

Magic Quadrant for PC Configuration Life Cycle Management Tools

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This Magic Quadrant covers PC configuration life cycle management products. When preparing for Windows migrations, embracing virtualization technologies or improving desktop management processes, organizations should select the right vendor for their needs.

WHAT YOU NEED TO KNOW

This document was revised on 9 December 2009. For more information, see the [Corrections](#) page.

Gartner's Magic Quadrant for PC Configuration Life Cycle Management Tools (PCCLM) evaluates vendors' ability to execute and their completeness of vision relative to a defined set of evaluation criteria regarding current and future market requirements. A Magic Quadrant should not be the only criterion for selecting a vendor, because the right solution for a given situation can be in any quadrant, depending on the specific needs of the enterprise. Organizations that are considering PCCLM tools for the first time should develop their own list of evaluation criteria based on functional requirements, usability, and scalability. Organizations that are replacing a tool that doesn't meet their needs should examine why (e.g., usability, scale, lack of partner support, deficient functionality) and select a vendor that best fits their needs. Do not let price alone drive the product decision. Consider the total cost of the product over a multiyear period.

Gartner used several sources of information for the Magic Quadrant analysis. Every vendor completed a survey that contained questions about product specifics and business performance. Additionally, each vendor completed a two-hour product demonstration covering common desktop management use cases. We spoke with customer references (see Note 1) for each vendor, 50 in total. We also received input from 96 references in the form of a Web-based survey (some of the customers that responded to the survey were also organizations that we spoke with, so there was some overlap). We also spoke with channel partner references for several of the vendors to get feedback on business performance. Finally, Gartner has had over 400 end-user client discussions on desktop management in 2009, many of which involved product issues and decisions. We used the feedback from these client interactions as part of the overall analysis.

MAGIC QUADRANT

Market Overview

The PCCLM tools market is a large and mature market. Gartner estimates PCCLM to account for about 80% of the configuration market, setting it at about \$2.1 billion in 2008. Among IT operations management tools, PCCLM tools have one of the most obvious returns on investment, which is to manage the client environment in an automated, one-to-many fashion, rather than on a manual, one-to-one basis. While the market is mature, with fewer differences between products than there were five years ago, it is still active.

Note 1 Customer References

We verified customer references for the vendors' product versions, as shown above. However, these product versions may not reflect what vendors are shipping. Vendors' product road maps were evaluated within the Completeness of Vision criteria.

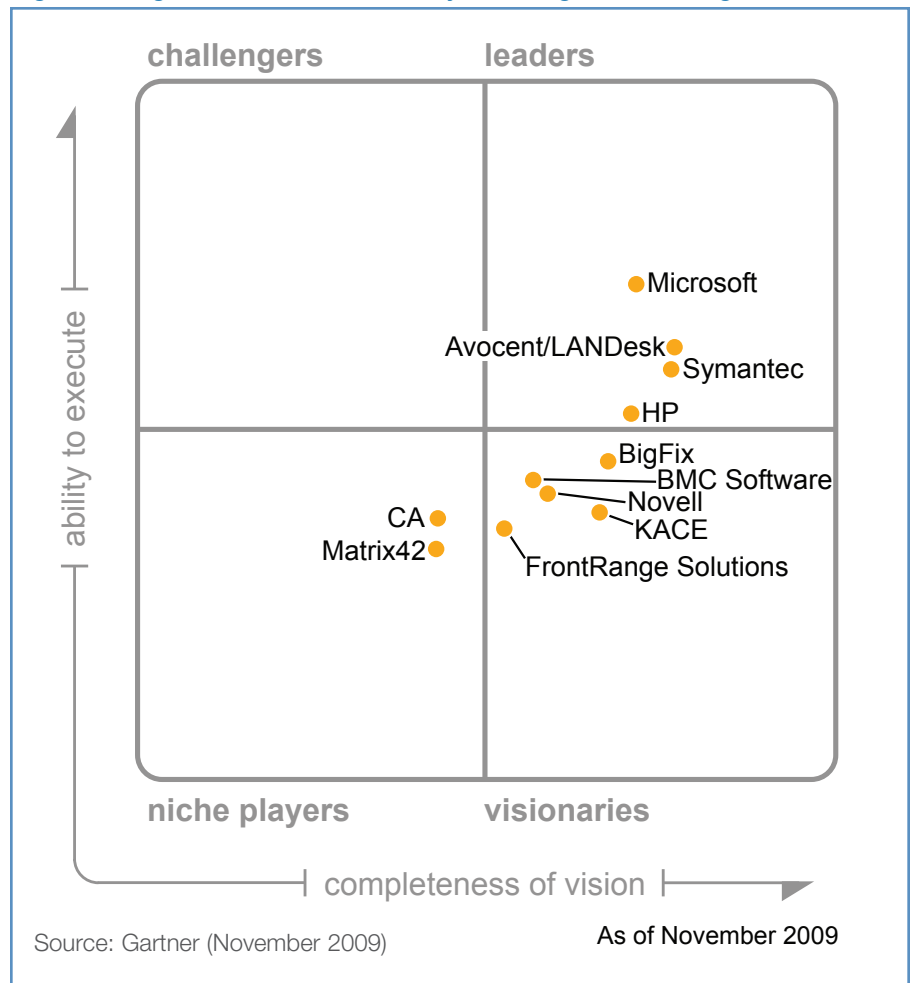
Many organizations, particularly midsize organizations (i.e., environments with fewer than 5,000 PCs) are buying PCCLM tools for the first time. Gartner's client inquiries in 2009 revealed that about 45% of the organizations that were making product selections were buying a suite for the first time. The primary reason for this is that the successful use of PCCLM tools requires some commitment to process maturity, personnel training, and standardization. IT infrastructure and operations is still an immature discipline, so this relative lack of market saturation is not so surprising, considering these broader issues.

In the large enterprise, consolidation of products to a single toolset is the most common situation. There are two common scenarios: centralization of management in large distributed organizations and consolidation of tools resulting from mergers and acquisitions (M&A). PCCLM tools were one of the first IT operations management tools to be adopted when IT organizations were largely decentralized. As these organizations have matured and the tools have become more similar, a realization that efficiencies would be gained from centralized decision making and processes is driving tool consolidation projects. M&A continues to be a factor driving vendor selection, particularly in the financial services industry. Financial institutions generally have the process maturity and resources to execute tool consolidation, as well as a particular need to do so for compliance reporting.

Desktop Virtualization

Desktop virtualization is one of the hottest areas within infrastructure and operations, and a disruptive force in the PCCLM market. Desktop virtualization is not just one product, but is a category of technologies that offers the general value proposition

Figure 1. Magic Quadrant for PC Life Cycle Configuration Management



of making the client environment easier to manage and/or more flexible for the user by separating components of the desktop environment. Examples of desktop virtualization are hosted virtual desktop (HVD), application virtualization, work space virtualization management, and composite client management. While not all are complete configuration management solutions, desktop virtualization technologies do offer management functionality such as operating system (OS) provisioning, software delivery, inventory, and OS patching, and threaten to handle some of the responsibilities historically managed by PCCLM tools. This is a concern voiced by customer and partner references, requiring PCCLM vendors to show value to justify their existence.

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The reality is that very few organizations will manage every user's personal computing environment with one client architecture. End users have diverse needs, and will require client architectures and management tools that suit them. Static desk-based workers may be well-suited in an HVD environment, roaming users may be a fit for work space virtualization, and mobile and power users may require their applications and data to reside locally on their machines. While these new technologies offer management and usability benefits, the diversity that's created presents new management challenges. Organizations are expressing the need for a unified view and management platform for managing users, delivering applications, and managing systems. PCCLM vendors have the opportunity to be the "single pane of glass" to manage all client environments. Virtualization leads to repackaging of desktop environments and components of those environments. How these virtualized packages "fit" with PCCLM tools and management processes is critical to successful deployments. Organizations should not deploy desktop virtualization technologies until sure they can manage the resulting virtualized components.

They will also have to adapt to ensure that their tools are not rendered outmoded by newer approaches to desktop management. The PCCLM market establishment will be challenged during the next five years by emerging desktop virtualization vendors that are aiming to solve the manageability problem with new approaches. Citrix and VMware have focused mainly on HVD; however, they are working to address mobile and offline users to increase their footprint by leveraging emerging client-side hypervisor technology. A number of smaller vendors have emerged in an attempt to provide centralized management while allowing users more flexibility than is currently possible with traditional thick-client, server-based computing, or HVD approaches. Vendors like Unidesk, Viewfinity, and Virtual Computer position themselves directly against PCCLM vendors. Others like MokaFive and RingCube position themselves as complementary; however, even these vendors offer management capability that overlaps with some of the delivery and installation functions from PCCLM vendors. As PCCLM vendors adapt to changing client architectures, they will simultaneously be challenged by these newer desktop management vendors.

Expanding Responsibilities: Asset Management, Security, and Power Management

While desktop virtualization redraws the boundaries of client computing, the boundaries that define desktop management responsibility continue to be redrawn as well. Desktop operations have become increasingly responsible for enforcing policy on the desktop. The term "policy" can refer to any rule that defines how the PC should be configured, and what it should and shouldn't have. The groups that define these rules can be IT security, IT asset management, or the business that may have policies about what should be on the PC.

The economic downturn has created two parallel forces driving organizations to increase their focus on asset management. The first is the increase in software license audits over the last 18 months as software vendors use auditing as a means to generate additional revenue. The second is the recognition that organizations may be spending more on software licenses than they should. The software usage capability within PCCLM tools provides data about which application users aren't actively using. With this information,

IT managers can decide which licenses can be harvested. The majority of vendor references stated that they do not monitor software usage today, but most of these organizations also stated that this is a project on their to-do list.

The convergence of security and operations continues, albeit at a slow pace. There are several factors driving this convergence. Many security risks that organizations face are the result of missing patches or misconfigured systems. Part of a sound security strategy involves the capability to quickly deploy system changes to a large number of PCs, which is an IT operations competency. While security and operations have different goals, many of the methods they use to achieve them are the same. For example, standardization and desktop lockdown are critical to both availability and security. The distribution infrastructure for software and patches is critical to the objectives of both groups, and much of the inventory data that is used for operational purposes is also used for security configuration assessment. There are two basic security categories that are merging with PCCLM:

- **Security Configuration Assessment:** Organizations are looking for tools to reduce the window of exposure by automating the discovery of vulnerabilities and their remediation. We've seen several PCCLM vendors include vulnerability assessment capabilities in their products (some directly in the PCCLM tool), which then use their existing patching, scripting, and package deployment capabilities to remediate the discovered weak spots. Only about 15% of references stated that they were using or planning to use the vulnerability management capability in their PCCLM tools; however, we believe this is an area that will increase in adoption during the next several years as organizational convergence continues and vendors mature their offerings.
- **PCCLM and Endpoint Protection:** The PCCLM and endpoint protection markets are both mature. There is less of a need for best-of-breed point solutions than there was five years ago, and organizations are placing greater value on the integration between these sets of tools and the preservation of a single vendor strategy. For example, with this type of capability, the PCCLM tool can discover the last time a machine's antivirus (AV) client scanned, and force a scan if appropriate. The implication here is that security can set the policy that defines when scans must take place, but the discover, detect, remediate function can be handled by operations, which is its competency.

Controlling PC power states has emerged as a desktop management function over the last two years, and Gartner predicted that, by 2012, more than 50% of midsize and large organizations will centrally manage desktop power states. Most client inquiries on this topic over the last two years have led organizations to consider PC power management tools, which have premium functionality in the areas of reporting, wake on LAN, graceful shutdown, and other functions that help achieve a balance between power management administration and leaving users undisturbed. A surprising 45% of the vendor references for this Magic Quadrant reported that they are doing PC power management today, and 71% of this group said that they are using their PCCLM tools to do so. PCCLM tools have been adding power management functionality over the last 18 months, and we expect them to become increasingly sufficient to meet basic customer requirements.

Alternative Delivery Models

The standard design of PCCLM tools is on-premises installed software. In recent years, we've seen the appliance model gain market acceptance, particularly in the midmarket, where the resources required to install and maintain a conventional, on-premises software product are less likely to be readily available. There appears to be healthy demand for software-as-a-service (SaaS)-based PCCLM solutions, mostly in small to midsize organizations and environments that lack the specialized IT skills to use a traditional PCCLM tool effectively. Roughly 40% of the vendor references for this Magic Quadrant stated that they would consider SaaS-based PCCLM tools for various functions (inventory, software distribution, patch management, and remote control). The driving force behind this demand is the extended implementation time it takes to deploy, manage, and upgrade on-premises PCCLM tools. There is no prominent example of a SaaS-based solution in the market yet, but this will change. Microsoft will enter the uncrowded SaaS PCCLM space with System Center Online Services, a hosted version of its System Center Configuration Manager (ConfigMgr) product targeted at the small to midsize market. Other vendors will likely enter this segment of the market as well in the next three years.

All of these factors continue to drive the market forward. We believe that the impending migrations off Windows XP, either to Vista or (more likely) Windows 7, will cause churn in the market, and will lead many organizations to buy new PCCLM tools to manage the new computing environment. Windows migrations are opportune times to make changes to management processes and tools because the platform and all the applications get completely retested and the new OS may have new management capabilities to leverage (e.g., User Account Control and BranchCache).

Market Definition/Description

PCCLM tools manage configurations and support systems 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.

Inclusion and Exclusion Criteria

The PCCLM product must include modules for inventory, software distribution, OS deployment, patch management, remote control, and software usage monitoring. There are several other capabilities we evaluate, including application virtualization/streaming, security management, power management, data/settings migration, and software packaging with conflict resolution.

The vendor must have at least 10 client references that are using the PCCLM product.

Gartner client inquiry data must confirm that the product is of interest to Gartner clients in enterprise environments by making their product selection shortlists.

Added

Added: KACE

Dropped

Dropped: ManageSoft

ManageSoft has a PCCLM product called ManageSoft Enterprise Deployment Suite. ManageSoft's visibility in the PCCLM space has been declining over the last three years, and did not meet the requirements for this year's Magic Quadrant because Gartner client inquiry did not confirm that Enterprise Deployment Suite is of interest to Gartner clients. ManageSoft still sells its PCCLM suite, which has strengths in mobile- and distributed-user support. However, ManageSoft's primary focus today is software asset management.

Evaluation Criteria

Ability to Execute

The Ability to Execute axis measures the vendors' current capabilities and overall performance in the PCCLM market.

- **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.
- **Overall Viability:** This criterion evaluates the size of the vendor and its financial performance. We also evaluated the size and growth of the vendor's PCCLM 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 Asia/Pacific (including Japan).
- **Market Responsiveness and Track Record:** We evaluated the 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.

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	high
Marketing Execution	standard
Customer Experience	standard
Operations	no rating
Source: Gartner (November 2009)	

We evaluated the degree to which customers and partners have positive identification with the PCCLM product, and whether the vendor has credibility in this market. We also used search hits on gartner.com for the vendor and product as one measure of brand recognition and market awareness.

- **Customer Experience:** We assessed the vendor's reputation in the market, based on customers' feedback regarding their experience in working with the vendor, whether they were glad they chose the vendor's product, and whether they planned to continue working with the vendor (see Table 1).

Completeness of Vision

The completeness of vision scale provides an aggregate measure of a vendor's likelihood of future success in the PCCLM market. We evaluated vendors' statements about future product direction, the degree to which current capabilities map to future demands, the focus of the vendor on PCCLM requirements, and their establishment of sales and reseller channels through which to sell their products.

- **Market Understanding:** For this category, we evaluated five emerging areas that will have significant impact on PCCLM buying decisions:
 - **Desktop Virtualization:** We evaluated vendor strategies and visions for helping customers manage virtual desktop environments (HVD, application virtualization, work space virtualization, etc.), and what desktop virtualization technologies vendors may offer to help improve manageability. We evaluated the capabilities PCCLM vendors have to manage application virtualization products. About 66% of the Magic Quadrant references stated that this type of integration between their PCCLM products and application virtualization tools is critical.
 - **Service Management Strategy:** As organizations increasingly buy PCCLM along with service desk and asset management solutions, we evaluated the vendors' ability to sell PCCLM solutions in this context.
 - **Security and Operations Convergence:** We evaluated each vendor's strategy for supporting security and operations groups that will increasingly work together to identify and mitigate risk.
 - **Alternative Delivery Models:** The PCCLM market has started to see alternative models to on-premises software emerge, and Gartner thinks there is a market for models like appliances and SaaS. We evaluated vendor plans and strategies to exploit these opportunities.
 - **Non-PC Client Management:** While still early, we have seen a slight increase in demand for management of Macs and smartphones. Gartner believes this demand will increase during the next three years for management of both Mac and smartphone devices. We evaluated PCCLM vendors' strategies and capabilities in managing these platforms.

- **Marketing Strategy:** We evaluated the vendor's capability to deliver a clear and differentiated message that maps to current and future market demands, and, most importantly, the vendor's commitment to the PCCLM market through its website, advertising programs and positioning statements.
- **Sales Strategy:** We assessed the vendor's approach to selling PCCLM solutions, how geographically diverse the vendor is from a sales and support standpoint, and the breadth of sales channels through which to sell its PCCLM solutions.
- **Offering (Product) Strategy:** We evaluated the breadth of vendors' PCCLM offerings, as well as the depth of functionality within each module. In addition, we specifically evaluated software distribution, inventory, OS deployment, patch management, software usage, remote control, application packaging, power management, security configuration assessment, and application virtualization.
- **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 PCCLM to the company or business unit, and whether the vendor has shown a propensity to innovate to establish differentiation.
- **Geographic Strategy:** About 82% of configuration management revenue came from North America and Europe; however, Gartner is predicting high growth in other parts of the world, particularly in Asia. We evaluated the vendor's ability to meet the requirements of organizations in emerging economies based on language support and the presence of sales/support staff, as well as channel partners, in different geographies (see Table 2).

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	high
Geographic Strategy	low
Source: Gartner (November 2009)	

Leaders

Positioning in the Leaders quadrant is the result of successful completeness of vision and ability to execute. These vendors have succeeded in at least some or all the following areas:

- Attention to future client demands in PCCLM (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
- 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 a keen ability to execute; however, when compared with competitors, their products lack complete functionality and have comparatively few features that are viewed as necessary to shape the future of the market. Their ability to execute will be proved by their high market share and their appearance on numerous shortlists. These capabilities are bolstered by overall industry-leading fiscal health and broad geographic presence. Basically, challengers are followers with superior marketing and sales execution. They reach their market positions because they price products aggressively, bundle products with others, or sometimes give them away.

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 will have an impact during the next year or two. A visionary appears on shortlists because it offers a complete solution and a larger story for multiple adjacent management needs (for example, service desk, endpoint security/security configuration management, virtualization, server management or asset management). However, its ability to execute is hampered by its size, lack of brand recognition, or focus. Its sales force may be smaller than those of other vendors — or it may be very large, but concentrates less on PCCLM.

Niche Players

Niche players can be very good choices. They may have strengths in particular areas, but don't have the resources or focus to invest in all the requirements that we evaluate for vision. They also have less visibility than other vendors in the market; this could be a

function of geographic focus, or due to the vendor's focus on addressing a narrow market need. Organizations that are looking for products with certain strengths or in certain geographies may find that a niche player's products offer superior capability and support over other vendors in a Magic Quadrant.

Vendor Strengths and Cautions

Avocent/LANDesk

Avocent/LANDesk Management Suite version 8.8 (LDMS)

Avocent/LANDesk is a well-known PCCLM vendor that has a complete PCCLM product (LDMS), along with competitive products for endpoint protection and service desk. LDMS has some of the best capabilities for package deployment and patch management. It has a large system of channel partners through which it sells its product; however, it also has a reputation for being aware of and responsive to customer feedback. While large enterprises account for a substantial percentage of LANDesk's revenue, Gartner primarily sees LDMS in midsize organizations (about 1,000 to 5,000 PCs).

Strengths

- LANDesk continued to show up frequently in our client discussions in 2009, and partners reported growth in LANDesk sales despite the challenging economy.
- Software distribution is very strong, particularly for remote sites. The targeted multicast and peer download capabilities get good feedback from customers.
- The LANDesk Management Gateway appliance offers a useful mechanism for managing users of standard Internet protocols, rather than relying on LAN or virtual private network (VPN) connections.
- LANDesk has taken a visionary position in the security and operations convergence trend by offering tight integration between LDMS and the LANDesk Security Suite.

Cautions

- The Web-based console only contains a subset of Win32 client capability, a concern for organizations that must give administrators full functionality with Web-only access.
- LANDesk doesn't offer a software catalog to help rationalize discovered software titles in version 8.8; customers must do this manually. LANDesk is adding a software catalog to version 9 of LDMS, due to be released in December 2009.
- LANDesk tends to be more expensive than competitive solutions.

BigFix

Systems Lifecycle Management Pack 7.2

BigFix is a relatively new player in the PCCLM market. Its heritage is in the patch management space, but it has broadened its portfolio to include additional PCCLM functions, endpoint protection, and security configuration assessment. We primarily see BigFix in large organizations; it targets customers with more than 7,500 PCs. BigFix has a strong brand evidenced by frequent showings on Gartner client shortlists, and the company name has high search hits on gartner.com. BigFix also been early to move on security and operations convergence and PC power management trends. BigFix is usually chosen when the customer's environment is highly distributed, best-of-breed patching capabilities are required, or there is a desire to tie the operational and security management together with a bundle of integrated tools. Since BigFix is relatively new to the PCCLM space, it still must make improvements in areas like software distribution, and there are gaps that must be filled with third-party tools.

Strengths

- BigFix has a scalable and lightweight architecture, requiring fewer servers than those of competitive products. The relay architecture allows customers to use existing servers or workstations to transfer packages across the network.
- Real-time visibility of PCs allows for immediate inventory and remediation.
- BigFix offers strong endpoint protection security configuration assessment capabilities, as well as tight integration among various modules through the BigFix Platform.

Cautions

- Customers have to supplement BigFix solutions with third-party tools to conduct OS deployment/data and settings migration and application packaging, which may require additional resources to implement and manage.
- BigFix must make software distribution improvements to improve the flexibility of the way packages are configured and deployed.
- Organizations that are looking for intuitive, wizard-driven interface workflows can find the BigFix user interface (UI) to be challenging as operations are based on a scripting language in the BigFix product, though BigFix provides thousands of canned policies.

BMC Software

BMC BladeLogic Client Automation 8.0 (BCAC)

BMC released version 8.0 of BladeLogic Client Automation in May 2009. The most significant advancements in the product are a health-monitoring feature that alerts BCAC administrators to faults in the BCAC infrastructure, software title discovery, and integration with McAfee. We primarily see BCAC in large and highly distributed

customer environments, especially in retail. Its strengths are its bandwidth control, ability to manage users over Internet protocols, and policy-based management. We haven't seen many clients considering BMC over the last two years. This is at least partially due to BMC's focus on selling BCAC through the external service provider channel, and less to enterprise IT departments. BMC is trying to reinvigorate the Configuration Automation for Clients business by co-opting the BladeLogic brand, hence the new name of the product, BladeLogic Client Automation. Gartner believes that combining two incongruous terms (blade and client) is a confusing branding strategy, and the PC buyer is not likely to be impressed by the BladeLogic brand, which has server name recognition.

Strengths

- BCAC's Integration with Active Directory (AD) allows for real-time policy resolution, and allows users to assign policies to any container within AD.
- BCAC can be used very flexibly. It can perform the standard functions of PCCLM on Windows machines, but many organizations use it to manage nonstandard endpoints like automated teller machines (ATMs), point-of-service (POS) devices, video game cabinets, etc. We've also seen clients use it to perform functions outside of normal PCCLM, like data/file transport.
- BMC's market-leading service desk, Remedy, gives BMC substantial opportunities to upsell with BCAC.

Cautions

- Customers have to supplement BMC's solutions with third-party tools to conduct OS deployment/data and settings migration, as well as remote control, which may require additional resources to implement and manage.
- BMC is still in catch-up mode, and must continue to add new capabilities to meet emerging customer requirements — for example, broader endpoint security management than the McAfee support in the product today.
- BMC no longer has a strong brand in the PCCLM market.

CA

IT Client Manager (ITCM) r12

CA's PCCLM tool is ITCM. We mainly see ITCM used where CA is a strategic vendor for the customer, and where a large number of other CA products are purchased. CA has offered a unified architecture for PCCLM, asset management, and service desk since r11 (the predecessor to r12, the current version). The PCCLM functional strength of CA lies in its desktop migration product, which helps automate many of the migration functions that are managed manually or through complicated scripts. We saw ITCM slightly more frequently in 2009 than we did in 2008 in our client discussions, but CA's visibility in this market is low. CA has been late to market in several areas (for example, application virtualization and integrating endpoint protection with ITCM), indicating less focus on the PCCLM market than most competitors.

Strengths

- Desktop Migration Manager offers extensive PC migration capabilities — an area on which most competitors haven't focused. CA provides more automation in this area, which can help organizations that are struggling with manual processes or script-based approaches that may not be working well.
- The unified architecture of r12 allows functions like PCCLM, asset management, and service desk to function from a common inventory.

Cautions

- CA's visibility in the PCCLM market is low. ITCM was one of the least considered PCCLM tools among Gartner clients in 2009.
- CA's focus on PCCLM is not as strong as the other vendors in the market. For example, CA has added application support for VMware ThinApp and Microsoft Application Virtualization (App-V), but is not selling or acting as an OEM for any application virtualization product to help drive additional efficiencies and value for customers' PCCLM investments. Additionally, CA is still at an early stage in integrating ITCM with the company's endpoint protection and security configuration assessment technologies.

FrontRange Solutions

enteo version 6.2

FrontRange Solutions entered the PCCLM market in 2007 with the acquisition of enteo Software, a German-based PCCLM vendor; most of FrontRange's PCCLM customers are in Europe. FrontRange has a strong service desk that sometimes leads customers to consider the enteo suite. We typically see enteo considered by organizations with 500 to 2,000 seats where the same support staff is often using service desk and PCCLM tools for desktop support. The product is designed to be easy to use, and to be usable by administrators who may not have deep technical expertise or the time to write custom scripts and code. In 2008, FrontRange purchased Centennial Software to strengthen FrontRange's discovery, usage and asset management capabilities. While FrontRange/enteo's visibility within Gartner's client base improved slightly from 2008, we still do not see FrontRange nearly as often as several other vendors in the PCCLM market. Additionally, FrontRange must catch up to competitors in endpoint security, and in emerging requirements like power management, Mac support and mobile device management.

Strengths

- FrontRange offers an intuitive UI with granular, role-based administration.
- The product is easy to use. Operations are wizard-driven, and the solution comes with canned scripts. This tool is appropriate for organizations with administrators who lack deep technical expertise.

- FrontRange has strong service desk and basic asset management capabilities. These, along with enteo, comprise a suite of tools that can appeal to IT support organizations looking for all three capabilities from a single vendor.

Cautions

- Gartner has not seen substantial uptake of the enteo products in the U.S., nor have we seen many channel partners selling it.
- FrontRange must strengthen its endpoint security capabilities (e.g., endpoint protection, application control, and security configuration assessment), as the convergence between security and operations is happening more quickly in their target market.
- Software distribution and patch management are capable, but lack some increasingly requested capability, such as providing patch content for non-Microsoft content (e.g., Firefox, Adobe, etc.) and using PCs as peer distribution points.

HP

Client Automation version 7.5

HP released version 7.5 of Client Automation in June 2009. The most significant additions to 7.5 were integration with VMware ThinApp and security and compliance management capabilities, which allows users to perform security configuration assessments and manage endpoint security tools through Client Automation. We primarily see HP Client Automation in large organizations, as it is most often chosen for its scalability, bandwidth control, and policy-based management. HP has many of the most impressive references, which consist of several organizations that are managing very large environments (50,000-plus PCs) with low staffing levels and high deployment success rates. HP's prevalence on Gartner client calls is down from 2008, and HP must reinvigorate its brand in the PCCLM market.

Strengths

- HP Client Automation stores its policies within AD, which enables more-accurate targeting of configuration policy and faster enforcement. The policy-based management style that Client Automation uses positions it well for organizations that need to maintain a desired configuration for security, compliance, or operational reasons.
- Client Automation is very scalable. For example, customers report that it's easier to add management servers to the infrastructure to improve load balancing than it is with competitive products. Also, when clients authenticate to the management server, they authenticate to the satellite server, rather than going across the network to the core server.
- HP Software has two substantial internal channels through which to sell Client Automation: the Personal Systems Group (PSG) and the HP Enterprise Services (formerly EDS).

Cautions

- Role-based access control is not nearly as granular as it needs to be to support the requirements of large enterprises. HP needs to provide more capability to separate functional roles (e.g., patch, OS deployment), as well as scope (location, business unit, etc.).
- HP no longer has a well-known brand in the PCCLM market.
- HP's patching provides content only for the Microsoft OS and applications.

KACE

KBOX 1200 and KBOX 2200

KACE is the only vendor in the market that sells appliance-based PCCLM tools. The KBOX 2200 is the company's OS deployment appliance, and KBOX 1200 performs ongoing client system management. Both models are available as physical and virtual appliances. KACE started appearing on our client calls in 2007, and its visibility in the market has steadily increased over the last two years. KACE targets organizations that are staffed with IT generalists, that is, people who do not have deep expertise in particular IT domains. These are usually small to midsize organizations, generally in the 200 to 2,000 end-user segment. We have started to see KACE in larger organizations of up to about 10,000 PCs, especially when the customer has an IT profile similar to that of a midsize organization (i.e., low staffing levels that lack deep technical expertise). KACE is particularly strong in education because there is often a sizable Mac estate (a platform that KACE has focused on) and a need for an easy-to-use tool. Because KACE arrived later in this market than its competitors, it must balance catch-up priorities with innovation. For example, KACE must provide more out-of-the-box reports and language support, and must show differentiation with its unique capabilities, such as the application virtualization product and Mac support.

Strengths

- While the average KACE reference was smaller than those of competitive vendors, these references reported faster implementation times than all other competitors. A total of 79% of KACE's references reported that they had the product deployed (which we define as using it for inventory, patch management, software distribution, and OS deployment for at least 75% of the organization's environment) in less than six months. More than half of the PCCLM Magic Quadrant references for all vendors reported that it took longer than six months to deploy their products.
- KACE references reported lower utilization of implementation services (which we defined as planning, deployment, training, and other) than all other competitors. A total of 14% reported that they purchased deployment consulting services (the average for the market was 55%), and 35 % of references reported that they purchased no services at all (the average for the market was 11%, meaning 89% of PCCLM references purchased at least one service).

- Mac capabilities are strong, and are almost on par with Windows support.
- KACE's newly released Virtual Containers technology positions the company to help organizations manage their PCs as composite workspaces in the future.

Cautions

- KACE has improved the scalability of its products, but we still don't see the KBOX products used in very large environments (i.e., more than 20,000 seats).
- The KBOX has about 80 canned reports, but many organizations have reported the need to create additional reports, which is a time-consuming task.
- KACE doesn't offer a software recognition catalog to help correctly identify discovered software and to associate and rationalize discovered software titles.
- While KACE has a service desk and some endpoint security capability, it's behind some major competitors in these adjacent spaces that offer enterprise-class functionality.

Matrix42

Empirum 12

Matrix42 is a German-based software company; Empirum is its PCCLM tool. The company recently merged with update4U Software, which provides a service desk, asset management, and service catalog functionality. Gartner typically sees Matrix42 in environments with about 1,000 to 3,000 PCs. Empirum has good OS deployment (hardware-independent imaging) and software distribution functionality, and offered its tools at a lower price point than many competitors in 2009. The vast majority of Matrix42's business comes from Germany; the company has very little presence in the U.S., and Gartner is not aware of any Matrix42 customers outside Europe and the U.S. The integration of the Empirum and update4U into a broader IT service management portfolio will help Matrix42 compete with other PCCLM vendors targeting the midmarket, but the company will have to establish proof points that it has strong capabilities in the service desk and asset management spaces to make this combined offering viable.

Strengths

- Empirum has unique features for controlling and coordinating the release of software and patches to PCs — for example, the Rollout Coordination feature in Empirum provides a real-time view of software distribution activity.
- Matrix42 has offered hardware-independent imaging capabilities through the use of its driver library for several years.
- The Empirum product is usable for small organizations that are understaffed. Gartner spoke with several organizations that had low staffing levels yet were still able to successfully install and use the tool to improve automation.

Cautions

- We did not see Matrix42 very often among Gartner clients making product decisions, and Web hits for the company name on gartner.com are low.
- Matrix42 has been late to market with emerging requirements. For example, in Empirum 12, inventory capabilities were added for VMware ThinApp and for Mac clients.
- Empirum does not provide the quantity of out-of-the-box reports that several competitors provide.

Microsoft

ConfigMgr R2

ConfigMgr has the largest installed base in the market, due mainly to Microsoft's licensing strategy of including it in the core and enterprise client access license bundles. Microsoft's strengths in the PCCLM market lie in its ability to offer a single-vendor approach to the client platform and its management. Additionally, the troubled global economy has led more organizations to switch to ConfigMgr, especially if they have a Microsoft Enterprise Agreement, to save money on license costs. From a product standpoint, the greatest strength Microsoft offers is its ownership of App-V (Microsoft's application virtualization tool) and ConfigMgr's integration with it since the release of ConfigMgr R2 and App-V 4.5. Microsoft ConfigMgr customers tend to have higher staffing levels to manage the infrastructure and to build functionality that doesn't exist in the product natively, evidenced by staffing data collected in August 2009 and confirmed by other customers.

Strengths

- Microsoft's ownership of the de facto enterprise client OS allows it to offer a single-vendor approach for the client platform and its management, which is useful particularly from an account management standpoint.
- Microsoft's licensing strategy with ConfigMgr has led to its broad adoption. This means that organizations looking to hire desktop management personnel are more likely to find people with ConfigMgr skills than for competitive products.
- Microsoft's App-V tool is seeing wide adoption. This led to a cross-pollination situation where ConfigMgr is driving App-V adoption, and vice versa, because of the integration of the two products.

Cautions

- ConfigMgr customers usually have higher staffing levels, so the low acquisition cost of the product is often, at least partially, offset by the staffing requirements.

- Customers that have experience with ConfigMgr and some competitive products often report that they are less capable of managing their PCs in real time (e.g., instant inventory, patch or software deployment) with ConfigMgr.
- The Asset Intelligence feature needs improvement. Many clients reported difficulties in getting it to work, and the references Gartner spoke with stated that they weren't using this feature. Software usage monitoring is one of the most common areas where ConfigMgr customers use third-party tools to supplement the ConfigMgr inventory data.
- Organizations that need to automate patching for some non-Microsoft applications or OSs must use third-party solutions to achieve this.

Novell

ZENworks 10 Configuration Management SP2 (ZCM)

Novell released ZCM SP2 in May 2009. What primarily makes ZCM distinct from past versions of ZENworks is its independence from eDirectory; ZCM can now run in a Windows/AD environment. Novell also made some other improvements around usability and scale. ZENworks' biggest technical strength is its ability to deploy policies and applications to users and machines to understand and differentiate the needs between these two targets. When users receive new hardware or roam among machines, their applications can follow them because they are associated with the user's ID, not the machine. Few other tools can do this. Novell has not been attracting many new ZENworks customers; most of the company's focus has been on upgrading existing customers to ZCM. Some of Novell's smaller environments have migrated completely to ZCM, but we're still seeing slow uptake of ZCM overall.

Strengths

- ZENworks is a policy-driven management tool, which should position it well, especially for desktop operations groups that need to maintain a standard configuration for compliance purposes, or are taking on additional security responsibilities.
- ZENworks is one of the few products in the market that has the ability to deploy applications to users or machines.
- The product also offers sophisticated software distribution capabilities, and allows for very granular targeting and flexible options for configuring complicated software installations.

Cautions

- We have not seen many new Novell ZENworks customers that were not also longtime Novell customers, and the vast majority of customers are longtime ZENworks users.
- More than 70% of ZENworks' revenue is from maintenance; 30% comes from new licenses.

- Novell's primary focus over the last three years has been to port ZENworks' existing functionality to environments with multiplatform server, directory, and database environments. This has led Novell to lag behind in areas like security configuration assessment, power management, and Mac support.

Symantec

Altiris Client Management Suite (CMS), version 7

Symantec released version 7 of Altiris CMS in March 2009. This release was planned by Altiris for 4Q07, but was delayed by the Symantec acquisition. Symantec's CMS version 6 customers have been slow to adopt version 7 due to issues related to bugs and missing functionality, but we started to see deployments to version 7 in October 2009. There are two important advances in version 7. The first is the Symantec Management Platform, which is the foundation that Symantec plans to use to integrate CMS, its endpoint security tools, and its PC backup products. The second advance is a new software catalog that promises to improve software discovery and identification, as well as identify application dependencies. Version 7 is still unproved, and it will take time before various customer issues get worked out. The Altiris brand is still one of the strongest in the PCCLM market, and CMS was one of the most frequently considered products among Gartner clients in 2009. The Altiris product is complex, and successful deployments typically require high levels of investment in time and resources in both implementation and training. While the product is complicated, it also has strong capabilities. There are two major unknowns that Symantec needs to demonstrate. It needs to show that implementing the product has really improved with CMS; this has been an issue with prior versions of CMS, particularly in the midmarket, which is less likely to have the resources to implement the tool. More importantly, Symantec needs to demonstrate that IT operations management is really strategic to the company, as its mission is focused on the management and security of information, and past IT operations management acquisitions have led to mixed success.

Strengths

- Functionality is deep in the areas of software distribution, inventory, and OS deployment, and CMS provides a comprehensive set of canned reports.
- The software catalog offers potential technical differentiation in the area of software asset management and distribution.
- Symantec SVS (the application virtualization tool) is offered as part of CMS, and has tight integration with the CMS console. Additionally, while organizations are not adopting application streaming in large numbers today, the ownership of application streaming technology (not part of CMS) positions Symantec well to offer this capability as customers start to consider this software delivery method in the future.

Cautions

- The integration between Symantec Endpoint Protection and CMS is still at an adolescent stage, and Symantec has not yet established a distinct technical advantage with this integration.
- While the goals of CMS version 7 were to improve ease of implementation and management, customers have not yet reported improvements in these areas.

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.

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 and skills, 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 to 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 Web site, 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.