

Magic Quadrant for Collaborative Work Management

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Collaborative work management tools offer task-driven workspaces that enable users to plan, coordinate and automate tasks. Application leaders can use this Magic Quadrant to navigate the expanding CWM market and select suitable options for their business.

Market Definition/Description

Gartner defines the collaborative work management (CWM) market as the market for stand-alone software tools that provide task-driven workspaces to enable end users to plan, coordinate and automate their work. These tools provide an integrated assembly of user-friendly capabilities for work planning, in-context collaboration, content collaboration, workflow and automation, reporting, analysis and dashboarding, intelligent assistance, and use-case acceleration on a platform that handles data management and administrative operations. Tools are defined by their purpose (work planning and execution), target users and breadth of functionality.

CWM tools empower business users to:

- **Plan work activities** by breaking them into tasks, establishing task dependencies, and specifying timelines, resources or budgets.
- **Collaborate with peers** in activity team spaces to create and share relevant documentation, update plans based on new information, send or receive notifications, and discuss status or next steps.
- **Automate repetitive activities** by means of workflows or rules that trigger actions automatically, based on events and execution activity.
- **Observe work activity continuously** by means of dynamic, customizable, operational and management-level reports, and dashboards.
- **Operate at scale** by means of template management, batch operations to provide preconfigured team hubs with appropriate permissions, data management controls, and integration with other workplace and business applications.

Mandatory Features

- **Work planning** functionality for breaking work activities into tasks, establishing dependencies, and specifying timelines, resources and budgets.
- **In-context collaboration** functionality that provides team spaces where participants can discuss and share documentation relevant to a business activity, update plans based on new information, and send and receive notifications in the context of specific activities.

Common Features

- **Workflow and automation** functionality to automate repetitive activities by means of workflows or rules that trigger actions automatically, based on events and execution activity. Actions may include notifications, approval requests, data pulls from external sources and general data manipulation.
- **Reporting features, analytics and dashboards** that provide comprehensive search and analytical capabilities, including dynamic, customizable, operational and management-level reports — both for team members and different levels of management. These include reports on overall plans, status of execution, dependencies, bottlenecks, timelines and other aspects of work activity.
- **Content collaboration** features for composing new content by mixing text, rich media and dynamic data, as well as for sharing, editing, viewing and collaborating on existing content; also content version control and audit trails.
- **Intelligent assistance** for generating and manipulating content based on context and user prompting, offering guidance on how to use advanced product capabilities, and helping generate and optimize plans, workflows and reports.
- **Platform and operations** support that aggregates system data, including behavioral and other metadata, into a single database that users can query, explore and filter; administrative controls to manage users, data and work plans; and integration with other workplace and business applications.
- **Use-case accelerators** and prebuilt templates for specific work scenarios, such as work planning and execution; intake, triage and service operations; marketing work management; case management; management of team objectives and key results; product management; and professional services automation.

Magic Quadrant

Figure 1: Magic Quadrant for Collaborative Work Management





Gartner

Vendor Strengths and Cautions

Adobe

Adobe is a Challenger in this Magic Quadrant. Adobe Workfront aims to optimize the deployment and performance of business resources through its collaborative work management platform. The company has 70 offices worldwide, with employees split evenly between the U.S. and other regions. The product targets roles such as creative production, campaign management and IT management, addressing work planning, execution and automation. Key use cases include managing the content supply chain, centralizing work, digitizing processes and ensuring compliance. Innovative features include AI-driven form design, smart assignments and automated approval workflows. Adobe Workfront integrates with Adobe's tech stack to streamline work and enhance digital experiences.

Strengths

- **Viability:** Adobe Workfront benefits from the market presence, operational strength, partner ecosystem and synergies with adjacent products in the broader Adobe portfolio.
- **Product:** The product has strong content collaboration capabilities (e.g., proofing, reviews and approvals) along with planning, prioritization, automation, and workload and financial management for work scenarios such as marketing operations or digital experiences management.
- **Geographic Strategy:** Adobe Workfront is supported by an extensive network of local offices, staff, partners and data centers, which are distributed across multiple countries and regions.

Cautions

- **Product Strategy:** Adobe's incorporation of Workfront into its product suite primarily targets content-centric use cases such as marketing operations. While this focus on "powering the content supply chain" has successfully capitalized on Adobe's current customer base, it limits its visibility as a CWM solution for those outside the Adobe ecosystem. Adobe Workfront is seen on CWM product shortlists in Gartner customer inquiries much less frequently than the leaders in this market.
- **Ease of Use:** Workfront is complex to use, especially for novices. Its scripting and automation capabilities cannot be easily consumed by nontechnical users.
- **Pricing:** Adobe does not provide standard pricing; solutions are priced on a case-by-case basis, making pricing less transparent and more complex.

Airtable

Airtable is a Leader in this Magic Quadrant. Airtable's mission is to empower process owners to build intuitive, scalable no-code applications for business operations. The company is headquartered in San Francisco and has employees in several countries, including the U.K., France, Germany and Australia. The product targets roles such as product operations, marketing operations and IT operations, addressing needs like custom-made business processes, AI automation and comprehensive reporting. Key use cases include product management operations, content operations and enterprisewide objectives and key results (OKRs) tracking. Innovative features include AI-powered app creation and AI planning predictions.

Strengths

- **Product:** In addition to its core functionality, Airtable has introduced a new library of customizable apps that rely on centrally managed, shared data with bidirectional syncing across applications. These come with tools for builders and administrators to manage dependencies and usage patterns.
- **Intelligent Assistance:** Airtable offers AI-powered app creation with Airtable Cobuilder, with proactive assistance, data analysis, formula creation, automation rules and workflows from user prompts, and allows users to create context-specific assistants for conversational queries.

- **Viability:** Unlike many vendors in this market, Airtable is already profitable without compromising its ability to fund further strategic growth.

Cautions

- **Sales Strategy:** Airtable is in the early stages of developing its traditional reseller and distributor programs, although it does support a marketplace and has an active service partner program.
- **Geographic Strategy:** Airtable introduced European data residency in 2024, but is still evolving its regional physical, partner and data center presence. It also has gaps in language support of its product, which makes it less suitable for customers in less-well-served regions.
- **Certifications:** Despite adding Health Insurance Portability and Accountability Act (HIPAA) compliance in the last 12 months, Airtable still lacks accreditation and certification in other areas such as the Americans with Disabilities Act, WCAG 2.0 and Section 508, and FedRAMP.

Asana

Asana is a Leader in this Magic Quadrant. Asana's mission is to help its customers thrive by enabling teams to work together effortlessly. The company has 12 offices and a significant remote workforce spread across various regions. Asana's work management platform targets roles such as operations managers, program managers and marketing managers, addressing needs like in-context collaboration, project management and goal alignment. Key use cases include operations and project management, digital transformation and marketing campaigns. Innovative features include Asana's Work Graph for flexible planning, AI-driven work planning and centralized collaboration through Asana's Inbox. Asana's platform connects plans and goals to work, enhancing alignment and productivity.

Strengths

- **Marketing Strategy:** Asana has strong brand recognition within the CWM market, and a substantial and expanding customer base, including numerous clients with over 1,000 users. The company is consistently considered by prospective customers.
- **Ecosystem:** Asana has an extensive partner network with a comprehensive certification program. There is also a customer Ambassador program that provides access to additional resources and connects members to each other. The vendor has a reputation for thought leadership and links to academia through the Work Innovation Lab.
- **Geographic Strategy:** Asana maintains a significant physical presence in multiple regions, supported by a broad network of local partners, making it a viable option for clients with diverse or global operations.

Cautions

- **Industry Solutions:** Asana is still evolving its sales programs to better target specific vertical industries and business functions.

- **Sales Execution:** Although Asana continues to experience consistent customer growth, and a significant reduction in operating losses, the number of employees is static, and the revenue growth rate is declining.
- **Customer Experience:** Among generally positive feedback from customers on ease of deployment, some have noted that there is a learning curve for new users.

Atlassian

Atlassian is a Challenger in this Magic Quadrant. Atlassian's mission is to harness the potential of every team through the collaborative work management capabilities of its product, Jira. The company has 12 offices globally. Jira targets roles in program and project management, marketing and engineering, addressing needs like cross-functional collaboration, goal alignment and workflow automation. Key use cases include team projects, content collaboration and goal prioritization. Innovative features include AI-driven support for converting unstructured work to structured plans, customizable workflows, and integrations with Confluence and Loom. Jira's platform enhances clarity, collaboration and productivity across technology and business teams.

Strengths

- **Marketing Execution:** Atlassian maintains a leading presence in adjacent markets. It is well-regarded within IT organizations, which creates an opportunity to promote Jira for use by business teams.
- **Pricing:** Atlassian's pricing strategy for the core product is straightforward and competitive, making large-scale deployments more cost-effective. Also, folding Jira Work Management into the core Jira product has simplified Atlassian's product portfolio.
- **Ecosystem:** Atlassian has a comprehensive certification program for all channel partners, data centers outside the U.S. and Europe, and thousands of platform partners active in the Atlassian Marketplace, which includes customer-created apps that can be discovered, tried and purchased.

Cautions

- **Use Case Support:** Jira lacks deep functionality, such as digital asset management, resource allocation and time tracking, that is relevant to marketing operations, case management and product management.
- **Product Strategy:** Buyers and users still need to navigate multiple overlapping or complementary Atlassian products such as Trello and Confluence.
- **Sales and Marketing Strategy:** Atlassian has yet to fully exploit the opportunity to appeal directly to business decision makers outside of IT. Furthermore, the company's vertical industry sales and marketing efforts remain limited and underdeveloped.

ClickUp

ClickUp is a Visionary in this Magic Quadrant. Its focus is on worker and team productivity. ClickUp is headquartered in the U.S., has five regional offices, and partners with WeWork to offer several hundred more hub locations globally for remote employees. The product targets roles such as project managers, marketing managers and IT managers, addressing centralized collaboration, improved visibility and streamlined workflows. Key use cases include team projects, agile development and planning. Innovative features include turning text into tasks, visualizing work sites with Map view and AI-powered automation rules. ClickUp's platform enhances productivity by centralizing work and communications in one place.

Strengths

- **Product:** ClickUp provides a broad set of noncore CWM capabilities for general team productivity that includes document authoring, dynamic document templates, whiteboards, rich integrated video and audio chat with AI support, and universal search.
- **Pricing:** ClickUp has simple, transparent and competitive pricing with no extras for AI assistance, connectors to other applications, admin consoles or data usage.
- **Market Understanding:** ClickUp's vision, strategic positioning and product roadmap are well-aligned with the needs and priorities of customers in the CWM market.

Cautions

- **Ecosystem:** ClickUp is still evolving its partner ecosystem and its capacity to target specific industries and business functions.
- **Functionality:** ClickUp has weaknesses in workflow and automation, with limited support for complex logic beyond automation rules, no visual workflow canvas, and no versioning or testing/sandbox options.
- **Sales Strategy:** ClickUp has no vertical industry sales program, limited language support and limited physical presence outside the U.S., particularly in Asia.

monday.com

monday.com is a Leader in this Magic Quadrant. monday.com's mission is to empower organizations with a central work hub that drives collaboration around visible work. The company is headquartered in Israel and the U.S., with nine other offices globally. The monday.com work management platform targets roles such as expert users, citizen developers, project managers and operations directors, addressing needs like operational efficiency, visibility and cross-team collaboration. Key use cases include work planning and execution, team objectives and key results management, and marketing work management. Innovative features include flexible no-code reusable building blocks, AI integration for task generation and real-time dynamic dashboards. monday.com's platform enhances operational efficiency and collaboration across different departments.

Strengths

- **Platform:** monday.com has made significant platform investments. These include enhanced data life cycle management, and improved performance for large deployments with thousands of projects and millions of tasks. The platform also offers secure workspaces that limit downloads and sharing, and API access to the monday graph for user management and the audit logs.
- **Use Case Support:** monday.com showcases and sells its product through productized versions tailored for various use cases, such as marketing, software development operations, CRM and service management. These offerings are beginning to compete with specialized business applications in different markets.
- **Marketing Execution:** monday.com has successfully implemented a marketing strategy, including a freemium program, that continues to support its brand recognition. It is commonly shortlisted by customers seeking CWM products.

Cautions

- **Product Strategy:** monday.com is beginning to compete in multiple business application markets via its use case accelerators that are effectively different products, which may stretch its resources and leadership attention.
- **Pricing:** Pricing for the core product is simple and transparent, but the separate pricing for use case accelerators may complicate buying monday.com products for multipurpose use cases.
- **Customer Experience:** Among generally positive feedback from customers, some expressed concerns about a steep learning curve for more advanced functionality.

Quickbase

Quickbase is a Niche Player in this Magic Quadrant. It is headquartered in the U.S., with limited presence in other regions. Quickbase's mission is to enable businesses that rely on fragmented solutions and manual processes with its AI-enabled, industry-tailored work management platform. The product targets roles such as project managers, frontline workers and supply chain managers, addressing needs like managing projects, connecting data across systems and enhancing collaboration. Key use cases include project management, asset management and supply chain management. Innovative features include customizable applications without coding, advanced planning tools and AI integration for automation.

Strengths

- **Product Functionality:** Quickbase introduced new functionality to fill gaps in contextual conversations, document generation, an AI Smart Builder for custom applications and the AI-driven recommended reports feature.
- **Platform:** The platform capabilities include a scalable in-memory database, sensitive data scanner with pattern matching, the option of a mixed on-premises/cloud deployment, and exporting a complete markup text specification of Quickbase plans or applications for further human or machine processing.

- **Use Case Accelerators:** Beyond supporting a growing set of general work use cases (unusually including support for frontline work), Quickbase is also creating a set of rich, customizable vertical industry “Pro Apps” (e.g., for construction or property management). These come with prebuilt data models, workflows, and relevant expertise for both sales and support.

Cautions

- **Market Alignment:** While Quickbase is meeting CWM needs, its strength is as a development platform aimed at speeding up the creation of advanced work management applications by fusion teams. Consequently, the expected technical competency level among target users may be higher than that of the broader CWM market.
- **Market Presence:** Given the focus on application building and automation, rather than on general team coordination, Quickbase has a smaller number of users. Also, its sales cycles tend to be longer, and its pricing tends to be higher than the leading competitors in this market.
- **Geographic Strategy:** Quickbase has a limited physical regional presence and is still evolving its partner ecosystem, which is currently mostly limited to North America.

Smartsheet

Smartsheet is a Leader in this Magic Quadrant. It is headquartered in the U.S., and has six offices globally. Smartsheet’s mission is to help organizations streamline processes through automation, improve collaboration, coordinate work throughout an organization, and empower users closest to the problem to build solutions with minimal technical skills. The product targets roles such as project managers, line of business leaders and operations executives, addressing needs like planning work, doing work efficiently and scaling work. Key use cases include project and portfolio management, strategic transformation, service delivery, and marketing and content management. Innovative features include flexible work management tools, advanced integrated proofing tools and support for automation rules. Smartsheet is currently in the process of being acquired by private equity firms, taking the company private again.

Strengths

- **Sales Execution:** Smartsheet continues to expand its customer base, with many large deployments via direct sales and partner programs, and by growing existing accounts. Smartsheet has built an extensive partner network with programs tailored to different types and tiers of partners.
- **Customer Experience:** Smartsheet has a strong customer focus that includes an annual adoption review (Value Realization Snapshot), extensive training and certification programs, and dedicated professional services.
- **Product:** Smartsheet’s initial set of AI-powered tools has several features. It offers users guided assistance and support, generates charts and reports, tracks metrics, analyzes sentiment, and summarizes work status. It also uses natural language prompts to create working formulas from simple sentences. These tools enhance data analysis and workflow automation.

Cautions

- **Market Momentum:** Smartsheet is in the process of becoming a private company again, which will likely have an impact on visibility into its strategy, roadmap and results.
- **Pricing:** Smartsheet introduced a new simplified pricing model in 2024 that included a lower subscription price with provisional licensing that enables end users to use all product capabilities without interruption. However, it also removed the free collaborator option, which may result in higher costs in some cases. Smartsheet enterprise subscriptions include intelligent assistance, data usage and basic resource workload tracking; however, there are additional costs for some integration, reporting, resource management and administrative capabilities.
- **User Experience:** Some customers pointed out difficulties with a steep learning curve, and the complexity of integration and formula creation.

Wrike

Wrike is a Leader in this Magic Quadrant. It is headquartered in the U.S., and has nine regional offices and an offshore center of excellence in India. Wrike's mission is to help organizations work as one, automate routine tasks and focus on impactful work. Wrike targets roles such as project managers, client services managers and product managers. The product addresses needs for a scalable platform, workflow automation and alignment of work progress with business outcomes. Key use cases include project portfolio management, client service delivery and marketing project management. Innovative features include AI-enhanced collaboration, robust asset proofing and advanced dashboards.

Strengths

- **Product:** Wrike has updated its user experience with a more intuitive and flexible design across the platform and introduced AI features for document summarization and subtask creation. Additionally, Wrike recently introduced Datahub, which enables domain-specific data models that can be customized and mixed with data from multiple sources within a hub that provides usage visibility and governance.
- **Viability:** Wrike was one of the early entrants in the CWM market, and its continued focus on organic growth and prudent marketing enabled it to conserve cash, bringing it closer to profitability than other vendors.
- **Customer Experience:** Customers rated Wrike consistently high in terms of capabilities and use cases, emphasizing satisfaction with overall user experience, affordability and its compliance capabilities.

Cautions

- **Sales Execution:** Wrike is reorganizing its partner program, which could hinder growth. However, Wrike reports that deepening partnerships and launching a more robust marketplace are key initiatives in 2025.

- **Regional Presence:** Wrike has a presence in most regions, but the scale of its regional presence is behind that of its leading competitors.
- **Market Momentum:** Changes in ownership, leadership and regional operations contributed to low growth in customer numbers and revenue, a reduction in employee numbers, and generally less market visibility in 2023. In 2024, new investments are being made to scale profitable growth.

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

Notion was not included in this Magic Quadrant market assessment as Notion is primarily used as a collaborative content workspace (CCW) application rather than as a CWM tool for work planning and execution.

Inclusion and Exclusion Criteria

To qualify for inclusion, providers need to meet the following criteria:

- A provider must demonstrate active participation in the CWM market as a pure-play provider of stand-alone CWM software that caters to the technology needs of end users and business teams and meets the Gartner definition for the CWM market.
- A provider's CWM software product must not require the purchase of a separate, non-CWM software platform from the provider to obtain CWM functionality.
- The software provider must demonstrate a solid track record of successful CWM technology sales, deployments and delivery of companion consulting services, supporting CWM use cases.
- The software products must offer integrated work planning, in-context collaboration, content collaboration, workflow and automation, reporting, analysis and dashboarding, intelligent assistance, and use-case acceleration on a platform that handles data management and administrative operations.
- The provider and its product must demonstrate stability and longevity in the open market, providing product general availability and active marketing to business users for at least five years.

- The provider must be able to demonstrate substantial CWM market presence, including market penetration, and sales and support for multiple regions, including North America, Europe and Asia/Pacific. Also at least 20% of the revenue associated with regions outside the primary region in which the provider operates.
- The provider must have at least \$70 million or equivalent in revenue from user subscriptions; or at least 300 full-time employees dedicated to its product in the CWM market in the calendar year 2023.
- The provider must have secured at least 300 new (not repeat business or renewals), active, paying (not free) customers (logos). Alternatively, they must have at least 30,000 new (not repeat business or renewals) paying (not free) end-user subscriptions for its CWM product in the calendar year 2023.
- The provider must have at least 100 current, active customers with annual contract value exceeding \$100,000; or 100 current paying customers with more than 1,000 users each for its CWM product.
- The provider must rank among the top 20 vendors of CWM software according to a composite Customer Interest Indicator score. This is calculated by Gartner based on inquiry volume, competitor mentions in Peer Insights reviews, number of Twitter and LinkedIn followers, number of job postings, number of Gartner.com searches, and Google trends data.

Evaluation Criteria

Ability to Execute

Gartner analysts assess vendors based on the quality and efficiency of their processes, systems, methods or procedures that foster competitive, efficient and effective provider performance, ultimately contributing to revenue, retention and reputation. Vendors are evaluated on their success in achieving their vision.

Criteria for product or service, and customer experience are weighted high as these typically drive vendor selection among potential buyers. Buyers express the most interest in product functionality, the vendor's ability to deliver against objectives, and the vendor's reputation and overall satisfaction among existing customers.

Overall viability is weighted as medium. This indicates if vendors are experiencing growth and have an engaged workforce, alongside sufficient attention from senior leadership for their product in the CWM market.

Criteria for sales execution/pricing, and marketing execution are weighted low. While not heavily weighted, a vendor's ability to build brand-name recognition, sell successfully in different geographies and vertical markets, and effectively utilize indirect channels and partners are becoming even more important in an increasingly competitive market.

Table 1: Ability to Execute Evaluation Criteria

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

Source: Gartner (December 2024)

Completeness of Vision

Gartner analysts assess vendors based on their capacity to effectively communicate their current and future market strategies, innovation, understanding of customer needs, and competitive positioning. Additionally, they evaluate how well these vendors align with customer requirements. Ultimately, the vendors are rated on their ability to leverage market dynamics to generate opportunities.

Offering (product) strategy, is weighted high. In terms of vision, this is the most relevant in a buyer's decision. Buyers are looking for vendors that understand the trends and changing dynamics in business-led work management, offer depth and breadth in their product capabilities, and have a strong product roadmap.

Innovation is weighted medium, reflecting the ability of the vendor to remain relevant, competitive and able to take advantage of general technology opportunities such as the use of generative AI.

Criteria for market understanding, marketing strategy, sales strategy and geographic strategy are factored into our assessment but weighted low. This is to ensure that vendors have a good

understanding of buyer needs and a strategy to establish market visibility. It also ensures that they have adequate resources and channels to grow their business by attracting and keeping buyers in different industries and geographies.

Table 2: Completeness of Vision Evaluation Criteria

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

Source: Gartner (December 2024)

Quadrant Descriptions

Leaders

Leaders exhibit comprehension of essential product features. They are dedicated to ensuring customer success and meeting the expectations of buyers in this market. They have a track record of strong performance and have influence over the market’s trajectory. Leaders continually enhance their offerings, delivering platforms that are functionally robust and demonstrably benefit customers. They possess a well-defined product roadmap aimed at strengthening the product’s market position and safeguarding buyers’ investments. Furthermore, they cater to a variety of use

cases and address emerging business challenges. Their extensive network of partners provides localized support and services across most regions globally.

Challengers

Challengers are positioned for success in this market, yet they may face limitations in specific use cases and exhibit weaknesses in their product capabilities. Their vision might be constrained by the absence of a unified strategy across their product portfolio. Additionally, they could trail behind Leaders regarding effective marketing, sales channels, industry-specific focus and innovation. Though Challengers possess the size and product strength to compete globally, their execution may not be equally effective in all regions.

Visionaries

Visionaries are at the forefront of technological innovation, offering advanced capabilities and strong future-oriented product strategies. These vendors can act as thought leaders, driving market trends and investing in transformative technologies. However, they may face challenges in execution, market presence and customer support, making them higher-risk but potentially higher-reward choices. Visionaries may lack a consistent track record, broad use case support or a track record in large-scale deployments, but they can influence the market's direction and provide early access to breakthrough features.

Niche Players

Niche Players typically specialize in one geographical or functional area. They may be newer entrants to the market or small companies just starting to succeed, or they may be focused on a specific subset of use cases. They may not demonstrate the ability to consistently handle large deployments across multiple geographies or may lack strong sales. However, their technology offerings and degree of customer satisfaction within that segment are often excellent. Niche Players' offerings can be suitable for organizations that require local presence and support, want a close relationship with a provider, or seek a platform that addresses specific industry use cases and functional requirements. Niche Players that can fulfill these specific requirements may offset the viability risks associated with smaller vendors.

Context

This Magic Quadrant assesses vendors' capabilities on the basis of their execution and future development plans. As vendors and the market are evolving, the assessments may be valid for only one point in time.

Clients should not use this Magic Quadrant in isolation as a tool for selecting vendors and products. They should treat it as one reference point among the many required to identify the most suitable vendor and product. Clients should not disqualify a provider simply because it is not in this Magic Quadrant. Gartner's inclusion criteria results in analyzing the most established providers in the market, but other regional or local IT service providers may present better alternatives for your business requirements. When selecting a platform, use this Magic Quadrant in combination with the report on [Critical Capabilities for Collaborative Work Management](#).

We also recommend using Gartner's client inquiry service. A Gartner expert can help shortlist the most suitable candidates for specific client requirements and assist with an analysis of shortlisted candidates.

Clients should not ascribe their own definitions of Completeness of Vision or Ability to Execute to this Magic Quadrant (they often incorrectly equate these with product vision and market share, respectively). The Magic Quadrant methodology uses a range of criteria to determine a vendor's position, as shown by the Evaluation Criteria section above.

Market Overview

CWM tools serve a wide array of business functions. They are commonly employed by various business teams to plan, execute and monitor activities that either aren't supported or aren't well-supported by existing applications. These tools are often used when suitable market applications are unavailable or when available options are too rigid or expensive for the organization.

In the 2024 Gartner Digital Worker Survey, ¹ digital workers were asked about the frequency with which they streamline work tasks by combining applications using basic automation tools. The results indicate that 38% of respondents do this frequently, usually or always. This suggests there is significant appetite for more systematic ways to address the problem of streamlining work. Using a CWM tool to streamline work tasks may involve data integration with other applications, enabling control, visibility, automation and collaboration within otherwise fragmented value chains.

In general, CWM tools empower business users to:

- Plan work activities by breaking them into tasks, establishing dependencies and specifying timelines, resources or budgets.
- Collaborate with their peers through activity team spaces where they can create and share documentation that is relevant to a business activity. Workers also can use the team space to update the plan based on new information, send or receive notifications, and discuss the status or next steps in the context of specific activities.
- Automate repetitive activities through workflows or rules that trigger actions automatically based on events and execution activity. Actions include notifications, approval requests, data pulls from external sources and general data manipulation.
- Observe continuously the work activity to guide decisions by providing dynamic, customizable, operational and management reports and dashboards for team members or different levels of management. These include reports on the overall plans, the status of execution, dependencies, bottlenecks, timelines and other aspects of the work activity.
- Operate at scale through templates for common work activities, batch operations to provision preconfigured team hubs with appropriate permissions, data management controls, and integration with other workplace and business applications.

The CWM market is growing rapidly at an estimated 16% per year (see [Forecast Analysis: Social and Collaboration Software in the Workplace, Worldwide](#)). The leading three vendors in this market now make up more than two-thirds of the total market share. However, this is still a growing market with opportunities for smaller vendors, some of which are experiencing high growth rates.

The evolution of the CWM market is driven by the following factors:

- **Increasing customer demand for flexible work support:** Buyers are beginning to see the importance of CWM in collaborative work contexts that do not necessarily warrant the purchase or building of new applications. CWM tools enable business users to effectively plan and carry out tasks such as everyday or ad hoc task planning, case tracking, service operations, product operations, and setting and tracking team objectives and key results. In addition, new generative AI capabilities make plan creation, analysis and optimization more accessible, widening the scope of CWM tools as viable options for no-code development.
- **Interest from adjacent market vendors:** Vendors from related markets are stepping into this space, including those specializing in project management, workstream collaboration, work hubs/cloud office suites, packaged intranet products, development tools, employee communications, frontline worker applications and business applications. This is evident in the variety and diversity of available products in the CWM market, with vendors recognizing the opportunity to market their solutions to a broader user base.
- **Remote and hybrid work:** Meetings and conversational channels lack structured context, which prevents them from achieving clarity and alignment. CWM tools serve as a natural enhancement to workstream collaboration, visual collaboration tools and meeting solutions.
- **Demand-generation strategies:** Many vendors are expanding their market share through freemium products aimed directly at business users and small teams. They are also capitalizing on departmental budgets by offering prebuilt work templates for tasks such as marketing work management, objectives and key results, and intake management. As a result, many organizations invest in multiple products, each being applied within a specific business domain.

Common obstacles hampering the adoption and successful deployment of CWM tools include:

- **Opportunistic deployments resulting in disparate efforts and tools:** Many organizations introduce CWM solutions through end users or small departmental initiatives, leading to tactical deployments without a comprehensive plan for scaling operations.
- **Inexperience with large-scale governance:** Business users adeptly use CWM tools to develop applications for work modeling or automation, affecting roles and responsibilities related to quality control, data management, release management, maintenance and long-term support.

- **Cultural attitudes and skills readiness:** Some business units are not used to working transparently or resist greater autonomy. Business managers often do not view managing technology solutions as their role and lack the necessary skills for effective usage.
- **Vendor and product risk:** Market dynamics show that some vendors are small and prioritize market share over profitability, while major platform vendors have not yet fully entered the market. This results in higher vendor and product risk for buyers compared to more established markets.
- **Frontline work requirements:** CWM tools are primarily designed for the general work management needs of office workers, whereas frontline work demands features like shift management and integration with plant, retail systems and workforce management platforms. The lack of support for frontline work limits the relevance of CWM solutions.

Evidence

¹ **2024 Gartner Digital Worker Survey.** This survey sought to understand workers' technological and workplace experience and sentiments. The research was conducted online from April through July 2024 among 5,141 respondents, who were from the U.S. (n = 1,121), Australia (n = 1,086), India (n = 996), the U.K. (n = 973) and China (n = 965). Participants were screened for full-time employment in organizations with 100 or more employees and were required to use digital technology for work purposes. Ages ranged from 18 through 74 years old, with quotas and weighting applied for age, gender, region and income, so that results were representative of countries' working populations. We defined "digital technology" as including any combination of technological devices (such as laptops, smartphones and tablets), applications and web services that people use for communication, information or productivity. Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

The evaluation of providers' capabilities for this Magic Quadrant and the related Critical Capabilities research came from both primary and secondary research carried out by Gartner.

The primary research used for this Magic Quadrant includes:

- A detailed provider survey conducted between June and July 2024.
- Recorded demos and presentations by each provider, showcasing specific aspects of its product, including support for different use-case scenarios.

Secondary research used includes the following, all taken from the last 12 months:

- Client inquiries taken by Gartner on a provider's CWM product.
- Client satisfaction and verbatim comments on the performance of individual providers taken from client reviews on Gartner Peer Insights.

- Insight from other Gartner analysts who have spoken with the providers or have spoken to clients of the providers about their offerings.
- Briefings delivered by providers to Gartner outside of the Magic Quadrant and Critical Capabilities processes on aspects of providers' capabilities.
- Press releases and publicly available information, including company websites and financial reports.
- Views and comments provided by other Gartner analysts as part of the peer review process.

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

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

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