

# Magic Quadrant pour les applications d'intelligence artificielle dans la gestion des services informatiques

9 octobre 2024 - ID G00806427 - 32 min de lecture

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Les applications d'intelligence artificielle dans la gestion des services informatiques sont des outils qui utilisent l'IA pour augmenter et étendre les flux de travail ITSM afin de fournir des conseils et des actions intelligents aux responsables I&O et à leurs équipes de support informatique. Ce Magic Quadrant évalue 10 fournisseurs et leurs produits compatibles avec l'IA sur ce marché.

## Hypothèses de planification stratégique

D'ici 2027, 50 % des projets d'IA dans les services informatiques seront abandonnés en raison de coûts imprévus, de risques ou d'une incapacité à atteindre le retour sur investissement prévu.


D'ici 2027, l'IA générative (GenAI) créera plus d'articles de support informatique et basés sur les connaissances que les humains.

## Définition/Description du marché

Gartner définit les applications d'intelligence artificielle dans la gestion des services informatiques comme des outils qui augmentent et étendent les flux de travail de gestion des services informatiques (ITSM) à l'aide de l'IA. Ces outils analysent les données et les métadonnées ITSM (principalement présentes dans les plateformes ITSM) pour fournir des conseils et des actions intelligents sur les pratiques et les flux de travail ITSM, tels que les activités de support et de service informatique. Ce logiciel peut être un produit autonome, des fonctionnalités au sein d'une plateforme ITSM ou un module complémentaire à une plateforme ITSM.

Les dirigeants d'I&O sont confrontés à des coûts de support en hausse et à une baisse de l'engagement et de la productivité des employés.

Les capacités d'IA permettent aux équipes I&O d'optimiser les processus de gestion des services et du support informatique (tels que la gestion des incidents et des problèmes) grâce à la connaissance et à l'automatisation. Cela peut conduire à une réduction tangible des coûts, comme des économies de main-d'œuvre grâce au traitement automatique des problèmes et des demandes d'assistance, des résolutions plus rapides et une précision accrue du tri, de la

catégorisation et de l'identification des experts. En plus de réduire les frais généraux, les solutions d'IA peuvent améliorer l'expérience utilisateur des employés et renforcer la relation du service informatique avec le consommateur professionnel. Certaines fonctionnalités, telles que les conseils intelligents sur les risques, peuvent aider les dirigeants I&O à éviter les perturbations et à fournir des services informatiques fiables. 

Les capacités d'IA générative sont de plus en plus recherchées pour automatiser la génération de contenu et améliorer les communications. Il s'agit par exemple de résumer des informations, telles que des articles de bases de connaissances ou des mises à jour de journaux de travail, et de générer des notifications d'incidents majeurs.

Le **prisme des cas d'utilisation : l'intelligence artificielle pour le service d'assistance informatique** fournit des détails supplémentaires sur les opportunités d'IA et d'IA générative que des outils tels que les applications d'IA pour ITSM sont en mesure d'aborder.


### Capacités indispensables

Au minimum, une application d'IA pour ITSM doit générer des conseils ou des actions sur les pratiques ITSM, en utilisant une analyse des données et métadonnées ITSM assistée par l'IA et l'apprentissage automatique .

### Capacités standard

Les capacités standard pour ce marché incluent :

- Agent de support virtuel en tant qu'interface conversationnelle orientée entreprise-consommateur.
- Découverte de connaissances simples :
  - Solution et mise en correspondance des connaissances provenant d'une ou plusieurs sources de connaissances.
  - Découverte de connaissances publiques à l'aide de modèles de langages publics de grande taille (LLM).
- Conseils d'agent via :
  - Triage intelligent, pour guider la priorisation.
  - Catégorisation intelligente des cas par service, élément de configuration ou solution.
  - Escalade intelligente des cas avant qu'ils n'atteignent des seuils de niveau de service chronométrés .
  - Conseil intelligent sur les risques liés aux changements prévus à l'aide d'un historique de versions similaire (clustering).
  - Essaimage intelligent pour identifier les experts et les groupes de résolution.

- Détection d'anomalies alimentée par le regroupement de cas (avec incidents, problèmes, modifications, articles de connaissances, éléments de configuration) pour fournir : 
- Détection d'incident majeur lorsque les équipes de support informatique reçoivent des incidents de la part des utilisateurs finaux qui ont un impact très élevé, mais qui ne sont pas déjà détectés par les plateformes de surveillance ou AIOps.
- Détection de problèmes lorsque plusieurs incidents sont signalés et peuvent partager un problème commun et une cause profonde.

## Capacités optionnelles

Les fonctionnalités optionnelles qui sont peu courantes ou des caractéristiques différenciantes pour ce marché incluent :

- Découverte de connaissances étendues :
  - Découverte de connaissances privées à l'aide d'un LLM personnalisé formé uniquement sur des connaissances propriétaires.
  - Découverte de connaissances universelles via des LLM pré-entraînés personnalisés ou via une génération augmentée de récupération (RAG).
- Conseils d'agent étendus :
  - Analyse des causes profondes pour la gestion des problèmes basée sur une analyse des groupes de cas connexes.
  - Optimisation des processus pour identifier les goulots d'étranglement et les gaspillages, et optimiser les flux de travail dans la plateforme ITSM.
  - L'IA émotionnelle avertit des mauvaises expériences de service et/ou des faibles scores d'expérience numérique des employés (DEX) lorsque les consommateurs professionnels contactent le service d'assistance informatique.
  - Identifiez une résolution potentielle à un incident en proposant un article de connaissances ou un livre d'exécution.
- Génération de contenu à l'aide de l'IA générative :
  - Génération de connaissances sur les solutions générées à partir des notes du journal de travail ou des conversations du centre de support collaboratif.
  - Communications automatiques pour générer et affiner les mises à jour de cas ou les notifications d'incidents majeurs.
  - Résumé du cas :



- Résumé des demandes entrantes pour aider les experts à comprendre les nouveaux incidents et demandes.
- Synthèse post-appel intelligente pour affiner et standardiser les notes du journal de travail sténographique de l'agent.
- Résumé des incidents majeurs pour les revues post-incident
- Extraction de cas en langage naturel.
- Interface conversationnelle permettant au personnel d'infrastructure et d'exploitation (I&O) d'effectuer des actions ou de générer des rapports à l'aide du langage naturel et de l'intégration LLM.

## Quadrant magique

Figure 1 : Magic Quadrant pour les applications d'intelligence artificielle dans la gestion des services informatiques



### Points forts et précautions du fournisseur

#### Aisera

Aisera est leader dans ce Magic Quadrant. Lancée en 2017, l'application IA d'Aisera dans le domaine de l'ITSM est composée de plusieurs produits, dont AI Service Desk, AiseraGPT, AI Copilot, AI Search, Aisera Agent Assist et AIOps. Ces produits sont conçus pour fonctionner avec des plateformes ITSM tierces ainsi qu'avec la propre plateforme ITSM d'Aisera, Next-Gen ITSM. Les opérations d'Aisera sont principalement concentrées en Amérique du Nord.




Pour GenAI, Aisera utilise son propre LLM basé sur Llama, ou les clients peuvent apporter leur propre modèle avec intégration dans OpenAI GPT, Mixtral, Google Gemini et d'autres LLM. Les récentes améliorations du produit incluent l'ajout de la prise en charge linguistique du farsi et de l'hébreu, ainsi que la prise en charge supplémentaire d'agents de chat en direct tiers tels que Sinch, Freshchat et Amazon Connect. Les futurs plans de développement de produits incluent des fonctionnalités AI SecOps, des avatars AI et l'extension des capacités multimodales avec la voix, la vidéo et le texte.

### **Points forts**

- **Prise en charge complète des cas d'utilisation** : Aisera couvre un large éventail d'applications d'IA dans les cas d'utilisation ITSM au sein de son offre. Les clients peuvent exploiter le LLM propriétaire d'Aisera ou apporter leurs propres modèles et utiliser LLM Studio pour les ajuster avec leurs propres connaissances et données ITSM.
- **Premier acteur** : Aisera est un pionnier sur ce marché, avec de nombreuses fonctionnalités introduites avant 2023. Aisera maintient une cadence de publication mensuelle ainsi que plusieurs canaux pour communiquer les plans de publication à ses clients.
- **Messagerie axée sur la confiance** : pour répondre aux préoccupations des clients en matière de sécurité et de confidentialité, le cadre TRAPS (Trusted, Responsible, Auditable, Private, Secure) d'Aisera fournit un ensemble équilibré de principes directeurs pour offrir aux clients une visibilité sur leur approche de conception et de déploiement d'applications GenAI.

### **Précautions**

- **Coût élevé** : le prix de l'application d'IA d'Aisera dans ITSM, ainsi que les modules complémentaires requis pour fournir l'ensemble complet des fonctionnalités disponibles, dépassent les moyens de certains clients potentiels qui paient également pour une plate-forme ITSM.
- **Équipe commerciale réduite** : La force de vente d'Aisera est réduite et s'appuie sur des revendeurs tiers pour la majorité de ses ventes. Cependant, Aisera ne dispose pas actuellement de suffisamment de partenaires pour maintenir la croissance de sa clientèle et faciliter les activités de soutien aux ventes.
- **Présence mondiale limitée** : Aisera a une présence limitée en dehors de l'Amérique du Nord et n'a aucun service de mise en œuvre ni partenaire en Amérique latine, en Afrique ou au Moyen-Orient.

BMC is a Niche Player in this Magic Quadrant. Launched in 2018, BMC's AI application in ITSM is composed of AI features in its ITSM platform, specifically BMC Helix IT Service Management Advanced, including BMC HelixGPT. It is designed to work alongside its own ITSM platform. BMC's operations are geographically diversified. 

For GenAI, BMC customers must provide their own LLM with integration into either Microsoft Azure OpenAI or OpenAI GPT. Recent product enhancements include the introduction of the HelixGPT gateway service and subclustering of common incident resolution descriptions in BMC's Proactive Problem Management offering. Future product development plans include deeper integration of the vendor's AIOps offerings into its AI application in ITSM, AI-enabled knowledge management and natural-language-driven report generation.

### **Strengths**

- **Practice lead enablement:** BMC's product is well-suited to ITSM practice leads through its case clustering capability, which provides major incident and problem managers with real-time incident correlation.
- **Robust business model:** BMC maintains a large number of IT operations management (ITOM) customers with a broad offering of related products. BMC's AI application in ITSM gives those customers a platform expansion opportunity with integrated ITOM features.
- **Sales reach:** BMC has both a large internal sales force and extensive partner network that provide the capacity to reach a broad range of customers and prospects.

### **Cautions**

- **Lack of market focus:** The way that BMC communicates its understanding of this market frequently focuses on its existing ITOM software, such as monitoring and observability tools, rather than on the requirements and capabilities of AI applications in ITSM. This demonstrates a limited awareness of competitors and the emerging potential of AI applications in ITSM.
- **Slow release cadence:** BMC's annual major release cadence is slower than its competitors. This puts its customers at risk of falling behind in a very dynamic market.
- **Limited awareness:** BMC has run few marketing campaigns promoting its AI capabilities in ITSM. This has resulted in limited customer awareness and low adoption rates of these features.

### **Espressive**

Espressive is a Niche Player in this Magic Quadrant. Launched in 2017, Espressive's AI application in ITSM is composed of its Barista and Agent Co-Pilot offerings. These products are designed to work alongside third-party ITSM platforms, as well as Espressive's own case management solution, Barista Case Management. Espressive's operations are mostly focused in North America.

For GenAI, Espressive utilizes multiple LLMs, including OpenAI GPT and Claude. Recent product enhancements include adding NICE CXone integration for managed service provider (MSP) call center support, and enhanced enterprise search. Future product development plans include virtual support agent enhancements with deeper learning capabilities, visual knowledge graphs and automation to simplify service catalog integration.



### **Strengths**

- **Frequent release cadence:** Espressive maintains a frequent release cadence, with monthly major and minor releases, as well as weekly updates to its language model. Its customers automatically inherit the latest releases as their tenants are automatically upgraded.
- **Voice support enhancements:** Espressive's partnerships with contact center as a service (CCaaS) providers demonstrate an understanding of growing demand for integrated voice support from buyers focused on the end-user self-service use case.
- **Fully managed:** Espressive offers its product as a fully managed solution, which reduces the implementation and configuration overhead for its customers.

### **Cautions**

- **Narrow focus:** Espressive's product strategy skews heavily toward conversational AI, leaving open gaps in the product such as change, problem and major incident support. This will limit its future appeal beyond the end-user self-service use case.
- **Lack of brand awareness:** Espressive's focus on partnering with MSPs rather than end-user organizations has resulted in reduced awareness of its product among I&O leaders.
- **Limited sales capacity:** Espressive maintains a small direct sales force and a limited number of partners that sell its product. This will limit its ability to facilitate sales support activities and has resulted in reduced customer growth via direct channels.

### **Freshworks**

Freshworks is a Niche Player in this Magic Quadrant. Launched in 2023, Freshworks' AI application in ITSM is composed of its Freddy AI offerings. These products are designed to work alongside its own ITSM platform, Freshservice. Freshworks' operations are geographically diversified.

For GenAI, Freshworks utilizes Microsoft Azure OpenAI and Mixtral. Recent product enhancements include updated reporting for Freddy Copilot, as well as adding GenAI for automated resolution note creation. Future product development plans include expanded knowledge federation for the virtual support agent, knowledge gap identification and intelligent risk assessment for change management.

### **Strengths**

- **Comprehensive product roadmap:** Freshworks maintains a well-rounded, 24-month product roadmap with enhancements across end-user support, agent enablement and practice

manager insights.

- **Low management overhead:** The simplicity of the product offers customers the opportunity to reduce administration effort to achieve results with the features that are currently provided.
- **Flexible licensing:** Freddy Copilot can be purchased for a subset of the ITSM platform agents, which can help Freshworks customers manage their spend.

### **Cautions**

- **Lack of market focus:** Freshworks' perspective on the AI applications in ITSM market is centered on its existing ITSM platform, resulting in a lack of a comprehensive understanding of competitors. This puts Freshworks at risk of misalignment with market trends and at a competitive disadvantage.
- **Inconsistent support experiences:** Freshworks does not commit to any defined resolution targets in its service-level agreement. Some customers report difficulty getting support issues resolved in a timely manner by the provider.
- **Slow time to commercial market:** Some features, including Freddy Insights, are still in open beta, leaving customers without a clear understanding of future costing impacts if and when they become chargeable.

### **Halo Service Solutions**

Halo is a Niche Player in this Magic Quadrant. Launched in 2023, Halo's AI application in ITSM is composed of AI features in its ITSM platform, specifically HaloITSM. It is designed to work alongside its own ITSM platform. Halo's operations are mostly focused in Europe and North America.

For GenAI, Halo has integration into both Microsoft Azure OpenAI and OpenAI GPT. Recent product enhancements include adding knowledge creation based on case wrap-up notes and natural language recognition of when email replies require further action, such as reopening a case or not. Future product development plans include integration into other LLMs, change optimization and AI for configuration management database (CMDB) maintenance.

### **Strengths**

- **Affordable pricing:** While customers may opt to bring their own LLM, they do not require any additional licensing for AI features on top of the cost of Halo's ITSM platform. This makes Halo an attractive option for clients who already have the use of a compatible LLM.
- **Low management overhead:** The simplicity of the product offers customers the opportunity to reduce administration effort to achieve results for the features that are currently provided.
- **Global coverage:** Halo is able to extend its global reach beyond core coverage of Europe and North America, leveraging a network of implementation and reseller partners in all major regions.

### **Cautions**



- **Muted AI messaging:** Halo's marketing has focused on its ITSM platform with little mention of AI. This has significantly hampered awareness of its AI capabilities beyond its existing customers, restricting Halo's growth in this market.
- **Low product innovation:** Halo has a dependence on pretrained open-source and proprietary LLMs, without a strong emphasis on pioneering research or development.
- **Functional gaps:** Halo's product lags more advanced tools in several features, such as operations assistant and AI support for change management. These gaps will limit the vendor's ability to stand out against competing AI applications in ITSM solutions for more mature customers.



## **Moveworks**

Moveworks is a Challenger in this Magic Quadrant. Launched in 2016, Moveworks' AI application in ITSM is composed of Moveworks Copilot, Creator Studio, Employee Experience Insights (EXI) and Knowledge Studio. It is designed to work alongside third-party ITSM platforms. Moveworks' operations are mostly focused in North America.

For GenAI, Moveworks utilizes its own LLM (based on multiple LLMs including OpenAI GPT and Llama), or customers can bring their own model with integration into OpenAI GPT. Recent product enhancements include adding case cluster analysis for knowledge gap identification and GPT-4o support. Future product development plans include virtual support agent improvements, including UI enhancements, support for calendar management and additional integrations.

## **Strengths**

- **Early mover:** Moveworks has been addressing needs for AI in ITSM since 2017. To keep up with the dynamic nature of this market, it has monthly major releases with almost daily feature updates published.
- **Customer awareness:** Moveworks' AI-centric advertising and compelling website content has established good awareness in the AI-driven IT support sector.
- **Focus on enterprise search:** Moveworks focuses strategically on extending its natural language technologies and enterprise search functionality to provide a solution that aligns with evolving conversational AI needs in ITSM.

## **Cautions**

- **Focus outside of IT:** Moveworks' strategy to develop its product for non-IT use cases demonstrates a lack of focus on the AI applications in ITSM market for future developments.
- **Narrow marketing strategy:** Moveworks lacks effective messaging to ITSM buyers beyond the conversational AI use case. This puts Moveworks at risk of losing brand awareness among buyers with broader needs as the market evolves.
- **High cost:** Pricing of Moveworks' AI application in ITSM, plus the add-ons required to provide the full set of available features, is beyond the affordability of some potential customers who

are also paying for an ITSM platform.



## OpenText

OpenText is a Niche Player in this Magic Quadrant. Launched in 2017, OpenText's AI application in ITSM is composed of AI features in its ITSM platform, specifically Service Management Automation X (SMAX) and OpenText IT Operations Aviator. It is designed to work alongside its own ITSM platform. OpenText's operations are geographically diversified.

For GenAI support, OpenText utilizes its own Llama-based LLM, or customers can bring their own model with integration into OpenAI GPT. Recent product enhancements include adding mobile app support for its Aviator virtual support agent and broader language support. Future product development plans include extending its retrieval-augmented generation (RAG) to additional IT case and event records, AI-based change risk assessments and increased multilingual support.

### Strengths

- **Affordable pricing:** OpenText's model of including some AI features within its ITSM platform means that existing customers can upgrade to GenAI features affordably, particularly for the entry-level use case of AI for end-user self-service.
- **Broad enterprise portfolio:** OpenText maintains strong cross-selling opportunities to offer its customers options that leverage its enterprise search and content services technology to extend AI across ITSM.
- **Wide geographic reach:** OpenText has a broad spread of offices and partners around the world, giving it a diverse customer base, especially in some regions like the Middle East where many of its competitors have no market presence.

### Cautions

- **Modest roadmap:** OpenText's long-term roadmap focuses on virtual support agents and exploiting its existing technology (such as expanding access to Aviator within additional ITSM and ITOM workflows). This roadmap focus will make it difficult for the provider to keep up with the needs of more ambitious I&O leaders.
- **Product investment:** Despite a companywide AI research program, OpenText invests a smaller portion of its financial and human resources into research and development of AI applications in ITSM, compared with its competitors in this market.
- **Product administrative overhead:** Several features within OpenText's AI for ITSM product require configuration of business rules. This may mean a greater reliance on professional services and/or business analysis skills within customer organizations.

## Serviceaide

Serviceaide is a Niche Player in this Magic Quadrant. Launched in 2017, Serviceaide's AI application in ITSM is composed of its AI features in its ITSM platform, specifically ChangeGear

and its Luma AI offerings. While its virtual support agent, Luma AI, is designed to work alongside both Serviceaide's and third-party ITSM platforms, broader applications of AI are provided as part of its own ITSM platform. Serviceaide's operations are geographically diversified.

For GenAI, Serviceaide utilizes OpenAI GPT and Google Gemini. Recent product enhancements include adding knowledge article generation and natural language queries for accessing ITSM data. Future product development plans include image recognition, data masking and AI-driven skills gap detection.

### **Strengths**

- **Midmarket fit:** The entry-level pricing for the end-user self-service use case featuring virtual support agent includes LLM costs and is affordable for midmarket buyers.
- **Answer accuracy:** Serviceaide's Luma AI virtual support agent is well-suited for end-user self-service because of its ability to use a knowledge graph to optimize responses and minimize hallucinations.
- **Multiproduct strategy:** Serviceaide's two-pronged approach of offering an AI solution that centers on its ITSM platform, and a stand-alone virtual support agent that can be integrated with competing ITSM platforms, has helped it adapt to changes in the market.


### **Cautions**

- **Limited capacity for innovation:** Serviceaide's roadmap does not provide sufficient detail on how it will meet the evolving needs of AI in ITSM. Relative to its competitors, Serviceaide has limited capacity in R&D to allocate to new solutions, and this constraint risks it falling behind in this market.
- **Modest sales capacity:** Serviceaide maintains a small sales force and a relatively small number of partners that sell its product, which has resulted in limited impact and penetration in this market.
- **Immature product support:** Serviceaide does not provide standard service levels and offers limited training on GenAI, which places a greater burden on its customers to support the product.

### **ServiceNow**

ServiceNow is a Leader in this Magic Quadrant. Launched in 2018, ServiceNow's AI application in ITSM is composed of AI features in its ITSM platform, specifically ServiceNow IT Service Management Professional and Professional Plus. It is designed to work alongside its own ITSM platform. ServiceNow's operations are geographically diversified.

For GenAI, ServiceNow utilizes its own Now LLM (based on Mixtral and other LLMs), or customers can bring their own model with integrations into Microsoft Azure OpenAI, OpenAI GPT, Google Gemini and IBM watsonx. Recent product enhancements include adding automated knowledge article generation and chat summarization for its virtual support agent. Future product

development plans include enhancing incident cluster summarization, expanding AI search with additional knowledge sources, and text-to-playbooks for common agent task automation. 

### **Strengths**

- **Customer reach:** ServiceNow's dominant market presence in ITSM platforms gives it an incumbent advantage to position its platform-native AI to a significant number of customers via numerous targeted marketing campaigns.
- **Well-rounded product roadmap:** ServiceNow maintains a 36-month product roadmap for the AI applications in ITSM market, which addresses a wide range of functional areas with its planned enhancements.
- **Ample research and development:** Through a series of AI-related acquisitions and organic growth, ServiceNow has a large R&D headcount, providing it with the resources to deliver future capabilities within this market.

### **Cautions**

- **High cost:** ServiceNow's GenAI capabilities are available only through an upgrade to its Professional Plus tier. This represents a potentially significant additional cost compared with the standard subscription before implementation and management overheads are considered.
- **Complex configuration:** To achieve good AI search results, customers may need to create synonyms and results improvement rules using low-code configurations. This can be complex for I&O teams without additional training or assistance.
- **GenAI feature gaps:** ServiceNow has lagged some competitors in optimizing its LLMs across a wide set of needs, such as through an agent-facing operations assistant or generating on-demand communications.


### **SymphonyAI**

SymphonyAI is a Niche Player in this Magic Quadrant. Launched in 2019, SymphonyAI's AI application in ITSM is composed of SymphonyAI Apex Enterprise IT Copilot and SymphonyAI Digital Agent. It is designed to work alongside its own ITSM platform, SymphonyAI IT Service Management, and third-party ITSM platforms. SymphonyAI's operations are geographically diversified.

For GenAI, SymphonyAI utilizes Microsoft Azure OpenAI. Recent product enhancements include conversational AI reporting and additional third-party chat agent support, including Google Chat, Slack and Microsoft Teams. Future product development plans include enhancing its GenAI security, multimodal input support and custom-trained LLMs for industry-specific needs.

### **Strengths**

- **Scalable pricing:** SymphonyAI provides a flat product pricing model that is based on the number of users. This makes its costs more predictable for buyers that expect to scale up their use.

- **AI platform synergy:** SymphonyAI has a broad investment of R&D in a multipurpose GenAI platform. This provides it with opportunities to scale investments and quickly develop enhancements to its AI application for ITSM product. 
- **Vertical fit:** SymphonyAI's broad portfolio of adjacent industry-specific products and balanced customer presence shows its adaptability and ability to appeal to a broad set of clients across industries.

### **Cautions**

- **Limited market understanding:** SymphonyAI views this market more as the ITSM platform market with automation opportunities. It has demonstrated a comparatively limited understanding of the AI applications in ITSM market.
- **Undifferentiated roadmap:** SymphonyAI's future AI roadmap for AI applications in ITSM is largely composed of enhancements to existing functionality, rather than introducing net new features. As a result, it risks falling behind in this market.
- **Inadequate documentation:** Outside of SymphonyAI's virtual support agent, nearly all AI features were released during or after November 2023. Given the recent release, many new features were found to be lacking support documentation.

## **Inclusion and Exclusion Criteria**

To qualify for inclusion, providers must meet all of the following criteria:

- The AI application for ITSM product must generate advice or actions on ITSM practices (including at least incident management, service request management, problem management and change management) using AI- and machine-learning-assisted analysis of ITSM data and metadata. The product must use ITSM case data and ITSM metadata.
- The AI application for ITSM product must include at least five of the nine standard features of this market (virtual support agent, public knowledge discovery, intelligent escalation, intelligent risk advisory, intelligent triage, intelligent categorization, intelligent swarming, major incident detection and problem detection). Each of these features must:
  - Be generally available to customers as of 1 January 2024
  - Be fully supported by the AI application for ITSM vendor, even when third-party technology is used to deliver the functionality
  - Be in active production use by at least 10 customers
- The AI application for ITSM product must have been commercially available and marketed since 1 January 2024.
- For the period 1 January 2023 through 1 April 2024, the provider must have at least 10 active paying customers that are using the product in a production environment. Each of these customers must either:



- Spend \$100,000 annually and explicitly on AI for ITSM features, or
- Have 100 IT workers actively using agent advisory features (intelligent escalation, intelligent risk advisory, intelligent triage, intelligent categorization and/or intelligent swarming).
- All features applicable to this inclusion criteria and evaluated in this Magic Quadrant and Critical Capabilities research must be generally available as of 1 January 2024 to all customers and fully documented. Custom development for specific customers will not qualify.

## Evaluation Criteria

### Ability to Execute

#### Product or Service

This part of the evaluation primarily examines the provider's ability to meet the critical capabilities of AI applications in ITSM. Also evaluated is the product's user experience, ease of use, security/privacy features and integrations to other related products (such as ITSM platforms).

#### Overall Viability

This part of the evaluation primarily examines the provider's product revenue and other funding to support the growth and continued investment of AI applications in ITSM. Also evaluated is the amount of dedicated staff reserved for product development.

#### Sales Execution/Pricing

This part of the evaluation primarily examines product bundling and pricing approaches, the ability to extend deals with bundled and/or additional professional services, and the overall effectiveness of the sales channel. Also evaluated is the comparative cost of the product against comparable offerings from competitors and how this is perceived by customers.

#### Market Responsiveness/Record

This part of the evaluation primarily examines the speed and cadence of product releases, and the provider's ability to get features specific to AI applications for ITSM to market. Also evaluated is the success rate of getting customers to actively use these features.

#### Marketing Execution

This part of the evaluation primarily examines the impact of product marketing campaigns over a variety of channels, and their relevance to customer needs. Also evaluated are the resources that the provider has dedicated to marketing the product.

#### Customer Experience

This part of the evaluation primarily examines the assistance and guidance provided to customers, as well as the flexibility of LLM training and migration. Also evaluated is the general onboarding and offboarding experience and implementation effort. Customer feedback from

sources including – but not limited to – Gartner Peer Insights and client/expert interactions are taken into consideration.



## Operations

This part of the evaluation primarily examines the ability of the provider to support and maintain the product along with its infrastructure. Also evaluated is the ability of the provider to maintain the performance of the system as it grows.

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

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

Source: Gartner (October 2024)

## Completeness of Vision

### Market Understanding

This part of the evaluation examines the ability of the provider to address present and future customer priorities for the use cases of AI for end-user self-service, AI for ITSM practitioners and AI for ITSM practice leads. Also evaluated is the provider’s understanding of this market and which customers they need to target to be most successful with their product.

## Marketing Strategy



This part of the evaluation examines the ability of the provider to reach targeted buyers with differentiated

messaging. Also evaluated is the ability to message effectively to the use cases of AI for end-user self-service, AI for ITSM practitioners and AI for ITSM practice leads.

## Sales Strategy

This part of the evaluation examines the provider's ability to gain customers with its sales force and partners, and how it directs prospects to the optimal sales channel for the customer type and location. Also evaluated is how the provider identifies opportunities to drive future growth.

## Offering (Product) Strategy

This part of the evaluation examines the ability of the provider's product roadmap to address both the short- and long-term needs of customers. The length and content of the roadmap is evaluated, including its relevance to product enhancement requests.

## Business Model

This part of the evaluation primarily examines the provider's growth strategy, value proposition, and synergies across adjacent products and services.

## Vertical/Industry Strategy

This part of the evaluation primarily examines the provider's ability to enable customers in specific industry segments to meet necessary compliance. The ability to provide vertical-specific messaging that targets those buyers and buying plans or discounts for sectors such as public sector or not-for-profit customers. Also evaluated is the focus on end-user organizations versus other high-tech and managed service provider (MSP) organizations.

## Innovation


This part of the evaluation examines the ability of the provider's R&D division to sufficiently focus on the AI applications for ITSM market and adequately resource its development. Also evaluated is the focus on internal innovation (including patents to protect native IP) versus partnering with other tech providers.

## Geographic Strategy

This part of the evaluation primarily examines the provider's global resources, including offices, partners, data centers and language support. Also evaluated is the provider's customer presence in each region.

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



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

Source: Gartner (October 2024)

## Quadrant Descriptions

### Leaders

Leaders have executed well with broad market reach, strong customer awareness of their participation in this market, and adoption (as evidenced by Gartner client interaction data, as well as their growth and market presence). Leaders have a clear vision in roadmaps that exploit relevant opportunities and address challenges of using AI and generative AI in ITSM across multiple use cases. Leaders exhibit the levels of product, marketing and sales capabilities required to drive market acceptance.

### Challengers

Challengers have executed well, growing market revenue and driving sufficient customer awareness to participate with competitive providers. In general, however, Challengers are not seen as driving market innovation as strongly as Leaders or Visionaries. This is typically a result of the

provider prioritizing in their roadmaps adjacent markets, such as conversational AI solutions or ITSM platforms.



## Visionaries

There are currently no visionaries in this market. Visionaries deliver an innovative approach to the market that addresses differentiated and/or future opportunities for exploiting AI in ITSM, such as natural language case extraction or knowledge generation. However, they have yet to execute as well as Challengers or Leaders. Visionaries have a differentiated message and product strategy that resonates with buyers' developing needs.

## Niche Players

Niche Players in this market have strengths in particular areas of AI in ITSM and often offer solid capabilities for a specific use case, but generally have not invested in satisfying all the requirements to demonstrate Completeness of Vision and the Ability to Execute. Established providers in this quadrant may treat AI applications for ITSM as an add-on or exploratory expansion to their established markets, such as conversational AI solutions or ITSM platforms. The Niche Players in this Magic Quadrant are in the process of ramping up go-to-market efforts and have yet to develop the vision to break out.

## Context


The goal of any Magic Quadrant is to provide a level view of comparable vendors (size, capability and corporate structure) to address the demands of a wide variety of buyers. Not every company's requirements are identical. We encourage clients to review the accompanying [Critical Capabilities for Artificial Intelligence Applications in IT Service Management](#) research for use case and functionality requirements, and this Magic Quadrant research to align industry expertise, vision, technology and cost requirements with the right vendor, regardless of the vendor's quadrant. Buyers should evaluate providers against specific outcome-driven requirements rather than expecting a fully capable end-to-end solution.

Gartner provides context to help buyers understand features in relation to potential business outcomes in [Use-Case Prism: Artificial Intelligence for IT Service Desk](#).

## Market Overview

I&O leaders seek the benefits of AI to maximize the value of their ITSM, but are not replacing ITSM platforms to obtain AI capabilities. Instead, they choose between incumbent platform capabilities and third-party, specialist AI solutions. Commoditization and lack of differentiation in the ITSM platforms market triggered the retirement of the Magic Quadrant for IT Service Management Platforms. This was replaced in 2023 by [Market Guide for IT Service Management Platforms](#). Rather than use AI capabilities to artificially extend the life cycle of the ITSM platforms market, a new market was required to better align with the marketplace and buying patterns.

This resulted in the AI applications for ITSM market, which incorporates a broad range of vendors and their AI-enabled products. This new market is evolving rapidly (see [Hype Cycle for ITSM, 2024](#)) alongside developments in generative AI and large language models (LLMs).

The approaches to LLMs vary among vendors in this market, with some providing heavily customized models and others simply offering gateways into public models. While proprietary models offer potential for fine-tuning and specialization, public LLMs offer comparable results for common actions, such as public knowledge discovery and case summarization. 

I&O leaders commonly go after end-user self-service for applying AI applications without exploring broader opportunities to strategically address gaps within their ITSM roadmaps. This risks missed potential of applying AI to optimize practices, drive greater efficiency, reduce costs and improve agility within I&O.

AI and GenAI solutions are emerging in many other markets, and several of those can be used for the benefit of ITSM, as well as many other workflows and situations. The differentiating aspect of AI applications is that ITSM data and metadata are the primary sources that these solutions require to operate. AI applications for ITSM use ITSM data and metadata as the primary data source. There are several other solutions from overlapping and adjacent markets that offer AI capabilities that can be used for these use cases, but they have other primary data sources and are not dependent on ITSM workflows. The other overlapping and adjacent markets are event intelligence solutions (also known as AIOps platforms), conversational AI solutions, digital employee experience (DEX) tools, and security information and event management (SIEM) solutions.

This is a new Magic Quadrant, which replaces [Market Guide for Artificial Intelligence Applications in IT Service Management](#).


## Acronym Key and Glossary Terms

cluster analysis	Cluster analysis, also known as clustering, is the process of categorizing a collection of data objects into distinct groups, referred to as clusters. The primary objective is to ensure that objects within the same cluster are more alike to each other than to those in other clusters.
generative AI (GenAI)	Generative AI techniques learn from representations of data and model artifacts to generate new artifacts.
large language model (LLM)	Large language models are AI foundational models that have been trained on vast amounts of unlabeled textual data. Applications can use LLMs to accomplish a wide range of tasks, including question answering, content generation, content summarization, retrieval-augmented generation (RAG), code generation, language translation and conversational chat.

## 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.

**Expérience client :** relations, produits et services/programmes qui permettent aux clients de réussir avec les produits évalués. Cela inclut notamment la manière dont les clients reçoivent un support technique ou un support de compte. Cela peut également inclure des outils auxiliaires, des programmes de support client (et leur qualité), la disponibilité des groupes d'utilisateurs, des accords de niveau de service, etc.

**Opérations :** Capacité de l'organisation à atteindre ses objectifs et à respecter ses engagements. Les facteurs pris en compte sont notamment la qualité de la structure organisationnelle, notamment les compétences, les expériences, les programmes, les systèmes et les autres moyens qui permettent à l'organisation de fonctionner efficacement et de manière continue.

## Exhaustivité de la vision

**Compréhension du marché :** capacité du fournisseur à comprendre les souhaits et les besoins des acheteurs et à les traduire en produits et services. Les fournisseurs qui font preuve du plus haut degré de vision écoutent et comprennent les souhaits et les besoins des acheteurs et peuvent les façonner ou les améliorer grâce à leur vision ajoutée.

**Stratégie marketing :** un ensemble de messages clairs et différenciés, communiqués de manière cohérente dans toute l'organisation et externalisés via le site Web, la publicité, les programmes clients et les énoncés de positionnement.

**Stratégie de vente :** stratégie de vente de produits qui utilise le réseau approprié de ventes directes et indirectes, de marketing, de services et de communication affiliés qui étendent la

portée et la profondeur de la portée du marché, des compétences, de l'expertise, des technologies, des services et de la clientèle.



**Stratégie d'offre (produit)** : l'approche du fournisseur en matière de développement et de livraison de produits qui met l'accent sur la différenciation, la fonctionnalité, la méthodologie et les ensembles de fonctionnalités en fonction des exigences actuelles et futures.

**Modèle commercial** : la solidité et la logique de la proposition commerciale sous-jacente du fournisseur.

**Stratégie verticale/sectorielle** : stratégie du fournisseur visant à orienter les ressources, les compétences et les offres pour répondre aux besoins spécifiques des différents segments de marché, y compris les marchés verticaux.

**Innovation** : Dispositions directes, connexes, complémentaires et synergiques de ressources, d'expertise ou de capital à des fins d'investissement, de consolidation, de défense ou de prévention.

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

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