Everest Group®
RESEARCH

Process Mining – Technology Vendor Profile Compendium 2020

Service Optimization Technologies (SOT)
Market Report – April 2020: Complimentary Abstract / Table of Contents

Our research offerings for global services

- Market Vista™
  Global services tracking across functions, sourcing models, locations, and service providers – industry tracking reports also available

- Application Services
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- Service Optimization Technologies

More about membership

In addition to a suite of published research, a membership may include

- Accelerators™
- Analyst access
- Data cuts
- Pinnacle Model® reports
- PriceBook
- Virtual Roundtables
- Workshops

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

Membership information

- This report is included in the following research program(s)
  – Service Optimization Technologies (SOT)
- If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at info@everestgrp.com

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Background of the research

The process automation market is evolving in more ways than one, with many organizations taking the next step of complementing Robotic Process Automation (RPA) with Artificial Intelligence (AI) solutions such as virtual agents and intelligent document capture. Process automation is driving the need for enterprises to review and optimize processes and gain insights before automating them, in turn fueling demand for technologies such as process mining. While the concept of process mining has been around as a topic of academic interest, it is quite nascent in the landscape of enterprise automation and digital transformation. Based on the approach adopted to collect data, process mining can be classified into two categories – classic process mining and desktop process mining. Classic process mining solutions leverage event logs generated by information systems such as ERP, CRM, HCM, and SCM to reconstruct a virtual view of the business process. Desktop process mining solutions leverage user-action recording / screen recording to generate process maps and derive relevant business insights for process improvement. Process mining blends the power of data-based analysis techniques, such as data mining and machine learning, to help organizations discover the as-is process along with its variants and identify process optimization/automation opportunities. While process mining can play a key role in the success of an organization's optimization/transformation journey, process mining technologies are relatively new to many potential buyers in terms of product capabilities, features, and commercial models. The technologies are also evolving, with an expanding feature set and increasing richness of functionality.

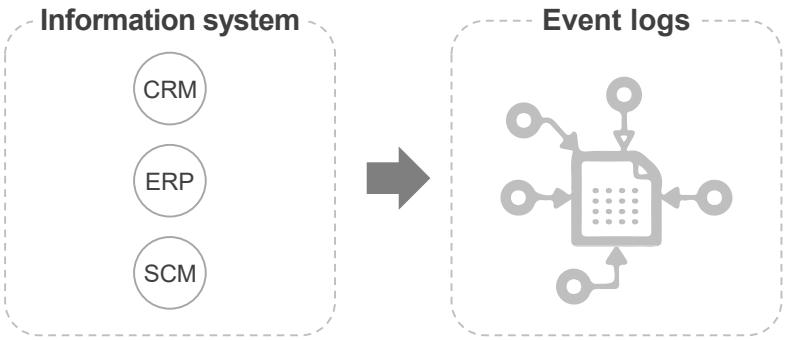
This report focuses on technology vendor profile of classic process mining vendors.

Each technology vendor profile covers the following details of vendors vis-à-vis their process mining 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

Understanding classic process mining

Classic process mining solutions are software products that leverage specialized algorithms to analyze event logs generated by enterprise systems, to derive meaningful process insights



- Data mining
- Sequence mining
- Clustering
- Association rules mining
- AI/ML

- **Process discovery**
- **Process conformance**
- **Process intelligence**

Input	Data analysis techniques	Output
Information systems such as ERP, CRM, and SCM capture every action performed in the form of event logs. Classic process mining solutions apply specialized algorithms to analyze these event logs to reconstruct as-is processes.	Classic process mining uses specialist software to examine and analyze process-related information that is captured in event logs generated by enterprise systems. By analyzing the logs, the software discovers and maps processes; in other words, it works out process flows, step repetitions, variations, and the most efficient versions of each process. For conformance checking, discovered process maps are compared with pre-defined input reference process models.	Process discovery results in a process map with different process variants. Process step information such as frequency, cost, and resources consumed are displayed in the process maps Conformance checking provides insights into the deviations/violations in the discovered process as compared to the input reference model Process intelligence involves monitoring processes in near real-time and generating insights for process improvement.

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

Proprietary database of 13 process mining technology vendors
The database tracks the following elements for each vendor:
- Process setup, preparation, and integration
- Process discovery and intelligence
- 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 process mining 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 process mining buyers to understand:
  - Vision and objectives
  - Buying criteria
  - Apprehensions and challenges
  - Outcomes achieved
  - Future direction

Proprietary database of RPA and AI capabilities of 50+ leading technology vendors and 20+ 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 partnerships and collaborations with academic institutes

Vendors covered in the analysis

ABBYY Timeline
apromore
celonis
EVERFLOW
LANA LABS
logpickr
minit
myinvenio
paf now
PUZZLE DATA
QPR
software AG
UiPath

The study provides detailed view of vendors' process mining 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

Service provider	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	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 9									

Technology vendor's overview

Company overview

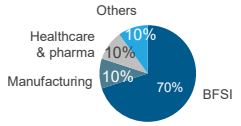
Vendor 1 is a U.S.-based process mining software vendor. Established in xxx, the company provides solutions to provide insights on business processes through process mining and smart automation / cognitive technologies (leveraging machine learning natural language processing capabilities), enabling companies 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

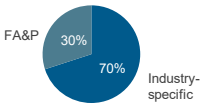
Non-exhaustive list of recent deals and announcements

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

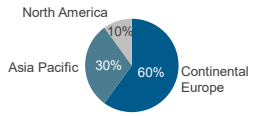
Split of process mining revenue by buyer industry



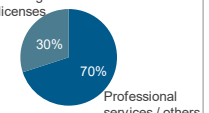
Split of process mining revenue mix by process area



Split of process mining revenue by buyer geography



Split of process mining revenue by offerings



Product features and functionalities

Capability & offerings

Available | In the roadmap | Available via formal partnership | Not available

Process monitoring and reporting	Ability to create customized dashboards based on user requirements / user-defined query	Ability to support text search capability in the process map	Ability to monitor processes in near real-time against defined KPIs	Ability to compare multiple process variants visually on defined metrics				
	Ability to define scenarios and run multiple simulations (what-if analysis / scenario testing)	Ability to share complete analysis project with other users through project file export	Ability to add notes for process steps to record derived insights					
Predictive and prescriptive analytics	Ability of the software to identify and recommend optimal process variants	Ability to estimate lead time and predict delays based on real-time process information	Ability to use AI/ML to predict and highlight / warn business users of any expected KPI breach					
	Ability to automatically send notifications to users in case of any expected KPI breach	Ability to identify and recommend processes/tasks for automation	Ability to recommend tools to automate processes, e.g., RPA, chatbots or IDP					
Commercial model	Perpetual licensing	Subscription licensing	User-based licensing	Process-based licensing	Event logs- / server capacity-based licensing			
Hosting options	Desktop/laptop	Server/on-premise	Private cloud	Public cloud	Supports multi-tenant deployment	Supports containerization	Own hosting services	Hosting services offered via partners
Product training and support	Training and certifications by vendor	Training and certifications by partners	Classroom training	Online portal for process mining training/certification	Online self-paced training modules	Separate training courses for different user roles		
	Online certification courses	Availability of a community edition of the product	Free training modules	Interactive online training	Embedded help tool	Online user community		
Security and compliance	Availability of pre-built algorithms in system connectors to encrypt/decrypt data from event logs	Ability to create different environments of event logs with restricted user access authorization						
	Availability of role-based access to the system	Ability to selectively grant permissions to view attributes of a process model	Availability of an anonymization option for any specific attributes in log data	Active directory integration				

Everest Group's remarks on technology vendors

Measure of capability: High Low

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process setup & integration	Process intelligence	Commercial model	Overall

Strengths

- Technology vendor1 added XXX new enterprise clients in 2019 resulting in about XX% year-on-year growth in its number of clients. Our estimates indicate that it has the highest share of the process mining 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
- It offers connectors to integrate with leading enterprise information systems (XXX). Clients rate it highly for its scalability. It has also partnered with system integrators such as XXX for developing libraries of pre-built automations

Areas of improvement

- While XXX has very strong unattended process discovery 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
- XXX 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
Enterprise IA Automation Adoption – Pinnacle Model® Analysis 2019	December 2019
Intelligent Automation in Business Processes (IABP) Solution Provider Landscape with PEAK Matrix® Assessment 2020	February 2020
Process Mining – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2020	February 2020
IA in Business Process Services (BPS) – Solution provider compendium 2020	March 2020
Conversational AI – Technology Vendor Landscape with Products PEAK Matrix Assessment	March 2020
Intelligent Document Processing (IDP) – Technology Vendor Landscape with Products PEAK Matrix Assessment	March 2020
Process Mining – Technology Vendor Profile Compendium 2020	**April 2020**
Intelligent Document Processing (IDP) – Technology Vendor Profile Compendium 2020	Q2 2020

Thematic SOT reports	
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	September 2019
360-degree Enterprise Automation Playbook	Q2 2020
Intelligent Automation Orchestration	Q2 2020

Note: For a list of all of our published SOT reports, please refer to our website page

Everest Group® RESEARCH

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. **Process Mining – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2020** (EGR-2020-38-R-3576); 2020. While the concept of process mining has been around as a topic of academic interest, it has recently gained currency in the context of enterprise automation and digital transformation. Process mining solutions leverage event logs generated by information systems such as ERP, CRM, HCM, and SCM to reconstruct a virtual view of a business process. This report uses Everest Group's proprietary PEAK Matrix® to assess and evaluate process mining capabilities of 13 independent software vendors across two key dimensions, market impact and vision & capability. It also contains a section on assessment of Desktop Process Mining vendors

2. **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

3. **Smart RPA Playbook** (EGR-2018-38-R-2824); 2018. 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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Everest Group®

About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empower clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at www.everestgrp.com.

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