



Robotic Process Automation (RPA) – Technology Vendor Profile Compendium 2019

Service Optimization Technologies (SOT)

Market Report – July 2019: Complimentary Abstract / Table of Contents

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Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

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Background of the research

Background of the research

Robotic Process Automation (RPA) is a key enabler of enterprise automation. It is rapidly gaining traction across industries and geographies, as more enterprises are becoming aware of its benefits. These benefits include reduction in costs, increased operational efficiency & quality, improved workforce productivity, enhanced customer & employee experience, and quick time-to-value. Encouraged by a growing number of success stories and positive word of mouth, many enterprises, Global In-house Centers (GICs), and service providers are investing in RPA. Selecting the right enterprise-grade RPA technology partner(s) is critical to success. However, RPA is a burgeoning market with technologies that are relatively new to many potential buyers in terms of product features, deployment options, training & support, partner ecosystem, and commercial models. The technologies are also evolving, with an expanding feature set and an increasing richness of functionality.

The objective of this report is to provide key stakeholders a snapshot of the RPA offerings and capabilities of 22 leading RPA technology vendors. The report allows technology vendors to compare their offerings, capabilities, and areas of strength and improvement with other vendors in the marketplace. It also helps existing and potential buyers of RPA software to assess the technology vendors on the capabilities that they desire.

Each technology vendor profile covers the following details of vendors vis-à-vis their RPA offerings and capabilities:

- Company overview
- Recent deals and announcements
- Market adoption and client portfolio mix
- Product features & functionalities and key enhancements
- Delivery capabilities
- Partnerships
- Measure of capabilities across PEAK Matrix™ dimensions
- Key strengths and areas of improvement for technology vendors

Principles of Intelligent Automation (IA)

1

Automation – at its most basic level – must utilize technology to replace a series of human actions. Correspondingly, not all technologies provide automation, and replacing a single human action with technology (e.g., a mathematical equation in a spreadsheet) is not automation. At the same time, automation can be done by degrees, but some steps will still require human interaction.

2

Much automation is already embedded in software systems (e.g., linking client information across marketing and supply chain systems); however, because it is part of the normal feature-functionality of a system, it is generally not considered automation, but simply a more powerful system(s).

3

Automation for IT is very different than for business processes:

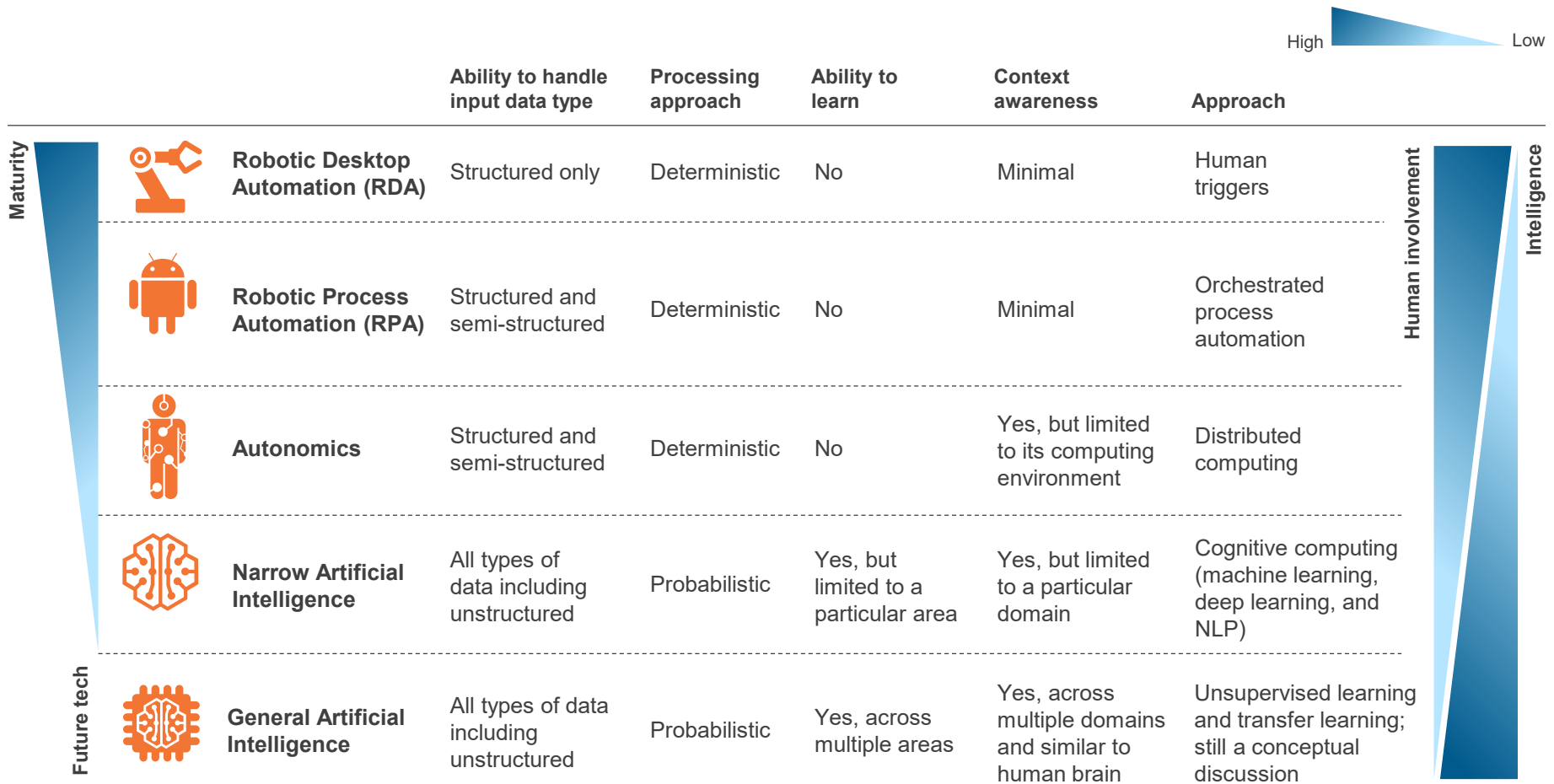
- In IT, automating is generally addressed by improving the core functionality and is handled by the IT system management tools. Further, these activities are owned by central IT, which is naturally incented to create more efficient IT operations
- In business processes, system limitations are generally much more difficult to overcome, and they stretch across many systems in the organization. As such, the business case for significant system change is generally unappealing. Finally, the benefits of improved processes accrue to the business and are hard to quantify with an ROI that can motivate central IT groups to invest their resources

4

Intelligent automation can be accomplished by combining multiple technologies. For example, traditional Business Process Management (BPM) technologies can be further enhanced by combining them with newer User Interface (UI) / robotic process tools. Cognitive computing, although in its infancy, represents the next horizon, as automation not only replicates human behavioral characteristics while executing judgment-intensive IT and business processes, but also creates the potential to spawn new businesses for IP-owners and enterprises.

Everest Group's Intelligent Automation (IA) spectrum

Intelligent automation includes a spectrum of solutions for automating processes



Note: In this report, we have referred to rules-based/deterministic intelligent automation solutions (i.e., RDA, RPA, and autonomics) collectively as RPA

Everest Group's SOT research is based on multiple sources of proprietary information

Proprietary database of 22 RPA technology vendors

The database tracks the following elements for each vendor:

- Automation design, development, and integration
- Automation control and monitoring
- IT governance and security
- Partnerships with service providers and other technology vendors
- Support in terms of product training, maintenance, consulting, and other support services
- Availability and adoption of commercial model(s)
- Portfolio coverage in terms of industry, geography, process areas, and buyer size
- Vendor performance in terms of revenue and clients

Demonstrations and interactions with technology vendors and other industry stakeholders

- Detailed demos and interviews with RPA technology vendors for a comprehensive view of the products
- Interviews with technology vendors' reference clients
- Executive-level discussions with technology vendors as well as service providers that cover:
 - Current state of the market
 - Opportunities and challenges
 - Expected direction of movement in the industry
 - Technology vendor / service provider vision and roadmap
- Executive-level discussions with industry enablers / specialist system integrators to get the buyer perspective, and also to reaffirm the findings from other sources
- On-site as well as conference meetings with enterprise RPA buyers to understand:
 - Vision and objectives
 - Buying criteria
 - Apprehensions and challenges
 - Outcomes achieved
 - Future direction

Proprietary database of RPA and AI capabilities of 40+ leading technology vendors and BPS providers complements the research

The database tracks the following capability elements for each service provider:

- Clients with automation deployments, scale and scope of deployments, cost savings, and case studies
- Automation client portfolio across buyer sizes, geographies, industries, and BPS segments
- Vision and strategy, top automation solutions, their value propositions, and RPA and AI features
- Technology partners and collaborations with academic institutes
- Investments specific to RPA and AI as well as engagement & commercial models

Vendors covered in the analysis

**ANOTHER
MONDAY**

ANTWORKS
Reimagine · Rethink · Recreate

**AUTOMATION
ANYWHERE**
Get the most.

AutomationEdge

blueprism

DATAMATICS
Data to Intelligence

edgeverve
An Infosys company

helpsystems

INTELLIBOT

Jacada
CORPORATE

Jidoka

KOFAX

KRYON

NICE

nintex

nividous

PEGA

servicetrace

softomotive
We talk automation

thoughtonomy

UiPath

WorkFusion

The study provides detailed view of vendors' RPA offerings & capabilities as well as key strengths & areas of improvement | Snapshots to illustrate the depth of report

Assessment of capability and market impact

Measure of capability: ● High ○ Low

	Market impact				Vision & capability						
	Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Development & integration	Deployment & maintenance	Product training & support	Commercial model	Overall	
Technology vendor 1	●	●	●	●	●	●	●	●	●	●	
Technology vendor 2	○	○	○	○	○	○	○	○	○	○	
Technology vendor 3	○	○	●	○	○	○	○	○	○	○	
Technology vendor 4	○	○	○	○	○	○	○	○	○	○	
Technology vendor 5	○	○	○	○	○	○	○	○	○	○	
Technology vendor 6	○	○	○	○	○	○	○	○	○	○	
Technology vendor 7	○	○	○	○	○	○	○	○	○	○	
Technology vendor 8	○	○	○	○	○	○	○	○	○	○	

Technology vendor's overview

Company overview

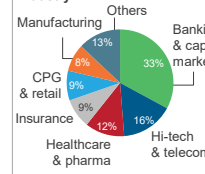
Vendor 1 is a U.S.-based RPA software vendor. Established in xxx, the company provides solutions to automate business processes by combining RPA and smart automation / cognitive technologies (leveraging machine learning natural language processing capabilities), enabling companies to build intelligent digital workforces. The vendor benefits from a large partner base including leading system integrators and global service providers.

Key technology leaders: xxx
Headquarters: xxx
Key clients include: xxx
Website: xxx

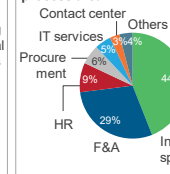
Non-exhaustive list of recent deals and announcements

- Month Year: xxx
- Month Year: xxx
- Month Year: xxx
- Month Year: xxx

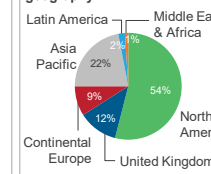
Split of RPA revenue by buyer industry



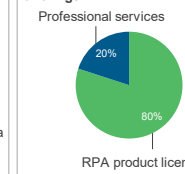
Split of RPA revenue by process area



Split of RPA revenue by buyer geography



Split of RPA revenue by offerings



Product features and functionalities

Legend: Available (Green), In the roadmap (Yellow), Available via partner (Blue), Not available (Grey)

Capability & offerings	Available	In the roadmap	Available via partner	Not available
Design and development of robots	Built-in process/macro recorder – DOM/COM-based	Built-in process/macro recorder – image-based	Edit/enhance the recorded steps	Object capture – DOM/COM recognition
	Object capture – image recognition	ICA protocol / native support for Citrix	Grey-scale image processing	Develop robots using voice commands
	Built-in process workflow tool to create or orchestrate robots			
Reusability and interoperability	Develop/configure in a layered manner	Out-of-the-box repository of pre-built reusable activities/functions	Ability to create and share a library of reusable components within the organization	
	Ability of users to control access to shared components in multi-team environments	Online portal to utilize pre-built objects and upload new ones	Online marketplace for vendor-approved pre-built reusable assets/automations	
	Pre-built connectors to automate SAP applications	Pre-built connectors to automate Oracle applications	Out-of-the-box integration with third-party cognitive services (e.g., Google and Microsoft)	
Complementary capabilities	Process mining – ability to discover processes and identify automation opportunities	Process mining – ability to automatically create automation workflows based on identified automation opportunities	Business Process Management (BPM)	
	Virtual agents / chatbots	Intelligent Document Processing (IDP)		
RDA / attended RPA or human-in-the-loop	Ability to execute robots on user desktops using user events / triggers	Human-in-the-loop automations	AI-based decision-making for next-best action	Unified screen for RDA / human-in-the-loop automations
	Interactive UI for on-screen step-wise guidance for users	Ability to record and analyze user's interactions with the desktop	Ability of attended robots to trigger (asynchronous and synchronous) unattended robots as part of a single workflow	

Everest Group's remarks on technology vendors

Measure of capability: ● High ○ Low

	Market impact				Vision & capability						
	Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Development & integration	Deployment & maintenance	Product training & support	Commercial model	Overall	
Strengths	●	○	●	○	○	○	○	○	○	○	
Areas of improvement	○	○	○	○	○	○	○	○	○	○	

Strengths

- Vendor 1 has a sturdy vision towards building an integrated digital workforce platform and has expanded RPA, cognitive, and BPM capabilities of its automation platform through in-house investment and partnerships. It also has a vision towards developing a robust learning ecosystem for RPA with eLearning courses, training programs, and university outreach
- It added xxx new enterprise clients in 2017 resulting in about XX% year-on-year growth in its number of clients. Our estimates indicate that it has the highest share of the RPA software market as well as the largest portfolio of enterprise clients. It also has a balanced client portfolio with significant presence across key geographies, industries, process areas, and buyer sizes

Areas of improvement

- While vendor 1 has very strong unattended RPA capabilities, and lends itself very well for automating back-office processes, there is scope to further enhance its attended RPA/RDA capabilities with features such as next-best-action user guidance for XXX XXX
- Vendor 1 is yet to demonstrate considerable market success of XXX. It can focus on building function- / vertical-specific customized templates for XXX to make it more attractive for industries such as CPG and BFSI, and functions such as SCM, where use cases with unstructured data are highly prevalent. Clients also expect the vendor to improve its XXX capabilities (XXX). Its recent addition of NLP capabilities to its XXX is a step in this direction

Research calendar – Service Optimization Technologies (SOT)

Published
 Planned
 Current release

Flagship SOT reports

Release date

Intelligent Document Processing (IDP) – Technology Vendor Landscape with Products PEAK Matrix™ Assessment 2019	March 2019
Intelligent Document Processing (IDP) Annual Report 2019 – Let AI Do the Reading	May 2019
Robotic Process Automation (RPA) – Technology Vendor Landscape with Products PEAK Matrix™ Assessment 2019	June 2019
Robotic Process Automation (RPA) – Technology Vendor Profile Compendium 2019	July 2019
Robotic Process Automation (RPA) Annual Report 2019	Q3 2019
IA in Business Process Services (BPS) – Solution Provider Landscape with PEAK Matrix™ Assessment 2019	Q4 2019
Enterprise RPA Automation Adoption – Pinnacle Model™ Analysis 2019	Q4 2019

Thematic SOT reports

Think Banks Have Gotten the Most Out of Automation? Think Again!	February 2019
Process Mining – The New Juggernaut Driving Digital Transformation	March 2019
Doctors with Robots – True 21st Century Healthcare Provision	March 2019
Intelligent automation: Accelerating from Short-term Wins to Long-term Strategic Business Outcomes	March 2019
Advanced Content Intelligence – Pivotal Technology to Empower the New Age Organization	May 2019
Who Takes on the RPA Mantle?	June 2019
Intelligent Document Processing (IDP) Playbook	Q3 2019
AI in Business – A Primer	Q4 2019
AI in Internet of Things (IoT)	Q4 2019

Note: For a list of all of our published SOT reports, please refer to our [website page](#)

Additional SOT research references

The following documents are recommended for additional insight into 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. Robotic Process Automation (RPA) – Technology Vendor Landscape with Products PEAK Matrix™ Assessment 2019** ([EGR-2019-38-R-3217](#)); 2019. Robotic Process Automation (RPA) is a key enabler of enterprise automation. This report uses Everest Group's proprietary PEAK Matrix™ to assess and evaluate RPA capabilities of independent software vendors across two key dimensions, market impact and vision & capability. It also includes competitive landscape & market share analysis, Everest Group's remarks on technology vendors highlighting their key strengths & areas of improvement, assessment of vendors' attended RPA / RDA capabilities, and insights into advances in RPA technologies
- 2. Intelligent Document Processing (IDP) – Technology Vendor Landscape with Products PEAK Matrix™ Assessment 2019** ([EGR-2019-38-R-3101](#)); 2019. This report uses Everest Group's proprietary PEAK Matrix™ to assess and evaluate IDP software products of 16 technology vendors across two key dimensions – market impact as well as vision and capability. It also includes IDP competitive landscape, Everest Group's remarks on IDP technology vendors highlighting their key strengths and areas of improvement, and IDP product capability trends and predictions
- 3. Smart RPA Playbook** ([EGR-2018-38-R-2824](#)). Smart RPA, which blends both RPA and AI capabilities, is a core competency that can successfully enable digital transformation for enterprises. Using a five-step approach to adopt, expand, and scale Smart RPA deployments, this Playbook taps various frameworks, such as Everest Group's Pinnacle Model™ and Capability Maturity Model (CMM), to empower enterprises to conceptualize where they want to go with enterprise automation, what capabilities they need to develop to get there, and the ideal path for their journeys

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