

Customer Satisfaction with Application Delivery Controller Vendors

An ENTERPRISE MANAGEMENT ASSOCIATES® (EMA™) Market Research Report
Prepared for Citrix

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Executive Summary

- Enterprise Management Associates (EMA) conducted a primary research study of 450+ IT professionals to gauge their satisfaction with leading ADC vendors.
- EMA evaluated satisfaction across all phases of the customer engagement lifecycle.
- EMA focused on respondents who had experience with relevant ADC products from more than one vendor.
- Citrix NetScaler emerged as the clear leader in customer satisfaction over F5 Networks and Cisco Systems, scoring highest in 16 of 21 categories, including best overall satisfaction.

Introduction and Methodology

Application Delivery Controller (ADC) products serve as the front-end of virtualized data centers ensuring application availability, performance, optimization and security. Their critical role – enabling intelligent application delivery – has made ADCs essential components of enterprise infrastructure. As with any critical information technology investment, when it comes to selecting the right ADC solution, one crucial aspect which must be considered is the reputation of the vendor and the experiences of their customers.

In December 2009, Enterprise Management Associates conducted a primary research study to evaluate the experiences IT organizations have had with the three leading ADC vendors – Cisco Systems, F5 Networks, and Citrix NetScaler. Participants were asked to rate their satisfaction with each of the three vendors with which they had direct experience. Questions were asked across 21 different categories with responses ranging from 7 (Very Satisfied) to 1 (Very Unsatisfied). In all, over 450 participants took part, representing a broad range of organizational sizes, industry sectors, and titles/roles.

The objective of the study was to examine a holistic set of customer satisfaction experiences, spanning all phases of the product procurement and utilization lifecycle. In particular, we researched satisfaction at several key engagement phases, starting with sales and pre-deployment, followed by product deployment and then support and training experiences. We also researched participants' opinions on the business value of each vendor's solution, as well as the overall impressions of each solution provider.

To capture the most accurate picture of the relative differences between the three vendors, we narrowed the collected survey data to focus on only those respondents best able to evaluate ADC solutions. Two filters were applied before analysis was conducted. First, only those participants indicating experience with more than one vendor were included so that relative comparisons were possible. Second, only those who had experience with an ADC product which had been deployed for at least six months were included. This filter was applied to ensure respondents had adequate time to assess each vendor across all engagement phases.

It should also be noted here that in general, many ADC technology solutions are delivered not directly by the vendors but by their channel and services partners. Consequently, the findings of this study reflect on the aggregate experience regardless of who is involved in selling, delivering, and supporting the solution.

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ADC Customer Satisfaction – Structure and Findings

Sales and Pre-Deployment Services

The first opportunity an ADC vendor has to directly influence satisfaction is during the sales process, which encompasses much more than traditional interactions with a salesperson. It touches all aspects of the procurement cycle, including initial vendor qualification, proof of concept (PoC) evaluation, the purchase decision and deployment planning.

We tested the following seven customer satisfaction categories, and added an overall summary assessment of satisfaction with the sales and pre-deployment phase:

1. Demonstrated ability to recognize and understand specific customer business and technical requirements (Customer Understanding)
2. Ability to demonstrate solutions meeting specific customer requirements (Accuracy)
3. Ability to communicate and deliver on long-range solution plans that address future technical and business requirements (Vision)
4. Ability to offer product line, licensing and support options that best meet customer needs (Flexibility)
5. Willingness and ability to go the extra mile to make sure that products and solutions meet customer needs (Vendor Commitment)
6. Ability to work across multiple organizational teams to ensure all requirements are met (Inclusion)
7. Ability to provide timely access to the appropriate vendor teams to make projects successful (Responsiveness)
8. Ease of doing business during the sales and procurement process (Overall Satisfaction)

Across these categories, Citrix NetScaler and F5 enjoyed the most favorable responses, as can be seen in Figure 1. Citrix NetScaler was given highest marks in recognizing customer needs, demonstrating commitment, and being responsive towards meeting engagement timelines. F5 was given the top nod in accurately tuning demonstrations to requirements, communicating long-range plans, and working across organizational teams. The two vendors were virtually tied, with a slight edge for Citrix NetScaler, in offering flexible product, licensing, and support options as well as overall ease of doing business during this phase of the process.

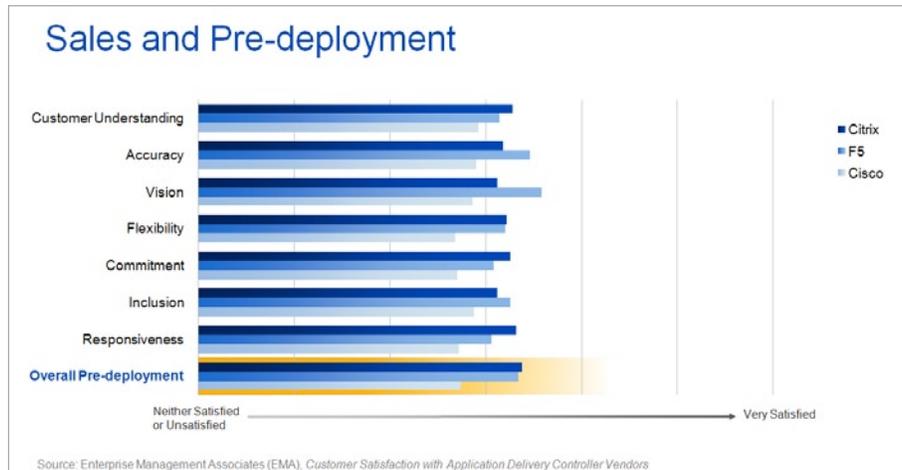


Figure 1. Sales & Pre-Deployment Satisfaction

Product Deployment

The next lifecycle step is product deployment and product experience. Quite commonly, channel or services partners are involved in this phase. It is during this time that IT practitioners, such as network managers and IT administrators, begin to accumulate significant direct experience with the products, better judge how the selected product will work in practice, and see how well they will be able to manage the solution operationally. Success in this phase is an important bridge between procurement and long-term satisfaction with the vendor’s solution. Respondents provided feedback on three categories of satisfaction related to the deployment and use of ADC solutions:

1. Ease-of-use experience with the solution
2. Quality of vendor’s deployment services (e.g., installation or consulting services)
3. How good of a technology is the vendor’s ADC product

As can be seen in Figure 2, respondents indicated that they were significantly more satisfied with Citrix NetScaler than with either F5 Networks or Cisco Systems when evaluated on ease of use during deployment. Respondents had virtually no relative difference in opinion between Citrix NetScaler and F5 when asked about quality of deployment services. In terms of ADC technology Citrix NetScaler and F5 Networks enjoyed similar high levels of satisfaction, and both outpaced Cisco Systems by a considerable margin.



Figure 2. Product Deployment Satisfaction

Support and Training

Once an ADC has been deployed into a production environment, the focus inevitably turns towards actual results and success in capturing the benefits promised during the earlier lifecycle stages. The bulk of the customer experience at this stage is based on interaction with the vendor’s support and training organizations. There are also instances, however, when a broader set of constituencies will be involved, including account managers, sales engineers and even executives within the vendor’s organization. We asked respondents about this phase of the lifecycle in terms of the six following specific categories:

1. Responsiveness of technical support services
2. Product and technical knowledge of technical support services teams
3. Effectiveness of technical support services teams in solving product issues
4. Sustained commitment – dedication to maintaining collaboration across sales, support and pre- sales engineering so that projects are successful over the long term
5. Effectiveness of available product training
6. Overall satisfaction of the vendor’s support services

Respondents demonstrated clearly higher levels of satisfaction with Citrix NetScaler across this phase as compared to both F5 Networks and Cisco, with only one exception, as seen in Figure 3. A definite preference for Citrix NetScaler was observed when technical support responsiveness, technical support product knowledge, and overall quality of technical support were measured. F5 Networks clearly got top satisfaction marks in terms of product training. There was no substantial difference between Citrix NetScaler and F5 when rated on sustained commitment, but Citrix NetScaler emerged as slightly favored in terms of technical support effectiveness.



Figure 3. Support and Training Satisfaction

Business Value

After any solution has been in production for a sufficient period of time, it is essential to assess whether it has delivered the promised business value. This is especially important when a dedicated business case justified the procurement and deployment of the solution. For this assessment, we asked respondents about how satisfied they were regarding the business value aspects of their ADC solution:

1. Return on Investment – solution has delivered promised savings by lowering costs, improving availability, protecting information, and/or improving application experience
2. Investment Protection – solution delivers a viable future path for addressing future needs via incremental extensions or upgrades versus wholesale replacement
3. Overall value provided by the vendor’s solution and services

In terms of ROI and investment protection, participants reported clearly higher levels of satisfaction with Citrix NetScaler than with either F5 Networks or Cisco Systems, as shown in Figure 4. In terms of overall business value, there was not a meaningful difference observed between responses for Citrix NetScaler and F5, although a slight edge could be acknowledged for Citrix NetScaler. Cisco Systems clearly lagged the other two by a significant margin in the business value category.

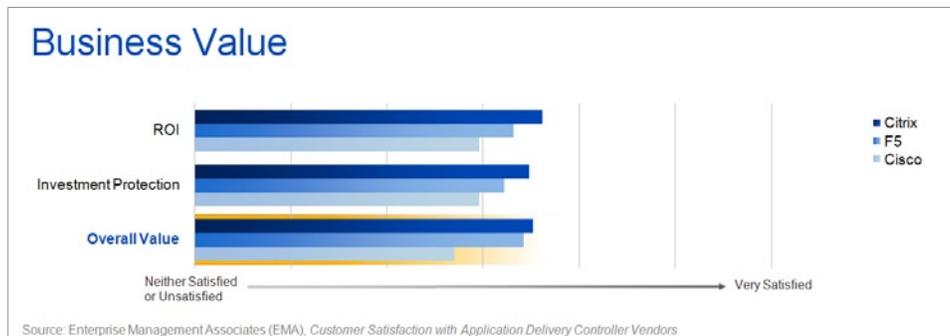


Figure 4. Business Value Satisfaction

Summary Assessments

Looking across all phases, it is important to understand the aggregate opinions and experiences of professionals who have deployed ADC products from the three vendors researched. It is these aggregate experiences upon which customers conclude whether they have made the best choices for their organization. To better understand these aggregate vendor assessments, we included a summary question in the survey to gauge participants' satisfaction with the three ADC vendors by asking, "How satisfied are you with the vendor overall?" As can be seen in Figure 5, respondents scored Citrix NetScaler significantly higher than both F5 Networks and Cisco Systems when asked this question.

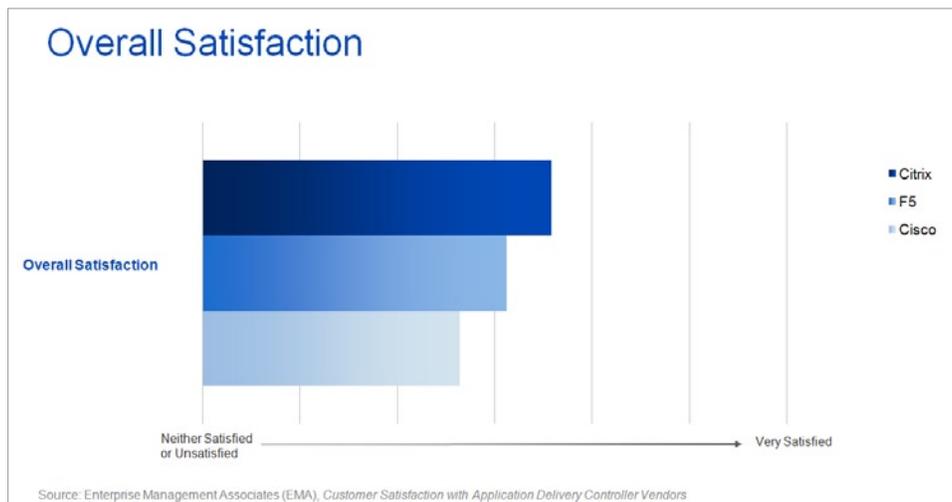


Figure 5. Summary Satisfaction

Broad Trends and Findings

In order to assess the total experience and satisfaction organizations were having with Application Delivery Controller technology solutions, EMA collected data not just from front-line technical personnel who deploy and use ADCs, but also from professionals and practitioners involved elsewhere in the planning, assessment, justification, procurement, deployment, and ongoing support of ADCs. Titles ranged from IT-related administrator to CIO. And while 70% of participants indicated that they were working within an "IT/IS/Network/Internet/Web" department, the remaining 30% were scattered around a variety of supporting or line-of-business organizations but who still had a direct interest or involvement in the selection, deployment, or ongoing use of ADC solutions.

Within this range of personnel we found some interesting trends and patterns. First, most respondents reported that they have products from more than one ADC technology provider currently in use, indicating this is still an active and competitive area of technology development. Second, there were clear differences in levels of satisfaction between the user roles/responsibilities and company size, but not noticeably between industry verticals, indicating that ADC technology is maturing and finding broad success but that some providers are better attuned to specific organizational needs than others. Further on the variations in satisfaction levels by role, we found that, in general, technical individual contributors were much less satisfied across the board, in all categories, with all of the ADC technology vendors than those in management roles, indicating that there are still opportunities for improvement in meeting the needs of front-line operations and upper-tier planning professionals

EMA Analysis

EMA researchers determined that relative rankings are the most effective indicator of which vendor is best meeting the needs of customers. As such, the analysis focused on respondents who had direct experience with more than one of the three vendors researched.

The patterns of responses demonstrate something about the source vendor organizations themselves. For instance, on a relative basis, Cisco has achieved better customer satisfaction within smaller organizations and among certain technical disciplines, most particularly IT architects. Also on a relative basis, F5 demonstrated the best satisfaction results among higher-level business executives. F5 also showed its greatest overall strength of experience within the sales and pre-deployment phase, which would be expected for a company that is relatively less channel-centric in its distribution. This is not to say that Cisco and Citrix do not have dedicated teams which focus on ADC solutions (they do), but rather that their broader organizational span and reputation influences expectations, and hence the basis from which satisfaction perceptions evolve.

Based on the research results from this study, Enterprise Management Associates[™] concludes that Citrix NetScaler enjoys higher levels of satisfaction by IT professionals across the broadest range of measures when compared against both F5 Networks and Cisco Systems. Citrix NetScaler was rated most favorably in 16 of 21 categories, and by a significant margin in seven of those categories. Second highest responses were accorded to F5, who was most favored in five of the 21 categories, three of which were by significant margins. Cisco Systems did not fare as well as the other two, managing to achieve a close tie in one category but never ending up as most favored in any of the categories included in this research.

Enterprise Management Associates[™] concludes that Citrix NetScaler enjoys higher levels of satisfaction compared against both F5 Networks and Cisco Systems.

About Citrix

Citrix Systems, Inc. is a leading provider of virtualization, networking and cloud computing solutions for more than 230,000 organizations worldwide. Its Citrix Delivery Center[™], Citrix Cloud Center[™] (C3) and Citrix Online product families radically simplify computing for millions of users, delivering desktops and applications as an on-demand service to any user, in any location on any device. Citrix customers include the world's largest Internet companies, 99 percent of Fortune Global 500 enterprises, and hundreds of thousands of small businesses and prosumers worldwide. Citrix partners with over 10,000 companies worldwide in more than 100 countries. Founded in 1989, annual revenue in 2009 was \$1.61 billion.

Appendix A – Survey Questions

Following is a complete list of the questions asked of survey participants. Note that questions 12-25 were repeated for each of the three focus vendors (Cisco Systems, F5 Networks, and Citrix NetScaler)

- 1.1 Which of the following best describes your role in the organization?
- 2.1 Which of the following best describes the department or functional area in which you work?
- 3.1 You have indicated that IT/IS/Network/Internet/Web best describes the department or area in which you work. Within this area, which group do you belong to?
- 4.1 How many employees are in your company worldwide?
- 5.1 Which of the following best describes your company's primary industry?
- 6.1 In which geographical region are you located?
- 7.1 Are you responsible for or are otherwise involved with load balancer and/or application delivery controller (ADC) solutions that are used to distribute and/or optimize network traffic to servers? (Yes/No)
- 8.1 From which of the following vendors does your company currently use a load balancer/application delivery controller solution? Select all that apply.
 - Array Networks
 - Brocade/Foundry
 - Cisco Systems
 - Citrix NetScaler
 - F5 Networks BIG-IP
 - Nortel/Alteon
 - Radware
 - Zeus Technology
 - Other (Please specify)
- 9.1 In which geographical regions does your company operate?
- 10.1 What is your organization's annual sales revenue?
- 11.1 What is your organization's annual IT budget?
- 12.1 Is your company currently using <Vendor Name> application delivery controller product(s) such as <Vendor List – see Appendix B> (Yes/No)

- 13.1 Which <Vendor Name> application delivery controller product(s) does your company use?
(See Appendix B for product list by vendor)
- 14.1 Did you deal with resell or distribution partners exclusively during the purchase and installation of this product? If so, who were the partners that you dealt with?
- 15.1 Please answer the following section based on your company's experience with <Vendor Name> application delivery controller products.
- 16.1 Overall, how satisfied are you with <Vendor Name>?
- 17.1 What is the most important thing that <Vendor Name> can **improve**?
- 18.1 Please indicate how **satisfied** you are with <Vendor Name> sales and pre-deployment services in each of the following areas.
- Cognition – demonstrated understanding of your specific business and technical requirements
 - Accuracy – ability to demonstrate solutions meeting your specific requirements
 - Vision – ability to communicate and deliver on long-range solution plans that address your future technical and business requirements
 - Flexibility – ability to offer product line, licensing and support options that best meet your needs
 - Commitment – vendor goes the extra mile to make sure that products and solutions meet our needs
 - Inclusion – ability to work across multiple organizational teams to ensure all requirements are met
 - Responsiveness – vendor provides timely access to the appropriate vendor teams (e.g. sales, support, pre-sales engineering) to make our projects successful
 - Overall – ease of doing business during the sales and procurement process
- 19.1 Please indicate how **satisfied** you are with the process of deploying <Vendor Name> solutions in each of the following areas.
- Ease of use experienced with the solution during deployment and in production
 - Quality of deployment services (e.g. installation or consulting services)
 - Effectiveness of training available for the solution
- 20.1 Please indicate how **satisfied** you are with <Vendor Name> post-deployment services in each of the following areas.
- Quality of technical support services, in terms of responsiveness
 - Quality of technical support services, in terms of support team's product and technical knowledge
 - Quality of technical support services, in terms of ability to effectively help in solving product issues
 - Sustained Commitment – dedication to maintaining collaboration across sales, support, and pre-sales engineering so that projects are successful over the long term
 - Overall – quality of technical support services

- 21.1 What are your current impressions of <Vendor Name>?
- 22.1 Please rate your **agreement** with the following statements on your business value experienced with <Vendor Name>.
- Value – solution offers the best level of functionality and performance for the price
 - Investment Protection – solution delivers a viable future path for addressing future needs via incremental extensions or upgrades versus wholesale replacement
 - Return on Investment – solution has delivered promised savings by lowering costs, improving availability, protecting information, and/or improving application experience
- 23.1 Name three (3) qualities you associate with <Vendor Name>?
- 24.1 Please rate your satisfaction with...
- <Vendor Name> application delivery controller products as an overall technology solution
 - <Vendor Name> as an overall technology provider
- 25.1 Is there anything you would like to add regarding your satisfaction with <Vendor Name>?

Appendix B – ADC Product Lists

Following are the specific ADC products which were included in this research. Only those respondents who indicated that they had deployed one or more of these products were included in the analysis, as described in the “Introduction and Methodology” section of the paper.

Cisco Systems

- CSM (for Catalyst Switch)
- CSS Appliance
- ACE Module (for Catalyst Switch)
- ACE Appliance

Citrix NetScaler

- NetScaler MPX 17000
- NetScaler MPX 15000
- NetScaler 12000
- NetScaler 10010
- NetScaler MPX 9500
- NetScaler 9010 FIPS
- NetScaler 9010
- NetScaler MPX 7500
- NetScaler 7000
- NetScaler MPX 5500
- NetScaler VPX

F5 Networks

- BIG-IP Local Traffic Manager (LTM)

About Enterprise Management Associates, Inc.

Founded in 1996, Enterprise Management Associates (EMA) is a leading industry analyst firm that specializes in going “beyond the surface” to provide deep insight across the full spectrum of IT management technologies. EMA analysts leverage a unique combination of practical experience, insight into industry best practices, and in-depth knowledge of current and planned vendor solutions to help its clients achieve their goals. Learn more about EMA research, analysis, and consulting services for enterprise IT professionals and IT vendors at www.enterprisemanagement.com or follow [EMA on Twitter](#).

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