy:** The criterion evaluates the vendor’s route to market (e.g., direct versus indirect sales) and the strength of the offerings that go to market with the vendor's client management tools (e.g., endpoint security, service desk, asset management). We also evaluate the vendor’s pricing models and whether they map to customer requirements.

**Offering (Product) Strategy:** The market requirements map to the market overview discussion above:

- **MDM:** This considers whether the vendor has a strong capability to manage smartphones and tablets, such as iOS, Android, Windows Phone, Windows RT and BlackBerry. While MDM is not necessary for inclusion in this Magic Quadrant, it does significantly influence Visionary placement.

- **Mac management:** This evaluates product capabilities, plans to manage Mac OS X, 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. Application virtualization and HVD support are particularly important capabilities.

- **Integration with IT service desk and asset management:** This considers 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.

- **Endpoint security:** This evaluates whether the vendor has relevant endpoint security capabilities, and whether those capabilities are integrated with the client management product. Endpoint security includes security configuration management capabilities in the client management toolset, as well as endpoint protection tools offered as adjacent products.

- **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.

This year’s Magic Quadrant places greater emphasis on MDM, virtual desktop and application management, and alternative delivery models. Although still important, we reduced the emphasis on service desk, asset management and endpoint security.
**Business Model:** We considered whether the vendor's client management tools are important to the vendor's overall success, and whether its client management tool business is staffed and funded adequately to succeed.

**Geographic Strategy:** This criterion evaluates 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.) We also evaluated the vendor’s strategy to penetrate emerging markets.

**Table 2. Completeness of Vision Evaluation Criteria**

<table>
<thead>
<tr>
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<td>Market Understanding</td>
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<td>Geographic Strategy</td>
<td>Standard</td>
</tr>
</tbody>
</table>

*Source: Gartner (April 2013)*

**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
- The ability to meet the requirements of large and mature desktop engineering organizations
- 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, or demonstrating 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 capabilities in the 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. There are no Challengers in this year’s Magic Quadrant.

**Visionaries**

Visionaries have vision scores that reflect feature complete products, and they show technology leadership in providing some life cycle management functions that users have begun requesting, or that 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., MDM, Mac management, appliances, SaaS, desktop virtualization), but may lack a fully mature life cycle management solution, 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 the 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**

Client management tools all perform the same set of core functions. The right tool for any organization depends on a large number of factors, including, but not limited to:

- Scalability
- Ease of use
Support for Mac or mobile devices
Application and desktop virtualization support
Endpoint security requirements (e.g., patching)
Prior experience with particular products
Availability of desktop engineers and administrators
Skill level of IT staff
Depth of specific functions
Integration with other IT management tools (e.g., service desk)
Specialized functionality for PC hardware manufacturers
SaaS delivery options

Organizations should not merely choose from vendors in the Leaders quadrant; they should create a list of criteria that describes their 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 their needs for at least the next five years. The focus should be on skills, training, process and proper product implementation, because these factors will influence an organization's product experience more than the specific functional capabilities.

Market Overview

Client management tools are widely used in large and midsize organizations to track inventory of client assets, automate system management tasks and maintain a standard computing environment. The tools have existed for more than 15 years, but changes in enterprise client computing continue to impact the market. Enterprises are using more client management features in the traditional Windows environment, such as software usage monitoring, self-service application deployment and application patch management. More significantly, organizations are supporting more types of endpoints, such as smartphones, tablets, Macs and HVDs. Virtually all organizations are affected by at least some of these changes, and they must determine the appropriate management tool strategy.

Windows 7 migration is a convenient time to improve client management practices. The migration leads organizations to rationalize their inventory of supported applications, and the introduction of a new platform standard provides a good opportunity to introduce new management practices as well.

The core functions of client management remain inventory, software distribution, OS deployment and patch management. Vendors have been advancing these functions to various degrees:

- Self-service software distribution will become a common practice to reduce application overprovisioning and overall IT administrative effort. Client management tool vendors, as a
whole, are weak in this area. Many vendors will add this function in their service desk module, but we believe organizations will want the option to use this functionality within their client management tool as well.

- Organizations are tracking software assets and monitoring their usage more closely, thus increasing the importance of software asset management capabilities. Client management tool capabilities in this area vary significantly in terms of their ability to accurately report installed software and monitor usage. Unlike some areas that have commoditized to a greater extent (e.g., OS deployment), this is an area that differentiates products substantially.

- Desktop application patch management, while not new, is becoming a more common practice. As organizations continue to mature Windows OS patching, their focus will shift to third-party applications, such as Java and Adobe products.

- Workflow capabilities are becoming more prominent in client management tools to automate various processes, such as self-service software distribution, OS deployment, patch distribution and numerous other administrative functions. Organizations with mature processes should look to these functions to further automate their processes and reduce administrative effort.

- Vendors are increasingly offering their products as SaaS offerings or appliances. The appliance model has been more successful to date, but the future state of client management will be a hybrid of on-premises and SaaS-based functionality. SaaS-based offerings in this market are new and unproved, and should be used for specific functions (e.g., patching) or use cases (e.g., mobile laptop users).

Desktop virtualization, in its many forms, continues to grow in adoption. Client management tools are particularly important for deploying and managing virtualized applications as well as HVDs. Many application virtualization tools offer weak management functionality for deployment and license enforcement, thus requiring a client management tool to fulfill this purpose. Close to 20% of the references for this Magic Quadrant use their client management tool to manage HVDs, an increase from prior years. Client management tool requirements vary depending on the type of virtual desktop in use; persistent desktops have different management tool requirements than nonpersistent desktops. Persistent desktops must be managed similarly to physical PCs, but client management tools must still be developed to work properly in an HVD environment, so organizations should not assume that all client management tools work well in an HVD environment by default. Nonpersistent desktops have a different set of client management tool requirements. Some organizations believe that nonpersistent desktops do not require client management tools at all, due to their ephemeral nature. However, we think most organizations will use a subset of client management tool capabilities, such as inventory, remote control and perhaps software usage monitoring, to manage nonpersistent desktops. Client management tool support of nonpersistent desktops is more complicated and is a significant point of differentiation between products.

The growth of non-Windows endpoints and the diminution of Windows are the most impactful trends in the client management tool market. In particular, organizations are struggling to support the growing landscape of smartphones and tablets. Organizations should not replace a client management tool that is working well to get mobile device support; rather, they should use a separate MDM tool that meets their needs. However, most client management tool vendors now
have MDM capabilities, as 11 of the 12 vendors in this Magic Quadrant now offer some level of MDM — in most cases, as add-on products that operate from the same console. Organizations that are purchasing client management tools should closely evaluate the MDM capabilities of the vendors, as the convergence of client management and MDM is still immature.

During the next five years, organizations will use client management tools to transition toward the personal cloud. Organizations will transition from traditional system management to managing only what matters, and, in many cases, this will be the applications and data, not the device itself. Successful client management vendors will continue to offer comprehensive Windows client management to manage PCs, but will enhance their offerings to manage mobile devices, mobile applications and, eventually, SaaS applications. Organizations should develop their own client computing road map, and adopt a client management tool strategy that aligns with it.

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 Definitions

**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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