

Process Orchestration – Technology Provider Landscape with Products PEAK Matrix® Assessment 2023

November 2022



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- ▶ Revenue Cycle Management
- ▶ Rewards and Recognition
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
- ▶ Supply Chain Management (SCM) Services
- ▶ Sustainability Technology and Services
- ▶ Talent Excellence GBS
- ▶ Talent Excellence ITS
- ▶ Technology Skills and Talent
- ▶ Trust and Safety
- ▶ Value and Quality Assurance (VQA)
- ▶ Work at Home Agent (WAHA) Customer Experience Management (CXM)

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Peer analysis

Market intelligence

Tracking: providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

Contents

For more information on this and other research published by Everest Group, please contact us:

Amardeep Modi, Vice President

Samikshya Meher, Practice Director

Santhosh Kumar, Senior Analyst

Jonty Padia, Senior Analyst

Varun Jain, Analyst

Pragya Sultania, Analyst

1. Introduction and overview	6
• Research methodology	7
• Background of the research	8
• Key information on the report	9
• Summary of key messages	10
2. Overview of process orchestration	11
• Intelligent Automation (IA) ecosystem	12
• Process orchestration definition	13
• Product components and capabilities	14
• Applications of process orchestration	15
3. Process orchestration PEAK Matrix® characteristics	16
• PEAK Matrix framework	17
• Everest Group PEAK Matrix for process orchestration	19
• Characteristics of Leaders, Major Contenders, and Aspirants	20
• Technology providers' capability summary dashboard	21
4. The process orchestration market – competitive landscape	25
• Summary	26
• Market share – by revenue	27
• Market share – by client	28
• Top process orchestration technology providers – by industry	29

Contents

• Top process orchestration technology providers – by geography	30
• Top process orchestration technology providers – by business function	31
• Top process orchestration technology providers – by buyer segment	32
5. Process orchestration technology trends	33
6. Enterprise sourcing considerations	38
• Leaders	38
– Appian	39
– Microsoft	41
– Pega	43
• Major Contenders	45
– AgilePoint	46
– AuraQuantic	48
– Camunda	50
– Enate	52
– EvolutelQ	54
– FireStart	56
– GBTEC	58
– Kofax	60
– Nintex	62
– PMG	64

Contents

– SS&C Blue Prism	66
– Ultimus	68
• Aspirants	70
– Bonitasoft	71
– JobRouter	73
– Kissflow	75
7. Appendix	77
• Glossary	78
• Research calendar	80

01

Introduction and overview

- Research methodology

- Background of the research

- Key information on the report

- Summary of key messages

Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

01

Robust definitions and frameworks

Function-specific pyramid, Total Value Equation (TVE), PEAK Matrix®, and market maturity

02

Primary sources of information

Annual contractual and operational RFIs, provider briefings and buyer interviews, web-based surveys

03

Diverse set of market touchpoints

Ongoing interactions across key stakeholders, input from a mix of perspectives and interests, supports both data analysis and thought leadership

04

Fact-based research

Data-driven analysis with expert perspectives, trend-analysis across market adoption, contracting, and providers

Proprietary database on process orchestration capabilities of 17+ technology providers

Year-round tracking of 17+ process orchestration providers

Large repository of existing research in process orchestration

Over 30 years of experience advising clients on strategic IT, business services, engineering services, and sourcing

Executive-level relationships with buyers, providers, technology providers, and industry associations

Background of the research

Everest Group defines Process Orchestration (PO) as software that helps enterprise users design, manage, and monitor end-to-end business processes. It includes key capabilities such as process modeling, business rules management, the ability to design user interfaces for capturing/presenting data, hybrid (human + digital) workforce management, and the ability to provide process-related insights. It should be able to orchestrate the flow of work across human workers, digital workers (such as RPA, IDP, and conversational AI), and enterprise applications in long-running workflows.

For the scope of this study, we cover products in the market that are low-code/no-code and broad-based business process-centric products (not focused on a particular use case / function / industry) and are available for independent licensing. The product should also be capable of handling workflows that may not involve digital workers.

In this research, we present an assessment of 18 technology providers featured on the process orchestration products PEAK Matrix®. The assessment is based on Everest Group's annual RFI process for the calendar year 2022, interactions with leading technology providers, client reference checks, and ongoing analysis of the process orchestration software market.

In this study, we analyze the process orchestration technology landscape across various dimensions:

- Everest Group's PEAK Matrix® evaluation, a comparative assessment of 18 leading process orchestration technology providers
- Competitive landscape in the process orchestration technology provider market
- Key process orchestration technology trends
- Remarks on key strengths and limitations for each process orchestration technology provider

Scope of this report



Geography
Global



Providers
18 leading process
orchestration technology
providers



Product
Process orchestration

This research is based on multiple sources of proprietary information

Proprietary database of 18 process orchestration technology providers

- The database tracks the following elements of each contract:
 - Process design and business rules management
 - Low-code/No-code user interface, hybrid workforce management
 - Monitoring & analytics, interoperability
 - Partnerships with service providers and other technology providers
 - Deployment and hosting options
 - Product-related training and support services
 - Availability and adoption of commercial model(s)
 - IT governance and security

Proprietary operational information database of technology providers (updated annually)

- The database tracks the following for each provider:
 - Revenue and number of FTEs
 - Number of clients
 - FTE split by different lines of business
 - Portfolio coverage in terms of industry, geography, process areas, and buyer size

Demonstrations and interactions with technology providers and other industry stakeholders

- Detailed demonstrations for a comprehensive product view and executive-level discussions with process orchestration providers that cover:
 - Current state of the market
 - Vision and strategy
 - Opportunities and challenges
 - Emerging areas of investment
 - Annual performance and future outlook

Buyer reference interviews, ongoing buyer surveys, and interactions

- Interviews with technology providers' reference clients and enterprise process orchestration buyers to get the buyer perspective around:
 - Drivers and objectives for adopting process orchestration
 - Apprehensions and challenges
 - Assessment of providers' performance
 - Emerging priorities / buying criteria
 - Outcomes achieved
 - Lessons learned and best practices adopted

Providers assessed¹



¹ Assessment for Bonitasoft, Microsoft, and Pega excludes detailed provider inputs for this particular study and is based on Everest Group's estimates that leverage Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of these technology providers, their public disclosures, and interaction with buyers. For these companies, Everest Group's data for assessment may not be complete

The source of all content is Everest Group unless otherwise specified

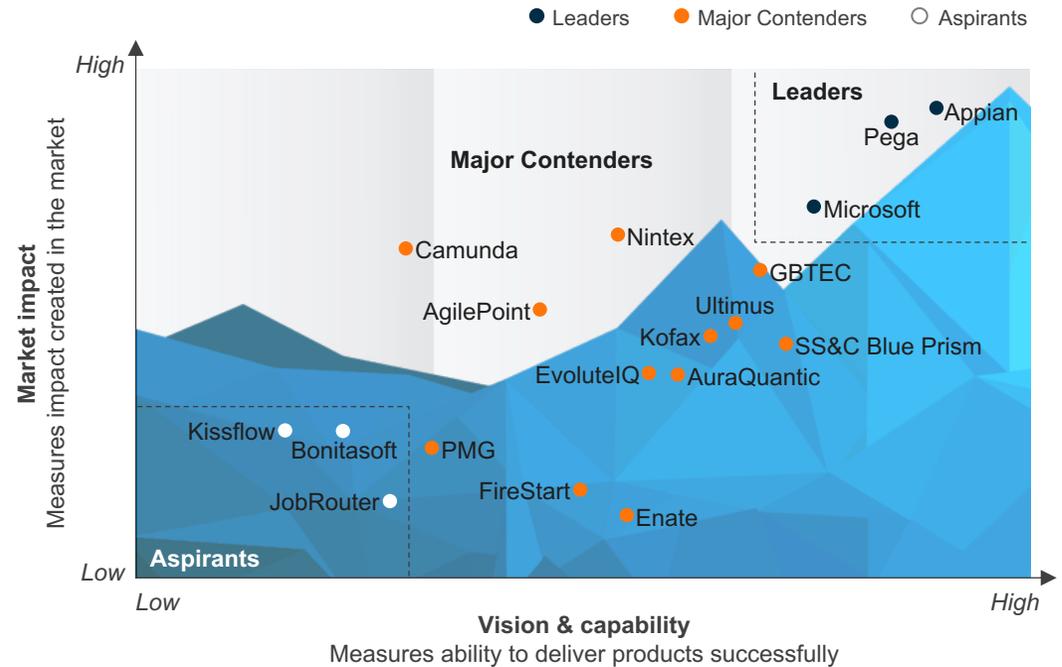
Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any information we collect that is contract specific will only be presented back to the industry in an aggregated fashion



Summary of key messages

- Everest Group classifies process orchestration technology providers on the Everest Group Products PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants:
 - **Leaders:** Appian, Microsoft, and Pega
 - **Major Contenders:** AgilePoint, AuraQuantic, Camunda, Enate, EvoluteIQ, FireStart, GBTEC, Kofax, Nintex, PMG, SS&C Blue Prism, and Ultimus
 - **Aspirants:** Bonitasoft, JobRouter, and Kissflow
- Appian and Pega are the top providers in terms of process orchestration software revenue, followed by Kofax, Microsoft, and Nintex

Everest Group Process Orchestration Products PEAK Matrix® Assessment 2022¹



¹ Assessment for Bonitasoft, Microsoft, and Pega excludes detailed provider inputs on this particular study and is based on Everest Group’s estimates that leverage Everest Group’s proprietary Transaction Intelligence (TI) database, ongoing coverage of these technology providers, their public disclosures, and interaction with buyers. For these companies, Everest Group’s data for assessment may not be complete

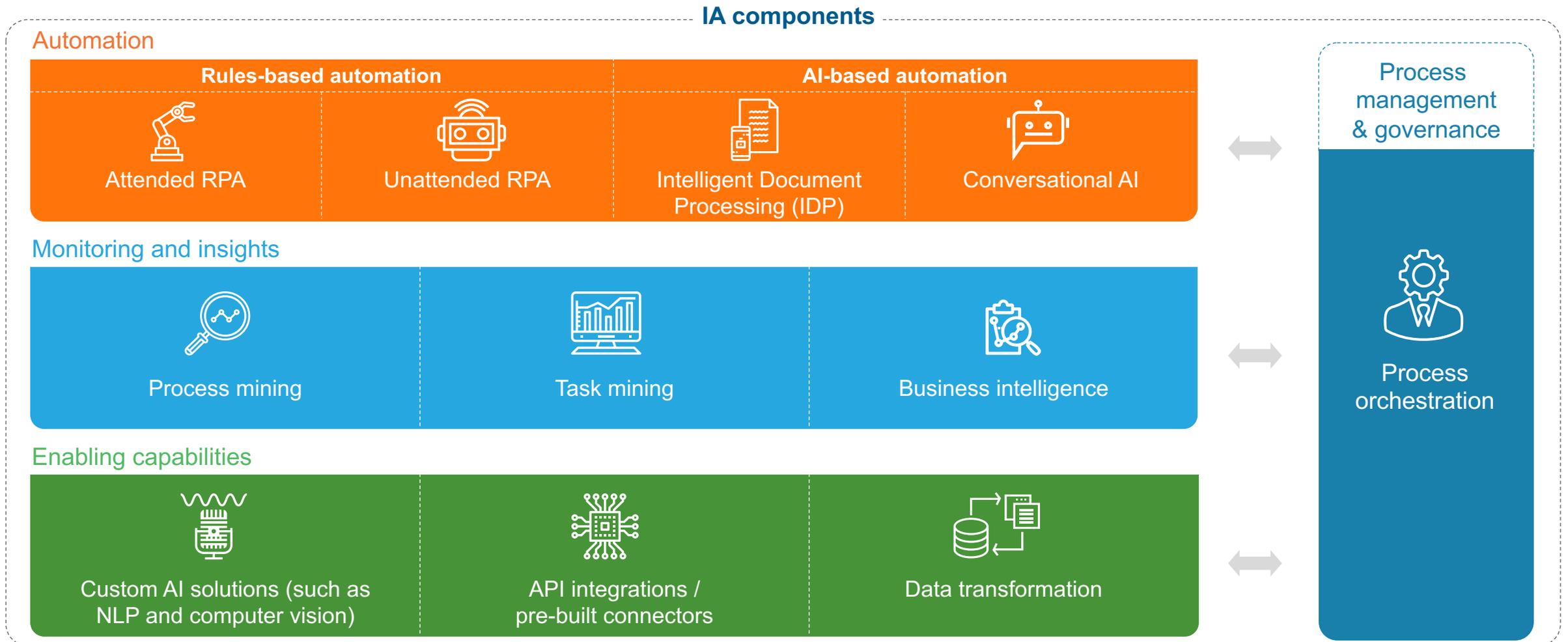
Source: Everest Group (2022)

02

Overview of process orchestration

- Intelligent Automation (IA) ecosystem
- Process orchestration definition
- Product components and capabilities
- Applications of process orchestration

As enterprises focus on process automation, process management and governance become key aspects to enable transformation – rendering process orchestration as a key component in the intelligent automation ecosystem



A holistic process orchestration software comprises various components that help enterprises manage and govern end-to-end business processes

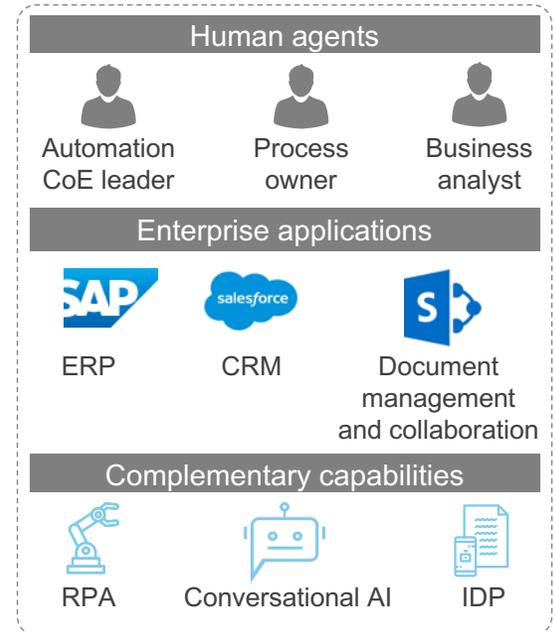
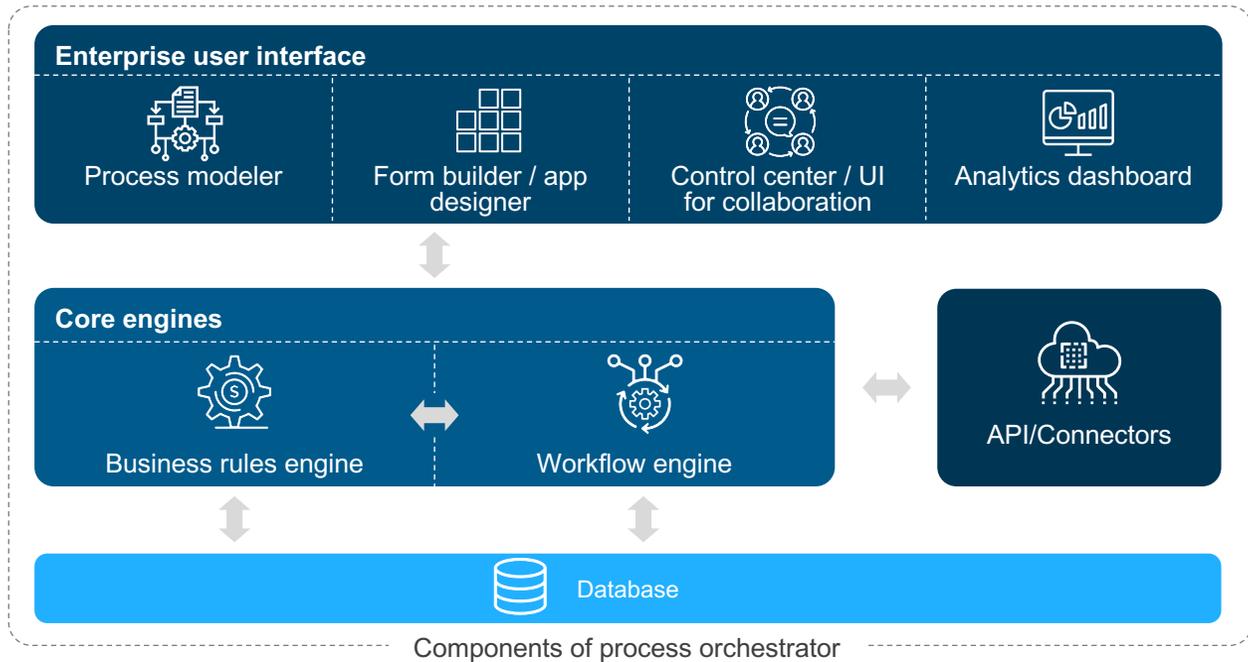


Enterprise process orchestration is a software that helps design, execute, and monitor end-to-end business processes. It includes key capabilities such as process modeling, business rules management, the ability to design user interfaces for capturing/presenting data, hybrid (human + digital) workforce management, and the ability to provide process-related insights. It should be able to orchestrate the flow of work across human workers, digital workers (such as RPA, IDP, and conversational AI), and enterprise applications in long-running workflows.

Key components of a process orchestration solution



Process discovery & analysis



The underlying components enable four key capabilities – process design and execution, business rules and decision management, low-code/no-code UI development, and hybrid workforce management

Product capabilities 	Process design and execution 	Business rules and decision management 	Low-code/no-code user interface development 	Hybrid workforce management 
Description	This provides users the ability to design business processes, document process maps, and execute processes. It also allows users to define scenarios and run process simulations to aid with business decisions.	This enables users to configure and execute business rules within the process and discover existing business rules in the business processes.	This allows users to create static as well as dynamic forms and create process-centric applications to automate workflows. The form builder also has a centralized repository of standard reusable form templates for common use cases.	This helps in assigning tasks to resources, handling any kind of exceptions, and optimizing the workload between human and digital workforce. Users can configure alerts and notifications for any exceptions.
Underlying components	<ul style="list-style-type: none">  Process modeler  Workflow engine  Database  Analytics dashboard 	<ul style="list-style-type: none">  Business rules engine  Database 	<ul style="list-style-type: none">  Form builder / App designer  Database 	<ul style="list-style-type: none">  Control center / UI for collaboration  APIs/Connectors  Analytics dashboard

Enterprises are adopting process orchestration solutions for several applications including process standardization, workflow automation, and process optimization



Process standardization

- Allows to model, document, and easily make changes to business process design across resources, helping businesses to follow one unified system for process execution
- Gives users a unified view of the end-to-end process, enabling business users to harmonize processes across functions and business lines



Hybrid workforce management

- Helps manage handoffs between the human and digital workforce and enables them to work together harmoniously
- Provides automatic workload balancing for work allocation to resources while also enabling human agents to allocate tasks, start and schedule robots and workflows, and manage exceptions and errors as necessary
- Enables tracking and real-time monitoring of the hybrid workforce and automated processes to drive performance and utilization



Workflow automation

- Reduces dependence on manual processing as it executes defined workflows across multiple interconnected processes and communicates with different system applications when the specified conditions are met
- Helps manage human + machine dynamics by allocating tasks to the right worker (digital or human) at the right time



Process optimization

- Provides complete visibility into the business processes running across the organization, and thus, helps identify and eliminate redundancies in processes
- Highlights various process parameters including resource utilization and bottlenecks impacting process performance, and, thereby, helps take the right decisions to improve business processes
- Provides visibility of the processes and resources deployed across the enterprise, which in turn facilitates the reuse of templates and better utilization of digital workers



Governance and compliance

- Allows to define, assign, and manage business policies during process design, thereby ensuring adherence to regulatory compliance during execution
- Provides audit trails and reporting capabilities, enabling organizations to meet compliance requirements



03

Process orchestration PEAK Matrix® characteristics

- PEAK Matrix framework

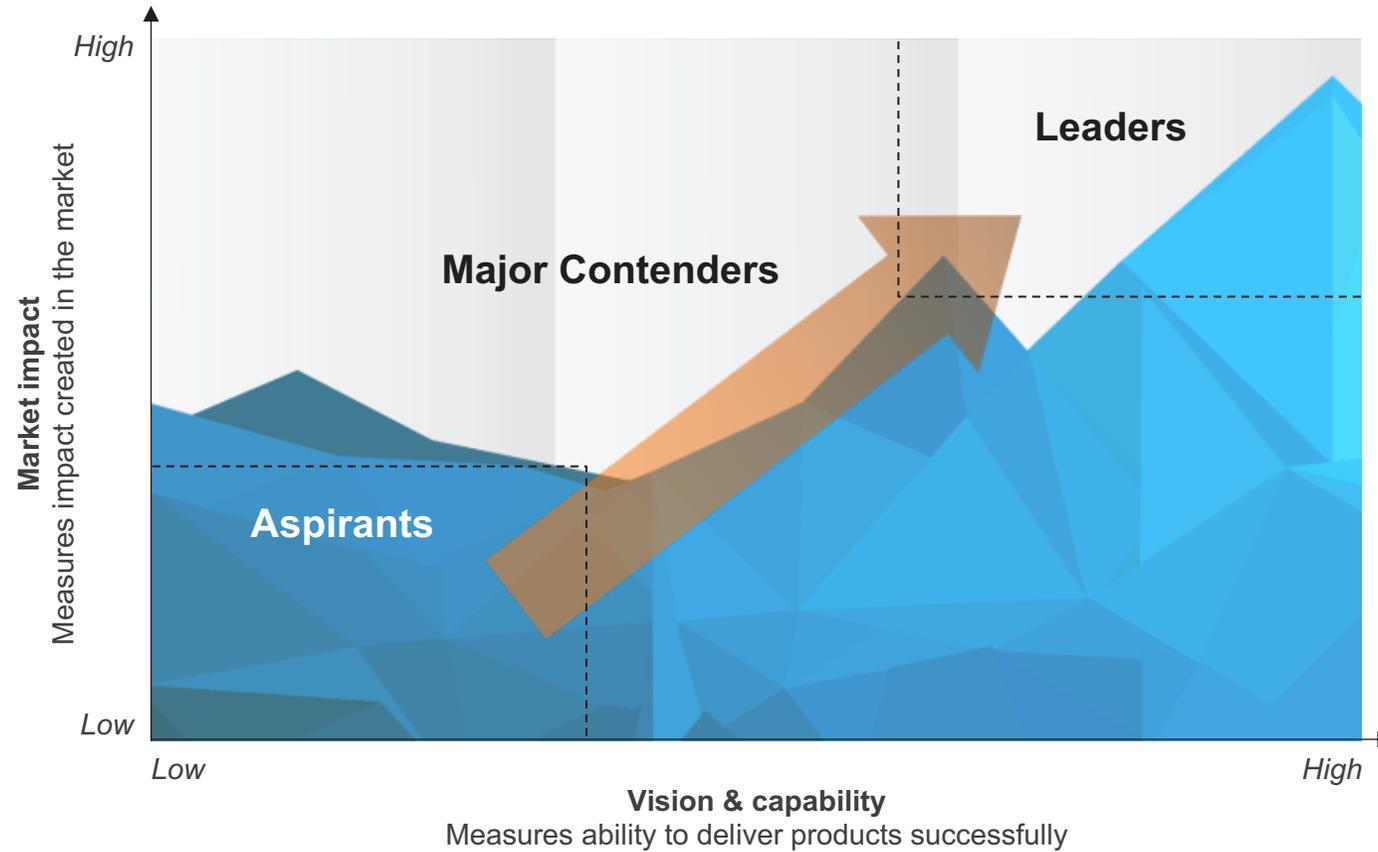
- Everest Group PEAK Matrix for process orchestration

- Characteristics of Leaders, Major Contenders, and Aspirants

- Technology providers' capability summary dashboard

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability

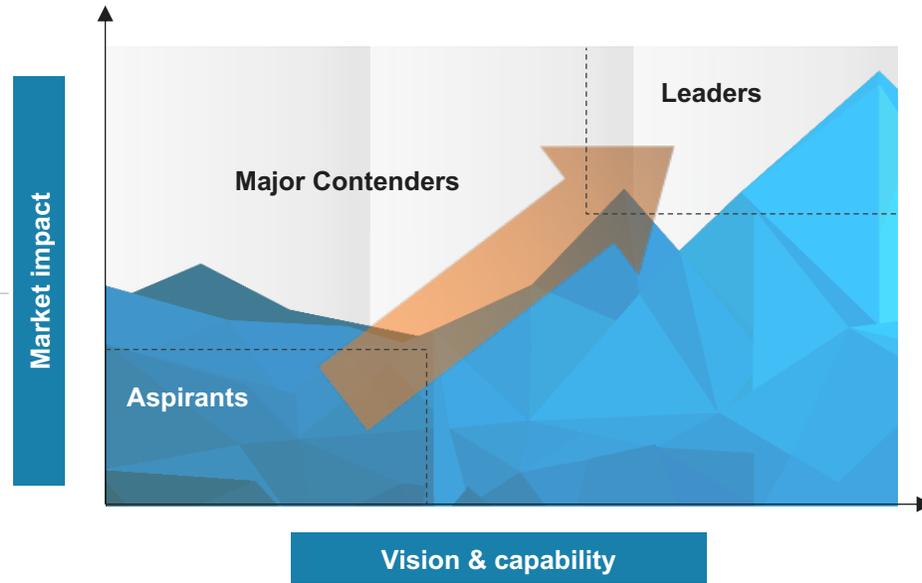
Everest Group PEAK Matrix



Process Orchestration Products PEAK Matrix® evaluation dimensions

Measures the impact created in the market – captured through three subdimensions

Market adoption
Number of clients, revenue base, and YoY growth
Portfolio mix
Diversity of client base across industries, geographies, processes / use cases, and enterprise-size class
Value delivered
Value delivered to the clients and their satisfaction with the product as well as the support, based on client feedback



Measures the ability to deliver products successfully. This is captured through five subdimensions

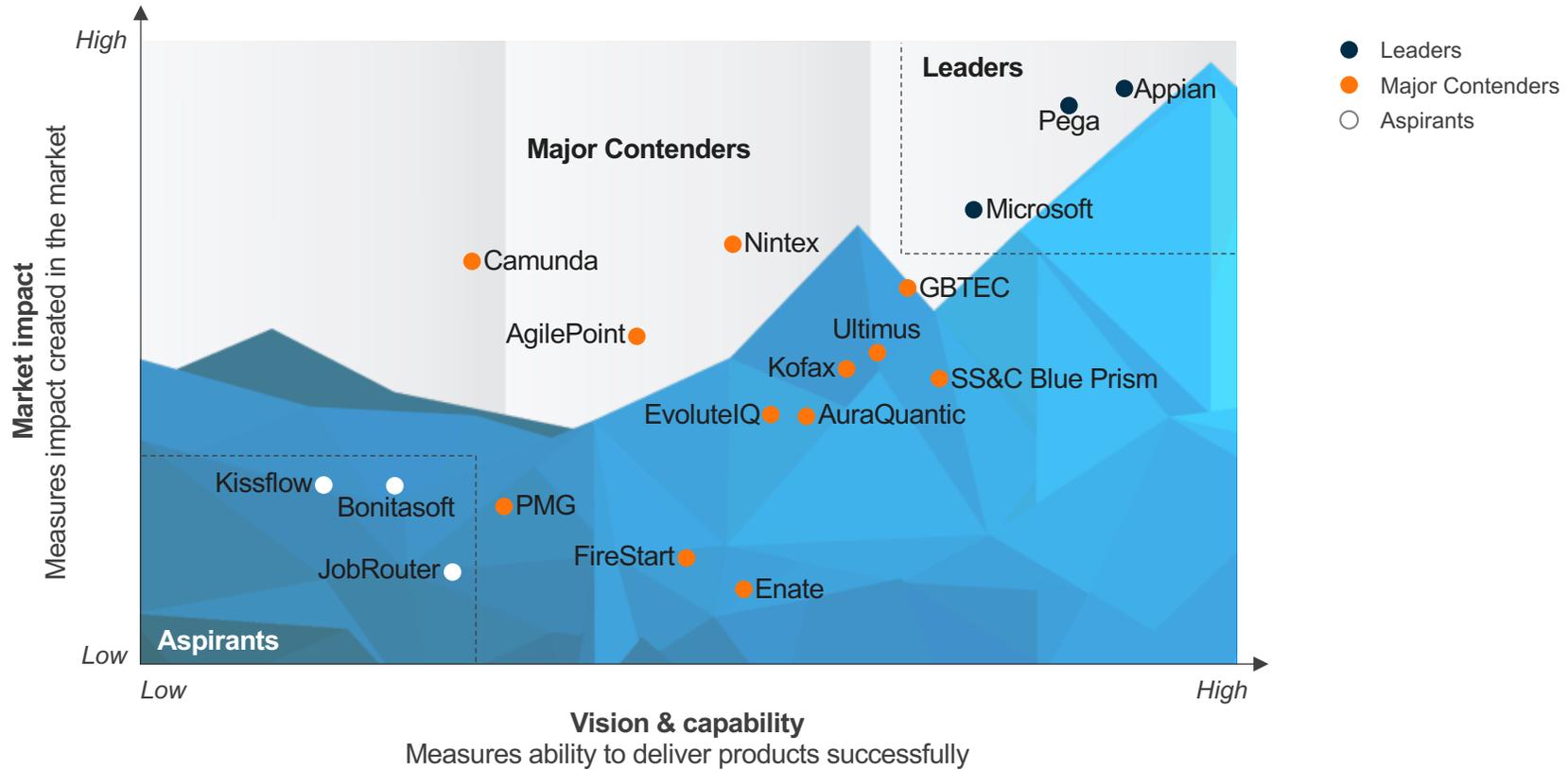
Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model
Vision for the client and itself; key investments, future roadmap, and strategy	Process design, business rules management, low-code/no-code user interface development, process monitoring, and analytics	Hybrid workforce management, workforce analytics, and complementary technologies	Product training & support, partnerships with service providers, ease of use, product architecture, hosting options, and data security	Flexibility, progressiveness, and client adoption of the available commercial models



Everest Group PEAK Matrix®

Process Orchestration Products PEAK Matrix® Assessment 2022

Everest Group Process Orchestration Products PEAK Matrix® Assessment 2022¹



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 Source: Everest Group (2022)

Process Orchestration Products PEAK Matrix® characteristics

Leaders:

Appian, Microsoft, and Pega

- Leaders have a strong vision to enable end-to-end process design and management through a low-code/no-code visual interface. They have a high focus on democratizing the usage of process orchestration software by business users / analysts and managers with minimal reliance on enterprise IT
- Leaders have experienced a decent growth momentum in the process orchestration market, driven by both acquisitions of new clients and scaling of the existing deployments in enterprises. They are aiming to explore the untapped market opportunities through partner sales channels by expanding their service provider partner ecosystem
- Leaders continue to focus on offering an extensive set of reusable assets (forms, process templates, applications, etc.) and providing a comprehensive set of capabilities to customize as per user requirements to support a wide variety of use cases

Major Contenders:

AgilePoint, AuraQuantic, Camunda, Enate, EvoluteIQ, FireStart, GBTEC, Kofax, Nintex, PMG, SS&C Blue Prism, and Ultimus

- Major Contenders are expanding their presence across industries, geographies, and buyer size segments. Some regional players are playing to their strengths and looking to enter new geographies with an aim to expand into industries where they have domain expertise and a library of pre-built forms and applications
- A few Major Contenders are differentiating themselves by investing in low-code/no-code application development capabilities for citizen development and AI/ML capabilities to enhance the predictive and prescriptive analytics for workforce management
- Following the Leaders, most Major Contenders are also investing to offer a holistic intelligent automation platform including RPA, IDP, process mining, and task mining, either through in-house investments or partnerships. Some of them are also building more pre-built automation assets that combine these various technologies and can be used as out-of-the-box solutions

Aspirants:

Bonitasoft, JobRouter, and Kissflow

- Aspirants are playing to their strengths and serving client needs in specific geographies, industries, or buyer size segments and catering to use cases in specific process areas or business functions
- Their major focus areas include making the platform easy to use for customers, forging partnerships with service providers and system integrators to increase their reach and offer better support, and enhancing some of the core product functionalities such as business rules management, low-code/no-code user interface development, and hybrid workforce management

Summary dashboard | market impact and vision & capability assessment of providers for process orchestration products 2022

Leaders

Measure of capability:  Low  High

Providers	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
Appian										
Microsoft										
Pega										

Note: The Value Delivered score and overall PEAK Matrix positioning have been impacted for providers that provided an insufficient number of client references.

Summary dashboard | market impact and vision & capability assessment of providers for process orchestration products 2022

Major Contenders (page 1 of 2)

Measure of capability:  Low  High

Providers	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
AgilePoint										
AuraQuantic										
Camunda										
Enate										
EvoluteIQ										
FireStart										
GBTEC										
Kofax										
Nintex										

Note: The Value Delivered score and overall PEAK Matrix positioning have been impacted for providers that provided an insufficient number of client references.

Summary dashboard | market impact and vision & capability assessment of providers for process orchestration products 2022

Major Contenders (page 2 of 2)

Measure of capability:  Low  High

Providers	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
PMG										
SS&C Blue Prism										
Ultimus										

Note: The Value Delivered score and overall PEAK Matrix positioning have been impacted for providers that provided an insufficient number of client references.

Summary dashboard | market impact and vision & capability assessment of providers for process orchestration products 2022

Aspirants

Measure of capability:  Low  High

Providers	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
Bonitasoft										
JobRouter										
Kissflow										

Note: The Value Delivered score and overall PEAK Matrix positioning have been impacted for providers that provided an insufficient number of client references.

04

The process orchestration market – competitive landscape

- Summary

- Market share – by revenue

- Market share – by client

- Top process orchestration technology providers – by industry

- Top process orchestration technology providers – by geography

- Top process orchestration technology providers – by business function

- Top process orchestration technology providers – by buyer segment

The process orchestration market competitive landscape – summary



- Appian, Nintex, and Pega are the top providers in terms of process orchestration license revenue. EvoluteIQ, Camunda, FireStart, and Kissflow have experienced more than 40% YoY growth in the market
- AgilePoint, Microsoft, and Nintex are the leaders in terms of the number of process orchestration clients. EvoluteIQ, Enate, and Kissflow have achieved over 50% YoY growth in the number of clients
- Appian and Nintex are among the leading providers across all the key verticals, while Microsoft and Pega are the other providers with high market share across industries
- North America has the highest process orchestration adoption, followed by Continental Europe. Appian and Pega have a strong presence across all geographies. Nintex and Microsoft are other dominant providers across major geographies
- Among business functions or process areas, the highest market share comes from the contact center, followed by BFSI industry-specific processes. Pega, Appian, and Nintex are the leading players across different business functions
- Pega has the highest share of the revenue from clients across large and midsize buyer segments. Nintex has the largest share across other enterprise buyer segments such as small buyers and SMBs

Note: Some assessments may exclude technology providers' inputs, and are therefore based on Everest Group estimates, which leverage our proprietary process orchestration technology providers' database, providers' ongoing coverage, public disclosures, and interaction with buyers

Source: Everest Group (2022)

Appian, Nintex, and Pega are the top providers in terms of process orchestration software revenue; EvoluteIQ has achieved over 100% YoY growth

Providers' process orchestration software market share by revenue
(Providers are listed in alphabetical order within each category)

>10%						
5-10%						
1-4%						
<1%						 

Providers' YoY growth in process orchestration software revenue
(Providers are listed in alphabetical order within each category)

>100%						
41-100%						
11-40%						 
<10%						 

Source: Everest Group (2022)

AgilePoint, Microsoft, and Nintex are the top providers by the number of clients; EvoluteIQ, Enate, and Kissflow achieved over 50% YoY growth in their client base

Providers by number of process orchestration clients
(Providers are listed in alphabetical order within each category)

>500	agilepoint.	appian	JobRouter	KOFAX	Microsoft	nintex	PEGA	ULTIMUS COMPOSED PROCESS SOLUTIONS
101-500	aura quantic	Bonitasoft	CAMUNDA	FireStart	TEC	kissflow	pmg	ss&c blueprism
<100	enate	evoluteiq Absolute.Automation						

Providers' YoY growth in the number of process orchestration clients
(Providers are listed in alphabetical order within each category)

>100%	evoluteiq Absolute.Automation							
50-100%	enate	kissflow						
<50%	agilepoint.	appian	aura quantic	Bonitasoft	CAMUNDA	FireStart	TEC	JobRouter
	KOFAX	Microsoft	nintex	PEGA	pmg	ss&c blueprism	ULTIMUS COMPOSED PROCESS SOLUTIONS	

Source: Everest Group (2022)

Appian and Nintex are among the leading providers across all the key verticals, while Microsoft and Pega are the other providers with high market share across industries

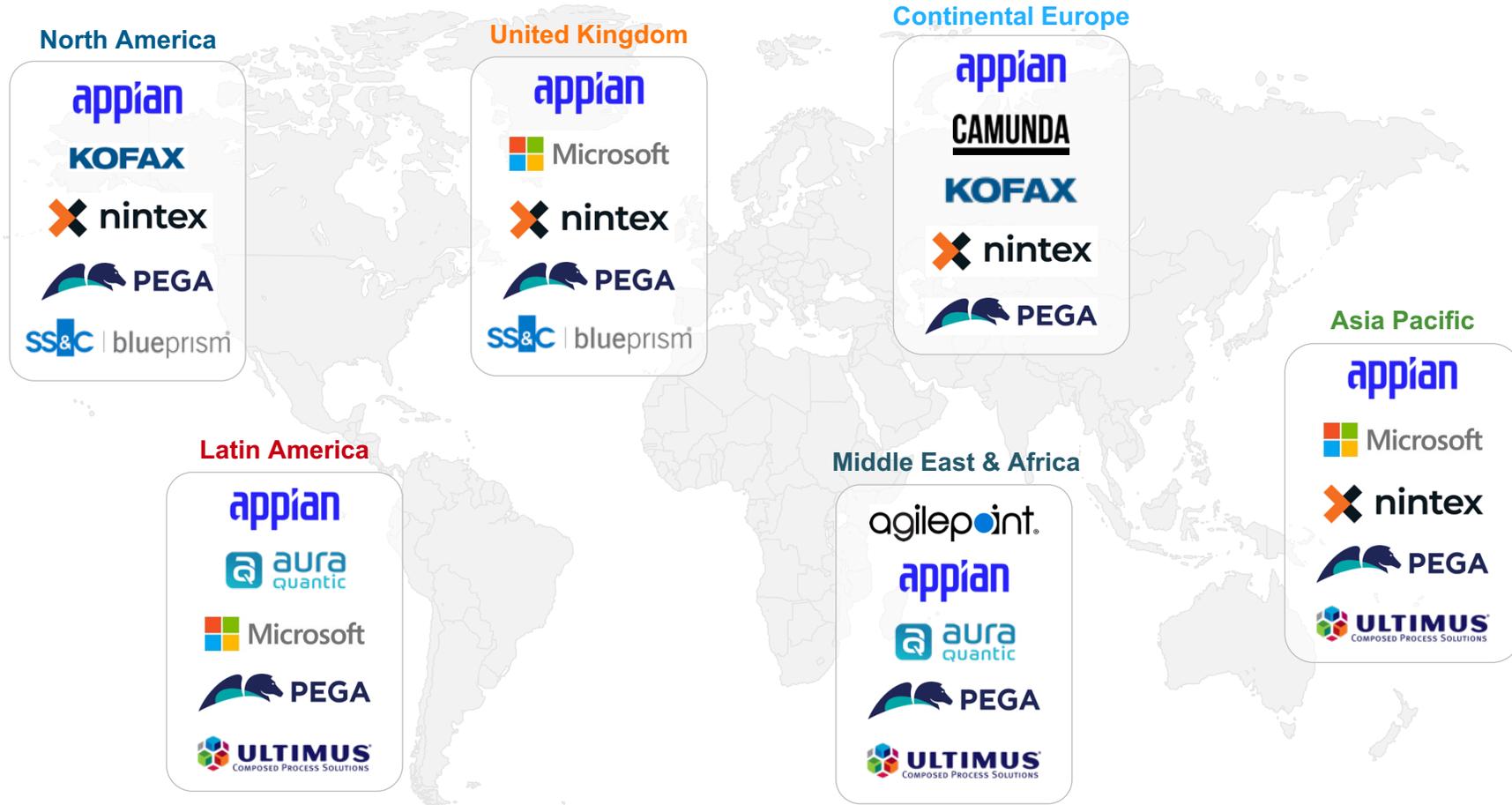
Providers with the largest share of process orchestration software revenue in the top six industry verticals
 Top five providers with respect to process orchestration software revenue (arranged alphabetically)



Source: Everest Group (2022)

Appian and Pega have a strong presence across all geographies; Nintex and Microsoft are other dominant providers across major geographies

Providers' share of process orchestration software revenue in major geographies
Top five providers with respect to process orchestration software revenue (arranged alphabetically)



Source: Everest Group (2022)

Pega, Appian, and Nintex are the leading players across different business functions, followed by Microsoft and Kofax

Providers with the largest share of process orchestration software revenue in the top six industry verticals
 Top five providers with respect to process orchestration software revenue (arranged alphabetically)



Source: Everest Group (2022)

Pega has the highest share of revenue from clients across large and midsize buyer segments; Nintex has the largest share across small buyers and SMBs

Providers with the largest share of process orchestration software revenue across buyer segments¹
 Top five providers with respect to process orchestration software revenue (arranged alphabetically)

Large buyers	Midsize buyers	Small buyers	SMBs
			
			
			
			
			

¹ Buyer size is defined as large (>US\$5 billion in revenue), midsize (US\$1-5 billion in revenue), small (US\$50 million-1 billion in revenue), and SMBs (<US\$50 million in revenue)
 Source: Everest Group (2022)

05

Process orchestration technology trends

Process orchestration technology continues to evolve with a host of new and native capabilities and enhancements to help enterprises achieve greater business value



Process design and execution

- Process modeling (dynamic process design)
- Process simulation
- Process documentation



Hybrid workforce management

- Task assignment / Allocation to resources
- Exception handling
- Workload optimization/balancing
- Alerts and notifications



Business rules and decision management

- Business rules configuration
- Pre-built repository of business rules
- Business rules discovery



Monitoring and analytics

- Process analytics
- Workforce analytics
- Automation recommendations



Low-code/no-code user interface development

- Forms creation
- Pre-built form templates
- Business application development



Others

- Integrations with other applications
- Security and compliance
- Database for storage

Process orchestration technology trends (page 1 of 3)

Process design and execution



Process modeling (dynamic process design)

Process modeling refers to the ability to design business processes using simple drag-and-drop interfaces and documenting these process maps. This enables enterprises to add new process steps or change the existing process steps on a real-time basis. This also allows enterprises to track changes made by business users and to record tags and annotations to specific process steps for better collaboration.



Process simulation

This refers to the inbuilt capability in the platform to define scenarios and run process simulations to aid business decisions. The most common simulation analysis approach involves configuring 'what-if' scenarios by defining certain attributes/metrics (e.g., number of FTEs, number of RPA robots, and throughput time) to examine the impact on potential cost and time savings.



Process documentation

This refers to the inbuilt capability to generate process-based manuals or documents for training, certifications, and audits. These documents also capture the tags, comments, notes, and description, which are added by the users during the process design/modeling stage.

Business rules and decision management



Business rules configuration

This refers to the ability to add custom business rules within the process either through a drag-and-drop interface or through custom scripting. This allows users to configure complex business rules through simple conditional logic, mathematical expressions, decision trees, and decision tables.



Pre-built repository of business rules

Process orchestration providers offer a library of pre-built business rules to enterprises for the easy creation of business rules for different processes. They offer an advanced set of business rules for specific processes such as invoice processing, accounts payable, claims processing, and employee onboarding. They also provide flexibility to users for modifying and using these pre-built rules within the process.



Business rules discovery

This refers to the inbuilt capability of the platform to leverage AI/ML algorithms to discover existing business rules in the process. Users can search based on tags, descriptions, properties, and values of a business rule or by searching for a business rule task that is associated with a particular rule. This helps in the modification and reusability of business rules.

Process orchestration technology trends (page 2 of 3)

Low-code/no-code user interface development



Forms creation

Process orchestration providers offer a simple drag-and-drop interface with various controls such as buttons, text boxes, and dropdown menus to create digital forms and map out fully functioning workflows. They also provide a centralized repository for the users to visualize all the created forms and templates.



Pre-built form templates

Some process orchestration providers offer standard reusable form templates for industry-/function-specific processes such as request management, client onboarding, project management, IT helpdesk, employee onboarding, accounts payable, logistics document processing, claims settlement, and dispute management. Enterprises can leverage these templates to design forms in a simple way with industry best practices.



Business application development

This refers to the inbuilt capability of the platform that provides users the ability to create process-centric applications using a drag-and-drop visual interface. Some providers offer out-of-the-box pre-built modules/UIs for customer-facing applications such as order management and sales process management along with an app store / repository for collaboration and reuse of applications developed by business users.

Hybrid workforce management



Task assignment to resources

Process orchestration providers provide the ability to assign tasks to individual users and user groups in real time. This also includes integrating with RPA tools to assign tasks to robots based on availability and sending push notifications to notify the user about pending tasks.



Exception handling

This refers to the inbuilt capability of the platform to allow users to define rules for workflow exceptions and can automatically route exceptions to users with a default handler for each process. Users can also configure alerts or notifications for workflow exceptions so that they can be notified when such exceptions arise in the process.



Workload optimization/balancing

This refers to the inbuilt capability of the platform to manage and optimize the workload across human and digital workers. Process orchestration providers leverage different techniques for balancing the workload including round-robin allocation, work allocation based on user availability, periodic allocation, and AI-based task allocation.



Alerts and notifications

This refers to the inbuilt capability of the platform to alert/notify users when a task is still pending or when certain SLA thresholds are breached. Triggers and alerts can also be configured by users for certain use cases such as cost-related violations, durations for completion of process or activity, deadline violations for specific milestones, and any impending escalations.

Process orchestration technology trends (page 3 of 3)

Monitoring and analytics



Process analytics

Process analytics refers to monitoring the progress of processes and cases in near real-time against defined KPIs or metrics and detecting bottlenecks in the process. Providers offer customizable dashboards to track different process performance metrics such as process Turnaround Time (TAT), Average Handling Time (AHT), process productivity, process cost, error rates, defects, and rework rate.



Workforce analytics

This provides all the productivity and utilization metrics for human and digital workforce along with insights on top performers, top teams, and underutilized resources. These also offer intuitive metrics for monitoring the efforts of IT developers, infrastructure administrators, users, and the digital workforce.



Automation recommendations

This refers to the inbuilt ability of the platform to recommend automation opportunities within a process and provide insights around the impact of automation on defined KPIs and business metrics. Providers not only provide automation potential for the process steps but are also partnering with RPA providers to provide support for these automation use cases.

Others



Integrations with other applications

Process orchestration solutions come with integration capabilities to connect with various enterprise applications (ERP, CRM, HRMS, etc.) as well as other complementary capabilities (RPA, IDP, conversational AI, process mining, etc.). Some providers offer pre-built connectors to commonly used enterprise applications for seamless integration, while most providers support API integrations to enable data exchange with other applications.



Security and compliance

Security control and management features offered include centralized end-user authentication through SAML 2.0, OAuth 2.0, role-based access control, encryption of data at rest, and data in transit. These solutions also generate detailed audit logs for audit and compliance purposes.



Database for storage

A database is leveraged to store and organize process models, templates, documents, and other reusable assets developed on the platform. While some providers have native databases, many providers leverage one or multiple third-party systems such as Microsoft SQL, Oracle, and MongoDB for storing and retrieving data. A few providers also create and maintain a Single Source of Truth (SSOT) for data items.

06

Enterprise sourcing considerations

- Leaders
 - Appian
 - Microsoft
 - Pega

Appian (page 1 of 2)

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Strengths

- Appian is a low-code workflow and automation platform, which envisions enabling clients to build enterprise applications and workflows to maximize resource utilization and improve business performance. It continues to invest in driving market awareness and establishing thought leadership through workshops, enterprise case studies, and whitepapers
- Appian’s Process Modeler provides a low-code/no-code, drag-and-drop design environment allowing enterprise users to map process flows and logic. It comes with an extensible library of 100+ actions that allow users to handle varied process patterns. Clients have also highlighted process design and execution as one of its key strengths
- It supports different types of rule models such as expression rules, decision tables, and decision trees to help users with faster configurations and supports Decision Model and Notation (DMN) format for decision rules
- Its Interface Designer, a low-code/no-code, drag-and-drop designer, enables users to create dynamic web and mobile UIs. It offers over 100 pre-built interface patterns or UX designs for common requirements and also allows users to customize these patterns
- It provides a drag-and-drop visual interface for application development and also supports application development lifecycle management to enable collaboration among developers. Appian offers real-time debugging features in development without the need to compile before testing
- It offers a library of pre-built applications and reusable components through the Appian AppMarket, thus, reducing the development time for common processes. Appian provides a write-once, run-anywhere architecture with an inbuilt responsive design for desktop, tablet, and mobile devices
- The Appian Control Center provides a configurable out-of-the-box framework for centralized management, orchestration, exception handling, and monitoring of Appian RPA and other third-party RPA robots as well as workflows for human workers. Appian also allows prescriptive or predictive business rules to drive the execution of robotic processes
- It provides out-of-the-box dashboards for process monitoring and insights along with the option to export these dashboards in Microsoft Word or PowerPoint format. It provides operational reports for visibility on workloads, SLAs, TATs, and AHTs and also highlights automation opportunities
- Appian offers classroom training and has a free online training portal, Appian Academy, which includes video tutorials, role-based training and certification programs, and product feature guides. It also offers an online user community forum to help resolve customer queries/issues faster
- Clients have highlighted the intuitiveness of user interface, testing features, process monitoring, and insights as the key strength areas for Appian

Appian (page 2 of 2)

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Limitations

- While Appian serves clients in industries such as BFSI, healthcare & pharma, and government & public sector, its experience of serving enterprises in other industries such as manufacturing and hi-tech & telecom is relatively limited
- Currently, most of its clients are large enterprises with annual revenue greater than US\$1 billion; it has relatively low experience of serving clients in the small enterprise and SMB segments
- Appian currently does not provide the ability to simulate the process by configuring different 'what-if' scenarios and evaluating the performance of the process model for these different scenarios; however, this is in the roadmap
- While Appian has inbuilt RPA, process mining, API integration, and IDP capabilities, it currently does not have partnerships with other complementary technology providers such as task mining and conversational AI. There is also scope to expand its partnerships in areas such as RPA and process mining to offer greater flexibility to customers
- Appian is also currently in the process of incorporating its AppMarket listing into a native product offering, which will enable users to create a new AI design object for capturing custom AI/ML logic
- While the platform is built on microservices architecture, currently it does not support multi-tenant deployments, which may impact the scalability and maintenance efforts
- Clients indicated the scope to improve debugging capability and enhance the interfaces that are used in testing the process. They also highlighted the cost of the product as one of its key limitations

Microsoft (page 1 of 2)

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Strengths

- Microsoft offers process orchestration through its Power Platform, which is a collaborative and extensible platform of low-code tools including Power Automate, Power Apps, Power BI, and Power Virtual Agents. Its platform empowers users to streamline day-to-day process inefficiencies across their organization and its Power Apps enables users to build low-code applications to handle business challenges
- Microsoft allows users to create business process flows using its Solution Explorer, which can be accessed either through its Power Automate or Power Apps platform. The business process flows are BPMN 2.0 compliant, and the platform allows to track changes within the process models
- Within the Power Apps platform, users can view, edit, or create a business rule. Users can create different types of business rules such as conditional logic, decision tables, and decision trees. It also allows multiple users to modify business rules and offers the ability to share these rules across projects
- The Microsoft Power Apps platform allows users to create business applications with its drag-and-drop visual interface. It also offers a step-by-step wizard to help end users create business applications and provides the ability to automatically generate responsive applications compatible across devices
- The Solutions module within Power Apps is responsible for application lifecycle management, which allows developers to distribute components across environments through export and import features
- The Power Automate platform provides an interface to assign tasks/cases in near real-time to available resources and monitor their progress. It also allows users to add notes, comments, reference links, etc. to the tasks/cases and provides the ability to send reminders and notifications to users for pending items and updates
- It offers a control center for centralized management, orchestration, governance, and monitoring of digital and human workers. It provides the ability to centrally manage exceptions, configure rules or events to flag exceptions, and reroute the workflow to the right resources
- The platform provides monitoring and analytics features such as the ability to monitor the progress of processes and cases in near real-time against defined KPIs or metrics, the ability to create custom dashboards with Power BI templates, and generate reports in different formats
- The Microsoft Power Platform comprises various complementary technologies such as RPA, IDP, process mining, and task mining, which can be leveraged along with process orchestration capabilities. It has a strong technology partner ecosystem offering greater flexibility to customers
- AI Builder within the Power Platform helps users to automate processes and predict outcomes to improve business performance. Users can leverage different AI models created using the AI Builder to add intelligence to the applications developed

Microsoft (page 2 of 2)

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Limitations

- The Microsoft Power Platform lacks process modeling features such as the availability of a central tag manager that allows checking which objects are linked with a particular tag. There is also scope to provide the ability to simulate the process and evaluate the performance of a process model by defining 'what-if' scenarios
- While Microsoft Power Apps is focused on low-code application development and application lifecycle management, there is scope to invest more in the low-code/no-code form-building capabilities and offer more out-of-the-box form templates that help users build forms quickly
- It currently does not offer monitoring and analytics features such as operational reports for visibility on workloads, SLAs, TATs, and AHTs, productivity and utilization metrics for the human and digital workforce, and the ability to recommend automation opportunities
- The platform currently lacks advanced hybrid workforce management features such as AI-based task allocation for both digital and human workers and the ability to auto check-in, which uses AI to calculate the right interval for follow-up based on the due dates and delays that are detected
- There is scope to provide features such as the ability to automatically generate a checklist for different tasks (pending, ongoing, and completed) for the end users and a dashboard for real-time visibility into human and digital workforce operations for better resource utilization
- While the product architecture is based on loosely-coupled microservices and supports multi-tenant deployments, it is not deployed in a containerized form, thereby affecting scalability

Pega (page 1 of 2)

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Strengths

- Pega offers a low-code process orchestration platform that enables organizations to streamline their operations. It provides AI-based decisioning and workflow automation capabilities that help enterprises to deal with day-to-day business challenges and meet their customer demands
- Its low-code platform comes with a drag-and-drop interface, which allows users to design processes and add tags/notes to a process step for better collaboration. The Pega Scenario Planner helps users to simulate processes and evaluate the performance of a process by defining 'what-if' scenarios
- The platform has a business rules engine that enables users to build rules using logical expressions, constraints rules, decision tables, and decision trees. Enterprises can leverage the platform to manage the rule revisions and monitor rules' effectiveness
- The Pega App Studio is a low-code environment that allows users to develop and deploy business applications. The Pega App Factory provides a framework for application development lifecycle management to enable collaboration among developers
- The Pega Cosmos Design System comes with inbuilt design components, reusable templates, and patterns, which enables users to kickstart a project faster and reduces the overall application development time
- It provides hybrid workforce management features such as intelligent routing of tasks/cases in near real-time to resources for higher efficiency, alerting users for pending items and updates via email, and managing exceptions and configuring rules/events to flag exceptions
- Pega Applied AI is one of its key investments, which includes advanced features such as AI-based application development, integration with AI cloud services, process AI (predictive analytics for SLA breaches), and prescriptive analytics for next-best-action recommendations
- It offers in-house complementary capabilities such as RPA and process mining (through the acquisition of Everflow.ai in May 2022). It also partners with leading IDP providers such as AntWorks, SortSpoke, Amazon, Google, and ABBYY for AI-based document processing capabilities
- Pega offers classroom training and has a free online training portal, Pega Academy, which includes video tutorials, role-based training and certification programs, and product feature guides. It also offers an online user community forum to help resolve customer queries/issues faster

Pega (page 2 of 2)

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Limitations

- Currently, the majority of Pega’s clients are large enterprises with annual revenues greater than US\$5 billion; it has a relatively lower experience of serving clients in the midsize, small, and SMB segments
- Clients have deployed Pega’s process orchestration platform largely for front-office use cases in contact center scenarios and for industry-specific processes in BFSI. It has limited experience of orchestrating processes in other key horizontal areas such as F&A, procurement, IT service management, and HR as well as in other industry-specific processes in the healthcare and CPG & retail verticals
- There is scope to improve the value proposition of its platform by adding advanced features such as a syntax detector to identify any errors in the process diagram or process map and a dashboard to monitor the execution performance of business rules
- It has limited technology provider partners in its partnership ecosystem compared to similar-sized firms. This could limit the reach of the product and make it less attractive for enterprises looking to integrate with the best-of-breed providers of complementary technologies such as conversational AI, RPA, process mining, and task mining
- While Pega offers both online training and classroom training, it currently offers classroom training only in English and does not support local languages such as Spanish, Italian, French, and German. This could limit the reach of its training programs

06

Enterprise sourcing considerations

- Major Contenders

- AgilePoint
- AuraQuantic
- Camunda
- Enate
- EvoluteIQ
- FireStart
- GBTEC
- Kofax
- Nintex
- PMG
- SS&C Blue Prism
- Ultimus

AgilePoint (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Strengths

- AgilePoint NX is a digital process automation platform with a focus to automate complex processes. It is currently focusing on improving AI-based application design and eForms designer, building new integrations, and improving implementation and support
- AgilePoint holds experience of serving enterprises across different geographies such as North America, Continental Europe, APAC, MEA, and the UK. Its client portfolio spans diverse industries such as BFSI, healthcare and pharma, CPG and retail, government and public sector, hi-tech & telecom, and manufacturing
- It provides business rules management features such as support for conditional logic and decision tables and the ability to add custom business rules via custom scripting and drag-and-drop interface
- It enables enterprise users to create process-centric business applications and offers the ability to create dynamic forms, i.e., displaying new fields based on the response to the existing field(s); developers can also customize pre-built form templates
- AgilePoint with the PMI citizen developer canvas facilitates application development lifecycle management. It also offers an App Store for collaboration and reusability of applications developed by business users
- Its hybrid workforce management features include AI-based task allocation for both digital and human workers and the ability to auto check-in, which uses AI to calculate the right interval for follow-up based on the due dates and delays that are detected
- The platform can centrally manage exceptions, configure rules or events to flag exceptions, and reroute the workflow to the right resources. It can also start, schedule, or stop robotic processes on-demand, and can optimize and balance workloads between the human and digital workforce
- The platform enables users to create customizable analytics dashboards based on user requirements / user-defined queries and generate reports in different formats (MS Excel, PDF, MS PowerPoint, etc.). It also provides analytics of productivity and utilization metrics for the human and digital workforce
- It offers several pre-built connectors with different enterprise applications, automation solutions, databases, and BI tools, which enables smooth integration and interoperability
- Its product architecture is developed using loosely-coupled microservices and supports multi-tenant deployments, which enhances scalability and reduces downtime for feature upgrades
- Enterprises have the flexibility to adopt a hybrid model with components such as databases on-premise as well as design studio and the control and monitoring functionality offered on-cloud
- Clients highlighted the ease of use of the platform, the product roadmap, and the product support as its key strengths

AgilePoint (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Limitations

- The platform does not offer advanced process design and management features such as the ability to simulate the process and evaluate the performance of a process model by defining 'what-if' scenarios
- AgilePoint currently does not have a pre-built library/repository of business rules. It also lacks business rules management features such as the ability to discover existing business rules
- Its low-code/no-code user development interface currently does not support AI-based automated testing of developed applications. Out-of-the-box pre-built modules / UI for customer-facing applications is currently not available and is in the roadmap. Clients have also highlighted the scope to improve the forms engine
- There is scope to improve its hybrid workforce management capabilities by adding features such as the ability to automatically generate a checklist for different tasks (pending, ongoing, and completed) for the end users. Clients have also indicated that there is scope to improve its hybrid workforce management capabilities
- AgilePoint does not offer process monitoring and analytics features such as the ability to detect bottlenecks in the process, recommend actions to improve the processes, identify automation opportunities, and provide insights around the impact on defined KPIs and business metrics. Clients have expressed that there is scope to improve its process analytics features
- The value proposition of the platform is not very strong for enterprises looking for a process orchestration platform integrated with complementary capabilities. AgilePoint has relatively fewer technology and service provider partners, limiting its market outreach. Clients have also expressed the need for more integrations with RPA solutions
- AgilePoint does not offer a free community version of the platform, thereby affecting the platform's familiarity and adoption in the market. However, this is in the roadmap
- Clients have indicated the scope to improve the training and onboarding process for new users. They also expect AgilePoint to expand on the low-code offerings and provide role-based access for central management

AuraQuantic (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Strengths

- AuraQuantic offers a digital transformation platform to orchestrate business processes and workflows that helps enterprises optimize processes, improve business competitiveness, and generate value for its customers. It plans to enhance its capabilities by investing in ML, predictive platform maintenance, improved AI automated testing, and auto-generated ROI and reports
- It has recently introduced features such as contextual encryption, advanced analytics, external collaboration, advanced data management, and connectivity, all keeping customer requirements in mind
- The platform provides a drag-and-drop visual interface to design/model the processes. It offers a feature named Syntax Detector, which helps users to rectify any errors in the process modeling stage. It also offers a dedicated marketplace for pre-defined templates to design processes quickly and supports dynamic process design
- The platform allows users to configure various types of rule models such as conditional logic, mathematical expressions, decision tables, and decision trees
- AuraQuantic offers the ability to build dynamic forms that are compatible across different devices using its drag-and-drop interface. It also offers pre-built form templates for common use cases such as document approval, ticket management, leave request management, and purchase order requests
- The platform comes with a low-code/no-code interface for application development that caters to both business users and professional developers. It offers a step-by-step wizard to help end users create these applications with ease and enables multi-device compatibility across mobile and laptop
- The platform supports real-time workforce monitoring with detailed metrics on human and digital tasks, automatically detects bottlenecks, and provides insights on top performers and underutilized resources. It also offers unlimited Power BI licenses to customers to view dashboards and reports within the software
- AuraQuantic supports hybrid workforce management capabilities such as the ability to optimize and balance workloads between human and digital workforce, AI-based task allocation across resources, and the ability to centrally manage exceptions and reroute the workflow to appropriate resources
- It offers an online training portal, which comprises self-paced training modules, role-based training, and online certification courses. It also offers an online user community to help customers collaborate and resolve queries faster
- Clients have highlighted the ease of use, ability to orchestrate complex processes, flexibility, and customizability as the key strengths of AuraQuantic. They also appreciated its product support

AuraQuantic (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Limitations

- The majority of AuraQuantic’s clients are based out of Continental Europe, the UK, LATAM, and MEA. It has relatively lower presence in other key geographies such as North America and APAC
- While AuraQuantic has experience of serving clients in BFSI, manufacturing, government and public sector, and CPG & retail industries, its ability to serve companies in other key verticals such as healthcare & pharma and hi-tech and telecom is relatively untested
- The process orchestration client portfolio of AuraQuantic is skewed toward SMBs and small enterprises. Its experience of serving midsize and large enterprises with revenue greater than US\$1 billion is relatively untested
- Support for business rules and decision management can be further improved by providing a pre-built library/repository of business rules that will help reduce the time taken for process design
- While AuraQuantic offers fixed-fee and user-based licensing, it currently does not offer other licensing models such as process-based and solution-based licensing models. Offering such models would provide more flexibility to clients with different user requirements
- While it provides out-of-the-box integration with complementary capabilities such as RPA and conversational AI, there exists scope to offer greater flexibility to clients by expanding its technology provider partner ecosystem, especially in areas such as process mining and task mining
- The product architecture is based on loosely-coupled microservices and supports multi-tenant deployments; however, it is not deployed in a containerized form, which can impact the scalability
- AuraQuantic does not offer a free community version of its process orchestration platform. This could limit its familiarity and adoption in the market, especially among small enterprises and SMBs
- While AuraQuantic provides both classroom and online training, the training is available only in English and Spanish languages. There is scope to offer training in other local languages such as French, German, Dutch, Italian, and Portuguese

Camunda (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Strengths

- Camunda’s vision is to democratize process orchestration that spans people, systems, and devices throughout the organization without compromising on developer-oriented, open architecture. It focuses on enhancing business-IT collaboration and developers’ productivity through process design features, product capabilities, and improved UX
- Camunda has experience in catering to enterprises of all sizes. It is able to effectively leverage its partner ecosystem to offer tailored services to its customers
- The platform has two drag-and-drop interfaces for building process maps – a desktop application and an online tool with collaboration features. It supports multiple users working together simultaneously who can troubleshoot and update processes in real time
- It offers a simulation functionality for process maps and branch analysis that can be used to determine the likelihood of a process being completed when a certain logical branch is followed. It also has integrated debugging capabilities for process models and user task forms
- Enterprise users can design business rules through DMN and FEEL standards. The platform supports various types of rule models including logical expressions, decision tables, and decision trees. There is additional flexibility for custom business rules implementations wherein a developer can reuse hardcoded rules from legacy or homegrown systems until those rules can be recodified in DMN
- The platform has a drag-and-drop interface for building user task forms and also provides a repository of form templates where users can browse, copy, modify, and attach forms to their process models
- The platform has a central UI for the management of human and digital workers, which provides real-time visibility into all process operations and automatically generates a checklist for different tasks. Users can manage exceptions, reroute workflows, and perform troubleshooting operations using this interface
- The platform supports monitoring of human and digital tasks, automatically detects bottlenecks, and provides insights on top performers and underutilized resources. It has a component called Optimize that specializes in BPMN-based analysis and detects the likelihood of different outcomes during a process
- The platform comes in two modes – SaaS as well as a self-managed version. It consists of multiple independent components for specific core functionalities, is optimized for deployment in containers, and supports multi-tenant deployment
- Camunda offers a free community edition of its product, both as SaaS and self-managed versions. Clients can choose to have an advanced SLA (24/7 support) or a standard SLA (8/5 support)
- Clients appreciate the scalability offered by Camunda. They have also highlighted the focus on customer success and support as a key strength

Camunda (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Limitations

- The majority of Camunda’s clientele is from North America and Continental Europe. It has a limited presence in geographies such as APAC, MEA, and LATAM
- Camunda currently focuses majorly on the BFSI and hi-tech & telecom industries. Its experience of serving enterprises in other industry verticals such as healthcare & pharma, manufacturing, and CPG & retail is relatively untested
- The management of business rules within Camunda’s platform can be further enhanced by providing features such as a low-code/no-code design environment for generating custom predictive rules, availability of pre-built repository of business rules, dashboard to monitor the execution performance of business rules, and functionality to discover existing rules
- While users can customize pre-built form templates, the platform lacks advanced capabilities such as building data lookups using database connections. The ability to create dynamic forms based on the response to existing fields is in the roadmap. Clients have indicated that there is scope to improve form-building capabilities
- The platform has the scope to enhance its capability for creating business applications by adding advanced features such as guidance for end users to create applications, out-of-the-box pre-built modules for customer-facing applications, multi-device compatibility of developed applications, and AI-based automated testing of applications. Advanced form debugging and validation features are in the roadmap
- There is scope to offer a variety of pre-built connectors with enterprise applications, automation solutions, and databases. Camunda has already started investing in the development of reusable connectors through formal partnerships with technology providers
- The platform can further enhance its hybrid workforce management by adding inbuilt algorithms to optimize and balance workloads between digital workers. It also lacks the ability to synchronize tasks and calendar with tools such as Microsoft Planner and Google Calendar
- There is scope to add monitoring capabilities such as predictive maintenance of the processes through AI-/ML-based models and to provide pre-built connectors for third-party BI solutions
- Complementary technologies such as IDP, process mining, and task mining are not available either in-house or via partnerships, though establishing partnerships with RPA and conversational AI partnerships are in the roadmap. Clients have indicated that there is scope to improve integration with complementary technologies
- Camunda offers a solution- and server-based licensing and lacks other options such as user-based and process-based pricing models. Introducing such constructs would provide greater flexibility to enterprises and more options to choose from as per their requirements
- Clients have highlighted the scope of improvement in Camunda’s low-code/no-code interface, IDE integration, and documentation. Clients also indicated flexibility and ease of deployment as its other limitations

Enate (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Strengths

- Enate’s vision is to simplify the future of work for humans by empowering citizen developers. It is investing in its core product capabilities to make digital workers easy to adopt and integrate without the need for IT involvement
- Enate offers a simple and user-friendly interface for process design. The platform supports dynamic process design, enables the reusability of components through a common repository, and has pre-built processes for specific use cases
- The testing mode, integrated within the platform, allows the complete application lifecycle to be supported within a single instance without the need to manage multiple environments for development, testing, and production
- The platform offers an easy-to-use interface that allows users to define different types of rules. It has a central repository that enables the reusability of rules, makes relevant rule types available for users to choose from, and highlights if a second rule is being created with a similar definition to an existing rule
- The platform enables users to create custom forms by selecting data and the system manages the display and organization. Most of the user interface and features such as managing checklists, files, state change, peer review, and defect capture are available as part of the platform’s UI, reducing the need for users to build custom forms for basic actions
- It offers out-of-the-box pre-built form templates for HR use cases such as employee onboarding and ticketing. Plans to launch templates for F&A services and vendor management are currently in the roadmap
- Enate has a provision to connect with various mail services. It supports API-based integration with clients’ BI environments, allowing the process data to be used extensively within common BI environments
- The platform has resource allocation algorithms to allocate work to human and digital workers, and built-in algorithms to optimize and balance workload based on SLA, priority, and skill sets. It offers the ability to manage exceptions and reroute the workflow to appropriate resources
- It offers comprehensive monitoring and analytical capabilities including the detection of trends and outliers and productivity metrics for both digital and human workers compared against benchmark and peer performance. It also uses an understanding of task skills, activity cost, and user profiles to recommend automation opportunities
- Enate provides out-of-the-box integrations with complementary technologies such as RPA, IDP, and task mining, enabling enterprises to leverage a best-of-breed approach toward intelligent automation

Enate (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Limitations

- Enate’s clientele is mainly based out of Continental Europe, APAC, and the UK. Its experience of serving clients in other geographies such as North America, LATAM, and MEA, is relatively untested
- Enate majorly caters to the professional services and BPO sectors and has some presence in the BFSI industry. Its experience in serving companies in other key verticals such as healthcare, CPG & retail, and manufacturing is relatively untested
- Its client portfolio is skewed toward large and midsize enterprises with revenue greater than US\$1 billion. It has limited experience in serving clients from SMBs and small enterprise segments
- While the Enate platform offers key features for business rules management, there is scope to support other rules models such as decision tables and decision trees and offer an intelligent low-code/no-code design environment for the generation of custom predictive rules
- While Enate is building a step-by-step wizard within the user interface to help end users create the applications with ease, there is scope to add additional features such as AI-based automated testing of developed applications. An app store/repository for collaboration and reuse of applications developed by business users is currently not available
- The ability to synchronize tasks and calendars with tools such as Microsoft Planner and Google Calendar is not available currently. While the platform has extensive analytical capabilities, there is scope to add features such as the detection of bottlenecks in the process and predictive maintenance of processes
- It currently does not offer out-of-the-box pre-built connectors for enterprise systems (SAP, Salesforce, etc.), databases, and process mining solutions. However, this is in the roadmap
- While the platform has key security and compliance features, it can be further enhanced by providing the ability to redact sensitive information from documents either temporarily or permanently
- The product architecture is based on loosely-coupled microservices and supports multi-tenant deployments; however, it is not deployed in a containerized form, which can impact the scalability
- While Enate provides an online portal for training and certification, it presently does not have training partners, limiting the accessibility of its product training for clients
- Enate currently offers user-based licensing and lacks other prevalent models such as process-based and solution-based pricing. Introducing such constructs would provide greater flexibility to enterprises and more options to choose from as per their requirements

EvolutelQ (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Strengths

- EvolutelQ envisions enabling intelligent automation at scale and aims to cater to citizen developers at a lower cost. Its intelligent automation platform comprises process orchestration, data and event processing, RPA, IDP, blockchain, enterprise connectors, and AI/ML capabilities. Its key areas of investment include improvements to the RPA studio, unified data infrastructure, and the expansion of the partnership network
- EvolutelQ’s e.IQ platform has pre-defined modeling templates for process overview diagrams and detailed flowcharts. It can also generate process-based manuals for training, certifications, and audits
- Its business rules management features include the ability to discover existing business rules and add custom business rules either through a drag-and-drop interface or through custom scripting. It also has a low-code/no-code design environment for generating custom predictive rules using AI/ML
- The e.IQ platform enables users to create process-centric business applications using a drag-and-drop visual interface. These applications are multi-device compatible, which offers support for desktops, mobiles, and tablets. It also provides an application development lifecycle management system to enable collaboration among the developers
- Its hybrid workforce management features include AI-based task allocation to both digital and human workers. It supports auto check-in and follow-up based on due dates and delays. Enterprise users can get real-time visibility into human and digital workforce operations through its analytics dashboards
- Its process orchestration platform offers broader automation capabilities such as RPA, IDP, process mining, task mining, conversational AI, and API-based automation either through inbuilt features or via formal partnerships. It also offers pre-built connectors with enterprise applications, external databases, and BI tools, thereby enabling greater interoperability
- The platform offers operational reports for visibility on workloads, SLAs, TATs, and AHTs. It also offers the ability to create customized dashboards based on user requirements / user-defined queries
- Its platform is developed using loosely-coupled microservices and can be deployed in containerized form, which enhances scalability and reduces downtime for feature upgrades. It also supports multi-tenant deployments
- It offers flexibility in deployment on-premise, on public and private cloud, and as a SaaS offering
- Clients have highlighted its flexible and transparent licensing model as one of its key strengths. Clients also appreciate the scalability and ease of use of the platform. They have highlighted integrations with different technologies and its low-code/no-code interface as other key strengths

EvolutelQ (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Limitations

- The majority of the client base for EvolutelQ is based out of North America and the UK. Its experience of serving enterprises in other geographies such as Continental Europe, LATAM, and MEA is relatively limited
- While it serves various industries and process areas, it has limited experience in serving clients in CPG & retail, manufacturing, HR, and information technology service management
- Although it supports dynamic process design, its ability to simulate process and evaluate the process performance by defining ‘what-if’ scenarios is still in the roadmap. Clients also expect advanced process discovery capabilities to be incorporated within the platform
- EvolutelQ does not provide a pre-built library/repository of business rules. The platform also does not provide AI-based automation testing for developed applications
- The ability to detect bottlenecks in the process and recommend actions to improve processes is still in the roadmap. Currently, this feature is provided using third-party integrations
- The platform currently does not provide productivity and utilization metrics for the human and digital workforce such as insights on top performers, top teams, and underutilized resources. There is scope to add advanced capabilities such as recommending automation opportunities and providing insights around the impact on defined KPIs and business metrics
- EvolutelQ does not have an inbuilt credential vault. However, out-of-the-box integration with a specialized provider of credential vaults (e.g., CyberArk and Azure key vault) is in the roadmap
- It does not have an online user community and support forum, and the availability of online certification courses is still in the roadmap. Lack of certified training partners further limits the reach and accessibility of its training program. It does not offer a free community version of the platform, thereby affecting the platform’s familiarity and adoption in the market
- It currently offers solution-based licensing and lacks other prevalent models such as user-based pricing. Introducing such constructs would provide greater flexibility to enterprises and more options to choose from as per their requirements
- Clients have highlighted the scope to offer more industry-specific use cases which would help enterprises to handle complex problems. Clients have also indicated that there is scope to improve process monitoring and analytics capabilities

FireStart (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Strengths

- FireStart envisions to optimize organizational processes by helping to create structure and efficiency for business and IT users. Its iPMS platform consists of process management, process automation, and process intelligence modules, which helps accelerate digital transformation. It also offers a cloud version named FireStart Cloud to automate workflows and tasks and help businesses build scalable processes
- FireStart offers a drag-and-drop interface, which enables users to design and map processes. It also provides the ability to assign tags to process steps and allows users to import and export process models in different formats such as BPMN 2.0, Visio, and XPD files
- The platform comes with different types of rule models such as conditional logic, decision tables, and decision trees, which help users to configure business and decision rules of any complexity with its drag-and-drop interface
- FireStart offers a pre-built repository of business rules to help users with the faster configuration of rules for common use cases and also allows users to build their own custom rules
- The Smart Form Builder allows users to create digital forms with its drag-and-drop interface that has various controls and data types. It offers pre-built form templates for use cases such as expense management, HR onboarding, invoice processing, and purchase requests
- The platform allows business users to build process-centric applications to automate and execute workflows. It offers a step-by-step wizard to help end users create these applications with ease and enables multi-device compatibility across devices such as mobile and laptop
- The platform facilitates task assignment to both human and digital workers and comes with native plugins for the existing collaboration environments for human workforce management. It comes with pre-built connectors for leading third-party RPA providers and AI/ML services to control, manage, and execute robotic workflows
- It provides out-of-the-box dashboards for process monitoring and insights along with the option to export these dashboards in Microsoft Word or PowerPoint format. It also allows users to add and manage widgets to these dashboards
- FireStart has a formal partnership with UiPath for RPA and process mining. It also has partnerships with ABBYY for IDP and Celonis for process mining and task mining
- Clients have highlighted its process modeling features with BPMN 2.0 support, process monitoring and insights, interoperability, and ease of use as the key strength areas for FireStart. They also highlighted customer orientation and flexibility as one of its key strengths

FireStart (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Limitations

- The majority of FireStart’s clients are based out of Continental Europe. It has a relatively limited presence in other key geographies such as North America, the UK, APAC, LATAM, and MEA
- Its process orchestration client portfolio is skewed toward SMBs and small enterprise segments. Its experience of serving midsize and large enterprises with revenue greater than US\$1 billion is relatively limited
- FireStart currently does not provide the ability to simulate the process and evaluate the performance of a process model for different scenarios
- There is scope to add advanced business rules management features such as a low-code/no-code design environment for generating custom predictive rules using AI/ML
- FireStart does not offer out-of-the-box pre-built modules / UI for customer-facing applications and lacks the ability to allow users to debug and evaluate the UX of UIs. It also does not have an app store or repository that allows collaboration and reusability of applications developed by enterprise users. Clients have indicated that there is scope to improve its application development capabilities
- It lacks process monitoring and insights capabilities such as the ability to detect bottlenecks in the process, the ability to identify automation opportunities, and AI/ML models for predictive maintenance. It also does not provide the ability to create customized dashboards based on user requirements / user-defined queries
- It lacks security and compliance features such as the ability to redact specific PII data in documents either temporarily or permanently and out-of-the-box integration with a specialized provider of credential vaults (e.g., CyberArk and Azure key vault)
- While it has a dedicated online training portal, it currently does not offer role-based training courses and has only a few training partners, thus limiting the accessibility of training to its clients. Clients also highlighted that there is scope to offer more manuals for self-training
- FireStart does not offer an online support forum, which may lead to delayed issue resolution. Additionally, it does not offer a community edition of its platform, which affects the platform’s familiarity in the market. Clients have also indicated there is scope to improve product support
- Clients indicated the scope to improve business rules and decision management capabilities, enhance the forms generator, enable tighter integration with SharePoint, and provide more clarity on their product vision and roadmap

GBTEC (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Strengths

- GBTEC aims to offer a modern, easy-to-use, and intuitive solution that allows rapid deployment of business unit-specific automated workflows and create a central management space for process-related applications
- It has a balanced portfolio with an experience of serving clients across industries and process areas including BFSI, manufacturing, healthcare and pharma, and hi-tech and telecom verticals
- GBTEC’s process orchestration platform, BIC Process Execution, offers an intuitive interface allowing users to design and document process maps easily. Its drag-and-drop interface has pre-defined modeling templates for process overview diagrams, quick modeler function that automatically suggests next symbols, and fine-grained logic check with correction suggestions
- The BIC platform supports BPMN 2.0 and DMN notation and has an integrated rules engine that allows customers to define specific business rules. Various rules models such as logical expressions, decision tables, and decision trees are part of the integrated DMN package
- It has a pre-built repository of business rules and the capability to import pre-built rules. Business rules can be collaboratively developed by authors similar to any other content of a process diagram and the access rights for authors can be controlled in the process
- The platform offers a unified interface to access the repository of the form templates created by end users. Pre-built form templates are also available out-of-the-box for common use cases such as client onboarding, automating compliance, audit, and risk processes
- GBTEC offers pre-built connectors for a range of enterprise applications, automation solutions, databases, BI tools, and process mining solutions, thereby enhancing the interoperability of the platform. Support for headless browsers and a REST API to perform actions in a process are also available
- The platform has an interface to assign tasks/cases in near real-time to available resources and integrated dashboards to provide real-time visibility into human and digital workforce operations
- It also enables AI-based task allocation through Google AutoML and NLP by classifying incoming requests and assigning it to the right employees in the team. Clients have highlighted the dynamic staffing of processes at run-time as a strength
- The platform comes with monitoring and analytics component that monitors progress in real-time against defined metrics, benchmarks internal and external process performance, provides insights on top performers, detects bottlenecks in the process, and recommends automation opportunities
- The product can be hosted on-premise as well as on public and private cloud and can be availed in the SaaS model as well
- Clients have appreciated the integration between process design and execution, ease of automation setup, and its low-code/no-code approach

GBTEC (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Limitations

- A significantly large share of GBTEC’s clientele is from Continental Europe. It has limited presence in other geographies, especially in the UK and LATAM regions
- It has limited experience in serving SMBs and small enterprises with revenue less than US\$1 billion as most of its revenue comes from large clients with revenue more than US\$5 billion
- While it has good functionalities for managing business rules in its platform, a low-code/no-code design environment for generating custom predictive rules is currently not available. However, the platform offers capabilities to configure a connection with Google AI platform to run such advanced algorithms externally
- The platform provides low-code/no-code interface for application development; however, there is scope to add advanced application development capabilities such as AI-based automated testing of developed applications
- The BIC platform offers the capability to auto check-in. Currently, the platform uses existing process information to calculate the right interval for follow-up based on due dates and delays that are detected. Hybrid workforce management capability can be enhanced by introducing AI-powered calculation of follow-ups, which is in the roadmap for GBTEC
- Hybrid workforce management capabilities can be further improved through the availability of inbuilt algorithms to optimize and balance workloads between the digital workforce and human workforce
- Currently, GBTEC’s customers can use process mining predictive capabilities to analyze processes. Such analytical capabilities can be enhanced by developing predictive maintenance functionalities through AI-/ML-based models. This feature is part of GBTEC’s roadmap
- While the BIC platform enables security and compliance in client organizations, inbuilt credential vaults are in the roadmap and not yet available for customers. Out-of-the-box integration with specialized providers of credential vaults is also not available
- GBTEC lacks built-in complementary capabilities such as RPA and IDP. However, such functionalities are made available through formal partnerships with relevant providers
- Clients have highlighted a scope for improvement in features related to the escalation of overdue tasks and notifications/reminders to users for pending items or updates

Kofax (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Strengths

- Kofax offers process orchestration capabilities for automating workflows and managing the hybrid workforce. Its TotalAgility platform is responsible for process design and has an interface targeted at citizen and professional developers
- Its key investment areas include optimizing the design experience for citizen developers via augmentation of the wizard-based interfaces, augmenting the library of connectors, and delivering more vertical solutions and use case-centric IPs that accelerate time to value for its customers
- The platform offers a process design tool, which allows users to create process maps that are compatible with BPMN 2.0 standards and offers a comprehensive audit trail to track any changes to the process. It supports annotations, which allows users to add extra information related to a process
- Kofax TotalAgility provides support for the creation of different business rule models such as conditional logic, nesting, decision trees, and decision tables. It also offers an integrated testing feature that allows users to check if the business rule works as desired
- The platform comes with a form designer that allows users to create any form type in a low-code design environment. Kofax also offers pre-built standard forms for common use cases and supports the reusability of existing process-centric applications and forms via the Kofax SmartHub. Clients have also highlighted form designing as one of its key strengths
- Kofax Quick Apps enables citizen developers to build applications in a wizard-based interface without any coding requirements. It also offers application development lifecycle management to enable collaboration among developers
- The platform provides the ability to automatically assign tasks to resources through work allocation rules by manual assignment or allow users to select from a queue. It allows users to configure triggers and alerts for cost violations, process and activity target duration breaches, deadline violations for milestones, and impending escalations
- The platform can be integrated with Kofax RPA as well as with other RPA platforms such as UiPath, Automation Anywhere, and SS&C Blue Prism to orchestrate the digital workers
- Kofax offers classroom training and has a free online training portal, which includes self-paced training modules, role-based training, and certification courses. It also offers an online user community to help resolve customer queries/issues faster
- Clients have highlighted process agility, speed of delivery, custom development through .NET, and integration with Kofax IDP as key strength areas. They have also indicated Kofax TotalAgility as a comprehensive platform that can be integrated with different enterprise systems and databases

Kofax (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Limitations

- Currently, Kofax’s focus is on serving clients in geographies such as North America and Continental Europe. It has relatively low experience in serving enterprises in emerging geographies such as MEA and LATAM
- The platform currently does not provide the ability to export the designed process models to different interoperable formats such as Visio, XPD, or BPMN 2.0
- Kofax TotalAgility lacks a pre-built library or repository of business rules for faster configuration of rules and a low-code/no-code design environment for generating custom predictive rules using AI/ML
- The platform currently does not provide advanced hybrid workforce management features such as AI-based task allocation for both digital and human workers. Clients have also indicated that there is scope to improve its hybrid workforce management capabilities
- While Kofax offers out-of-the-box dashboards for monitoring and analytics, it does not provide the ability to add and manage widgets for analytics dashboards. It lacks out-of-the-box AI/ML algorithms for predictive maintenance of the processes. Clients have also highlighted process monitoring and analytics as one of its key limitations
- While the platform supports Open Authorization (OAuth) and active directory security systems, there is scope to offer credential vaults either inbuilt within the platform or by partnerships with third-party providers for better data security
- Kofax currently does not have technology partnerships with providers of complementary technologies such as process mining and task mining. This might hamper the adoption for enterprises that are looking to adopt a best-of-breed approach toward intelligent automation
- Although the TotalAgility platform can be deployed in a containerized form, it is not developed using loosely-coupled microservices, impacting the roll-out speed of new features and upgrades
- Clients have indicated that there is scope for improvement in backward compatibility testing for new software versions for forms and processes that are built on older versions
- Clients highlighted the cost of entry, support during upgrades, and training costs as key limitations of Kofax. In terms of product training, they expect Kofax to enhance its training modules to include more advanced features

Nintex (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Strengths

- Nintex’s low-code process platform helps enterprises to plan, map, and manage their business processes. Its vision is to improve the way enterprises work with a drag-and-drop tool for visually managing, automating, and optimizing business processes
- The Nintex Promapp allows users to collaborate on process maps by utilizing a drag-and-drop visual interface that uses standard flowchart symbols. Nintex Promapp also supports dynamic process design and allows users to record tags for better collaboration on process maps
- The Nintex Forms Designer provides users the ability to build dynamic forms that are utilized as a part of the process-driven app. It includes out-of-the-box controls, a rules designer, and custom styling options. It allows users to add features such as barcode scanners, geolocation tags, images, and attachments to the forms
- The Nintex Forms rules builder helps users to create and apply different types of rules such as advanced logic, decision tables, and decision trees. Users can also leverage its pre-built library of business rules to build dynamic forms that respond based on user input
- The Nintex App Studio allows users to easily build and deploy custom mobile applications across the Nintex Workflow Cloud and SharePoint environments without writing any code. Nintex, through its K2 software acquisition, has enhanced its application development capabilities and lifecycle management capabilities
- The platform provides the ability to assign tasks to available resources and centrally handle exceptions, thereby allowing better workforce management. It gives a view on the status of workflows that have gone into an error state, allowing users to identify bottlenecks in the process
- Nintex Analytics provides out-of-the-box dashboards to monitor the progress of processes and cases in near real-time against defined KPIs or metrics. It also provides an OData feed that can be utilized within third-party BI tools such as Tableau or PowerBI to enable the creation of custom dashboards
- Nintex Xtensions is an extensibility framework for Nintex Workflow Cloud, allowing users to create their custom connectors/extensions to connect to third-party platforms in their workflows. Users can also leverage sample Xtensions from the Nintex Accelerator Gallery to build their processes faster
- Nintex offers classroom training and has a free online training portal, Nintex University, which includes self-paced training modules, role-based training and certification programs, and product feature guides. It also offers an online user community to help resolve customer queries/issues faster

Nintex (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Limitations

- The client portfolio of Nintex is skewed toward small enterprise and SMB segments with revenue less than US\$1 billion. It has relatively lower experience of serving clients in midsize and large enterprise segments
- Nintex Promapp lacks process discovery features such as the ability to import from interoperable formats such as Visio, XPD, or BPMN 2.0 and process debugging features to test a process before publishing. It currently does not provide the ability to simulate process and evaluate the performance of a process model by defining 'what-if' scenarios and this is in the roadmap
- The platform does not offer few business rules management features such as the ability to discover existing business rules, a dashboard to monitor the execution performance of business rules, and a low-code/no-code design environment for generating custom predictive rules using AI/ML
- Low-code/no-code user interface development features such as application development lifecycle management to enable collaboration among developers are in the roadmap
- The platform currently does not provide key hybrid workforce management features such as AI-based task allocation for both digital and human workers and the ability to auto check-in to calculate the right interval for follow-up based on due dates and delays that are detected
- Nintex Analytics lacks features such as ability to provide insights on top performers and top teams, and the ability to recommend automation opportunities and provide insights around the impact on defined KPIs and business metrics
- Features such as document sharing (among enterprise users) within the platform, a native database for storing process-/case-related information, and the ability of the platform to create a Single Source of Truth (SSOT) for effective data management are currently not available
- Nintex offers process-based pricing to its customers and lacks other prevalent options such as user-based and solution-based pricing models. Introducing such constructs would provide greater flexibility to enterprises and more options to choose from as per their requirements
- Nintex does not offer a free community version of its process mining platform. This could limit its familiarity and adoption in the market, especially among small enterprises and SMBs. The product support can be enhanced by providing an embedded help tool that can resolve simple queries within the platform

PMG (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Strengths

- PMG offers a low-code/no-code process orchestration platform that empowers organizations to quickly build applications and automation solutions using a drag-and-drop interface. Its key investments include enterprise data encryption and enhancements to the application development lifecycle management
- PMG’s workflow designer offers a drag-and-drop interface to design process maps and make dynamic changes. It also provides features such as the ability to simulate the process by defining 'what-if' scenarios and to debug the processes through its Execution View feature
- PMG’s platform allows users to configure various types of rule models such as conditional logic, mathematical expressions, decision tables, and decision trees. For building custom rules, it offers support for different scripting languages such as SQL, C#, and Python, along with the drag-and-drop interface. It also offers the centralized management of rules to facilitate the sharing of rules across projects
- The PMG Form Designer allows users to create dynamic forms and also offers out-of-the-box solution templates for use cases such as case management, employee onboarding, and ticket management. The forms are automatically constructed using responsive design so that they can be rendered across device types. Clients have also highlighted widgets and forms that PMG offers as one of its key strengths
- PMG’s App Designer allows users to build applications without any coding requirements. It offers out-of-the-box templates for applications. It also allows the debugging of applications before deployments
- Its remote package manager allows retrieving applications, forms, and workflows from remote environments, both internally for a customer and from external repositories
- Its workflow engine allows users to optimize and balance workloads between the human and digital workforce. The human workforce can be managed through personalized dashboards and queues. PMG's work dashboard provides out-of-the-box views and supports user-configured views to list tasks in the desired order and with desired columns of information
- Its monitoring capabilities allow users to monitor the progress of processes or cases, build personalized dashboards, and generate operational reports for visibility on workloads, SLAs, TATs, and AHTs
- PMG provides over 50 pre-built connectors in its platform. These connectors are responsible for the interoperability of its workflow designer, which can be integrated with different enterprise applications (SAP, Salesforce, etc.), automation solutions (UiPath), databases, and BI tools (Power BI, Tableau, etc.)
- It partners with Microsoft Azure and Amazon Web Services (AWS) for cloud deployments. Along with cloud deployments, it also offers support for on-premise deployment
- Clients have highlighted the ease of use, quick deployment of the platform, time-to-market, flexibility, and product support as its key strengths

PMG (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Limitations

- PMG’s client portfolio is skewed toward North America; its experience of serving enterprises in other geographies such as Continental Europe, the UK, LATAM, MEA, and APAC is relatively limited
- While PMG has clients across industries such as the BFSI, CPG & retail, healthcare & pharma, and manufacturing verticals, its experience in serving clients in other key sectors such as government & public sector and hi-tech & telecom is limited
- PMG’s process designer lacks key process design features such as the ability to import from or export to interoperable formats such as Visio, XPDL, or BPMN 2.0 and out-of-the-box process modeling templates for process diagrams and flowcharts
- It does not provide a few business rules management features such as the ability to discover existing business rules, the ability to support DMN standard for decision modeling, and the availability of a low-code/no-code design environment for generating custom predictive rules using AI/ML
- While the PMG platform has a drag-and-drop visual interface for application development, offering a step-by-step wizard to help end users create business applications would improve the value proposition further. It currently does not offer AI-based automated testing of developed applications
- PMG does not provide out-of-the-box integration with complementary capabilities such as process mining, task mining, and conversational AI. Therefore, it has a limited value proposition for enterprises looking to integrate process orchestration with best-of-breed intelligent automation technologies/solutions
- Monitoring and analytics features such as the ability to detect bottlenecks in the processes, the ability to recommend automation opportunities, and AI-/ML-based models for predictive maintenance of the processes, are currently not available in the platform
- PMG does not provide an online training portal and has relatively few training partners, limiting the flexibility and accessibility of its product training for clients. It does not offer a free community version of the platform, thereby affecting the platform’s familiarity and adoption in the market
- PMG offers a hybrid of fixed-fee and user-based pricing and lacks other options such as user-based, process-based, and solution-based pricing models. Introducing such constructs would provide greater flexibility to enterprises and more options to choose from as per their requirements
- Clients expect PMG to provide users with the ability to generate process documents, offer greater out-of-the-box controls, and enhance scalability of the platform

SS&C Blue Prism (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Strengths

- SS&C Blue Prism through its process orchestration offering, Chorus BPM, envisions helping enterprises optimize their business processes, visualize all the activities performed by humans and digital workers, analyze the customer journeys, and integrate with other intelligent automation technologies
- It offers a drag-and-drop interface, which enables users to create new workflows as well as update the existing workflows. Its case management feature allows the user to dynamically change the way a process works or to create additional tasks within the case
- The platform supports different types of rule models such as conditional logic, decision tables, and decision trees, which help users to configure business rules of varying complexity. It uses a standard DMN notation for modeling decision rules. Clients have also highlighted business rules management as one of its key strengths
- It offers a pre-built repository of business rules to help users with faster configuration for common use cases. It allows the creation of custom business rules with its business process rules engine
- SS&C Blue Prism uses active learning, a subset of ML, for generating custom predictive rules. Active learning also helps to train the model quickly and accurately and is based on business logic and does not require any statistical knowledge
- Its drag-and-drop interface allows citizen developers to design forms, websites, and applications. It offers kick-starter templates and pre-built forms to its clients and allows users to upload and download forms to/from the Digital Exchange, an asset marketplace for the SS&C community
- Along with offering support for application development, the platform also enables users to test their applications before publication. Its Process Test Automation tool enables users to auto-generate test scenarios based on historical data
- It provides out-of-the-box dashboards for process monitoring and insights along with the option to export these dashboards in Microsoft Word or PowerPoint format. It also allows users to add and manage widgets to these dashboards
- SS&C Blue Prism's algorithms automatically optimize and balance workloads across the human and digital workforce by retrieving the highest priority task and assigning it to a person who is eligible to perform the task
- Clients have highlighted product vision and roadmap, process modeling, exception handling, and integration with complementary technologies as the key strength areas for SS&C Blue Prism

SS&C Blue Prism (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Limitations

- The majority of SS&C Blue Prism’s process orchestration clients are based out of North America and the UK. It has a relatively low presence in other key geographies such as Continental Europe, APAC, and MEA
- SS&C Blue Prism’s process orchestration portfolio primarily includes clients from BFSI and healthcare & pharma industries. It has relatively limited experience of serving enterprises in other verticals such as hi-tech & telecom, manufacturing, CPG & retail, and government & public sector
- There is scope to improve its low-code/no-code UI development capabilities by adding features such as a step-by-step wizard to help enterprise users create business applications
- With respect to process monitoring and analytics, features such as the availability of AI-/ML-based models for predictive maintenance of the processes is currently in the roadmap. Reference clients also indicated that there is scope to further improve its process monitoring and analytics capabilities
- While SS&C Blue Prism provides the ability to send reminders and notifications to users for pending items, it does not offer the AI-based capability to automatically calculate the right interval for follow-up based on the anticipated due dates and delays
- SS&C Blue Prism currently offers a user-based licensing model. There is scope to provide flexibility in terms of pricing models by offering multiple options such as process-based, solution-based, or hybrid constructs, to its clients
- The platform is developed on microservices architecture; however, it does not support multi-tenant, containerized deployments. Adding these could help improve the product’s scalability and reduce the downtime for feature upgrades
- Reference clients indicated the scope to simplify product upgrades. Reference clients have also highlighted product training and support as one of the key areas of improvement
- Clients expect further enhancements in the ability to share business process models with other users within the organization and the ability to trigger alerts/notifications via email for any violations in security protocols

Ultimus (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Strengths

- The Ultimus Digital Process Automation Suite focuses on broader process automation and speed of deployment. Its key investments areas include enhancing DevOps and composition curator tools and leveraging AI/ML in solution development and support process
- The platform offers pre-defined modeling templates for process overview diagrams and detailed flowcharts. It also has the capability to simulate the process and evaluate the performance of a process model by defining 'what-if' scenarios
- It offers a low-code/no-code design environment for business rules management along with a pre-built library/repository of business rules. It also supports generating custom predictive rules generation using AI/ML
- Ultimus' platform allows enterprise users to customize pre-built form templates. It supports responsive forms that are multi-device compatible and has an app store/repository for collaboration and reuse of applications developed by business users
- Its hybrid workforce management features include AI-based task allocation to both digital and human workers. It can auto check-in and follow-up based on due dates and delays. It also offers a dashboard to provide real-time visibility into human and digital workforce operations
- The platform offers the ability to create customized dashboards based on user requirements / user-defined queries, can recommend automation opportunities, and provide insights around the impact on defined KPIs and business metrics. Users can also generate reports for tracking operational metrics such as workloads, SLAs, TATs, and AHTs
- It has pre-built connectors with several enterprise applications, automation solutions, third-party databases, third-party BI tools, and process mining platforms to ensure seamless integration and interoperability
- The platform offers in-house credential vault and out-of-the-box integration with a specialized provider of credential vaults (e.g., CyberArk and Azure key vault). It can also redact specific PII data in documents either temporarily or permanently ensuring security and compliance
- Its product architecture is developed using loosely-coupled microservices. It offers flexibility in deployment as it can be deployed on-premise, on public and private cloud, and is also available as a SaaS offering
- Ultimus offers flexibility in the commercial models deployed for its clients. Apart from the widely used pricing models such as user-based and process-based, it offers solution-based, server-based, and various hybrid models as well

Ultimus (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Limitations

- Ultimus platform’s business rules management features does not include the ability to discover existing business rules and a dashboard to monitor the execution performance of business rules
- There is scope to improve the value proposition of its platform by adding advanced process modeling features such as a syntax detector to identify any errors in the process diagram or process map
- Though the platform supports process-centric business application development, the availability of a step-by-step wizard to help end users create business applications is in the roadmap
- While the platform can create customized dashboards and detect bottlenecks in the process, it does not have advanced analytics features such as the ability to recommend automation opportunities and give insights around the impact on KPIs
- Currently, the platform architecture does not support multi-tenant deployments. Further, it cannot be deployed in containerized form, which further challenges the scalability of the platform
- Ultimus does not provide an online training portal and has relatively few training partners, thus limiting the flexibility and accessibility of its product training for clients
- It does not currently offer self-paced training modules, online certification courses, free training modules, and separate training courses for different user roles such as business analysts and data scientists
- The platform does not have an online user community and support forum that can help developers discuss and connect with other developers with shared interest and objectives

06

Enterprise sourcing considerations

- Aspirants

 - Bonitasoft
 - JobRouter
 - Kissflow

Bonitasoft (page 1 of 2)

Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Strengths

- Bonitasoft offers an open source and extensible platform for business process automation and optimization. It envisions to address customers' short-term goals in terms of automation of core and critical business processes and long-term goals by aligning IT with business strategies
- Within the Bonita platform, Bonita Studio offers a drag-and-drop visual interface to design processes. It supports dynamic process design and offers process simulation capabilities where process designers can define 'what-if' scenarios to simulate process and evaluate process performance
- The platform enables users to add custom business rules through scripting and a visual drag-and-drop interface. It also offers various types of rule models such as logical expressions, mathematical expressions and decision tables. The business policies and rules can also be shared across projects, thereby enabling better collaboration
- Bonitasoft offers a drag-and-drop interface to create electronic forms for end users. The forms can be enhanced by creating data lookups using database connections and adding file attachments and e-signatures. It also allows users to build dynamic forms with multi-device compatibility
- It provides a low-code/no-code interface for application development with multi-device compatibility of developed applications. It facilitates collaboration between developers by offering application development lifecycle management. An app store is also available for reusability of applications
- It also offers hybrid workforce management functionalities such as the ability to send reminders and notifications for pending tasks, follow-up based on due dates and delays, a control center for centralized management of digital and human workers, and dashboards for real-time visibility into human and digital workforce operations
- It supports monitoring of the progress of processes against defined KPIs/metrics, creating customized dashboards with widgets, and helps detect bottlenecks and identify automation opportunities. It also offers operational reports for visibility on workloads, SLAs, TATs, AHTs, productivity, and utilization metrics for the human and digital workforce
- The platform offers pre-built connectors for common enterprise applications, RPA platforms, database platforms, and process mining solutions for better interoperability
- It offers all hosting options such as on-premise, private cloud, public cloud, and hybrid of on-premise and cloud. The product architecture is based on loosely-coupled microservices and can be deployed in containerized form, thus enhancing the scalability of the platform

Bonitasoft (page 2 of 2)

Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Limitations

- While Bonitasoft’s clients are fairly spread across Continental Europe, North America, and LATAM, it has relatively limited presence in other geographies such as APAC, the UK, and MEA
- Bonitasoft majorly caters to BFSI, government and public sector, and hi-tech & telecom industries. Its experience in serving companies in other key verticals such as healthcare and pharma, CPG & retail, and manufacturing is relatively untested
- Its client portfolio is skewed toward midsize and large enterprises with revenue greater than US\$1 billion. It has limited experience in serving clients from SMBs and small enterprise segments
- There is further scope to improve the process design and management capabilities by offering pre-defined templates of process diagrams and flowcharts to help users get a quick head start in terms of process modeling
- While Bonitasoft does provide business rules and decision management capabilities, they can be further enhanced by adding features such as the ability to define rules in the form of decision trees and a low-code/no-code user interface for generating AI-/ML-based predictive rules
- The platform currently lacks low-code/no-code user interface development features such as pre-built form templates for common use cases, availability of UI to assign tasks in real-time, and AI-based automated testing of developed applications
- While Bonitasoft does provide pre-built connectors to integrate with enterprise systems, databases, RPA, and process mining solutions, it currently lacks out-of-the-box connectors for BI tools such as Microsoft Power BI, Qlik, and Tableau
- There is further scope to improve process analytics capabilities by offering AI-/ML-based models for predictive maintenance of the processes
- While Bonitasoft does provide integration with complementary capabilities such as RPA, conversational AI, and API automation, integration with other key technologies such as IDP and task mining is not available
- Bonitasoft does not provide an online training portal and has relatively few training partners, thus limiting the flexibility and accessibility of its product training for clients

JobRouter (page 1 of 2)

Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Strengths

- JobRouter focuses on enabling people and organizations to create modern digital workflows through its low-code process orchestration platform to provide scalability and flexibility for process and document automation. It is also investing to build an ecosystem where its community members can collaborate and leverage the developed forms and applications
- Its process designer currently offers a drag-and-drop interface to create and document process maps. It supports dynamic process design where users can make changes in real time. The process maps are compatible with BPMN 2.0 standards and JobRouter also offers pre-built templates for process diagrams
- JobRouter’s platform allows users to configure various types of rule models such as conditional logic, mathematical expressions, and decision tables. It provides a flexibility in building custom rules through its drag-and-drop interface and provides support for custom scripting. It allows multiple users to modify business rules and manage these rules across projects
- The platform allows users to create digital forms with its drag-and-drop interface that has various controls and data types. It offers pre-built form templates for common use cases that are available in the marketplace
- It provides users the ability to create process-centric applications that are compatible with multiple devices. It also offers an app store/repository for collaboration and reuse of apps developed by business users
- It offers integrated document management capabilities, which include functionalities such as document creation and archiving, audit trails, and audit-proof archiving
- JobRouter leverages its partner ecosystem and its own expertise to provide package solutions for use cases such as business continuity management, compliance with GDPR regulations, invoice processing, and employee onboarding
- Its analytics and reporting dashboard helps monitor the process performance and track productivity and utilization metrics for the human and digital workforce. It also provides the ability to create customized dashboards
- JobRouter also offers a risk-analysis feature where users can define their assets (contracts, source code, etc.) and define the risks, and the platform will provide recommendations on how to reduce those risks
- It has a free online training portal, JobRouter Academy, which includes video tutorials, role-based training and certification programs, and self-paced training modules. It also offers technical support in the form of direct support and through resellers/partners to help resolve customer issues
- Clients have highlighted the low-code approach for building workflows, ease of integration with other enterprise systems, and language support as its key strengths

JobRouter (page 2 of 2)

Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Limitations

- JobRouter’s process orchestration clients are based out of Continental Europe. Its experience in serving enterprises in other geographies such as North America, the UK, LATAM, MEA, and APAC is relatively limited
- The majority of JobRouter’s clients are SMBs and small enterprises with less than US\$1 billion in annual revenue; its client base in the midsize and large enterprise segments is limited
- The platform lacks process design features such as the ability to record tags to specific cases or process steps for collaboration and the ability to export to interoperable formats such as Visio, XPD, or BPMN 2.0. It also does not provide the ability to generate process-based manuals for training, certifications, and audits
- While JobRouter offers support for the creation of different types of rule models, it lacks support for the decision trees model. Features such as a pre-built repository of business rules, the ability to discover existing business rules, and a low-code/no-code design environment for generating custom predictive rules using AI/ML are currently not available in the platform
- Low-code/no-code application development features such as AI-based automated testing of developed applications and application development lifecycle management to enable collaboration among developers are currently not available
- In terms of hybrid workforce management, offering features such as AI-based task allocation for both digital and human workers, the ability to auto check-in to calculate the right interval for follow-up, and the ability to synchronize tasks with Microsoft Planner and Google Calendar, would further increase the value proposition for enterprises
- The platform does not provide few monitoring and analytics features such as the ability to recommend automation opportunities and their impact on defined KPIs and business metrics and AI-/ML-based models for predictive maintenance of the processes
- The platform lacks integration with complementary capabilities such as process mining, task mining, API automation, and conversational AI due to a lack of investments in either developing these in-house or forging partnerships with third-party providers
- JobRouter offers fixed-fee pricing and hybrid of user-based and process-based pricing models. It lacks other prevalent options such as user-based and process-based pricing models. Introducing such constructs would provide greater flexibility to enterprises and more options to choose from as per their requirements
- Clients highlighted that there is scope to improve web and mobile application development features, provide integration with Microsoft Teams, provide two-factor authentication for the mobile app, and offer an online marketplace to access reusable assets

Kissflow (page 1 of 2)

Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Strengths

- The Kissflow Work platform offers low-code/no-code modules to cater to business and IT users. While it is investing into implementing the process governance module, plans for expansion in the US, Europe, and LATAM is in the roadmap
- Kissflow has a presence in almost all geographies and has experience in serving buyers in diverse range of industries and process areas including BFSI, healthcare, government & public sector, and manufacturing sectors
- The platform has the capability to simulate process and evaluate the performance of a process model by defining 'what-if' scenarios. It also has an additional process debugging feature, which allows process designers to test a process before publishing it as a new version
- Its business rules management features include the ability to discover existing business rules and add custom business rules either through drag-and-drop interfaces or through custom scripting. These rules can be modified by multiple users based on the enterprise requirements
- Kissflow's platform offers the ability to create process-centric business applications using a drag-and-drop visual interface. These applications are multi-device compatible and can run on devices such as mobiles and tablets. It also offers an application development lifecycle management system to enable collaboration among the developers
- Its hybrid workforce management features include the ability to optimize and balance workloads between the digital workforce and human workforce through built-in algorithms. Its out-of-the-box dashboard provides real-time visibility into human and digital workforce operations
- The platform offers the ability to create customized dashboards based on user requirements / user-defined queries. Users can generate operational reports for visibility on workloads, SLAs, TATs, and AHTs
- The platform provides role-based access to the system to enhance the security aspect of the process. Process designers can also maintain an audit trail of all activities within each process/case to minimize compliance risk
- Its platform is developed using loosely-coupled microservices and can be deployed in a containerized form, which enhances scalability and reduces downtime for feature upgrades. It also supports multi-tenant deployments
- Clients appreciate Kissflow's customer support, speed of deployment, and the ease of use of its platform. They have highlighted the low-code interface of the Kissflow platform, metric traceability, and mobile compatibility as the key areas of strengths

Kissflow (page 2 of 2)

Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
									

Limitations

- The majority of the client base for Kissflow are small buyers and SMBs. They have relatively low experience in serving clients with annual revenue greater than US\$1 billion
- Although it supports dynamic process design, pre-defined modeling templates for process overview diagrams and detailed flowcharts are currently not available. Clients also expressed the need for data import and export capabilities within the platform
- Kissflow does not provide a pre-built library/repository of business rules and a low-code/no-code design environment for generating custom predictive rules. The platform also does not allow to manage or share business policies and rules across projects
- The availability of an app store/repository for collaboration and reuse of applications developed by business users is in the roadmap. There is scope to add advanced application development capabilities such as AI-based automated testing of developed applications. Clients also indicated that there is scope to further improve its application development capabilities
- The value proposition of the product is not very strong for enterprises looking for advanced hybrid workforce management. Features such as AI-based task allocation for both digital and human workers; the ability to auto check-in; the ability to start, schedule, or stop robotic processes on-demand; and control centers for centralized management of digital and human workers is currently not available
- The platform lacks advanced monitoring and analytics features such as recommending automation opportunities and providing insights around the impact on defined KPIs and business metrics. Clients also expect Kissflow to offer better report-generation functionalities
- Kissflow does not offer pre-built connectors with any enterprise applications, automation solutions, databases, BI tools, or process mining solutions
- It does not have an inbuilt credential vault or out-of-the-box integration with a specialized provider of credential vaults (e.g., CyberArk and Azure key vault). There is scope to add other security features such as the ability to redact specific PII data in documents either temporarily or permanently
- The platform is currently hosted on the public cloud and lacks on-premise and private cloud deployments
- Kissflow offers user-based pricing and lacks other options such as process-based, solution-based, and hybrid pricing models. Introducing such constructs would provide greater flexibility to enterprises and more options to choose from as per their requirements
- Clients have highlighted the need to improve collaboration and management features such as automated messaging and notifications. They also expect the integration of its platform with other complementary technologies such as RPA, process mining, and task mining

07

Appendix

- Glossary
 - Research calendar
-

Glossary of key terms used in this report (page 1 of 2)

Artificial Intelligence (AI)	Ability of machines to use cognitive computing to mimic human intelligence, such as visual perception, speech recognition, decision-making, and language translation
BPMN 2.0	Business Process Model and Notation (BPMN) 2.0 is a graphical representation for specifying business processes in a business process model. It helps to clearly determine the flows and business processes designed in a process diagram
Business Intelligence (BI)	Technologies, applications, and practices for collection, integration, analysis, and presentation of business information
Buyer	The company/entity that purchases outsourcing services from a provider of such services
Conversational AI	Conversational AI is a computer-generated virtual character that can have a conversation with human customers and take decisions. Alternative term for chatbots or virtual assistants
DMN™	Decision Model and Notation (DMN) is a modeling language and notation for the precise specification of business decisions and business rules. It provides a mechanism to model the decision-making associated with processes and cases
FEEL	Friendly Enough Expression Language (FEEL) is an expression language defined by the OMG DMN specification. These expressions define the logic of a decision in a DMN model
FTEs	Full-time Employees on the rolls of the company
Intelligent Document Processing (IDP)	IDP is a software product or solution that captures data from documents (e.g., email, text, PDF, and scanned documents), categorizes, and extracts relevant data for further processing using AI technologies such as computer vision, OCR, Natural Language Processing (NLP), and machine/deep learning
Internet of Things (IoT)	IoT is the network of physical devices, vehicles, home appliances, and other items embedded with electronics, software, sensors, actuators, and connectivity, which enables these things to connect, collect, and exchange data
IT Service Management (ITSM)	ITSM is a combination of a set of defined policies, processes, and methods for delivering IT products and services
KPI	Key performance indicators for processes, services, products, or solutions
Machine Learning (ML)	A type of artificial intelligence that provides computers with learning capabilities without explicit programming

Glossary of key terms used in this report (page 2 of 2)

Natural Language Processing (NLP)	A machine’s ability to interpret human languages
Optical Character Recognition (OCR)	A technology within computer vision that involves the recognition of printed characters using computer software
Process-based pricing	Pricing model based on the number of processes being analyzed
Process mining	Process mining solutions capture process-related information from event logs generated by enterprise systems, such as ERP, CRM, and SCM, to discover and analyze as-is processes
RoI	Returns attained from an investment
Robotic Process Automation (RPA)	RPA refers to a type of rules-based automation technology that helps automate repetitive tasks by mimicking a user’s activities. It is non-invasive and typically interacts with a computer-centric task/process through the User Interface (UI) of the underlying software applications
Software-as-a-Service (SaaS)	SaaS is a software licensing and delivery model wherein the software is hosted centrally by a third-party provider and is made available to customers over the internet. It is also referred to as on-demand software
Structured data	Structured content is one that conforms to the pre-defined structure in terms of tags to separate semantic elements and enforced hierarchies of records and fields. Moreover, the placeholders for the content have a pre-defined sequence
Task mining	Task mining captures process-related information through UI logs to provide insights into the tasks and activities involved in executing a process
User-based pricing	A pricing model based on the number of users using the platform; additionally, few providers also price them based on the frequency of usage by the user; and also, some providers classify the type of users and price them differently
Unstructured data	Unstructured content refers to information that either does not have a pre-defined data model or is not organized in a pre-defined manner. Unstructured information is typically text-heavy, but may contain data such as dates, numbers, and facts as well
Vertical-specific business processes	Vertical-specific business processes refer to those processes that are specific to a department within an organization and are often directly related to the key revenue-earning business. Examples include a lending process in the case of the banking industry and claims processing in case of the insurance industry

Research calendar

Service Optimization Technologies (SOT)

Published Planned Current release

Reports title	Release date
Stepping into the Era of Digital Workers – Robotic Process Automation (RPA) State of the Market Report 2022	December 2021
Defining Attended RPA – What to Look for in an Enterprise-grade Attended RPA Solution?	March 2021
Intelligent Process Automation (IPA) – Solution Provider Landscape with PEAK Matrix® Assessment 2022	March 2021
Intelligent Document Processing (IDP) – Technology Provider Landscape with Products PEAK Matrix® Assessment 2022	May 2021
Process Mining – Technology Provider Landscape with Products PEAK Matrix® Assessment 2022	June 2021
The Business Case for Process Mining – From Evaluation to Value Realization	June 2021
A New Era of Business Process Innovation – Intelligent Processes Automation (IPA) State of the Market Report 2022	June 2021
Intelligent Document Processing (IDP) – State of the Market Report 2022	July 2022
Task Mining – Technology Provider Landscape with Products PEAK Matrix® Assessment 2022	August 2022
Wear an Analytical Lens to Optimize Processes – Process Mining State of the Market Report 2022	September 2022
Task Mining – State of the Market Report 2023	October 2022
Robotic Process Automation (RPA) – Technology Provider Landscape with PEAK Matrix® Assessment 2023	October 2022
Process Orchestration – Technology Provider Landscape with PEAK Matrix® Assessment 2023	November 2022
Process Orchestration – Technology Provider Compendium 2023	Q4 2022
Robotic Process Automation (RPA) – State of the Market Report 2023	Q4 2022

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everestgrp.com/blog

Dallas (Headquarters)

info@everestgrp.com
+1-214-451-3000

Bangalore

india@everestgrp.com
+91-80-61463500

Delhi

india@everestgrp.com
+91-124-496-1000

London

unitedkingdom@everestgrp.com
+44-207-129-1318

Toronto

canada@everestgrp.com
+1-647-557-3475

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