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# Market Guide for Client Management Tools

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Client management tools are critical to manage PCs and Macs. Infrastructure and operations leaders must understand the long-term client and device management trends and the current market dynamics to select the appropriate vendor.

## Key Findings

- The client management tool market is mature, with most vendors providing only incremental enhancements to their tools.
- Factors that differentiate CMTs include security configuration and compliance management, server management, Mac management, unified endpoint management, ease of deployment and use, and scalability.
- Classic client management is shifting to enterprise mobility management, most notably with changes to Windows 10.

## Recommendations

- Identify your CMT and EMM requirements to determine whether you need best-of-breed functionality in both areas.
- Determine your server management requirements (provisioning, patching, application deployment, configuration management and so on) for the server platforms in your environment to decide whether CMTs are sufficient or if you need more focused server automation tools.
- Ensure that your patching and security configuration management capabilities sufficiently protect your organization, as most vulnerabilities have a known remediation mechanism, such as a patch or a configuration change.

## Market Definition

End-user computing and support organizations use client management tools (CMTs) to automate endpoint management tasks. CMTs perform the following technical functions:

- OS deployment
- Hardware and software inventory
- Software distribution
- Patch management
- Configuration management (e.g., scripts)
- Security configuration management
- Remote control

Organizations primarily use CMTs to manage Windows PCs. Enterprise mobility management (EMM) is still a separate market, but organizations increasingly look for a single vendor and management platform to support PCs, Macs and mobile devices.

## Market Direction

Client management automation is an important function for midsize and large organizations. The tools have matured and become more commoditized over the last five years. CMT solutions do, however, continue to see further evolution driven by the move away from legacy Windows system management toward the management of a user's digital workspace. The tools enterprises use to manage their PCs will increasingly be SaaS-based, cross-platform, and focused on managing a user's access to applications and data, rather than maintaining the desired state of the entire PC.

### Continued Decline of Windows Applications

The number of Windows applications in enterprises has been slowly declining for the last 10 years, replaced most often with browser-based, OS-neutral applications (see "The Decline of Windows Applications in Organizations Will Present Changes and Opportunities"). As locally installed Windows applications continue to decline in number, there will be fewer packages and scripts to manage, and less dependence on a carefully managed PC configuration. Endpoint engineers will increasingly focus on managing access to applications and protecting data, rather than managing the entire device configuration. This is a slow transition, however. We believe many organizations will have legacy management practices for the foreseeable future. They will support their legacy Windows applications while adopting new forms of endpoint management.

### Continuously Updated OS Platforms Lead to New Management Approaches

Client OS platforms are becoming evergreen services that are updated on an ongoing basis. Organizations need new management approaches to address the ongoing change (see "How to Deal With Windows 10 Accelerated Updates on PCs"). Endpoint administrators will increasingly manage their PCs the same way they manage smartphones and tablets. Apple began to transition Mac OSX toward the EMM model several years ago. Microsoft first introduced EMM APIs in 8.1 and has since made several changes to Windows 10, greatly enabling organizations to use EMM processes to manage Windows 10 systems.

## Client Management Tools as a Service

While CMTs are predominantly delivered on-premises, SaaS has gained modest interest as an alternative for several reasons:

- SaaS reduces some of the internal labor required to manage and use the tool, which has been a problem particularly for organizations that lack the necessary internal resources.
- Many organizations have users whose devices are difficult to manage because they are frequently off the network. SaaS provides an option to manage those users over the internet.
- OS platforms are being updated more rapidly, requiring CMTs to also update more frequently.
- The decline of Win32 applications in favor of mobile/cloud applications makes SaaS-client management a more technically viable option than it was in the past.

Several vendors are now offering SaaS editions of their product, but regulatory requirements and technical challenges continue to limit SaaS-based CMT to certain types of organizations or certain users within organizations.

## Three Waves to Unified Endpoint Management

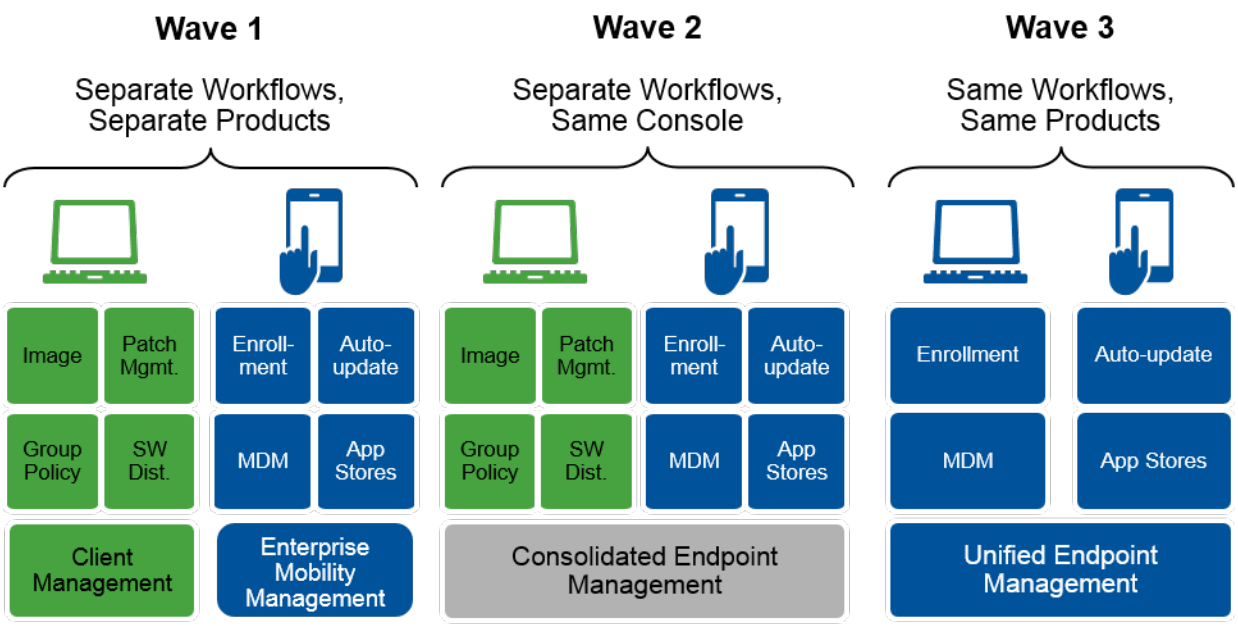
One might wonder why the enterprise mobility market ever existed as a stand-alone market, as managing mobile devices and PCs with the same tool makes perfect sense. There are two reasons that CMTs did not absorb EMM. First, mobile device platforms have different management architectures from Windows, which meant CMTs could not be "ported" over to manage mobile devices. Second, the CMT market matured in the 2007 to 2008 time frame, long before today's mobile devices became a concern for organizations. By the time today's smartphones and tablets entered the radar of IT organizations, the CMT vendors lacked the motivation or the capital to acquire the mobile device management (MDM) vendors that emerged in the early part of the decade. Thus, MDM, which later become EMM, proceeded as a stand-alone market.

However, vendors coming from both the CMT and EMM markets have broadened their endpoint platform support. As organizations support a declining number of Win32 applications, they will increasingly use the EMM model to manage their Windows PCs — a state we've termed "unified endpoint management" (UEM). There will be three waves of UEM convergence (see Figure 1):

- Wave 1: Organizations use separate processes and tools to manage PCs and mobile devices. Most organizations are still in Wave 1.
- Wave 2: Organizations use separate processes, but the same tools, to manage mobile devices. CMT vendors are best-positioned to provide Wave 2 solutions.
- Wave 3: Organizations use EMM techniques and processes to manage PCs, tablets and smartphones.

At Wave 3, the processes and tools (not just the vendors) for managing PCs, smartphones and mobile devices will become the same. CMTs will have become UEM tools.

Figure 1. The Three Waves of Unified Endpoint Management




Source: Gartner (August 2016)

## Self-Service Becomes the Default for End-User Services

CMTs have had varying degrees of self-service for many years. The ability of CMTs to deliver self-service capabilities continues to grow in importance as organizations look to enhance the management experience for the user, improve the efficiency with which software and services are delivered, increase user productivity and satisfaction, and lower total cost of ownership (TCO). Most CMTs provide self-service interfaces for preapproved applications. Organizations will also implement conditional self-service application delivery functions, such as automating required approvals for an application request. As CMTs evolve, the use of self-service in areas such as troubleshooting, adding printers, and requesting devices will become increasingly mainstream.

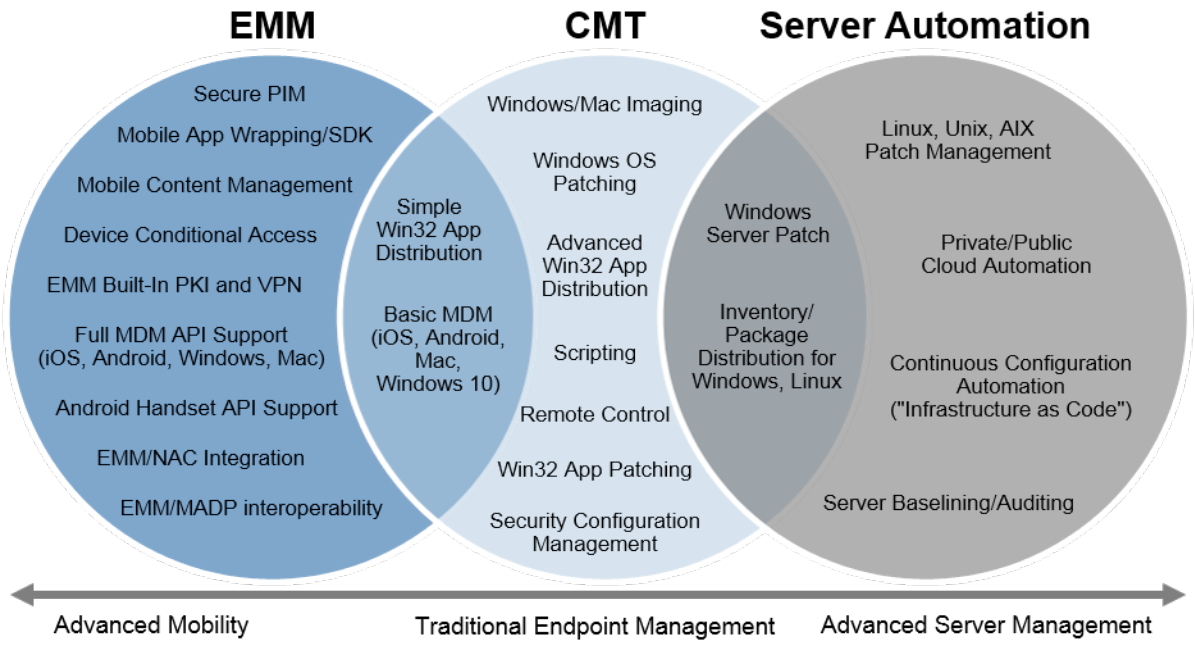
## Managing Access to Local and SaaS Applications

Organizations are experiencing both traditional and new management challenges with SaaS applications. As is common today for Windows applications, administrators often overprovision SaaS applications to users, thus incurring unnecessary costs. It will become increasingly necessary to monitor usage of SaaS applications, just as organizations often do for locally installed applications. Additionally, the broadening array of devices necessitates "conditional access," in which a user's device state must be examined before providing access to applications. Conditional access is achieved through the cooperation of the endpoint management tool and an identity management solution.

## Market Analysis

CMT vendors have designed their products to address particular use cases or customer segments to establish differentiation. Some vendors have designed their products for large-enterprise customers, while others created more usable tools that may lack some advanced features and scalability. Many organizations want to include the management of adjacent endpoints (such as mobile devices and servers) in the scope of the CMT requirements. CMT vendors have optimized their tools to address the challenges of managing the PC life cycle; however, they do provide basic functionality to manage both mobile devices and servers. Organizations that support all of these systems from a single team often want a tool that can support as many of their platforms as possible. While some vendors are getting close, there is no suite of tools that is fully integrated that provides complete features across all three areas. Organizations must make functional trade-offs if they were to use a single tool across mobile devices, PCs and servers (see Figure 2).

Figure 2. Client Management Tools Provide Basic Mobile and Server Management




Source: Gartner (August 2016)

Buyers of CMTs should observe the following scenarios in determining their product requirements.

### Unified Endpoint Management: Tying Together CMT and EMM

While the trend is toward a consolidated toolset, advanced CMT and EMM functionality come from mostly different vendors. CMTs provide the most advanced functionality for PCs. EMMs provide the most advanced mobility management functionality. Organizations must determine their functional requirements to see if a common toolset across PCs and mobile devices is practical. CMT vendors

that have also qualified for the "Magic Quadrant for Enterprise Mobility Management Suites" are best-positioned to provide "Wave 2" UEM capabilities today.

## Client and Server Management

Large organizations usually have separate teams, using separate tools, to manage servers and PCs. However, midsize enterprises often use CMTs to manage servers because these organizations are more likely to have a high percentage of Windows servers, and to have the same team manage both PCs and servers. CMTs are generally capable at managing Windows servers. Some CMTs also have basic functionality (inventory, basic package deployment) for Linux servers as well. CMTs with more advanced server management capabilities can provide imaging, inventory, patch management and configuration baseline (desired state) across multiple platforms, such as Windows and Linux.

## Advanced Mac Management

Macs represent a relatively small portion of enterprise endpoints. Consequently, most CMT vendors have given Mac management secondary priority. However, organizations are increasingly providing formal support for Mac clients. Gartner client inquiries about Mac management tools were up about 25% in the first half of 2016, compared to the first half of 2015. Most CMT vendors provide, at least, basic Mac management capabilities (inventory, software distribution, patching). More advanced Mac management vendors provide inventory, patching, software distribution and remote control, but also include capabilities oriented toward end-user self-service. Such capabilities include support for the Apple Device Enrollment Program, an enterprise app store, self-service options for printer configuration, requesting IT services and the like.

## Security and Compliance

Many security exposures are the result of missing patches or systems that aren't configured properly. Some CMT vendors focus on providing rapid inventory reporting to identify emerging threats. Others provide vulnerability scanning capabilities and security configuration enforcement, based on best practices or regulatory compliance standards (for example, National Institute of Standards and Technology, Center for Internet Security, PCI-DSS, and many others). CMTs can also manage and report on endpoint security agents, both proprietary and from third-party security vendors, for basic indicators of compliance (such as agent version, health or last scan).

## Ease of Deployment and Use

Vendors don't make their tools deliberately hard to use, but some have a wide array of functions, often necessarily at the expense of simplicity. Organizations with limited resources focus on a select set of basic functions, and they value turnkey solutions that do not require large-scale configuration, substantial infrastructure to support the tool, or customization to navigate the tool and perform tasks. Small and midsize organizations often favor a CMT with an integrated IT service support management tool, because the service desk is usually responsible for endpoint engineering and administration.

### Large Global Enterprise

The number of vendors focused on the large enterprise (defined as more than 10,000 PCs) has diminished, as this segment has become almost fully penetrated. Consequently, the number of vendors making continued enhancements for large enterprises is decreasing. Large organizations should consider scalability factors, such as how many endpoints per management server the CMT vendor supports, bandwidth management capabilities, distribution methods, software distribution visibility and diagnostics.

## Representative Vendors

*The vendors listed in this Market Guide do not imply an exhaustive list. This section is intended to provide more understanding of the market and its offerings.*

This Market Guide research supersedes the "Magic Quadrant for Client Management Tools." Our aim here is to establish a broader picture of the market and call out a greater number and diversity of vendors offering products and services enabling client management capabilities.

### Accelerite

**Product:** Radia

Accelerite Radia client automation is a very scalable product that allows a small centralized management team to manage a very large environment. It excels at complex software distributions and maintaining desired state on the endpoint. The Radia on-premises product is complex and requires expertise that must be maintained to get high performance. To address this issue, Accelerite also provides the Radia cloud offering, positioned for customers with less technical expertise. Accelerate is best-suited for large global enterprises, particularly those that want to manage servers along with PCs.

### BMC

**Product:** BMC Client Management

BMC Client Management (BCM) is targeted at midsize businesses, and is sold frequently as an add-on to BMC's service desk products Remedyforce and FootPrints. BCM has a simple user interface, making it accessible to IT staff that lack substantial desktop administration expertise. It's a good fit for midsize organizations looking for an easy product to use with an integrated service desk.

### CA Technologies

**Product:** CA Client Automation

CA's Client Automation is a capable CMT that has been in the market for many years. CA's visibility in this market has been declining in the last several years. Nevertheless, Client Automation is a good fit for organizations looking to manage servers and server-hosted virtual desktop

environments along with Windows PCs. It is an especially good fit for customers of other related CA products, such as IT Asset Manager, Service Desk Manager and CMDB.

## ConnectWise

**Product:** LabTech IT Management Platform

ConnectWise offers both on-premises and cloud-based CMT solutions. LabTech by ConnectWise has been updating its UI to a new tile-style interface for both PC and patch management to provide a more unified theme and improve ease of use of the tool. ConnectWise's acquisition of ScreenConnect in 2015 adds additional remote support capabilities; however, the product does not offer OS deployment functionality. LabTech by ConnectWise is a good fit for midsize organizations looking for ease of deployment and use.

## Dell Software

**Product:** Kace

Dell recently announced that Kace will be included in the divestiture of the Dell Software business to Francisco Partners and Elliott Management. Kace has spent the last six years as a part of Dell, and developed some Dell-specific capabilities (such as automated driver management of Dell PCs). The divestiture will not lead to significant shifts in product focus. Kace had always been designed for midsize organizations, which is still where the opportunities lie. Customers should ensure that their requirements and Kace's product plans are still in alignment by requesting a 12-month roadmap. Kace is a good fit for midsize organizations looking for ease of deployment and use.

## FileWave

**Product:** FileWave

FileWave management suite supports Macs, Windows and mobile devices, and is differentiated in its Mac management and software distribution capabilities for Windows and Macs. While FileWave supports a wide range of platforms, and Gartner finds that most FileWave customers have a managed Mac environment. FileWave's Fileset technology is an application packaging and deployment tool that allows administrators to manage applications at the file level, which allows for flexible delivery and updating options. FileWave is a good fit for organizations supporting advanced Mac management scenarios that also want a single tool for Windows and mobile platforms.

## Heat Software

**Product:** Heat LANrev; Heat Desktop & Server Management (Heat DSM)

Heat Software acquired the Absolute Manage business from Absolute, and renamed "Absolute Manage" as "Heat LANrev." LANrev provides consistent management capabilities across Mac and Windows platforms. LANrev is a good fit for organizations supporting advanced Mac management scenarios that also want a single tool for Windows and mobile platforms.

Heat DSM is an easy-to-use client management product that is regularly bundled with Heat's service desk and asset management products. Heat DSM offers a good balance of easy-to-use, wizard-driven functionality for less experienced users, and more advanced functionality, such as scripting, for users more experienced with client management. Heat DSM is a good fit for midsize organizations that want an easy-to-use tool that can also manage servers.

## IBM

**Product:** IBM BigFix

IBM BigFix is a scalable CMT with strengths in cross-platform patching (PCs and servers) and managing endpoint security configurations. IBM has been enhancing the integration between BigFix and MaaS360, which together comprise IBM's UEM offering. While the BigFix architecture allows organizations to manage a large number of endpoints with relatively few servers, it is a more complicated product for administrators to learn and use. BigFix is a good fit for midsize to large, security-focused organizations. It also is a good choice for organizations that want to combine UEM and server patching with CMT.

## JAMF Software

**Product:** Casper Suite

JAMF specializes in Apple iOS and OSX management, and thus is often used alongside other EMT and EMM tools. It has a strong following for OSX management and has a "user first" philosophy that supports automated enrollment and management of iOS and OSX devices through its Self Service portal, along with support for Apple's DEP and Volume Purchase Program (VPP). For smaller organizations where limited IT management capabilities are required, JAMF also offers Bushel, a lower-cost SaaS solution. JAMF is a good fit for organizations that require advanced Mac OSX Management.

## Kaseya

**Product:** Kaseya VSA

Kaseya VSA is a broad IT operations management platform providing a wide range of functionality, such as client management, MDM, service desk, network performance monitoring, data backup and endpoint protection, from a common console. Kaseya targets managed service providers and midmarket organizations that are looking for a broad range of functionality. Kaseya is a good fit for organizations looking for a tool that is easy to deploy and use.

## Landesk

**Product:** Landesk Management Suite

Landesk Management Suite (LDMS) is a complete CMT that has integrated EMM and endpoint protection, as well as an integrated (at the data and process level) IT service and support tool. In the last year, Landesk acquired Xtraction, which provides a reporting platform, as well as AppSense,

which adds virtual desktop management and user profile management. While Landesk is making improvements to simplify the product to allow certain IT roles to more easily use it, LDMS is a sophisticated and more complicated tool for administrators to use. Landesk is a good fit for organizations that are looking for UEM and integrated endpoint security capabilities.

## ManageEngine

**Product:** Desktop Central

ManageEngine Desktop Central is an easy-to-use, cost-effective client management product with basic functionality, aimed primarily at small and midsize companies. ManageEngine provides an integrated MDM tool as well as a separate Active Directory administration product. Desktop Central is easy to install and to get up and running. It is a good fit for organizations looking for a tool that is easy to deploy and use.

## Matrix42

**Product:** Matrix42 Physical

Matrix42 provides a UEM solution through a combination of its longtime CMT (Matrix42 Physical) and the 2014 acquisition of EMM vendor Silverback. Matrix42 positions its overall offering as a workspace management solution by combining UEM with an integrated service desk and service catalog. For CMT, the vendor provides packaging and scripting capabilities as a cloud service that includes more than 1,900 prepackaged software packages. Matrix42 customers are predominantly in Europe and Australia, and Matrix42 is a good fit for organizations looking for a UEM solution that is easy to use.

## Micro Focus

**Product:** ZENworks Configuration Management

Micro Focus' ZENworks Configuration Management is a mature CMT with a long history in the market. Its software distribution is strong, offering advanced capabilities for managing application package dependencies and deploying applications to users (rather than only to machines). ZENworks is integrated with an endpoint protection product. It also manages servers (SUSE Linux and Windows). ZENworks is a good fit for midsize organizations that want integrated client management and endpoint security capabilities.

## Microsoft

**Product:** System Center Configuration Manager (Configuration Manager)

Microsoft has the largest market share in the CMT market by a wide margin. Microsoft's licensing strategy of offering Configuration Manager as a part of the Core and Enterprise Client Access Licenses is the main driving force behind this. Microsoft has made major changes to Configuration Manager in the last year by moving it to a continuous update model to keep up with Windows 10

updates. Microsoft also continues to enhance Intune, its EMM product. Microsoft is a good fit for large organizations that require a UEM solution.

## Symantec

**Product:** Symantec Client Management Suite

Symantec Client Management Suite (CMS) is a comprehensive client management product with a large installed base of longtime customers. CMS is a part of IT Management Suite (ITMS), which includes Symantec's asset management, server management and service desk modules. With version 8, Symantec made significant architectural changes to make ITMS more scalable, and capable of supporting mobile and laptop devices off the enterprise network. Symantec is attempting to re-enter the EMM market with ITMS, but has not achieved significant adoption of its solution for managing mobile devices. CMS is a good fit for midsize organizations and those who want to manage servers along with PCs.

## Tanium

**Product:** Tanium Core Platform and Tanium Product Modules

Tanium is an endpoint management and security vendor focused on scalable and rapid endpoint discovery, threat detection, remediation and endpoint management. Tanium can quickly discover hardware and software inventory, distribute software, patch and remediate using a linear chain architecture. Tanium has largely drawn interest for its product's security benefits; it is used most often alongside another CMT, primarily because Tanium does not have OS deployment. Tanium has improved its CMT both through product development and a recent partnership with VMware, in which VMware Mirage provides an integrated OS migration and imaging offering. Tanium is a good fit for organizations looking for quick endpoint visibility, and for security-focused organizations that are looking for rapid endpoint detection and remediation.

## Verismic Software

**Product:** Cloud Management Suite

Verismic is a newer entrant to the client management market, having launched its product, Cloud Management Suite, in 2014. The product targets small to midsize organizations and MSPs. Verismic offers an agentless, cloud-based solution to facilitate patching, remote control, software distribution and inventory, and agent-based solution for PC power management. As is common with other cloud-based solutions, Cloud Management Suite does not provide OS distribution. Verismic is a good fit for organizations looking for ease of deployment and use.

## VMware

**Product:** AirWatch

AirWatch came to market as an EMM vendor, and expanded into traditional CMT functions to address (primarily) laptop management scenarios. AirWatch is part of the Workspace One suite that

also includes desktop virtualization and an identity-as-a-service offering, brought together through a self-service portal. AirWatch does not have an OS deployment option, but VMware Mirage provides an advanced OS deployment and recovery tool. AirWatch is a good fit for organizations looking for a UEM solution with advanced Mac OS management.

## Market Recommendations

- Identify and assess your concerns with your existing CMT. Organizations that are unsatisfied with their existing CMT should understand why they are dissatisfied. Failure to get full value out of the tool could be due to a lack of knowledge or skills, rather than a failure of the tool itself.
- Identify requirements in each domain, if you are an end-user computing leader looking to combine EMM and CMT. The number of vendors providing comprehensive capabilities in both spaces is small.
- Consider SaaS-based client management tools if your organization lacks the resources to operate and manage a traditional client management tool. However, don't use a SaaS-based tool expecting it to obviate system administration knowledge and skills, such as scripting and packaging. You need these capabilities regardless of the client management tool.
- Evaluate a CMT if you need a comprehensive multiplatform server management tool but can't afford enterprise tool prices, but be prepared to make concessions on server life cycle automation functionality.
- Ensure that patching and security configuration management practices are meeting your requirements, as part of an endpoint security strategy. Most vulnerabilities have a patch or configuration fix.
- Analyze whether your existing CMT, or one you are considering, is sufficient for your Mac needs, particularly in the areas of self-service and Apple DEP/VPP support.
- Prioritize scalability factors, network optimization and distribution methods when selecting a CMT if your organization is large.

## Gartner Recommended Reading

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

"Gartner Retires the Magic Quadrant for Client Management Tools"

"Manage PCs as Mobile Devices for the Right Use Cases"

"Choose the Right Architectures to Protect Mobile and Endpoint Devices"

"Hype Cycle for Unified Workspaces, 2016"

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