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The Forrester New Wave™: End-User Experience Management, Q4 2020

The 11 Providers That Matter Most And How They Stack Up

by Andrew Hewitt
October 27, 2020

Why Read This Report

In Forrester's evaluation of the emerging market for end-user experience management (EUEM), we identified the 11 most significant providers in the category — 1E, Aternity, Catchpoint, Lakeside Software, Liquidware, NetMotion Software, Nexthink, Tanium, ThousandEyes, vast limits, and VMware — and evaluated them. This report details our findings about how well each vendor scored against 10 criteria and where they stand in relation to each other. Infrastructure and operations (I&O) professionals can use this review to select the right partner for their EUEM needs.

Key Takeaways

Nexthink And Lakeside Software Lead The Pack

Forrester's research uncovered a market in which Nexthink and Lakeside Software are Leaders; Aternity, Catchpoint, VMware, and 1E are Strong Performers; NetMotion Software, Tanium, and ThousandEyes are Contenders; and Liquidware and vast limits are Challengers.

Qualitative Feedback, Root-Cause Analysis, And Remediation Are Key Differentiators

Vendors that lead the pack strive to collect more than telemetry data. They also focus on understanding human perception of the tech experience. They can help I&O pros identify a wide range of tech-related issues and are increasingly building remediation capabilities directly into the product.

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The Forrester New Wave™: End-User Experience Management, Q4 2020

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with Stephanie Balaouras, Shannon Fish, and Diane Lynch
October 27, 2020

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EUEM Tools Offer Powerful Insights Into Employee Tech Experience

The Forrester Employee Experience Index (EXi) reveals that technology plays a significant role in employee engagement, but I&O pros often have no insight into whether employees' daily technology experience is good or bad.[1] As the importance of EX continues to grow, I&O pros increasingly ask how they can accurately measure and monitor their employees' technology experience. End-user experience management is an emerging market that focuses on improving employee technology experience, using both quantitative and qualitative methods. While EUEM is still an emerging space, customers report that vendors are increasingly analyzing more aspects of the tech experience, whether at the device, app, network, or external provider level. Today's leaders increasingly deliver sentiment analysis of qualitative feedback, improved root-cause analysis, and remediation directly in-product.

EUEM Evaluation Overview

The Forrester New Wave™ differs from our traditional Forrester Wave™. In the Forrester New Wave evaluation, we assess only emerging technologies, and we base our analysis on a 10-criterion survey and a 2-hour briefing with each evaluated vendor. We group the 10 criteria into current offering and strategy (see Figure 1). We also review market presence.

We included 11 vendors in this assessment: 1E, Aternity, Catchpoint, Lakeside Software, Liquidware, NetMotion, Nexthink, Tanium, ThousandEyes, vast limits, and VMware (see Figure 2 and see Figure 3). Each of these vendors has:

- **Telemetry collected through an endpoint agent.** Vendors must deploy an agent directly to the employee endpoint and measure real-time end-user experience from that vantage point. We did not include vendors that solely use an HTML5 browser plug-in and/or server-based agents in this evaluation.
- **EUEM market experience.** The vendor must have more than 30 active paying customers for the EUEM product. These are full-production customers, not proofs-of-concept or pilots. In addition, the vendor must have at least $5 million in revenue generated directly through the EUEM product.
- **General availability as of August 1, 2020.** We required that the EUEM product be generally available (i.e. not in beta or public preview) as of August 1, 2020.

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FIGURE 1 Assessment Criteria

Criteria	Platform evaluation details
Telemetry collection and reporting	What telemetry data does the EUEM product collect? How frequently does the EUEM solution report the data? Does the solution allow customization of data collection? What platforms does the EUEM product support (e.g., Windows, MacOS, or Chrome OS)?
Qualitative feedback collection	How many methods (e.g., surveys or push notifications) does the EUEM product use to collect feedback from employees? What methods does the tool use to analyze the feedback? Can the solution combine qualitative feedback with quantitative feedback to create a user experience score per user?
Dashboarding	Does the solution include roles-based access control (RBAC)? How many roles are available out of the box? Does the solution provide dashboarding across industry, department, and role? Does the solution include an employee technology experience score?
Root-cause analysis	What is the vendor's approach to understanding root cause? Can the solution use AI/ML to predict future technology experience issues? Can the solution identify who launched particular scripts or changed policies? Does the solution provide any specialized capabilities for root-cause analysis for remote workers?
Remediation	How many prebuilt scripts does the solution come with out of the box? Does the solution provide tooling to help IT admins build their own scripts? Does the solution provide suggested actions to remediate issues related to experience?
Third-party integration	What third-party integrations does the EUEM product have out of the box?
Cloud capabilities	Does the solution offer a SaaS-only solution? What was the percentage availability for FY 2019? What percentage of customers use SaaS vs. on-premises? What certifications does the SaaS instance have? How does the solution protect personally identifiable data hosted in the cloud?
Vision	"What is the vendor's long-term vision for the EUEM product? How will it differentiate the product from the competition over the next two years? What's the year-over-year revenue growth for the EUEM product from 2018 to 2019?"
Roadmap	How far out is the roadmap planned, as of August 1, 2020? What is the EUEM's product roadmap for the coming 12 months? How does it specifically address employee experience and IT automation?
Services supporting customer experience	Which services does the company provide to customers for the EUEM product? What is the vendor's client retention rate year over year for the EUEM product? How does the company help clients build the business case for EUEM?

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FIGURE 2 Forrester New Wave™: End-User Experience Management, Q4 2020

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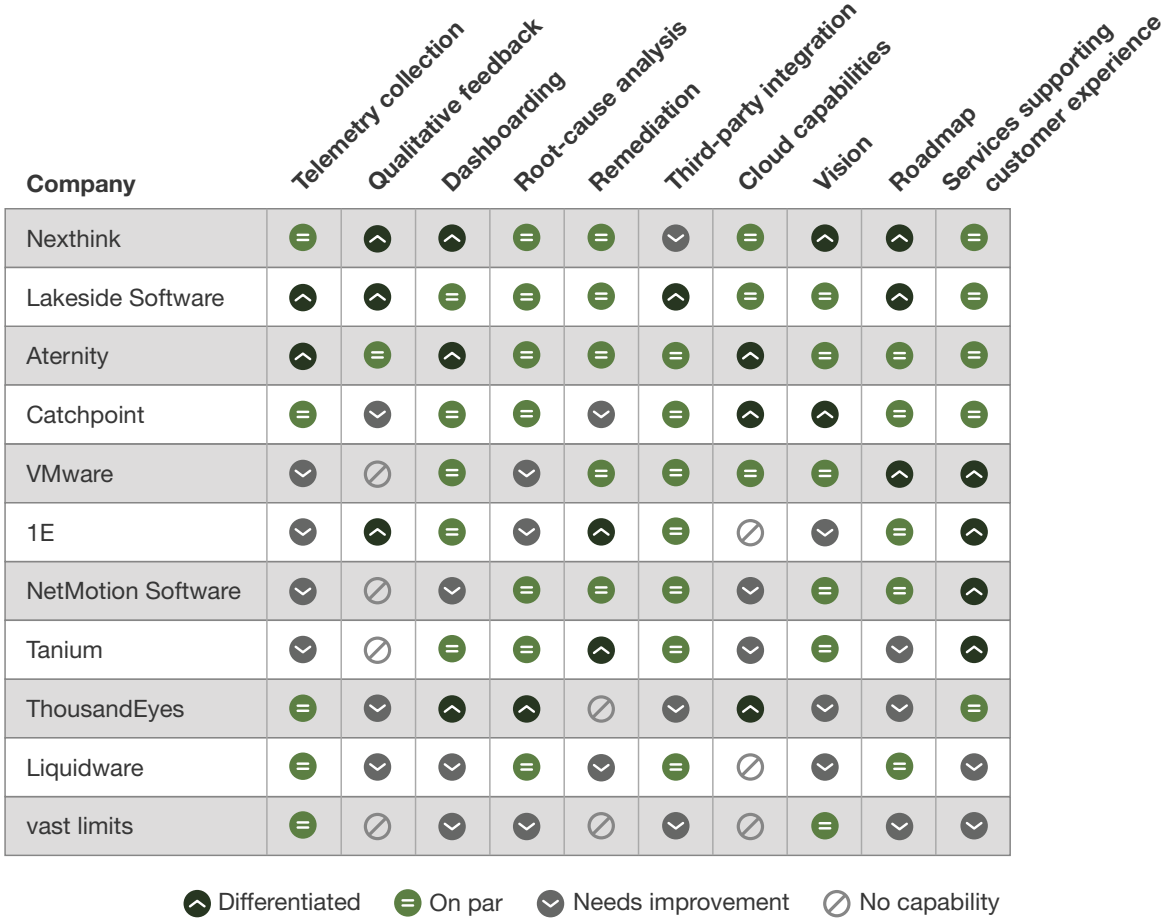
FIGURE 3 Vendor QuickCard Overview



Vendor QuickCards

Forrester evaluated 11 vendors and ranked them against 10 criteria. Here's our take on each.

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Nexthink: Forrester's Take

Our evaluation found that Nexthink (see Figure 4):

- **Leads the pack with holistic experience management.** Nexthink's Digital Experience Score combines hundreds of quantitative telemetry data points with user feedback. The solution provides in-console recommendations on how to improve experience.
- **Needs to better integrate third-party products out of the box.** It relies on professional services for integration of Config Manager, BMC Remedy, and other third-party tools. Support for virtual desktop infrastructure (VDI) is improving but still lags the competition.
- **Is the best fit for companies with a dedicated digital experience staff.** Nexthink's Engage feature collects user feedback and is a powerful tool for change management initiatives, day-to-day experience monitoring, and remote workforce enablement.

Nexthink Customer Reference Summary

Customers praised Nexthink's ability to increase IT survey response rates, reduce mean-time-to-resolution (MTTR), and save costs due to overprovisioning of compute resources. They wanted better integration with existing toolsets and easier ways to export data to external systems, like PowerBI, which is available as of September 28, 2020.

FIGURE 4 Nexthink QuickCard

Nexthink

Wave position
LEADER

= **Telemetry collection**	⌄ **Third-party integration**
^ **Qualitative feedback**	= **Cloud capabilities**
^ **Dashboarding**	^ **Vision**
= **Root-cause analysis**	^ **Roadmap**
= **Remediation**	= **Services supporting customer experience**
^ Differentiated	⌄ Needs improvement
= On par	⊘ No capability

Products evaluated
Cloud: 2020.3; On-premises: 6.27

REFERENCE QUOTES

"We've cut out survey contracts and saved money with the Engage campaigns."

"When it comes to figuring out issues faster, you can't beat it. No one else can do this."

"We'd like to see training available for roles outside of IT, like HR."

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Lakeside Software: Forrester's Take

Our evaluation found that Lakeside Software (see Figure 5):

- **Collects an exceptional amount of experience data.** Lakeside's client-side "sensors" collect more than 7,000 metrics and utilize machine learning to prioritize which data to send to the cloud, enabling IT admins to see only the most relevant experience data.
- **Needs a console revamp.** Customers noted that the console looks and feels dated and expressed frustration with dashboarding customization and filtering and lack of insights and recommended actions to improve experience. However, customers were running older versions of the product, and the company updated the console in June 2020.
- **Is a great fit for VDI environments.** Customers frequently use Lakeside for desktop transformation because of its robust resource utilization capabilities. It supports Citrix, Microsoft, Nutanix, and VMware out of the box.

Lakeside Software Customer Reference Summary

Customers love how much data Lakeside collects, the volume of scripts available, and built-in data anonymization features for GDPR compliance.[2] They want the vendor to provide more standard use cases for Lakeside to help them realize ROI faster.

FIGURE 5 Lakeside Software QuickCard

Lakeside Software

Wave position
LEADER

Telemetry collection	**Third-party integration**
Qualitative feedback	**Cloud capabilities**
Dashboarding	**Vision**
Root-cause analysis	**Roadmap**
Remediation	**Services supporting customer experience**

Differentiated
On par
Needs improvement
No capability

Products evaluated
SysTrack 9.0

REFERENCE QUOTES

"The number of data points that Lakeside collects is much larger than others in the industry."

"The product helped us in our assessment of the desktop landscape for VDI readiness."

"It collects a considerable amount of data but is lacking in insights and corrective actions."

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Aternity: Forrester's Take

Our evaluation found that Aternity (see Figure 6):

- **Excels at measuring application experience.** While Aternity provides device and network-centric monitoring, it stands out on the application front. Its click-to-render and quality of service (QoS) metrics for enterprise apps are a major selling point for customers.
- **Needs to add to its built-in remediation capabilities.** Aternity has fewer out-of-the-box scripts than the competition. Customers complained about having to write their own scripts.
- **Is best suited for companies measuring employee workflows.** Aternity customers frequently use the application monitoring features to measure the speed of key workflows within Microsoft Office, Salesforce, and other mission-critical applications. That's especially true if the company is also measuring performance for customer-facing apps.

Aternity Customer Reference Summary

Customers appreciate the way Aternity makes it easy to see the impact of changes as well as the speed of new feature development and release. They want more functionality (e.g., alerts) to prioritize actions.

FIGURE 6 Aternity QuickCard

Aternity

Wave position
STRONG PERFORMER

- **Telemetry collection**
- **Qualitative feedback**
- **Dashboarding**
- **Root-cause analysis**
- **Remediation**
- **Third-party integration**
- **Cloud capabilities**
- **Vision**
- **Roadmap**
- **Services supporting customer experience**

Differentiated
On par
Needs improvement
No capability

Products evaluated
Aternity SaaS

REFERENCE QUOTES

"Activity monitoring within apps is one of the selling points. We use it to monitor Office apps."

"When I make a change, I can compare before and after."

"I don't have much time to look through dashboards. I need functionality to help me prioritize workflow."

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Catchpoint: Forrester's Take

Our evaluation found that Catchpoint (see Figure 7):

- **Provides multiple vantage points for measuring experience.** Traditionally a software-as-a-service (SaaS)-monitoring company, Catchpoint now provides full visibility from the client all the way to third-party cloud services. Its internally hosted cloud solution shields customers from third-party outages, enabling them to quickly and reliably diagnose external outages.
- **Must collect more data on the device.** Catchpoint collects a heap of data from SaaS apps, internal apps, and networks (internal and external), but its device-centric metrics are less granular than those of the competition.
- **Suits cloud-first companies best.** Although customers frequently use Catchpoint in on-premises environments, organizations whose employees rely heavily on third-party cloud services will benefit from Catchpoint's deep visibility outside the four walls of the enterprise.

Catchpoint Customer Reference Summary

Customers love Catchpoint's holistic approach to experience management, especially its network monitoring capability. Customer service is excellent, and implementation is easy.

FIGURE 7 Catchpoint QuickCard

Catchpoint

Wave position
STRONG PERFORMER

- **Telemetry collection**
- **Qualitative feedback**
- **Dashboarding**
- **Root-cause analysis**
- **Remediation**
- **Third-party integration**
- **Cloud capabilities**
- **Vision**
- **Roadmap**
- **Services supporting customer experience**

Differentiated
On par
Needs improvement
No capability

Products evaluated
Catchpoint Endpoint Monitoring

REFERENCE QUOTES

"The level of DNS, ISP, and Wi-Fi information is incredibly granular."

"The service is amazing. This is a product-engineering-focused company with excellent CX."

"The UI tells you everything, but it's a bit cluttered."

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VMware: Forrester's Take

Our evaluation found that VMware (see Figure 8):

- **Has a strong understanding of technology experience.** VMware enables organizations to track employee adoption of key tech services, and its roadmap includes features such as user sentiment analysis and qualitative feedback. Its technology experience score will be available in late October.
- **Needs time to mature.** Workspace ONE Intelligence lacks the breadth of telemetry data collection of its competitors. Notable gaps include a qualitative feedback survey capability and macOS and Horizon support (coming in Q4 2020).
- **Is ideal for customers already using Workspace ONE.** The solution can call the WorkspaceONE API to remediate user issues (e.g., patching) out of the box using if-this-then-that (IFTT) statements. Because the product comes from an acquisition of Apteligent, a mobile performance monitoring tool, it's also well suited for Android and iOS deployments.

VMware Customer Reference Summary

Customers appreciate VMware's scalability, excellent customer support, and strong predictive analysis capabilities for device failures. They struggle to justify the cost and business benefits.

FIGURE 8 VMware QuickCard

VMware

Wave position
STRONG PERFORMER

- **Telemetry collection**
- **Qualitative feedback**
- **Dashboarding**
- **Root-cause analysis**
- **Remediation**
- **Third-party integration**
- **Cloud capabilities**
- **Vision**
- **Roadmap**
- **Services supporting customer experience**

Differentiated
On par
Needs improvement
No capability

Products evaluated
VMware Workspace ONE Intelligence

REFERENCE QUOTES

"It helps us monitor the health and usage of our fleet of mobile devices."

"The product has scaled without a hitch and proved its worth during the pandemic."

"It's a leading piece of our workplace transformation, for our customers and ourselves."

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1E: Forrester's Take

Our evaluation found that 1E (see Figure 9):

- **Provides a full experience management solution for devices.** 1E excels at remediating device issues, with hundreds of out-of-the-box scripts, a script builder, suggested actions, and automatic remediation natively available. It also has a robust survey tool and chatbot.
- **Lacks a cloud solution and visibility into other services.** 1E is an on-premises solution, although a fully SaaS version is on the roadmap for Q4 2020. It lacks the visibility into applications and networks that competing solutions offer and focuses mostly on devices.
- **Is a good fit for IT ops teams using ServiceNow.** 1E has a direct in-product integration with ServiceNow, enabling service desk admins to see experience issues and take action directly within ServiceNow.

1E Customer Reference Summary

Customers cited the lightweight agent, the speed of querying, and integration with the broader 1E Tachyon product as major pluses for 1E. They noted that data exportation is harder than it should be.

FIGURE 9 1E QuickCard

1E

Wave position
STRONG PERFORMER

Telemetry collection	**Third-party integration**
Qualitative feedback	**Cloud capabilities**
Dashboarding	**Vision**
Root-cause analysis	**Roadmap**
Remediation	**Services supporting customer experience**

Differentiated	Needs improvement
On par	No capability

Products evaluated
Tachyon Experience

REFERENCE QUOTES

"1E helps me keep a piece of sanity and get to sleep at night. I love the responsiveness feature."

"The integration with the 1E Tachyon product enables me to enforce compliance and take actions against the machine."

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NetMotion: Forrester's Take

Our evaluation found that NetMotion (see Figure 10):

- **Excels at mobile use cases.** The solution can diagnose connectivity issues on mobile networks and includes a few unique metrics, such as 4G LTE data consumption and cloud service availability. User-friendly policies perform remediation rather than complex scripts.
- **Lacks some experience management features.** NetMotion doesn't support qualitative feedback or an employee technology experience score. The solution's network focus means its application and device-level metrics are not as granular as those of the competition.
- **Is an ideal solution for the frontline workforce.** The company's mobile carrier and internet focus gives it a unique advantage in situations where employees aren't connected to the corporate network, such as frontline and remote workers.

NetMotion Customer Reference Summary

Customers rated NetMotion's customer support exceptionally high and valued the pre-integrated support for multiple mobile device management (MDM) platforms.

FIGURE 10 NetMotion QuickCard

NetMotion Software

Wave position
CONTENDER

Telemetry collection	**Third-party integration**
Qualitative feedback	**Cloud capabilities**
Dashboarding	**Vision**
Root-cause analysis	**Roadmap**
Remediation	**Services supporting customer experience**

Differentiated	Needs improvement
On par	No capability

Products evaluated
NetMotion v12

REFERENCE QUOTES

"We appreciate the always-on feature, seamless roaming analysis, and integration with our existing tech stack."

"We'd like NetMotion to build out appliances instead of using Windows servers, as well as better DNS integration."

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Tanium: Forrester's Take

Our evaluation found that Tanium (see Figure 11):

- **Is a remediation powerhouse.** The solution has a large library of prebuilt scripts with support for multiple operating systems and languages. Uniquely, Tanium can remediate security-related issues that cause end-user experience degradation, such as malicious software.
- **Needs a scope expansion beyond its traditional area of expertise.** While the solution provides excellent support for laptops, servers, and cloud infrastructure, it doesn't support mobile devices and collects mostly system-level data (e.g., CPU, memory, or app crashes). It lacks a mechanism for collecting user feedback.
- **Is great for companies that want to unify IT ops and security.** The breadth of the Tanium portfolio, which includes endpoint security products, puts it in a unique position to assess the impact of security on user experience, a significant challenge for many IT leaders.

Tanium Customer Reference Summary

Multiple customers cited Tanium's ability to identify device-based root causes related to memory leakage and frozen laptops. The architecture of Tanium makes deployment easy and lightweight.

FIGURE 11 Tanium QuickCard

Tanium

Wave position
CONTENDER

Telemetry collection	**Third-party integration**
Qualitative feedback	**Cloud capabilities**
Dashboarding	**Vision**
Root-cause analysis	**Roadmap**
Remediation	**Services supporting customer experience**

Differentiated	Needs improvement
On par	No capability

Products evaluated
Tanium 7.4

REFERENCE QUOTES

"Tanium helped us find 10,000 app crashes that we didn't know were happening across our payment systems."

"One of the big benefits is the security remediation functionality. We can isolate, contain, remediate, and patch."

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ThousandEyes: Forrester's Take

Our evaluation found that ThousandEyes (see Figure 12):

- **Provides excellent dashboards for root-cause analysis.** The product can trace user experience issues from the device all the way to the cloud service for root-cause analysis. It's a highly mature SaaS offering certified for government usage in multiple geographies.
- **Doesn't offer remediation.** The solution can monitor devices, apps, networks, and cloud services for outages but doesn't offer remediation natively. Following the Cisco acquisition, the firm plans to expand remediation capabilities through integrations with AppDynamics.
- **Is a great fit for global customers that rely heavily on internet and external providers.** The solution has visibility and can diagnose issues from Alibaba, Amazon Web Services (AWS), Azure, and Google Cloud Platform (GCP) as well as internet service providers (ISPs), content delivery networks (CDNs), and remote users on Wi-Fi.

ThousandEyes Customer Reference Summary

References appreciate the strength of the platform's data collection and analysis capabilities, ability to export data to third parties, and quality of support. Customers reported that ThousandEyes occupies a significant portion of the IT budget, so ROI justification is key to success.

FIGURE 12 ThousandEyes QuickCard

ThousandEyes

Wave position
CONTENDER

= **Telemetry collection**	⌄ **Third-party integration**
⌄ **Qualitative feedback**	^ **Cloud capabilities**
^ **Dashboarding**	⌄ **Vision**
^ **Root-cause analysis**	⌄ **Roadmap**
⊘ **Remediation**	= **Services supporting customer experience**

^ Differentiated	⌄ Needs improvement
= On par	⊘ No capability

Products evaluated
SaaS offering (up to date on a rolling basis)

REFERENCE QUOTES

"In 10 incidents, ThousandEyes has helped us pinpoint third parties for outages."

"The availability of tier three and tier four support engineers is a major plus."

"The big killer for us is the price. We need more help to tell the ROI story behind the tool."

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Liquidware: Forrester's Take

Our evaluation found that Liquidware (see Figure 13):

- **Excels in VDI environments.** The product collects more than 300 metrics frequently used for desktop transformation projects, rightsizing VDI endpoints, and diagnosing experience issues. It supports the largest number of VDI vendors in this evaluation.
- **Lacks some important experience management features.** The solution has no qualitative feedback mechanism and lacks scripts for remediation. Liquidware is an on-premises product, so customers can't compare anonymized data against peers or across industry.
- **Is a great fit for highly skilled engineers and architects.** The solution provides a plethora of data and is useful for planning projects, identifying performance bottlenecks, and adding more resources when necessary to improve the experience. It's not a level-one help desk tool.

Liquidware Customer Reference Summary

Customers all appreciated the granularity of data collected, ease of setup, and outstanding support. They cited a need for faster reporting and exporting of data, an easier-to-use UI, and better translation of data into insights.

FIGURE 13 Liquidware QuickCard

Liquidware

Wave position
CHALLENGER

Telemetry collection	**Third-party integration**
Qualitative feedback	**Cloud capabilities**
Dashboarding	**Vision**
Root-cause analysis	**Roadmap**
Remediation	**Services supporting customer experience**

Differentiated	Needs improvement
On par	No capability

Products evaluated
Stratusphere UX, v6.15

REFERENCE QUOTES

"This tool captures all system-level attributes."

"We can isolate user issues down to the app or server level, and the solution can pinpoint root cause."

"We'd like faster and easier reporting. It's not easy to find the data you actually need."

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Vast Limits: Forrester's Take

Our evaluation found that vast limits (see Figure 14):

- **Is an excellent tool for rightsizing VDI environments.** Customers primarily use it for planning VDI projects, monitoring the health of Citrix and VMware environments, and assessing the impact of browsers on overall CPU.
- **Primarily focuses on monitoring experience, not managing it.** The solution collects more than 300 metrics but lacks other key experience management features, such as in-product remediation and qualitative feedback capabilities, that would round out its functionality.
- **Is a good fit for customers that use Splunk as a back end.** This tool doesn't have its own back end but comes out of the box with Splunk. This configuration affords IT admins additional features, such as role-based access control (RBAC), root-cause analysis, and integration with other third parties, such as Tableau.

Vast Limits Customer Reference Summary

References appreciate the cost vis-à-vis outside consultants, the excellent support, and the ease of implementation. Customers expressed a desire for macOS and thin client support.

FIGURE 14 Vast Limits QuickCard

vast limits

Wave position
CHALLENGER

Telemetry collection	**Third-party integration**
Qualitative feedback	**Cloud capabilities**
Dashboarding	**Vision**
Root-cause analysis	**Roadmap**
Remediation	**Services supporting customer experience**

Differentiated	Needs improvement
On par	No capability

REFERENCE QUOTES

"The tool has nearly unlimited reporting functionality."

"It's really helpful for capacity planning and resource utilization."

Products evaluated
uberAgent UXM 5.3.1

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Supplemental Material

The Forrester New Wave Methodology

We conducted primary research to develop a list of vendors that met our criteria for the evaluation and definition of this emerging market. We evaluated vendors against 10 criteria, seven of which we based on product functionality and three of which we based on strategy. We also reviewed market presence. We invited the top emerging vendors in this space to participate in an RFP-style demonstration and interviewed customer references. We then ranked the vendors along each of the criteria. We used a summation of the strategy scores to determine placement on the x-axis, a summation of the current offering scores to determine placement on the y-axis, and the market presence score to determine marker size. We designated the top-scoring vendors as Leaders.

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Endnotes

[1] See the Forrester report "Introducing Forrester's Employee Experience Index."

[2] GDPR is the EU General Data Protection Regulation.

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