

# Magic Quadrant pour la gestion de projet adaptative et le reporting

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Des outils de gestion de projet et de création de rapports adaptatifs automatisent la livraison continue pour aider les dirigeants stratégiques à prendre des décisions basées sur les données. Cette étude évalue 16 fournisseurs proposant ces technologies pour gérer au mieux un rythme accéléré de changement et une livraison continue.

## Hypothèse de planification stratégique

D'ici 2024, 80 % des entreprises numériques intégreront la gestion de portefeuille stratégique et les technologies adaptatives de gestion de projet et de reporting, et adopteront de nouveaux cadres et normes pour obtenir des résultats commerciaux précieux.

## Définition/Description du marché

*Ce document a été republié le 23 août 2022. Le document que vous consultez est la version corrigée. Pour plus d'informations, consultez la page [Corrections](#) sur [gartner.com](#).*

Ce Magic Quadrant pour la gestion de projet adaptative et le reporting est la première version de ce Magic Quadrant. Il remplace le [Guide du marché 2021 pour la gestion de projet adaptative et le reporting](#).

La gestion de projet adaptative et le reporting (APMR) est l'un des sous-marchés composant le marché global de la gestion de portefeuille de projets (PPM). Les équipes de travail et de projet dans ces environnements recherchent des solutions logicielles qui répondent à leurs besoins. Il s'agit notamment d'optimiser les pratiques globales de gestion de projet et les besoins complexes de gestion des ressources ; promouvoir la collaboration continue et l'unification d'équipes diverses et distribuées ; s'adapter à l'évolution des besoins des clients, orchestrer la création de valeur par le biais d'approches méthodologiques multiples ; et soutenir les approches d'exécution fondées sur la prise de décision basée sur la valeur et sur les perceptions du délai de rentabilité de leurs clients.

Comme cette recherche est le premier Magic Quadrant publié pour le seul marché de l'APMR, une compréhension claire des distinctions entre l'APMR et la gestion de portefeuille stratégique

(SPM) est importante. Il aidera à la sélection d'un outil idéal adapté aux besoins d'une organisation.



APMR est un cadre pour soutenir les méthodologies, les comportements et les technologies opérationnelles qui permettent la gestion du changement et une meilleure opérabilité des activités d'exécution détaillées alignées à la fois sur la stratégie et les opérations.

La SPM est un ensemble de capacités commerciales, de processus et de technologies de support nécessaires à la gestion et à l'adaptation du portefeuille à l'échelle de l'entreprise, ainsi qu'à la transformation et à la mise à l'échelle réussies de l'entreprise numérique. Les responsables de la gestion de portefeuille stratégique (par exemple, les responsables informatiques, les chefs d'entreprise et les responsables EPMO) ont tous besoin d'outils SPM prenant en charge l'alignement et l'adaptation de la stratégie à l'exécution à l'échelle de l'entreprise.

Il existe des solutions technologiques séparées et distinctes sur les marchés APMR et SPM. Les solutions technologiques APMR se spécialisent dans les activités d'exécution efficaces tout en permettant la transparence, le reporting au portefeuille et la facilitation de la communication et de la collaboration au niveau du groupe de travail. Ces outils peuvent être utilisés dans les petites et grandes organisations, guidés par une approche de sélection adaptée pour garantir que le choix optimal d'un produit de fournisseur est en alignement avec la préparation organisationnelle et la maturité de l'APMR. Les acheteurs potentiels d'APMR, les responsables de PMO et les chefs de projet exigent bien plus que des solutions de gestion des tâches. Ils exigent les bons outils pour gérer les complexités des conditions commerciales dynamiques d'aujourd'hui. Ces acheteurs ont besoin d'outils pour prendre en charge l'intégration des pratiques de développement traditionnelles avec des méthodes de travail agiles, adaptatives et hybrides tout en générant des niveaux élevés de productivité de la part des contributeurs et des membres de l'équipe.


Pour suivre le rythme des ambitions numériques de leurs organisations, les acheteurs doivent identifier l'étape correspondante de leur parcours numérique et le niveau relatif de leur maturité APMR pour informer leur liste restreinte de produits de fournisseurs potentiels.

## **Habilitation**

Ce niveau est la maturité organisationnelle initiale/fondatrice de l'APMR. Il se concentre sur le soutien aux équipes qui développent des capacités numériques partagées pour renforcer leurs compétences en gestion du changement. Il met l'accent sur les domaines clés de la responsabilité partagée ou de l'engagement : gestion de la demande, hiérarchisation, suivi du temps des ressources, gestion des efforts de projet et de travail et rapports prêts à l'emploi.

## **Optimisation**

Ce niveau correspond à la maturité organisationnelle intermédiaire de l'APMR. Il s'appuie sur les compétences et les attributs existants autour de la gestion du changement dans l'organisation. Ces organisations adaptent les styles de gouvernance pour favoriser l'agilité, modernisent leur gestion des capacités/ressources dans tous les domaines et augmentent l'autonomie dans toute

leur hiérarchie afin d'optimiser la gestion financière et la prise de décision basée sur la valeur. Les organisations situées à l'extrémité supérieure de cette échelle de maturité se lancent dans l'expérimentation de rapports et d'analyses personnalisables et de communications améliorées. 

## Transformation

Ce niveau s'applique aux organisations ayant l'APMR comme compétence. Il est soutenu par de multiples solutions techniques offrant une richesse de capacités numériques. Il s'appuie sur les fondations établies au cours des phases d'activation et d'optimisation pour transformer l'organisation en s'adaptant pour répondre aux différents besoins des utilisateurs, aux différents niveaux de gouvernance et aux pratiques de mise à l'échelle. Cela garantit une valeur maximale à chaque interaction entre le changement et le travail de routine. Ces organisations hautement numériques et complexes nécessitent la transparence des données, l'automatisation et la sécurité zéro confiance pour permettre la flexibilité requise dans des niveaux de risque acceptables.

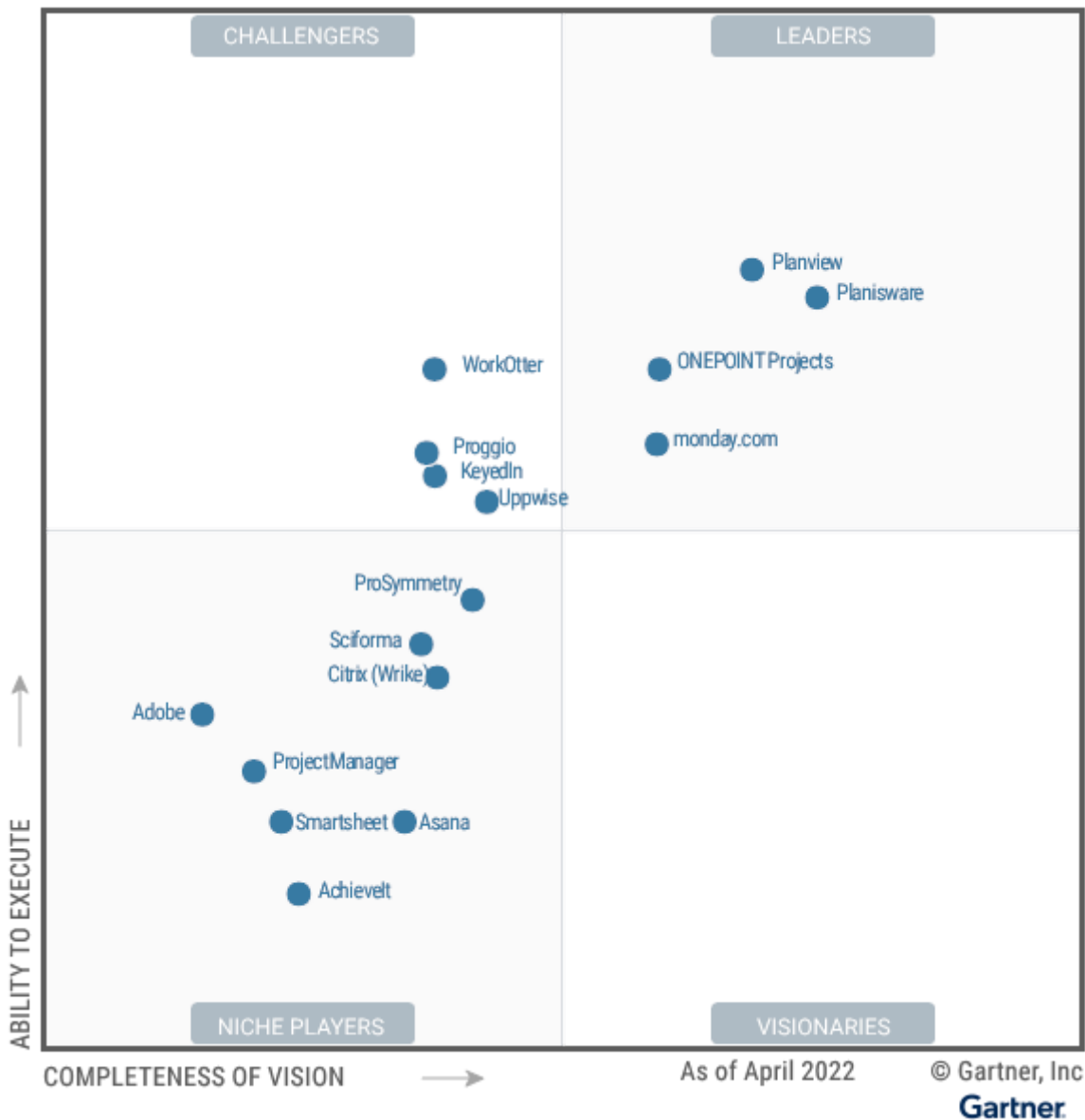
Le marché de l'APMR est encombré d'une concentration de produits de vendeurs de niche et de challenger à la limite. Cela reflète les changements sismiques dans l'architecture numérique et la dépendance d'une organisation à son égard au cours des deux dernières années. En réponse aux exigences changeantes du commerce numérique, aux dynamiques politiques, aux complexités du développement, aux contraintes de ressources et aux risques financiers, les outils APMR se sont différenciés par leur capacité à répondre aux besoins de leurs principaux clients. Beaucoup se sont appuyés sur leurs forces et leurs capacités fondamentales pour évoluer fonctionnalités au-delà de leur mandat traditionnel. Comme pour tout marché perturbateur, de nombreux fournisseurs ont choisi de développer des fonctionnalités via des fusions et acquisitions, dans l'espoir d'homogénéiser les différentes capacités de plusieurs produits en une seule solution. Cette caractéristique « naissante » des produits inclus dans cette recherche se reflète dans les groupes d'acteurs de niche et de challengers.

Alors que les contrecoups de la perturbation sont toujours présents, les fournisseurs reconnaissent l'évolution des besoins des clients et réagissent avec des innovations opportunes, mais cette approche pourrait ne pas suffire. Les fournisseurs qui détectent activement, innovent en permanence, ont la meilleure compréhension du marché et traduisent cette compréhension en stratégies de marketing et de vente efficaces, émergent actuellement en tant que leaders. Cette recherche reflète l'état actuel du marché de l'APMR, qui évolue quotidiennement.

## Quadrant magique

**Figure 1 : Magic Quadrant pour la gestion de projet adaptative et le reporting**





Source : Gartner (août 2022)

## Points forts et mises en garde du fournisseur

### Parvenir

Achievelt est un acteur de niche dans ce Magic Quadrant. Son produit, appelé Achievelt, est largement axé sur la fourniture d'un outil de gestion du travail basé sur un plan. Ses activités se déroulent entièrement aux États-Unis et ses clients sont généralement des entreprises de taille moyenne à grande dans des secteurs tels que la santé, le gouvernement, les services publics et l'éducation. Achievelt a annoncé en août 2021 avoir reçu une autorisation d'exploitation (ATO) du programme fédéral de gestion des risques et des autorisations (FedRAMP) par l'intermédiaire du Bureau de gestion des programmes (PMO). La disponibilité sur le marché FedRAMP a permis à son produit d'être utilisé dans l'ensemble du gouvernement fédéral.

### Forces

- **Compréhension du marché :** L'accent mis par Achievelt sur l'éducation et les clients fédéraux démontre sa capacité à répondre aux besoins distincts de ces industries au sein de ce marché.
- **Compréhension des besoins des clients :** Achievelt connaît bien la gestion de projet adaptative et est capable de prendre en charge plusieurs rôles au sein de ses organisations clientes.

- **Feuille de route du produit** : Achievelt a une feuille de route claire pour mieux répondre aux besoins spécialisés du gouvernement fédéral et des secteurs de l'éducation.



### **Précautions**

- **Orientation produit** : Achievelt se concentre principalement sur les plans, limitant potentiellement la capacité d'exécution pour les clients qui envisagent de prendre en charge des produits et des projets.
- **Taille de l'organisation** : Achievelt dispose d'une petite équipe qui prend en charge le produit, ce qui soulève des inquiétudes quant à sa capacité à prendre en charge les grandes entreprises clientes.
- **Solidité financière** : Achievelt a reçu plusieurs séries de financement de démarrage pour soutenir la viabilité du produit à ce jour, et doit démontrer une croissance correspondante de la clientèle pour soutenir ces investissements et d'autres.

### **Adobe**

Adobe est un acteur de niche dans ce Magic Quadrant. Son produit, appelé Adobe Workfront, est axé sur la gestion des tâches/travail dans un environnement hybride. Ses opérations sont géographiquement diversifiées et ses clients sont généralement de grandes organisations dans des secteurs tels que la vente au détail, les médias et le divertissement, et l'hôtellerie. La feuille de route du produit Workfront d'Adobe comprend l'amélioration de ses capacités de stratégie et de planification avec une planification et une gestion financière agiles, et un investissement accru dans la connexion des capacités d'Adobe Workfront avec le portefeuille de produits Adobe.

### **Forces**

- **Capacités d'assistance** : la fonction globale de service client d'Adobe prend en charge Adobe Workfront dans le cadre de la famille de produits Adobe, en plus des options de service client spécifiques à Adobe-Workfront.
- **Innovation produit** : l'accent mis par Adobe Workfront sur l'amélioration des besoins en matière de stratégie et de planification et sur les besoins de sécurité, de contrôle, de gestion des données et d'analyse de niveau entreprise s'aligne bien sur les besoins des grandes entreprises.
- **Solidité financière** : Adobe dispose d'une solidité financière en tant que société multinationale rentable et cotée en bourse.

### **Précautions**

- **Compréhension des besoins des clients** : Adobe Workfront se concentre sur les besoins des projets axés sur le marketing plutôt que sur les besoins plus larges de l'acheteur APMR, y compris les projets informatiques et d'entreprise.
- **Feuille de route du produit** : l'accent mis par Adobe Workfront sur une expérience utilisateur Adobe transparente remet en question l'exhaustivité de sa vision du marché APMR par rapport

au marché du contenu créatif.

- **Focus sur le marché : la dépendance d' Adobe Workfront** à la stratégie de marché globale d'Adobe avec une approche d'extension et d'expansion indique que le marché APMR est une priorité secondaire.



## **Asana**

Asana est un acteur de niche dans ce Magic Quadrant. Son produit, appelé Asana, est principalement axé sur la gestion des tâches/du travail afin de fournir une connectivité collaborative entre les efforts de travail. Ses activités sont géographiquement diversifiées et ses clients sont généralement des entreprises de taille moyenne à grande dans des secteurs tels que la vente au détail, les biens de consommation et les médias. La feuille de route des produits d'Asana répond aux commentaires des clients et inclut les besoins universels en matière de rapports, l'alignement des objectifs sur l'exécution et les améliorations continues de l'intégration.

### *Forces*

- **Partenariats de mise en œuvre** : Asana compte un grand nombre de partenaires de distribution qui contribuent aux services produits, notamment la mise en œuvre, l'intégration et l'intégration du système.
- **Innovation produit** : le modèle de données Work Graph d'Asana est la base des investissements prévus dans des capacités de reporting et d'intelligence artificielle (IA)/apprentissage automatique (ML) plus avancées.
- **Présence géographique** : Asana a une présence géographique via des bureaux locaux ou des partenaires de distribution en Amérique du Nord, EMEA et APAC.

### *Précautions*

- **Solidité financière** : La solidité financière d'Asana est essentielle à sa capacité à continuer à maintenir et à innover son produit. Fondée en 2008, Asana est devenue une société cotée en bourse en septembre 2020 mais continue de fonctionner à perte.
- **Évolutivité des produits** : la taille moyenne des transactions d'Asana suggère que le fournisseur vend souvent à des clients qui ont besoin d'un petit nombre de licences (moins de 20) pour des contrats d'un an. Ces moyennes indiquent également qu'Asana n'évolue pas régulièrement pour prendre en charge des centaines ou des milliers d'utilisateurs pour un seul client.
- **Focus sur le marché** : les messages marketing d'Asana mentionnent la résolution des besoins de l'entreprise et des équipes, mais ses fonctionnalités de développement se concentrent principalement sur la gestion des tâches/du travail et la collaboration d'équipe, en mettant moins l'accent sur la gouvernance et la conduite des résultats organisationnels.

## **Citrix (Wrike)**

Citrix (Wrike) est un acteur de niche dans ce Magic Quadrant. Son produit, appelé Wrike, est principalement axé sur la gestion collaborative des projets et du travail en équipe. Ses opérations sont géographiquement diversifiées et ses clients sont généralement des entreprises de taille moyenne à grande dans des secteurs tels que la fabrication, la vente au détail et les médias. La feuille de route des produits de Wrike comprend un investissement continu dans l'IA et l'automatisation et sa technologie Work Graph dans le cadre de son objectif global d'unification du travail et des flux de travail dans les systèmes d'entreprise.



### **Forces**

- **Capacités d'assistance** : l'organisation de réussite client, l'académie en ligne et le site de la communauté d'utilisateurs de Wrike fournissent une gamme de services en libre-service et de conseil pour faciliter la mise en œuvre.
- **Évolutivité du produit** : la taille moyenne des transactions de Wrike correspond souvent à un plus petit nombre de licences ; cependant, il a également de l'expérience dans les déploiements pour des milliers d'utilisateurs.
- **Présence géographique** : la société mère de Wrike, Citrix, possède des bureaux en NA, EMEA et APAC, complétés par de nombreux partenaires de distribution mondiaux.

### **Précautions**

- **Complexité du produit** : les produits complémentaires de Wrike incluent Wrike Integrate (un moteur offrant des plans d'intégration prédéfinis pour une variété de systèmes tiers) ; Wrike Lock (pour une sécurité et un cryptage de niveau entreprise) ; et Project Sync (qui configure des synchronisations bidirectionnelles entre un compte Wrike et quatre systèmes intégrés : Jira, Bitbucket, GitLab et GitHub). Ce sont des frais distincts et uniquement disponibles au troisième niveau et au-dessus, Business Plus.
- **Product Innovation**: Citrix's leadership in cloud computing and virtualization brings into question whether the vision of the parent company will alter the focus on Wrike away from the APMR market versus the software infrastructure and engineering market.
- **Implementation Effort**: Wrike has extensive customization flexibility, but proper customization often requires considerable effort.

### **KeyedIn**

KeyedIn is a Challenger in this Magic Quadrant. Its product, called KeyedIn Enterprise, was formerly known as KeyedIn Projects. It is mainly focused on project execution activities including resource, time and expense management. Its operations are geographically diversified, and its clients tend to be small to midsize organizations in industries such as healthcare, retail and financial services. KeyedIn's product roadmap includes investments in AI and ML to develop predictive analytics capabilities.

### **Strengths**



- **Implementation Partnerships:** KeyedIn has partners in different geographic regions, available on-site and remote, to support implementations and training.
- **Support Capabilities:** KeyedIn provides timely and reliable support staff for setup and technical issues.
- **Product Innovation:** KeyedIn's recent product releases involving reporting and financial management improvements demonstrate responsiveness to two key areas of customer feedback.

### **Cautions**

- **Product Awareness:** KeyedIn relies upon its website as the primary means for sharing its product strategy. It is not actively engaged in digital marketing activities to communicate news about its product roadmap or to share its thought leadership about the evolving needs of the APMR market.
- **Pricing:** KeyedIn's pricing model is based on the core capabilities for KeyedIn Projects, but additional licensing fees are required for organizations looking for more advanced capabilities.
- **Financial Strength:** KeyedIn is a privately held company that is profitable but also continuously seeks external investments, most recently for the purpose of debt funding.

### **monday.com**

monday.com is a Leader in this Magic Quadrant. Its product, called monday.com, is focused on providing a complete project and work management tool that supports the needs of distributed teams using hybrid ways of working. Its operations are geographically diversified, and its clients tend to be of varying sizes in industries like IT, professional services, media and healthcare. monday.com's product roadmap includes becoming a Scaled Agile Framework (SAFe) partner, improved workload management, new dashboard and analytics features, and new security/governance features.

### **Strengths**

- **Understanding of Market:** monday.com has a clear understanding of the adaptive and flexible needs of a global workforce that requires collaboration for effective planning and execution.
- **Product Roadmap Innovation:** monday.com has a clear roadmap that includes expanded capabilities achieved through RPA and AI advancements.
- **Geographical Presence:** monday.com has 150+ global channel partners, and offices in North America, South America, EMEA and APAC.

### **Cautions**

- **Methodology:** monday.com's capabilities are highly configurable and, while it does offer a range of best practice templates, customers do need to have some degree of project management methodology practices already in-house to guide shaping the product usage for their organization.



- **Pricing:** monday.com offers multiple tiers of pricing that increase incrementally via sets of user groups by type of user. Each tier has a degree of granularity in which some foundational capabilities are sprinkled across Basic, Standard and Pro tiers.
- **Product Scaling:** monday.com offers two products, monday projects and monday dev, that together provide capabilities for adaptive/agile ways of working. To achieve this set of capabilities with the features needed for multiple agile teams, Pro- or Enterprise-level pricing would be needed.

### **ONEPOINT Projects**

ONEPOINT Projects is a Leader in this Magic Quadrant. Its product, called ONEPOINT Projects, is focused on planning and controlling work execution. Its operations are predominantly in one office location and one sales office in EMEA, and its clients tend to be small organizations in industries like financial services, media and government. ONEPOINT Project's product roadmap includes idea management (demand capturing), portfolio budgeting (water line and scenarios) and web user interface improvements.

#### ***Strengths***

- **Marketing Presence:** ONEPOINT Projects' creation of trial versions and free cloud plans for up to four users, SEO/data-driven web marketing, and tradeshow participation demonstrate efforts to proactively extend its market reach to APMR buyers.
- **Methodology:** ONEPOINT Project's foundations in core project management industry standards can drive consistency of practices across an organization, improving project management maturity.
- **Product Innovation:** ONEPOINT Projects has a demonstrated commitment to continuous innovation as indicated by its relatively high investment in R&D, guided by a detailed product roadmap and quarterly releases.

#### ***Cautions***

- **Organization Size:** ONEPOINT Projects has a small employee base that may impact its ability to deliver on the configuration and customization needs of large client organizations.
- **Product Focus:** ONEPOINT Projects has strong IT-centric project management foundations that can support administrative/organizational projects. Buyers with non-IT use cases will have to adapt to increase its appeal to users outside of IT.
- **Geographical Presence:** ONEPOINT Projects has a limited geographical presence with one office in Austria, one sales office in Germany and complete reliance upon Austria-based partners to provide training, coaching or business consulting services.

### **Planisware**



Planisware is a Leader in this Magic Quadrant. Its product, called Orchestra, is focused on providing a broad range of project and work management needs based upon project management standards. Its operations are geographically diversified, and its clients tend to be midsize to large organizations in industries like financial services and manufacturing. Orchestra's product roadmap includes additional sprint planning capabilities, document management enhancements and a UX redesign of the side panel.

### **Strengths**

- **Financial Strength:** Planisware is a well-established, profitable company that consistently invests in R&D for product development.
- **Product Roadmap:** Planisware differentiates its understanding of buyer needs in the APMR market with Orchestra's planning, execution and collaboration focus while also providing capabilities to connect with enterprise portfolio management.
- **Geographical Presence:** Planisware's market presence, partner network and employee staff are located in the same regions as its primary customer regions of North America and EMEA.

### **Cautions**


- **Product Complexity:** Despite Planisware's 50+ partnership network and the availability of technical support and consulting services, Orchestra's UI and navigation require a learning curve that can impact the timeline to full productivity.
- **Pricing:** Orchestra's broad product capabilities and respective pricing may not fit the budgetary constraints many buyers face while procuring APMR technology.
- **Product Awareness:** Planisware does not have a strong marketing/social media presence, which impacts potential buyer awareness for the brand. This is reflected in both client inquiry and Gartner's analysis of social media conversations.

### **Planview**

Planview is a Leader in this Magic Quadrant. Its products are called Planview Clarizen and Planview PPM Pro. Clarizen is Planview's offering for large organizations focused on a broader set of project and work management needs aimed at an enterprise level. Planview's product roadmap for Clarizen includes third-party tool enhancements such as seamless communications with MS Teams and bidirectional integration with agile tools. PPM Pro is focused on bringing foundational project management discipline aimed at departmental-level needs for midsize organizations. Planview's roadmap for PPM Pro includes new reports for KPI trend fields, Project Gantt and Kanban/Card view enhancements. Planview's operations are geographically diversified, and its clients tend to be in industries such as manufacturing and natural resources, financial services, media and utilities.

### **Strengths**

- **Geographical Presence:** Planview has offices in NA, EMEA and APAC, complemented by numerous global channel partners.

- **Implementation Approach:** Planview has well-defined and flexible implementation approaches to facilitate incremental configuration based upon the buyer's organizational readiness. 
- **Industry Diversity:** Planview has experience in applying its project management expertise across a broad set of industries.

### **Cautions**

- **Product Complexity:** Both Clarizen and PPM Pro provide capabilities for adaptive/agile ways of working, albeit with different product packaging. To achieve this set of capabilities in PPM Pro, additional licensing and configuration are needed for not-yet-seamless integration with Projectplace (collaboration) and LeanKit (agile) modules.
- **Implementation Effort:** PPM Pro offers “fast track” implementation packages to expedite basic implementation within a few weeks with additional time expected for more refinements. Clarizen implementation efforts for basic functionality are three weeks to two months, a three-to-four month configuration target, and an additional five to six months for core enterprise integrations or custom-made development.
- **Product Roadmaps:** Planview has product roadmaps for both Clarizen and PPM Pro. More capabilities and enhancements are planned for Clarizen, a more comprehensive project management product, whereas more functional/operational plans are aligned with PPM Pro.

### **Proggio**

Proggio is a Challenger in this Magic Quadrant. Its product, called Proggio, is focused on broad project and work management capabilities. Its operations are focused in Israel, with a subsidiary in the U.S., and its clients tend to be midsize to large organizations in industries like biotech, technology and manufacturing. Proggio's product roadmap includes integration with multiple work management solutions, and an additional KPI module and information feed that can be integrated with enterprise messaging apps.

### **Strengths**

- **Unique Licensing:** Proggio offers multiple tiers for licensing depending upon customer selection (e.g., Basic, Business, Professional), and all come with an unlimited number of users.
- **Understanding of Customer Needs:** Proggio is adaptable to support varied work types in both IT and non-IT industries.
- **Support Capabilities:** Proggio implementation does not need assistance from specialist partners. This “low touch” product approach is consistent with customers' feedback.

### **Cautions**

- **Financial Strength:** Proggio recently closed and announced venture capital funding for the operation of the business. The path to profitability is targeted for 2024.
- **Geographical Presence:** Proggio has a limited geographical presence with its headquarters in Israel and a subsidiary in the U.S. It has a small employee base – the R&D and product teams

are located in Israel, with 70% of the licenses in the U.S.

- **Product Roadmap:** Proggio has established a high number of integrations with lower-level systems (execution-focused) but not yet for core enterprise systems.



## **ProjectManager**

ProjectManager is a Niche Player in this Magic Quadrant. Its product, called ProjectManager, is focused on the needs of hybrid work and distributed teams. Its operations are primarily in one location in the U.S. with development located in New Zealand. Its clients tend to be small to midsize organizations in industries like manufacturing and software/high tech. ProjectManager's roadmap includes a complete UI redesign, new integrations for collaborative work (e.g., Zoom), improvements to existing integrations (e.g., Slack), and improved dashboards and reports.

### **Strengths**

- **Understanding of Market:** ProjectManager is adaptable, especially for supporting hybrid working (multiple methodologies) with considerations for geographically distributed teams and the needs of more than just project managers.
- **Implementation Approach:** ProjectManager provides a free trial version of its products and has introduced a new go-to-market approach with customer success teams to further focus its product to individual client needs.
- **Product Awareness:** ProjectManager is increasing overall product awareness and placement in the APMR market through investments in digital marketing, new pricing and trial licensing options, and the development of independent software vendor partnerships.

### **Cautions**

- **Geographical Presence:** ProjectManager has a limited geographical presence with its headquarters in Austin, Texas, and a mostly remote workforce.
- **Support Capabilities:** ProjectManager does not have any channel partners that assist in product services, and all support is provided remotely.
- **Product Innovation:** ProjectManager has not yet made any investments in AI or RPA technologies, which are instrumental in APMR tools providing much-needed productivity gains for all user types.

## **ProSymmetry**

ProSymmetry is a Niche Player in this Magic Quadrant. Its product, called Tempus Resource, is focused on project planning and execution with an emphasis on resource management needs. Its operations are geographically diversified, and its clients tend to be midsize to large organizations in industries like financial services, manufacturing and professional services. ProSymmetry's product roadmap for Tempus Resource includes AI-based skill/profile matching for use in resource requests/replacement/approvals, expanded project decision tracking with a global roll-up, and integration with MS Teams.

## Strengths

- **Unique Implementation Support:** ProSymmetry offers a fixed price fee versus hourly fees for implementation services with pricing available at three different tiers of service.
- **Geographical Presence:** ProSymmetry extends its geographical base outside of the U.S. through multiple EMEA-based offices, an EMEA channel partner, and offices in Brazil and Singapore.
- **Market Presence:** ProSymmetry actively participates in multiple marketing channels including conferences and tradeshows to demonstrate its project management expertise and market reach.

## Cautions

- **Organization Size:** ProSymmetry has a small employee base that may impact its ability to maintain the pace of innovation required to remain competitive in this crowded market.
- **Understanding of Customer Needs:** ProSymmetry's capabilities are heavily weighted toward the intricate needs of resource management above all other project management capabilities.
- **Product Roadmap:** ProSymmetry has not invested in functionality to support the collaborative needs of hybrid work and distributed teams.

## Sciforma


Sciforma is a Niche Player in this Magic Quadrant. Its product, called Sciforma, is focused on a broad set of project planning and execution capabilities. Its operations are geographically diversified, and its clients tend to be large organizations in industries like pharmaceuticals/biotechnology, financial services and manufacturing (food and beverages). Sciforma recently acquired One2Team, a collaborative PPM vendor. Sciforma's product roadmap includes UI/UX enhancements, an API engine and AI/ML capabilities for time cards.

## Strengths

- **Product Enhancements:** Sciforma bases 25% of its product roadmap ideas on user community feedback, demonstrating responsiveness to the changing needs of its customers.
- **Geographical Presence:** Sciforma has offices in the U.S., EMEA and APAC, complemented by distributors covering other parts of the globe including South America and Africa, and a global implementation partnership.
- **Industry Diversity:** Sciforma is adaptable to support varied work types in both IT and non-IT industries.

## Cautions

- **Product Roadmap:** Sciforma provides capabilities for the collaborative needs of adaptive/agile ways of working through its not yet seamless integration of One2Team, acquired in October 2021, which is underway and anticipated to be finished by year-end 2022.

- **Pricing:** Sciforma's pricing model is based on complex pay-as-you-go pricing that uses tokens rather than per-seat licensing. The number of tokens needed for a user is determined by the  nature of the data object (e.g., issue or project) that the user needs to be able to edit. This atypical pricing, which does provide buyers with flexibility needed for enterprisewide deployment, might require more advanced deployment planning than customers may be accustomed to with other software tools.
- **Implementation Approach:** Sciforma's incomplete integration with One2Team, providing integration with third-party apps and collaborative capabilities, requires dual pricing and configuration efforts to tune the two products for client needs.

## Smartsheet

Smartsheet is a Niche Player in this Magic Quadrant. Its product, called Smartsheet, is focused on foundational project planning and execution capabilities. Its operations are geographically diversified, and its clients tend to be midsize to large organizations in industries like technology, financial services and communications. Smartsheet's product roadmap includes capacity planning, what-if analysis and enhanced analytics.

### Strengths

- **Geographical Presence:** Smartsheet has a geographical presence through local offices or channel partners in NA and EMEA.
- **Product Strategy:** Smartsheet has a clear roadmap to further support both new/improved capabilities and refinement of data management.
- **Market Presence:** Smartsheet actively participates in over 200 events per year (e.g., conferences and tradeshows) to demonstrate its product capabilities and extend market reach.

### Cautions

- **Product Roadmap:** Smartsheet has been slow to complete its integration of 10,000ft, the acquisition from May 2019 that provides its resource management capabilities. Buyers close to winnowing down to its final one to two products should be aware of this yet-to-be-refined core project management need.
- **Pricing:** Smartsheet's pricing model is based upon a set of core capabilities. However, additional capabilities available on an a la carte basis and respective pricing may not fit the budgetary constraints many buyers face while procuring APMR technology.
- **Methodology:** Smartsheet's capabilities are predicated on form-/spreadsheet-based functionality. While the interface may be familiar to organizations shifting away from email and spreadsheet-based practices, customers will need established project management methodology practices in-house to guide shaping the product usage for their organization.

## Uppwise



Uppwise is a Challenger in this Magic Quadrant. Its APMR product, called Uppwise APM, is focused on providing adaptive project management needs based on project management industry standards. Its operations are in two locations in EMEA (Italy and the U.K.) and one in India, and its clients tend to be of varying size in industries like manufacturing and natural resources, financial services and utilities. Uppwise APM's roadmap includes objectives and key results inclusion, interactive user guides, and extended/improved integrations for collaborative needs.

### **Strengths**

- **Understanding of Market:** Uppwise differentiates its product offerings between the APMR market focused on execution and collaboration versus its other offerings in service of strategic portfolio management needs.
- **Product Awareness:** Uppwise has invested in digital marketing through its blog, website and social media platforms to support its product rebranding efforts and overall product awareness in the APMR market in the U.S.
- **Implementation Partnerships:** Uppwise extends its geographical base outside of Italy through partnerships with IBM and Accenture to support sales and integration services.

### **Cautions**

- **Geographical Presence:** Uppwise has a limited geographical presence with its headquarters in Italy and the majority of its staff in Asia.
- **Organization Size:** Uppwise has a small employee base reliant upon remote support for its mainly EMEA-based clients. This support model may require further scaling to provide responsive support to large or complex global clients.
- **Industry Diversity:** A large portion of Uppwise's client base is from manufacturing and natural resources, so continued diversification will be important to ensure product roadmap considerations meet the needs of clients in multiple industries.


### **WorkOtter**

WorkOtter is a Challenger in this Magic Quadrant. Its product, called WorkOtter, is focused on providing clients with prescriptive guidance built upon project management industry best practices. Its operations are in two locations in the U.S. and one in EMEA, and its clients tend to be midsize to large organizations in industries like government, financial services and utilities. WorkOtter's product roadmap includes productivity enhancements such as integration with MS Teams and Zapier, and the addition of personal Kanban boards.

### **Strengths**

- **Pricing:** WorkOtter's product capabilities foster the establishment of solid project management methodology standards at a modest price point, which may appeal to organizations with initial to medium project management maturity.



- **Financial Strength:** WorkOtter is a profitable, privately held company that has not needed to rely upon outside investment to maintain its organization or its continued product evolution. 
- **Implementation Approach:** WorkOtter's implementation plan of 30 days provides a quick path to establishing effective project management practices.

### **Cautions**

- **Organization Size:** WorkOtter has a small employee base that may impact its ability to deliver timely innovations to its product and be responsive to changing customer needs.
- **Limited Localization:** WorkOtter is available in English only but can localize currency, date and number formats within this limitation.
- **Geographical Presence:** WorkOtter has a limited geographical presence with two offices in the U.S. and one in EMEA.

## **Inclusion and Exclusion Criteria**

### **Inclusion Criteria**

- A provider must demonstrate active participation in the APMR market as a pure-play PPM software company – with a clear and primary software business model, as opposed to a consulting business model.
- The software products must not require the purchase of a separate, non-PPM technology platform from the provider to obtain APMR functionality. The provider also must not require customers to invest in a set of extensions or modules as part of a “single source” value proposition from a software provider competing primarily in markets other than APMR.
- The software provider must actively market, sell and support one or more stand-alone APMR software products or online application services.
- The software provider must focus mainly on collaborative, enterprisewide, IT and product-based PPM use cases.
- The software provider must demonstrate a solid track record of successful APM and reporting technology deployments, and companion APMR consulting services for most of its APMR customers.
- The software products must offer comprehensive, integrated project work, hybrid work, resource management, and reporting features and capabilities.
- The provider and its product (or products) must demonstrate longevity in the APMR market, providing general availability and active marketing to APM and reporting leaders for at least the past five consecutive years, and without any significant company, product or service disruptions.
- The provider must be able to demonstrate significant APMR market presence, including market penetration, sales and support for multiple regions of the world.





- The provider must be able to demonstrate a viable, proven and evolving SaaS strategy.
- The provider must demonstrate a solid product development and innovation cadence shorter than 12-month intervals.
- The provider must have secured at least 10 new APMR customers (not repeat business or renewals) during the past 12 months.
- The provider must have at least \$5 million in annual APMR software revenue or reliable financial backing.

### Exclusion Criteria

- “Certified partners” of primary APMR technology providers, systems implementers, or consulting firms that use an APMR provider’s technologies to deliver “products” or “solutions” for APMR are not included.
- ERP, ITSM, SFA and other similar platform vendors that offer APMR extensions or modules from their base platforms are not included.
- Vendors with a primary focus on, and significant presence in, niche or specialized PPM markets are not included.
- Products focused on the following use cases are not included:
  - Agile development and work management
  - Outsourced IT services or system integration project and work management
  - Client-facing professional services project and work management
  - Hybrid work management outside of IT

### Evaluation Criteria

#### Ability to Execute

**Product or Service:** Evaluation of the application services of the providers in this defined market was conducted, including current product/service capabilities, quality, feature sets and skills, as defined in the Market Definition/Description section and detailed in the subcriteria. This included those that offer natively or via OEM agreements/partnerships. This also included an assessment of multiple, independent APMR products supporting differing APMR audiences and use cases. Ease of use, balanced with functional depth and cost-effective pricing, was examined, as well as how well and how complete the vendor and products support APMR depth and breadth.

Capabilities specifically needed for project managers, project contributors and PPM leaders were evaluated. Scalability of any applicable products and breadth of deployment options for varied APMR use cases were also assessed. Advancements in applying AI and RPA to APMR technology

were measured, in terms of availability in the product and its adoption of it by customers in the field.



**Overall Viability (Business Unit, Financial, Strategy, Organization):** This was 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 its products. Also, assessed was a measure of the probability that the provider will continue offering the product and will advance the state of the art within its portfolio of products. Organic and other signs of growth were noted.

**Sales Execution/Pricing:** The provider's capabilities in all presales activities and the structure that supports them were examined. This included responsiveness in sales engagement, deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel. Renewal rates, compared to reported losses due to nonrenewals, were evaluated.

**Market Responsiveness/Record:** This was an assessment of the responsiveness of providers, focusing on ability and proven track record in responding quickly and changing development and/or company direction to meet the needs of an evolving marketplace – either through acquisition or by other means. How well and how quickly providers executed a multi-APMR product strategy to support an expansive APMR marketplace was measured. Providers should be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve, and/or market dynamics change. This criterion also considered the provider's history of responsiveness to customer requests. Its track record in the field was also examined.

**Marketing Execution:** We analyze 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.
- Establish a positive identification with the product/brand and organization in the minds of buyers.

This mind share could have been driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities. Digital marketing campaign activity was also measured.

**Customer Experience:** Relationships, products and services/programs enabling clients to be successful with the products evaluated were researched. This includes the ways customers receive technical or account support. Services/programs were evaluated, including APMR process consulting services, at little or no extra cost, that enabled clients to be successful with the products. Levels of responsiveness in technical support or account support were examined. Ancillary tools, customer support programs (and the quality thereof), availability of user groups

and SLAs were noted. Customers' impressions of doing business with the provider were examined.



**Operations:** The ability of the organization to meet its goals and commitments was measured. Factors include the quality of the organizational structure, such as skills, experiences, programs, systems, the underlying infrastructure and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis. Security and data privacy were also measured.

## Ability to Execute

**Table 1: Ability to Execute Evaluation Criteria**

<b>Evaluation Criteria</b> ↓	<b>Weighting</b> ↓
Product or Service	High
Overall Viability	High
Sales Execution/Pricing	Medium
Market Responsiveness/Record	High
Marketing Execution	Low
Customer Experience	High
Operations	High

Source: Gartner (August 2022)

## Completeness of Vision

**Market Understanding:** This is an assessment of the ability of the provider to understand buyers' wants and needs and to translate those into strong APM and reporting offerings. Providers that showed the highest degree of vision listen to and understand buyers' wants and needs and can shape or enhance those with their added vision. The provider's marked recognition of, and periodic departure from, core product development to exploratory product development or other

activities (e.g., M&A) to address the needs of an expansive APM and reporting marketplace, and even further beyond it, were examined.



**Marketing Strategy:** A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements were recorded and evaluated.

**Sales Strategy:** The strategy for selling products using the appropriate network of direct and indirect sales, marketing, service, and communications affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base were measured.

**Offering (Product) Strategy:** The provider's approaches to product development and delivery, emphasizing differentiation, functionality, methodology and feature sets as they map to current and future requirements, were examined. Value as it relates to deployment, ease of use, ease of accessibility and ease of adoption were measured. A cost-competitive pricing model or models, as evidenced in the field, was also measured. Native features and functions, versus reliance on OEM agreements, were assessed. Functionality supporting bottom-up and top-down APM and reporting implementations, as well as depth and breadth of support for use cases defined in other Gartner PPM research, were also taken into account. Scalability, depth and breadth of the product were analyzed. Process consulting options, including remote process consulting, were also noted. Integration with customers' core systems, as well as to non-IT third-party data sources and software systems, were examined. The ability to support a global installed base was measured. Acquired products that are tracked post-acquisition to determine if the provider is simply "maintaining" a product line with small enhancements versus truly innovating it by adding new, meaningful capabilities (or integrating multiple acquired products) using aggressive development efforts were analyzed. Customer response to the vendor's product strategy and tangible customer benefits derived from product strategy was also considered. Applying AI and RPA to APM and reporting technology was also examined.

**Business Model:** The soundness and logic of the provider's underlying business proposition was measured. How well the business model provides value to customers was examined, as well as how far it reaches to support multiple APM and reporting use cases.

**Vertical/Industry Strategy:** The provider's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets, was examined.

**Innovation:** Direct, related, complementary and synergistic layouts of resources, expertise, or capital for investment, consolidation, defensive or pre-emptive purposes was assessed. Also evaluated was the vendor's ability to offer seasonal product releases and exhibit rapid development and agile-driven releases. Functionality demonstrating a strong product vision that pushes the market – not just the provider – in new directions was analyzed. This is a gauging of the ability to lead the "herd" of the market, rather than follow it.

**Geographic Strategy:** An assessment was made of the provider's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside its "home" or native

geography. The strategy could be executed directly or through partners, channels and subsidiaries, as appropriate for that geography and market.



## Completeness of Vision

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

<b>Evaluation Criteria</b> ↓	<b>Weighting</b> ↓
Market Understanding	High
Marketing Strategy	Medium
Sales Strategy	High
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Low
Innovation	High
Geographic Strategy	Medium

Source: Gartner (August 2022)

## Quadrant Descriptions

### Leaders

Leaders have a demonstrable understanding of the wide range of customer needs in the APMR market, largely responsive to the more advanced levels of APMR methodology maturity within their customer base. Leaders actively engage in the market as thought leaders, and help to drive customer success with strong foundational project and work management capabilities coupled with well-defined implementation plans. These vendors have a Completeness of Vision exhibited

by their product, marketing and sales capabilities required to drive market acceptance on a global scale.



## Challengers

Challengers have solid success markers such as growing market revenue, dedication to continuous innovation to meet shifting customer needs, and maintaining strong presence in the APMR market. Challengers also demonstrate reach into a diverse set of industries, strong foundations in project management best practices, and consistently positive customer reviews about vendor performance, effective support models, and operational strength.

## Visionaries

The APMR market does not yet have any Visionaries identified. This is reflective of the unpredictability of the independent variables in the APMR market: clients' response to global opportunity or crisis and how vendors react to meet shifting demands.

At present, there is very little differentiation across many of these vendor responses to the shift to adaptive ways of working. As this is a crowded market, all the vendors evaluated offer much of the same basic commodity functions and a very similar value proposition. As the market matures, and Niche Players continue to advance their Completeness of Vision, they may in time show as entrants into the Visionaries quadrant.

Product innovation that meets the needs of the dynamic work environment of digital business along with ways to better differentiate them to support different points in an organization's digital journey will be the hallmarks of future Visionaries. New entrants into this quadrant would offer advancements such as data collection and insight analysis driven by AI, next-level dynamically linked dashboards informed by ML models, or significant productivity gains achieved with NLP interfaces.

## Niche Players

Niche Players have strength in different capabilities of their products, often resonating more with customers from specific industries from which they initially targeted their potential customer base. Movement toward the Challengers quadrant is going to be driven by advances in their Ability to Execute in areas such as customer experience, market responsiveness and sales effectiveness.

## Context

The Magic Quadrant for APMR tools assesses the viability of vendors offering products in this marketplace. A variety of evaluation criteria was used to produce a relative placement of each vendor against those criteria. This analysis is complemented by the Critical Capabilities for Adaptive Project Management and Reporting, which analyzes 10 key capabilities across four use cases. The use-case filter helps buyers prioritize the capabilities that have the greatest beneficial impact from APMR products offered by these vendors. Gartner strongly recommends that organizations use this research in conjunction with the Critical Capabilities companion research, Gartner Peer Insights and other Gartner research to define their requirements and select solutions that match their needs.



To select the best tool to support adaptive project management methodology:

- Ensure APMR tool functionality is fit for purpose by assessing the capabilities and features that complement the organization's maturation, support the mix of delivery frameworks, and align with your specific projected use cases.
- Facilitate user adoption by qualifying the tool's ease of use, productivity and collaboration capabilities, as well as the extent of the vendor's implementation and support services.
- Determine the architecture alignment by evaluating the solution's ability to support the user interface and transparency needs, and the organization's deployment and security requirements.

## Market Overview

Providers in this Magic Quadrant include those focused on building their capabilities off of project management industry best practices in combination with addressing the reality of a multimethodology environment caring for projects and products. When evaluating and positioning the vendors included in this research, emphasis is placed on vendor products that include core project management capabilities that are adaptable to the coexistence of traditional project management practices and agile/product management practices, and the depiction of a unified portfolio.

Customers are seeking APMR technology to address the dynamics of digital business and to resolve emergent business disruptions due to an inability to manage an accelerated pace of change and continuous delivery.


While the APMR market is crowded, vendors seek differentiation and are making enhancements to their products including:

- Innovative product roadmaps to keep pace with the rate of customer demand for a convergence of features to meet the needs of adaptive project work management
- Efficient implementation approaches to enable fast onboarding of core capabilities for immediate organizational benefit
- Responsive customer support capabilities that provide training, configuration, integration and adoption services
- Reduced product complexity through seamless module integrations that deliver a comprehensive set of capabilities

## Evaluation Criteria Definitions

### Ability to Execute

**Product/Service:** Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether

offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria. 

**Overall Viability:** 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/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 website, advertising, customer programs and positioning statements.

**Sales Strategy:** The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.



**Offering (Product) Strategy:** The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements. 

**Business Model:** The soundness and logic of the vendor's underlying business proposition.

**Vertical/Industry Strategy:** The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

**Innovation:** Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

**Stratégie géographique :** la stratégie du fournisseur pour orienter les ressources, les compétences et les offres afin de répondre aux besoins spécifiques des zones géographiques en dehors de la zone géographique "d'origine" ou d'origine, soit directement, soit par l'intermédiaire de partenaires, de canaux et de filiales, selon les besoins de cette zone géographique et de ce marché.

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