

IDC MarketScape

# IDC MarketScape: European End User Experience Management 2022 Vendor Assessment

Zuzana Babicka

Gala Spasova

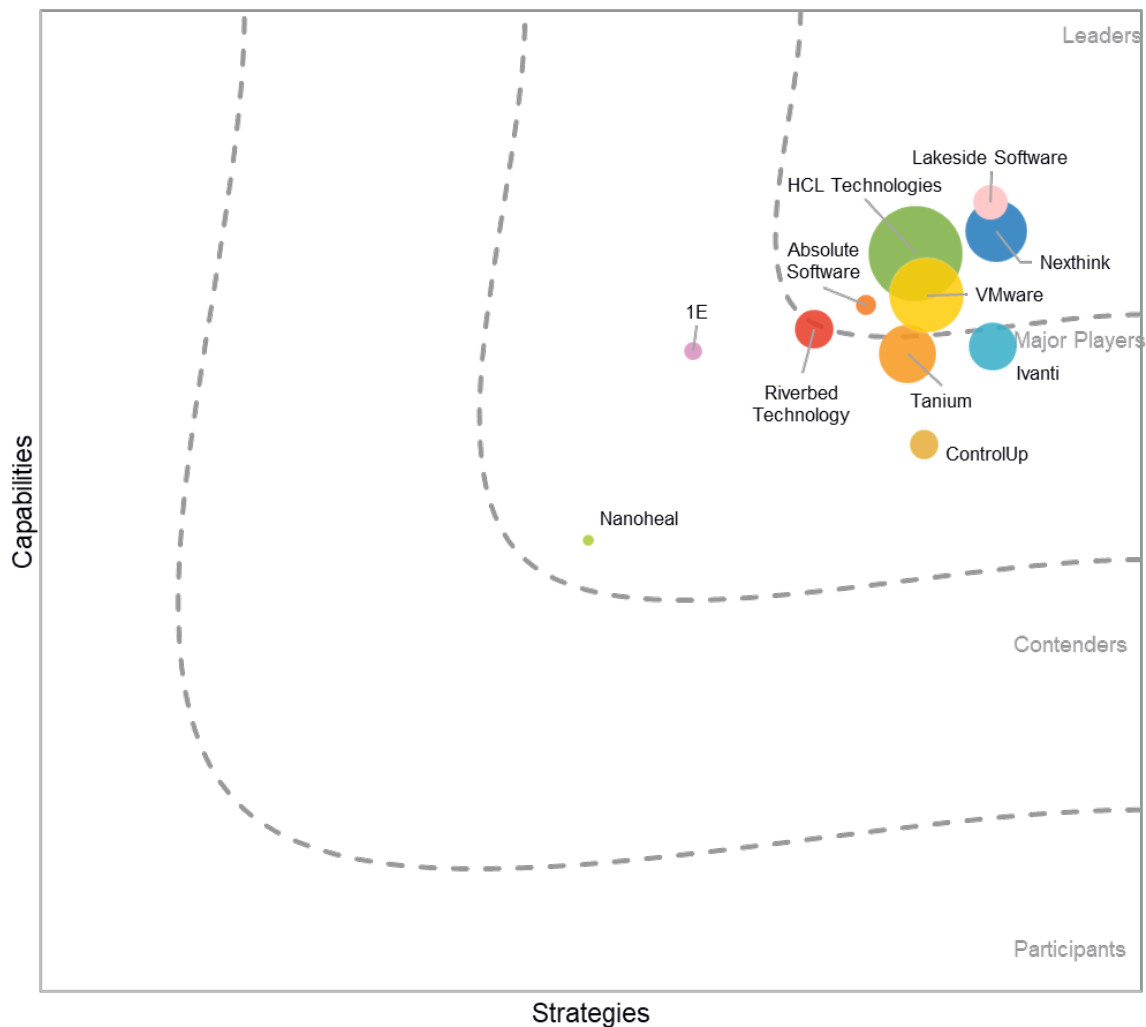
**THIS IDC MARKETSCAPE EXCERPT FEATURES NEXTHINK**

## IDC MARKETSCAPE FIGURE

**FIGURE 1**

### IDC MarketScape: European End User Experience Management 2022

IDC MarketScape European End User Experience Management 2022



Note: Please see the Appendix for detailed methodology, market definitions, and scoring criteria.

Source: IDC, 2022

## IN THIS EXCERPT

---

The content for this excerpt was taken directly from IDC MarketScape: European End User Experience Management 2022 Vendor Assessment (Doc #EUR148395522). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

## IDC OPINION

---

The growing diversity of IT environments and ongoing talent retainment challenges, as well as increasing cost optimization and energy efficiency initiatives, have led to an upsurge in the adoption of end user experience management (EUEM) solutions in recent years. Businesses and public organizations have gone on innovation journeys, with the use of EUEM solutions transforming their IT environment and processes. EUEM customers often derive value from service desk ticket reduction, root-cause analysis and troubleshooting automation, improved lifecycle management, inventory management, IT benchmarking, and enhanced IT security. Although a clear connection exists between good IT administration and end user satisfaction, we encourage technology buyers to shift their focus from purely technical goals toward positive digital employee experience (DEX) creation, especially in terms of sentiment. Good DEX leads to increased employee productivity and well-being and lower attrition, as well as improved adoption of new technologies and higher engagement.

We recommend that technology buyers focus on three key questions before adopting an EUEM solution:

- What do I want to achieve?
- What are the specific needs of my organization and IT environment?
- Where are my organization's weak spots?

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

---

Using the IDC MarketScape model, IDC studied 11 vendors with EUEM offerings in Europe. The following requirements were used to evaluate vendors for inclusion in this assessment:

- Have a product which monitors real-time DEX across applications, devices, virtualization, and networks, with the ability to send automatic alerts about degraded performance. Telemetry must be collected through an endpoint agent.
- Follow the objective to enhance DEX. Thus, besides monitoring, the product must include EUEM capabilities, particularly remediation.
- Have had EUEM customers for at least 12 months as of January 1, 2022.
- Have an EUEM product generally available throughout Europe.

## ADVICE FOR TECHNOLOGY BUYERS

---

IDC offers the following advice to technology buyers considering EUEM adoption:

- **Keep in mind that well implemented and leveraged EUEM solutions always deliver business value.** Assessed vendors reported an average ROI of about 300% for EUEM solutions. These products should not be viewed solely as service desk support tools but as comprehensive solutions helping to accomplish various business goals (e.g., employee engagement, workplace personalization, end user provisioning, application adoption, risk and vulnerability assessment, compliance management, IT cost justification, and risk mitigation during digital transformation projects).

- **Set a simple, clear goal and stick to it.** Decide what you need the most. If your primary mission is improving DEX, set this as your main objective. Do not assume that adopting complex workplace solutions will automatically lead to enhanced DEX.
- **Get staff buy in from the beginning by including them on the innovation journey:** Creating a positive attitude or excitement toward ongoing changes within an organization is a key to success. Engage with stakeholders across departments and educate them on how they can leverage the solution to address their business needs.
- **Plan for the hybrid work model.** Assume that part of your workforce will be remote. Interviewed customers with on-premises EUEM solutions often faced limited visibility into the DEX of their remote staff unless they were logged into the VPN. Consider a cloud solution (offered by all assessed vendors) or ensure that an on-premises alternative can provide you with full insight into all components of your distributed IT environment.
- **Plan on resources and fairly evaluate your own capabilities.** Adopting and fully leveraging an EUEM solution requires a considerable time commitment, especially if you are opting for a solution with less out-of-the-box functionality. Assess your resources and expertise ahead of the procurement process and decide to what extent you can construct and set up tracked parameters, thresholds, and dashboards in-house or whether you require qualified assistance or a more "ready-to-use" solution. Products equipped with preset tools and visualizations supporting your defined business needs can considerably increase time to value.
- **Be clear in communicating your needs to the provider and consider various options.** Assess and compare more solutions to find the right fit for your organization. Inform the vendor or solution provider about your specific needs and expectations. Have a proof of concept.
- **Pay special attention to IT security and personal data protection requirements.** Although EUEM solutions generally lead to improved workplace security and compliance, do not underestimate the importance of detailed role-based access control (RBAC) settings during product selection and set up. Address surveillance concerns from your employees. Ensure that data gathered on employee activity is protected and within legal regulations. Evaluate whether the digital sovereignty of your provider matches your needs.
- **Evaluate different pricing and billing options.** Consider which options are most beneficial for your use case.
- **Choose a solution that matches your current and anticipated future needs in terms of visibility and summary indicators.** Evaluated solutions differ in terms of visibility and scores. Choose the right fit for your organization.
- **Do not underestimate education.** Ensure your staff is well trained on the solution to derive full value.

## VENDOR SUMMARY PROFILE

---

### Nextthink

Nextthink is positioned in the Leaders category in the 2022 IDC MarketScape for European End User Experience Management.

Founded in 2004 by three IT professionals who patented a new method of detecting and visualizing abnormal behaviors in computer networks, Nextthink has grown into a global company with over 1,100 employees. The vendor is fully dedicated to providing EUEM (labeled as digital employee experience management) solutions and services. Nextthink has a long-standing vision of employee-centric IT and consistently adheres to this principle in product development and external communication.

The vendor's EUEM solution, Nextthink Infinity, consists of three main pillars:

- **Real-time monitoring and alerting:** Nextthink Infinity provides single-pane-of-glass insights into devices, applications, virtualization, employee sentiment, and networks. It can distinguish between backend, network, and client issues. The solution collects data via endpoints (real-

time monitoring), web browsers (real user monitoring), and targeted employee engagement (end user sentiment monitoring). The tool tracks DEX in on-premises and cloud-based applications. Derived data insights are transferred to data lakes, ITSM consoles, CMDBs, AIOps, chatbots, and other EUEM tools. Nextthink's DEX score combines device, business application, and productivity and collaboration application performance with employee sentiment, giving the user a full overview of the organization's DEX.

- **Analytics and diagnostics:** A powerful ML engine assists IT professionals in identifying the scope, context, and impact of detected issues. The tool includes visualization of event-level data to show correlations and unusual behavior to support decisions. Nextthink Persona Insight enables flexible end user base segmentation according to device and application usage dimensions to effectively address various IT problems.
- **Automated remediation:** The solution supports both proactive and reactive remediation, but it attempts to avoid the latter. It offers prioritized guidance, ML-powered root-cause analysis, and remediation playbooks.

Nextthink capabilities have been integrated into solutions from major vendors and IT service providers, such as Accenture, Citrix (workplace offerings), Dell, HP Inc. (support of VDI, DaaS, and enterprise IT as-a-service offerings), Qualcomm, and Qualtrics, expanding on their functionality and increasing Nextthink's reputation and market presence.

Nextthink manages 7.7 million endpoints in Europe and 14.0 million worldwide. Most of its clients are in the banking and finance, manufacturing, professional services, and government verticals.

### Strengths

- Nextthink Infinity stands out due to its ability to provide automated guidance on how to address detected malfunctions. Integrated playbooks can assist less experienced L1 and L2 service engineers through individual troubleshooting steps with a set of suggested remediation and standard operating procedures. The tool has an integrated script library containing over 200 scripts, which can be used for remediation and data collection. The solution sorts suggested remediation tasks according to their anticipated impact on DEX (number of end users affected and criticality).
- Nextthink Infinity offers an impressive set of predefined dashboards and ready-to-use tools supporting various business and IT outcomes, including (but not limited to) XLA monitoring, frictionless hybrid working experience, personalized workplace, IT asset optimization, end-user productivity optimization, application adoption, technology rollout, IT service benchmarking, employee security risk assessment, device compliance, Windows migration, and synthetic transactions.
- Nextthink's solution comprises a powerful machine learning engine providing a high level of automation and contextualized insights. The platform performs functions like root-cause analysis, inventory overview, anomaly detection, and event correlation, offering IT administrators strong support for troubleshooting and decision making.
- The tool offers targeted visualizations. IT administrators can perform consecutive drilldowns in dashboards and scores to analyze what happened over time and identify the root cause.
- Nextthink has one of the largest headcounts dedicated to EUEM (over 1,100 employees worldwide). Over 200 employees (account managers, solution consultants, customer success managers, and sales operations) work on direct sales in Europe.
- Nextthink pursues an effective growth strategy through technology alliances with popular IT vendors and service providers. Its solution has been integrated into various products.

### Challenges

- Two interviewed customers indicated room for improvement in terms of quality control and customer success. However, the vendor reports 96% customer support satisfaction across its clientele, based on Zendesk survey tracking. The vendor has also been increasing its headcount for customer success management.

- One customer expressed dissatisfaction with the low granularity of RBAC settings.

### When to Consider Nexthink

Nexthink Infinity is suitable for organizations requiring a comprehensive, user-friendly end DEX solution that works with a simple query language and delivers powerful automations, contextualized insights, and ready-to-use tools.

## APPENDIX

---

### Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis (or strategies axis) indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represent the market share of each individual vendor within the specific market segment being assessed.

The evaluation was based on vendor and customer interviews, publicly available information, and vendor-provided material submitted by November 7, 2022.

### IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

### Market Definition

End user experience management (EUEM) is a functional software market category comprising real-time endpoint telemetry, data analysis tools, and select components of ITSM and UEM, such as IT remediation (including preventative activities), IT asset management and discovery systems, software distribution, and service desk (L0-L3) management. All capabilities center around the objective of improving digital employee experience and may also include employee sentiment collection and analysis as well as end user engagement.

This category is separate from externally focused problem resolution solutions within customer relationship management and monitoring of client-facing applications covered under application performance monitoring (APM). It also excludes workplace suites, hybrid collaboration and conferencing tools, talent management, and workspace security solutions (secure access, endpoint protection, etc.).

## LEARN MORE

---

### Related Research

- *ServiceNow Leverages its Proprietary Workplace Solutions to Ease its Global Transition to Hybrid Work* (IDC #EUR149778822, October 2022)
- *Lakeside Software: Deep and Broad Visibility into Digital Employee Experience* (IDC #EUR247619021, June 2021)
- *Aternity: Digital Experience Management Enabling the Hybrid Working Environment* (IDC #EUR247511820, May 2021)
- *Nexthink: Placing Employee Digital Experience First* (IDC #EUR247509721, March 2021)

### Synopsis

This IDC study includes an assessment of vendors offering end user experience management (EUEM) solutions through the IDC MarketScape model and assessment methodology. The assessment reviews both quantitative and qualitative characteristics that define current market demands and expected tech buyer priorities and needs. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to one another, highlighting the key factors expected to be the most influential for achieving both short- and long-term success in the EUEM market.

"End user experience management solutions have positively impacted hybrid work enablement for many organizations across vertical markets, increasing employee productivity and engagement and fostering talent retainment. During the current period of economic instability, EUEM solutions will continue to support customers in overcoming operational challenges and managing change." – Zuzana Babicka, Senior Research Analyst, European Future of Work, IDC

## About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

## IDC CEMA

Male namesti 13  
110 00 Prague 1, Czech Republic  
+420 2 2142 3140  
Twitter: @IDC  
blogs.idc.com  
www.idc.com

---

### Copyright and Trademark Notice

This IDC research document was published as part of an IDC continuous intelligence service, providing written research, analyst interactions, telebriefings, and conferences. Visit [www.idc.com](http://www.idc.com) to learn more about IDC subscription and consulting services. To view a list of IDC offices worldwide, visit [www.idc.com/offices](http://www.idc.com/offices). Please contact the IDC Hotline at 800.343.4952, ext. 7988 (or +1.508.988.7988) or [sales@idc.com](mailto:sales@idc.com) for information on applying the price of this document toward the purchase of an IDC service or for information on additional copies or web rights. IDC and IDC MarketScape are trademarks of International Data Group, Inc.

Copyright 2022 IDC. Reproduction is forbidden unless authorized. All rights reserved.

