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Emerging PC Life Cycle Configuration Management Vendors

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Although the PC configuration life cycle management (PCCLM) market is mature, with large vendors selling established products, they have not responded quickly to the myriad new customer requirements, which has created opportunity for new vendors. IT leaders who have struggled with established products, due to a lack of comprehensive platform support, an inability to manage security configurations effectively or a lack of resources to manage the PCCLM product infrastructure, should consider these emerging vendors.

Key Findings

- The mainstream PCCLM vendors haven't addressed some of the emerging market requirements, such as non-Windows device management, providing software-as-a-service (SaaS) delivery models and tying together vulnerability assessment with remediation.
- New vendors are entering the PCCLM market, attempting to provide solutions for small to midsize organizations, offering more security capability through tighter endpoint control and managing devices beyond traditional Windows systems.

Recommendations

- Consider emerging PCCLM vendors a viable choice when you have a specific need that matches one of their strengths (for example, Mac/mobile device management, integrating vulnerability assessment with configuration management and SaaS).
- Request to speak with at least two references as part of your evaluation of these vendors; ensure that the references are using the product in the way that you intend to use it.

ANALYSIS

The PCCLM market continues to mature. Vendor offerings in the core areas of inventory, software distribution, patch management and OS deployment have become increasingly similar during the past several years. Still, the mainstream vendors in the PCCLM market (see "Magic Quadrant for PC Configuration Life Cycle Management Tools") can fail to meet organizations' needs in various circumstances. This means that smaller, less established vendors in the PCCLM market may offer the best option for organizations that require particular strengths. The vendors discussed in this research did not qualify for the PCCLM Magic Quadrant; however, they have specific strengths, and may be compelling to organizations that are willing to assume some risk in working with a less established vendor in the PCCLM market.

Mainstream PCCLM vendors are (to various extents) behind the market in meeting some evolving trends. There are three market needs that these emerging PCCLM vendors have developed solutions to help address: SaaS, alternative device management, and integration of endpoint security and client management.

SaaS

As discussed in "Alternative PCCLM Delivery Models Are Emerging," organizations are starting to look for alternatives to traditional on-premises PCCLM software. PCCLM products are complex, and they introduce new infrastructure that must be implemented and managed. This is one of the primary reasons that PCCLM products have not seen substantial uptake in organizations with fewer than 1,000 users. Appliances have seen more market acceptance, but organizations are also starting to seek SaaS products. SaaS platforms represent a new model of monetizing PCCLM software. They are not easily built, and some elements of PC life cycle management must take place on-premises (e.g., OS deployment), so only a handful of offerings exist.

Alternative Device Management

Recent Gartner surveys found that many organizations are supporting client platforms beyond Windows:

- 45% to 50% of organizations support Macs; however, their footprint within organizations is significantly smaller than that of Windows PCs.
- 87% to 93% of organizations support mobile devices.
- 50% to 75% of organizations have requested support for the iPad, and we believe a large percentage of these organizations are already providing support.

The depth and breadth of support for non-Windows client devices among the established PCCLM vendors varies significantly. Organizations that want to collect inventory and deploy occasional applications to non-Windows clients can often use their PCCLM tools successfully. These tools can have trouble deploying complex applications or performing more-advanced functions, such as software usage monitoring. Organizations that require comprehensive non-Windows capability along with traditional Windows-based PCCLM functionality will have to do a thorough evaluation of a small shortlist of vendors, because few offer comprehensive support across multiple client platform types.

Integration of Endpoint Security and Client Management

The convergence of security and operations has been a key theme in client computing for several years. Many security best practices involve standardization, good change management and the enforcement of policies on the endpoint. Desktop organizations have been assuming more security responsibilities, particularly those that are operational. Consequently, organizations have increasingly been drawn to products that tie together vulnerability discovery and remediation. This convergence is particularly strong in midsize organizations, where the same people are often responsible for desktop management and endpoint security.

Emerging PCCLM Vendors

Absolute Software

Based in Vancouver, British Columbia, Canada, Absolute Software has two product lines. Its flagship product is Computrace, an asset tracking product that helps organizations locate and secure lost or stolen PCs and Macs. Absolute Software acquired LANrev in December 2009, and rebranded it as "Absolute Manage." Absolute Manage is particularly strong at managing Mac clients, as this was LANrev's primary focus. Absolute Manage also has the core functionality of Windows client management, but its primary differentiation is in its Mac management. Absolute Software also recently announced comprehensive mobile device management for Apple's iOS4; it is one of the few vendors that offers software distribution for in-house applications to the iOS4 platform. Alternative device management is the emerging market need that Absolute Software addresses most substantially.

Strengths:

- Absolute Manage's Mac support is the strongest among vendors that offer both Windows and Mac management capabilities.
- Customers have reported good experiences working with Absolute Software's customer support.

Cautions:

- Absolute Manage recently added Windows PC imaging based on Free, Open-Source Ghost (FOG). There is a lack of proof points on how well FOG works within Absolute Manage's architecture, and how well Absolute Software can support customers trying to do Windows OS deployments.
- Absolute Software does not have a broader service management offering (e.g., service desk and asset management), which is something that many organizations (particularly midmarket organizations) look for from a single vendor.

Kaseya

Based in Switzerland, Kaseya has a wide range of client management functionality. It has several product editions. The Enterprise Edition is positioned for large organizations, while the Small-Medium Enterprise Edition is positioned for smaller organizations. Both of these are on-premises software products. Kaseya also recently released a SaaS platform (called IT Center), which contains a subset of the functionality available in the on-premises editions (and, most notably, lacking OS deployment). SaaS is the emerging market need that Kaseya is working on addressing. Kaseya's products have developed a reputation for being easy to install and use, compared with many competitive products. We generally see Kaseya Enterprise Edition in organizations with 200 to 1,000 end users, a market segment in which many organizations struggle with many of the established PCCLM products.

Strengths:

- Kaseya's products offer a wide range of client management functionality, including capabilities that many other PCCLM products don't offer, such as PC backup and system performance monitoring.
- Kaseya's functionality is based on a single agent, and has a Web-based user interface.

Cautions:

- The vendor's product editions lack a full-featured OS deployment module. For example, it does not provide pre-execution environment (PXE) boot imaging, which is something Kaseya plans to address in the second quarter of 2011.
- While Kaseya has a ticketing offering, it doesn't have the breadth of service management functionality that many established PCCLM vendors have, such as an asset repository.

Numara Software

Numara Software is based in Tampa, Florida. It acquired Criston Software in 2009, and renamed Criston's product Numara Asset Management Platform (NAMP), which (despite its name) is a PCCLM product. Numara Software's heritage is in the service desk space, and a big part of the company's strategy involves tying together service desk and asset management processes by integrating Numara FootPrints and NAMP. NAMP has full PCCLM capabilities, but its primary differentiator (with respect to the emerging market needs discussed above) is to integrate security and operations processes by doing vulnerability assessment and remediation from the same console, using the same agent and working with the same set of data. The lion's share of Numara Software's business is generated by its service desk products, Numara FootPrints and Numara Track-It!; Criston did not have a large installed base prior to its acquisition by Numara Software. Although Numara Software has had some traction with NAMP, it must continue to demonstrate an ability to execute as a new vendor in the mature PCCLM market.

Strengths:

- NAMP uses a single agent for all life cycle management functions (inventory, software distribution, patch, vulnerability management, etc.).
- Agentless asset discovery helps organizations identify rogue machines and keep an accurate account of IT assets.

Cautions:

- NAMP only has basic Mac support, offering inventory, software deployment and power management. It lacks patching, OS deployment, remote control and software usage monitoring for Mac clients.
- NAMP does not have mobile device management functionality; organizations must use third-party products to manage smartphones and tablets.

Viewfinity

Based in Waltham, Massachusetts, Viewfinity is a SaaS-based PCCLM and privilege management vendor. Its SaaS delivery model is the emerging market need that it most substantially addresses. The company was started by the founders of XOsoft, who had a unique approach to managing data using a filter driver to capture byte-level changes, which enabled them to create time-captured checkpoints for each input/output event. They took a similar approach to managing Windows configurations when they founded Viewfinity. This allows

Viewfinity to encapsulate applications (similar to application virtualization technology) and roll back configurations more granularly than can be done using native Windows capabilities. While Viewfinity offers the core capabilities of PCCLM, its focus of late has been around privilege elevation, to help organizations implement PC lockdown more effectively. Most Gartner client conversations involving Viewfinity have been about privilege elevation, not client management. Organizations that find Viewfinity's approach to managing the endpoint compelling should request at least two references that are using the product for system management.

Strengths:

- The SaaS platform allows organizations to quickly trial and deploy PCCLM and privilege management functionality.
- The agent, based on a low-level filter driver, allows for granular control of the endpoint.

Cautions:

- Viewfinity is still unproven in the PCCLM space, a market with established products. Potential customers must do their own reference validations to ensure that other customers are using Viewfinity successfully to solve PCCLM problems.
- OS deployment is provided through a partnership with Acronis, which adds a layer of vendor complexity.

RECOMMENDED READING

Some documents may not be available as part of your current Gartner subscription.

"Magic Quadrant for PC Configuration Life Cycle Management Tools"

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