

Magic Quadrant for PC Configuration Life Cycle Management, 2006

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Organizations continue to work toward automating PC management from deployment to disposal, but immature processes and complexity are still the biggest inhibitors to adoption, not the technology. Most organizations are still focused on inventory, software distribution and patch management.

WHAT YOU NEED TO KNOW

Clients should make PC life cycle management tool decisions based on the entire PC life cycle, augmenting automating inventory, software distribution and patch requirements to include operating system (OS) deployment, especially to prepare their environments for Microsoft Vista. Vendor/tool selection will go beyond patching to also include security configuration enforcement. Large vendors continue to force prices and margins down, so we expect further consolidation to occur within this market and from markets outside configuration management (for example, storage and security). Therefore, clients buying tools from smaller vendors should negotiate maintenance contracts, keeping in mind the possibility that they may be acquired.

MAGIC QUADRANT

Market Overview

The PC life cycle configuration management market still remains strong and is a major contributor to the overall configuration management market (greater than 85% of total revenue at \$1.6 billion for 2005). We still see that, for many enterprises, these tools remain cyclical – every three to four years, enterprises reassess their current tool against new functional requirements. This usually coincides with the rollout of a new Microsoft Windows OS, or in response to the exploitation of a security vulnerability. This scenario is most often seen in small and midsize businesses (SMBs), where the tools are used more tactically to solve an immediate problem, and not the more long-term problem of the PC configuration life cycle. Organizations that have problems implementing these tools seem to be struggling with complexity, looking for automation as the “fix” instead of putting policy and process ahead of automation. In speaking with Gartner clients and vendor references, we still see the predominant focus on inventory, software distribution and patch management, with a strong desire to be able to deploy new PCs with “zero touch,” but with very limited implementation of the complete PC life cycle process, including initial deployments.

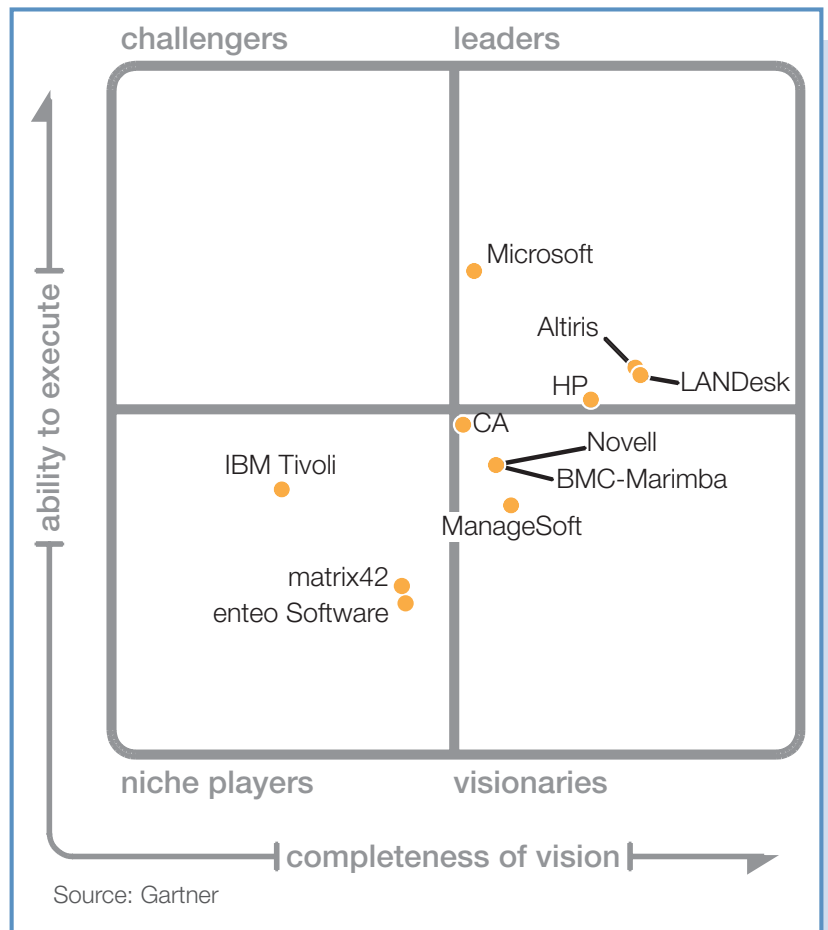
Some of Gartner's more mature clients that have tackled standardization across their desktops have been able to leverage some of the coveted policy-based management capability found in very few solutions. These organizations have established policies for PC configuration standards and are using these tools to enforce a desired state, which also facilitates software license compliance. Other tools offer varying capabilities to establish policies, but enforcement is more push- or task-based and requires more manual effort to ensure configuration compliance. Desired state tools offer a more continuous approach that acts as a system watchdog to the PC to locally, as well as centrally, enforce a configuration setting, file or application. Some of these mature clients have also been able to tackle the entire life cycle, managing initial deployment into the ongoing life cycle of a PC via a single console – again, only a limited number of solutions were used to do this.

Market Definition/Description

This is only the second year we are publishing the PC Life Cycle Configuration Management Magic Quadrant. Even though in previous PC Management Magic Quadrants, the main focus was software distribution because of its critical role in ensuring configuration consistency and persistence, other life cycle modules were taken into account (most notably, inventory). In the past few years, the needs and demands of the buyers continued to broaden as their role in managing the PC configuration broadened, and as new technologies and approaches emerged. Today, for large enterprises, we see the buyer looking for added capabilities for security enforcement and application licensing. Although SMB buyers also want these functions, SMBs continue to prefer one-stop-shopping for as many functions as possible. SMBs often look to see whether there is tight integration with these tools and their service desk and asset management solutions. Whereas large enterprises have separate buyers for service desk and IT asset management, and although the need for integration is there, the requirement between the two buyers is not always brought together.

Because this is a mature market, we see little differentiation in the base functions (software distribution and inventory), but how they deliver the complete life cycle solution (with their own complete suite or through partners and integration) continues to be a

Figure 1. 2006 PC Life Cycle Configuration Management Magic Quadrant



differentiation. The vendors' positions have spread out from last year, largely due to execution on vision year over year, acquisitions made, and strategy for new capability and focus to ensure that clients can implement a full configuration life cycle.

Inclusion and Exclusion Criteria

Several requirements exist for inclusion on this MQ. We wanted to evaluate the progression of how vendors have helped clients move to a more-comprehensive PC life cycle configuration management strategy. We required that the solution include modules for inventory/discovery, software distribution, patch management, OS deployment and at least three of the following other features: data/settings migration, software packaging with conflict resolution,

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software license usage (metering), remote control, client PC backup, security configuration management with security context, and disposal (data overwrite). We required examples of integration and use of these modules reflected by the vendors' references. We also required a minimum number of references for installed customers of specific sizes using current products to show that vendors were not specific to one customer segment (and could handle the broad array of organizations from small to large).

Not only were the number of references from some vendors insufficient to meet our criteria, but also those that did provide references had few mature implementations of the complete life cycle. Clearly, these vendors are selling solutions for managing PC configurations, but due to many factors (such as lack of maturity in processes, lack of standardized desktop configurations, lack of staffing as well as, in some cases, vendor products that were not meeting customers' needs for PC life cycle configuration), the solutions were too complex to implement, or the tools just didn't do what the vendor claimed they could. Some vendors could not come up with the necessary references.

Our criteria for inclusion in 2006 are as follows:

- Vendors must offer life cycle management (including PC deployment) to support environments of fewer than 5,000 and more than 35,000 users, as demonstrated by customer references.
- Products must be in production in the preceding 12 months (September 2005 through August 2006).
- The vendor must generate client interest and inquiry sufficient to be noticed by Gartner analysts. Analysts must also receive feedback from clients indicating that they are using the products.
- The company demonstrates competitive presence and sales to Gartner analysts.

Added

None

Dropped

Symantec has had an on-again, off-again presence in this market. In the late 1990s, the company sold its DeskTop Administrator suite to HP (which was discontinued in later years) and re-entered this market with its purchase of ON Technology in 2004. Since that time, the vendor struggled to decide how strategic the product was, and how to integrate or leverage it with its much larger security and storage businesses. In the past few months, Symantec all but disappeared from sight. Two years after the acquisition, it still does not have any security configuration management capability, which would be the natural and obvious path for the technology in Symantec. We have not seen Symantec's PC life cycle configuration solutions on client's shortlists, yet it claims it's continuing to sell to installed customers and plans to re-emerge in 2007 with an updated product. We remain skeptical that Symantec's

management technologies will demonstrate its importance to the company and gain traction against the much-larger security and storage businesses. We believe the technology is viable and should be absorbed by the security business, and repositioned as a security configuration management and compliance product.

Evaluation Criteria

Ability to Execute

This is the company's financial position and stability, and the vendor's ability to market and sell its products. This is not a rating of how well or how poorly customers are able to implement or execute the product. A company that captures 100% of a market with a product that does not work well would be very high in its execution rating and very low (far left) in its vision rating. That said, we are taking a decidedly harsh look at vendors' ability to execute. Vendors making shortlists is a major contributor to their ability to execute criteria. There are several factors contributing to which companies make shortlists. With Microsoft dominating this market, with Systems Management Server (SMS) holding nearly 50% of the installed base and its continued success in selling enterprise agreements that include SMS, it is often difficult for competitors to rival those accounts, even if their solutions are technically better. In contrast, vendors that have had a long-standing market share presence, and also have traditionally sold their solutions as part of a larger deal or as part of a strategic partnership, are making fewer shortlists because they fall short of many of the life cycle requirements demanded by clients. Additionally, prices have stabilized, albeit at a lower level than they were at even a few years ago. Therefore, shortlists continue to get shorter due to Microsoft's strong play in brand and price hardening, with many vendors having trouble getting on shortlists for closer evaluation (see Table 1).

Completeness of Vision

We evaluated completeness of vision by looking at product capabilities and visionary features for managing the complete life cycle of desktop configuration. We rated all the products based on the features and functions they include, along with their level of integration with third-party products, to provide customers with

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product/Service	high
Overall Viability (Business Unit, Financial, Strategy, Organization)	low
Sales Execution/Pricing	standard
Market Responsiveness and Track Record	standard
Marketing Execution	no rating
Customer Experience	high
Operations	standard
Source: Gartner	

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	standard
Marketing Strategy	standard
Sales Strategy	standard
Offering (Product) Strategy	high
Business Model	standard
Vertical/Industry Strategy	standard
Innovation	standard
Geographic Strategy	standard
Source: Gartner	

broader options, or to fill in functionality gaps not developed and owned by the vendor. Visionary qualities continue to help set the players apart. This year, security configuration management continues to play a prominent role – including quarantining, blacklisting, antivirus, and security configuration templates used to enforce settings and services for regulatory compliance with NIST, CSA and CIS. Application streaming and virtualization are also becoming features of interest to our clients. We are seeing vendors add functionality organically and through acquisitions. Vision ratings are heavily influenced by what our clients tell us about the vendors. Vendors that do not appear on shortlists will receive lower scores in areas such as marketing and sales strategy, and will be more likely to appear toward the left of the quadrant.

Leaders

Although there are leaders in this year's Magic Quadrant, it is important to understand what has made this change occur. This year's leaders have moved for three reasons:

- Attention on vision for what clients will need next for managing the life cycle (for example, broader security functionality)
- Focus on application streaming or virtualization
- Continued visibility and success in a more-crowded and competitive market

A leader's ability to execute will be proved by its high market share and its appearance on numerous shortlists. That ability is bolstered by industry-leading overall fiscal health, broad geographic presence and a superior track record for market responsiveness and customer service. A leader will have vision scores that reflect feature-complete products, and show leadership in providing some life cycle management functions that users have just started requesting. Often, leaders are innovative in adding functions not yet being requested, but add capability to enhance the PC life cycle configuration experience.

Challengers

Challengers are defined by a keen ability to execute, but with products that lack complete functionality compared with competitors and few features that are seen 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. That ability is bolstered by industry-leading overall fiscal health and broad geographic presence, but they are followers with superior marketing and sales execution. They reach their market positions in terms of share and frequency of presence on shortlists because they price very aggressively, bundle products with others or even give them away for free.

Visionaries

Visionaries in this market will have vision scores that reflect feature-complete products, or show leadership in providing some life cycle management functions that users have just started requesting or are not yet requesting. A visionary appears on shortlists because it offers a complete solution and a larger story for multiple adjacent management needs (for example, network management, service desk, security configuration management, server management, handheld management, application virtualization or asset management). However, its ability to execute is hampered by its size/stature or focus. Its sales force may be smaller or very large, but it concentrates less on this particular product.

Niche Players

We remind readers that niche products can be very good choices. Niche products generally provide less of the function, or cover smaller geographies than the other players, or come from very small vendors that have a hard time getting on a broad set of client shortlists. Niche players also may not have products in important tangential or visionary areas, such as network management, service desk, security configuration management, server management, handheld management, application virtualization or asset management. For a large vendor with a good ability to execute overall, sales in this market may be tied to other products, or the vendor may take aggressive pricing actions; its product does not get sold or make shortlists based on its own merits. Organizations that are looking for products with certain strengths or in certain geographies may find that a niche vendor's products offer good capability and support.

Not on This Magic Quadrant

There are other products for managing the various aspects of the life cycle of a PC's configuration. We have excluded them from this Magic Quadrant because they do not have enough references from large customers (at least three with more than 35,000 seats). These vendors offer some or all functions for PC life cycle management, but are limited in their ability to execute in reach (channels, sales and so on), brand awareness (reflected in inclusion on shortlists without a specific sales contact) or scalability. Some of those include BigFix, ScriptLogic, OnDemand Software (recently acquired by AttachmateWRQ), LSVi and New Boundary Technologies. These vendors can also be viable choices for organizations that find value in ease of use or specific features and don't need the proven scalability of the players on the Magic Quadrant.

Vendor Comments

Altiris

Altiris continues to show up on client shortlists, second only to Microsoft. Altiris is doing well, especially in companies of between 3,000 and 10,000 users. It needs to continue to improve integration among its various components, and must continue to differentiate its product and offer unique value. Its stock has been up and down a bit for a variety of reasons (shift in channels, sales expectations, excitement over its Software Virtualization Services and so on) and general market dynamics, but has recently stabilized. Altiris offers a comprehensive life cycle configuration management suite as well as adjacent offerings that complement it for service desk, asset management, storage/backup and additional security vulnerability management. Altiris has also successfully addressed its loss of HP as its largest reseller. In 2000, HP contributed more than 50% of Altiris' revenue. Currently, the HP contribution is approximately 10%.

BMC-Marimba

BMC continues to offer the Marimba solution, Configuration Manager for Desktops, and takes a product integration approach to offer a complete PC configuration life cycle solution (versus owning or building all the technology). Like last year, we have not seen this solution on new customer shortlists (since the acquisition). Some issues still exist for clients regarding the level of support they were once accustomed to when Marimba was an independent company. We expect that BMC will continue to sell this solution to its existing installed base, especially for its Remedy IT service management suite and its configuration management database (CMDB), Atrium, as a means of populating these products with discovery data. There have been only basic maintenance enhancements for desktop configuration management, but BMC has added a closed loop workflow to tie this tool to its change management tool for audit validation of configuration changes. We expect more integration of this solution in the area of discovery to other discovery products that BMC offers (for example, agentless and dependency discovery), but much of this will be targeted at data center servers.

CA

CA has been improving its position on the Magic Quadrant in past years in completeness of vision. Although its overall focus includes large enterprises, lately, CA has been more popular for midsize organizations looking for a single vendor that can provide solutions for configuration management, asset management, service desk and network management. CA added a PC migration function in 2005 and can integrate with third-party imaging products. Its patch management capability is still new compared with other vendors in this market, and we often see its customers supplement CA Unicenter Software Delivery (USD) and Unicenter Asset Manager (UAM) with a stand-alone patch management point solution with stronger discovery that is more oriented toward patch discovery for patch prerequisite/co-requisite analysis. CA's R11 platform has brought tighter integration between USD and UAM, which previously shared a common graphical user interface and now have a single architecture (for example, database, install and agent). Not unlike other large vendors, this solution is being sold as a more-comprehensive marketing story where clients are

looking for integration between desktop configuration and IT service desk and IT asset management. SMB clients will want to continue to add them to lists, but must insist on references that match their specific infrastructure requirements as part of the evaluation process.

enteo Software

enteo software, a small, privately held company, sells its products primarily to SMBs (500 to 5,000 clients), although it can scale, as proved through references, to support environments of more than 35,000. The strength in this solution is its ease of use and packaging for policy-based automation. Additionally, enteo's life cycle configuration suite, enteo v6, should also be evaluated for scenarios that have "bandwidth challenges" to remote sites, and where managing fat clients and Citrix deployments is required. Because its primary geography is Germany, language translation (aside from English) for other geographies should be verified. enteo continues to be challenged by lack of visibility, especially outside Europe. It continues to expand its presence in the U.S. through a growing list of resellers. Gartner continues to see few organizations putting enteo on their shortlists. enteo has a complete life cycle management solution, but lacks presence in tangential and visionary areas, such as service desk, application virtualization and security configuration management.

HP

During the past year, HP's OpenView Configuration Manager (OV CM) for Desktops (aka Radia) has resurfaced. HP is finally devoting the resources to help sell this solution. This solution still offers the robust desired-state configuration capability for enforcing configuration standards. With a comprehensive suite, OV CM is still a strong solution for large enterprises, with the majority of customers being longtime users for scalable implementations. Now that this solution is re-emerging on shortlists, we expect HP to put the missing attention back on development in the area of security configuration. This solution used to lead the market in capability and is now even on most functions, but needs to add more focus on security compliance as well as an offering for virtualization or streaming, which customers and potential buyers may need in the future.

Last year, HP introduced an easier-to-use Radia-based suite targeted to SMBs, but it was missing functions for the complete PC life cycle. Recently, HP announced an updated version that offers not only the complete life cycle functions (for example, deployment), but also the addition of missing capability for hardware management. Although this solution is not evaluated in this Magic Quadrant because it is only targeted to SMBs, we expect this new version of OpenView CCM (along with OpenView CM for desktops) to be sold throughout HP's various sales channels (in lieu of Altiris). HP OV CM for desktops (aka Radia), along with its sister product for servers (OV CM for Servers), will also play a key role for CMDB discovery along with the soon-to-be acquired discovery from Mercury's Application Manager, and the previously acquired Enterprise Discovery from Peregrine. Tying OV CM to these products as well as Service Center's change management capability can be a compelling story for desired state management.

IBM Tivoli

IBM has added functionality at a slower pace than the market (for example, adding patch in 2005). IBM's recent acquisition of Rembo will provide it with good technology to enable the PC deployment part of life cycle configuration management that customers are asking for. During the past few years, we have seen fewer new implementations of Tivoli Configuration Manager (TCM) because it is hampered by framework requirements, thus limiting its ability to execute. Consequently, IBM is in the Niche Players quadrant. In 2006, IBM also shipped its Express product, an easier-to-use software distribution product targeted at SMBs. However, it does not provide complete life cycle management functions or a migration path to its new enterprise product, Tivoli Provisioning Manager for Software.

IBM has been shifting its attention away from TCM toward Tivoli Provisioning Manager (TPM). TPM is a nonframeworked product that IBM has been selling for server management for the past two years. IBM will ship a version of TPM targeted at PCs in the fourth quarter of 2006 (TPM for Software), but that product is not eligible for consideration in this Magic Quadrant because it did not exist during the period covered and has no references to date. TPM for Software promises to address some of the shortcomings of TCM in the PC life cycle management market, but based on where IBM is today and where it needs to be, the vision is really one of trying to catch up with competitors. Users currently beginning evaluations should consider Tivoli TPM for Software when it is available or consider alternatives, but recognize that TPM references will be crucial because it will be a version 1 desktop product in a mature market.

LANDesk

LANDesk was acquired by Avocent in 2006, historically known for KVM switches, Intelligent Platform Management Interface and other infrastructure management functions. The acquisition was driven by Avocent's desire to invest in a software area with some additional growth possibilities, and to move further into the mainstream of IT management technologies. LANDesk allows Avocent to have a presence in the desktop market, and extends its buyer to new management requirements. Avocent may push LANDesk to enhance its server management capabilities to leverage Avocent's traditional data center customer base. However, so far, LANDesk has not been distracted from its traditional focus areas, and continues to predominantly provide a broad and comprehensive set of life cycle management functions.

LANDesk's demonstrates its vision as it continues to strengthen its security offerings beyond patching to include blacklisting, quarantining and antivirus. It's also added helpful best-practice templates to assist organizations with their configuration

Note 1 Note on Vendors

PC life cycle configuration management vendors continue to broaden their offerings by adding more security administration tasks, integration to service desk and asset management, and are beginning to keep an eye on future virtualization/streaming needs.

Source: Gartner

management process workflows from its process management acquisition. LANDesk remains a strong player for companies with 500 to 10,000 users as an easy-to-deploy and easy-to-use product choice.

matrix42

matrix42 is a small, privately held German company that sells its Empirum product predominantly in Europe. matrix42's expansion strategy is focused on less-saturated markets, such as South America, the Middle East and Africa, and Southeast Asia, where competition is less significant and business is less likely to involve replacements of existing solutions. Empirum is a broad life cycle suite that is easy to implement and use, and includes strong policy-based management capabilities. Like other smaller vendors, matrix42 is challenged by competitors with stronger brand-awareness, especially in the U.S. Although matrix42 has made some progress in landing a major U.S. service provider in 2006, it still struggles to appear on client inquiry shortlists. It remains a niche player due to its relatively small presence outside Germany. Although it has a complete life cycle management solution, it lacks presence in tangential and visionary areas, such as service desk, application virtualization and security configuration management.

ManageSoft

ManageSoft's products continue to compare favorably with other vendors in the market, and as a smaller, private company, it appears on a reasonable number of shortlists and has a reputation for ease of use and reduced server requirements. Its life cycle suite can be supported by a "light" infrastructure, in which PCs are used as distribution points for offices with no servers. It also has strong inventory and reporting capabilities, which it markets as IT Business Intelligence. ManageSoft has focused on security and compliance, having developed its own advanced functions for security configuration management, and recently added an asset management repository and license management capabilities. ManageSoft continues to be challenged by a lack of visibility in this market, especially in Europe, as it competes with several very large companies.

Vendors Added or Dropped

PC life cycle configuration management vendors continue to broaden their offerings by adding more security administration tasks, integration to service desk and asset management, and are beginning to keep an eye on future virtualization/streaming needs.

Source: Gartner

Acronym Key and Glossary Terms

CMDB	configuration management database
OS	operating system
OV CM	OpenView Configuration Manager
SMB	small and midsize business
SMS	Systems Management Server
TCM	Tivoli Configuration Manager
TPM	Tivoli Provisioning Manager
UAM	Unicenter Asset Manager
USD	Unicenter Software Delivery

Microsoft

Since our last Magic Quadrant, Microsoft has made several acquisitions (Softricity, AssetMetrix and WinTernals) that shows it is not only shoring up its existing product compared with the competition, but also is preparing to change the way organizations deploy software by addressing application virtualization and streaming, more-accurate asset discovery, and recovery, respectively. The AssetMetrix software knowledge base will be offered for free. SMS 2003 accomplishes life cycle functions through add-ons such as its OS deployment feature pack, which could be more automated, and its Solution Accelerator for Business Desktop Deployment, which is targeted at improving time to implementation, but requires a lot of scripting expertise. Microsoft's vision for the next version of SMS (due 3Q07; 0.7 probability) will focus on desired-state reporting and PC deployment/migration. Although the new features should bring Microsoft at least up to parity in life cycle management functions, customers need to wait to see how well the product will work. However, it appears to be headed in the right direction. By acquiring Softricity, Microsoft has validated application virtualization and streaming as a way to deploy and run software. Although SoftGrid can be integrated with SMS, it will be sold as part of the Software Assurance Desktop Optimization Pack for Windows client.

Novell

Novell continues to have a quality product, but often gets penalized in product evaluations for "perception" reasons relating to Novell the company versus ZENworks. Many organizations are still reluctant to bring in Novell products and the eDirectory that ZENworks requires, even though it can run in a Windows environment. Novell continues to ship new versions that add new and acquired functions (such as the 2005 acquisition of Tally Systems for improved discovery and asset license compliance), but full integration is not yet complete. Today, the integration is primarily in the user interface and data is not shared in a single repository. Novell's integration of imaging and migration functions, and its policy-based management capabilities, positions it well for life cycle management.

In 2007, Novell will ship the next version of ZENworks, which will not require eDirectory (0.7 probability), but which will enable Novell to improve its position in non-eDirectory environments. Other significant enhancements will be a more-streamlined agent and the integration of Tally Discovery with ZENWorks into a single repository. Novell will still be challenged with this product to get on shortlists beyond its Novell installed base, because Novell's marketing efforts have not been as focused on the ZENWorks brand specifically, but more focused on the identity management and Linux products.

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, etc., 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 of the individual business unit to continue investing in the product, to continue offering the product and to advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all pre-sales activities and the structure that supports them. This includes deal management, pricing and negotiation, pre-sales 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 in order 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, 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, etc.

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 Web site, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling product 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 set 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 verticals.

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.