

Magic Quadrant for Customer Service Knowledge Management Systems

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AI-powered taxonomy automation, knowledge capture, creation, and curation are making knowledge more fluid and responsive to business needs, rendering conventional KM practices obsolete. This research helps customer service and support technology leaders identify KM innovations that enable the transformation of service operations and customer experience.

Market Definition/Description

Gartner defines a customer service knowledge management system as a collection of technologies that enable the timely provision of accurate, contextually relevant information to an organization's customers and customer service and support employees. They provide content capture, creation, contextualization and secure storage as core capabilities, in addition to search and content aggregation.

The purpose of a customer service knowledge management system (CS-KMS) is to serve as a single trustworthy source of information that ensures uniform and accurate knowledge is made available to users. Organizations use these systems to provide internal customer service agents with current, accurate, trusted knowledge and to provide timely, accurate information to customers seeking self-service support. CS-KMS platforms or tools are used to replace traditional knowledge bases; manage content; and power conversational AI, chatbots and AI agents. They address business problems such as inconsistent service levels and information

across channels, difficulty for users or agents to find needed information, and the manual burden of keeping knowledge content updated and complete.

CS-KMS platforms or tools help organizations achieve several positive outcomes. They can enhance service consistency and improve client interactions, as well as improve operational efficiency. By providing easily accessible and consistent information, these systems aim to improve quality and consistency of search results, support the efficient onboarding of new employees, and generally lead to a better customer experience (CX). AI-powered CS-KMS features enable automation, like generating knowledge articles from call interactions, and allow for more advanced applications such as retrieval-augmented generation (RAG) to deliver context-specific answers from proprietary data.

Mandatory Features

Mandatory capabilities, and their subcapabilities, for this market include:

- **End-user engagement**, which ranks and presents the most relevant answers to a specific query, or ingests a single relevant actionable insight to a moment in a user journey, and additionally gives a user the ability to navigate a corpus of content. This includes the following subcapabilities:
 - Guided assistance: Refers to AI assistants, virtual customer assistants and agents (VCAs), chatbots, and type-ahead and autocomplete automations.
 - Intelligent search: Uses natural language technologies to improve the value of search for users by processing the relationship between words as a proxy for meaning.
 - Web portals and conversational user interfaces.
- **Curation and contextualization**, which supports the discovery/retrieval, sorting, clustering and organizing of content assets for delivery at relevant moments in the user journey, including metadata, search and monitoring/reporting/analyzing performance. This includes the following subcapabilities:
 - Classification and taxonomy management
 - Insight engine
 - Vector embedding/autotagging

- Knowledge life cycle management, which captures, assesses, authors/creates, reviews, edits, publishes, controls and retires knowledge assets. This includes the following subcapabilities:
 - Discovery, harvesting and capture of new content
 - Content creation and authoring, including automated generation of draft content
 - Dynamic editor
 - Content auditing, verification, maintenance and corpus hygiene
 - Content storage with integrated data sovereignty and security controls

Optional Features

The optional features for this market include:

- Atomized authoring
- AI-powered taxonomy automation
- Knowledge graph
- Automated capture, creation and curation of content
- Data quality and content accuracy automation

Magic Quadrant

Figure 1: Magic Quadrant for Customer Service Knowledge Management Systems





Gartner

Vendor Strengths and Cautions

eGain

eGain, a public company, is a Leader in this Magic Quadrant. Its AI Knowledge Hub enables AI-ready knowledge in real time. Operations are mostly in North America, the U.K., and Western Europe, with clients typically in highly regulated sectors such as banking and healthcare that have specialized knowledge, risk mitigation, and data sovereignty requirements. Recent releases include Composer, a full-stack developer platform to build agentic flows that integrate knowledge retrieval, answer generation, and customer experience workflows across CCaaS and CRM platforms. eGain's roadmap includes expanding trusted knowledge into the

enterprise, providing a connective layer for AI workers operating across human resources, legal, finance, and operations.

Strengths

- **Focus on AI KnowledgeOps:** eGain emphasizes the central role knowledge plays in successful AI deployments and the importance of maintaining high-quality knowledge as data. This approach is evident in the detailed analytics it offers to measure content health, which is critical for organizations that produce a high volume of knowledge assets.
- **Geographic strategy:** eGain leverages direct sales in core markets and distributor-led sales in emerging markets, paired with excellent multilingual support. This strategy enables organizations to standardize on a knowledge management platform across regions with diverse needs.
- **Core authoring capability:** eGain combines AI-generated, human-led, and rule-based authoring to streamline enterprise knowledge creation. This single-sourcing approach with reusable content blocks and conditional assembly allows organizations to easily push consistent updates and context-driven content variations across all channels, regions, and users.

Cautions

- **Vertical strategy:** eGain's platform is only beginning to execute on a vertical strategy and has yet to offer vertical-specific taxonomies, templates, or other aids. As a result, prospective customers with strong compliance requirements should account for added implementation complexity.
- **Brand visibility:** eGain's historical reliance on its inbound, content-driven marketing model has resulted in low brand visibility. Customer service and support leaders may find it difficult to get executive buy-in to invest in its product.
- **Search capabilities:** eGain prioritizes search precision through personalized content scope and knowledge graphs, while forgoing recall-enhancing features like intelligent query clustering and synonym expansion. Organizations managing large volumes of content must evaluate this precision-over-recall trade-off to determine if the platform can meet their specific requirements.

KMS Lighthouse, a private company, is a Niche Player in this Magic Quadrant. Its CS-KMS solution — also called KMS Lighthouse — combines AI capabilities, governance, and omnichannel integrations. The company's operations are mostly in North America and Europe, with customers mostly in financial services, healthcare, and telecom. Recent updates include a Microsoft Azure OpenAI-powered AI assistant with retrieval-augmented generation (RAG) for accurate, contextual responses using curated knowledge articles. Its "AskAI Answers" and "AI Assistant" use natural language, deterministic answer delivery and semantic retrieval from approved knowledge assets. KMS Lighthouse's roadmap includes next-generation agentic authoring to evolve current features into an autonomous content operations engine that automatically supports authoring, reduces repetitive errors, and improves efficiency.

Strengths

- **Market strategy:** KMS Lighthouse has aligned its strategy with the transition to agentic AI by developing features that automate missing knowledge detection and draft new articles. This allows organizations to maintain updated knowledge bases with reduced manual intervention.
- **Product strategy:** KMS Lighthouse utilizes a monthly release cycle to deliver continuous platform enhancements and new capabilities. This enables enterprises to easily adopt emerging AI innovations and support their customer service operations.
- **Customer experience:** KMS Lighthouse provides structured customer success programs featuring onboarding frameworks, regular business reviews, and proactive account monitoring. This ensures organizations receive ongoing guidance to optimize knowledge workflows and AI initiatives.

Cautions

- **Vertical strategy:** New industry-specific standards and regulations are emerging across multiple verticals. KMS Lighthouse has indicated that it does not plan to address these evolving requirements within its vertical strategy over the next year. As a result, the platform may not be able to fully support organizations seeking compliance-aware content structures aligned with new mandates.
- **Co-editing capabilities:** KMS Lighthouse does not support real-time co-editing for authors, which may introduce friction in the content creation and management pipeline, potentially impacting gains from the GenAI authoring process.

- **Customer experience:** KMS Lighthouse is primarily an answer-centric knowledge platform, optimized for modular, reusable knowledge rather than document-centric content. PDFs designed as full-length documents may require transformation into structured knowledge components to fully leverage the platform's capabilities.

NiCE

NiCE, a public company, is a Challenger in this Magic Quadrant. Its NiCE Knowledge supports environments requiring strong governance, auditability, and policy-controlled delivery. Its operations are based in the Americas, EMEA, and Asia/Pacific, and NiCE Knowledge is sold primarily into NiCE's CXone CCaaS environments. Most of its customers are in North America, EMEA, and Asia/Pacific in various verticals, including information technology and services, financial services, and healthcare. Recent innovations include GenAI-powered knowledge creation and conversational AI integration. The company's roadmap focuses on AI content life cycle management, RAG pipelines, and trusted answers to make NiCE Knowledge NiCE's GenAI grounding system.

NiCE declined requests for supplemental information. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Integration with NiCE CXone platform:** When deployed with CXone CCaaS, NiCE Knowledge benefits from the broader platform's contextual delivery, analytics, and AI-assisted workflows. This tight integration strengthens NiCE's execution environments.
- **Regulated and risk-sensitive deployments:** NiCE Knowledge emphasizes answer governance, auditability, and policy-controlled knowledge delivery. These capabilities make it attractive to organizations with strict regulatory and compliance requirements.
- **Content governance, audit controls:** NiCE Knowledge provides robust authoring, approval, and versioning workflows that enable enterprises to trace content provenance and demonstrate compliance.

Cautions

- **Not typically positioned as stand-alone KMS:** NiCE Knowledge is primarily sold as an extension of the NiCE CXone CCaaS suite, and typically relies on NiCE CXone for some AI functionality. Clients with complex, multivendor environments may find reuse of knowledge outside NiCE more limited.

- **Commitment to current KMS AI tooling:** NiCE's 2025 acquisition of conversational AI platform specialist Cognigy has added a new AI offering and strategy to the NiCE CXone platform, including knowledge management functionality. NiCE's AI roadmap alignment with its Cognigy acquisition may disrupt existing Enlighten AI-based implementations, including those involving NiCE Knowledge.
- **Consistency of customer support:** In the past year, some Gartner clients have reported that it can be difficult to access NiCE support personnel who are familiar with NiCE Knowledge. This can delay deployments and create challenges with leveraging system functionality.

Salesforce

Salesforce, a public company, is a Leader in this Magic Quadrant. Salesforce Knowledge, as part of the broader Agentforce 360 platform, provides governed knowledge to ground Agentforce-enabled reasoning, and supports omnichannel customer service operations. Salesforce mainly operates in North America, Europe, Latin America, and Asia/Pacific in small, midsize, and large enterprise segments. It serves more than 14 verticals, including financial services, manufacturing, automotive, and energy. Recent innovations include Self Learning Knowledge to analyze and fix content gaps found by analyzing service interactions. The company's roadmap includes Enterprise Knowledge, which expands connector coverage across industry-vertical repositories, and Knowledge Blocks, which makes it easier to maintain knowledge with atomic authoring.

Strengths

- **Investment in innovation:** Salesforce invests significantly in platform innovations that extend knowledge management's value and enable agentic AI use cases. Partnerships with AI vendors enable customers to bring their own fine-tuned models, while the acquisition of Zoomin helps Salesforce build Enterprise Knowledge natively on Data360.
- **Geographic and partner strategy:** Salesforce maintains a strong international presence, with recent investments in Hyperforce Japan and sustained dedication to Latin America operations. This enables local partners to handle many implementations and cater to local needs.
- **Market understanding:** Through IdeaExchange, RoadmapExchange, advisory boards, and design partnerships, Salesforce collects and evaluates customer feedback from a variety of

sources. This provides a strong market understanding that translates into a clear value proposition.

Cautions

- **Sales execution and pricing:** Salesforce Knowledge is not sold as a stand-alone solution; it is purpose-built for Agentforce Service. Agentic capabilities rely on Agentforce, which requires purchasing and managing Flex Credits in a difficult-to-predict consumption model.
- **Limited advanced authoring capabilities:** Salesforce Knowledge lacks more advanced content creation capabilities. This includes atomic authoring, collaborative editing, and conditional content variations required by service organizations in compliance-focused environments.
- **Product release cycle:** Salesforce has delivered fewer product enhancements over the past 12 months than other vendors in this Magic Quadrant, reflecting the fact that enhancements must be coordinated across a broad suite of platform capabilities. Clients investing heavily in maturing their knowledge programs may find their needs outpacing new capabilities.

Shelf

Shelf, a private company, is a Leader in this Magic Quadrant. Its platform surfaces relevant content with ontology-driven knowledge engineering and deep knowledge quality assurance to model business logic, relationships, and workflows. It also can help maintain a trusted knowledge repository by detecting redundancies and quality gaps with its automatic diagnostics engine. Shelf's operations are mostly in North America, Europe, and Asia/Pacific, serving enterprise organizations mostly in insurance, healthcare, and transportation. Shelf recently upgraded its LLM-powered assistant to leverage the knowledge graph and data model. Its roadmap includes fully automated data model creation, which simplifies maintenance and increases the specificity of the models.

Strengths

- **Market understanding:** Shelf offers knowledge quality assurance through 23 prebuilt diagnostics that identify outdated content, duplicates, and compliance risks. This helps maintain a trusted knowledge layer that supports human agents and AI-driven workflows without requiring extensive manual maintenance.

- **Ontology-driven design:** Shelf's ontology-driven knowledge engineering models business entities, relationships, and operational processes in the knowledge environment. This allows AI systems to interpret requests in context and apply business rules rather than relying on standard document retrieval.
- **Operations:** Shelf supports customer adoption through a consultative customer success program featuring an outcomes-driven engagement approach and role-based training. This helps customers achieve faster time to value, independent platform expertise, and measurable returns on AI-driven service initiatives.

Cautions

- **Customer experience:** Some clients report that Shelf has experienced extended customer onboarding timelines due to shifting priorities and complex integration environments during implementation. This delays initial time to value and postpones the rollout of knowledge-driven customer service capabilities for organizations with highly fragmented technology stacks.
- **Operations:** Shelf relies entirely on Amazon Web Services for cloud hosting infrastructure, with support for alternative providers pending. This creates deployment constraints for public sector or healthcare organizations that require specific alternative cloud infrastructure providers.
- **Geographic coverage:** Shelf's geographic footprint and direct sales presence in Latin America are small, relying on channel partners. This restricts the availability of localized direct support and implementation services for organizations operating in these economies.

Talkdesk

Talkdesk, a private company, is a Niche Player in this Magic Quadrant. Talkdesk Knowledge Management is an add-on to Talkdesk CX Cloud that provides embedded, governed knowledge access and the knowledge foundation for the CXA platform. Talkdesk mostly serves midmarket and large enterprises in North America, EMEA, Asia/Pacific, and Latin America. Its customers span an array of verticals, with most in financial services, healthcare, and retail. Recent improvements include embedding knowledge into its agentic CX architecture, enhancing content retrieval in workflows, and expanding applications it can connect to and the data it can ingest. Talkdesk's roadmap includes a multimodal RAG engine

for audio/video indexing, an observability and semantic visualization platform, and autonomous knowledge generation tooling.

Strengths

- **Product and innovation strategy:** Talkdesk's product vision is anchored in an agentic RAG pipeline and an atomized knowledge architecture. This gives clients an adaptive system capable of supporting complex, multiturn AI interactions that maintain conversational context across service channels.
- **Roadmap execution and delivery:** Talkdesk aligns its incremental CS-KMS enhancements with its broader Customer Experience Automation vision through an agile, continuous release cadence. This gives clients highly predictable access to emerging features and minimized roadmap execution risk.
- **Industry-specific knowledge capabilities:** Talkdesk Knowledge Management's vertical strategy provides industry-specific, fine-tuned models that optimize the retrieval and generation phases for targeted sectors. Clients benefit from out-of-the-box regulatory alignment and answers structurally formatted for their compliance standards.

Cautions

- **Not positioned as stand-alone KMS:** Talkdesk's CS-KMS value proposition is strongest within Talkdesk CXA environments, optimized for native CX Cloud use rather than heterogeneous, multiplatform CX architectures. Clients with complex, multivendor environments may find reuse of knowledge outside Talkdesk more limited.
- **Knowledge orchestration focus:** Talkdesk relies less on deep stand-alone knowledge authoring, taxonomy design, and KM-led operating models than pure-play KMS vendors. Clients with mature or centralized KM functions may need to supplement Talkdesk with additional tools or processes.
- **Roadmap constrained by CX direction:** Talkdesk's roadmap provides limited emphasis on independent KM evolution. Clients may find future KM capability development is constrained by Talkdesk's CX automation strategy.

Upland Software

Upland Software, a public company, is a Niche Player in this Magic Quadrant. Its RightAnswers product consolidates diverse knowledge sources across the enterprise to deliver to customer

support workflows. RightAnswers is supported globally and sold mostly in North America, Northern Europe, and Australia to large, global customer service brands with complex knowledge requirements. Recent updates add AI-powered knowledge creation and curation capabilities; workflow efficiency; and content governance, reporting and analytics improvements. The company's roadmap includes agentic AI to ingest federated knowledge into RightAnswers; AI-assisted review, quality checks, and usage recommendations; and multimodal content support, including attachments, audio, and video.

Strengths

- **Large enterprise fit:** Upland emphasizes a consultative selling model and offers a broad network of deployment and support partners. This helps it provide support to large, complex, and global knowledge deployments.
- **Embeddable user interface:** RightAnswers' composable and headless architecture enables the solution to be deployed seamlessly into enterprise CRM CEC and CCaaS desktops and workflows. This enables users of the solution to access knowledge more easily in the course of their customer support activities.
- **KCS environments:** Upland provides out-of-the-box support for Knowledge-Centered Service (KCS) workflows. This includes article life cycle states, reuse tracking, feedback loops, and quality governance. These capabilities can make Upland a good fit for environments with mature KCS operational practices.

Cautions

- **Global deployment resources:** Upland has a concentrated customer presence within North America and Northern Europe. Organizations whose KMS deployment is centered outside of these areas should validate implementation and support resources in their region.
- **Large-scale focus:** RightAnswers is sold primarily into environments with many thousands of users. Midsize customer service organizations should structure their support service-level agreements to ensure they get the required strategic support.
- **Multimedia indexing:** RightAnswers does not natively support OCR or audio/video transcription. Organizations requiring a breadth of input types should assess whether it can meet their needs.

USU, a privately held company, is a Visionary in this Magic Quadrant. Its USU CSKM product enables organizations to capture, organize, and harmonize content sources in order to provide human and AI agents with trusted knowledge. USU serves customers mostly in the midsize to large enterprise segment, with the majority in Europe, followed by North America. USU serves clients in an array of verticals, with communications, media and services; government; and power and utilities as its top three industries. USU recently released its AI Agent Factory, enabling task-specific agents directly from the knowledge base. Its roadmap includes the release of AI Knowledge Quality to address content decay.

Strengths

- **User experience:** USU uses a “complexity-to-simplicity” design principle to ensure the solution requires minimal cognitive effort to use. It translates complex knowledge and processes into simple, intuitive experiences for frontline workers, which results in high user adoption rates.
- **Customer success program:** USU’s value-driven engagement framework pairs organizations with a dedicated customer success manager for long-term advice. It offers peer-to-peer learning in its User Club, 1:1 peer matching, and annual customer events. Targeted guidance and community insights continuously align customer knowledge management maturity with evolving business objectives.
- **Continuous delivery model:** USU’s continuous delivery model compresses the time to market for new capabilities. Organizations benefit from frequent, incremental enhancements alongside enterprise-grade stability improvements.

Cautions

- **Vertical strategy:** USU’s roadmap is not structured around vertical regulatory compliance or industry-specific regulatory frameworks. Organizations in highly regulated sectors will need to address these requirements through configuration and custom integrations rather than using prepackaged features.
- **Market presence:** USU has limited market presence outside Europe. Prospective clients in the Americas should carefully assess the vendor’s ability to provide local support and references. Additional diligence may be needed to ensure the solution meets U.S. regulatory requirements.
- **AI features:** Some customers report issues with USU’s AI agent accuracy and reliability, with incorrect answers returned in specific interactions. This functional gap limits broader

deployment and degrades the performance of AI-powered service initiatives.

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.

Inclusion and Exclusion Criteria

To qualify for inclusion, each vendor had to satisfy the following:

Core CS-KMS capability: The vendor must offer generally available software that provides out-of-the-box support for all the mandatory capabilities listed in Gartner's definition of customer service knowledge management systems. The vendor does not develop code for a specific customer. The CS-KMS offer must be purpose-built for customer service knowledge management use, either:

- As a stand-alone product, or
- As a separately priced add-on product of the vendor's own enterprise customer service platform (such as a CRM CEC or a CCaaS).

Stability and longevity: The vendor must have been present in the open market, actively participating in the CS-KMS market for at least five years, demonstrable through a generally available product(s) and active marketing to enterprises, dating back to 1 January 2021.

Current: The vendor's product being evaluated must have been generally available for sale as of 1 January 2025, without restrictions or special approvals such as prerelease or beta programs. The vendor must have delivered at least two upgrades containing new functionality in calendar year 2025.

Enterprise grade: The product must have at least 250 customers (logos), with 150,000 total customer service and/or contact center users running in production, and at least 50 customer enterprises in production with more than 500 users each, as of 1 January 2026. (Vendors were required to list companies and user counts for implementations running in production that

meet these criteria in response to the vendor survey. This list of clients will remain confidential).

Tenured or growing: The vendor must have:

- Generated at least \$15 million in software license revenue from the CS-KMS product, or
- Closed new deals for at least 20,000 new customer service users between 1 January 2025 and 31 December 2025. (Vendors were required to list the clients, transaction dates, additional user counts, and revenue for transactions meeting these criteria in response to the vendor survey. This list of transactions will remain confidential).

Market and geographic presence: The CS-KMS product must serve customers in at least three of the following industry verticals: banking and investment services; communications, media and services; education; government; healthcare; insurance; manufacturing and natural resources; oil and gas; power and utilities; retail; transportation; and wholesale trade. To qualify as serving customers in an industry, the product must have a minimum of 5% of paying production customers in that industry.

The vendor must have market presence in at least two of the following regions (regional market presence is defined as a minimum of 10% of the revenue of the verified production customer base, as well as the existence of a dedicated sales office or distribution partnership in a specific region):

- North America (Canada, Mexico, and the U.S.)
- Central and South America
- Europe (including Western Europe and Eastern Europe)
- Middle East and Africa (including North Africa)
- Asia/Pacific region (including Japan)

Magic Quadrant and Critical Capabilities Exclusion Criteria

Vendors were excluded if they focused on:

- Content search, discovery, summarization, and knowledge aggregation for customer service users
- A single vertical industry

- General-purpose enterprise knowledge management and search
- Knowledge management for ITSM, employee service, or shared service help desk use cases

Honorable Mentions

The providers that are most relevant to our clients were selected for evaluation in this Magic Quadrant. However, the decision not to evaluate a provider does not mean that the provider lacks viability. The following are noteworthy providers not included in the formal analysis.

These providers could be appropriate for clients, contingent on their requirements:

Bloomfire offers its customer service knowledge management platform, Bloomfire. It enables support teams to centralize and access trusted knowledge quickly, improving resolution speed and consistency. It stands out with AI-powered search, rich media indexing, and strong analytics that drive continuous content optimization.

Microsoft offers customer service knowledge management through Dynamics 365 Customer Service. It helps support teams create, manage, and surface knowledge articles to resolve cases faster and improve consistency. It is differentiated by deep CRM capabilities, embedded AI Copilot, and seamless ties to the Microsoft ecosystem.

ServiceNow delivers customer service knowledge management through its Knowledge Management capabilities on the ServiceNow AI Platform, surfaced within ServiceNow Customer Service Management (CSM). It enables support teams to create, manage, and surface trusted content to speed resolution and improve consistency. It is differentiated by AI-powered knowledge creation and optimization, workflow automation, a unified data model, and tight integration across service processes.

Zendesk offers its customer service knowledge management system as part of the Zendesk Suite. Zendesk Knowledge supports creating, managing, surfacing, and improving knowledge across service workflows, human or AI. It is differentiated by seamless ticketing integration, strong UX, and AI-driven content recommendations.

Evaluation Criteria

Ability to Execute

The evaluation criteria and weights describe the specific characteristics and their relative importance that contribute to Gartner's view of the market. These criteria are used to comparatively evaluate CS-KMS platform providers in this research.

Product or Service: The capabilities, features and overall quality of the core goods and services that compete in and/or serve the defined market. Representative characteristics we evaluate under this criterion are the execution depth and breadth of the capabilities noted in the "Features" sections of the Market Definition; evidence of a consistent product release, update, and delivery cadence indicating the overall health of a vendor's product delivery; and evidence of a meaningful and robust product roadmap that addresses market needs.

Overall Viability: The organization's overall financial health, as well as the financial and practical success of the relevant business unit. This includes the likelihood that the organization can continue to offer and invest in the product, as well as the product's position in the organization's portfolio. Representative characteristics we evaluate under this criterion include the health of the line of business serving the CS-KMS market (as evidenced by its revenue, profitability, and growth), and the organization's productivity and R&D investment.

Sales Execution/Pricing: The organization's capabilities in all presales activities and the structures that support these activities. This includes deal management, pricing and negotiation, presales support and the overall effectiveness of the sales channel. Representative characteristics we evaluate under this criterion include the number or percentage of new customers acquired in the past year, alongside cost and pricing competitiveness, including pricing and contract flexibility in licensing terms relative to comparable competitors.

Market Responsiveness and Track Record: The ability to respond, change direction, be flexible, and achieve competitive success as opportunities develop, competitors act, customer needs evolve, and market dynamics change. This includes the provider's history and success of responsiveness to changing market demands. Representative characteristics we evaluate under this criterion include a vendor's current market position and standing, as well as the relevant differentiation of their offering.

Marketing Execution: The ability to deliver clear, high-quality, creative, and effective messaging via publicity, promotional activity, thought leadership, social media, referrals, and sales activities. This includes the organization's ability to influence the market, promote the brand, increase awareness of products and establish a positive reputation among customers. Representative characteristics we evaluate under this criterion center on the vendor's Ability

to Execute tactical and strategic marketing programs and campaigns that engage buyers, customers, system integrators, and influencers, as well as the vendor’s ability to create and extend its brand as a CS-KMS technology provider and one that shapes the direction of the space.

Customer Experience: The degree to which a vendor’s products, services, and programs enable customers to achieve their desired results. This includes the quality of supplier/buyer interactions, technical support or account support, as well as ancillary tools, customer support programs, availability of user groups, and service-level agreements. Representative characteristics we evaluate under this criterion include the availability and viability of customer service and support capabilities, and the accessibility of qualified external resources, including partnerships with system integrators, consulting organizations, and technology vendors.

Operations: The ability of the organization to meet its goals and commitments. This includes the quality of its organizational structure, skills, experiences, programs, and systems that enable the organization to operate effectively and efficiently. Representative characteristics we evaluate under this criterion involve the demonstrated ability to help customers achieve positive business value and drive sustained user adoption of the provider’s CS-KMS solution. They also include the average time required and process for customers to onboard and implement the vendor’s solution.

Ability to Execute Evaluation Criteria	
Evaluation Criteria	Weighting
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	High
Market Responsiveness/Record	High
Marketing Execution	Low

<i>Evaluation Criteria</i>	<i>Weighting</i>
Customer Experience	High
Operations	Medium

Source: Gartner (July 2026)

Completeness of Vision

Market Understanding: The ability to understand customer needs and translate that understanding into products and services. Vendors with a clear vision of the market listen to and understand customer demands, and can shape or enhance market changes with their vision. Representative characteristics we evaluate under this criterion include the vendor’s unique value proposition to the market, and a comprehensive vision of external market force such as enterprise buying trends, technology disruption, competitive risks, the impact of AI, the changing macroeconomic and regulatory landscape and alignment with objectives and use cases of customers, including in diverse industries and geographic regions.

Marketing Strategy: The ability to clearly communicate differentiated messaging, both internally and externally, through social media, advertising, customer programs, and positioning statements. Representative characteristics we evaluate under this criterion include how effectively the vendor communicates its differentiated or unique functionality or value proposition, and how effective the vendor is at reaching the buyer personas and buying center(s) of organizations purchasing CS-KMS solutions.

Sales Strategy: The ability to create a sound strategy for selling that uses the appropriate networks, including direct and indirect sales, marketing, service, and communication. This includes partnerships that extend the scope and depth of a provider’s market reach, expertise, technologies, services, and its customer base. Representative characteristics we evaluate under this criterion focus on the vendor’s direct sales strategy and team structure (such as account executives, sales development representatives, and sales/solution engineers) for engaging customer segments, as well as the vendor’s indirect channel strategy and the role of system integrators, agencies, and other partners in the sales process.

Offering (Product) Strategy: The ability to approach product development and delivery in a way that meets current and future requirements, with an emphasis on market differentiation, functionality, methodology, and features. Representative characteristics we evaluate under this criterion include the vendor's product vision relative to the capabilities noted in the "Features" sections of the Market Definition; a consistent product release or update cadence indicating the overall health of the vendor's CS-KMS roadmap; and customer communities as an important listening post to inform and influence product direction.

Business Model: The design, logic, and execution of the organization's business proposition. (Note: This criterion is not rated. Related evaluation characteristics were considered in the Overall Viability and Operations criteria).

Vertical/Industry Strategy: The ability to strategically direct resources (sales, product, development), skills, and products to meet the specific needs of verticals and market segments. Representative characteristics we evaluate under this criterion involve a strategy that broadly and deeply extends the CS-KMS value proposition beyond one or two specific industries or verticals where the vendor has core domain competency; and the vendor's ability to direct resources, skills, and investment to meet the specific needs of new market segments, users, or vertical industry groups.

Innovation: Marshaling of resources, expertise, or capital for competitive advantage, investment, consolidation, or defense against acquisition. Representative characteristics we evaluate under this criterion encompass investments in R&D capacity to ensure a pipeline of intellectual property aligned with the vendor's vision for the future of CS-KMS; sustained collaborations and partnerships with innovators, researchers, and academics to enrich and augment the vendor's product vision; product development in new or adjacent areas that elevates the value proposition of CS-KMS; and mergers and acquisitions that support all of the above.

Geographic Strategy: The ability to direct resources, skills, and offerings to meet the specific needs of regions outside the providers' home region, either directly or through partners, channels, and subsidiaries. Representative characteristics we evaluate under this criterion include the number of employees allocated to different regions where the vendor has a sales, marketing, and/or support presence; the tailoring of the vendor's go-to-market or product strategy for regional differences; the depth and scope of partners available in those regions; and languages available for the platform solution.

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

Source: Gartner (July 2026)

Quadrant Descriptions

Leaders

Leaders are in the strongest position to influence the CS-KMS market’s direction. They demonstrate a market-defining vision of how knowledge management must evolve into an active, AI-driven reasoning layer for the enterprise. Leaders have the Ability to Execute against that vision through highly scalable platforms, robust AI governance and compliance frameworks, and comprehensive integration capabilities. They excel in their combination of market understanding, continuous innovation, platform features, and overall viability to support complex, enterprisewide use cases.

Challengers

Challengers have established a solid presence, credibility, and viability, and have demonstrated the ability to meet customers' operational expectations. They offer reliable technology capabilities and strong execution, but their product vision may not fully align with the most advanced market trends, such as agentic AI orchestration or deep semantic structuring. They may lack the broader market momentum, geographic coverage, or comprehensive feature sets of Leaders.

Visionaries

Visionaries deliver highly innovative capabilities and sophisticated CS-KMS experiences, such as advanced AI agent orchestration, autonomous knowledge generation, and deep knowledge-to-learning workflows. They embody the trends that are shaping the future of the CS-KMS market and possess strong innovation pipelines. However, they may have limitations in their Ability to Execute, which can manifest as lower brand awareness, smaller geographic reach, or evolving operational maturity compared with their counterparts.

Niche Players

Niche Players offer selected CS-KMS capabilities that are compelling for specific use cases, targeted verticals, or tightly integrated into CX, CRM or CCaaS platforms. While they provide solid value to their core customer base, their solutions may have limitations in areas such as comprehensive breadth of features, broad brand awareness, or maturity in rapidly evolving capability areas. They may also face challenges in supporting the most complex, enterprisewide knowledge orchestration requirements across diverse global geographies.

Context

The customer service knowledge management system (CS-KMS) market is undergoing a structural shift from passive content repositories to active, AI-driven reasoning layers powered by machine-readable knowledge. Organizations increasingly recognize that the success of generative AI and agentic workflows depends directly on the quality, structure, machine-readability, and governance of the underlying knowledge. Vendors are responding by repositioning their knowledge management platforms as the foundational intelligence layer for enterprise AI, focusing on automated gap detection, continuous knowledge content

health monitoring, and knowledge-in-the-flow-of-work delivery that pushes contextually relevant answers directly into the customer service agent's flow of work.

As AI agents become capable of more complex, multiturn interactions, enterprise buying criteria have shifted heavily toward trust and security. Capabilities such as isolated inference, cryptographically enforced zero-training guarantees, strict role-based access controls, and verifiable audit trails are now baseline requirements, particularly in regulated industries. When selecting a CS-KMS provider, buyers should prioritize comprehensive trust architectures that feature real-time PII redaction, source-system permission mirroring, and strict regulatory compliance (such as the EU AI Act and ISO/IEC 42001) to protect proprietary information and mitigate data sovereignty risks.

Vendors are also expanding their architectures to support multimodal content (such as audio, video, and complex diagrams) and bidirectional federated search, allowing organizations to orchestrate knowledge across disparate enterprise silos without requiring extensive data migration.

Additionally, clients must avoid creating new data silos by choosing platforms with robust APIs and federated search capabilities that embed knowledge delivery seamlessly into existing CRM and CCaaS workflows.

Market Overview

Over the past year, the proliferation of generative AI and the rapid emergence of agentic AI have completely redefined enterprise expectations regarding how enterprise information moves. Expectations of always-available, relevant information have transformed the scope of knowledge management systems to enable dynamic, fluid knowledge (see [Innovation Insight: Fluid Knowledge](#)).

The key dynamics and major changes currently driving this market include:

Critical Importance of KM to AI, and the Rise of Agentic AI

A major market change from previous years is the transition from simple question answering (generative AI) to systems that reason, make decisions, and execute multistep workflows autonomously (agentic AI). Early AI deployments revealed that disconnected, unstructured, or outdated knowledge leads directly to AI hallucinations, inaccurate responses, and failed projects. Consequently, buyers now recognize that AI-powered solutions are only as reliable

as the knowledge grounding them and, in particular, whether the knowledge employees use is accessible as reusable machine-readable knowledge assets to AI. The market is increasingly adapting advanced techniques such as knowledge graphs, ontology-driven knowledge modeling and structured reasoning, where business context and logic are explicitly mapped so that AI agents can execute tasks more reliably at scale utilizing fluid knowledge.

Governance, Compliance, and Trust as Nonnegotiable Baselines

As AI encroaches into a greater share of Tier-1 service interactions, the tolerance for knowledge gaps and inaccuracies has dropped to zero. Knowledge governance is no longer just a feature; it is a primary buying criterion and risk management imperative. Buyers increasingly demand absolute data sovereignty, isolated AI inference, real-time PII masking, and cryptographically enforced “zero-training” guarantees to ensure their proprietary data is not used to train public foundational models. In heavily regulated sectors like healthcare and finance, strict audit trails and human-in-the-loop validation workflows are mandatory to comply with emerging frameworks such as the EU AI Act and local data privacy laws.

Autonomous Knowledge Maintenance and Life Cycle Automation

Organizations are generating unstructured content faster than human teams can manually curate it. To solve this, the market is moving away from manual authoring toward continuous, AI-driven knowledge optimization. Leading platforms are utilizing mechanisms that autonomously mine historical tickets, live call transcripts, and chat logs to identify knowledge gaps and autodraft new articles. AI-driven health diagnostics continuously monitor the corpus to flag duplicated, contradictory, or outdated content for review, shifting knowledge management from a reactive burden to a proactive, self-optimizing system.

Knowledge in the Flow of Work

The operational paradigm is shifting to eliminate manual searching entirely during real-time customer interactions. CS-KMS platforms are leveraging real-time speech-to-text, intent inference, and CRM metadata to proactively push synthesized answers and prescriptive next best actions directly into the agent’s workspace exactly when needed. This “no-search” capability dramatically reduces customer and agent effort, shortens average handle time, and accelerates new-hire onboarding by providing contextual guidance natively within enterprise customer service interfaces such as CCaaS and CRM CEC.

Deep Indexing and Multimodal Content Retrieval

The definition of enterprise knowledge content has expanded beyond text documents. Modern CS-KMS platforms are increasingly required to deeply index and reason over

multimodal content, utilizing optical character recognition (OCR) and multimodal vector embeddings to extract insights from complex diagrams, images, audio transcripts, and video files. Simultaneously, organizations are refusing to undertake massive “rip-and-replace” data migrations. Instead, the market is adopting headless and federated architectures — utilizing robust APIs and Model Context Protocol (MCP) servers — to synchronize and surface knowledge dynamically from external silos while maintaining centralized access controls.

Acronym Key and Glossary Terms

CCaaS	contact center as a service
CEC	customer engagement center
CRM	customer relationship management
KMS	knowledge management system
MCP	Model Context Protocol
OCR	optical character recognition
PII	personally identifiable information

⊕ Evaluation Criteria Definitions

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