

# IT Observability Platforms Buyers Guide

Software Provider and Product Assessment

EXECUTIVE  
SUMMARY

**\*ISG** Research



## Key Takeaways

IT observability platforms have evolved into critical operational intelligence systems that help enterprises understand and manage increasingly distributed and dynamic technology environments. Organizations rely on observability to correlate telemetry data across infrastructure, applications and services while improving operational resilience and service performance. Artificial intelligence (AI), automation and unified analytics capabilities are accelerating the shift from reactive monitoring toward predictive and context-driven operational management.

### Software Provider Summary

The ISG Buyers Guide™ for IT Observability Platforms evaluates 24 software providers offering products supporting telemetry analysis, operational visibility and AI-driven observability workflows. The research ranked the top three overall leaders as ServiceNow, Dynatrace and BMC. Providers were classified using weighted performance in Product Experience and Customer Experience for ISG quadrant placement. BMC, Cisco, Datadog, Dynatrace, Elastic, Google Cloud, Grafana Labs, Microsoft, Oracle and ServiceNow were rated as Exemplary, with Coralogix, Fabrix.ai and ManageEngine rated as Innovative. Broadcom, Chronosphere and IBM were rated as Assurance; and Honeycomb, LogicMonitor, New Relic, OpsRamp, ScienceLogic, SolarWinds, Sumo Logic and Zenoss were rated as Merit.

### Product Experience Insights

Product Experience, representing 80% of the evaluation, focuses on Capability (35%) and Platform (45%), which includes adaptability, manageability, reliability and usability. ServiceNow, Dynatrace and BMC achieved the highest performance as Leaders in this category, supported by event correlation and real-time monitoring capabilities combined with predictive analytics and intelligent automation. Leaders demonstrated enterprise-grade platform capabilities across varied infrastructure, application and operational contexts.

### Customer Experience Value

Customer Experience, representing 20% of the evaluation, focuses on validation and TCO/ROI. Dynatrace, ServiceNow and Microsoft were the Leaders in this category, showing strong customer commitment and clear dedication to customer needs. Providers with lower performance often lacked sufficient information to demonstrate customer success, articulate commitment to customer experience or communicate measurable value through TCO/ROI.

### Strategic Recommendations

Enterprises should evaluate observability platforms based on their ability to provide unified visibility, contextual analytics and scalable operational intelligence across hybrid and multicloud environments. Assessment should prioritize telemetry integration, analytics maturity, automation support and interoperability with existing IT operations (ITOps) and DevOps) workflows. Organizations should also evaluate AI-enabled anomaly detection, root cause analysis and operational guidance capabilities that improve response speed and support long-term operational resilience.



# The Findings

The software providers and products evaluated in this research offer product and customer experiences, but not every feature is equally valuable to every enterprise or is needed to support the relevant business processes and use cases. Moreover, having too many product capabilities may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a more comprehensive set of capabilities is important and meets your enterprise's requirements.

An effective customer relationship with a software provider is vital to the success of any investment. The overall customer experience and the full lifecycle of engagement play a key role in ensuring satisfaction and long-term success. Providers with dedicated customer leadership, such as chief customer officers, tend to invest more deeply in these relationships and prioritize customer outcomes in line with TCO and ROI expectations. It is equally important that this commitment to customer success is evident throughout the provider's website, the buying process and the customer journey.

## Overall Scoring of Software Providers Across Categories

The research finds ServiceNow atop the list, followed by Dynatrace and BMC. Providers that place in the top three of a category earn the designation of Leader. ServiceNow and Dynatrace have done so in four categories; BMC in three; Microsoft in two; and Cisco, Coralogix, Datadog in one category.

### IT Observability Platforms

#### Overall

Providers	Grade	Performance
ServiceNow	A-	<b>Leader</b> 82.2%
Dynatrace	B++	<b>Leader</b> 80.2%
BMC	B++	<b>Leader</b> 79.0%
Microsoft	B++	78.9%
Datadog	B++	77.6%
Cisco	B++	77.5%
Grafana Labs	B++	76.7%
Oracle	B+	74.6%
Elastic	B+	74.1%
Google Cloud	B+	73.1%
Coralogix	B+	72.8%
Broadcom	B+	71.9%
IBM	B+	71.6%
ManageEngine	B+	69.9%
LogicMonitor	B	68.0%
Sumo Logic	B	67.9%
ScienceLogic	B	67.8%
New Relic	B	67.7%
Chronosphere	B	67.6%
Fabrix.ai	B	66.0%
Honeycomb	B-	62.1%
SolarWinds	B-	61.9%
Zenoss	B-	61.2%
OpsRamp	B-	56.6%

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## About the Authors



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David Menninger leads the overall team for software research and advisory for supporting IT and expertise in AI software at ISG. With over three decades of experience in enterprise software, Dave's leadership has advanced digital transformation with information and insights for enterprises around the world.