

The Forrester Wave™: Digital Process Automation Software, Q3 2017

Traditional Process Vendors Take Aim At Digital Transformation

by Rob Koplowitz

July 5, 2017

Why Read This Report

In Forrester's 30-criteria evaluation of digital process automation (DPA) vendors, we identified 12 significant software providers — Appian, Bizagi, DST Systems, IBM, K2, Newgen Software, OpenText, Nintex, Oracle, Pegasystems, Software AG, and TIBCO Software — and researched, analyzed, and scored them. This report details our findings about how well each vendor fulfills our criteria and where they stand in relation to each other to help application development and delivery (AD&D) professionals select a partner to manage business' critical processes.

Key Takeaways

Appian, IBM, Oracle, Pegasystems, Software AG And Newgen Software Lead The Pack

Forrester's research uncovered a market in which traditional business process management (BPM) leaders like Appian, IBM, and Pegasystems continue to move their offerings toward low-code, Software AG takes advantage of a major new release, and Oracle reorients toward an aggressive cloud-first strategy.

DPA Represents A Big Shift From BPM

The DPA space is a significant expansion from traditional BPM, set apart by an emphasis on low-code development, consumer-grade user experiences, and AI-based innovation.

The Ability To Go Deep And Wide Are Key Differentiators

Forrester defines deep process applications as the complex, mission-critical efforts that were the domain of traditional BPM. While those remain relevant, DPA extends that definition to a wide array of more basic, situational process apps that are best led by business users with minimal IT support.

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Related Research Documents

- [Crafting A Strategic Plan For Digital Automation](#)
- [The Forrester Wave™: BPM Service Providers, Q4 2016](#)
- [Traditional BPM Gives Way To Digital Process Automation](#)

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Digital Transformation Requires Digital Process Automation

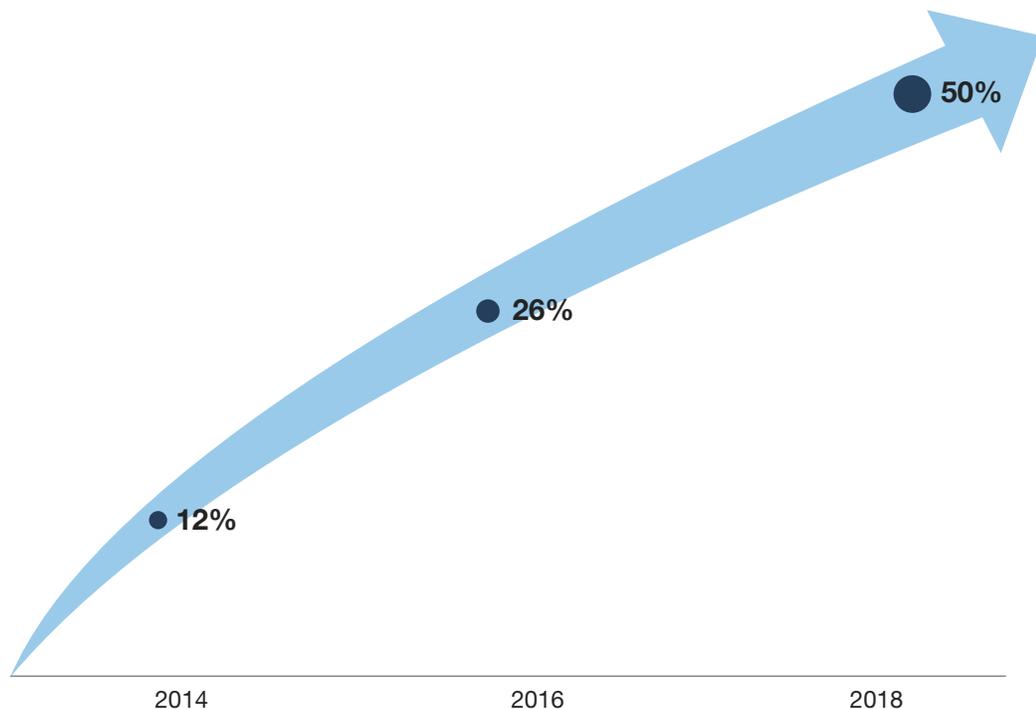
As organizations undertake digital transformation efforts, an important realization emerges: process matters. Investments in beautifully designed web and mobile experiences won't move the needle unless AD&D professionals ensure that the processes on the back end align to support a true end-to-end customer experience (CX). In a 2016 survey, enterprise respondents were clear: Their future focus for process improvement efforts will be to support digital transformation (see Figure 1). This represents a stark contrast from 2014, when decision makers cited cost reduction as their primary driver.¹ The shift represents a recognition that while cost reduction was a valuable goal, it was a waystation for more far-reaching process automation. In many organizations, hundreds, if not thousands, of manual processes stand in the way of digital transformation. In the words of one process leader:

“We were ripe for automation. Too many processes were manual and customers had to wait for people who were going through emails. To get to full automation, we had to put more power into the hands of users [who] really knew the processes.” (Business manager, global financial services firm)

FIGURE 1 Digital Transformation Is A Primary Driver For Process Investments

“What was the primary focus of your process improvement efforts two years ago? What is it today? What will it be in two years’ time?”

Digital transformation



Note: Only responses to “digital transformation” shown.

Source: Forrester’s Q2 2016 Digital Business Automation Survey

DPA Solutions Must Address Two Very Different Development Domains, Deep, And Wide

The shift from traditional BPM to DPA requires solutions that address different approaches, as well as fundamental tension in the market today. To get to full digital transformation, process-driven applications address the deep, complex needs they have traditionally targeted, while at the same time providing a platform for large numbers of rapid, business-driven applications. Forrester refers to these two approaches as the ability to go “deep” and “wide” (see Figure 2). The distinctions between the two approaches isn’t trivial:

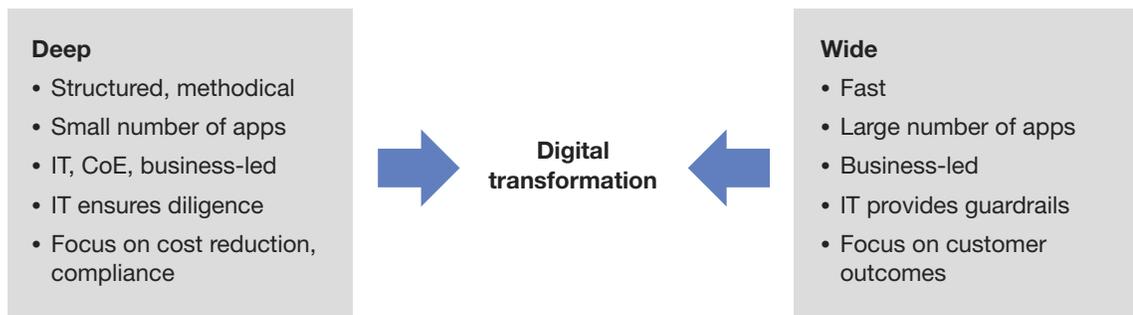
- › **Deep processes look like traditional BPM projects.** BPM grew up handling complex, long-running processes. Projects tended to require extensive upfront modelling, followed by long development cycles. The complexity of the processes often meant organizations would create

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a BPM center of excellence led by Lean Six Sigmas. There tended to be little experimentation because the processes were mission-critical. These complex processes are in no way disappearing and will continue to live at the center of the emerging trend toward digital process automation.

- › **Wide processes look more like low-code initiatives.** As digital transformation comes to the forefront, a new approach has emerged that addresses a very different class of application development. This is suited for developing of the long tail of applications that codify the dozens, if not hundreds, of manual processes that can trip up CX when organizations drive toward digital transformation. Business users must lead this effort with minimal IT support.

FIGURE 2 The Goal Of Digital Transformation Lives At The Center Of Very Different Development Approaches**The Functional Requirements For Wide And Deep Create Tension**

The new business requirements for DPA create new functional requirements for vendors. Traditional BPM already represented a complicated set of technology capabilities, some of which were unique to the process applications. To assess the functionality required to go deep, Forrester emphasized business rules/modeling, dynamic case management, and extended document support.

The functional requirements for going wide are quite different and add a new dimension to our evaluation. To assess these, Forrester emphasized low-code support, guide rails and governance, internet of things (IoT) features, customer journey mapping, and artificial intelligence (AI).

Addressing both sets of requirements creates a wide investment waterfront — and strategy challenges — for DPA vendors.

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Digital Process Automation Evaluation Overview

To assess the state of the DPA market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top DPA vendors. After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 30 criteria, which we grouped into three high-level buckets:

- › **Current offering.** We assessed the technologies based on the breadth of each tool set, with emphasis on functionalities required to go deep, such as robotic process automation, case management, and business modeling, as well as those required to go wide, such as rapid development, low-code capabilities, and future-looking investments in areas such as AI and IoT support. We surveyed customers to get firsthand observation on the strength of particular capabilities.
- › **Strategy.** DPA vendors must show coherent strategies that reframe and extend existing functionality to support digital transformation. We emphasized vendors that invest in innovative approaches to accelerating process transformation. We assessed the vendors' ability to adapt to the new business models, including changes to existing sales and distribution approaches, required to support the shift. We also looked at the depth of each vendor's partner ecosystem.
- › **Market presence.** We evaluated each vendor based on its total revenue, DPA-specific revenue, installed customer base, and geographic presence.

Evaluated Vendors And Inclusion Criteria

Forrester included 12 vendors in the assessment: Appian, Bizagi, DST Systems, IBM, K2, Newgen Software, Nintex, OpenText, Oracle, Pegasystems, Software AG and TIBCO Software. Each of these has demonstrated (see Figure 3):

- › **Breadth of support for DPA requirements.** Each evaluated vendor includes specific functionality to provide strong support for creating digital front-end process experiences for web and mobile. Their products also support process analysis, modeling, automation, and integration to improve operations. Vendors must also demonstrate strong capabilities in low-code or no-code development within the evaluated offering. Last, vendors must demonstrate commitment to innovation, with a particular focus on the role of AI in their offerings.
- › **Strong go-to-market strategy and thought leadership.** Selected vendors demonstrate the ability to shape the direction of the market, either through innovative capabilities or through their dominant market presence. Selected vendors also demonstrate an ability to execute go-to-market strategies that keep them relevant and visible in the market.
- › **Proven customer adoption across geographies and verticals.** Included vendors have a solid existing customer base among customers that have revenues of more than \$1 billion. The platform primarily targets and supports multiyear digital transformation and process-change initiatives. Vendors have a strong market presence across the North American, European, and Asia Pacific markets, with at least 10 large-scale implementations in production in each.

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- › **Relevance to Forrester clients.** Forrester clients ask about various platforms within the context of inquiry, advisory, and consulting. Products that are more highly represented in these client interactions are given priority in the inclusion process.

FIGURE 3 Evaluated Vendors: Product Information

Vendor	Product	Product version
Appian	The Appian Platform	The Appian Platform v. 17.2
Bizagi	Bizagi Digital Business Platform	11.1
DST	AWD	10.8.5
IBM	IBM Process Transformation Manager	8.9
K2	K2 blackpearl 4.7 & K2 Appit for SharePoint	K2 blackpearl 4.7
Newgen Software Technologies	Newgen OmniFlow iBPS Suite	3
Nintex	Nintex Workflow Platform. Products that Compromise DPA Suite: Nintex Workflow Cloud, Nintex Hawkeye, Nintex App Studio, Nintex Document Generation, Nintex Drawloop — Document Generation for Salesforce, Nintex Forms for Office 365, Nintex Forms for SharePoint, Nintex Workflow for Office 365, Nintex Workflow for SharePoint, Nintex Xchange	
OpenText	OpenText Process Suite	Release 16.1
Oracle	Oracle Process Cloud Service (PCS)	17.1.3
Pegasystems	Pega	7.2.2
Software AG	Software AG Dynamic Apps	10
TIBCO	TIBCO ActiveMatrix BPM (primary), TIBCO Jaspersoft (bundled), TIBCO Nimbus (add-on), TIBCO Spotfire (add-on)	TIBCO ActiveMatrix BPM 4.1.0, TIBCO Nimbus 10.0, TIBCO Spotfire 7.8

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FIGURE 3 Evaluated Vendors: Product Information (Cont.)**Vendor inclusion criteria**

Breadth of support for DPA requirements. Each evaluated vendor includes specific functionality to provide strong support for creating digital front-end process experiences for web and mobile. The product must also provide strong support for process analysis, modeling, automation, and integration to improve operations. Vendors must also strong capabilities in low-code or no-code development within the evaluation offering. Lastly, vendors must demonstrate commitment to innovation with a particular focus on the role of artificial intelligence in their offerings.

Strong go-to-market strategy and thought leadership. Selected vendors demonstrate the ability to shape the direction of the market, either through innovative capabilities or through their dominant market presence. Selected vendors also demonstrate an ability to execute go-to-market strategies that keep them relevant and visible in the market.

Proven customer adoption across geographies and verticals. Included vendors have a solid existing customer base among customers that have revenues of more than \$1 billion. The platform primarily targets and supports multiyear digital transformation and process-change initiatives. Vendors have a strong market presence across the North American, European, and Asia Pacific markets, with at least 10 large-scale implementations in production in each.

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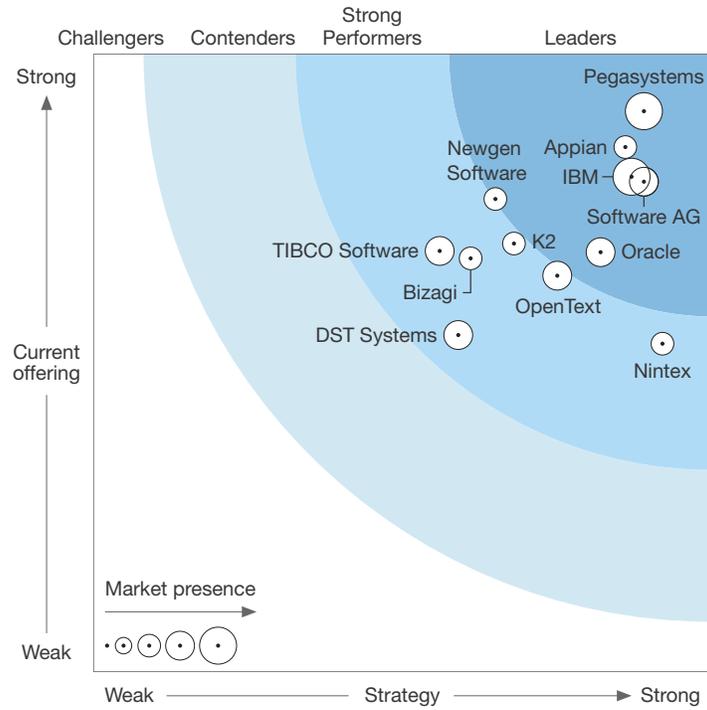
Vendor Profiles

This evaluation of the digital process automation market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave™ Excel-based vendor comparison tool (see Figure 4).

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FIGURE 4 Forrester Wave™: Digital Process Automation Software, Q3 2017



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Go to Forrester.com to download the Forrester Wave tool for more detailed product evaluations, feature comparisons, and customizable rankings.

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FIGURE 4 Forrester Wave™: Digital Process Automation Software, Q3 2017 (Cont.)

	Forrester's weighting	Appian	Bizagi	DST	IBM	K2	Newgen Software	Nintex	OpenText	Oracle	Pegasystems	Software AG	TIBCO Software
Current Offering	50%	4.23	3.33	2.71	3.99	3.45	3.81	2.64	3.19	3.38	4.52	3.95	3.39
Collaborative modeling	1%	5.00	5.00	3.00	5.00	4.00	5.00	3.00	5.00	4.00	5.00	5.00	5.00
Smart forms and user experience	1%	5.00	5.00	3.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Business rules/modeling	9%	4.00	4.00	3.00	4.00	3.00	3.00	1.00	4.00	4.00	5.00	4.00	4.00
Robotic process automation	8%	3.00	3.00	1.00	3.00	1.00	4.00	1.00	1.00	3.00	4.00	3.00	1.00
Dynamic case management	6%	5.00	4.00	4.00	4.00	3.00	5.00	2.00	4.00	2.00	5.00	4.00	5.00
Document support	4%	5.00	4.00	4.00	3.00	4.00	5.00	3.00	4.00	3.00	5.00	5.00	3.00
Process and flow design	5%	5.00	5.00	5.00	5.00	5.00	5.00	3.00	5.00	5.00	5.00	5.00	5.00
Low-code/no-code	10%	5.00	5.00	3.00	3.00	5.00	3.00	5.00	3.00	5.00	3.00	3.00	3.00
Mobile engagement	2%	5.00	5.00	1.00	4.00	5.00	5.00	5.00	4.00	5.00	5.00	5.00	4.00
API support	0%	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Data virtualization	0%	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Customer journey metrics	6%	3.00	1.00	1.00	1.00	1.00	4.00	1.00	1.00	1.00	4.00	4.00	3.00
IoT support	10%	3.00	1.00	1.00	5.00	1.00	3.00	1.00	3.00	3.00	5.00	5.00	3.00
Deployment options	2%	5.00	3.00	3.00	5.00	3.00	5.00	3.00	3.00	5.00	3.00	3.00	3.00
Analytics	7%	5.00	3.00	5.00	5.00	5.00	3.00	3.00	3.00	3.00	5.00	3.00	3.00
Integrations	3%	5.00	5.00	3.00	4.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Guardrails and governance	10%	5.00	3.00	3.00	5.00	5.00	3.00	3.00	3.00	3.00	5.00	3.00	3.00
Life-cycle management	1%	5.00	5.00	5.00	5.00	5.00	5.00	3.00	5.00	3.00	5.00	5.00	5.00
Enterprise scalability	2%	5.00	3.00	5.00	5.00	5.00	5.00	5.00	5.00	3.00	5.00	5.00	5.00
Artificial intelligence	10%	3.00	3.00	1.00	4.00	3.00	4.00	3.00	3.00	3.00	4.00	4.00	3.00
Digital workplace	3%	5.00	3.00	4.00	4.00	5.00	4.00	3.00	3.00	3.00	5.00	5.00	5.00

All scores are based on a scale of 0 (weak) to 5 (strong).

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FIGURE 4 Forrester Wave™: Digital Process Automation Software, Q3 2017 (Cont.)

	Forrester's weighting	Appian	Bizagi	DST	IBM	K2	Newgen Software	Nintex	OpenText	Oracle	Pegasystems	Software AG	TIBCO Software
Strategy	50%	4.30	3.05	2.95	4.35	3.40	3.25	4.60	3.75	4.10	4.45	4.45	2.80
Product strategy	40%	5.00	3.00	3.00	4.00	4.00	3.00	4.00	3.00	3.00	4.00	4.00	3.00
Pricing	10%	5.00	5.00	3.00	5.00	3.00	3.00	5.00	3.00	5.00	5.00	5.00	1.00
Ease of implementation	15%	5.00	4.00	4.00	4.00	5.00	4.00	5.00	4.00	5.00	4.00	4.00	3.00
Templates and applications	5%	3.00	3.00	5.00	3.00	3.00	5.00	5.00	3.00	3.00	5.00	5.00	3.00
Resource availability	30%	3.00	2.00	2.00	5.00	2.00	3.00	5.00	5.00	5.00	5.00	5.00	3.00
Market Presence	0%	2.50	2.15	3.05	4.65	2.90	2.40	2.65	3.55	3.45	4.10	4.00	3.20
Revenue	50%	2.00	1.30	2.60	4.30	1.30	1.30	1.30	2.60	2.90	3.70	3.00	1.90
Customers and markets	50%	3.00	3.00	3.50	5.00	4.50	3.50	4.00	4.50	4.00	4.50	5.00	4.50

All scores are based on a scale of 0 (weak) to 5 (strong).

Leaders

- › **Pegasystems.** Aimed squarely at solving the most complex process challenges, Pegasystems offers a wide and deep set of capabilities, including dynamic case management, robotic process automation (RPA), mobile applications, document management, a no-code development environment, and business decision management that includes machine learning to determine next best action. Pegasystems also offers business applications, including customer relationship management (CRM), sales force and marketing automation, and call center software, all based on the same consistent process platform that drives its DPA offering. When fully adopted by an enterprise, this approach creates a highly unified and agile architecture. Also, it's important to note that Pegasystems has a long history of investment in the AI space: This is already evident in its platform, but it will pay off even more as AI becomes a core requirement for DPA. While customers praised Pegasystems' ability to adapt to changing market requirements, they also indicated some concern about whether the licensing model could meet the needs of very wide deployments.
- › **Appian.** Appian has a strategic focus on providing a low-code platform to rapidly build consistent, secure, mission-critical business applications. As a Leader in both Forrester's DPA and low-code Forrester Waves, it is well positioned to help customers on complex process applications

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while also supporting the efficient automation of a broad range of processes required to drive true digital transformation. Appian covers most traditional BPM requirements with a combination of native capabilities, including its recently introduced business decision management offering. Preintegrated partner offerings further extend Appian's features. All of this, combined with an early commitment to low-code for rapid application development, means Appian is well positioned for taking customers deep and wide in DPA. Appian has positive customer references, particularly in regard to speed and agility of development.

- › **Software AG.** A longtime player in the traditional BPM space, with its webMethods BPMS, Software AG offers strong support for dynamic case management, integrated RPA, extensive document support, and process modeling. With the addition and integration of webMethods AgileApps for low-code, rapid development, Software AG now has a portfolio that can help an organization go wide in DPA deployments. With last year's acquisition of Zementis, Software AG can now extend its already significant analytics capabilities with a true AI framework. It has also invested heavily and found market traction with its support for IoT-driven processes. Customers have expressed a great deal of interest in the latest release, which we evaluated for this Forrester Wave, but they have also expressed some hesitation about upgrading until it is fully proven in the market.
- › **IBM.** IBM continues to offer a wide array of capabilities to address deep, complex, highly scalable process applications. Its capabilities include support for advanced decision management, integrated RPA, dynamic case management, and more. It also offers strong support for low-code development and simple object reusability, and is thus well positioned for organizations looking to take DPA wide. However, what's most interesting about IBM is its willingness and ability to be disruptive. The recent introduction of the digital business assistant takes a very different approach to the automation of routine tasks and decision making for employees by allowing individuals or small groups to access to an easy-to-use tool for automating repetitive tasks and providing insights. In addition, IBM is still in the early stages of integrating its Watson cognitive services into its process offerings. With AI looming as the next big opportunity in DPA, deep Watson integration holds tremendous potential. Customers who evaluated IBM alongside competitors were pleased with the power of the platform but mentioned that other vendors had greater UI functionality that could lead to a better user experience. IBM has recognized this issue and has overhauled its UI toolkit and the expectation on Forrester's part is that these issues have been mitigated.
- › **Oracle.** Large vendors that have been in a market for a long time have generally had a difficult time reinventing themselves and becoming disruptors, but that is exactly Oracle's strategy. Oracle's Process Cloud Server (PCS) is part of its overall shift to become a major provider of cloud applications. While its traditional BPM offerings remain available, its strategic focus is on the new cloud-first offering, which embraces capabilities such as simple instant provisioning with no IT support and no traditional sales process. As Oracle builds out existing cloud-first services like API management and mobile development, they will be designed for simple integration with PCS. Oracle is still relatively early in this approach, but it has built a solid offering — and more importantly, it has set a foundation for rapid delivery and integration of new capabilities. As Oracle

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makes this transition from primarily an on-premises process vendor to a primarily cloud one, organizations that have deep and complex needs may wait for the cloud offering to catch up, but, strategically, this shift represents a forward-thinking move for Oracle. Reference customers were positive about the PCS experience to date, while acknowledging that they were early in the journey and had not yet tackled the more complex applications, but had plans to do so.

- › **Newgen Software.** Once a content/document-centric vendor, Newgen has evolved toward a full-featured provider of process automation solutions. With that foundation in place, Newgen has invested in a low-code environment to meet the next generation of process needs. It emphasizes CX: To that end, it offers very strong mobile support and is actively investing in new user interaction models such as voice and chat. Newgen's offering is strong across the board for both deep, complex processes and, increasingly, for wide deployment of applications. While customers were positive on the Newgen relationship, one did report some initial concern about the responsiveness of the team Newgen assigned to support custom process development.

Strong Performers

- › **Nintex.** Once associated with Microsoft, specifically SharePoint and Office 365, Nintex has turned its products in a platform-agnostic direction. Its next big bet became clear when it acquired the automated document creation vendor Drawloop, bringing deep expertise and integration with the Salesforce platform into the fold. Nintex focuses on driving wide adoption of process automation: It excels in low-code and citizen development, with its largest installations running thousands of applications, which Nintex refers to as workflows. Organizations looking for high-end capabilities such as dynamic case management, robotic process automation, and complex business decision management will not find a fit with Nintex, but those looking to automate a long tail of business applications will find a straightforward and highly manageable platform. Nintex customers were very positive about the simple development environment that allowed large numbers of applications to be developed and deployed quickly, but they did note that Nintex was best suited to wide deployment and relied on other process tools for more complex applications.
- › **OpenText.** After a series of acquisitions in the BPM space, OpenText has worked hard to rationalize the assets and define a single cohesive strategy. With that effort behind it, OpenText now has a solid platform in place, as well as a predictable road map. The investment in a data-first, low-code strategy is in place, and later in 2017, OpenText plans to introduce an even simpler, wizard-based development model for organizations looking to empower true citizen developers. OpenText will also drive deeper integration with its analytics offerings. As one would expect, OpenText places a premium on content integration as a cornerstone of its DPA strategy, and it excels in both document and case management. Customers were pleased with the low-code capabilities and object reusability, but they had some concerns about help desk support.
- › **K2.** While most traditional BPM vendors added low-code development to enable rapid application development and iteration, K2 was an early adopter and disrupter in the low-code BPM space. It has been steadily addressing increasingly deep and complex process applications. Coming

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from a low-code perspective, K2 places a focus on form development, mobile support, and object reusability — all focused on ensuring citizen developers will require minimum support from professional developers. That said, K2's product has demonstrated the ability to handle very complex, highly scaled applications.

- › **Bizagi.** Bizagi was an early proponent of the trends that have moved process to the center of digital transformation. With process modeling and low-code development tools available for free download, Bizagi's value proposition aims squarely at enabling collaboration between business and IT. That said, Bizagi also possesses the native capabilities and partnerships needed to support business process automation across the enterprise — including business decision management and robotic process automation. With this combination, it is well positioned to support both wide and deep process applications. Customer feedback was largely positive, particularly with respect to Bizagi's competitive pricing.
- › **TIBCO Software.** With roots in deep integration and highly scaled transactional systems, TIBCO serves enterprise and complex scenarios with its DPA offering. TIBCO offers integration to other parts of its portfolio, such as its Enterprise Service Bus and Spotfire analytics offerings. The platform offers low-code development support in addition to more traditional process-centric development. TIBCO recently introduced a new low-code offering that is cloud-native and citizen-developer-focused. With this offering, it chose to complement the high-end DPA platform with a separate citizen-developer-targeted user experience rather than extending the existing platform. While TIBCO offers a strong general use platform, it thrives in organizations that can take advantage of TIBCO's broader areas of investment and expertise, particularly in financial services, telecommunications, and utilities.
- › **DST Systems.** DST's AWD platform aligns with its broader strengths and focuses primarily on healthcare, financial services, and insurance. That creates a clarity of purpose in building product capabilities designed to serve customers in those areas, offering capabilities such as process automation and management, case management, and document management. The platform scales to meet the needs of highly transactional environments. DST has embraced a low-code development environment that supports rapid iteration, focusing on addressing deep process needs in its target verticals. While DST has offerings that focus on digital consumer engagement, they are not necessarily all delivered from the AWD platform. Areas like out-of-the-box rich mobile experiences require third-party tools in some cases.

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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.

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Online Resource

The online version of Figure 4 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of 3 data sources to assess the strengths and weaknesses of each solution. We evaluated the vendors participating in this Forrester Wave, in part, using materials that they provided to us by May 3, 2017.

- › **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.
- › **Product demos.** We asked vendors to conduct demonstrations of their products' functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- › **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with 3 of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave evaluation — and then score the vendors based on a clearly defined scale. We intend these default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, please visit [The Forrester Wave™ Methodology Guide](#) on our website.

The Forrester Wave™: Digital Process Automation Software, Q3 2017

Traditional Process Vendors Take Aim At Digital Transformation

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the [Integrity Policy](#) posted on our website.

Endnotes

¹ In Forrester's Q2 2016 Digital Business Automation Survey respondents indicated that in 2014 the primary driver for process automation was cost reduction at 30%. By 2016, the number had dropped to 13% and when we asked respondents to project forward to 2018, it drops even further to 7%. Source: Forrester's Q2 2016 Digital Business Automation Survey.

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