

Process Mining – Technology Vendor Compendium 2021

July 2021: Complimentary Abstract / Table of Contents



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custom research capabilities

Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: service providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

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Background of the research

Background of the research

Everest Group defines Process Mining (PM) as a software product that involves a fact-based approach to help discover, monitor, and optimize as-is processes by analyzing process-related information from event logs generated by information systems (ERP, CRM, etc.) and/or recordings of activities performed by users on their desktops. Process mining has been one of the fastest growing markets in the intelligent automation space over the past few years. Adoption of process mining solutions can not only help enterprises achieve cost savings and operational efficiency by identifying process optimization/automation opportunities, but also improve workforce productivity and enhance customer experience.

In this study, we assess process mining software products in the market that can analyze process-related information captured in event logs to discover process models, and which are available for independent licensing. The objective of this report is to provide key stakeholders a snapshot of the process mining offerings and capabilities of technology vendors. In this report, we feature detailed profiles of 18 leading process mining technology vendors to assist process mining buyers in selecting vendors that can serve their needs. It also allows technology vendors to compare their offerings, capabilities, strengths, and limitations with other vendors in the marketplace.

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

- Company overview
- Recent deals & announcements
- Market adoption & client portfolio mix
- Product overview & partnerships
- Product features & functionalities and key enhancements
- Measure of capabilities across PEAK Matrix® dimensions
- Key strengths & limitations for technology vendors

Scope of this report:



Products
Process mining



Geography
Global



Technology vendors
18 leading process mining
technology vendors

Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

01

Robust definitions and frameworks

Function-specific pyramids, Total Value Equation (TVE), PEAK Matrix®, and market maturity

02

Primary sources of information

Annual RFIs, vendor briefings & buyer interviews, and web-based surveys

03

Diverse set of market touchpoints

Ongoing interactions across key stakeholders, input from a mix of perspectives and interests, supports both data analysis and thought leadership

04

Fact-based research

Data-driven analysis with expert perspectives, trend-analysis across market adoption, contracting, and vendors

Proprietary database on process mining capabilities of 18+ technology vendors

Repository of existing research in process mining


Dedicated team for process mining research

Executive-level relationships with buyers, service providers, technology providers, and industry associations

Focus of the research

Process mining solutions can be grouped into three categories, depending on the nature of data leveraged and scope of insights generated

Process mining involves a fact-based approach to help discover, monitor, and optimize as-is processes by analyzing process-related information from event logs generated by information systems (ERP, CRM, etc.) and/or recordings of activities performed by users on their desktops.

 Classic process mining and hybrid process mining vendors have been assessed on the PEAK Matrix®

Types of process mining



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

Proprietary database of 18 process mining technology vendors

- The database tracks the vendors’ offerings/capabilities for:
 - Process setup, data preparation, and integration
 - Process discovery, conformance, and monitoring features
 - Deployment and hosting options
 - Partnerships with service providers and other technology vendors
 - Product-related training and support services
 - Availability and adoption of commercial model(s)
 - IT governance and security

Proprietary operational information database of technology vendors (updated annually)

- The database tracks the following operational information for each vendor:
 - Revenue and number of FTEs
 - Number of clients
 - FTE split by different lines of business
 - Portfolio coverage in terms of industry, geography, process areas, and buyer size

Demonstrations and interactions with technology vendors and other industry stakeholders

- Detailed demos for a comprehensive product view and executive-level discussions with process mining vendors that cover:
 - Current state of the market
 - Vision and strategy
 - Annual performance and outlook
 - Opportunities and challenges
 - Emerging areas of investment

Buyer reference interviews, ongoing buyer surveys, and interactions

- Interviews with technology vendors’ reference clients and enterprise process mining buyers to get the buyer perspective around:
 - Drivers and objectives for adopting process mining
 - Apprehensions and challenges
 - Assessment of vendors’ performance
 - Emerging priorities / buying criteria
 - Outcomes achieved
 - Lessons learnt and best practices

Vendors assessed¹



¹ In this study, we have assessed vendors’ offerings / product capabilities as of December 2020. Analyses for Signavio and myInvenio are based on their capabilities before they were acquired by SAP and IBM, respectively
The source of all content is Everest Group unless otherwise specified

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any contract-specific information collected will only be presented back to the industry in an aggregated fashion

This study provides detailed view of vendors’ process mining offerings & capabilities as well as key strengths and limitations; below are four charts to illustrate the depth of the report

Assessment of capability and market impact

Measure of capability: ● Low ● High

Technology Vendor	Market impact				Vision & capability						
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process setup and integration	Process intelligence	Implementation and support	Commercial and sales 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 mission/vision statement

xxxx aims to enable its customers improve operational efficiency and agility by helping them analyze, monitor, and model business operations. Its offering includes xxxx for process mining, xxxx Metrics for performance management, designer for business process analysis, and architect for business design. The company holds several patents in the US for its process mining technology.

Key leaders

- xxxx
- Xxxx

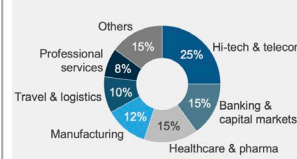
Headquarters: xxxx

Key clients include: xxxx
Website: xxxx

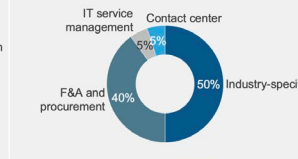
Recent deals and announcements (not exhaustive)

- Month Year: xxxx
- Month Year: xxxx
- Month Year: xxxx
- Month Year: xxxx

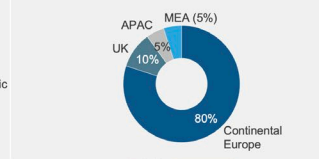
Split of process mining revenue by buyer industry



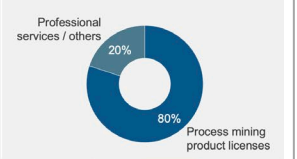
Split of process mining revenue by process areas



Split of process mining revenue by buyer geography



Split of process mining revenue by offerings



Product features and functionalities

Capability & offerings

Measure of capability: ● Low ● High

	Available	In the roadmap	Available via partner	Not available
Conformance checking	Ability to import BPMN models to define standard model	Ability to define target process workflow through a built-in process modeler	Out-of-the-box process templates based on industry best practices (e.g., for O2C, P2P)	Ability to perform gap analysis to identify (un-) desirable deviances/violations
	Ability to perform root-cause analysis to identify causes of process path deviations	Ability to check compliance rules such as segregation of duties		
Process monitoring and reporting	Ability to support text search capability in the process map	Ability to monitor processes in near real-time against defined KPIs	Ability to estimate lead time and predict delays based on near real-time process information	Ability of the software to identify optimal process variant
	Ability to create custom metrics to identify optimal process variant, by using functions	Ability to create PDD for the discovered process and add notes for process steps	Ability to share and export project analysis with other users	
Process enhancement	Ability to use AI/ML to predict and highlight any potential KPI breach	Ability to automatically send notifications to users in case of expected KPI breach	Ability to define scenarios and run multiple simulations (what-if analysis / scenario testing)	Ability to leverage AI/ML to recommend possible simulation scenarios
	Ability to save virtual logs of simulated process models to aid comparative analysis	Ability to automatically identify processes/tasks for automation	Ability to directly export workflows to automation platform's design studio	
Desktop process mining / task mining	Built-in process recorder – DOM/COM-based	Built-in process recorder – image-based	Ability to blacklist/whitelist applications for recording	Ability to leverage ML algorithms to classify tasks that belong to a particular process
	Ability to provide workforce intelligence insights/recommendation	Ability to automatically mask PII data in captured screenshots or recorded data		
Security and compliance	Availability of pre-built algorithms in system connectors to encrypt/decrypt event log data	Ability to create different environments 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: ● Low ● High

Market impact				Vision & capability						
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process setup and integration	Process intelligence	Implementation and support	Commercial and sales model	Overall	
●	●	●	●	●	●	●	●	●	●	
Strengths					Limitations					
<ul style="list-style-type: none"> • Technology vendor 1 has a vision to help enterprises become more agile and efficient in their operations by providing software solutions for process modeling, performance management, and process mining • It leverages AI-based clustering to offer key process discovery features such as variant analysis to identify optimal process variant, anomaly detection, decision rule extraction, multi-level process mining, and organization-level relationship mining 					<ul style="list-style-type: none"> • The majority of technology vendor 1’s clientele is from Continental Europe, and its presence in other key geographies such as North America and APAC is relatively low • Its client portfolio is skewed toward mid-size and large enterprise segments with revenue greater than US\$1 billion. It has relatively lower experience of serving clients in the small enterprise and SMB segments 					

Research calendar

Service Optimization Technologies (SOT)

Published Planned Current release

Flagship reports

Release date

An Evolving Digital Workforce to Assist Humans – Robotic Process Automation (RPA) State of the Market Report 2021	December 2020
Intelligent Process Automation (IPA) – Solution Provider Landscape with Solutions PEAK Matrix® Assessment 2021	March 2021
Intelligent Document Processing (IDP) – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2021	April 2021
Process Mining – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2021	June 2021
Intelligent Process Automation (IPA) – State of the Market Report 2021	June 2021
Process Mining – Technology Vendor Compendium 2021	July 2021
Process Mining – State of the Market Report 2021	Q3 2021
Conversational AI – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2021	Q3 2021

Thematic reports

Release date

Accelerated Intelligent Automation (AIA) in Enterprises	May 2020
The 360-degree Enterprise Automation Playbook	May 2020
AI Start-ups Redefining Business Processes: Top 30 Trailblazers	December 2020
Understanding Cloud-native RPA	January 2021
Mine Your Journey to Digital Excellence	March 2021
Intelligent Document Processing (IDP) Playbook 2021	May 2021
Process Mining Playbook 2021	June 2021

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



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