Process Orchestration – Technology Provider Compendium 2023 – Update

December 2023: Complimentary Abstract / Table of Contents

Our research offerings

This report is included in the following research program(s):
Service Optimization Technologies, Process Orchestration

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- Application Services
- Artificial Intelligence (AI)
- Asset and Wealth Management
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- IT Talent Excellence
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- Market Vista™
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- Network Services and 5G
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- Outsourcing Excellence
- Payer and Provider Business Process
- Payer and Provider Information Technology
- Pricing Analytics as a Service
- Process Intelligence
- Process Orchestration
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- Retirement Technologies
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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

Santhosh Kumar, Practice Director

Samikshya Meher, Practice Director

Varun Jain, Senior Analyst

Jonty Padia, Senior Analyst

Sudeshna Chandra, Analyst

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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 objective of this report is to provide key stakeholders with a snapshot of the process orchestration offerings and capabilities of technology providers. In this report, we present detailed profiles of 24 leading process orchestration technology providers featured on the Process Orchestration Products PEAK Matrix® Assessment 2023 – Update. This report assists process orchestration 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' process orchestration offerings and capabilities:

- Company overview
- Recent deals and announcements
- Market adoption and client portfolio mix
- Product overview and partnerships

- Product functionalities and key enhancements
- Measure of capabilities across PEAK Matrix® dimensions
- Key strengths and limitations for technology providers

Scope of this report

Geography
Global

Providers
24 leading process orchestration technology providers

Products
Process orchestration

Everest Group®

Overview and abbreviated summary of key messages

This report features detailed profiles of 24 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.
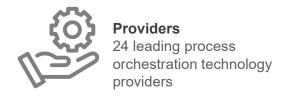
Some of the findings in this report, among others, are:

Process Orchestration Products PEAK Matrix® Assessment 2023 – Update

The 2023 process orchestration products PEAK Matrix positioning is as follows:

- **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

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
- Key strengths and limitations for technology providers

The process orchestration compendium report has 24 provider profiles; attached below are the charts to illustrate the depth of the report

Provider 1 profile (p
Overview

Company overview
Provider 1 Intelligent Automation (IA) platform h
the digital transformation of content-intensive w
and improve productivity. ABC empowers its cu
heightened competitiveness, sustainable growt

Headquarters: ABC

Key leaders
- ABC

Split of process orchestration revenue by buyer industry

Banking and capital ma 29%
Others 32%
Hi-tech and telecom 12%
CPG and retail (4%)
Insurance 6%
Government and public sector 7%
Manufacturing 10%

1 Buyer size is defined as large (>US$5 billion in rev
Note: Operational and product- / offering-related infor
Source: Everest Group (2023)

Provider 1 profile (p
Capabilities

Capability and offerings

Process design	Drag-and-drop inter document process
	Ability to track proc changes by busines
	Pre-defined templa and flowcharts
Business rules management	Configuration of bus and mathematical e
	Pre-built library/rep
	Availability of low-c to generate AI-/ML-
Low-code/no-code user interface development	Drag-and-drop inter forms for end-users
	Ability to create dyn
	Availability of gener application develop
	Application develop to enable collabora

Provider 1 profile (p
Capabilities

Capability and offerings

Hybrid workforce management	Availability of user i tasks/cases in real-
	Control center for c governance for digi
	Ability to automatic pending, ongoing, a
Monitoring and analytics	Monitor real-time pr against defined KPI
	Ability to create cus
Interoperability	Availability of pre-b enterprise applicati
	Availability of pre-b mining platforms
Security and compliance	Ability to configure policies
	Ability to maintain a to minimize complia
Complementary capabilities	Robotic Process Au
	Task mining

Provider 1 profile (p
Everest Group assessm

| Market i |
| Market adoption | Portfolio mix |

Strengths
- ABC vision is to help enterprises automat orchestration, RPA, IDP, task mining, and
- The ABC platform provides a drag-and-dr errors
- It offers the ability to define what-if scenar
- It supports different rule models encompa can also monitor the performance of busi
- The platform provides low-code/no-code displaying new fields based on the respon
- It comes with a step-by-step wizard to hel providers such as Google Cloud AI, IBM \
- ABC provides various hybrid workforce m Management Console also allows for cen
- It allows for monitoring of processes, case
- It has recently added OpenAI connector t
- The platform comes with built-in as well a
- It is available via a SaaS model and provi
- Clients have highlighted native IDP capab

Provider 1 profile (page 8 of 8)
Everest Group assessment – Leader and Star Performer

Measure of capability: ○ Low ● High

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
◔	◔	◔	◑	◑	◑	◕	◑	◔	●

Limitations
- ABC current focus is on serving clients in geographies such as North America, Continental Europe, and APAC, and it has a relatively smaller client base in emerging geographies such as MEA and LATAM
- The platform lacks a low-code/no-code design environment for generating AI-/ML-based predictive rules such as loan default prediction, fraud propensity, and churn prediction
- It currently does not provide AI-augmented portfolio analysis capabilities to help users rationalize their application landscape. This capability can provide insights into applications' usage and performance metrics, and help determine which applications should be kept, replaced, retired, or consolidated
- ABC does not offer AI-/ML-based models for predictive maintenance of the processes. Offering these models can help enterprises optimize their processes by identifying potential issues before they cause downtime or disruptions
- It does not offer pre-built connectors for business rules management (BRM) systems such as Actico and Red Hat. Introducing these connectors can provide more flexibility to enterprises to choose a BRM system as per their needs and configure complex business rules to their processes
- While ABC has built-in RPA, IDP, task mining, and API automation capabilities, it currently does not provide either built-in capabilities or partnerships with third-party process mining providers
- While the platform supports multi-tenant deployment and can be deployed in containerized form, it is not developed using loosely-coupled microservices architecture that can negatively impact the scalability of the platform and the roll-out speed of new features and upgrades
- Though ABC offers user-based, solution-based, and server-based pricing models, it currently lacks other prevalent models such as fixed-fee, process-based, and hybrid licensing models. Offering these models can enhance enterprises' flexibility in selecting a pricing model as per their specific requirements
- Clients have expressed better support for backward compatibility testing and more robust querying capabilities in the analytics module, especially when troubleshooting the issues

Research calendar
Service Optimization Technologies (SOT)

Reports title	Release date
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
Process Orchestration Products PEAK Matrix® Assessment 2023 – Update	November 2023
Robotic Process Automation (RPA) – Technology Provider Compendium 2023	December 2023
Process Orchestration – Technology Provider Compendium 2023 – Update	**December 2023**
Robotic Process Automation (RPA) – State of the Market 2023	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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Stay connected

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
+1-214-451-3000

Website
everestgrp.com

Social Media
𝕏 @EverestGroup
in @Everest Group
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