Vendor Landscape: BPM Platforms For Digital Automation

Landscape: The Business Process Management Playbook

by Rob Koplowitz
February 10, 2017

Why Read This Report

As organizations continue to pivot toward customer-obsessed operating models, application development and delivery (AD&D) professionals have seen business process management (BPM) morph into an important enabler of digital transformation. Vendors are adapting their software platforms to support emerging use cases, and new players are disrupting the market as the ROI discussion shifts from cost reduction to customer experience. This report outlines the new digital requirements for BPM platforms and provides a framework for navigating a crowded vendor landscape.

This is an update of a previously published report; Forrester reviews and revises it periodically for continued relevance and accuracy.

Key Takeaways

BPM Priorities Have Overwhelmingly Shifted To Customers
Organizations considering BPM initiatives are doing so to serve customers, not cut costs. Among our survey respondents, 64% are digitizing processes to support serving their customers.

BPM Vendors Are Responding To Customer Centricity
BPM vendors respond to changing priorities by shifting their product strategy toward technologies that support rapid development and deployment of customer-facing applications. Low-code development and design thinking are the pillars of these efforts.

Innovation Is At The Forefront Of Vendor’s Strategies
In addition to low-code, cloud, and mobile enablement, BPM vendors are investing heavily in artificial intelligence (AI) to drive better user experiences. AI elements show up in new interfaces such as voice and chat, cognitive expertise sources to support processes, and machine learning to drive process optimization.
Vendor Landscape: BPM Platforms For Digital Automation
Landscape: The Business Process Management Playbook

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February 10, 2017

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Digital Transformation And Customer Experience Frame The New Business Case For BPM

The Forrester Wave™: BPM Service Providers, Q4 2016

The New Discipline Of Digital Business Automation
Digital Transformation Is Driving BPM Toward Customers, Fast

Customers are now at the forefront of business technology priorities. Along with many other elements of digital transformation, BPM software systems are repositioning to address enterprises' biggest opportunities in this shifting landscape. The most prominent changes come from supporting emerging digital work patterns, digital devices, and digital architectures. As their companies' emphasis moves from internal systems and processes to customer-facing activities, AD&D professionals’ priorities for BPM software and practices are aligning accordingly. Increasingly, BPM and process change are focusing on facilitating cross-channel collaboration among employees, customers, partners, and “things.” A new strategic picture of BPM software requirements has emerged as a result (see Figure 1).

![FIGURE 1 Digital Business Is Reshaping The Traditional BPM Landscape](image)

<table>
<thead>
<tr>
<th>Traditional BPM</th>
<th>BPM for digital business</th>
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</thead>
<tbody>
<tr>
<td>Driver</td>
<td>Remove cost</td>
</tr>
<tr>
<td>User</td>
<td>Primarily employees</td>
</tr>
<tr>
<td>Experience</td>
<td>Standardized, developer-driven</td>
</tr>
<tr>
<td>Interfaces</td>
<td>Users come to the system</td>
</tr>
<tr>
<td>Process approach</td>
<td>Designed for standardization (rigid)</td>
</tr>
<tr>
<td>Modelling approach</td>
<td>Heavy upfront investment</td>
</tr>
<tr>
<td>Vendor focus</td>
<td>Platform sales</td>
</tr>
<tr>
<td>Development environment</td>
<td>Designed for professionals, dependent upon developers and analysts</td>
</tr>
</tbody>
</table>

New Digital Experience-Focused Channels Support Customer Centricity

Imagine asking a customer to log into any of your internal systems to access information, request a service, place an order, request status, or do any of the hundreds of things they might need to do. Without knowing your systems, it’s safe to guess that they’d vote with their feet and find another supplier. However, these systems and processes are the lifeblood of your organization, and the opportunity to re-engineer them with an eye toward customer obsession could be the difference between thriving and becoming a cautionary tale. With this guiding principle in mind, organizations have repositioned BPM from an internal focus to a vital part of their customer-facing strategy (see Figure 2).
But this means vendors can no longer deliver user experiences on proprietary architectures; instead, they must embrace interfaces that meet customers on their terms. This shift is not surprising, given that BPM customers are identifying priorities like customer journey mapping and design thinking well ahead of more traditional priorities that map to internal processes, such as Lean/Six Sigma (see Figure 3). AD&D leaders involved in setting BPM platform strategies are now looking for:

› **Meeting users on their terms.** The days of building a complex interface and expecting people to use it without complaining are over. Employees who have to use it will complain; all other employees — and certainly customers — will vote with their feet. Services must now extend to smartphones, tablets, social media, and, increasingly, chat and voice interfaces. While some companies focus only on putting a mobile interface in front of existing processes, Forrester sees pioneering companies going further to re-engineer their core business processes to take advantage of new interaction models. For example, a global insurance provider has experimented with voice interfaces to its BPM solution through Amazon Alexa.

› **New human-to-computer interfaces.** We’ve moved from the era of web interfaces to mobile experiences that open up new possibilities, and now we’re on the verge of voice- and chat-based interactions. As these new paradigms become increasingly prominent in consumers’ experience, new interaction models and process re-engineering opportunities will emerge. For example, a global insurance provider built an interface for Appian that allowed an administrator to query the system and enabled voice commands to handle tasks such as queue reallocation.

› **Cognitive guidance.** A key tenet of BPM is to determine, enable, and sometimes take the next best action. In some instances that require human involvement, the idea of introducing a reliable and tireless “thinking machine” into the process that could provide insight and recommendations for human approval holds compelling promise. While still in its early stages, this kind of augmented intelligence is evolving rapidly. For example, one vendor we interviewed will introduce machine learning in 2017 that will advise healthcare professionals about diagnoses or treatment options.

› **Cross-channel integration to drive critical initiatives.** To drive innovation, companies need to collaborate more closely with customers and partners. In some cases, this means allowing partners and customers to build and refine solutions on top of core business process and systems. For example, one global pharmaceutical company opened up its core processes and systems to allow customers and partners to build custom apps that used clinical data to model drug interactions.
"Which business processes are being re-engineered to better support digital technologies?"
(Please select top two)

<table>
<thead>
<tr>
<th>Process</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer servicing</td>
<td>64%</td>
</tr>
<tr>
<td>Customer onboarding</td>
<td>52%</td>
</tr>
<tr>
<td>Sales-related</td>
<td>35%</td>
</tr>
<tr>
<td>Order management</td>
<td>26%</td>
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<tr>
<td>Supply chain and partner-facing</td>
<td>26%</td>
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<tr>
<td>Accounting and financial</td>
<td>25%</td>
</tr>
<tr>
<td>Human resources</td>
<td>12%</td>
</tr>
</tbody>
</table>

Base: 215 business process professionals
Source: Forrester’s Q2 2016 Digital Business Automation Survey
Digital Processes Demand Greater Speed And Agility

Since Frederick Winslow Taylor pioneered industrial efficiency at the turn of the last century, process excellence has always focused on standardization and efficiency. The industrial approach, however, struggles when processes are more ad hoc or require extensive human involvement. Needless to say, such variables are prominent characteristics when customers becomes part of a process. First off, you can’t compel customers to follow your standard process. Second, customer journeys have too many potential variables that change too often to live in the rigid world of traditional process automation. Thus, instead of standardization, digital promotes mass customization and tailoring. And rather than zeroing in on efficiency, digital places a higher priority on agility and the ability to adapt operating models and systems. The key requirements today:
› **Low-code development.** Traditional BPM tools and methods require upfront planning, complicated development, and extensive change management. The projects were characterized by high cost and high risk, but did hold the promise of significant operational efficiencies. In a traditional organization looking to drive out costs, this was a worthy goal. However, in a new world focused on serving customers, processes change rapidly, and speed to market is king. Enter low-code, one of the biggest potential disruptors and opportunities for traditional BPM vendors. Emerging platforms offer rapid application prototyping and development. Some even allow businesspeople to participate more deeply in the development process — and perhaps build applications themselves.

› **Guardrails and governance.** With an increased focus on application development, process teams need improved functionality to apply design best practices and monitor performance. Some vendors now embed design guardrails that alert developers and solution architects when users are not following best practices. These features help accelerate skill development and training on the platform and prevent defects down the line. Vendors are also embedding support for live-trial development, which allows developers to review functionality and monitor application performance while still in the development environment.

› **Data integration and management.** Data integration is always a challenge, and BPM initiatives are no exception. BPM solutions struggle to maintain data integrity across in-flight business processes and source systems. To resolve this, teams embed data integration components and data flows directly into process models, which makes the models difficult for business users to follow. Virtual data management is becoming a key ingredient for BPM and supports modeling data sources across different systems of records and reusing these data models across different process applications. This approach hides some of the complexity for integrating business processes and data sources. Access to critical data sources may be an important consideration for a BPM solution.

### Six Questions To Navigate The Field Of BPM Players

Despite vendor acquisitions and consolidation, the BPM software space is still crowded, with new entrants and adjacent offerings flowing in regularly. The current tension comes from low-code platform vendors adding process capabilities just as traditional BPM vendors are pushing toward the low-code market. Of course, this makes it difficult to identify which vendors are best suited to support a company’s specific process needs. Forrester recommends that AD&D pros narrow the field of BPM software vendors by asking themselves:

1. **Will we extend processes to internal and external roles?** Given the data about BPM's role in digital transformation and customer-facing applications, the answer to this question willing increasingly be “yes.” In fact, if it’s not “yes,” you should probably be asking yourself “why not?” Some platforms are better suited for supporting internal workflows and workers, while others have a track record of being
extended to support customers. The answer to this question will have many implications, including on pricing and licensing, since many vendors price their platforms per user — a model that does not allow for the critical customer-facing use cases.

2. **How much customization will we need for user interfaces?** Are you planning to use the vendor’s out-of-the-box interfaces for completing work tasks? Or are you planning to use a custom-developed or third-party application as the front end? Many BPM vendors want to own the front end and prefer to serve as the primary user interface for completing work. This can make it difficult to integrate the BPM engine with other front-end or mobile apps. If you need to support a custom front end, consider BPM solutions that provide workflow and process engines that can run heedless of the front end or offer the customization options you require. Open source vendors and developer-friendly platforms are usually good candidates to evaluate for such configurations.

3. **How deep is our process development talent pool?** Developer skills are usually a hidden requirement for BPM evaluations. Most teams assume they have talented developers and solution architects who can quickly ramp up on a new platform. However, implementing BPM requires a fine balance of business and technical skills, and it can take months to build proficiency from a small pool of developers and architects. Be sure to consider vendors that have large and diverse partner ecosystems, including partners that understand specific horizontal or vertical requirements. Also consider embracing a low-code model if it will meet your needs while hiding complexity and lowering risk.

4. **What is the scope of our future digital transformation efforts?** The best practice for adopting and scaling BPM implementations is to start with small wins connected to larger enterprise challenges. However, many teams struggle to scale quickly after achieving the first few project wins. To keep quick wins from turning into long-term nightmares, evaluate big-picture requirements for the BPM platform and build worst-case estimates for how the platform will need to scale in terms of number of users, types of process solutions, and transaction volumes. It also helps to model out how many different process projects you might need to develop in parallel on the platform. It is also worth considering whether multiple products could serve different requirements. For example, could a low code, cloud-based solution fit more basic use cases while a traditional on-premises suite approach took on more complex applications?

5. **What deployment options do we prefer?** Deploying a solution to the cloud could have cost, maintenance, and time-to-market advantages. Cloud-deployed solutions are increasingly available from vendors, and customers are becoming more comfortable deploying in this model. Does a cloud solution meet the organization’s requirements for privacy, security, data location, integration, and regulatory compliance? The answer to this question may compel you to an on-premises or hybrid solution.

6. **Where are we placing strategic bets?** BPM is in the midst of a profound shift. The drivers that shaped the emergence and maturation of the space are fading, and nowhere is that better demonstrated than in the slowing revenue growth and recalibration of vendors’ messaging, strategy, and investments. For example, we see Pega moving toward sales, customer service, and marketing solutions. Other vendors such as TIBCO and IBM are making a big bet on low-code.
Bizagi has invested in developer-accessible AI components that can help predict the next-best step in a process. In times of change, ensure that the vendor you choose is investing in a strategy that supports your organization’s long-term goals.

Exploring The Three Categories Of BPM Platform Vendors

In place of preconfigured and all-encompassing BPM suites, Forrester sees user organizations embracing platforms that offer extensible, plug-and-play configurations with different back-end application frameworks and front-end development environments. Although the evolving landscape for BPM platforms is sprawling and diverse, we are able to organize vendors into three high-level categories based on how broadly or deeply their platforms focus on specific enterprise challenges (see Figure 4):

› **Enterprise stack providers.** Large vendors with diverse portfolios offer solutions that can serve a majority of an organization’s needs through pre-integrated or easily integrated configurations. Many of these vendors are prominent middleware or solution vendors.

› **Application platform vendors.** These vendors offer highly integrated platforms, which their customers use to develop complex end-to-end solutions. Many of these vendors have placed a premium on providing tools with a common development and deployment experience to improve speed and lower training costs.

› **Specialists for specific market niches.** These vendors provide solutions that are aligned with particular vendor ecosystems or market opportunities. In this analysis we focus on three categories, Microsoft-focused, open source, and domain specialists.

**FIGURE 4** The Emerging Landscape For BPM Platforms Cuts Across Three Categories

![Enterprise stack, App platform, Specialist categories with vendor lists](image)

Note: This is only a representative list of the BPM market and is not intended to be exhaustive.
Enterprise Vendors Leverage Stacks For Digital Change

Large enterprise software vendors combine components from different parts of their software portfolios to cover a wide range of process use cases. Most of these vendors evolved their BPM platforms from the middleware software category and tend to provide the strongest support for deep integration with back-end systems of record, which enables complex event monitoring, big data, and business analytics scenarios. Representative enterprise-stack vendors include:

- **IBM.** IBM’s BPM offering targets programs and initiatives focused on continuous process improvement and collaboration across different operational roles. The platform includes different components that cover collaborative modeling, process design and execution, business rules, and business activity monitoring. The platform can also extend to work with other components across the IBM software portfolio. Over the past few years, IBM has introduced dynamic case management and mobile features that support emerging digital use cases. In keeping with one of IBM’s key strategic initiatives, it entered the cloud BPM race with IBM Business Process Manager on Cloud and with Blueworks Live, which in addition to being cloud-based, is also designed for business users with a low-code, rapid development environment.

- **OpenText.** After numerous acquisitions in the BPM space, including Metastorm and Global 360, OpenText has placed its big bet on the legacy Cordys offering, now called Process Suite. While Open Text’s offering is broad and covers most of the BPM waterfront, its sweet spot is in case management. OpenText’s BPM platform provides an enterprise service bus (ESB) that enables web-services-based integration across different applications and methods. Additionally, the platform provides prebuilt integrations with OpenText’s existing enterprise content management (ECM) functionality. Open Text has embraced low-code rapid development through an information-driven design approach.

- **Oracle.** Oracle’s BPM platform targets process teams that need deep integration to back-end systems and web services. The platform provides out-of-the-box connectivity to other Oracle middleware components and packaged applications. More recently, Oracle revamped its cloud-based modeling environment to improve usability for business analysts and nontechnical process analysts. The cloud-based environment (Oracle Process Cloud Service — PCS) supports complete model-to-execution-to-monitoring, and customers can use it to build and deploy full-featured business process applications. Oracle also provides a growing catalog of horizontal and vertical process accelerators, such as insurance claims management and complaints management. Oracle Process Cloud Service, cloud-based, low-code (in fact, it claims a “zero code” declarative environment), aims at business users.

- **Software AG.** Software AG offers a broad portfolio of BPM capability that covers the spectrum of process and case-management use cases and scenarios. For process design, development, and automation, Software AG provides both a web-based modeling and analysis environment and a development environment for implementing applications and solutions. Its broad offering...
includes webMethods BPMS for highly scalable, complex enterprise applications and webMethods AgileApps for business-driven situational applications. The two are designed to integrate and work together, and both emphasize mobile engagement for BPM professionals with a series of native mobile apps.

› **TIBCO Software.** Two years after the Vista Partner acquisition, TIBCO’s BPM platform continues to be a strong anchor in the vendor’s middleware stack, providing a wide array of digital automation capabilities along with integration with other middleware components such as TIBCO’s ESB and event-streaming platforms. The core platform targets process-development teams that demand high scalability for handling large volumes of transactions. In addition to the core process design and development platform, TIBCO provides a web-based collaborative modeling environment that targets business. The collaborative modeling environment helps teams document existing business processes and share process models as standard operating procedures and policies. During our research, TIBCO was releasing a preview of a new addition to its BPM family that will be cloud-based and offer low-code process-application development to business users.

**App Platform Vendors Provide End-To-End Solutions For Process Apps**

App platform BPM platform vendors focus on speeding development time for business process-based apps. Many of these vendors are introducing innovations for extending business processes to mobile devices, incorporating social interactions, and embedding DevOps and life-cycle management tools. The biggest shift in this category focuses on simplifying development complexity and speeding up the time it takes to train developers to be proficient on the platforms. Representative vendors include:

› **AgilePoint.** AgilePoint focuses primarily on rapid, low-code development and deployment of applications, including BPM applications. Its roots are in tight integration with Microsoft products, augmenting SharePoint in particular. The vendor also provides out-of-the-box connectors for Microsoft Dynamics. Over the past few years, AgilePoint has placed a premium on a product direction to help organizations drive a digital business strategy. In addition to revamping the design environment, AgilePoint has made significant investments to provide a BPM platform-as-a-service (PaaS) environment that can be adopted for both internal and OEM purposes. However, AgilePoint has moved far from its Microsoft roots: It is no longer built on a Microsoft stack and has taken an agnostic approach to the broader software ecosystem. It has built deep integration into Salesforce, exposing a fully functional AgilePoint user experience. It has developed a low-code native mobile application development environment and has also begun to make big development bets on driving BPM processes through internet of things (IoT) integration.

› **Appian.** Appian focuses on the rapid delivery of both process-centric and data/case-centric applications. In 2010, it was the first BPM software vendor to introduce social and mobile functionality as foundational components for its BPM platform, and its commitment to innovation continues today with a big bet on AI. This allows customers to collaborate around work tasks in new ways and opens up new use cases and scenarios for deploying BPM. New capabilities focus
on case management, data virtualization, responsive design, and application performance tuning. Appian makes a web-based process modeling, development, and execution environment available both on-premises and in the cloud. Low-code tends to be aimed toward rapid, and possibly iterative, development and less toward business users, although Appian has introduced no-code capabilities, such as its Quick Apps functionality, designed to enable citizen development. These are helping Appian to expand beyond customers with complex application requirements and access to professional developers.

› **Appway.** Appway built its reputation around providing a solution for customer onboarding in financial services. However, over the past few years, it has also positioned its solution as a general-purpose platform for building process-based apps and automating different types of work and tasks. The platform provides support for automating three different modes of work: 1) self-service customer tasks; 2) joint collaboration between customers and employees; and 3) back-office work.

› **AXON IVY.** AXON IVY has a strong partner network, which extends its footprint throughout Central Europe, including Switzerland and Germany. It has thrived in complex, highly regulated, mission-critical environments. With roots going back over 20 years and more than 350 customers, AXON IVY is a prominent regional BPM player. It is in the midst of a large global expansion, with North America as the first target.

› **Bizagi.** Bizagi focuses on hiding complexity in order to lower the time, cost, and skillset requirements to build robust process applications. To that end, it offers a free-download process modeling and application development studio environment that allows users to experience the full product offering in a low-risk, no-cost setting. Key Bizagi product features include a virtual data layer that allows business analysts and developers to model data structures that represent virtual views from different systems of record and back-end databases, as well as an extensible set of community-created connectors and UI widgets that users can install or adapt based on their specific integration or UI requirements. In a continuation of this strategy, in 2017 Bizagi intends to introduce machine learning capabilities that can be configured by non-data-scientists to help determine next-best actions based on analysis of historical data.

› **ITIESOFT | W4.** With a big focus on financial services, in particular banking and insurance, ITESOFT | W4 tends to skew toward large organizations and highly regulated environments. One key area of investment is fraud detection in submitted documents. To that end, it offers a cloud-based approach to document capture that can leverage cloud scale computing and large data sets across customers to train and run fraud detection algorithms. The Paris-based company’s products are particularly relevant to highly regulated European organizations.

› **K2.** A big player in the Microsoft workflow and BPM, K2 has long excelled at processes that include, but are not exclusive to, Microsoft applications — SharePoint and Office365 in particular. K2’s BPM solution targets application development teams that need a platform for rapidly building and deploying process-based apps. When Microsoft killed InfoPath as part of the SharePoint
stack, K2 quickly filled the form-builder gap. The solution includes support for building smart objects that allow developers to aggregate data from across multiple systems, including Microsoft Dynamics CRM, Salesforce, SAP, and other database and web service applications. Technical and nontechnical roles can also build “smart forms” on top of these data objects to create rich user experiences that present and capture data from multiple systems of record.

- **MatsSoft.** MatsSoft’s MATS Platform offers fast deployment and low-code application development. MatsSoft targets digital innovation and process teams that need a platform for rapid prototyping for quick time to value and agility, as well as scalable web-based and mobile apps that connect with internal operational processes and systems. The MATS platform permits nontechnical developers to configure business applications without programming or scripting. The platform provides a web-based forms designer to create rich user interaction, with responsive web and mobile app deployment. The platform is available both in the cloud and on-premises. MatsSoft found initial traction in the financial sector, handling mortgage applications, customer onboarding and account opening. This accounts for the comprehensive case management and BPM capabilities which are found today in its low-code offering. Additionally, MatsSoft recently launched a free, cloud-based, business-orientated process documentation tool called MATS Compose. This is primarily used for capturing business requirements ahead of low-code development projects.

- **MicroPact.** MicroPact takes a data-first approach with its BPM platform, which supports dynamic case management and unstructured process scenarios. MicroPact’s design environment supports rapid application development through configuration of data models, event states, business rules, and case objects. MicroPact has a strong presence in US federal and state government environments and provides a portfolio of process accelerators and prebuilt apps that target public-sector use cases. MicroPact’s platform is available in on-premises and cloud-based configurations.

- **Pegasystems.** With extensive BPM and case management capabilities, as well as robust mobile support, Pegasystems has been a key player in BPM since the inception of the category. However, even Pega is in the midst of a pivot, taking its platform and experience and focusing increasingly on solutions rather than platforms. Offerings such as CRM, applications for customer service, sales force automation (SFA), and marketing leverage the company’s BPM platform to drive value aligned with customer-facing initiatives. Pegasystems has also moved toward low-code and rapid deployment with a cloud-based, simplified version of the platform, called Pega Express.

**Specialist Platforms Provide Depth For Specific Customer Ecosystems**

Although the BPM software market is mature, new and smaller entrants are gaining traction within specific industries, geographies, and targeted use cases. We see specialist platforms organized around three different customer ecosystems: 1) Microsoft-focused platforms; 2) open source platforms; and 3)
domain-focused platforms. These vendors are innovating within their respective market segments and are taking market share from adjacent larger stack players and pure-plays.

Dozens of specialist technology providers offer BPM and workflow solutions targeting different domains and use cases. Besides those listed here, other specialist BPM technology providers include BizFlow and Ultimus (with an emphasis on professional services and implementation) and Isis Papyrus and OnBase by Hyland (with a focus on adaptive and dynamic case management).

**Microsoft-Focused Platforms**

Microsoft-focused platforms provide broad support for different products across Microsoft applications and cloud ecosystems. These vendors provide tight integration with SharePoint and provide development components optimized for .NET developers. Although these vendors grew out of the Microsoft ecosystem, they also provide good support for developing process applications that cross both the .NET and Java development environments. Representative vendors in this segment include:

- **BP Logix.** BP Logix offers a timeline-oriented process-design and automation environment along with adaptive case management. The process-design environment allows developers to build processes using a project-management-style interface that resembles a Gantt chart. This approach supports goal-based modeling and can provide predictive analytics and alerts to drive optimized process behavior, including the predicted impact on pending deadlines and dependencies. BP Logix provides a range of application connectors, allowing teams to quickly build forms and data models using familiar tools. This is particularly useful when coupled with ubiquitous productivity tools such as Microsoft Excel and Microsoft Word.

- **Nintex.** Historically focused on the Microsoft ecosystem, Nintex rapidly became the product darling for bringing workflow to SharePoint, although it provides good integration points across much of the Microsoft product line, including Office and Dynamics. In 2015, Nintex acquired Drawloop, a document generation software provider, to drive new composite application opportunities in the Salesforce and Microsoft clouds. In 2016, Nintex introduced Nintex Workflow Cloud. As its name implies, it is a cloud-based, low-code workflow and content-automation solution. It's important to note that, unlike other Nintex solutions, it does not take a dependency on any Microsoft applications.

- **PNMsoft.** Recently acquired by Genpact, a $2.5 billion company with a presence in 25 countries, PNMsoft now focus on transitioning its business from traditional BPM to digital transformation. To that end, it has placed bets on continuing investment in low-code development and has also started to explore AI, robotic process automation (RPA), and cognitive technologies. As part of aligning with Genpact, PNMsoft will begin to place more focus on finance and accounting while continuing to offer a platform for a broad array of vertical and horizontal use cases. It has a deep relationship with Microsoft, with Azure becoming a big bet for its cloud strategy. But it also continues to maintain integration with other key vendors such as SAP, Salesforce, IBM, and others to ensure agnostic integration.
Open Source Platforms

Open source vendors have gained traction in the BPM software market over the last two years. These vendors now compete more aggressively against larger traditional BPM vendors and balance strong product features against open development environments that customers can easily extend and customize. Representative vendors in this segment include:

- **Alfresco Software.** With roots in open source document management, Alfresco has long offered embedded BPM as part of its overall offering. In 2014, it broke out the BPM engine Alfresco Activiti and made it available as a standalone on-premises solution. The product provides support for both a simplified process design environment and a robust business process model notation (BPMN) modeling and development environment. It also provides support for collaborative task management and process reporting.

- **Bonitasoft.** Bonitasoft provided one of the first open source BPM platforms to support business-oriented design and development environments. The company’s go-to-market strategy targets DevOps and IT in large enterprises, and it has placed a focus on growing its base in North America. The Bonitasoft platform supports case management and process analysis capabilities that support business analysts and process analysts. Along with many traditional BPM vendors, Bonitasoft is now primarily focusing its messaging and R&D investments on low-code application development. The product is primarily available in an on-premises configuration, but it also supports Amazon Web Services (AWS) and CloudFoundry deployments.

- **Camunda.** Originally a consulting firm, Camunda now provides a full-featured open source BPM platform. Camunda’s platform targets application development teams that need greater control and access to the underlying process engine for testing and debugging process apps down to the lowest level. Its market penetration to date has been primarily in Europe, Germany in particular. It maintains dual headquarters in Berlin and San Francisco with a goal of pushing into North America and replicating its success in Europe. The platform supports case modeling, process modeling, and decision modeling standards and was traditionally available only on-premises; the company introduced a cloud option in 2016.

- **Red Hat.** Red Hat positions itself as a scalable solution for developers to build and execute process-driven applications. Its BPM solution integrates tightly with broader Red Hat middleware offerings and is particularly appealing to organizations invested in that broader strategy. The platform includes a web-based process modeling environment, a business rules engine, a process execution engine, and a work management environment. All of these components are based on open source projects. Red Hat distributes the product under the terms of Lesser General Public License (LGPL) open source licensing and offers a subscription model for support and maintenance. Red Hat emphasizes traditional, mission-critical BPM workloads over emerging, low-code alternatives.
Domain-Focused Platforms

Domain-focused vendors provide platforms optimized for specific process challenges. Although these vendors offer full-featured BPM software platforms, they have built or added components and frameworks that appeal to specific vertical and horizontal use cases, such as banking operations, manufacturing, and enterprise resource management. Representative vendors in the domain-focused segment of the BPM market include:

› **DST Systems.** With a focus on security and compliance, DST has demonstrated success in targeting financial services and healthcare, focusing on automating complex back-office process in highly regulated environments. Over the past three years, DST has worked to provide a seamless look and feel across process modeling, process development, and work management environments. The platform provides support for structured process and workflow orchestration, dynamic case management, and systems integration. DST provides the product in on-premises and managed cloud configurations. Its road map includes increased focus on analytics, with an increasing focus on process optimization.

› **Newgen Software.** Newgen Software’s BPM platform grew out of the vendor’s roots in content management and back-office automation. Over the past several years, Newgen has invested heavily in building a cohesive BPM platform that provides web-based modeling, analytics, and process automation. The vendor also offers a portfolio of solution accelerators and frameworks targeting banking and finance operations, shared services, and government. Newgen places a focus on the role of unstructured content in the context of process and has started applying content analytics, natural language processing, and sentiment analysis to help process and route written communications, such as incoming emails related to a process or case.

› **SAP.** SAP’s BPM platform targets the ecosystem of customers that use SAP’s broad range of business applications. These customers primarily use the BPM platform to create and customize workflows beyond the predefined business processes and best practices provided out of the box for different SAP packaged applications. SAP’s BPM platform includes a process modeling and design environment, operational intelligence dashboards, and integration components that provide connectivity to underlying SAP and third-party systems of record.

Recommendations

**Use Digital Initiatives To Redefine Your BPM Agenda**

AD&D pros need to cast aside outdated perceptions of BPM and create fresh agendas that prioritize using BPM platforms to power digital operations and digital customer experience. To evangelize this new vision and gain executive buy-in, take an outside-in view of how processes touch the digital lives of your end customers. While evaluating vendors that can help deliver on this new vision, prioritize vendors that:
› **Provide a wide array of development options.** Low-code is the new mantra of BPM vendors — for good reason. The new opportunities to rapidly iterate with deeper, more meaningful input from business stakeholders, as well as the ability to address a long-tail of application needs, are compelling. Low-code may be all some organizations need. Others have high-end needs, like complex integration with legacy systems and deep customization not available in low-code tools, that will never go away. If your organization has such high-end requirements, be prepared to standardize on a tool that can handle both ends of the spectrum or invest in multiple products to handle all of your organizational requirements.

› **Place a premium on design and user experience (UX).** If, in fact, customers are now the primary focus of BPM initiatives, be prepared: Anything less than an ideal UX will cause customers to leave for your competition. If your BPM initiatives will face customers, ensure that your vendor offers appropriate options for all form factors needed. As you evaluate vendors, you may want to assess their mobile development capabilities — and whether they offer a headless option that allows you to use your choice of front-end tools. Also, it is not too early to begin probing on vendor’s plans to support emerging interfaces such as voice and chat.

› **Align with your strategic portfolio and initiatives.** BPM is in a state of great change, but many things don’t change. Look for a solution that works well with current and planned investments. For example, a number of vendors leverage and extend Microsoft products, SharePoint in particular. If you’re heavily invested in a technology, align your BPM investment accordingly. Likewise, if a vendor offers preconfigured solutions or frameworks that support key initiatives, put it on your shortlist for consideration.

› **Prioritize cloud delivery to accelerate initial process wins.** The key to success in the age of the customer is delivering new solutions and apps at digital speed. This means delivering new solutions in weeks, not months. Avoid vendors that offer only on-premises deployments to get started with their platforms. On-premises set-up and configuration can sometimes take months to allocate hardware and install and configure systems. Consider only those vendors that offer instant cloud setup and configuration and can help you build out initial solutions in the cloud within days and weeks.
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Supplemental Material

**Survey Methodology**

Forrester’s Q2 2016 Digital Business Automation Survey was fielded to 215 business technology decision-makers. For quality assurance, we screened respondents to ensure they met minimum standards in terms of content knowledge.

Forrester fielded the survey during Q2 2016. Respondent incentives included a summary of the survey results and a courtesy copy of the published research. Exact sample sizes are provided in this report on a question-by-question basis. This survey used a self-selected group of respondents (Forrester clients knowledgeable about business process improvement efforts taking place within their companies) and is therefore not random. This data is not guaranteed to be representative of the population, and, unless otherwise noted, statistical data is intended to be used for descriptive and not inferential purposes. While nonrandom, the survey is still a valuable tool for understanding where users are today and where the industry is headed.
Endnotes

1 We explore the role of low-code development for BPM applications, as well as the role of low-code BPM to address rapid development of more standard business productivity applications. For more on this topic, please see the Forrester report “Brief: A Low-Code Manifesto For Speeding Up BPM Initiatives.”

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