

# Enterprise Service Management – Software

A report assessing ESM software vendors  
focused on optimizing enterprise operations



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The enterprise service management (ESM) software market has evolved significantly over the past half a decade. As industry dynamics change with the latest technology developments, offerings are becoming more streamlined, simplified and connected with diverse applications. This decade is marked by increased AI usage (Agentic and Generative AI) in workflows to boost the experience and value for all stakeholders. M&As are at a peak to accelerate time to value and experience. Initially focused on ITSM, ESM now encompasses various business and corporate functions to create a unified service experience across organizations. The ESM approach will increase the demand for solutions that support remote and hybrid work environments, driving ESM platforms to adopt and manage distributed workforces effectively. There is a growing emphasis on improving intuitive interfaces, personalized services and omnichannel support to enhance workforce productivity and customer satisfaction. The adoption of low-code/no-code tools has increased, enabling faster development and customization of

workflows. With the intensifying focus on data security and regulatory compliance, ESM platforms have incorporated robust security features and compliance management tools to meet global standards. ESM software vendors are developing industry-aligned intelligent solutions that cater to specific sector requirements, including compliance templates, regulatory automation and customizable workflows.

This assessment evaluates ESM platform/software vendors based on their capabilities in enterprise workflow coverage, workflow design and modeling, industry-focused solutions and UX. It also underscores the need for CloudOps maturity, focusing on multicloud and hybrid cloud support to ensure scalability, resilience and interoperability.



## ESM Software - 2025

### ENTERPRISE WORKFLOW MANAGEMENT

EXPERIENCE – ENGAGEMENT –  
EXPERTISE - PARTNERSHIP  
(Partnerships – User journeys –  
Investments)

GEN AI – AI – Automation – Cloud – LCNC  
(Strategy – Roadmap – Solution)

SECURITY - ESG – GRC  
(Sustainability – Risk – Agility – Resiliency)

KNOWLEDGE MGMT – TALENT MGMT  
– STAKEHOLDER MGMT  
(Operational Knowledge, Hybrid talent,  
SLA & KPI)

#### Enterprise Workflow Coverage

Business  
(CSM)

Corporate  
(Emp services)

IT  
(ITSM)

Portfolio wide support

#### Experience & Engagement (User: customer Journey)

Omni-channel support

UI customization

LCNC

Modernization - Customization - Personalization

#### Workflow Design & Modelling

Prebuilt connectors

Reporting & Analytics

Integration  
(ERP-CRM)

Business Rules & Functional Capabilities

#### Platform Solutions & Products (Solution Engineering)

Industry Focused

Certified / Co-branded

Agentic offerings

Innovation - Intelligence (Gen AI\*) - Automation



This report  
**assesses ESM  
software** vendors'  
capabilities  
in delivering  
**technology,  
organizational  
and business  
workflows.**

Simplified Illustration Source: ISG 2025

**Enterprise Service and  
Workflow Management  
Platforms**

**Definition**

**The ISG Provider Lens™ Enterprise Service Management study offers the following to business and IT decision-makers:**

- Transparency on the strengths and weaknesses of relevant providers.
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness.
- Focus on global market.

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.



## Enterprise Service and Workflow Management Platforms

### Definition

This quadrant evaluates software vendors that provide end-to-end enterprise workflow automation, integrating IT, business and customer-facing services. These platforms extend traditional ITSM into broader enterprise-wide automation, covering IT, HR, finance, procurement and customer service functions. The assessment focuses on vendors' capabilities to deliver comprehensive workflow and process automation that ensures seamless integration across enterprise applications. AI-powered service orchestration is crucial, leveraging GenAI, Agentic AI and predictive analytics to enhance intelligent automation, proactive issue resolution and self-learning workflows. Security, compliance and governance capabilities are essential, ensuring enterprise-grade security, regulatory compliance and built-in governance controls. Platforms must demonstrate cloud and infrastructure resilience by supporting hybrid and multicloud environment.

### Eligibility Criteria

- Enterprise workflow coverage and extensibility:** Capability to support ITSM, CSM, employee services and cross-functional business workflows. It must enable modular, composable workflows that integrate with enterprise applications.
- Advanced workflow design and modeling:** Competency in offering configurable business rules, dynamic decision automation, security and compliance features, and prebuilt integrations for enterprise-wide workflow optimization.
- AI-driven service automation and intelligence:** Ability to leverage GenAI, Agentic AI and ML-powered automation to improve decision-making, automate repetitive tasks and enable proactive issue resolution.
- Cloud-native and multicloud capabilities:** Expertise in delivering SaaS-based, support hybrid cloud and multicloud deployments, and provide CloudOps automation for scalability, security and operational resilience.
- Low-code/no-code development and workflow customization:** Proven record in offering intuitive, AI-assisted development tools for configuring workflow, automation and orchestration, with API-driven extensibility.
- Industry-specific adaptability:** Flexibility to provide industry-aligned solutions with compliance templates, regulatory automation and customizable workflows to meet sector-specific needs.
- User-centric experience and engagement:** Focus on creating intuitive UI/UX, omnichannel support, AI-driven personalization and collaboration tools that improve workforce productivity and customer satisfaction.



- 8. Security, compliance and governance:** Commitment to adhering to global security standards (**ISO 27001, SOC 2, GDPR, HIPAA**) and include built-in risk management and governance features.
- 9. Proven market presence and scalability:** Track record of successful enterprise-scale deployments, strong customer references and the ability to scale across geographies and industries.
- 10. Cloud-native, multicloud and FinOps readiness:** Preparedness to support multicloud, hybrid-cloud and SaaS-native, supporting CloudOps automation, cost optimization and real-time cloud observability.



## Quadrants by Region

As part of this ISG Provider Lens™ quadrant study, we are introducing the following one quadrant on Enterprise Service Management – Software 2025:

Quadrant	Global
Enterprise Service and Workflow Management Platforms	✓





The research phase falls in the period between March and July 2025, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in September 2025.

<b>Milestones</b>	<b>Beginning</b>	<b>End</b>
Survey Launch	March, 27 2025	
Survey Phase	March 28, 2025	April 23rd, 2025
Sneak Preview	July 2025	August 2025
Press Release & Publication	September 2025	

Collecting client testimonials via the Star of Excellence Program requires early client referrals (no official reference needed) because CX scores have a direct influence on the provider's position in the IPL quadrant and the awards.

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2025 research agenda.

#### **Access to Online Portal**

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

#### **Buyers Guide**

ISG Software Research, formerly “Ventana Research,” offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the Enterprise Service Management – Software IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2025. For more information, refer to the [Buyers Guide research schedule](#).

#### **Research Production Disclaimer:**

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.



### ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.”

The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:  
[star@cx.isg-one.com](mailto:star@cx.isg-one.com)



**ISG Star of Excellence**



## Methodology & Team

The ISG Provider Lens™ 2025 – Enterprise Service Management – Software research study analyzes the relevant software vendors/ service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

**Study Sponsor:**

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The research and analysis presented in this study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

All revenue references are in U.S. dollars (\$US) unless noted.



## Contacts For This Study

### Study Sponsor



Heiko  
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Global**



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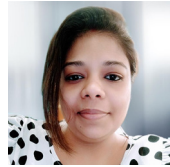
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Global**



### ISG Provider Lens™ Advisors Involvement Program

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

## ISG Advisor to this study



Bill  
Huber

**Partner, Digital  
Platforms and Solutions**



## Invited Companies

**If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.**

\* Rated in the 2023 iteration

4me*	HalolTSM*	Serviceware*
Agiloft	Hornbill	SoftExpert
Aisera	IBM (Control Desk)	SolarWinds*
Alemba (acq. By Volaris Group)*	IET Solutions (Unicom Global)	Spiceworks
Atera	IFS Assyst*	Symphony Summit AI*
Atlassian*	Invgate*	Sysaid*
Atomicwork	iSupport	TeamDynamix
BMC*	Ivanti*	Topdesk*
Broadcom*	Jitbit	USU
C2 Innovations	ManageEngine*	Vivantio
Combodo	Matrix 42 (Firescope)*	Zendesk
Datto	Micro Focus*	
EasyVista*	Motodata	
Efecte	NinjaOne	
Freshworks*	Serviceaide*	



## \*ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this [webpage](#).

## \*ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

For more information about ISG Research™ subscriptions, please email [contact@isg-one.com](mailto:contact@isg-one.com), call +1.203.454.3900, or visit [research.isg-one.com](http://research.isg-one.com).

## \*ISG

[ISG](#) (Nasdaq: [III](#)) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit [isg-one.com](http://isg-one.com).





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