

Magic Quadrant for Project and Portfolio Management

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Continuous delivery is driving more PPM leaders to connect aligned strategic business investments with diversified, changing delivery focused on time to value. This Magic Quadrant evaluates PPM providers offering technology to support these endeavors.

Strategic Planning Assumptions

By 2023, 80% of organizations will have an enterprise project, program or product management office (PMO) focused on integrating digital products and programs.

By 2021, at least 40% of large enterprise IT organizations will have completed their implementation of a product-centric approach.

By 2023, 65% of organizations that moved to product-centric delivery will have embedded their digital product managers in a business area.

By 2023, technology providers focused on artificial intelligence (AI), virtual reality (VR) and digital platforms will disrupt, and elicit a marked response from, the traditional providers within the project and portfolio management (PPM) market.

Market Definition/Description

ContinuousNext (see Note 1) is driving the need for PPM leaders to apply more diverse combinations of PPM tools, capabilities and consulting services to support the needs of today's enterprises. ¹ Scaling digital business requires PPM leaders to adopt new approaches to strategic planning and execution, and drive successful business transformation initiatives and programs. PPM leaders must adopt simplified ways to use multiple types of PPM tools to support both decision making and execution without introducing technology redundancy.

Before applying any PPM technology, PPM leaders must first identify themselves with at least one of the evolving types of management organizations or groups that best defines the role that the PPM function is intended to play in their enterprise. Understanding the types of organizations or groups that the PPM technology is supposed to benefit can help PPM leaders determine which vendors and PPM technologies best fit their specific use case. These entities include:

- Strategy realization office (in some use cases)
- Business or digital transformation office

- Enterprise portfolio office
- Enterprise program and project capability center
- Reporting enterprise program management office
- PMO
- Collaborative work management teams or groups

Once PPM leaders understand the makeup of their management organization and their specific use cases clearly, they can turn to the PPM market for supporting technology. The estimated \$3.1 billion PPM market represents a variety of existing and emergent PPM submarkets. ² It is a strong market, but one that is commoditizing in some areas and diversifying in others simultaneously. The market is also polarizing, with clear distinctions between standardizing strategic portfolio decision making and management and diversifying execution methods and approaches based on time to value.

Connecting strategy and execution for true alignment is also as equally important now as allowing these two main PPM functions to operate independently from one another when appropriate. This is driving a natural proliferation of complementary PPM tools supporting both the strategic and execution activities playing out as part of digital business.

New PPM Market Challenges

The latest digital trends are presenting some clear challenges to the PPM market, and these challenges have yet to be met. There are new, emergent approaches to both strategic planning and execution requiring more innovative PPM technology. Demand for the latest digital technologies (e.g., AI, robotic process automation [RPA]) in all enterprise software markets is also applying pressure to providers in the PPM market.

Digital technology challenges for the PPM market include:

- Strategy-to-execution alignment and management
- Standardized enterprise portfolio decision making connected to diversified execution and delivery
- Continuous change
- Supporting the shift from project-based management to digital-product-based management
- Funding and resourcing agile investments at the portfolio level
- Funding and resourcing digital products at the portfolio level
- AI-enabled PPM technology, including conversational AI and machine learning (ML)

■ RPA-enabled PPM technology

PPM market providers recognize these challenges and are reacting to them in many ways, but are doing so incrementally, as opposed to delivering major releases of functions in these areas. As PPM evolves in its best practices to support scaled digital business, so too will the PPM vendors and technologies available in the market. ³

Established PPM vendors are investing in new combinations of product capabilities and/or acquiring other PPM-related vendors and products to meet these varied needs. Pricing models are beginning to change to better suit customer needs and provide more flexibility in the usage of different types of licenses and functionality. AI and RPA are being explored by providers for later infusion into their existing product offerings. Customers and prospects, however, are clamoring for these things now.

Prospective PPM tool customers should look carefully at the market defined by this Magic Quadrant research to determine what part of their needs the products discussed will meet. However, they should also consider other Gartner PPM market research covering PPM software submarkets (e.g., strategy execution management, low-cost project management tools) to address all PPM use cases in their organization. Organizations moving aggressively toward ContinuousNext and scaled agile constructs may need to look beyond these traditional players to complete a technology profile that covers digital business comprehensively.

Portfolio Versus Execution Configurations

At the portfolio level, PPM leaders are interested in aligning and prioritizing the contributions they make and the work they do with value markers defined by business leaders. Those markers include strategy realization, positive business outcomes, transformed business and operating models, and the resolution of persistent business challenges. PPM technology configured for portfolio management can support many of these interests, but might also require augmentation with technologies that complement the portfolio management function.

At the execution level, PPM leaders are interested in diversifying their use of traditional and alternative work and project execution methods. They wish to reduce overall project durations, promote continuous customer responsiveness and satisfaction, and base any execution approach they apply to varied work efforts on the business's perceived time to value for those efforts. If agile tooling is already employed for agile and iterative work – for example, Atlassian Jira, Broadcom (CA Technologies) Rally and CollabNet VersionOne – then integration of this tooling with a PPM technology is now a priority requirement.

Standard Use Cases and Critical Capabilities

New approaches toward executing transformational initiatives in the midst of ContinuousNext drive a variety of distinct PPM technology needs. The proliferation of submarkets for PPM is a direct reflection of these differing technology needs and respective use cases we see among teams, departments and enterprises seeking out PPM software. In response, the PPM market

continues to grow and expand to support a variety of PPM use cases involving different types of user groups, each of which has its own distinct goals and challenges.

Gartner specifically defines four distinct PPM use cases in our Critical Capabilities research, including IT PPM, enterprisewide PPM, reporting PPM and collaborative PPM.

PPM capabilities identified as essential or critical include:

- Project demand management
- Project planning and management
- Time management
- Resource management
- Resource capacity planning
- Project portfolio management
- Project collaboration
- Program management
- Reporting services
- Security and user management
- Integration
- Usability

Risk management and change management are also important capabilities but are not specifically measured in our PPM Critical Capabilities research as major items; rather, they are covered as underlying capabilities by some of the ones included in the list above.

PPM vendors apply several different approaches to providing PPM critical capabilities in the four distinct PPM use cases. Many are compelled to provide a broad set of PPM software products achieved largely through mergers and acquisitions (M&As). Others offer one product and focus on developing and extending it directly, and/or integrating it with other tools and software products, to cover the new needs that their base products cannot cover.

PPM software providers covered under this market definition aim to support the selection, planning and execution of a variety of different work packages or containers, including traditional waterfall projects, as well as iterative and agile projects. Comprehensive support for the management of digital products is still in a very early stage.

PPM providers often fold in collaboration and communication capabilities, and allow work teams and project offices to report, monitor and identify course correction in resource-intensive

project and work environments. Providers included in this Magic Quadrant offer these capabilities directly through their own products, but frequently recognize that specific integration points may also be needed to connect niche tools or data sources.

AI- and RPA-Enabled PPM

ContinuousNext requires PPM best practices to evolve toward continuous and adaptive strategic and operational planning, streamlined and efficient communication, and rapid and continuous execution. ⁴ Without also evolving the enterprise's PPM technology foundation to support these modern best practices, increasingly intolerable levels of administrative overhead begin to surface, leaving little or no room for innovation.

Currently, PPM leaders struggle to avoid this situation or find modern technologies to optimize and support the new roles, responsibilities and delivery methods of their PPM function. Applying AI to PPM-enabling technologies and disciplines appears to be a promising answer to this struggle, and yet the PPM market is in an embryonic stage as it relates to AI-enabled PPM. ⁵

End-user fatigue is also officially setting in as PPM leaders and project professionals are expected to interact with, update and share information with many or all of these different tools and technologies. A change or update that a PPM end user must make to one software system or tool could require additional logins and keying of information into others. Traditional APIs and hard-coded integration approaches are not enough to reduce the amount of time that PPM leaders and project professionals must spend logging in and out of and updating multiple systems used for PPM.

RPA can remedy the many integration inefficiencies found among the tools and technologies used for PPM in enterprises investing in digital business. RPA investments among digital leaders will spike in the next few years and, by 2022, enterprise software vendors will provide strong AI- and RPA-enabled options in their technology offerings for customers. The PPM market must also follow suit. Currently, however, the PPM market is in the very early stages of providing RPA-enabled PPM.

Magic Quadrant

Figure 1. Magic Quadrant for Project and Portfolio Management



Source: Gartner (May 2019)

Vendor Strengths and Cautions

Broadcom (CA Technologies)

Broadcom (CA Technologies) provides one flagship PPM product, Clarity PPM, with on-premises and SaaS deployment options. A second product, Broadcom Rally, provides an agile development tool that can be purchased as a stand-alone tool or integrated with Broadcom Clarity PPM.

Strengths

- To provide more flexibility and choice for its larger-size customers, Broadcom introduced a new pricing and licensing model. The new model allows customers to shift license types from

team members to power users. Additionally, customers no longer need to predict a fixed set of different types and amounts of licenses before they buy, as this newer model is based on, and allows for, varied consumption.

- Broadcom continues to transform the Clarity PPM user experience, infusing the entire product with a modern UX lauded by customers and end users, including team members, project managers and portfolio managers.
- Out-of-the-box integration between Clarity PPM and Broadcom Rally allows customers to standardize on portfolio-level communication, strategic alignment and decision making, while also supporting both waterfall and agile approaches to work management. The integration also allows Clarity to organize the funding of agile work.

Cautions

- Broadcom's Clarity PPM is robust and comprehensive, and supports many different roles for PPM. The strength of the product and cost, however, might not always meet the needs of small or midsize PPM environments.
- Broadcom recognizes the need to continue to provide customer relationship touchpoints for Clarity PPM's large installed base. Customers may experience impacts related to customer service, as Broadcom transitions CA Technologies' sales and support functions to support its overall strategy.
- Broadcom PPM products currently lack AI features like conversational AI and ML. These would allow PPM leaders and project professionals to reduce the amount of manual data entry required to feed Clarity PPM and query information from it, or reduce the amount of manual planning required to use the product effectively.

Cerri

Cerri provides two PPM products, Genius Project and Cerri Apps, with on-premises and cloud-based options for each.

Strengths

- Cerri introduced Cerri Apps (Cerri), a collaboration platform consisting of a series of applications (e.g., Task, Central and Calendar) to provide a more collaborative and agile work experience for users. This provides a foundation for its increasing agile and mobile work management support.
- Genius Project is mainly suited for small and midsize businesses. The addition of Cerri applications will further extend Cerri's appeal to users requiring a lighter-weight, yet functional, experience.
- Cerri is currently modernizing Genius Project by moving it off of its legacy architecture and enabling better performance and usability.

Cautions

- Currently, neither Genius Project nor Cerri applications support integration with third-party, agile-friendly products, such as Atlassian Jira or CollabNet VersionOne. As Cerri focuses its attention on building software technologies facilitating collaborative work, it must also support integration to these types of third-party agile work applications.
- Cerri is very focused on improving and accelerating its product development efforts. As this evolves, the vendor is expected to introduce products on more modern architecture. This will require it to invest more readily in migration services and support for existing customers, and to ensure that there is enough support personnel to help the customer base move to a more modern PPM product set.
- Cerri is in the midst of transitioning away from its existing legacy architecture in an effort to expedite innovation in other areas (e.g., chatbots, AI, ML). Until this transition is completed, support for AI-enabled PPM will not be readily available in its PPM products.

Changepoint

Changepoint offers two main PPM products supporting the needs of its customers and prospects. Daptiv PPM is a cloud-based service, and Changepoint, its namesake product, offers on-premises and private cloud deployment options.

Strengths

- Changepoint has introduced Daptiv Connect, a cloud-based integration platform powered by Dell Boomi allowing Daptiv PPM to connect to third-party applications and offered for a flat annual fee. Changepoint manages and maintains these integrations for its customers as a service, rather than relying on third-party partners to build one-off integrations using a standard API.
- Changepoint aligned its PPM and enterprise architecture (EA) products into an Enterprise Portfolio Management (EPM) offering, which provides customers adopting agile program and product management with continuous planning capabilities tightly integrated with multimode work execution.
- Changepoint introduced an improved resource management capability that enables workforce planning for enterprises. This allows customers to engage in continuous planning and drives faster execution, while ensuring effective resource utilization and financial visibility.

Cautions

- Changepoint is taking initial steps to respond to increasing market demand for a more modern PPM technology UX, such as AI-driven visualization, natural language processing (NLP) and ML. Currently, however, Changepoint products do not yet provide robust AI-enabled PPM.

- Changepoint products can be configured to handle multiple work methods, including agile and waterfall. But as PPM increasingly shifts from a project focus to a resourced digital product approach, the vendor will need to add this support to its products for customers engaged in the shift.
- Changepoint and Daptiv offer strong capabilities in project and portfolio management. But as digital transformation leads to more overarching business programs affecting enterprises, Changepoint will need to improve its support for program management in its PPM products.

Clarizen

Clarizen provides three cloud-based PPM products: Clarizen One (formerly Clarizen), Clarizen Go and Clarizen Eagle.

Strengths

- Clarizen amended its PPM product portfolio to address additional uses cases and address a broader set of needs across the enterprise. In addition to Clarizen One, the vendor now offers Clarizen Go, which targets agile- and team-based work management. Clarizen Go integrates directly with Clarizen One to provide team progress updates. Another new product, Clarizen Eagle, offers strategic portfolio-level management and alignment to work performed in Clarizen One, and can also be sold as a stand-alone solution.
- Supporting its executive-level end users, Clarizen One now includes Slide Publisher, which can be used to expedite the creation of executive-ready presentations that provide summary-level status updates based on user-defined templates and preferences.
- As an initial step into AI-enabled PPM, Clarizen One includes Clarizen Bot, an integration with Slack or Microsoft Teams that uses bot technology. Clarizen Bot leverages NLP to enhance personal productivity, by identifying actions for completion for end users (e.g., time entry for appropriate tasks) as well as smoother tool navigation.

Cautions

- As the use of tools to support both the process and the system of strategy execution continues to evolve, the vendor will need to accelerate the enhancement of Clarizen Eagle's integration capabilities in this increasingly competitive space.
- While Clarizen Go is a move in the right direction to support the increasing needs for team collaboration and engagement, Clarizen will need to improve the UX and user satisfaction with its base mobile application for Clarizen One.
- Clarizen leverages customer feedback to provide more modern, cleaner screen presentations, and the look and feel of Clarizen One. Further improvements to Clarizen One's UI, specifically in areas such as the general presentation of tool features and more simplistic views for presenting project information, would benefit customers and end users.

KeyedIn

KeyedIn offers one main PPM product, KeyedIn Projects.

Strengths

- KeyedIn Projects offers users the flexibility to configure their project workflows, gating and approvals based on preconfigured project types supporting varied work and delivery methodologies (e.g., waterfall and agile configurations), using a Kanban approach.
- KeyedIn Projects' reporting API enables point-and-click integration and allows users to build simple queries to expose data that can be consumed by JSON-compatible business intelligence and reporting tools.
- With primary installations in small and midsize enterprises, KeyedIn Projects can be configured in ways that support ease of use among end users who might not be PPM technology power users or experienced in the use of project management software.

Cautions

- KeyedIn Projects provides users with the ability to categorize projects by project type, thus allowing for various types of governance workflow. KeyedIn Projects does not yet support advanced capabilities relative to resourced digital product portfolio management.
- KeyedIn Projects does not yet support AI-enabled PPM or RPA for its customers.
- While there has been an emphasis on providing users with added flexibility for configuration and reporting, KeyedIn should not avoid scaling to continue to provide the professional services that have been applauded by users in the past.

Micro Focus

Micro Focus provides one main PPM product, Micro Focus PPM, with on-premises and cloud-hosted deployment options.

Strengths

- Micro Focus is responding to customer demand for continuous strategic portfolio management by providing a tight connection between tools used for agile and other work management and its portfolio management capabilities. It also provides the ability to track digital products at the portfolio level to manage funding and resources without having to go directly into an agile tool.
- Micro Focus improved the look and feel of its PPM product with a more modern UX, including new charting and graphics libraries enabling a new dashboard system. This allows for easier user configuration and additional out-of-the-box content with new chart types.
- Micro Focus PPM includes evolving enterprise agile support, by allowing users to define strategies using its portfolio management features, analyze various portfolio scenarios based

on value metrics and potential benefits realization, and advance approved work packages for detailed execution.

Cautions

- Micro Focus PPM only supports mobile accessibility natively and does not yet offer a mobile application available on Google Play or in the Apple Store.
- Micro Focus continues to evolve its SaaS strategy. However, a significant portion of the Micro Focus PPM installed base remains on on-premises deployments. For Micro Focus customers interested in adopting or migrating to a public cloud-hosted deployment, be aware that the vendor is still building its expertise in these new environments.
- As customers shift from project-based to digital-product-based methods, Micro Focus will need to continue to evolve its support for collaborative delivery teams. Micro Focus released its initial capabilities in this area in February 2019, and more features are slated for future releases. Currently, however, these new capabilities are in the early stages of adoption by customers.

Microsoft

Microsoft provides two main PPM products, Microsoft Project Server (on-premises solution) and Microsoft Project Online (cloud-based, hosted by Microsoft in Office 365). Other PPM products include Microsoft Project, Microsoft Planner and Microsoft Teams.

Strengths

- Microsoft is strengthening its messaging to customers and its partner network to reduce complexity and confusion on how to implement and leverage its PPM technologies. This includes helping customers more easily understand how to combine and configure the various Microsoft PPM components to meet specific PPM and business needs.
- Microsoft PPM offerings allow users to evaluate the impact of unplanned work on portfolios of programs and projects. Users can capture and track formal project or work change requests, and assess the impact of these changes on work, durations, costs and resources.
- Microsoft introduced a new platform it calls Project Service, promising a modern approach to work management. This evolving product leverages and integrates with different Microsoft components, such as Microsoft Flow, Microsoft Teams, Microsoft Planner and Microsoft Project Online, in a more modern way.

Cautions

- Microsoft's new Project Service is relatively new and untested in the marketplace. Existing and new Microsoft Project Online customers will have access to Project Service as part of their Project Online subscriptions. These customers should refrain from overly customizing

(rather than configuring) their use of Project Online until the two offerings are combined into one platform and unified UX.

- Microsoft offers many PPM-enabling products and options for its customers, especially project managers who want to successfully manage and report on their projects. However, continued customer feedback indicates that Microsoft must improve its customer support specifically for PMOs and enterprise PMOs (EPMOs). Navigating the many PPM technology options Microsoft offers can be confusing for PMOs and EPMOs interested in exploring how they can automate PPM using Microsoft products.
- Project Online offers strong capabilities for named resource management at the detailed project and execution levels. However, dynamic resource management at the portfolio level, with the ability to create multiple scenarios and assess potential positive or negative impacts, would be a welcome addition that could expose macrolevel budget and schedule risks.

One2Team

One2Team offers one main PPM product, One2Team.

Strengths

- One2Team provides improved resource management and capacity planning capabilities with the inclusion of an additional module that allows One2Team customers to perform capacity management, what-if analysis and dynamic replanning independent of, and without impacting, the product's role as a PPM execution system of record.
- One2Team now offers preconfigured options for new product innovation (NPI), telecommunications (e.g., infrastructure rollouts) and IT PPM. This allows customers to expedite their implementations, while also allowing configuration supporting the specific PPM needs and varied use cases of an enterprise.
- To support the provision of real-time information and enablement of collaboration across both the execution level and portfolio level of PPM, One2Team now offers what-if analysis capabilities for building and comparing alternative portfolio scenarios.

Cautions

- One2Team is transitioning from managing 100% of its implementations with internal staff to using select implementation partners to support growth in underserved markets. As One2Team continues to scale, it must invest in more formal onboarding, training and collaboration with implementation partners to avoid dampening its reputation for customer responsiveness.
- One2Team is making incremental investments in pursuing North American markets and must continue to do so to strengthen its brand, and marketing and sales execution, in this region.
- One2Team does not yet provide PPM-enabled AI and RPA as part of its PPM offering.

ONEPOINT Projects

ONEPOINT Projects offers one main PPM product, ONEPOINT Projects.

Strengths

- ONEPOINT continues to build on its strength in bidirectional integration with Atlassian Jira. ONEPOINT Projects' Jira integration now allows users to automatically synchronize custom fields, facilitating more modular planning for large or complex initiatives.
- Version 18 of ONEPOINT Projects demonstrates the vendor's commitment to improving the product's UI and usability. Version 18 includes an improved look and feel, with the addition of Kanban boards for building and managing to-do lists and activities, as well as improved work breakdown structure views.
- ONEPOINT Projects is attractive for small and midsize organizations, given its accelerated deployment durations and ease of use. A free trial option is offered so that prospective customers can test and apply the use of the product to a small subset of users before making a purchasing decision.

Cautions

- ONEPOINT Projects version 18 includes improved portfolio management capabilities such as scenario planning and an upgraded portfolio dashboard. While the provided capabilities may be appropriate for small and some midsize organizations, they might not always suffice for larger enterprises.
- ONEPOINT provides mobile support via ONEPOINT 360 and ONEPOINT ME (iOS only), but requires improved UI capabilities to better support those project stakeholders requiring robust mobile accessibility and support.
- ONEPOINT Projects does not yet provide AI-enabled PPM capabilities or support for RPA. These capabilities are in the early stages of development and will not be included in the product in the next 12 months.

Planisware

Planisware provides two PPM products, Planisware Enterprise and Planisware Orchestra.

Strengths

- Planisware Enterprise offers a collaboration feature for users, with a first-stop entry point called Workbox. The feature is part of the system's new UX, redeveloped in line with Google interface standards. Workbox lets users see, at a glance, a to-do list grouped by theme. From there, users can go directly to the pages where they can perform needed actions.
- Planisware's SaaS strategy has evolved so that it now owns and controls all of its application services and infrastructure across all the data centers used to support its cloud-hosted

customers. As a result, Planisware can directly ensure security, and it can accelerate change requests and incident response times as part of customer support.

- This year's 6.3 release of Planisware Enterprise introduces support for the Scaled Agile Framework (SAFe). With Planisware Enterprise, SAFe can fit alongside users' other methods (e.g., Scrum, Stage-Gate, hybrids like iterative waterfall). This flexibility allows users to accommodate various approaches to programs, projects, nonproject work and product enhancements, and to report on them all together in the portfolio.

Cautions

- Although Planisware continues to evolve its SaaS strategy, a significant portion of its installed base remains on on-premises deployments, largely due to the longevity of Planisware in this market and its high customer retention rate. The vendor's experience in cloud hosting is still maturing.
- Lengthy waterfall implementations have been a challenge for new Planisware customers. The vendor introduced a new approach it calls "Agile Implementation," which is based on the modules and features new users find most useful. However, Agile Implementation is an unproven approach and may not address new customers' priority needs if they do not actively direct the vendor's configuration efforts, and do not continue to iterate.
- Planisware is committed to its strategy for IT PPM, but Planisware Orchestra is a better fit for less-complex IT PPM use cases than Planisware Enterprise. Prospective Planisware customers addressing IT PPM should evaluate Planisware Orchestra. Planisware Enterprise is better-suited for enterprisewide PPM use cases, or in large IT organizations with advanced and complex requirements.

Planview

Planview offers a number of PPM-related products, including Planview Enterprise One (cloud-hosted) Planview PPM Pro (cloud-based), Planview Projectplace, Planview LeanKit and Planview Spigit.

Strengths

- Planview introduced a more modern pricing model for its customers, called Flex licensing. The Flex option allows customers to shift between different types of licenses and PPM capabilities at least twice during a contract year. Flex pricing allows Planview customers to shift their license usage from traditional waterfall-based project management to agile, iterative or collaborative work management licenses at no additional cost or penalty.
- Planview's portfolio of products recognizes the inevitability of tool proliferation in the enterprise by providing different tools to meet different project and portfolio management needs. With each acquisition, Planview continues to diversify the product options available to a variety of PPM use cases and needs.

- Planview's acquisition of Spigit gives the provider yet another product option for PPM customers interested in ideation and innovation management. Spigit will be integrated with a number of Planview's PPM products and contextualized to support idea capture in a number of PPM use cases.

Cautions

- Planview Enterprise One provides a strong portfolio management, work management and resource management platform for large enterprises. However, the vendor is quite aggressive in its M&A strategy, and customers and prospects may experience uneven levels of customer service and support as it executes on it.
- Planview has invested in modernizing its UX in Planview Enterprise One. However, the more modern UX is not yet completely infused throughout the product.
- Planview has yet to offer AI-enabled PPM support or RPA options for its customers.

Project Objects

Project Objects offers two PPM-related products, Project Objects and Needful.

Strengths

- Project Objects launched a new company called Uppwise to focus solely on the development and marketing of its agile PPM product, Needful. This allows Project Objects to manage and develop its foundational PPM product, Project Objects, separately from Needful, without compromising focus or the pace of innovation for either product.
- The Project Objects PPM product now includes a mobile team space accessible via mobile application available for both iOS and Android. This allows executives to access dashboards and team members to manage collaboration items using mobile accessibility.
- Project Objects is accelerating the promotion of its products and capabilities using various channels and by expanding its reseller partner base, placing specific emphasis on digital marketing strategy, using blogging, various forms of social media, its website and expanded telemarketing efforts. This will allow the vendor to better engage, deploy and support more customers in varied regions of the world.

Cautions

- Restful APIs are inherent in the Needful product, but adoption of them by customers is still in the early stages.
- Project Objects does not yet provide AI-enabled PPM or RPA options for customers in either of its PPM products.
- The Needful product currently supports only the English language. Support for additional languages is planned for subsequent releases.

Sciforma

Sciforma offers one PPM product, Sciforma.

Strengths

- Sciforma recently redesigned the work management capabilities of its PPM product to include more collaborative features, and inbox and Kanban views for managing issues, actions, deliverables and risks. Users can seamlessly move among views of business cases, projects, products, programs and portfolios.
- Sciforma version 7.1 now offers facilities for faster and easier setup, allowing more efficient and comprehensive configuration and deployment. Standard configurations can be completed in a few days for most customers. Additional features supporting global scalability across diverse work teams allow users to tailor modules and methods based on their needs.
- Sciforma's portfolio management capabilities now include features for budget-driven work and project ranking, with drill-down capabilities for portfolio-level simulation and impact analysis.

Cautions

- Sciforma does not yet support AI-enabled PPM or RPA options for its customers.
- Sciforma does not yet provide robust mobile accessibility to the product. However, plans to deliver initial capabilities in this area are slated for release some time later this year.
- While Sciforma deployments span enterprises of all sizes, it is more attractive for midsize enterprises with needs for PPM technology. The vendor continues to focus on improving product scalability and support for large, complex enterprise environments.

Sopheon

Sopheon offers one main PPM product, Accolade.

Strengths

- Sopheon introduced a new mobile application called Accolade Go. This application allows PPM teams to submit approvals, decisions, input and feedback directly from their mobile device to enable fast decision making and encourage more timely responses from PPM leaders.
- Sopheon improved the UX within Accolade, adding activity boards and card views of work for a more modern, graphical way to represent and manage work. New boards include a project team board that presents all the work of a specific team on a project. A work board graphically depicts all the work with a single stage or phase. There are also options for building customer boards.

- Sopheon introduced a new consulting deployment framework to improve client behavioral change. Called the Value Assurance Approach (VAA) framework, it provides an organizational behavior change methodology mapped to deployment processes.

Cautions

- Sopheon has strong capabilities supporting new product development (NPD) and enterprise portfolio customers, and offers a light IT PPM capability focused on business alignment. However, it has yet to demonstrate strength and deep experience in the traditional IT PPM use case.
- Sopheon's strength in NPD PPM should not be confused with the shift from project-based to resourced digital-product-based management. Sopheon has yet to demonstrate this capability and experience in helping EPMOs and PMOs support resourced digital product management.
- Sopheon made an initial investment in AI-enabled PPM by embedding a chatbot in Accolade, but user adoption is still in the early stages.

Upland

Upland offers two PPM-related products, PowerSteering and Eclipse.

Strengths

- PowerSteering provides top-down strategic planning supporting several use cases, including EPMOs, IT PMOs, business transformation initiatives, M&As and NPD. In addition, Upland offers an industry-specific preconfigured PPM option with Eclipse PPM that offers a migration path to PowerSteering as customers' maturity and requirements evolve.
- Recently enhanced PowerSteering capabilities allow users to view portfolio data and performance information using Upland Analytics. The Upland Integration Platform and Upland Analytics enable extensions to other enterprise data sources.
- Upland is in the process of leveraging its established Knowledge Management platform to power investments in AI and chatbot with PowerSteering, and to extend collaboration, stakeholder sentiment and user interaction capabilities.

Cautions

- Although PowerSteering includes a certified bidirectional integration from Atlassian Jira to the PowerSteering scheduling engine, customers often choose to configure this as a one-way integration to ensure data integrity.
- Upland's PPM products do not yet support the funding and sourcing of resourced digital products, while EPMOs and PMOs continue to shift in that direction.

- Although AI-enabled PPM is part of Upland's product roadmap, the vendor's products' AI or RPA options for customers are being developed on Upland's platform.

Workfront

Workfront provides one PPM product, Workfront.

Strengths

- In the vendor's quest to make the Workfront product the "operational system of record," it offers many options for integrating with third-party products, including an API, out-of-the-box connectors and Workfront Fusion's drag-and-drop, codeless connector.
- The Workfront mobile app offers a good baseline of core capabilities to enable an "anytime, anyplace" work experience for mobile users. Users can manage timesheets, create and update tasks, track projects, collaborate with other team members, and review and approve content.
- The vendor recently introduced Workfront Library, which is a digital content hub allowing users to create and access content (e.g., work products, deliverables, presentations). This enhances document sharing and reuse of the appropriate collateral for a given work initiative.

Cautions

- At its core, Workfront is a robust enterprise work management system. With recent development, Workfront highlights resource management enhancements to allow for global portfolio prioritization. Users should understand that, while this feature supports improved portfolio management, Workfront's overall portfolio management capabilities are not typically sufficient to support the needs of EPMOs.
- Workfront offers only one main PPM product in a market that is dictating requirements for multiple PPM tools designed for different purposes. Having only one product may limit Workfront's ability to address a number of varied additional PPM use cases and scenarios supported by the wider market using only one technology platform. However, Workfront's configurability accommodates different team and department work styles within the same environment.
- Currently, Workfront does not offer strong AI-enabled PPM or RPA options for customers.

WorkOtter

WorkOtter provides one PPM product, WorkOtter.

Strengths

- WorkOtter provides small and midsize organizations with streamlined PPM capabilities, and is an attractive option for customers looking for an affordable, quick deployment.

- The current WorkOtter product includes enhanced capabilities for project planning to accommodate the working preferences of Gantt charts, Kanban boards and grid views.
- WorkOtter has improved dashboarding and visualizations with an inventory of interactive options that provide a clean look and feel for an enhanced UI to accelerate user adoption.

Cautions

- Currently, WorkOtter manages 100% of its implementations with full-time employees. As WorkOtter increases its marketing and sales successes, it will need to scale its internal support team to match a growing customer base. Engaging select partners and building a stronger partner network will also ensure that the growth of the customer base does not lead to degradation of customer service, experience and support.
- WorkOtter does not yet provide support and product innovations that would match the needs of EPMOs and PMOs moving toward a resourced digital product management approach.
- Currently, WorkOtter does not provide AI-enabled PPM or RPA options for customers, but it is expected to introduce AI-based features in near-term releases.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

No vendors were added to this Magic Quadrant.

Dropped

No vendors were dropped from this Magic Quadrant.

Inclusion and Exclusion Criteria

- A provider must demonstrate active participation 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 customers to purchase a separate, non-PPM technology platform to obtain PPM functionality. They also must not require investment 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 PPM.
- The software providers must actively market, sell and support one or more stand-alone PPM software products or online application services.

- The software providers must focus mainly on collaborative PPM, enterprisewide PPM, IT PPM and reporting PPM use cases. Vendors with a primary focus on, and significant presence in, niche or specialized PPM markets are not included.
- The software providers must demonstrate a solid track record of successful PPM technology deployments and companion PPM consulting services across a majority of their PPM customers, with little or no reliance on partners and customization to do so.
- The software products must offer comprehensive, integrated project, portfolio and resource management features and capabilities.
- The providers and products must demonstrate longevity in the PPM marketplace, with general availability and active marketing to PPM leaders for at least the past five consecutive years, and without any significant company, product or service disruptions.
- The providers must be able to demonstrate significant market presence, including market penetration, sales and support for multiple regions of the world.
- The providers must be able to demonstrate a viable, proven SaaS strategy.
- The providers must demonstrate a solid product development and innovation cadence shorter than 12-month intervals.
- The providers must have secured at least 10 new PPM customers (not repeat business or renewals) during the past 12 months.
- The providers must have at least \$5 million in annual PPM software revenue, or reliable financial backing.

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 and detailed in the subcriteria. This includes those offered natively or via OEM agreements/partnerships. This also includes an assessment of multiple, independent PPM products supporting differing PPM audiences and use cases. Vendors with multiple PPM products recognize the limitations of trying to cover all PPM use cases with only one software product. Ease of use, balanced with functional depth and cost-effective pricing, were examined, as well as how well and how complete the vendor and products support PPM depth and breadth. Capabilities specifically needed for PMOs were evaluated. Scalability of any applicable products and breadth of deployment options for varied PPM use cases were also assessed. Advancements in applying AI and RPA to PPM technology were measured, in terms of availability in the product and adoption of it by customers in the field. The same measures were applied for resourced digital product management. These measures were applied for execution capabilities and portfolio capabilities.

Overall Viability (Business Unit, Financial, Strategy, Organization): This is 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 includes 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: High marks were given to opportunistic providers that can respond quickly and change 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 execute on a multi-PPM product strategy to support an expansive PPM 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 considers the provider's history of responsiveness to customer requests. Track record in the field was also examined.

Marketing Execution: We analyzed 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 can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities. Web presence was also examined.

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 PPM process consulting services, at little or no extra cost, that enable clients to be successful with the products. Level of responsiveness in technical support or account support was 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, 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.

Table 1: Ability to Execute Evaluation Criteria

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

Source: Gartner (May 2019)

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 PPM offerings. Providers 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. 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 PPM 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 was 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 was 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 was 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 PPM implementations, as well as depth and breadth of support for use cases defined in other Gartner PPM research, was 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 requirements management, agile development, IT service management (ITSM), ERP and other third-party systems, as well as to non-IT third-party data sources and software systems, was examined. The ability to support a global installed base was measured. Acquired products that are tracked postacquisition 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 PPM technology and product roadmaps was also examined, as well as any emergent plans to support resourced, digital product management at the execution and portfolio levels.

Business Model: The soundness and logic of the provider’s underlying business proposition were measured. How well the business model provides value to customers was also examined, as well as how far it reaches to support multiple PPM 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. Recognition of the need for multiple PPM products for a PPM vendor to truly support the multiple PPM use cases prevalent in the field today was also 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. This includes:

- The general availability of AI and RPA in the PPM products offered
- Any improvements to reporting services
- Introduction of social networking and collaboration as part of PPM process automation
- Mobile application development and device support
- User experience innovations; new and differentiating functionality

- Showcasing of other activities that demonstrate the ability to respond quickly to the needs for emergent functionality and/or introduce new concepts, techniques and functions to customers

Acquisitions should make sense and be followed by strong evidence of innovation in added product development, product integration, and customer care and support programs, rather than simple maintenance of a product line and installed base.

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.

Table 2: Completeness of Vision Evaluation Criteria

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

Source: Gartner (May 2019)

Quadrant Descriptions

Leaders

PPM software providers identified as Leaders in this Magic Quadrant meet many of the PPM application functionality and process automation requirements of targeted consumers. They recognize the importance of different PPM scenarios and support the resultant, and often different, use cases. Leaders understand that one PPM product alone cannot support all the different market opportunities available to them, and they take steps to diversify their PPM software product portfolios.

Leaders can provide comprehensive, resilient and high-performance PPM functionality to the project-execution-level customer, as well as to the portfolio-level customer. Additionally, Leaders recognize the market need for different types of PPM products that match well with the proliferation of different project and work environments of their prospective customers. As such, Leaders are acquiring and building out a thoughtful inventory of different PPM products supporting the varied types of customers looking for software in the PPM space.

Most Leaders can demonstrate a strong market presence, combined with a higher-than-usual level of frequency in sales activity and execution. Leaders are growing their installed bases, and their average number of end users per deal is steadily increasing year over year.

Leaders can verify their longevity and stability as on-premises and cloud-hosted providers in the PPM market. Some also have additional products supporting small and midsize businesses, and can offer cloud-based, rather than cloud-hosted, options for smaller workgroups or customers with limited budgets.

Leaders provide depth and breadth of functionality in their applications, representing many years of development. Leaders can provide overwhelming evidence that they are actively selling and marketing their solutions. Their sales and marketing programs continue to be highly effective. Leaders are often heavily engaged with customers as process consultants, in addition to being software providers.

Leaders are beginning to acquire human capital with expertise in data science and AI, including ML. It will not be long before Leaders begin introducing conversational AI and ML capabilities in their PPM products.

Leaders are currently stable financially. In addition, no significant business or outside disruption has shaken or distracted the Leaders in this Magic Quadrant.

Challengers

Many PPM software providers in the Challengers quadrant are enjoying steady, incremental growth in customer count and average users per customer. Some Challengers in this Magic Quadrant have been operating in the space for two decades or more. Challengers often rely on their strong global presence and longevity in the PPM market, and almost exclusively rely on one PPM product offered to the market. These providers are often missing a growing PPM product inventory that would drive stronger vision marks if they recognized the need for a multiproduct PPM business strategy. Others may have a growing product inventory, but are not yet leveraging it in ways that drive diverse PPM technology adoption.

Challengers often seek to enable PPM broadly as a business process, but do not always choose to build out additional PPM products targeting varied PPM use cases. Often bound to the limitations of offering one PPM product, Challengers are not always able to extend, alter and adjust their product to support the diverse needs of different types of PPM customers.

Challengers may focus more on core capabilities, but their products might also be missing recent innovations, resulting in a slower pace of improvement compared to other providers in

the market.

The financial viability, number of customers and average number of users per deal of many of the Challengers often are in line with Leaders. However, support for AI- and RPA-enabled PPM is uneven among the Challengers in this Magic Quadrant.

Visionaries

The Completeness of Vision weightings earned by Visionaries reflect innovative approaches in areas such as collaboration, social networking, mobile device support, interoperability with third-party data sources and group-specific collaboration. The latter might include PMOs, steering committees, workgroups, project execution environments and teams.

PPM service providers in the Visionaries quadrant are enjoying steady, increased growth in customer count and average number of users per customer. Visionaries often demonstrate, as their designation implies, forward-thinking features and traits, such as a cloud-based architecture and agile application development cadence.

Some Visionaries have been more experimental with business models, and they may approach various markets more broadly with variable packaging and pricing (e.g., free trials, try-and-buy options and flexible contract durations).

Like Leaders, Visionaries seek to enable PPM broadly as a business process. However, they also may focus on offering only one PPM product, as opposed to building out an inventory of PPM products like Leaders. However, support for AI- and RPA-enabled PPM is uneven among Visionaries in this Magic Quadrant.

Visionaries' financial viability, number of customers and average number of users per deal may not compare with those of the Leaders or Challengers in this Magic Quadrant. However, these Visionaries make up for such limitations through innovative features and functionality, as well as through direct, responsive customer care and some influence over future product development.

Visionaries are nimble and innovative, but they are also often lean in personnel and other business-enabling resources. They may struggle at times to provide high-quality scalability and performance for customers wanting to deploy hundreds or thousands of licenses.

Niche Players

PPM software providers identified as Niche Players in this Magic Quadrant provide a good core set of PPM functionality and may offer more than one product. Their focus on specific portions of the PPM market puts them close enough to customers to fully understand what improvements should be made to their products quickly in the near term to keep their customers happy.

The products offered by these vendors are maintained well for reliability's sake, and customers are often satisfied, even if the providers are not always well-funded or making big leaps in gained market share or innovation. Like Challengers, Niche Players differ from Leaders in areas

such as innovation. Customers may benefit from having more direct influence over a Niche Player's future product development efforts.

Context

This Magic Quadrant offers an analysis of PPM software providers by the relative placement of the main players in the market according to a variety of criteria, and by offering strengths and cautions for each of the included providers. The evaluations of the providers represent a combination of research, analysis and client reference checks conducted specifically for the Magic Quadrant process. They also include input from the Gartner PPM research community, ongoing provider briefings, interactions with Gartner clients, market developments and other research sources.

Gartner's Magic Quadrant for PPM is a useful input into a process to identify and evaluate PPM software providers. Gartner's "Critical Capabilities for Project Portfolio Management, Worldwide" can also help with PPM product selection, as it evaluates the PPM products against specific PPM use cases. Additionally, Peer Insights for Project Portfolio Management, Worldwide offers perspectives from users of today's PPM and project management software.

Enterprise users should select a suitable provider based on a detailed evaluation of their specific needs and objectives, compared to a provider's capacity to fulfill those objectives, to determine which provider can best address their particular requirements. Additionally, care should be taken to understand any PPM dynamics playing out in a prospective PPM buyer's enterprise. PPM tool proliferation is becoming more commonplace in today's enterprises, as digitalization forces enterprises to experiment with new methods of work and project execution, while also normalizing communication in large-scale transformation initiatives and ensuing programs.

Providers in this Magic Quadrant are mature and robust, in most cases, representing nearly two decades' worth of product evolution. The average general availability of the products across all of the vendors included in this research is 15 years. As such, many of the vendors demonstrate deep levels of PPM experience and work in the field, regardless of their position on the Magic Quadrant. In general, all the products these providers offer have a suitable amount of depth and breadth.

PPM for the Execution-Level PPM Customer

Execution-level PPM customers are mainly interested in enhancing the data sharing, collaboration and communication between project managers and team members in a project environment. All the providers featured in this Magic Quadrant offer some level of centralized request, demand, project, resource and time management capabilities. Reporting services can provide consolidated visibility into the current state of projects, resources and spending.

Execution-level configuration of PPM software supports detailed project or work record creation, scheduling and leveling, resource loading and leveling, time reporting, and project cost management, among other PPM processes. Reporting services, including portfolio-level

reporting, can aggregate the data that the system collects from users performing these activities within the PPM system. In doing so, they often solidify over time as reliable project systems of record. Although this frequently signifies a successful investment in PPM technology, these project systems of record are not always flexible enough to then support project and resource planning and replanning at the portfolio level.

When execution-level PPM software deployments mature and are adopted by the customer over time, integration with other adjacent systems is common. These integrations include, but are not limited to, connections to other management systems (such as the help desk and ITSM systems), as well as to other third-party products such as agile development tools, collaboration platforms and ERP systems.

The success of an execution-level PPM software configuration is highly dependent on the rate of adoption by end users (specifically project managers and team members) of multiple PPM features at the lowest levels of project or work management detail. Without this adoption, the reporting services dependent on said adoption will not provide valuable portfolio views. Therefore, stronger adoption rates lead to better communication between project managers and team members, greater visibility into what is happening at the execution level, and better reporting to management and stakeholders interested in the progress of investments, programs and projects.

Applying social networking and collaboration features and functions in a PPM context within an execution-level deployment can aid or accelerate daily end-user adoption. It does this because it can curb the tendencies of project team members to go outside the PPM system (for example, email, spreadsheets and third-party time-reporting systems) to handle communication and data sharing during project execution activities.

For the execution-level PPM customer, project portfolio reporting services can be the shiny objects that convince management of the value in automating execution-level processes. However, execution-level PPM customers should not expect business managers and executives to actively participate in the use of the PPM system on a daily basis, aside from accessing reports and personal dashboards.

PPM for the Portfolio-Level Customer

Portfolio-level PPM customers are mainly interested in enhancing the data sharing, collaboration and communication among project managers, business sponsors and any roles responsible for strategy realization. Consequently, portfolio-level PPM customers will often look for a top-down, stand-alone system where the portfolio management features and capabilities are not centered or dependent on task- and assignment-level time reporting and detailed project schedule management.

Portfolio-level customers want a common platform for planning, prioritizing and approving demand prior to such work items being passed on to an execution-level PPM system. They want this platform to replace existing spreadsheet-based planning and selection exercises, while also

integrating this platform with different data sources that can include one or more execution-level PPM sources of record and financial data sources.

If the resulting system is not flexible enough to then perform independent planning and replanning without compromising their hard-earned PPM systems of record, PPM leaders are doing one of two things. They are using spreadsheets for independent planning and vetting at the portfolio level, or they are turning to the market again to procure a top-down, portfolio-level software system that can work in conjunction with an existing execution-level PPM system.

Choosing project-portfolio-level PPM allows customers of the project organization, program managers, project managers and resource managers to communicate and collaborate during high-level project and resource planning, replanning and decision making. Summarized, aggregate, execution-level information can also be fed into this common planning platform without severely disrupting the way a project manager (or even project teams) works on a daily basis.

PPM Support for Agile Development and Innovative Work Delivery

Without adding any new, specific functions, some PPM systems have some of the administrative workflow “plumbing” to be configured to support a few parts of agile project delivery in both IT-specific and non-IT forms. Successful use of a PPM system to support agile development teams – or the needs of experimental, innovative project teams – is mainly dependent on how well that system complements and integrates with the typical creative processes in the environment.

Currently, PPM providers are challenged with the critical task of adapting their software for customers increasingly engaging in iterative and agile approaches to project execution, as this represents a major departure from traditional waterfall support already available in their products. The PPM market is already evolving to address this challenge, by developing graphical task management managed as storyboards, and integrating with popular third-party, agile-friendly products (e.g., Atlassian Jira, Broadcom Rally, CollabNet VersionOne). Some vendors are also acquiring additional products to address the needs of evolving iterative and agile work execution environments. Funding and sourcing for digital product management is still a work in progress.

Another ongoing trend in the market includes vendors providing preconfigured PPM software supporting collaboration, communication and project-portfolio-level reporting for agile development and innovative work delivery. Providers with existing footholds in application development process software markets are already providing some level of transparent PPM functionality in integrated development environments. Some vendors are also developing some direct agile-friendly support in their tools. Some of the PPM providers covered in this Magic Quadrant are emphasizing the importance of providing out-of-the-box aggregate application development activity reporting in their products.

PPM, Social Networking and Collaboration

Social networking and collaboration platforms, capabilities, and integration points continue to surface in PPM software. Gartner is seeing a few different approaches to applying social networking and collaboration in a PPM context. Some providers in this Magic Quadrant are relying on classic and basic communication tools and functions, including issue tracking, threaded discussions, calendar synchronization, integration to and from email systems and applications, and other mechanisms.

Other providers integrate with increasingly popular social networking and collaboration products such as Atlassian Confluence, GoToMeeting, Slack and Workplace by Facebook. Still others fully engage in developing native social networking and collaboration as part of their core products.

Notably, some vendors' innovations in packaging and pricing facilitate interenterprise collaboration, allowing project and program team members from partners, suppliers, customers, and project contractors and subcontractors to participate and collaborate on projects and programs.

Social networking and collaboration features in PPM applications can be contextual and support execution- or portfolio-level PPM configurations. They can also trigger viral adoption and "stickiness" among end users. These features are of particular importance to project groups automating adaptive PPM workstreams.

PPM and Mobile Device Support

Many PPM providers continue to add support for mobile devices, including tablets and smartphones. However, building dedicated applications for a series of known wireless and mobile devices available in the field is quickly becoming a differentiator among the providers in this Magic Quadrant. Many PPM providers can support mobile devices by leveraging HTML5 development to push out specific features and capabilities to mobile users of their products. Other vendors have taken mobile support a few steps further, offering dedicated mobile applications available on Google Play or in the Apple Store, with offline access when connectivity is an issue and synchronization when connectivity is restored.

PPM providers are focused on delivering three main mobile capabilities to their customers early:

- Time reporting and task viewing, allowing end users to report their time and progress from mobile devices
- The ability to approve items within a process flow of a PPM system, which enables managers to approve time sheets, project ideas or requests from mobile devices
- Executive reporting to mobile devices, so end users (for example, business managers or project managers) can access and view reports and dashboard information from their tablets or smartphones

Basic Project Management and Reporting From Non-PPM Providers

After more than 20 years of evolution, the PPM software market remains diverse and expansive. Because the need for project management and reporting functions can arise anywhere in today's enterprises, the number of non-PPM providers offering some level of basic project definition, tracking and reporting capabilities has grown over the years.

The initial and core PPM software capabilities that triggered the market in the mid-to-late 1990s – time, resource, and project tracking and reporting – are now largely commodities of the PPM market. The ability to provide these functions in a non-PPM product or platform is well-demonstrated by a growing list of software vendors or consulting firms in markets outside of PPM. But having this basic functionality, which often manifests itself as an extension of a non-PPM platform, an add-on module or a "suite," does not alone make such vendors pure-play PPM providers.

Non-PPM providers laying claim to the PPM market believe they can do so because they have encountered customers with some project assignment, tracking and reporting needs, and were able to support those needs. These functions alone are not enough to support the needs of strategy realization offices (SROs), EPMOs or workgroups engaged in alternative delivery methods like agile or iterative.

SROs and EPMOs need the advanced capabilities offered by the vendors included in this Magic Quadrant. Project automation stemming from platforms and products in markets adjacent to PPM (e.g., ITSM, application life cycle management [ALM], ERP) often does not fit or match all of these needs.

Aside from capabilities within a PPM product, SROs and EPMOs also need a PPM provider and technology that can deliver the capabilities out of the box. Many organizations that commit to non-PPM providers for their PPM technology later learn that many of the features and functions are not truly out of the box. Instead, good configurations end up requiring more customization to support PPM than would be expected.

Additionally, customers of a non-PPM provider's project management product might be looking for a solid implementation partner well-versed in PPM, with many options for advanced levels of PPM consulting services. They may discover that the non-PPM provider's partnerships and services in this area are uncommonly thin for a vendor participating in the PPM market.

Non-PPM providers offering some coverage of project management and reporting in their products do so because they can address some specific use cases for project management that might not require a fully capable PPM product. These technologies and use cases include:

- ALM (or software development life cycle [SDLC]) suites – when orchestrated development efforts require the definition of a development roadmap, work effort or execution plan
- Collaborative work management (generic platforms) – when a collection of related activities requires a loosely structured, general work plan centered on achieving a common goal

- Consulting firms' tools (engagement-driven) – when a consulting effort designed to reach a common goal, optimize a set of business rules or practices, or solve a finite business problem would succeed more easily with software technology that supports the outcomes of the engagement
- CRM or sales force automation (SFA) platforms – when services delivered for a customer require an organized plan to ensure they are delivered effectively to satisfy the needs of the customer
- EA software – when defining the change vehicles (e.g., projects) that will take an IT footprint from a current state to a desired future state
- ERP platforms – when tracking capital and operational expenditures requires the tying of defined capital or operational projects to financial management systems for financial reporting purposes
- ITSM platforms – when infrastructure and operations (I&O) groups need to define, track and report on the projects they must deliver, or when the successful execution of an operations project can reduce the recurrence of trouble tickets, incidents and support requests
- Project planning and collaboration tools (general-purpose, lightweight) – when the need for an organized work effort is identified and needs to be defined in the midst of day-to-day collaborative activities and communications
- Task-, issue- and bug-tracking applications – when the recurrence of issues and bugs can be significantly reduced by executing a project
- Time reporting engines (for resource costing) – when there is a need to tie resource costing and billable hours to client-facing work, or to charge back expenses incurred by one internal department to another internal department
- Workforce management products (focused on HR planning) – when the specific work employees are doing requires an organized plan that results in a unique deliverable, a desired outcome or a product

Market Overview

Providers in this Magic Quadrant include those focused on general-purpose or enterprisewide PPM, as well as IT PPM, as long as the providers meet all of the required inclusion criteria. When evaluating and positioning the vendors included in this research, emphasis is placed on the importance of vendors offering multiple PPM products supporting different PPM use cases. Evaluation of the vendors and products also includes an assessment of their ability to AI- and RPA-enable PPM, as well as evolving support for the shift from project management to digital product management.

The four representative PPM use cases are as follows:

- Internal IT PPM
- Enterprisewide PPM
- Reporting PPM
- Collaborative PPM

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Evidence

¹“From Digital Transformation to ContinuousNext: Key Insights From the 2018 Gartner Symposium/ITxpo Keynote”

²“Market Share: Enterprise Application Software, Worldwide, 2018”

³ Provider-submitted forms detail all the products and services for each provider cited in this research. Multiple analyst briefings were conducted with each provider cited. Interviews or written surveys were conducted with user references from each provider cited. This Magic Quadrant follows the methodology outlined in “How Markets and Vendors Are Evaluated in Gartner Magic Quadrants.”

⁴“The 2019 CIO Agenda: Securing a New Foundation for Digital Business”

⁵“How AI Will Reinvent Program and Portfolio Management”

Note 1

ContinuousNext

“ContinuousNext” is a Gartner term used to describe the perpetual renewal, swift delivery and interaction required to establish and scale digital business. In adopting ContinuousNext, CIOs apply three leadership principles – shape, shift and share – to consistently benefit from consistent, unending change associated with business transformation that takes full advantage of scaled, digital business.

ContinuousNext is a formula for success in a world of sustained and rapid change – through and beyond digital transformation. It addresses the need for continuous innovation, continuous intelligence (for example, real-time streaming), continuous delivery (enterprise agile, DevOps), continuous integration and continuous development. It is the evolution of bimodal thinking.

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.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

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