Everest Group®

Provider Compendium | Service Optimization Technologies

Task Mining – Technology Provider Compendium 2022

September 2022: Complimentary Abstract / Table of Contents

EGR-2022-38-CA-5473

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Service Optimization Technologies, Process Mining

- Application Services
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- Banking and Financial Services Information Technology
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- Contingent Workforce Management
- Conversational AI
- Customer Experience Management Services
- CX Excellence
- Cybersecurity
- Data and Analytics
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- Digital Engineering Services
- Digital Services
- Digital Workplace
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- Software Product Engineering Services
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- Trust and Safety
- Work at Home Agent (WAHA) Customer Experience Management (CXM)

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- Peer analysis
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- Tracking: providers, locations, risk, technologies
- Locations: costs, skills, sustainability, portfolios

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For more information on this and other research published by Everest Group, please contact us:

Amardeep Modi, Vice President

Harpreet Makan, Practice Director

Anish Nath, Practice Director

Veer Kapadia, Senior Analyst

Santhosh Kumar, Senior Analyst

Shreepriya Sinha, Senior Analyst

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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 pyramid, Total Value Equation (TVE), PEAK Matrix®, and market maturity

02

Primary sources of information

Annual RFIs, provider briefings and buyer interviews, 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 providers

Proprietary database on task mining capabilities of 17+ technology providers

Year-round tracking of 17+ task mining providers

Large repository of existing research in task mining

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

Background of the research

Background of the research

Everest Group defines task mining as a type of software product that can capture user actions and metadata, such as keystrokes, mouse clicks, activity screenshots, and potentially other system-level activities, performed together on multiple desktops to discover tasks and provide insights into the tasks and activities involved in executing a process. The technology provides a data-based approach to process optimization and automation through different applications and use cases spanning industries and process areas. This has led to task mining being one of the fastest-growing markets in the Intelligent Automation (IA) space. Adoption of task mining solutions can not only help enterprises achieve cost savings and operational efficiencies by optimizing/automating tasks, but also enhances employee experience through better resource allocation. While task mining can play a key role in the success of an organization's digital transformation journey, task mining technology is relatively new to many potential buyers in terms of product capabilities, features, and commercial models.

In this study, we assess task mining software products that can capture user actions and metadata performed together on multiple desktops to virtually reconstruct and analyze processes and are available independent of professional services. The objective of this report is to provide key stakeholders with a snapshot of the task mining offerings and capabilities of technology providers. In this report, we feature detailed profiles of 17 leading task mining technology providers to assist task mining buyers in selecting providers that can best serve their needs. It also allows technology providers to compare their offerings, capabilities, strengths, and limitations with other providers in the marketplace.

Each technology provider profile covers the following details of providers vis-à-vis their task 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 providers

Scope of this report

Geography
Global

Technology providers
17 leading task mining technology providers

Product
Task mining

Types of process intelligence solutions

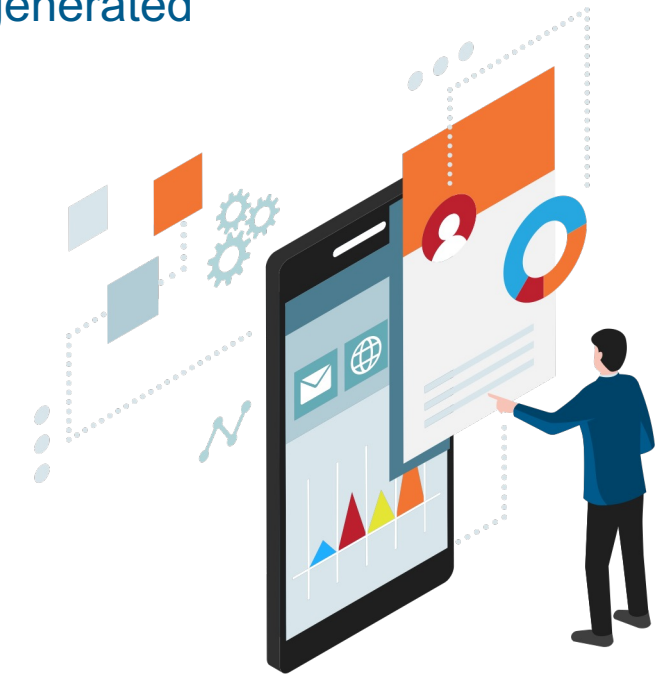
Process intelligence solutions can either include or be grouped into two categories, depending on the nature of data leveraged and the scope of insights generated

Types of process intelligence

Focus of this research

Process mining

Process mining solutions capture process-related information from event logs generated by enterprise systems, such as ERP, CRM, and Supply Chain Management (SCM), to discover and analyze as-is processes; process mining is primarily carried out at a macro level.



Task mining

Task mining captures process-related information through UI activities[1] to provide insights into the tasks and activities involved in executing a process; it is primarily carried out at a micro level.

Initial pilot → Early adoption → Industry adoption

Current market adoption and maturity of these technologies

Initial pilot → Early adoption → Industry adoption

1 User actions and metadata, such as keystrokes, mouse clicks, activity screenshots, and application object IDs, are captured/recorded across desktops to create UI logs

Note: In this research, process mining is considered as a complementary capability for task mining solutions

This report is based on multiple key sources of proprietary information

Proprietary database of 17 task mining technology providers

- The database tracks the following elements of each provider:
  - Data collection and preparation
  - Task discovery, insights, and monitoring features
  - Deployment and hosting options
  - Partnerships with service providers and other technology providers
  - Product-related training and support services
  - Availability and adoption of commercial model(s)
  - IT governance and security

Proprietary operational information database of technology providers (updated annually)

- The database tracks the following for each provider:
  - Revenue and number of FTEs
  - Number of clients
  - FTE split by different Lines of Business (LoBs)
  - Portfolio coverage in terms of industry, geography, process areas, and buyer size

Demonstrations and interactions with technology providers and other industry stakeholders

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

Buyer reference interviews, ongoing buyer surveys, and interactions

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

Providers assessed[1]

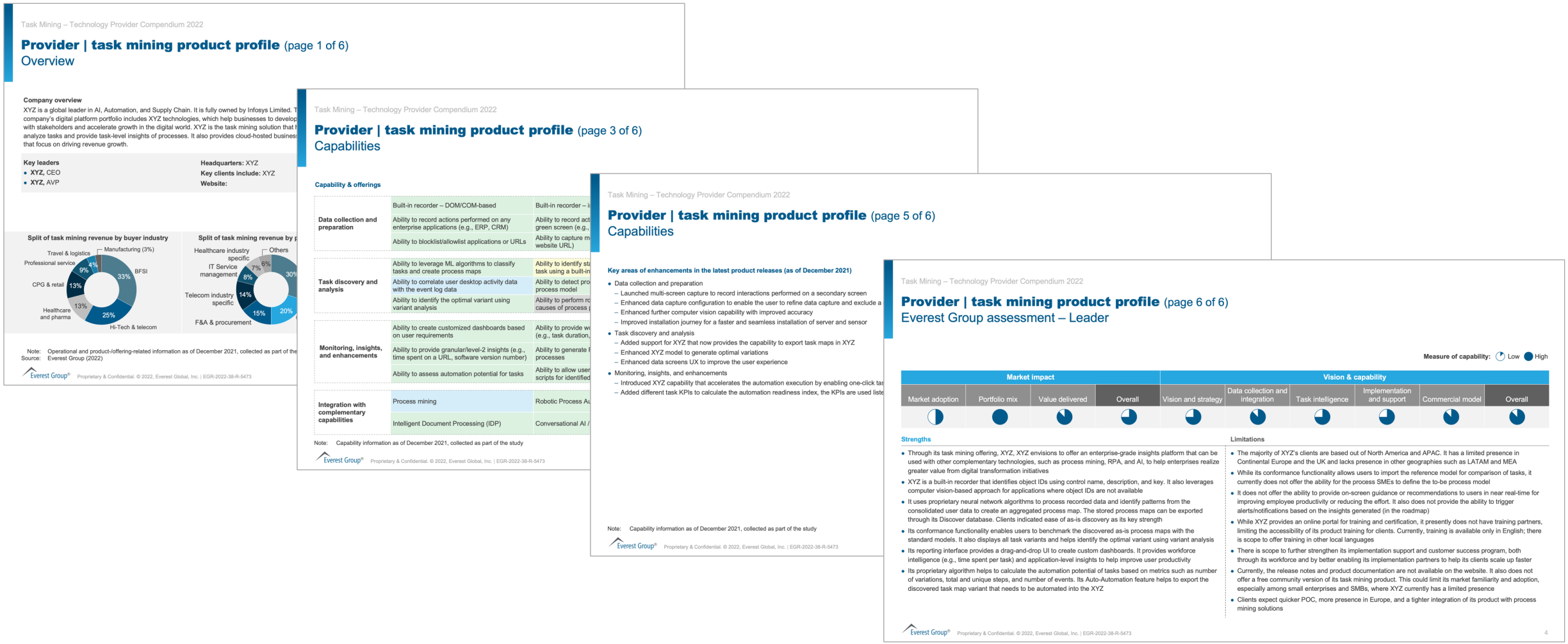
ABBYY, Automation Anywhere, celonis, edgeverve, epiance, IBM, KYP.ai, MeeCap, mimica, NICE, nintex, Optimus Hive, SkanAI, SOROCO, stereologic, UiPath, ultimate.suite

1 In this study, we have assessed providers' offerings / product capabilities as of December 2021. Analysis for Kryon is based on its capabilities before its acquisition by Nintex

The source of all content is Everest Group unless otherwise specified

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

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



Task Mining – Technology Provider Compendium 2022

Provider | task mining product profile (page 1 of 6)
Overview

Company overview
XYZ is a global leader in AI, Automation, and Supply Chain. It is fully owned by Infosys Limited. T
company's digital platform portfolio includes XYZ technologies, which help businesses to develop
with stakeholders and accelerate growth in the digital world. XYZ is the task mining solution that h
analyze tasks and provide task-level insights of processes. It also provides cloud-hosted busines
that focus on driving revenue growth.

Key leaders
- **XYZ,** CEO
- **XYZ,** AVP

Headquarters: XYZ
Key clients include: XYZ
Website:

Split of task mining revenue by buyer industry

Split of task mining revenue by p

Note: Operational and product-/offering-related information as of December 2021, collected as part of the
Source: Everest Group (2022)

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Task Mining – Technology Provider Compendium 2022

Provider | task mining product profile (page 3 of 6)
Capabilities

Capability & offerings

Data collection and preparation	Built-in recorder – DOM/COM-based	Built-in recorder – i
	Ability to record actions performed on any enterprise applications (e.g., ERP, CRM)	Ability to record act green screen (e.g.,
	Ability to blocklist/allowlist applications or URLs	Ability to capture m website URL)
Task discovery and analysis	Ability to leverage ML algorithms to classify tasks and create process maps	Ability to identify sta task using a built-in
	Ability to correlate user desktop activity data with the event log data	Ability to detect pro process model
	Ability to identify the optimal variant using variant analysis	Ability to perform ro causes of process
Monitoring, insights, and enhancements	Ability to create customized dashboards based on user requirements	Ability to provide w (e.g., task duration,
	Ability to provide granular/level-2 insights (e.g., time spent on a URL, software version number)	Ability to generate f processes
	Ability to assess automation potential for tasks	Ability to allow user scripts for identified
Integration with complementary capabilities	Process mining	Robotic Process Au
	Intelligent Document Processing (IDP)	Conversational AI /

Note: Capability information as of December 2021, collected as part of the study

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Task Mining – Technology Provider Compendium 2022

Provider | task mining product profile (page 5 of 6)
Capabilities

Key areas of enhancements in the latest product releases (as of December 2021)
- Data collection and preparation
  - Launched multi-screen capture to record interactions performed on a secondary screen
  - Enhanced data capture configuration to enable the user to refine data capture and exclude a
  - Enhanced further computer vision capability with improved accuracy
  - Improved installation journey for a faster and seamless installation of server and sensor
- Task discovery and analysis
  - Added support for XYZ that now provides the capability to export task maps in XYZ
  - Enhanced XYZ model to generate optimal variations
  - Enhanced data screens UX to improve the user experience
- Monitoring, insights, and enhancements
  - Introduced XYZ capability that accelerates the automation execution by enabling one-click tas
  - Added different task KPIs to calculate the automation readiness index, the KPIs are used liste

Note: Capability information as of December 2021, collected as part of the study

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Task Mining – Technology Provider Compendium 2022

Provider | task mining product profile (page 6 of 6)
Everest Group assessment – Leader

Measure of capability: Low High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Data collection and integration	Task intelligence	Implementation and support	Commercial model	Overall

Strengths
- Through its task mining offering, XYZ, XYZ envisions to offer an enterprise-grade insights platform that can be used with other complementary technologies, such as process mining, RPA, and AI, to help enterprises realize greater value from digital transformation initiatives
- XYZ is a built-in recorder that identifies object IDs using control name, description, and key. It also leverages computer vision-based approach for applications where object IDs are not available
- It uses proprietary neural network algorithms to process recorded data and identify patterns from the consolidated user data to create an aggregated process map. The stored process maps can be exported through its Discover database. Clients indicated ease of as-is discovery as its key strength
- Its conformance functionality enables users to benchmark the discovered as-is process maps with the standard models. It also displays all task variants and helps identify the optimal variant using variant analysis
- Its reporting interface provides a drag-and-drop UI to create custom dashboards. It provides workforce intelligence (e.g., time spent per task) and application-level insights to help improve user productivity
- Its proprietary algorithm helps to calculate the automation potential of tasks based on metrics such as number of variations, total and unique steps, and number of events. Its Auto-Automation feature helps to export the discovered task map variant that needs to be automated into the XYZ

Limitations
- The majority of XYZ's clients are based out of North America and APAC. It has a limited presence in Continental Europe and the UK and lacks presence in other geographies such as LATAM and MEA
- While its conformance functionality allows users to import the reference model for comparison of tasks, it currently does not offer the ability for the process SMEs to define the to-be process model
- It does not offer the ability to provide on-screen guidance or recommendations to users in near real-time for improving employee productivity or reducing the effort. It also does not provide the ability to trigger alerts/notifications based on the insights generated (in the roadmap)
- While XYZ provides an online portal for training and certification, it presently does not have training partners, limiting the accessibility of its product training for clients. Currently, training is available only in English; there is scope to offer training in other local languages
- There is scope to further strengthen its implementation support and customer success program, both through its workforce and by better enabling its implementation partners to help its clients scale up faster
- Currently, the release notes and product documentation are not available on the website. It also does not offer a free community version of its task mining product. This could limit its market familiarity and adoption, especially among small enterprises and SMBs, where XYZ currently has a limited presence
- Clients expect quicker POC, more presence in Europe, and a tighter integration of its product with process mining solutions

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Research calendar

Service Optimization Technologies (SOT)

Published | Planned | Current release

Reports title	Release date
Stepping into the Era of Digital Workers – Robotic Process Automation (RPA) State of the Market Report 2022	December 2021
Process Mining Playbook 2021	June 2021
Defining Attended RPA – What to Look for in an Enterprise-grade Attended RPA Solution?	March 2022
Intelligent Process Automation (IPA) – Solution Provider Landscape with PEAK Matrix® Assessment 2022	March 2022
Intelligent Process Automation (IPA) – Solution Provider Compendium 2022	May 2022
Intelligent Document Processing (IDP) – Technology Provider Landscape with Products PEAK Matrix® Assessment 2022	May 2022
Process Mining – Technology Provider Landscape with Products PEAK Matrix® Assessment 2022	June 2022
Intelligent Document Processing (IDP) – Technology Provider Compendium 2022	June 2022
The Business Case for Process Mining – From Evaluation to Value Realization	June 2022
Intelligent Document Processing (IDP) – State of the Market Report 2022	July 2022
Task Mining – Technology Provider Landscape with Products PEAK Matrix® Assessment 2022	August 2022
Process Mining – State of the Market Report 2022	September 2022
Task Mining – Technology Provider Compendium 2022	**September 2022**
Conversational AI – Technology Provider Landscape with Products PEAK Matrix® Assessment 2022	Q3 2022
Robotic Process Automation (RPA) – Technology Provider Landscape with PEAK Matrix® Assessment 2022	Q4 2022

Note: Click to see a list of all of our published Service Optimization Technologies (SOT) reports

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Dallas (Headquarters)
info@everestgrp.com
+1-214-451-3000

Bangalore
india@everestgrp.com
+91-80-61463500

Delhi
india@everestgrp.com
+91-124-496-1000

London
unitedkingdom@everestgrp.com
+44-207-129-1318

Toronto
canada@everestgrp.com
+1-647-557-3475