SOLUTION SELECTION MATRIX

2025 | Enterprise Quality Management Software Guidebook

LNS Research

Overview

Taking quality to the next level is necessary in the age of modern, fast-paced manufacturing. Enterprise Quality Management Software (EQMS) is increasingly seen as essential to a well-run quality organization. An EQMS is the process engine for quality and value chain partner functions to establish and maintain disciplined execution of quality processes across a diverse plant footprint. The adoption trend has been consistently upward over the past several years, finally breaking through the 30% adoption level in 2022. This escalating adoption trend will continue into the foreseeable future. EQMS is now seen as essential to the quality leader's effectiveness.

LNS Research was an early and consistent leader in research and advisory in the quality space, advising some of the world's largest industrial companies on their approach to quality. Early in the research practice for quality, EQMS adoption was low, and making no decision was the biggest competitor in the buying decision. This is no longer the case.

This EQMS Solution Selection Matrix (SSM) is based on our research and provides our point of view on this growing and dynamic market. It's intended for industrial organizations to better understand EQMS as a software category, assist in identifying vendors offering viable solutions for standardizing and harmonizing quality processes, and enable a Collaborative Quality Transformation.

Definition of EQMS Category

LNS Research defines Enterprise Quality Management Software (EQMS) as commercially available, productized software that:

- Provides a licensable software-based product, offering quality management and quality control functions.
- The vendor has a dedicated go-to-market focus on and presence in industrial sectors, e.g., Life Sciences, Aerospace and Defense, Automotive, Chemicals, and Oil and Gas, with several cloud customers in place (beyond the first MTC Version).

Enterprise Quality Management Systems are software systems with a broad range of possible capabilities, from a basic digital process engine for processes supporting any number of quality registration protocols to potential application environments for Machine Learning and Analytics applied to core quality processes and functions supported by large datasets from various sources across the digital enterprise, enabling Collaborative Quality Transformation. EQMSs have the inherent flexibility to embed digital capabilities within the EQMS domain and/or interconnect with those digital capabilities in other architectural elements.

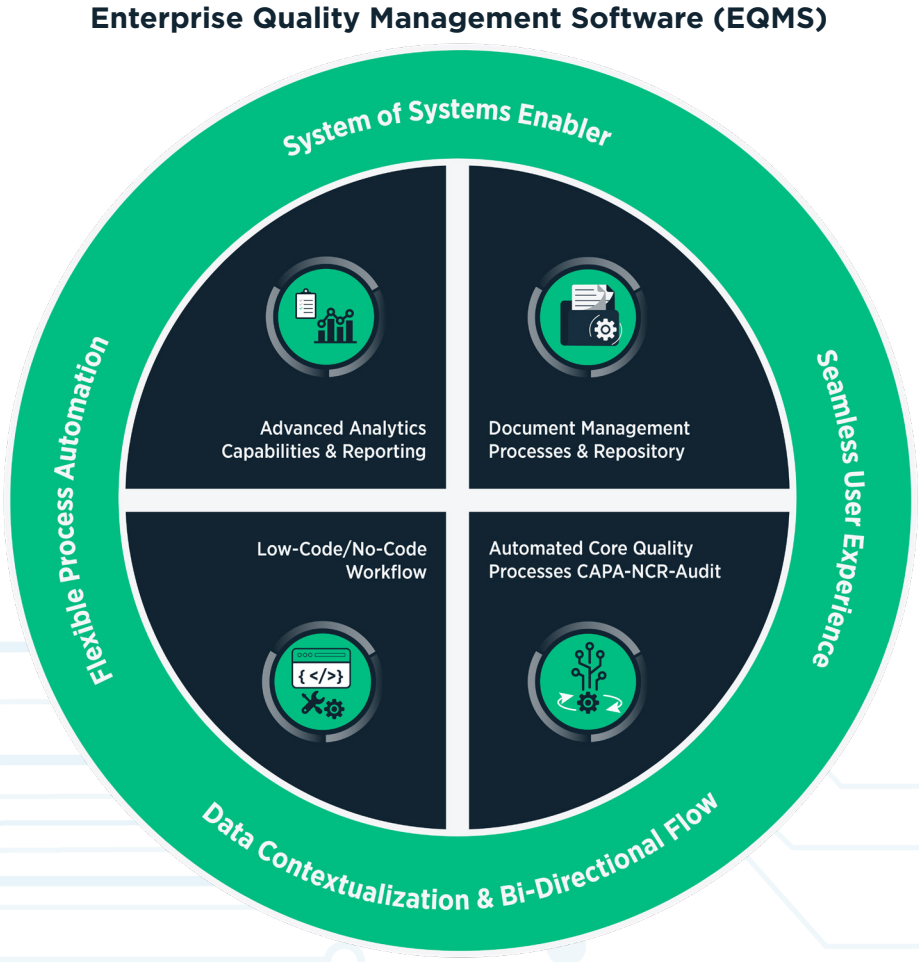

Figure 1: Enterprise Quality Management Software Definition

EQMS Within the LNS Research IX Reference Architecture

In 2024, LNS Research refreshed our vision for how industrial organizations can most effectively leverage the value of digital technologies: The Industrial Transformation (IX) Reference Architecture (Fig. 2). EQMS is typically an enterprise application, although some in this SSM are focused on plant-level quality but support the same criteria that define the space and are, therefore, included here.

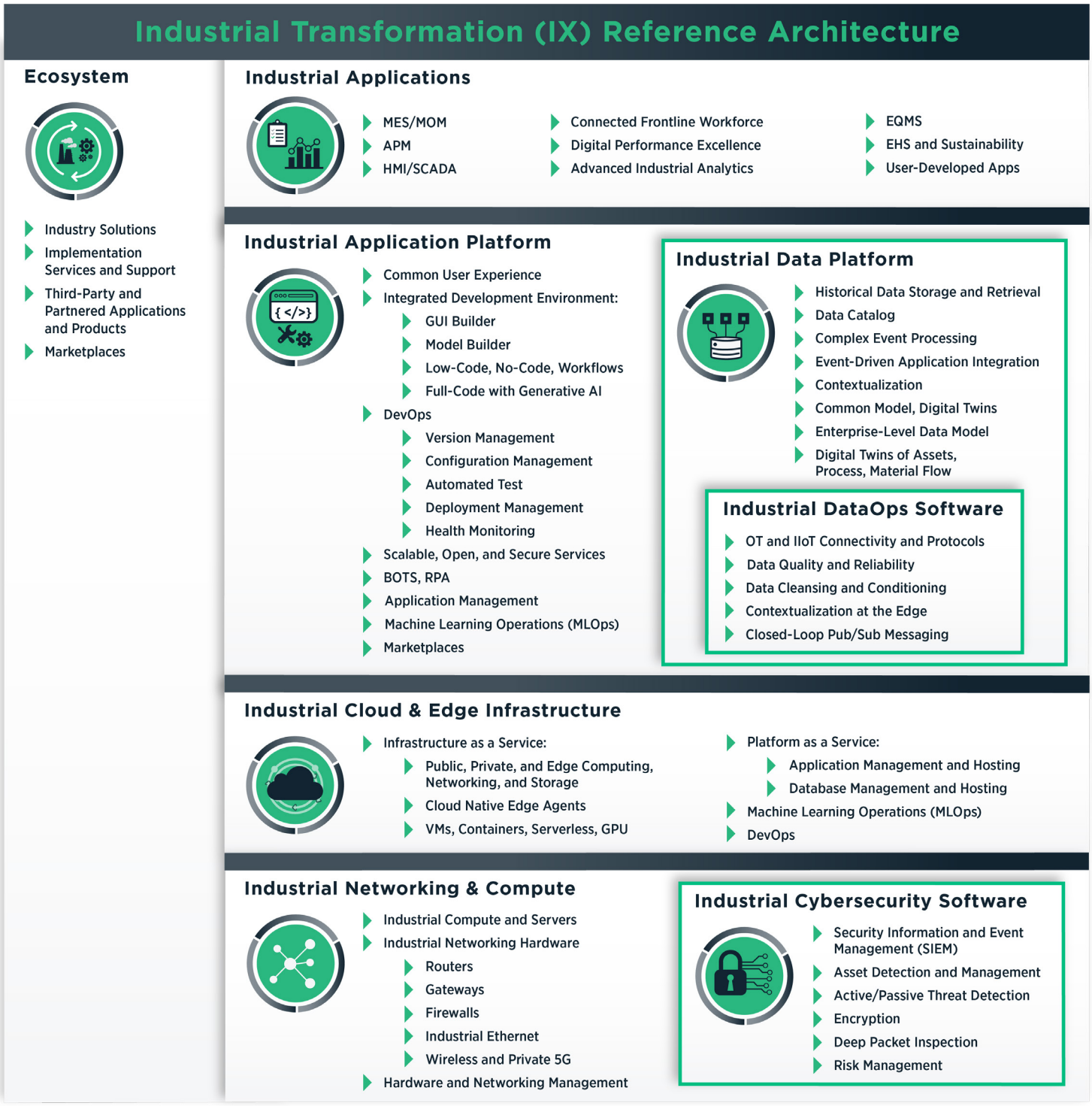

Figure 2: IX Reference Architecture

EQMS Within the LNS Research IX Reference Architecture (Cont.)

Manufacturers have three architectural paths in the pursuit of IX and the development of an IX Architecture: "Custom," "Best-of-Breed," or "Vendor Ecosystem," as illustrated in Figure 3. Often, these are not black-or-white decisions, and the reality is that a combined approach is often taken.

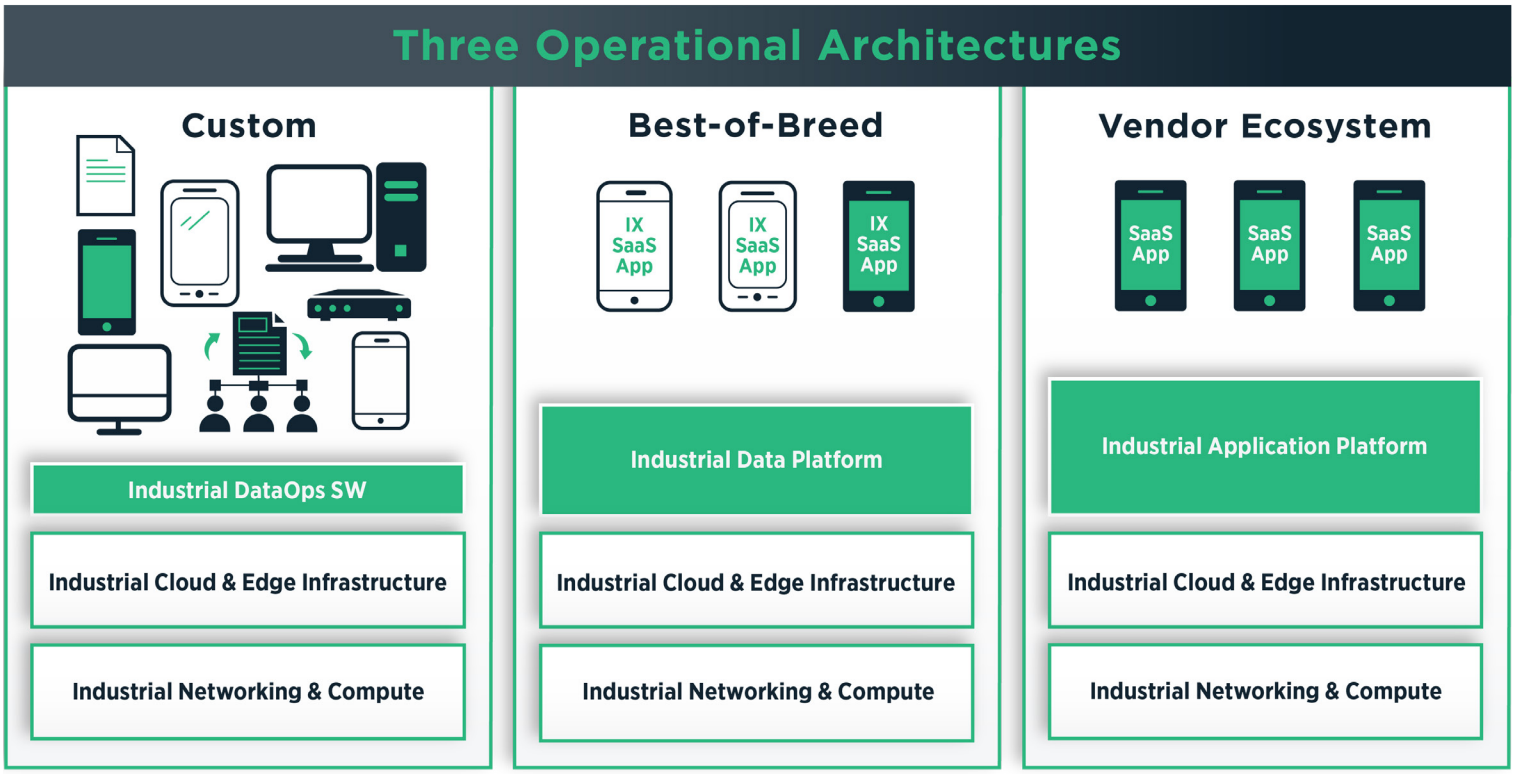

Figure 3: IX Architectural Approaches

For this SSM, each of these lanes has offerings to consider. The Vendor Ecosystem path tends to be a larger decision, with far-reaching impacts across the organization, so it is less likely that EQMS will be the entry point for these kinds of decisions, but rather the path of least resistance for a decision that has already been made in another part of the company.

EQMS Enabling Technologies

EQMS potentially interacts with a wide variety of purpose-built software systems, from PLM to CFW and CRM systems, among others. EQMS solutions typically employ Flexible Process Automation to automate processes and decision-making to the greatest extent possible, reducing manual touchpoints, applying analytics on contained processes, and some level of Machine Learning. These advanced digital capabilities may reside in the EQMS software itself, but may also be accessed from outside the EQMS.

Evaluation Methodology

The LNS Research approach to selecting vendors for evaluation in a technology category SSM begins with establishing a set of inclusion and exclusion criteria to screen potential vendors. Based on market knowledge and initial screening, a survey is sent to selected vendors to gather data regarding their products and participation in the EQMS space. Survey data is supplemented with information obtained from vendor briefings. We also request and speak with customer references. Then, we use the available information to score each vendor according to our "LNS Research 3P Evaluation Model," covering Product, Potential, and Presence dimensions (the 3P methodology is explained in detail later on in the section titled *"3P Evaluation of EQMS Vendors"*).

Scoring is based on the following:

1. 3P evaluation criteria (Product, Potential, and Presence)
2. Knowledge of the vendor, their products, and services
3. End-user customer feedback and reference discussions
4. LNS Research industry experience and judgment

LNS Research, in its sole discretion, determines which vendors are included in the SSM. This includes excluding vendors who, in our judgment, do not adequately meet the inclusion criteria, didn't respond to or complete the survey, or did not provide customer references.

Those vendors selected to be included in the EQMS SSM are given an opportunity to review their individual profiles for factual correctness prior to publication. LNS Research reserves the right to update the SSM and the individual vendor profiles at any time.

Vendor Selection and Inclusion Criteria

LNS Research has developed inclusion and exclusion criteria consistent with our definition of the EQMS category. Vendors identified for potential inclusion in this SSM were screened according to these criteria.

Inclusion Criteria

The universe of EQMS solution vendors is large and diverse in terms of vendor characteristics, product scope, and go-to-market strategy. There are many niche players and point solution providers outside the realm of EQMS, as defined by LNS Research. Vendors identified for potential inclusion in this SSM were screened using the following inclusion criteria:

- Proven capability to provide customers with a complete solution to deliver on the vendor's value proposition. Solutions may be delivered through in-house product and service offerings, complemented by established partnerships.
- Functionality to support a broad range of use cases across quality operations, such as Supplier Management, Complaint Management, Warranty Management, Process and Product Quality Monitoring, and Improvement/Problem-Solving, with the capability to flexibly meet new and changing use case requirements.
- Embedded or partner-integrated digital technologies like AI/ML, IoT, RPA, Advanced Analytics, and Data Connectivity available on the current release, cloud-native application with several installed instances operating on private or public multi-tenant cloud, and supported hybrid/edge cloud architectures (Web front end).
- Includes minimally the five required core quality processes for: Control of documents, Control of records, Performance of internal audits, Control of non-conformity, and Corrective & Preventive Action (CAPA).

Exclusion Criteria

To help ensure only vendors with product offerings consistent with the LNS Research definition of the EQMS space were considered, LNS Research excluded these types of product offerings:

- Simple mobile apps, e.g., mobilization of an existing backend application(s) and mobile apps that don't incorporate specified additional digital technologies.
- Applications that meet the minimum criteria for an EQMS, except where it is for an on-premise installation only, without a cloud-native option for private cloud or multi-tenant public cloud capabilities. Legacy software sitting on a private cloud without a web app front end is not included.
- Companion application with some but not all core functionality defined for an EQMS (i.e., CFW applications, with training and certification management included, or Low-Code/No-Code Workflow engines without core quality processes, document management repository, and management process capabilities).
- Single-use case solutions (narrow, isolated solutions, e.g., operator rounds only, Analytics, or Audit only)
- Solutions with other primary functions (such as EHS, MES, or ESG) where some EQMS functionality may exist but is not supported by an EQMS sales strategy and customer adoption outside the other functionality sales lane. (i.e., EQMS as "me too" to the main EHS sales strategy)
- Generic platforms and toolkits that do not have packaged Enterprise Quality Management functionality, even if the toolkits can be used to develop such an application:
    - Low-code/No-code development tools
    - Pure workflow tools
    - Business intelligence (BI) tools
    - Generic collaboration tools

Vendors Included

LNS Research identified 16 vendors for inclusion in the 2024 EQMS Solution Selection Matrix (SSM). These vendors substantially fit our inclusion criteria and, in our judgment, represent significant market players, both established and emerging. Given how dynamic the EQMS space is, it's not feasible for this to be an exhaustive vendor list. However, we believe this set of vendors corresponds well to current and emerging market leaders in the EQMS space and provides insight to industrial organizations considering an EQMS vendor selection process.

The 16 vendors included in the SSM are:

- **AlisQI:** Fully featured solution for small to medium businesses without a full complement of enterprise software, gaining market traction beyond their home region of Benelux. Recent wins in North America. Highly flexible, composable application with robust data and device connectivity and middle-of-the-road analytical capabilities.
- **ComplianceQuest:** Built on the stable Salesforce platform, ComplianceQuest is building out its suite of capabilities for moving into design quality. ComplianceQuest focuses on Life Sciences companies but has customers in other industrial sectors. Like several others, ComplianceQuest is rapidly integrating generative AI Chatbot capabilities across its application set.
- **ETQ (Reliance - NXG & CG):** ETQ's Reliance NXG and CG application sets are kept current in a locked step, enabling the end user to make an easier decision about switching to the cloud. ETQ is a broad market pure-play EQMS with the industry's largest set of pre-built applications, with over 40 unique OOB applications.
- **Greenlight Guru:** Greenlight Guru is a small medical device-specific EQMS solution for small device company start-ups. It goes to market as an "expert-crafted, Out-of-Box (OOB) application." It focuses heavily on training and education about regulatory requirements specific to medical devices for entrepreneurs without a lot of experience.
- **Honeywell Life Sciences (TrackWise Digital):** Honeywell Life Sciences (HLS) TrackWise Digital EQMS is built on the stable Salesforce Platform and provides access to the manufacturing floor and quality control capabilities through Honeywell's manufacturing execution system, MXP. HLS has access to leading environmental control technology and Honeywell's Forge Digital Platform.
- **Intellect:** Its extensive application library and low-code citizen-developer environment allow many different companies to do many things. Intellect is building additional capabilities and moving upmarket.
- **IQVIA (SmartSolve):** SmartSolve is a dedicated Life Sciences EQMS. SmartSolve goes to market as a pre-configured Out-Of-Box (OOB) solution designed by a team with deep industry experience.

- **MasterControl (QX):** MasterControl is betting on EQMS's pivot from a compliance-only solution to a data-first orientation, potentially enabling a customer-experienced quality competitive advantage. MasterControl is one of the few EQMS solutions that has onboarded Advanced Industrial Analytics capabilities and extensive data connectivity.
- **Oracle (Fusion EQMS):** Oracle Fusion EQMS is a product design-oriented solution within an operations-oriented software environment. It is one of the few EQMS solutions in this SSM that are aligned to a product development orientation. Oracle has the additional advantage of close interoperability with its Fusion ERP and PLM solutions.
- **PTC (Arena EQMS):** PTC's Arena EQMS offering is paired with their Arena PLM product to accomplish the digital thread/requirements flow-through from product design to shop-floor execution and Bill of Material (BOM) change control.
- **QAD:** QAD's EQMS is oriented around product design requirements flow-down, which is how Automotive, Aerospace, and Defense companies view the world. The QAD EQMS has the functionality you would expect to support the digital thread. QAD has taken the "vertically integrated" business approach, with supporting software from ERP to MES and Analytics.
- **Qualityze:** Built on the Salesforce platform, Qualityze's capabilities span the essentials of quality management for smaller Life Sciences companies. Qualityze's deployment strategy is primarily an out-of-the-box set of pre-built applications informed by deep industry expertise on its development team.
- **Rockwell Automation (Plex EQMS):** Rockwell Automation's Plex EQMS is a manufacturing shop-floor-focused EQMS, one of the few in this SSM to have this orientation. Plex is built around Rockwell Automation's strength in automation and stitching together digital sensor data from manufacturing equipment.
- **Siemens (Digital Quality Solution):** Siemens Digital Quality Solution accomplishes the requirements flow through an innovative, industry-leading, seamless flow from CAD drawings to controlling documents and inspection plans.
- **SAP (QM):** SAP Quality Management concerns the quality aspects of material movement into, within, and out of a manufacturing company. SAP QM functionality is embedded in the SAP ERP platform.
- **Veeva (Quality Cloud):** Veeva is the largest and broadest EQMS software provider for Life Sciences companies. It has built capabilities to support R&D, Manufacturing, Quality, Laboratory, and Clinical support.

The SSM shows each vendor's relative position based on the 3P Evaluation Model methodology and provides individual vendor profiles with further commentary on our assessment.

EQMS Market Landscape

Several factors must be considered when deciding which path to take. One important decision is to define your value proposition to your customer. Consider the following definitions based on organizational orientation:

- **Engineering Orientation:** "We deliver value by creating solutions that delight our customers, build brand loyalty, and give us a competitive advantage."
- **Operations Orientation:** "We deliver value by safely managing industrial assets to optimize quality, cost, and productivity to achieve competitive advantage."
- **Supply Chain Orientation:** "We deliver value by managing a supply and demand network to optimize inventory, capacity, and lead time to achieve competitive advantage."
- **Service Orientation:** "We deliver value by creating customer intimacy, fostering long-term trusted relationships, and offering solutions that help customers achieve their desired outcomes."

There are EQMS solutions that align with all of these value propositions. LNS Research defined four different categories of EQMS in this published blog. These categories are:

1. **Stand-alone (Pure-Play) EQMS.** These solutions are independent of any particular companion software and generally can interoperate with many different companion software applications across the enterprise. Some of these are industry-focused solutions, but most in this category are broad general market players.
2. **Product Lifecycle Management-based EQMS.** These EQMS solutions are heavily weighted toward the straight line from product design and development to manufacturing and customer support. They are best for organizations that identify with the Engineering Orientation above.
3. **Enterprise Resource Planning-based EQMS.** These EQMS solutions are for those with an Operations Orientation. Their value proposition is based on the ability to execute and deliver from asset-intensive manufacturing, and concern for consistency is paramount.
4. **Integrated Suites EQMS.** These solutions focus on a particular industry. These are typically regulated industries with specialized requirements, such as Life Sciences, Aerospace and Defense, and Automotive. An essential common requirement across these industries is a digital thread.

As you read this, you might think, "What if I have more than one orientation? Does that mean I need more than one EQMS?" In short, no. All of the EQMS in this SSM meet the basic requirements from the definitions section above. These orientation-based subsets mean that those EQMS in a particular orientation do the things associated with being in that orientation particularly well. Still, this doesn't mean that they don't do the other things associated with the overall definition of the software category.

Ideally, a properly selected EQMS Application helps companies meet their quality challenges while optimizing operational performance across safety, quality, and productivity dimensions.

The range of capabilities of EQMS lies along a continuum from Quality Process Automation to Collaborative Quality enabling, represented in Figure 4 below.

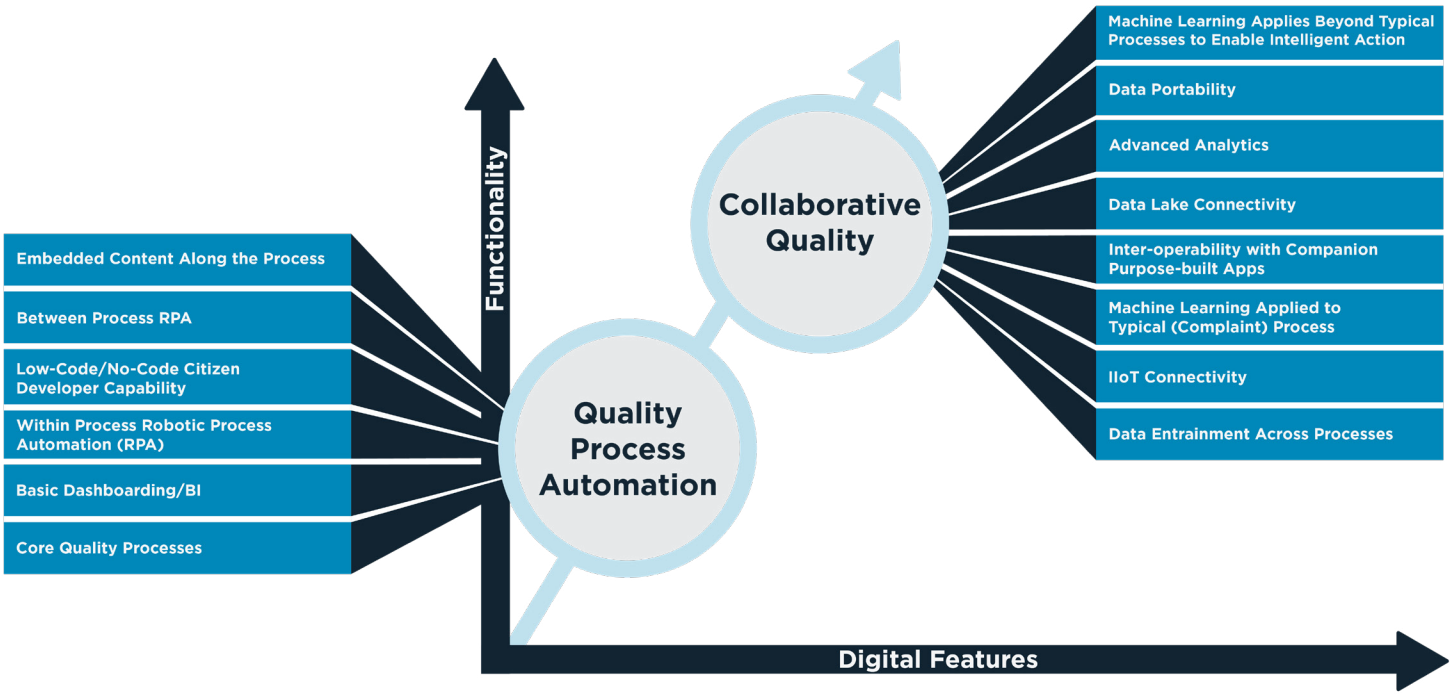

Figure 4: Capabilities of EQMS

3P Evaluation of EQMS Application Vendors

LNS Research has developed a framework called the "LNS Research 3P Evaluation Model" to help qualitatively position vendors in a specific technology category. This model considers the dimensions of product, potential, and presence when evaluating a vendor's offering to the market in the relevant category. We applied this methodology to develop the EQMS Solution Selection Matrix (SSM).

Product

As previously stated, LNS Research evaluates product offerings in a specific technology category against the relevant components of the LNS Research IX Reference Architecture. In the case of EQMS, the main focus is on the most essential Analytics, Development Tools & Libraries, and Ecosystem components.

In our definition of the EQMS category, analytics are viewed as a core solution enabler. This is reflected in the corresponding product evaluation criteria, which stress functional capabilities and platform technology features, including special or unique capabilities. The detailed EQMS product evaluation criteria are shown in Table 1.

Table 1: EQMS Product Evaluation Criteria

EQMS: Product Evaluation Criteria

Functionality | Key Capabilities	Selected Vendor Highlights (1)
Functional Capabilities	
Core Compliant Quality Processes • Digital work instructions • Compliant document management • Central knowledge repository • Core required processes	**MasterControl:** Drag & drop workflow process authoring builds procedure documentation simultaneously. **Honeywell Life Sciences** (HLS, formerly Sparta TrackWise) displays, edits, and manages documents entirely within the interface.
Flexible Capabilities • Citizen Developer environment • Process Validation Support • Robotic Process Automation (RPA) within/between processes and between platforms • Seamless User Experience aspect of utilization of the features	**ETQ:** seamless user experience through a partnership with Augmentir. **MasterControl:** "One-button push" automated process validation. **Intellect:** A low-code workflow builder with an extensive RPA offering.
Robust Data & Device Connectivity • IIoT device connectivity • Data Lake Connectivity • ISA-95 Stack Data flow through and connectivity	**MasterControl:** Data-first platform. Able to connect virtually any application or device. **Oracle Fusion:** Oracle aligns to several lanes with strong capabilities for requirements flow down from engineering & design to manufacturing equipment monitoring, notification, and anomaly detection.

Data Portability • Data flows into, through, and out of the EQMS with companion applications in the IX architecture	**Veeva:** Veeva ID capability enables collaboration between process owners and CMO/CDMO suppliers. **Qualityze:** Qualityze relied on the API approach to port data from the Qualityze platform to any application requiring quality data.
Advanced Analytics • Analytics-based escalation triGreenlight Guruers for process health • Embedded capabilities for large datasets • Flexibility to leverage Advanced Analytics from an outside source (if applicable) • Application of AI/ML	**AlisQI:** Embedded Statistical Process Control capabilities. **MasterControl:** White labelled Advanced Industrial Analytics capability.
Reporting/BI Visualizations • Basic process health reporting for embedded processes	**ComplianceQuest:** Extensive and flexible BI display capability. **IQVIA:** TIBCO Spotfire implementation for BI capability. **Qualityze:** Leveraging Salesforce Tableau empowers users to go deeper than basic insights to customized visualizations.
Other non-traditional applications and Ancillary Functional Responsibility Monitoring	**ETQ:** Largest suite of applications in the space. **Intellect:** Extensive application offering. **HLS:** The risk overview module summarizes and makes risk easier to see and act on rather than manage in every FMEA document.
Industry Specific Highly regulated industry-specific requirements such as; • FDA regulation compliance and reporting. • ITAR, FAA & other A&D regulator agency compliance and reporting. • FSMA regulations and standards • Automotive-specific requirements for APQP, PPAP, etc.	**Veeva:** The Vault suite of products supports monitoring and reporting on clinical trials and patient data. **Siemens:** Digital Quality Solution is part of a product's digital thread, from a CAD Drawing to product realization activities and closing the loop back to designs of performance information. **PTC (Arena):** Strength in requirements flow-down and deep, complex Bill of Materials (BOM) management.

Platform | Technology Features	
Solution agility/flexibility • Workflow engine • Configurability • Extensibility • No-code/Low-code • Validation Control & Management	**ETQ:** Exposes the same workflow to developers that they use for end users. **Siemens:** Digital Quality Solution has many OOB (out-of-the-box) applications, but also allows citizen developers to configure their own unique workflows using Mendix. **Intellect:** Heritage as BPM software enables very configurable citizen developer capabilities.
System and data integration • Open APIs/SDKs • Pre-build connectors • IoT data integration • Data distribution • Data lake connectivity	**Veeva:** Direct Data Integration empowers users to experiment with AI for their own specific use cases.
Architecture/Deployment • Flexible deployment • Connected and offline • Broad device support • Device management	**Intellect:** Cloud platform agnostic. ETQ: Maintains on-premise and cloud software versions in a locked-step development
Security and privacy • Application Security • Operational Security • Product Security • Privacy controls	Several inherent security practices and protocols are from their cloud network providers.

(1) Selected highlights of vendor capabilities illustrative of product strengths.

For each Vendor Profile, we use Harvey Balls to score the degree of product functionality or feature coverage, then determine an overall Product score from 1 through 6 based on the Product Definitions & Scale below.

Product Definitions and Scale

6. Market leading capabilities across the spectrum of key functionality as defined by LNS Research[1]; proven success meeting all requirements in markets specifically targeted by vendor[2].
5. Robust spectrum of capabilities for applicable target markets. Few shortcomings that are recognized.
4. Broad though not complete spectrum of capabilities applicable to target markets.
3. Limited but sufficient capabilities applicable to a subset of target markets; lagging in product development and functionality.
2. Some gaps in functionality required to be addressed to fully meet target markets.
1. Newly launched minimal viable product and/or significant gaps in functionality required to be addressed to fully meet target market requirements.

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[1]Assessments are made against the most relevant capabilities of the LNS Research IX Reference Architecture. For example, Enterprise Quality Management Software vendors would be judged mainly against & Analytics, Dev Tools, and Libraries capabilities.

[2]Target markets are the geographies and application areas specifically pursued by vendor. For example, vendors targeting only English-speaking markets will NOT be penalized for lack of two-byte character support.

Potential

LNS Research assesses the vendor's potential for growth in both the product and presence dimensions. Potential may be impacted by scale, focus, financial resources, market positioning strategies, the management team (especially for smaller companies), merger and acquisition plans, partnering strategy, and other relevant factors impacting the potential for further market penetration and business growth.

Dozens of vendors are seeking to carve out a niche in the EQMS market. In this report, we have only included companies we believe have an opportunity for growth and long-term viability. Since this is a relatively immature market, some early-stage/start-up companies are included because we believe their focus and technology enable competitiveness.

Potential Definitions and Scale

6. Likely overall market leader (across many industries, geographies, and application areas); currently outpacing all competitors.
5. Among small set of likely overall market leaders evidenced by current leadership in target markets and proven record of innovation.
4. A likely leader in some targeted markets with growth potential to move up; could rise to leading position in specific markets.
3. Likely a significant player in target markets with defensible barriers to competition and growth prospects.
2. Likely a niche player in target markets with some known risks to future growth in product and presence.
1. Early-stage company with wide dispersion of potential long-term performance and/or a niche player with significant risks to future growth.

Presence

LNS Research develops a composite Presence score assessing a vendor's market penetration vis-à-vis geographies, industries, and customer sizes served. The score factors both "capability to serve" and "proven success."

- **Capability to Serve:** Focused (experienced in the specific domain) sales, service resources, and product enhancements to serve specific target markets. Service and technology partnerships also play a key role.
- **Proven Success:** Market success (installed base) in the markets served, including customer references.

Each vendor's overall score from 1 through 6 is determined based on the following Presence Definitions & Scale.

Presence Definitions and Scale

6. Market leading sales, service[3] and successful customers globally, in all relevant industries, and with companies of all sizes.

5. Robust sales and service capabilities and successful customers across all major geographies (North America, Western Europe, Middle East[4] and industrialized Asia-Pacific), a range of industries and company sizes.

4. Broad-based sales, service, and successful customers across most major geographies (North America, Western Europe, and selected Middle East and Asia-Pacific countries), specific industries and/or companies of a specific size (SMB, for example).

3. Regional sales, service, and customer success in select major western geographies; select industries and sizes.

2. Sales, service, and customer success in limited market(s), industry, and company sizes.

1. Still in early stages of launching new product and/or company with a very limited group of customers.

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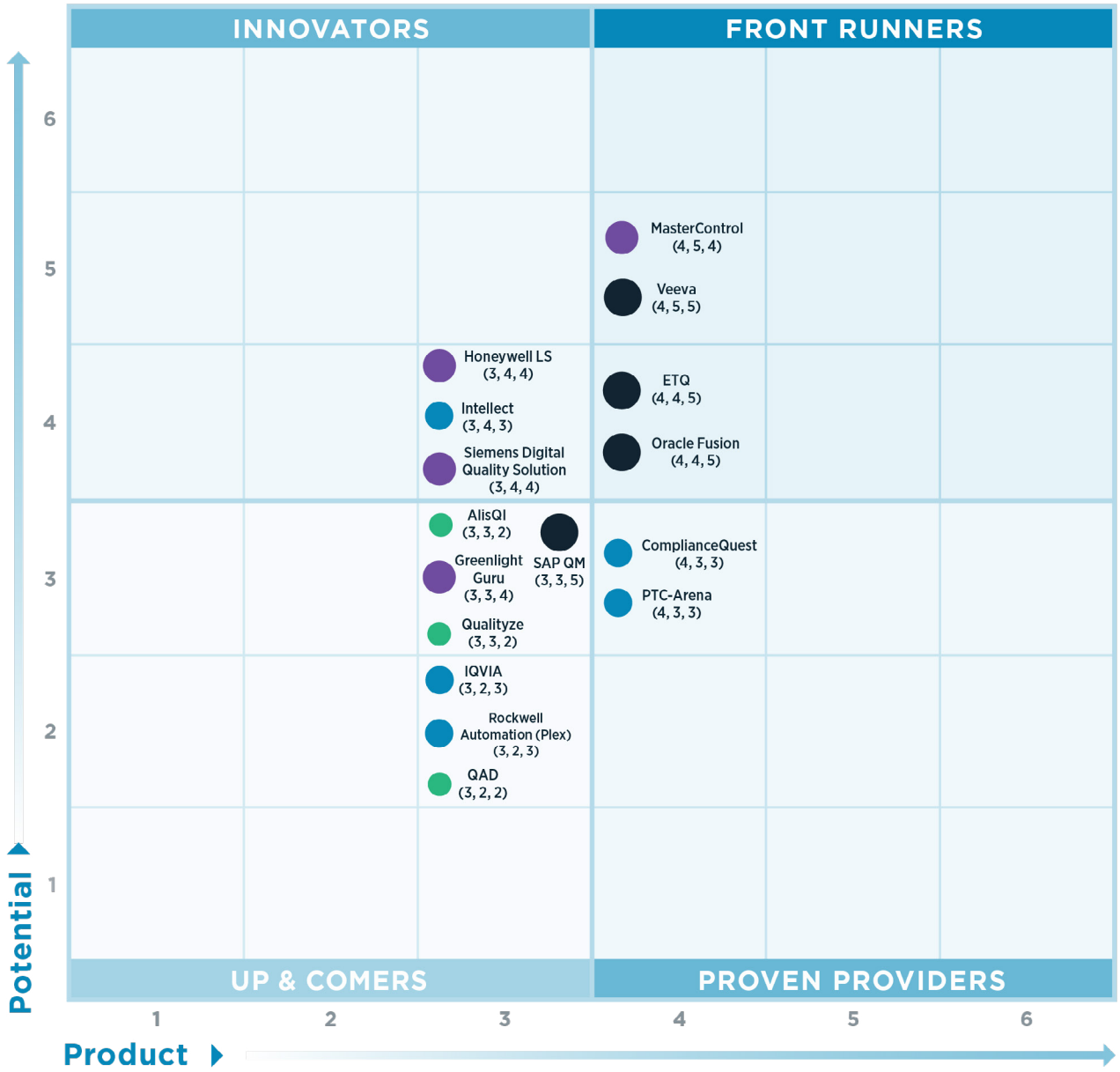
[3]Presence is measured by a vendor's capabilities to serve AND proven implementations. Vendors' capabilities to serve are measured by resources able to support a specific technology, not overall company capability.

[4]Middle East is a "major" geography for many process industries but not for discrete.

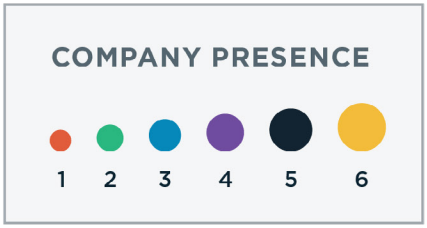
LNS Research EQMS Solution Selection Matrix (SSM)

EQMS Applications



3P COMPANY SCORE *(Product, Potential, Presence)*

AlisQI (3, 3, 2)
ComplianceQuest (4, 3, 3)
ETQ (4, 4, 5)
Greenlight Guru (3, 3, 4)
Honeywell LS (3, 4, 4)
Intellect (3, 4, 3)
IQVIA (3, 2, 3)
MasterControl (4, 5, 4)
Oracle Fusion (4, 4, 5)
PTC-Arena (4, 3, 3)
QAD (3, 2, 2)
Qualityze (3, 3, 2)
Rockwell Automation (Plex) (3, 2, 3)
SAP QM (3, 3, 5)
Siemens Digital Quality Solution (3, 4, 4)
Veeva (4, 5, 5)



The EQMS Solution Selection Matrix (SSM) visually represents the included vendors' relative position based on the application of the 3P Evaluation Model. The 3P evaluation scores are mapped into the SSM. The horizontal axis value is the Product score; the vertical axis value is the Potential score. The size of the bubble represents the Presence Score. The composite score reflects the potential for wide-scale enterprise deployment and value.

The EQMS SSM reflects our current view of the overall market landscape. It's a rapidly evolving market, as illustrated by the diversity of strengths among the vendors in the Front Runner category:

The individual vendor profiles, compiled in the corresponding EQMS SSM Vendor Compendium, provide detailed analysis and commentary on the 16 vendors included in this SSM.

Enterprise Quality Management Software (EQMS) Market Observations

Industrial companies should consider several market observations regarding EQMS as they consider these technologies in their Industrial Transformation (IX) programs. These observations reflect the dynamic nature of this software category.

- **Diversity of vendor commercial maturity.** While some acquisitions and new players have entered the EQMS market in the last few years, many of the vendors represented in this SSM have been focused on EQMS for several years now, some for more than a decade.
- **Wide range of solution approaches.** In addition to acquisition and consolidation, a handful of vendors in this SSM are hard at work building additional capabilities beyond the traditional compliance-focused, document and event-driven modality of the past.
- **Market consolidation/M&A activity.** The EQMS market has been quiet for the last couple of years from an M&A perspective. The last major acquisition was in early 2022. In the meantime, adoption has continued to grow across industry sectors. EQMS is now considered a "table stakes" industrial software application, with over 50% adoption or piloting solutions in most industry sectors.
- **EQMS is not "sticky".** EQMS is more prone to being ripped and replaced than many other industrial software systems. To the extent that an incumbent or shortlisted solution can enable easy "System of Systems" interoperability between the EQMS and other enterprise software systems, it will be harder to rip and replace.
- **Deep Industry Focus wins.** In this SSM and across other software categories, we see that those more focused on industry-specific go-to-market and implementation gain market share. Broad industry-wide players still exist, but are becoming rare.
- **Focus is shifting from use cases to personas.** The use case orientation is a thing of the past. Buyers expect to "see themselves" in your solution. This persona orientation requires vendors to "get in the head" of the buyer and see the day in the life of that buyer and their teams.

Today, there is no "one size fits all" solution, and the market continues to change at a brisk pace. There will also continue to be a place for specialist EQMS solution providers that find success with a well-honed combination of industry and use case focus.

Our research and point of view are intended to support manufacturers during the EQMS Application selection process. The detailed product evaluation provides functional capabilities and platform technology strengths within the individual vendor profiles. This EQMS Solution Selection Matrix (SSM) gives industrial organizations a better understanding of the technology space for assessing and adopting vendor solutions to enable the workforce digitally.

Bottom Line and Recommendations

When it comes to quality, industrial organizations are at a crossroads. Traditional quality organizations have focused on compliance, events, and documents. This has led, deservedly, to quality being labeled the compliance police. Quality leaders and teams have had great difficulty moving beyond the compliance mindset, so much so that in some industrial companies, corporate quality is being disbanded; in others, tried and true quality methods, such as inspection, are being minimized.

EQMS as a software solution has traditionally focused on the quality buyer, and as a result, many EQMS solutions are aligned with compliance. As the mandate of the quality organization is at risk of becoming less relevant, a new buyer for EQMS will need to be curated: the head of operations. Heads of operations care about compliance, but are more likely to see it as necessary but insufficient to achieve their quality goals.

For those heads of operations or quality who are considering an EQMS, here are some things to keep in mind:

1. **Don't confuse an EQMS initiative with a technology project.** Any EQMS initiative should be business-driven and integrated with overall IX efforts. EQMS is about supporting, engaging, and empowering consistent process execution, driving excellence in delivered quality. Technology, including EQMS, is a necessary but insufficient component of this transformation. A cross-organization effort, including Operations, HR, IT, and digital teams, is also needed.

2. **Start with the big picture of Industrial Transformation.** No amount of digital transformation and automation will eliminate the need for a capable and competent workforce. Step change transformation isn't possible without fully integrating people into operations; EQMS won't be successful as an isolated initiative.

3. **Focus on Customer-Experienced Quality.** No company has become great because of its well-written procedures or many quality certifications. What matters to companies in competition with one another is an advantage. Customer-experienced quality is still a primary path to competitive advantage.

4. **Strive for an enterprise EQMS solution.** EQMS can support a wide range of use cases throughout operations and across the value chain. The ideal solution addresses today's problems locally while having the flexibility to extend and scale across the global enterprise. Solution selection should consider the mid-to-long-range business and technology roadmaps. Implementation of multiple-point solutions is likely to become unwieldy and unscalable soon.

And finally, resist the temptation to take a DIY approach. Ask yourself, "What is our core competency? Are we in the software product development and support business?" Beware of sets of components and low-code/no-code platforms that are pitched as easy to develop and integrate, but whose initial costs are only the tip of the iceberg in terms of TCO, degree of difficulty, and time to value. You will be on the hook to add your time and domain knowledge, which means lots of handholding.

Most importantly, don't let the challenges around EQMS solution selection prevent you from embarking on or accelerating your transformation journey. Step change improvement is possible, and LNS Research is here to help you along that path.

Methodology References

This Solution Selection Matrix is based on the following research:

1. Definition of IX Platforms as outlined in IX Architectural Paths: Part Two of Three Evaluating IX Platforms and IX Analytics
2. This definition was based on the IX Reference Architecture outlined here: Research Spotlight: From the Industrial Internet of Things (IIoT) Platform to Industrial Transformation Reference Architecture
3. Update on IIoT Market Dynamics: Changing Dynamics of the IIoT Market
4. LNS Research Vendor Evaluation Process highlighted here: How LNS Research Evaluates Vendors in Technology Domains

Vendor Profiles are snapshots of a company's capabilities at a specific time based on the vendor's ability to deliver in this particular market, not its overall capabilities. Vendors regularly announce new product releases, roadmaps, acquisitions, partnerships, and updated strategies. LNS Research seeks to capture those announcements up to the time of publishing within the vendor's "Potential" score, as the actual impact on the market has not yet been realized.

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SOLUTION SELECTION MATRIX

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