



Service Delivery Automation (SDA) – Technology Provider Profile Compendium

Market Report: December 2015 – Preview Deck

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¹ Banking, financial services, and insurance

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Background and scope of the research

Background of the research

Service Delivery Automation (SDA) has the potential to offer high value in terms of inorganic reduction in costs and quick implementation. Moreover, this value is realizable at much lower risk as the system is non-invasive and easily remediable. As a consequence, many market participants, whether enterprises or business process services providers, are looking to take a plunge in this arena. However, SDA is a burgeoning market with technologies that are still relatively unknown by many potential buyers in terms of solution features, deployment models, supporting frameworks, and commercial aspects.

In this context, this report provides profiles of key SDA technology vendors and their products. This report complements the report titled “Service Delivery Automation (SDA) – The Story Beyond Marketing Messages and an Assessment of SDA Tools” which was published in late 2015. It provides further assessment of the technologies as part of an Everest Group FIT Matrix.

Scope of the study and methodology of this report include:

- Only SDA tools that are sold independently from ongoing business process outsourcing services were considered for this report. These include tools that can be deployed and run by the clients in-house, or require professional services for deployment, and ongoing services as part of a hosted offering
- Tools from 10 SDA technology vendors were assessed: Automation Anywhere, Blue Prism, Exilant, Celaton, IPsoft, NICE (Robotic Automation), OpenSpan, Softomotive (WinAutomation), UiPath, and Xerox (XAI)

This report is based on three key sources of proprietary information

- 1**
 - **Proprietary database of 10 SDA technology vendors**
 - The database tracks the following capability elements for each vendor:
 - Automation creation features
 - Automation management features
 - Input/output options available
 - Support in terms of consulting, implementation, and training
 - Offered commercial model(s)
 - Buyer coverage in terms of industry, geography, and buyer size
 - Company performance in terms of revenue and clients

- 2**
 - **Demonstrations and interactions with technology vendors and other industry stakeholders**
 - Detailed demos and interviews with SDA technology vendors for a comprehensive view of the solutions
 - Interviews with technology vendors' reference clients
 - Executive-level discussions with technology vendors as well as BPS providers that cover:
 - Current state of the market
 - Opportunities and challenges
 - Expected direction of movement in the industry
 - Vendor / service provider vision and roadmap
 - Executive-level discussions with industry enablers / specialist technology integrators to get the buyer perspective and also to reaffirm the findings from other sources
 - On-site as well as conference meetings with SDA technology buyers to understand:
 - Business case
 - Apprehensions & challenges
 - Approach
 - Outcomes
 - Future direction

- 3**
 - **The proprietary database of SDA capabilities of eight major BPS providers complements the research**
 - The database tracks the following capability elements for each service provider:
 - Robotic Process Automation (RPA) historical and projected adoption trends
 - Support in terms of consulting, implementation, and training
 - Offered commercial model(s)
 - Buyer coverage in terms of industry, geography, and buyer size
 - Key processes covered in terms of RPA deployment

Service providers covered in the analysis



blueprism

Celaton

EX!LANT



NICE®

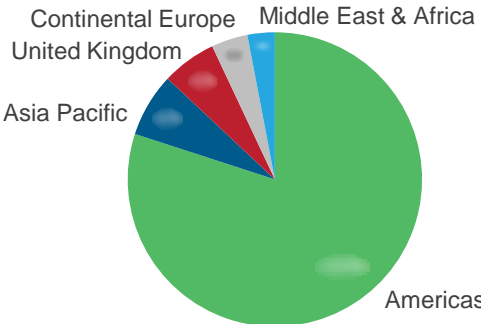
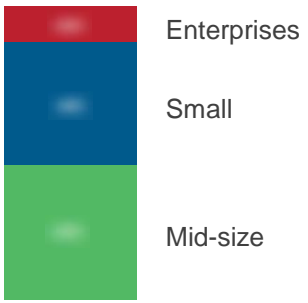
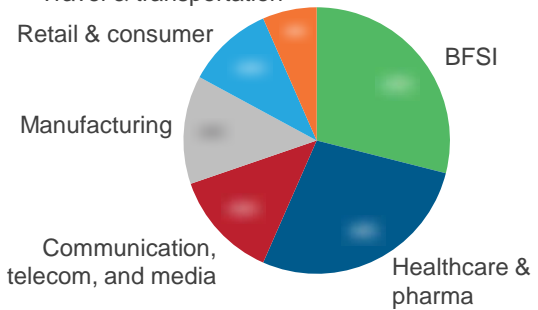
openspan

UiPath



xerox

Company overview	Product overview
XXX Key technology leaders: XXX Headquarters: XX XX Key clients include: XXX Website: www.abc.com	XXX

Buyer location and industry mix ¹		
Revenue mix by geography 2015 	Revenue mix by size of client² 2015 	Revenue mix by client industry 2015 

1. Everest Group estimates based on information shared as part of SDA vendor assessment RFI and briefings up to June 2015

2. Enterprises (revenue of more than US\$1billion), mid-size (revenue of more than US\$25 million and up to US\$1billion), and small (revenue of less than US\$25 million)

Source: Everest Group (2015)

Solution scope¹

Options for automation creation	Code the actions	Record the actions	Assemble objects from previous automations	Visual drag-&-drop development	Machine learning-based	
	✓			✓		
Key tool features	Pre-built connectors	Logical access model	Task scheduler	Collaboration tool	Handling of unstructured data	
	✓	✓		✓		
Deployment options	Client-hosted on desktop/laptop	Client-hosted on server	Provider-hosted, multi-instance	Provider-hosted, single instance	Partner-hosted, single instance	Partner-hosted, multi-instance
	✓	✓			✓	✓
Support	Training by vendor	Training by partners	Consulting by vendor	Consulting by partners	User community	Tool-embedded help
	✓			✓	✓	✓

¹ Everest Group estimates based on information shared as part of SDA vendor assessment RFI and briefings up to June 2015
Source: Everest Group (2015)

Comparison of ABC’s technology characteristics with industry practices¹

Deployment & maintenance

- XXX
- XXX
- XXX

Buyer coverage

- XXX
- XXX
- XXX




Pricing model

- XXX
- XXX

Non-exhaustive list of recent deals and announcements

Announcement	Company	Description
August 2015	XXX	XXX
November 2014	XXX	XXX
October 2013	XXX	XXX

¹ Everest Group estimates based on information shared as part of SDA vendor assessment RFI and briefings up to June 2015
Source: Everest Group (2015)

Everest Group's assessment ¹			● High ● Low
Evaluation dimension	Rating	Remarks	
Overall company		Strengths <ul style="list-style-type: none"> • XXX • XXX Opportunities <ul style="list-style-type: none"> • XXX • XXX 	
Solution and support		Strength <ul style="list-style-type: none"> • XXX • XXX Opportunities <ul style="list-style-type: none"> • XXX • XXX 	
Commercials		Strengths <ul style="list-style-type: none"> • XXX • XXX Opportunities <ul style="list-style-type: none"> • XXX 	
Other remarks			
<ul style="list-style-type: none"> • XXX • XXX 			

¹ Everest Group estimates based on information shared as part of SDA vendor assessment RFI and briefings up to June 2015
Source: Everest Group (2015)

Technology in BPS research calendar

Published Current

Topic	Release date
Service Delivery Automation (SDA) Market in 2014 – Moving Business Process Services Beyond Labor Arbitrage	October 2014
Analytics Business Process Services (BPS) – Service Provider Landscape with PEAK Matrix™ Assessment 2015	February 2015
Service Delivery Automation (SDA) - The Business Case for Robotic Process Automation in Finance and Accounting	March 2015
Service Delivery Automation (SDA) - The Business Case for Robotic Process Automation in Insurance Services	March 2015
Reinventing Business Process Services (BPS) – Leveraging Technology to Deliver on New Expectations	March 2015
Technology in BPS – Service Provider Profile Compendium 2015	June 2015
Social Media Analytics - Growth Engine for Next-Gen Customer Care	June 2015
Service Provider Technology Landscape – The Pecking Order	August 2015
Seizing the Robotic Process Automation (RPA) Market Opportunity	October 2015
Service Delivery Automation (SDA) – The Story Beyond Marketing Messages and an Assessment of SDA Tools	December 2015
Service Delivery Automation (SDA) technology provider compendium	December 2015

Additional technology research references

The following documents are recommended for additional insight on the topic covered in this report. The recommended documents either provide additional details on the topic or complementary content that may be of interest

- 1. Service Delivery Automation (SDA) – The Story Beyond Marketing Messages and an Assessment of SDA Tools** ([EGR-2015-10-R-1646](#)); 2015. This report provides a detailed view of the SDA technology market by providing a thorough assessment of the various SDA technology solutions and ranking them along Everest Group's Feature, Implementation, and impacT (FIT) Matrix. The report also analyzes key strengths and areas of improvement for each of the technology vendors from the perspective of their SDA solution. Additional insights on the market, operating models, capabilities of different tools, and commercial models have also been provided
- 2. Seizing the Robotic Process Automation (RPA) Market Opportunity** ([EGR-2015-10-R-1609](#)); 2015. The report examines the state of the RPA market today and its potential in the coming years. It offers a series of case studies across horizontal and vertical business processes and highlights lessons learned from early RPA adopters. This report also explores the “coopetition strategy” adopted by BPS service providers, RPA technology vendors, and specialist technology integrators and the various options it results in for a BPS buyer. Finally, it takes a look at the future implications of RPA on the BPS industry
- 3. Service Delivery Automation (SDA) - The Business Case for Robotic Process Automation in Finance and Accounting** ([EGR-2015-1-R-1402](#)); 2015. This report examines the market that is broadly referred to as “Service Delivery Automation” (SDA) and its subset, Robotics Process Automation (RPA). It covers overview of process automation technologies, market drivers for RPA adoption, and cost implications of RPA when applied to F&A

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