

Process Orchestration – Technology Provider Compendium 2023

December 2022: Complimentary Abstract / Table of Contents



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Benchmarking

Contract assessment

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Market intelligence

Tracking: providers, locations,
risk, technologies

Locations: costs, skills,
sustainability, portfolios

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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 contractual and operational 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 process orchestration capabilities of 17+ technology providers

Year-round tracking of 17+ process orchestration providers

Large repository of existing research in process orchestration

Over 30 years of experience advising clients on strategic IT, business services, engineering services, and sourcing

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

Introduction

Everest Group defines Process Orchestration (PO) as software that helps enterprise users design, manage, and monitor end-to-end business processes. It includes key capabilities such as process modeling, business rules management, the ability to design user interfaces for capturing/presenting data, hybrid (human + digital) workforce management, and the ability to provide process-related insights. It should be able to orchestrate the flow of work across human workers, digital workers (such as RPA, IDP, and conversational AI), and enterprise applications in long-running workflows.

For the scope of this study, we cover products in the market that are low-code/no-code and broad-based business process-centric products (not focused on a particular use case / function / industry) and are available for independent licensing. The product should also be capable of handling workflows that may not involve digital workers.

The objective of this report is to provide key stakeholders a snapshot of the process orchestration offerings and capabilities of technology providers. In this report, we feature detailed profiles of 18 leading process orchestration technology providers to assist process orchestration buyers in selecting providers that can 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 process orchestration 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

Scope of this report



Geography
Global



Providers
18 leading process
orchestration technology
providers



Product
Process orchestration

This research is based on multiple sources of proprietary information

Proprietary database of 18 process orchestration technology providers

- The database tracks the following elements of each contract:
 - Process design and business rules management
 - Low-code/No-code user interface, hybrid workforce management
 - Monitoring & analytics, interoperability
 - Partnerships with service providers and other technology providers
 - Deployment and hosting options
 - 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
 - Portfolio coverage in terms of industry, geography, process areas, and buyer size

Demonstrations and interactions with technology providers and other industry stakeholders

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

Buyer reference interviews, ongoing buyer surveys, and interactions

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

Providers assessed¹



¹ Assessment for Bonitasoft, Microsoft, and Pega excludes detailed provider inputs for this particular study and is based on Everest Group's estimates that leverage Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of these technology providers, their public disclosures, and interaction with buyers. For these companies, Everest Group's data for assessment may not be complete

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

Overview and abbreviated summary of key messages

This report features detailed profiles of 18 leading process orchestration technology providers to assist process orchestration buyers in selecting providers that can serve their needs. It also allows technology providers to compare their offerings, capabilities, strengths, and limitations with other providers in the marketplace.

Some of the findings in this report, among others, are:

Process Orchestration Products PEAK Matrix® Assessment 2022

The 2022 process orchestration products PEAK Matrix® positioning is as follows:

- **Leaders:** Appian, Microsoft, and Pega
- **Major Contenders:** AgilePoint, AuraQuantic, Camunda, Enate, EvoluteIQ, FireStart, GBTEC, Kofax, Nintex, PMG, SS&C Blue Prism, and Ultimus
- **Aspirants:** Bonitasoft, JobRouter, and Kissflow

Profiles of process orchestration Leaders, Major Contenders, and Aspirants

Each technology provider profile captures the following details of providers vis-à-vis their process orchestration offerings and capabilities:

- Company overview
- Recent deals and announcements
- Market adoption and client portfolio mix
- Product overview and partnerships
- Product features and functionalities and key enhancements
- Measure of capabilities across PEAK Matrix® dimensions

The process orchestration compendium report has over 18 provider profiles; attached below are the charts to illustrate the depth of the report

Process Orchestration – Technology Provider Compendium 2023

Summary dashboard | market impact and vision & capability assessment of providers for process orchestration product profile

Major Contenders

Providers	Market adoption	Portfolio mix	Value delivered
Provider 1			
Provider 2			
Provider 3			
Provider 4			
Provider 5			
Provider 6			
Provider 7			
Provider 8			
Provider 9			

Note: The value delivered score and overall PEAK Matrix positioning

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Process Orchestration – Technology Provider Compendium 2023

Provider 1 | process orchestration product profile (page 1 of 7)

Overview

Company overview
 XXX provides a low-code platform, which combines process m into a unified platform. It enables customers to discover, design company also offers professional and customer support service including financial services, insurance, healthcare, life sciences

Key leaders
 • XXX
 • XXX
 • XXX

Headquarter
 • XXX

Key client
 • XXX

Website: >

Split of process orchestration revenue by buyer industry

Buyer Industry	Percentage
Healthcare & pharma	2%
CPG & retail	15%
Government and public sector	15%
Banking & capital markets	18%
Manufacturing	21%
Insurance	26%
Others	3%

Note: Operational and product-offering-related information as of M Source: Everest Group (2022)

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Process Orchestration – Technology Provider Compendium 2023

Provider 1 | process orchestration product profile (page 4 of 7)

Capabilities

Capability & offerings

- Monitoring and analytics**
 - Monitor the real-time progress of p against defined KPIs or metrics
 - Ability to create customized dashb
- Interoperability**
 - Availability of pre-built connectors v enterprise applications
 - Availability of pre-built connectors v mining platforms
- Security and compliance**
 - Ability to configure custom data ret policies
 - Ability to maintain an audit trail of a to minimize compliance risk
- Complementary capabilities**
 - Robotic Process Automation (RPA)
 - Task mining
- Product architecture and hosting options**
 - On premises (central server or virt
 - Supports multi-tenant deployments

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Process Orchestration – Technology Provider Compendium 2023

Provider 1 | process orchestration product profile (page 6 of 7)

Everest Group assessment – M

Market impact

Market adoption	Portfolio mix	Value delivered

Strengths

- XXXX aims to offer a modern, easy-to-use, and intuitive solut
- It has a balanced portfolio with an experience of serving client
- XXX's process orchestration platform, offers an intuitive inter quick modeler function that automatically suggests next symb
- The platform supports BPMN 2.0 and DMN notation and has trees are part of the integrated DMN package
- It has a pre-built repository of business rules and the capabili authors can be controlled in the process
- The platform offers a unified interface to access the repositor automating compliance, audit, and risk processes
- The platform has an interface to assign tasks/cases in near re
- The platform comes with monitoring and analytics component bottlenecks in the process, and recommends automation opp
- The product can be hosted on-premise as well as on public a
- Clients have appreciated the integration between process de

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Process Orchestration – Technology Provider Compendium 2023

Provider 1 | process orchestration product profile (page 7 of 7)

Everest Group assessment – Major Contender

Market impact

Market adoption	Portfolio mix	Value delivered	Overall

Vision & capability

Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall

Measure of capability: Low High

Limitations

- A significantly large share of its clientele is from Continental Europe. It has limited presence in other geographies, especially in the UK and LATAM regions
- It has limited experience in serving SMBs and small enterprises with revenue less than US\$1 billion as most of its revenue comes from large clients with revenue more than US\$5 billion
- While it has good functionalities for managing business rules in its platform, a low-code/no-code design environment for generating custom predictive rules is currently not available. However, the platform offers capabilities to configure a connection with Google AI platform to run such advanced algorithms externally
- The platform provides low-code/no-code interface for application development; however, there is scope to add advanced application development capabilities such as AI-based automated testing of developed applications
- The platform offers the capability to auto check-in. Currently, the platform uses existing process information to calculate the right interval for follow-up based on due dates and delays that are detected. Hybrid workforce management capability can be enhanced by introducing AI-powered calculation of follow-ups, which is in the roadmap
- Hybrid workforce management capabilities can be further improved through the availability of inbuilt algorithms to optimize and balance workloads between the digital workforce and human workforce
- Currently, its customers can use process mining predictive capabilities to analyze processes. Such analytical capabilities can be enhanced by developing predictive maintenance functionalities through AI-ML-based models. This feature is part of the roadmap
- While the platform enables security and compliance in client organizations, inbuilt credential vaults are in the roadmap and not yet available for customers. Out-of-the-box integration with specialized providers of credential vaults is also not available
- It lacks built-in complementary capabilities such as RPA and IDP. However, such functionalities are made available through formal partnerships with relevant providers
- Clients have highlighted a scope for improvement in features related to the escalation of overdue tasks and notifications/reminders to users for pending items or updates

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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
Defining Attended RPA – What to Look for in an Enterprise-grade Attended RPA Solution?	March 2021
Intelligent Process Automation (IPA) – Solution Provider Landscape with PEAK Matrix® Assessment 2022	March 2021
Intelligent Document Processing (IDP) – Technology Provider Landscape with Products PEAK Matrix® Assessment 2022	May 2021
Process Mining – Technology Provider Landscape with Products PEAK Matrix® Assessment 2022	June 2021
The Business Case for Process Mining – From Evaluation to Value Realization	June 2021
A New Era of Business Process Innovation – Intelligent Processes Automation (IPA) State of the Market Report 2022	June 2021
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
Wear an Analytical Lens to Optimize Processes – Process Mining State of the Market Report 2022	September 2022
Task Mining – State of the Market Report 2023	October 2022
Robotic Process Automation (RPA) – Technology Provider Landscape with PEAK Matrix® Assessment 2023	October 2022
Process Orchestration – Technology Provider Landscape with PEAK Matrix® Assessment 2023	November 2022
Process Orchestration – Technology Provider Compendium 2023	December 2022
Robotic Process Automation (RPA) – State of the Market Report 2023	Q1 2023

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



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