

# Process Orchestration Products PEAK Matrix® Assessment 2023 – Update

November 2023: Complimentary Abstract / Table of Contents



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Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

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## Background of the research

Everest Group defines Process Orchestration 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.

In this research, we present an assessment of 24 technology providers featured on the process orchestration products PEAK Matrix®. The assessment is based on Everest Group’s annual RFI process for the calendar year 2023, interactions with leading technology providers, client reference checks, and ongoing analysis of the process orchestration software market.

### In this study, we analyze the process orchestration technology landscape across various dimensions:

- Everest Group’s PEAK Matrix® evaluation, a comparative assessment of 24 leading process orchestration technology providers
- Competitive landscape in the process orchestration technology provider market
- Key process orchestration technology trends
- Remarks on key strengths and limitations for each process orchestration technology provider

#### Scope of this report



**Geography**  
Global



**Providers**  
24 leading process  
orchestration technology  
providers



**Product**  
Process orchestration

# This research is based on multiple sources of proprietary information

## Proprietary database of 24 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 Full-time Equivalent (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 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 assessed<sup>1</sup>



<sup>1</sup> Assessment for Microsoft, Oracle, Pega, Salesforce, SAP, Ultimus, and Zoho 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 contract-specific information collected will only be presented back to the industry in an aggregated fashion

# A holistic process orchestration software comprises various components that help enterprises manage and govern end-to-end business processes

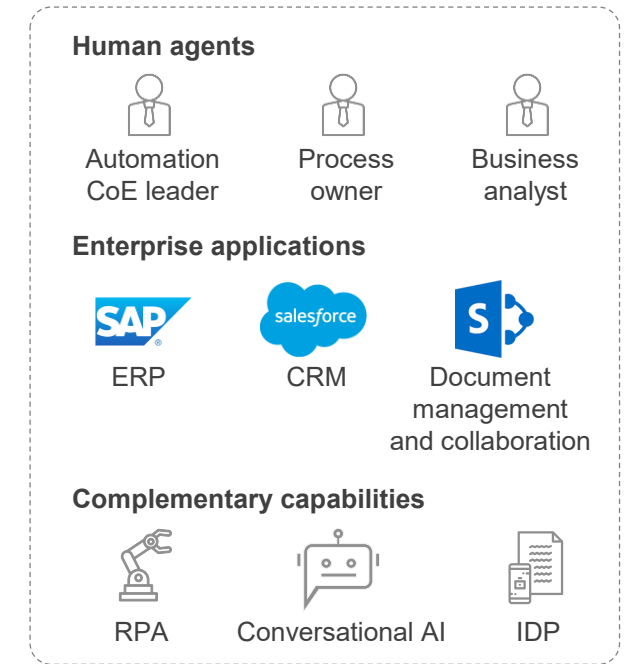
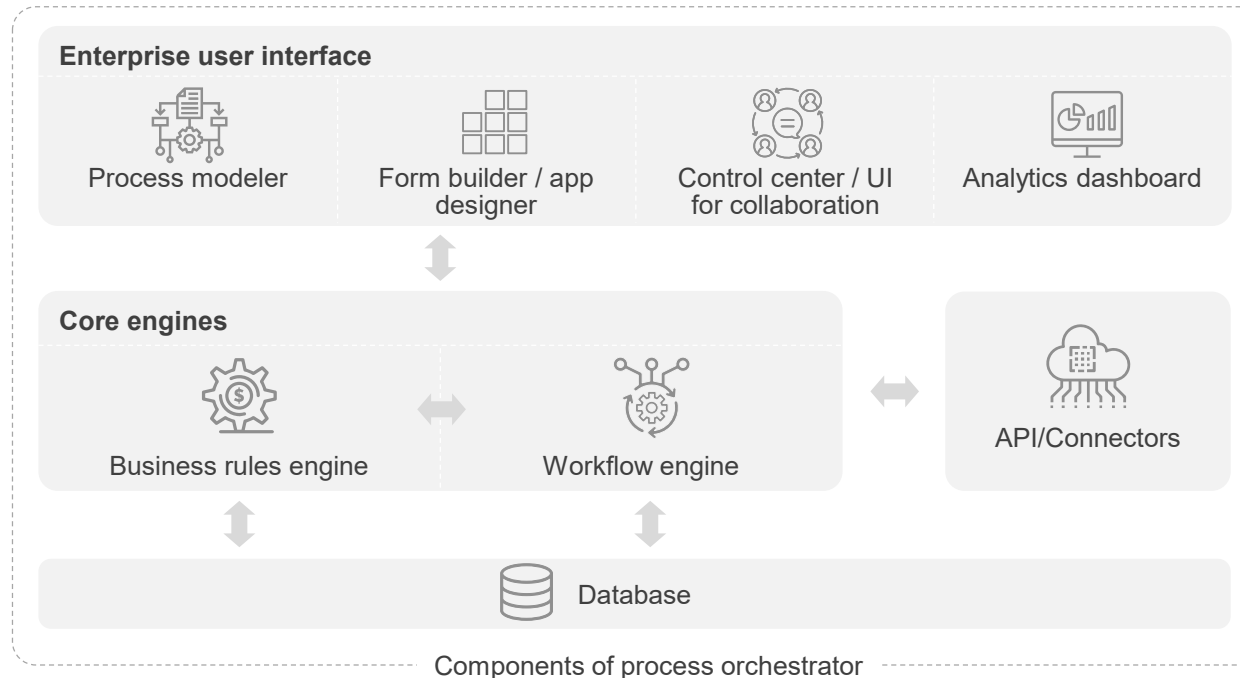


Enterprise process orchestration is a software that helps design, execute, and monitor end-to-end business processes. It includes key capabilities such as process modeling, business rules management, the ability to design user interfaces for capturing/presenting data, hybrid (human + digital) workforce 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.

## Key components of a process orchestration solution



Process discovery & analysis





## Overview and abbreviated summary of key messages

Enterprise process orchestration is a software that helps design, execute, and monitor end-to-end business processes. This report leverages Everest Group’s proprietary PEAK Matrix® to assess and evaluate process orchestration capabilities of independent software providers across two key dimensions, market impact and vision & capability. It also includes competitive landscape, Everest Group’s remarks on technology providers highlighting their key strengths & limitations, and insights into process orchestration technology trends.

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

### Everest Group Process Orchestration Products PEAK Matrix® 2023 – Update

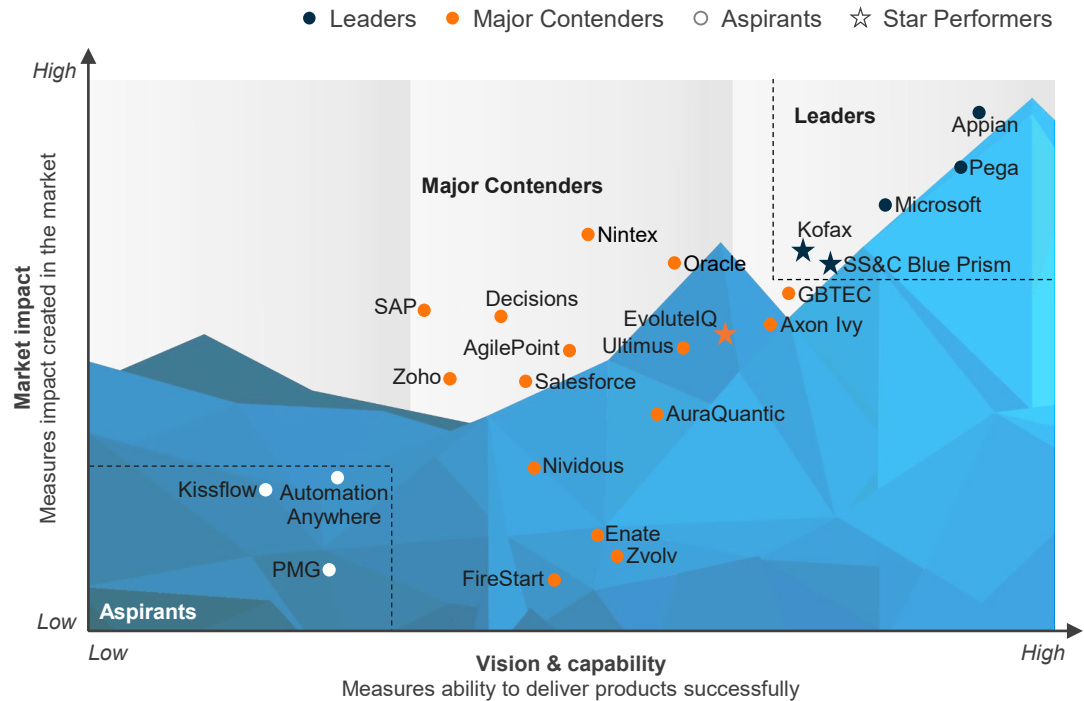
- Everest Group classifies process orchestration technology providers on the Everest Group Products PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants:
  - **Leaders:** Appian, Kofax, Microsoft, Pega, and SS&C Blue Prism
  - **Major Contenders:** AgilePoint, AuraQuantic, Axon Ivy, Decisions, Enate, EvoluteIQ, FireStart, GBTEC, Nintex, Nividous, Oracle, Salesforce, SAP, Ultimus, Zoho, and Zvolv
  - **Aspirants:** Automation Anywhere, Kissflow, and PMG
- Everest Group also identified three technology providers as the “2023 – Update Process orchestration Market Star Performers” – EvoluteIQ, Kofax, and SS&C Blue Prism. This was based on the year-over-year movement of different technology providers on the PEAK Matrix

### Insights on competitive landscape

- Appian, Microsoft, Nintex, and Pega are the top providers in terms of process orchestration software revenue; EvoluteIQ has achieved over 100% YoY growth
- Nintex, Pega, and Microsoft are the top providers by the number of clients; Enate and EvoluteIQ achieved high YoY growth in their client base
- Appian and SS&C Blue Prism are among the leading providers across all the key verticals
- Appian and Pega have a strong presence across all geographies. Nintex and SS&C Blue Prism are other dominant providers across major geographies
- Pega has the highest share of revenue from clients across large and midsize buyer segments; Microsoft has the largest share across small buyers and SMBs

# This study offers five distinct chapters providing a deep dive into key aspects of process orchestration technology provider market; below are three charts to illustrate the depth of the report

Process Orchestration Products PEAK Matrix® Assessment 2023 – Update<sup>1</sup>



<sup>1</sup> Assessment for Microsoft, Oracle, Pega, Salesforce, SAP, Ultimus, and Zoho excludes detailed provider inputs on this particular study and is based on Everest Group’s estimates that leverage Everest Group’s proprietary 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  
 Note: Star Performers are selected based on a relative comparison of providers’ performance on the market impact and vision & capability dimensions in the previous and latest PEAK Matrix® assessments. Providers with the highest year-over-year improvement are designated as Star Performers. The Star Performer title does not reflect the overall market leadership position, which is designated through Leaders, Major Contenders, or Aspirants  
 Source: Everest Group (2023)

Capability assessment

Illustrative example

Measure of capability: ○ Low ● High

Providers	Market impact				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
Provider 1	●	●	●	●	●	●	●	●	●	●
Provider 2	●	●	●	●	●	●	●	●	●	●
Provider 3	●	●	●	●	●	●	●	●	●	●
Provider 4	●	●	●	●	●	●	●	●	●	●
Provider 5	●	●	●	●	●	●	●	●	●	●
Provider 6	●	●	●	●	●	●	●	●	●	●
Provider 7	●	●	●	●	●	●	●	●	●	●
Provider 8	●	●	●	●	●	●	●	●	●	●
Provider 9	●	●	●	●	●	●	●	●	●	●

Everest Group’s remarks on providers

Illustrative example

Measure of capability: ○ Low ● High

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

Strengths

- Provider offers process orchestration capabilities for automating workflows and managing the hybrid workforce. Its platform is responsible for process design and has an interface targeted at citizen and professional developers
- Clients appreciate the ease of use of the platform, the product roadmap, and the product support. They find the products cost of ownership as reasonable. Clients also appreciate the ability to migrate running applications to new versions

Limitations

- The client portfolio of the provider is skewed toward small enterprise and SMB segments with revenue less than US\$1 billion. It has relatively lower experience of serving clients in mid-size and large enterprise segments
- The majority of provider’s clientele is from North America and Continental Europe. Its presence is other geographies such as the UK is relatively low while it lacks presence in LATAM

# Research calendar

## Service Optimization Technologies (SOT)

■ Published ■ Planned ■ Current release

Reports title	Release date
The Rise of Smart Digital Workers – Robotic Process Automation (RPA) State of the Market 2023	January 2023
Unlocking the Power of Hybrid Workforce – Process Orchestration State of the Market 2023	February 2023
Intelligent Automation – How Much is Your Dollar Worth?	March 2023
Intelligent Process Automation (IPA) PEAK Matrix® Assessment 2023	April 2023
Process Mining Products PEAK Matrix® Assessment 2023	June 2023
Continuous Process Improvement in Action – Process Mining State of the Market 2023	July 2023
Task Mining Products PEAK Matrix® Assessment 2023	August 2023
Task Mining – Technology Provider Compendium 2023	September 2023
Task Mining – State of the Market 2023	September 2023
Conversational AI Products PEAK Matrix® Assessment 2023	September 2023
Robotic Process Automation (RPA) – Technology Provider Landscape with PEAK Matrix® Assessment 2023	October 2023
<b>Process Orchestration Products PEAK Matrix® Assessment 2023 – Update</b>	<b>November 2023</b>
Robotic Process Automation (RPA) – Technology Provider Compendium 2023	Q4 2023
Process Orchestration Products – Provider Compendium 2023 – Update	Q4 2023
Process Orchestration State of the Market 2023 – Update	Q4 2023

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



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