

Magic Quadrant for Adaptive Project Management and Reporting

4 September 2024 - ID G00802033 - 37 min read

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Adaptive project management and reporting tools automate continuous delivery to support an organization in making data-driven decisions. This research evaluates 13 vendors offering these technologies that help manage an accelerated pace of change and continuous delivery.

Market Definition/Description

The adaptive project management and reporting (APMR) market is defined by technologies that can support multiple delivery models to optimize project management practices and complex resource management needs across an organization. These tools promote continuous collaboration and unification of diverse and distributed teams. To support accelerating rates of change and continuous value delivery, these tools adapt to changing customer needs and governance approaches across multiple organizational designs and operating models. They provide multiple execution approaches that are grounded in value-based decision making and the time-to-value perceptions of their customers.

Organizations need tools to support the integration of traditional development practices alongside agile, adaptive and hybrid ways of working while driving high levels of productivity from contributors and team members. The dynamic and complex multiple organizational operating model design of all organizations makes the correct governance approach imperative, yet difficult to achieve. To drive organizationwide outcomes, APMR tools need to support adaptive decision making without incurring additional bureaucracy.

Mandatory Features

The mandatory features for this market include:

- Supporting multimethodology working within the same tool
- Demanding management, resource management and prioritization capabilities
- Tracking and reporting on value, and producing reports to support tactical decision making

Common Features

The work and project teams in these environments need to:

- Optimize overall project and resource management
- Promote continuous customer responsiveness and satisfaction
- Adapt to changing customer needs
- Base execution approaches on the time-to-value perceptions of their customers

Magic Quadrant

Figure 1: Magic Quadrant for Adaptive Project Management and Reporting





Vendor Strengths and Cautions

Asana

Asana is a Leader in this Magic Quadrant. Its product, also called Asana, focuses on work management and enables effective collaboration for various work types. Asana's operations are geographically diversified. Its customers are in a range of industries, handling IT and non-IT work needs. Asana's product strategy incorporates client feedback, expands integrations and evaluates the implications of collaboration intelligence. Asana's product roadmap delivers enhancements at least monthly and includes detailed release notes with training videos.

Strengths

- **Market presence:** Asana continues to have a large global presence with offices and partners around the world. This and the platform's translation into many languages make it a viable solution internationally.
- **Product roadmap:** Asana has continued its push of AI features since the last iteration of this Magic Quadrant, along with improvements to its APMR capabilities, and plans on using AI in prioritization, capacity and reporting in the coming months.
- **Customer experience:** Asana is customer-focused and has continued this trend, continually getting high marks in customer satisfaction.

Cautions

- **Business model:** Asana is operating at a deficit, despite being large and having continued year-over-year revenue growth. It anticipates that its growth and sustainment of customers will offset this.
- **Market strategy:** Asana presents itself as a vendor of both project management and collaborative work management tools. This, combined with its broad industry focus and customer acquisition strategy, may not appeal to buyers looking for specificity.
- **Pricing structure:** Only Asana's higher-priced plans offer the features enterprise users will require to meet the capabilities they anticipate in an APMR tool.

KeyedIn

KeyedIn is a Leader in this Magic Quadrant. Its product, KeyedIn Enterprise, focuses on project execution management, including resource and capacity management, as well as project reporting and dashboards. KeyedIn's operations are geographically diversified, with direct sales and support capacity across the Americas, EMEA and Asia/Pacific. Its clients are in industries such as financial services, healthcare, manufacturing and retail, and the biomedical and pharmaceutical sectors. KeyedIn's product roadmap includes investments in AI to help inform decision making and to help clients optimize resource allocation.

Sciforma acquired KeyedIn in March 2023. At the time of our evaluation, however, both KeyedIn and Sciforma met the inclusion criteria for this Magic Quadrant and operated separately. Gartner will provide additional insight on this acquisition as more details become available.

Strengths

- **Market understanding:** KeyedIn has a broad customer base across multiple industries. It leverages this foundation to address customer pain points by using customer advisory boards, feature requests and industry experts to develop its product strategy.
- **Geographical presence:** KeyedIn has a strong geographical footprint across EMEA and the Americas, with additional supporting data centers in Asia/Pacific. Its provision of additional operations capacity in Asia/Pacific is intended to enable it to grow there.
- **Product roadmap:** KeyedIn's roadmap focuses on deepening the integration of AI and machine learning (ML) to optimize resource management and inform decision making.

Cautions

- **Sales execution:** KeyedIn's relatively low number of sales partners may limit its growth in the small/midsize enterprise segment of this market.
- **Operations:** Sciforma's acquisition of KeyedIn introduces uncertainty into the product's capability coverage and licensing plans. Buyers should understand the implications of the acquisition during contract negotiation.
- **Marketing execution:** KeyedIn's global visibility is relatively small, with a narrow social media presence and limited tradeshow/conference appearances outside of EMEA.

monday.com

monday.com is a Leader in this Magic Quadrant. Its product, also called monday.com, provides project and work management capabilities that support the needs of distributed teams using hybrid methodologies. monday.com's operations are geographically diversified and its customers are in a variety of industries, such as marketing, retail, media and education. monday.com's product roadmap includes investing in AI, simplifying configuration and standardizing processes.

Strengths

- **Marketing strategy:** monday.com continues to experience year-over-year growth by building on an intuitive user experience, and targeting influencers and roles in a variety of industries.
- **Product strategy:** monday.com has defined investment pillars and a roadmap that includes advancements in AI, agile delivery insights and enhanced executive-level

dashboard visualizations.

- **Geographical presence:** monday.com has established data regions in the U.S., the EU and Asia/Pacific to provide geographically aligned support, data residency, storage and bandwidth.

Cautions

- **Market understanding:** monday.com is rapidly expanding into areas adjacent to the APMR market. Extending the product to include functions and features associated with tools in other markets, such as IT service management and CRM, could limit investment in APMR-specific capabilities.
- **Sales strategy:** monday.com's sales strategy is focused on growth driven by its positioning as a low-code software solution. APMR capabilities are included as a continuum of functionality within monday.com's work management.
- **Business model:** monday.com's product is hosted entirely on Amazon Web Services infrastructure. It does not offer an on-premises option, which some large public-sector organizations may require.

Planforge

Planforge (formerly ONEPOINT Projects) is a Niche Player in this Magic Quadrant. Its product, Planforge, is a project management tool that supports enterprisewide strategy. Planforge's operations are mainly in EMEA. Its clients tend to be midsize organizations in the government, technology, automotive, finance, insurance and aerospace/defense sectors. Planforge's product roadmap includes continued multimethod enhancements, enhanced collaborative capabilities, further integrations and continued AI improvements.

Strengths

- **Customer experience:** Planforge has a loyal customer base that identifies its technical support and in-product instructions as positive features.
- **Market understanding:** Planforge's market understanding in regulated industries and governments helps guide and define Planforge to support traditional and agile scaling techniques within these sectors.
- **Innovation:** Planforge's continued investment in Scaled Agile Framework (SAFe) capabilities and its focus on AI have enabled it to deliver value to clients operating in a

multimethod environment.

Cautions

- **Geographic strategy:** Planforge has a limited geographical presence, with few partners outside EMEA. Its continued focus on EMEA may hinder its growth in other markets.
- **Viability:** Planforge did not grow year over year and is operating at a loss. To counter the effects of stagnation in private sector sales, it is focusing on government clients.
- **Market execution:** Planforge has seen a lack of growth and is “restarting” its partner business to improve lead generation. The effects of this remain to be seen, but its current state did not create the growth anticipated.

Planisware

Planisware is a Leader in this Magic Quadrant. Its product, Planisware Orchestra, focuses on meeting a broad range of project and work management needs. Planisware’s operations are geographically diversified. Its clients tend to be midsize and large organizations in a variety of industries, including financial services and manufacturing. Planisware’s product roadmap includes improvements to the user experience, additional objectives and key results capabilities, automated work effort tracking, new forms, and AI-powered features such as bottlenecked resource analysis.

Strengths

- **Market responsiveness:** Planisware is responsive to market demands. Planisware hosts a customer advisory board and best-practice working group to help ensure alignment between its roadmap and customer expectations relative to the APMR market.
- **Operations:** Planisware Orchestra is an established product and its capabilities keep pace with market and technology trends. The product is supported by staff and partners in the Americas, EMEA and Asia/Pacific.
- **Overall viability:** Planisware has experienced consistent year-over-year growth and is profitable. It has the potential for continued growth in the Americas and Asia/Pacific.

Cautions

- **Marketing strategy:** Planisware partners with a subset of program management office (PMO) influencers on podcasts and webinars, but does not have a clearly articulated

strategy that includes social media or SEO-optimized content.

- **Sales strategy:** Planisware directly distributes its solution in North America, EMEA and APAC, while relying on channel sales that may include bundled services in other regions.
- **Pricing:** Planisware's pricing construct includes a private hosting cost, in addition to role-based user licenses. Although there is an option to purchase an "essential package," the minimum required investment may seem cost-prohibitive to some prospective customers.

Planview

Planview is a Leader in this Magic Quadrant. Its product, Planview AdaptiveWork, focuses on providing capabilities across a broad set of project and work management functions.

Planview operates globally and its clients are in many industries, showing the product's broad appeal. Planview's product roadmap for AdaptiveWork focuses heavily on AI capabilities, as Planview continues to deploy features that improve efficiency.

Strengths

- **Market understanding:** Planview uses its broad market presence and a multichannel approach to engage with a diverse group of influencers. Its continuous review of the market allows for timely responses to market demands with its weekly release schedule.
- **Geographical strategy:** Planview continues to invest in, and increase, its geographical presence, including investments in Asia/Pacific. AdaptiveWork is available and supported in a variety of languages.
- **Product:** AdaptiveWork has a broad range of capabilities above market average. The enhancements Planview has made in the last year have further increased AdaptiveWork's integration capability and its resource, financial management and multimethodology capabilities.

Cautions

- **Innovation:** Although the vendor plans to invest heavily in AI, the exact productivity and other gains clients will realize has yet to be determined. As these advancements are deployed, potential customers should understand what benefits clients are seeing.
- **Sales/pricing:** AdaptiveWork is a comprehensive solution and prospective customers should evaluate whether the value justifies the expense, relative to their workflow and use

cases.

- **Customer experience:** Some Planview customers say the complex configuration process prevents quick value gains from AdaptiveWork. Organizations should be aware that the configurability of AdaptiveWork can lead to complexity.

Proggio

Proggio is a Niche Player in this Magic Quadrant. Its product, also called Proggio, focuses on broad project and work management capabilities. Proggio's operations are mainly in Israel, and it has established its team in the U.S. to support growth there. Proggio's clients tend to be midsize and large organizations in industries including biotechnology, pharmaceuticals, IT and manufacturing.

Proggio did not respond to requests for supplemental information. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Product:** The Proggio offering has a simple, intuitive UI that supports a multimethod environment. This, combined with a dedication to technology-enabled industries and projects, drives the product to be focused solely on APMR capabilities.
- **Pricing:** Proggio's licensing model is for unlimited users with all plans. This may be a cost-effective solution for midsize and large organizations.
- **Market responsiveness:** Proggio responds to its clients' demands and, accordingly, has recently focused on AI and natural language processing (NLP) to automate common tasks.

Cautions

- **Geography:** Proggio has limited geographic presence, with offices in only Israel and the U.S. It plans to open an EMEA office in 2024 to support growth in that market.
- **Viability:** Proggio expects to go through series B funding in 2024 and currently has \$3 million to \$5 million in annual recurring revenue. At this stage, its continued viability depends on its ability to keep acquiring new customers to achieve profitability.
- **Market execution:** Proggio's pricing structure restricts its target market to companies with more than 500 users. This may hinder its growth because it eliminates a viable part of the APMR market.

ProjectManager.com

ProjectManager.com is a Niche Player in this Magic Quadrant. Its product, ProjectManager, focuses on the needs of distributed teams delivering agile and waterfall frameworks. ProjectManager.com is headquartered in the U.S. and has offices globally, including in New Zealand, where it was founded. Its clients tend to be small and midsize enterprises in industries including construction, manufacturing and IT. ProjectManager.com's roadmap focuses on integrations with other products, user experience enhancements and mobile app upgrades.

ProjectManager.com did not respond to requests for supplemental information. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Market understanding:** ProjectManager.com understands the needs of organizations that operate via hybrid and remote working, as well as the need to track value created across project teams.
- **Customer success:** ProjectManager.com invests considerable time and resources in each customer's implementation, emphasizing the importance of supporting project teams' journeys.
- **Industry strategy:** ProjectManager.com views the construction, manufacturing, IT and professional service industries as core growth areas and builds capabilities to support them.

Cautions

- **Geographical presence:** ProjectManager.com has a limited geographical presence, and its product is available only in English. This limits its ability to support global organizations.
- **Sales/business model:** ProjectManager.com's direct sales model limits its growth to the small/midsize enterprise segment of this market. It has not registered significant customer growth since its latest funding efforts in 3Q22.
- **Product innovation:** ProjectManager.com has not invested in AI or automation technologies and, at the time of this writing, had not published plans to invest in them in the near future.

ProSymmetry

ProSymmetry is a Challenger in this Magic Quadrant. Its product, Tempus Resource, focuses on project planning and execution, with an emphasis on complex resource management. ProSymmetry's operations are geographically diversified. Its clients tend to be midsize and large organizations, with users typically in an IT PMO, or in product development, R&D or internal auditing. ProSymmetry's roadmap for Tempus Resource includes enhancements in resource management, AI and expanded integrations.

Strengths

- **Viability:** ProSymmetry has continued its growth year over year and remains profitable.
- **Customer experience:** Customers continually rate Tempus Resource highly, especially when resource capacity and demand are their main pain points. Users continue to highlight the product's flexibility and ease of use.
- **Pricing:** ProSymmetry's pricing is competitive, and potential buyers have a free trial period to determine if the software fits their needs.

Cautions

- **Training:** Although ProSymmetry has online resources for training and limited no-cost training, implementation packages with training for clients is an additional service with associated fees.
- **Industry strategy:** ProSymmetry does not focus on a particular industry, and instead focuses on core organizations (e.g., IT PMOs) within industries. Although this meets the demand of those particular groups within organizations, potential buyers should bear in mind ProSymmetry's lack of industry specialization.
- **Innovation:** ProSymmetry has consistently had more control in innovation, due to its status as a private company. However, the company plans on launching additional products this year, which may divert innovation in the APMR market. Customers should review ProSymmetry's roadmap to ensure it keeps pace with their anticipated needs.

Sciforma

Sciforma is a Leader in this Magic Quadrant. Its product, Sciforma Vantage, focuses on a broad set of project planning and execution capabilities. Sciforma's operations are

geographically diversified. Its clients tend to be large organizations in industries such as healthcare, pharmaceuticals, financial services and manufacturing. Sciforma's product roadmap includes AI/ML reporting, resource and risk capabilities, prepackaged integrations, and UI/user experience (UX) enhancements.

Strengths

- **Overall viability:** Sciforma has maintained steady customer growth and feature development, despite challenging market conditions. Funding from its private equity owners gives it strong financial viability.
- **Geographical presence:** Sciforma Vantage is available in multiple languages and has direct sales and support across the U.S., EMEA and Asia/Pacific. In addition to many standard European languages, the product is the only one available natively in Arabic, and customers can also localize it to meet local needs.
- **Market understanding:** Sciforma has a long tenure in the project management market and understands the opportunities that new technologies, such as AI/ML and hybrid methodologies, bring to project management.

Cautions

- **Product roadmap:** Sciforma is investing in third-party integration and AI/ML capabilities, but has started this investment later than many competitors. Although it has a clear understanding of the market, its product roadmap for these key features tends to lag much of it.
- **Pricing and sales strategy:** Unlike most of the market, Sciforma does not offer free trial periods for customers to experience the platform firsthand, and its sales cycle can be protracted.
- **Industry strategy:** Although Sciforma Vantage complies with standards and regulations common to the market such as ISO 27001 and General Data Protection Regulation (GDPR), its compliance with other specific international regulations may require the customer to negotiate a nonstandard contract.

Smartsheet

Smartsheet is a Challenger in this Magic Quadrant. Its product, also called Smartsheet, is a work management tool based on a spreadsheet approach. Smartsheet's operations are

geographically diversified. Its clients tend to be midsize to large organizations in industries including financial services, IT and communications. Its product roadmap focuses on integrating project and resource management capabilities into a unified product, delivering AI-powered features, and enhancing collaboration.

Smartsheet did not respond to requests for supplemental information. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Operations:** Smartsheet is geographically diversified and has a large staff to support the product. The executive leadership team is focused on promoting efficient operations that optimize financial performance for shareholders.
- **Overall viability:** Smartsheet has sustained double-digit year-over-year growth and has a substantial global user base. Enterprise and Business plans are its fastest-growing paid licensing segments.
- **Marketing execution:** Smartsheet effectively markets the product based on its ease of adoption. Smartsheet targets key personas, leveraging extensive downloadable templates and native collaboration features.

Cautions

- **Market understanding:** Smartsheet markets the product as both a collaborative work management and adaptive project management solution. This approach may limit Smartsheet's development relative to user expectations within the APMR market.
- **Market responsiveness:** Smartsheet continues to exclude resource capacity planning from base Pro licensing, reflecting a disconnect with customer expectations of the APMR market.
- **Pricing strategy:** Although Smartsheet license pricing is competitive, the pricing strategy is being adjusted at the Enterprise and Business plan levels. The updated pricing model establishes a provisional user license, which is converted to Enterprise or Business license pricing at the conclusion of the provisional period. As such, some customers may need to be more proactive in managing user access.

WorkOtter

WorkOtter is a Visionary in this Magic Quadrant. Its product, also called WorkOtter, focuses on providing clients with best practices for project management. WorkOtter is a global company that operates entirely remotely. Its clients tend to be midsize and large organizations in industries such as IT, engineering and state/local government. WorkOtter's product roadmap focuses on forecasting/predictive analytics, third-party integrations and UI/UX modernization.

Strengths

- **Market understanding:** WorkOtter demonstrates a strong understanding of the market's needs and direction. It leverages its high staff-to-customer ratio to build a tight understanding of customer needs. Its monthly release cadence allows it to deliver frequent improvements, focusing on AI/ML, multimethodology roadmapping and user experience.
- **Pricing:** WorkOtter's pricing structure reflects the budgetary constraints of its target customers. It provides free access to requestors and report viewers, so unlicensed users can view projects at no additional cost.
- **Financial strength:** WorkOtter is a profitable, privately held company that has registered solid operational growth and revenue year over year. In 2023, WorkOtter attracted investment from Lock 8 Partners, a private equity company, to fund future growth.

Cautions

- **Marketing execution:** WorkOtter attends a limited number of in-person events and conferences. Although it maintains a blog and hosts webinars, its social media presence is small compared to that of other vendors in the market, which may impact its visibility and growth in the long term.
- **Organization size/presence:** WorkOtter has a small employee base, with team members spread thinly across the globe. This may limit its ability to quickly scale to meet sudden growth in demand.
- **Limited localization:** WorkOtter's product is available in English only, though it can localize currency, date and number formats.

Wrike

Wrike is a Visionary in this Magic Quadrant. Its product, also called Wrike, focuses on enabling effective project collaboration between enterprise teams. Wrike's operations are geographically diversified. Its clients tend to be midsize and large organizations in industries including manufacturing, retail and the media. Wrike's product roadmap focuses on delivering productivity-centric enhancements concentrated on a streamlined UX, AI-powered features, product management capabilities and resource skills mapping.

Strengths

- **Geographical strategy:** Wrike has offices in North America, Latin America, EMEA and Asia/Pacific. It complements these with a robust partner network that provides full global support capabilities.
- **Product innovation:** Through its Lightspeed architecture and Work Intelligence suite, Wrike has significantly revised its product to streamline the user interface and deliver AI features, including risk prediction and task creation from notes.
- **Market understanding:** Wrike continues to leverage its user communities to understand APMR market trends. This has resulted in planned enhancements that will help customers operationalize AI for project management, support agile ways of working across the enterprise, and manage value-driven initiatives.

Cautions

- **Operations:** Due to Symphony Technology Group's acquisition of Wrike in 2023, Wrike incurred significant restructuring costs that were absorbed during the 12 months preceding this analysis. Wrike is cash-flow-positive and its restructuring costs are projected to decrease through 2025.
- **Customer experience:** Customers report inconsistent performance between the desktop and mobile versions of Wrike. Some agile teams indicate that standard metrics are still under development within the Wrike product.
- **Business model:** Wrike does not offer an on-premises licensing option, which some large public-sector organizations in EMEA may require. Access to a more robust integration set and advanced resource capacity planning functionality is available only at additional cost or at the Business, Enterprise and Pinnacle licensing levels.

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

- **Adobe.** Adobe's Workfront has focused more on collaborative work management, and advancements and customers in that area. Consequently, it did not satisfy the inclusion criteria for this Magic Quadrant.

Inclusion and Exclusion Criteria

Inclusion Criteria

- A vendor must demonstrate active participation in the APMR market as a pure-play Project Portfolio Management (PPM) software company — with a clear and primary software business model, as opposed to a consulting business model.
- The software products must not require the purchase of a separate, non-PPM technology platform from the vendor to obtain Adaptive Project Management and Reporting (APMR) functionality. The vendor also must not require customers to invest in a set of extensions or modules as part of a "single-source" value proposition from a vendor competing primarily in markets other than PPM.
- The vendor must actively market, sell and support one or more stand-alone APMR software products or online application services.
- The vendor must focus mainly on collaborative PPM, enterprisewide PPM, IT PPM and product-based PPM use cases.
- The vendor must demonstrate a solid track record of successful APMR technology deployments and companion APMR consulting services for most of its PPM customers.

- The product must offer comprehensive, integrated project management, hybrid work, resource management, and reporting features and capabilities.
- The vendor and its product (or products) must demonstrate longevity in the APMR market, providing general availability and active marketing to end users for at least the past five consecutive years, and without any significant company, product or service disruptions.
- The vendor must be able to demonstrate significant APMR market presence, including market penetration, sales and support for multiple regions of the world.
- The vendor must be able to demonstrate a viable, proven and evolving SaaS strategy.
- The vendor must demonstrate a solid product development and innovation cadence shorter than 12-month intervals.
- The vendor must have secured at least 10 new APMR customers (not repeat business or renewals) during the past 12 months.
- The vendor must have at least \$5 million in annual APMR software revenue, or reliable financial backing.

Exclusion Criteria

- “Certified partners” of primary APMR technology vendors, systems implementers or consulting firms that use an APMR vendor’s technologies to deliver “products” or “solutions” for APMR are not included.
- ERP, IT service management (ITSM), sales force automation (SFA) and other similar platform vendors that offer APMR extensions or modules from their base platforms are not included.
- Vendors with a primary focus on and significant presence in niche or specialized PPM markets are not included.
- Products focused on the following use cases are not included:
 - Agile development and work management
 - Outsourced IT services or system integration project and work management
 - Client-facing professional services project and work management

- Collaborative work management

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 section and detailed in the subcriteria. This included those that offer them natively or via OEM agreements/partnerships. This also included an assessment of multiple, independent APMR products supporting differing APMR audiences and use cases. Ease of use, balanced with functional depth and cost-effective pricing, was examined, as well as how well and how completely the vendor and products support APMR depth and breadth.

Capabilities specifically needed for project managers, project contributors and PPM leaders were evaluated. Scalability of any applicable products and breadth of deployment options for varied APMR use cases were also assessed. Advancements in applying AI and robotic process automation (RPA) to APMR technology were measured, in terms of availability in the product and its adoption of it by customers in the field.

Overall viability (business unit, financial, strategy, organization): This was an assessment of the organization's overall 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 also noted.

Sales execution/pricing: We examined the provider's capabilities in all presales activities and the structure that supports them. This included 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: This criterion focuses on ability and proven track record in responding quickly and changing development and/or company direction to meet the needs of the market. This could be via evolving the marketplace through acquisition or other

means. How well and how quickly providers executed a multi-APMR product strategy to support an expansive APMR 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 considered the provider's history of responsiveness to customer requests. Its 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 could have been driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities. Digital marketing campaign activity was also measured.

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. We evaluated services/programs, including APMR process consulting services, offered at little or no extra cost, that enabled clients to be successful with the products. Levels of responsiveness in technical support or account support were 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 included the quality of the organizational structure, such as skills, experiences, programs, systems, the 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.

Ability to Execute Evaluation Criteria

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

Source: Gartner (September 2024)

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 APMR offerings. Providers that showed the highest degree of vision listen to and understand buyers’ wants and needs, and can shape or enhance those with their added vision. We examined the provider’s marked recognition of, and periodic departure from, core product development to exploratory product development or other activities (e.g., mergers and acquisitions [M&A]) to address the needs of an expansive APMR marketplace, and beyond it.

Marketing strategy: We recorded and evaluated whether the vendor had a clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: We measured the vendor's strategy for selling products using an 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.

Offering (product) strategy: This criterion examined the provider's approaches to product development and delivery, emphasizing differentiation, functionality, methodology and feature sets as they map to current and future requirements. 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. We also considered functionality supporting bottom-up and top-down APMR implementations, as well as depth and breadth of support for use cases defined in other Gartner PPM research. Scalability, depth and breadth of the product were analyzed. Process consulting options, including remote process consulting, were also noted. Integration with customers' core 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. We analyzed acquired products and tracked them 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. We also considered customer response to the vendor's product strategy and tangible customer benefits derived from product strategy. We also examined how the vendor applied AI and RPA to APM and reporting technology.

Business model: This criterion measured the soundness and logic of the provider's underlying business proposition. How well the business model provides value to customers was examined, as well as how far it reaches to support multiple APMR use cases.

Vertical/industry strategy: This criterion examined the provider's strategy for directing resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: We assessed the direct, related, complementary and synergistic layouts of resources, expertise, or capital for investment, consolidation, and defensive or preemptive purposes. 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 gauges the ability of the vendor to “lead the herd” of the market, rather than follow it.

Geographic strategy: We assessed the provider’s strategy for directing 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.

Completeness of Vision Evaluation Criteria

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

Source: Gartner (September 2024)

Quadrant Descriptions

Leaders

Leaders have a demonstrable understanding of the wide range of customer needs in the APMR market and are largely responsive to the more advanced levels of APMR methodology maturity within their customer base. Leaders actively engage in the market as thought leaders and help to drive customer success with strong foundational project and work management capabilities, coupled with well-defined implementation plans. These vendors have a Completeness of Vision exhibited by their product, marketing and sales capabilities, which are required to drive market acceptance on a global scale.

Challengers

Challengers have solid success markers such as growing market revenue, dedication to continuous innovation for meeting shifting customer needs and maintenance of a strong presence in the APMR market. Challengers also demonstrate reach into a diverse set of industries, strong foundations in project management best practices, and have consistently positive customer reviews about their performance, effective support models and operational strength.

Visionaries

Visionaries have identified a wide range of customer needs, growing momentum behind key market trends, and have adjusted their future product roadmap and business plans accordingly. All the vendors evaluated offer much of the same basic commodity functions and a very similar value proposition. However, Visionaries were able to demonstrate decisive plans to invest in product innovation that meets the needs of the dynamic work environment now and in the future. The entrants into this quadrant offer advancements such as data collection and insight analysis driven by AI, next-level dynamically linked dashboards informed by ML models, and promises of significant productivity gains achieved with NLP interfaces.

Niche Players

Niche Players have strengths in different capabilities of their products, often resonating more with customers from specific industries, from which they initially targeted their potential customer base. Movement toward the Challengers quadrant is going to be driven by advances in Niche Players' Ability to Execute in areas such as customer experience, market responsiveness and sales effectiveness.

Context

The Magic Quadrant for APMR tools assesses the viability of vendors offering products in this marketplace. A variety of evaluation criteria was used to produce a relative placement of each vendor against those criteria. This analysis is complemented by the **Critical Capabilities for Adaptive Project Management and Reporting**, which analyzes 10 key capabilities across four use cases. The use-case filter helps buyers prioritize the capabilities that have the greatest beneficial impact from APMR products offered by these vendors. Gartner strongly recommends that organizations use this research in conjunction with the Critical Capabilities companion research, Gartner Peer Insights and other Gartner research to define their requirements and select solutions that match their needs.

To select the best tool to support adaptive project management methodology:

- Ensure APMR tool functionality is fit-for-purpose by assessing the capabilities and features that complement the organization's maturation, support the mix of delivery frameworks and align with your projected use cases.
- Facilitate user adoption by qualifying the tool's ease of use, productivity and collaboration capabilities, as well as the extent of the vendor's implementation and support services.
- Determine the tool's architecture alignment by evaluating the solution's ability to support your organization's user interface and transparency needs, and its deployment and security requirements.

Market Overview

There are, inevitably, mixed levels of execution maturity within organizations. Each maturity level comes with its own challenges and has separate needs from the organization's tools of choice. We outline these below; however, despite maturity differences, each organization is on a continuous journey of maturation in order to navigate the anticipated industry transformation over the next few years.

Enablement: Scaling and Productivity Challenges

Project managers are challenged with navigating team dynamics and productivity in an increasingly complex environment. Organizations that enable APMR capabilities across their

organization are focused on delivering greater productivity and seizing opportunities to do more, or continuing to deliver with reduced capacity. Prioritization and strategic alignment are key.

These organizations look for their APMR tools to support teams that are building shared digital capabilities, to further their change management competencies. Enablement emphasizes the key areas of shared responsibility or engagement: demand management, prioritization, resource allocation, project and work effort management, and out-of-the-box reporting for multiple stakeholder types.

Optimization: Visibility of Value and Impact of Disruption

The visibility of value, both actualized and anticipated, is paramount to driving the strategic decision making necessary to navigate the external disruptions that impact organizations' ability to deliver on their business targets and strategic plans.

Building upon their solid APMR competencies across the organization, vendors need to adapt governance styles that aid agility, modernize their capacity/resource management across operating models and increase autonomous decision making throughout their hierarchy. They recognize the impact of portfolio interdependencies on their ability to optimize financial management and value-based decision making. Vendors must leverage the data and analytics, AI, RPA, NLP and ML capabilities of the more advanced toolsets in the organization. Organizations at the higher end of this maturity scale extend their efforts to include experimentation with customizable analytics and enhanced communications within no-code/low-code environments.

Transformation: Risk Management and the Adaptive Frameworks to Support It

Organizations that want to transform by maximizing their investment in digital capabilities and products recognize the importance of a strong risk culture. Their APMR tools need to foster genuine ownership and responsibility for risk management, balancing frontline employees' decision making with executive-level accountability for cultural or risk deficiencies.

These organizations need their APMR technology to support all elements of the organization in transforming the business, operating model or both. True, coordinated transformation is impossible without an enterprisewide perspective or the ability to connect and foster

consensus among the people, processes and culture, supporting the organization through internal and external disruption.

These APMR tools must account for the fact that transformation efforts are supported by multiple technical solutions that provide a wealth of digital capabilities. They build strong integrations to the organization's foundational technical platforms and established toolsets to provide a connective mesh of data that drives decision making at all levels. This ensures maximum value is achieved with each interaction between change and routine work. These highly digital and complex organizations require data transparency, automation and zero-trust security to enable the required flexibility within acceptable risk levels.

Conclusion

In an ever-evolving organization with mixed levels of maturity and multiple operating models such as today's modern enterprise, APMR users must address cross-organization, cross-geography challenges in a flexible and agile way. If they don't, they will be left vulnerable to their competition, or fail to meet political pressures in the public sector. The ability to connect governance across organizations, business functions and geographies to achieve strategic outcomes is imperative. Providers in this Magic Quadrant are actively engaged in building capabilities to support the enterprisewide coordination of strategy delivery via project management best practices, agile methodologies, varied governance practices and the need for intelligent collaboration.

Vendors must also address the reality of a multimethodology environment where teams are tasked with caring for projects and products alongside the backdrop of operational activities. When evaluating and positioning the vendors included in this research, Gartner has placed emphasis on products with core capabilities that can help traditional project management coexist with other elements. These include agile, product management methodologies, and the ability to work with existing systems of record, such as a portfolio tool or a financial information system.

While the APMR market is crowded, vendors seek differentiation and are making enhancements to their products, including:

- Innovative product roadmaps to keep pace with growing customer demand for a convergence of features to meet the needs of adaptive project work management
- Interdependency management between service portfolios and strategic initiatives

- Efficient implementation approaches to enable fast onboarding of core capabilities for immediate organizational benefit
- Responsive customer support capabilities that provide training, configuration, integration and adoption services
- Reduced product complexity through seamless module integrations that deliver a comprehensive set of capabilities
- Leveraging GenAI capabilities to increase productivity

⊕ Evaluation Criteria Definitions

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