

# Market Guide for Adaptive Project Management and Reporting

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Initiatives: PMO Evolution for Digital

The project and portfolio management market supports strategic portfolio management and adaptive project management and reporting. PMO leaders should use this Market Guide when choosing tools specifically for adaptive project and work management and reporting.

## Overview

### Key Findings

- Enterprise portfolio management offices (EPMOs) are embracing the proliferation of multiple project and work management tools across the enterprise, and integrating these tools, as needed, with a separate, strategic portfolio management technology for portfolio monitoring and decision making.
- Domain-specific PMOs are rejecting traditional project management methods and tools, and adopting adaptive PM and reporting tools that support continuous delivery.
- The PPM market is responding to two distinct technology needs for customers: strategic portfolio management and adaptive PM and reporting. More PPM vendors are offering multiple PPM technologies to support these two very different use cases.

### Recommendations

IT and PMO leaders evolving PMO or PM functions for digital business must:

- Evaluate the most suitable PPM technologies by understanding the differences between adaptive PM and reporting technologies and strategic portfolio management technologies.

- Ensure that proper due diligence is applied in the technology selection process by using this Market Guide to explore many of the technology solutions offered by different types of adaptive PM and reporting providers.
- Avoid unnecessary PPM tool proliferation in the enterprise by identifying and comparing adaptive PM and reporting solutions already being used with solutions of interest listed in this Market Guide.

## Strategic Planning Assumption

By 2024, 50% of all program and portfolio management (PPM) leaders will integrate complementary technologies to enable portfolio decision making and adaptive work management for digital business evolution.

## Market Definition

Adaptive project management (PM) and reporting is one of many distinct submarkets making up the overall PPM market. This PPM submarket specifically emphasizes the automation of detailed project and work execution activities to support the technology needs of project managers and individual contributors. Reporting services provide visual representations of the status and progress of any projects or other work captured and tracked in the adaptive PM and reporting system, using real-time portfolio views and supporting dashboards.

## Market Description

Adaptive PM and reporting technologies enable cohesive process automation for project and work (demand) intake, basic prioritization, detailed sourcing and planning, detailed progress reporting, and full project inventory (portfolio) reporting, using a central technology or platform (see Figure 1). To achieve basic portfolio management in these tools, end users must also adopt the tool's detailed PM, named resource management and time collection features.

Figure 1: Adaptive PM and Reporting Process Flow

**Adaptive Project Management and Reporting Process Flow**

Source: Gartner (2020)

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Project and work environments in today's enterprises have differing requirements for execution tools. Adaptive PM and reporting technology is highly flexible. It enables the definition of various types of project and work packages that support project managers responsible for digital business, as well as business users responsible for planning organized work efforts in different parts of the enterprise. Managers in these environments are also diversifying their use of traditional and alternative work and project execution methods to support continuous delivery.

The work and project teams in these environments need to:

- Reduce overall project and work durations
- Promote continuous customer responsiveness and satisfaction
- Adapt to changing customer needs
- Base any execution approaches on the time-to-value perceptions of their customers

The varied use cases for adaptive PM and reporting technologies appear in many different places in an enterprise, including internal IT, product development, marketing and professional services delivery. This allows an array of different technology providers inside and outside of the PPM market to offer support for adaptive PM and reporting for their customers.

Customers of adaptive PM and reporting solutions are mainly interested in enhancing the data sharing, collaboration and communication between project managers and team members in a project or work environment. The goal is to provide the right tools for managing specific types of projects and work, while also driving high levels of productivity from contributors and team members assigned to projects and work.

Adaptive PM and reporting providers offer technology solutions to support the entire project and work management life cycle depicted in Figure 1 using one central technology or platform.

These solutions typically include a number of the following features:

- Detailed project and work demand intake
- Basic demand prioritization and selection
- Resource capacity planning and modeling
- Detailed project and work planning and management
- Resource assignment and allocation
- Task management and maintaining Kanban storyboards
- Time and status reporting
- Project and work risk management
- Project and work change management
- Social networking and collaboration
- Decision support – business intelligence (BI) and analytics
- Integration with third-party systems and data sources
- Artificial intelligence (AI) and robotic process automation (RPA) enablement
- Mobile access and support
- Advanced integration of agile tools with an adaptive PM and reporting technology is also a priority requirement

## Market Direction

On the demand side, adaptive PM and reporting buyers are:

- Realizing that their PM and reporting tools and technologies were configured and deployed many years ago for different purposes and do not fit current needs.
- Determining that their existing PM tools support only traditional PM and are not flexible enough to be reconfigured to support adaptive, iterative and agile approaches for faster, continuous delivery.
- Uncovering PM tools deployed on-premises that are no longer supported by users or the software vendor that provided the software and that need to be replaced.
- Seeking more adaptive PM and reporting technologies deployed via software as a service (SaaS).
- Interested in finding adaptive PM and reporting solutions that are cost-effective, intuitive, and easy to use, configure and deploy.
- Experiencing end-user rejection of existing, older PM tools and technologies because they are too cumbersome and not user-friendly.
- Recognizing that the cost of some of the existing PM tools they are using can no longer be justified.
- Attempting to consolidate multiple instances of different PM tools used in different parts of the enterprise.
- Concluding that the disconnected email, spreadsheet, word processing and time-reporting technologies to support PM processes are unsustainable or not scalable, and are looking for adaptive, cloud-based, integrated solutions as replacements.
- Interested in reducing their use of multiple PM tools by adopting a single-source value proposition offered by technology providers not directly competing in the overall PPM market.

On the supply side, adaptive PM and reporting providers are:

- Continuing to evolve their technology offerings to support the needs of customers adopting multiple approaches to adaptive PM and reporting.

- Engaging in mergers and acquisitions to supplement their existing products' capabilities or to expand their overall inventory of different project and work management tools to support different subsegments of the overall PPM market.
- Adding flexible ways to define different types of project and work efforts, including formal methods (waterfall), hybrid methods (iterative) and continuous delivery methods (agile).
- Moving beyond simple API approaches to integration with agile tools to support automated time collection.
- Partnering with web integration platforms to offer integration as a service for a fixed annual fee, rather than relying on third-party partners to support the integration needs of their customers.
- Embedding more collaboration, social networking and enhanced overall user experience in their technologies to provide a higher level of user acceptance and adoption and less reliance on traditional email and other mechanisms for communicating across multiple individuals and teams.
- Accepting additional rounds of private equity and venture capital funding needed for additional technology development, diversification of services and support, and expansion of the sales force into multiple regions for better worldwide market penetration.
- Adapting their pricing models to drive more organic revenue growth and satisfy the expectations of their investors.
- Spending more research and development funds on extending their overall support for mobile accessibility, and marketing their mobile applications on popular application marketplaces, such as Google Play and the Apple Store.
- Making initial investments in AI-enabled capabilities, including bots and machine learning (ML).

## Market Analysis

The need for adaptive PM and reporting technology can arise anywhere in today's enterprises and manifest itself in multiple forms, with differing technology requirements for each instance or defined need.

Significant use cases for adaptive PM and reporting technology solutions include the following:

- IT project and work management
- Agile development and work management
- Marketing project and work management
- Product-development-based project and work management
- Outsourced IT services or system integration project and work management
- Client-facing professional services project and work management

Pure-play PPM providers, as well as enterprise software providers competing primarily in markets other than PPM, offer adaptive PM and reporting technologies for their customers.

These providers include:

- Existing pure-play PPM providers
- Collaborative work management (CWM) providers
- Enterprise agile planning (EAP) providers
- Technology platform providers from other markets

## Existing Pure-Play PPM Providers

Pure-play PPM providers are no strangers to supporting an adaptive PM and reporting life cycle for their customers. The need for foundational PPM software capabilities, including integrated time reporting, resource management and project tracking, triggered the emergence of the expansive PPM market in the mid-to-late 1990s. These same capabilities are now commodities of the PPM market.

Many pure-play PPM providers have since evolved their solutions to support the growing list of use cases for adaptive PM and reporting. Some pure-play PPM providers continue to support adaptive PM and reporting by evolving one PPM technology or platform. Other PPM providers are regularly engaging in mergers and acquisitions to diversify their PPM product inventories and compete in many PPM market subsegments, including adaptive PM and reporting.

## CWM Providers

CWM providers offer task-driven workspaces supporting business users in work planning and execution. They combine task, project, workflow, and automation capabilities with conversations, content publishing, reporting, analytics and dashboards. CWM technology is defined by its purpose (work planning and execution), by target users (nontechnical business users, rather than professional project managers or business analysts), and by broad and flexible functionality.

CWM technology supports work that can be planned using a demand intake process. At the same time, it supports flexible, self-organizing, and open-ended collaboration and replanning, as needed.

For adaptive PM and reporting, CWM technology allows users to define and plan different types of projects and work and manage them to completion. CWM providers usually leverage a single, cloud-based platform to deliver a high level of configurability and usability. This flexibility enables customers to use a CWM technology in multiple places in an enterprise where needed.

## EAP Providers

EAP providers help organizations make use of agile practices at scale to achieve enterprise-class agile development. This is achieved by supporting practices that are business-outcome-driven, customer-centric, collaborative and cooperative, in conjunction with continual stakeholder feedback.

EAP tools represent an evolution from project-centric agile tools and traditional application development life cycle management (ADLM) tools. Most EAP technologies play into an overall ADLM product set, acting as hubs for the definition and management of work item tracking.

There is a relationship between EAP tools and PPM tools. Traditional PPM tools provide high-level planning and resource management for digital business, but may lack enterprise-class agile development support. EAP tools may not support strategic portfolio management or adaptive PM beyond adherence to agile frameworks.

## Technology Platform Providers

Technology platform providers not directly competing in the overall PPM market include some support for adaptive PM and reporting features and capabilities for their customers. Their approach is to offer optional modules, suites or other extensions that can be added or bolted on to an existing investment in the provider's flagship technology platform. For customers to use these options, they must have already invested in the provider's core platform or technology, which is often built for purposes other than PPM use cases. Customers often need to upgrade the entire platform to get to the latest features and functions the provider adds to these modules, suites or extensions.

Technology platform providers supporting adaptive PM and reporting include enterprise resource planning (ERP), IT service management (ITSM) and customer relationship management (CRM) providers. For ERP providers, support for adaptive PM and reporting evolved from a need to tie capital and operational expenditures resulting from projects back to the financial management system. For ITSM providers, adaptive PM and reporting originated from infrastructure and operations (I&O) groups that need to define, track and report on I&O projects. For CRM providers, customer-facing engagements and billable work, including projects, drove the need for an embedded, yet basic, set of PM and reporting capabilities tied to customer-facing engagements and services delivery.

## Representative Vendors

*The vendors listed in this Market Guide do not imply an exhaustive list. This section is intended to provide more understanding of the market and its offerings.*

## Market Introduction

The vendors named in this guide were selected to represent the types of solutions discussed in the Market Analysis section (see Table 1, Table 2, Table 3 and Table 4). For each category, we list the vendors in which Gartner has received the most client interest (searches on gartner.com and inquiry).

**Table 1: Representative Providers in Adaptive Project Management and Reporting – Existing Pure-Play PPM**

(Enlarged table in Appendix)

<b>Vendor</b> ↓	<b>Product</b> ↓
Broadcom	Clarity (when configured for execution)
Changepoint	Daptiv
KeyedIn	KeyedIn Projects
Microsoft	Microsoft Project
ONEPOINT Projects	Project Management Office
Planisware	Planisware Enterprise PPM (when configured for execution) Planisware Orchestra
Planview	Planview Enterprise One (when configured for execution) Planview PPM Pro Planview-Changepoint Project Portfolio Management (acquired by Planview in 2021)
Project Objects	Project Management (when configured for execution)
Sciforma	Sciforma
Upland	Eclipse PPM

Source: Gartner (July 2021)

**Table 2: Representative Providers in Adaptive Project Management and Reporting – Collaborative Work Management**

(Enlarged table in Appendix)

<b>Vendor</b> ↓	<b>Product</b> ↓
Adobe-Workfront	Adobe Workfront
Asana	Asana
Atlassian	Confluence Trello
Cerri	Cerri
Mavenlink	Mavenlink
monday.com	monday.com
One2Team	All-In-One Enterprise Work Management Platform
Planview	Projectplace
Planview-Clarizen	Planview Clarizen
ProjectManager	ProjectManager
Project Objects (Uppwise division)	Needful
Smartsheet	Smartsheet
WorkOtter	WorkOtter
Wrike	Wrike

Source: Gartner (July 2021)

**Table 3: Representative Providers in Adaptive Project Management and Reporting – EAP**

<b>Vendor</b> ↓	<b>Product</b> ↓
Atlassian	Jira Software
Broadcom	Rally Software
Planview	LeanKit

Source: Gartner (July 2021)

**Table 4: Representative Providers in Adaptive Project Management and Reporting – Technology Platform**

(Enlarged table in Appendix)

<b>Vendor</b> ↓	<b>Product</b> ↓
Agile CRM	Project Management Software
Copper	Project Management CRM for Productive Teams
Infor	Professional Services Automation Suite
Ivanti-Cherwell	Project & Portfolio Management
Microsoft	Microsoft Project and Contracts for Dynamics 365 Finance
Oracle	Oracle Project Management
Project Open Business Solutions	PM – Project Management
SAP	SAP Portfolio and Project Management
ServiceNow	ServiceNow IT Business Management
TeamDynamix	Project Portfolio Management
TeamWave	Project Management
Zoho	Zoho Projects

Source: Gartner (July 2021)

## Market Recommendations

PMO leaders responsible for organizing and automating adaptive PM and reporting should do the following:

- Define their specific requirements for an adaptive PM and reporting technology, and include the opinions and feedback of the end users that will be expected to adopt and use the proposed technology solution on a daily basis.
- Identify any adaptive PM and reporting tools that may already be in use in different parts of their enterprises, touching base with any business units or departments using a product listed in this Market Guide.
- Avoid redundant and unnecessary proliferation of adaptive project and work management tools by evaluating any tools already being used in their enterprises against their specific tool requirements.

- Include any identified adaptive PM and reporting tools already being used in their enterprises that may fit their specific requirements as part of their shortlists or longlists of potential technology solutions.
- Expand their lists of potential candidates for adaptive PM and reporting to include additional providers and products included in this Market Guide that fit their specific tool requirements.
- Consider and account for the differences between selecting an independent, pure-play, adaptive PM and reporting technology versus extending (through the addition of modules or suites) existing investment in a technology platform to support their specific requirements (e.g., pure-play versus single-source comparisons).

## Note 1. Representative Vendor Selection

The PPM providers in this Market Guide were selected from the list of PPM providers included in Gartner's continuous coverage of the overall PPM market. Some of these vendors offer execution-level configurations of their product for adaptive PM and reporting. Others offer primary collaborative work management technologies suitable for adaptive PM and reporting and CWM use cases. PPM providers have accumulated multiple PPM and CWM products, including tools supporting adaptive PM and reporting use cases.

The CWM providers in this Market Guide were selected from the list of providers included in Gartner's Market Guide for Collaborative Work Management. These selected providers support adaptive PM and reporting, and this support has been validated through discussions occurring in Gartner's inquiry services and customer reference interviews.

The EAP providers in this Market Guide were selected from the list of providers included in Gartner's Magic Quadrant for Enterprise Agile Planning Tools. The selected vendors are often also mentioned by clients seeking adaptive PM and reporting tools in discussions occurring in Gartner's inquiry services.

The technology platform providers in this Market Guide were selected because they demonstrate some level of contextual, adaptive PM and reporting support for customers. Customers using these platforms can extend the use of such platforms (which are focused on process automation outside of PPM use cases) to support adaptive PM and reporting. This can be done by adopting modules or additional sets of capabilities offered by the technology platform provider.

## Document Revision History

Market Guide for Adaptive Project Management and Reporting - 22 April 2020

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## Recommended by the Authors

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

The PPM Market Now Supports Strategic Portfolio Management and Adaptive Project Management

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What to Consider When Selecting PPM Tools

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Project Open Business Solutions	PM – Project Management
SAP	SAP Portfolio and Project Management
ServiceNow	ServiceNow IT Business Management
TeamDynamix	Project Portfolio Management
TeamWave	Project Management
Zoho	Zoho Projects

Source: Gartner (July 2021)

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