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The Forrester Wave™: Business Process Management Suites, Q3 2010

by Clay Richardson
for Business Process Professionals



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Pegasystems, Appian, IBM, and Software AG Lead The Pack

by **Clay Richardson**

with Connie Moore, Craig Le Clair, and Ralph Vitti

EXECUTIVE SUMMARY

Forrester evaluated 11 leading business process management (BPM) suite vendors against 148 criteria reflecting the requirements of business process professionals running large-scale BPM programs. We found that Pegasystems and Appian lead the pack with the best overall combination of modeling, design, and development features for business and technical roles driving process improvement. IBM, Software AG, and Savvion are also Leaders with competitive products that offer industry-leading development environments and improved tools for business stakeholders. Additionally, Lombardi and Metastorm fall into the Leader category, with impressive collaborative process design environments and Web 2.0 features. Oracle, Global 360, HandySoft, and Fujitsu are Strong Performers with compelling products that have their own unique strengths.

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NOTES & RESOURCES

Forrester conducted lab-based product evaluations in February and March 2010 and interviewed 48 vendor and user companies including Appian, Fujitsu, Global 360, HandySoft, IBM, Lombardi (IBM), Metastorm, Oracle, Pegasystems, Savvion (Progress Software), and Software AG.

Related Research Documents

["Dynamic Case Management — An Old Idea Catches New Fire"](#)
December 28, 2009

["Lean: The New Business Technology Imperative"](#)
September 29, 2009

["Forrester TechRadar™ For BP&A Pros: Business Process Management Suites, Q3 2009"](#)
August 13, 2009

BPM FINALLY DELIVERS ON ITS PROMISE

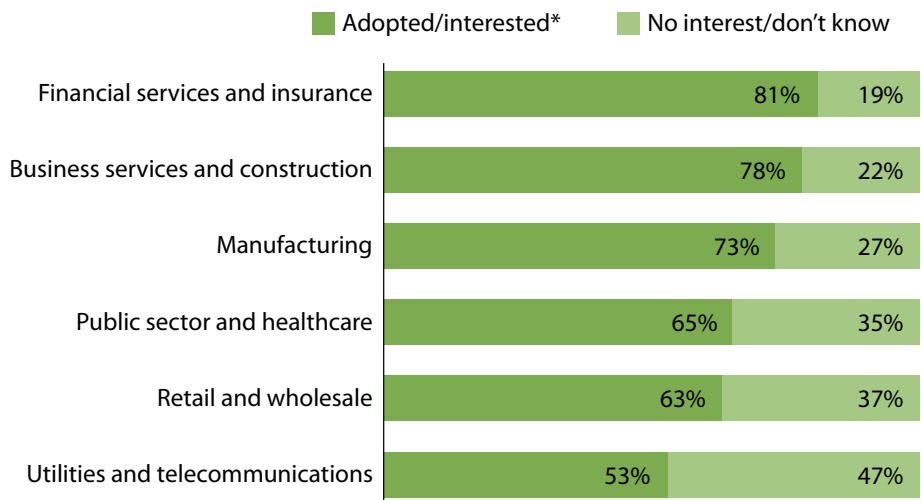
For the past decade, business process professionals held out hope that BPM suites would mature to truly empower all stakeholders — customers, partners, end users, line-of-business managers, and IT — to actively participate in driving process improvement across the enterprise. But like a mirage in a vast desert, BPM’s promise has always been just a little bit out of reach and over the horizon for business process professionals — until now. The desert of technically oriented and SOA-driven BPM suites has finally given way to a lush landscape of features and capabilities targeting process analysts, process architects, end users, business managers, and customers. And the landscape includes even richer tools for developers that accelerate delivery.

The Economic Downturn Served Up A Perfect Storm For BPM Suites

While most software categories reported slow growth during the so-called “Great Recession,” many BPM suite vendors posted healthy revenue gains and increased demand for their offerings. Some argue that BPM — the discipline and the technology — emerged as one of the heroes during the downturn, helping enterprises boost productivity and gain efficiency and greater control over key operational processes. In short, BPM and BPM suites proved their mettle during the storm.¹ Some of the hardest-hit sectors, including financial services and insurers, had the strongest appetites for BPM suites throughout the recession (see Figure 1).

Figure 1 BPM Adoption Is Strongest In The Hardest-Hit Sectors

“What are your firm’s plans to adopt the following types of platform and infrastructure software?”
 (Business process management software [BPM])



Base: 485 enterprise IT decision-makers

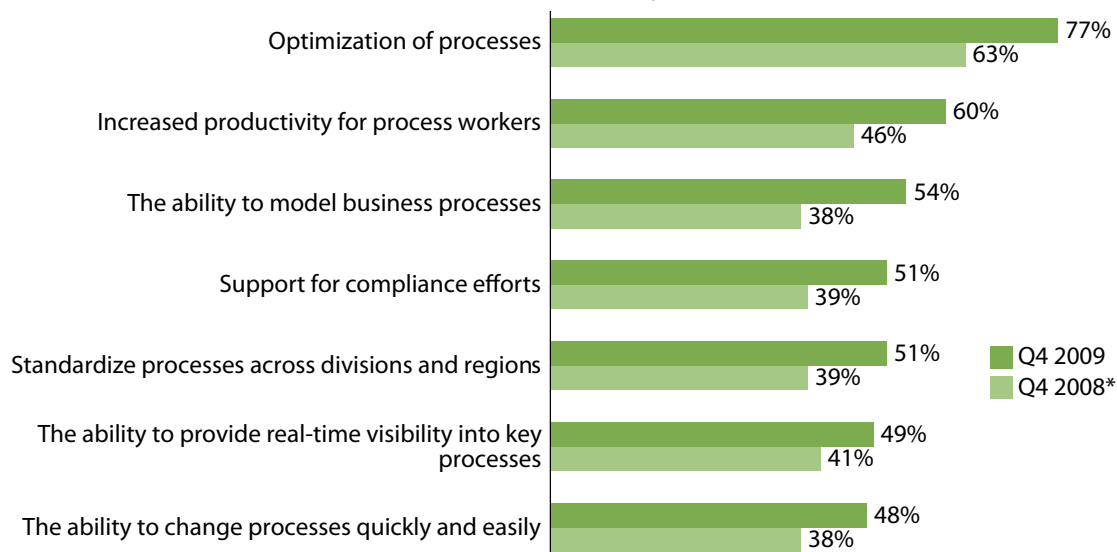
Source: Enterprise And SMB Software Survey, North America And Europe, Q4 2009

*BPM demand is comprised of respondents who are expanding/upgrading implementation; have implemented but are not expanding; are planning to implement in the next 12 months; are planning to implement in a year or more; or are interested with no plans.

Key economic themes from the recession will continue to drive demand for BPM over the next several years. Recent research shows that firms adopting BPM increasingly (see Figure 2):

Figure 2 Recession Drivers Fuel Demand For BPM Suites

“Which of the following have been major drivers for business process management software adoption?”
 (select all that apply)



Base: 227 enterprise and SMB IT decision-makers
 *Base: 467 enterprise and SMB IT decision-makers

Source: Enterprise And SMB Software Survey, North America And Europe, Q4 2009
 *Source: Enterprise And SMB Software Survey, North America And Europe, Q4 2008

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Source: Forrester Research, Inc.

- **Turn to BPM suites to meet compliance mandates.** With the change in US administrations, many companies — both US-based and global — are bracing for an onslaught of new regulatory mandates. And new healthcare legislation, passed in early 2010, will impose even tighter regulation on the healthcare industry — for both providers and payers. Increased control over processes and greater visibility into process exceptions will be key requirements for these industries to minimize the financial impact of new compliance mandates.²
- **Place greater emphasis on time-to-value and fit-to-purpose.** Teams exploring BPM are beginning to look at the entire life cycle — not just the development phase — to evaluate the overall value and impact of BPM.³ Teams are also placing greater emphasis on “fit-to-purpose” to better match BPM suite capabilities with their specific needs. This has led to even greater demand for vertically oriented solutions built on BPM suites — such as customer service process frameworks, healthcare underwriting process frameworks, and telecom customer provisioning frameworks, just to name a few.

- **View BPM as a flexible alternative to traditional development.** Looking beyond the recession, some leading organizations are adopting BPM suites as model-driven development environments that can quickly respond and adapt to change. These firms view BPM — and model-driven development — as a “hedge” or “insurance policy” against a constantly shifting business landscape. Processes can be quickly changed through visual composition and business rules, instead of hunting down lines of code. Forrester refers to these solutions as Dynamic Business Applications and the recession has shined an even brighter spotlight on the need for this capability.⁴

Market Consolidation Pushes BPM Suites To Next Level Of Maturity

The BPM suite market has gone through numerous rounds of consolidation, dating back to IBM’s 2002 acquisition of process modeling vendor Holosofx. Between 2004 and 2008, larger software vendors, such as Oracle, Software AG, and TIBCO Software snapped up smaller BPM suite vendors with hopes of merging their middleware integration suites with more business-savvy human-centric features provided by BPM specialists. Unfortunately, most of these deals left customers with poorly integrated hybrid environments that still emphasized technical development and middleware integration.

In the latest round of consolidation — sparked in 2009 with Software AG’s acquisition of business process analysis suite vendor IDS Scheer — larger stack vendors finally found the BPM sweet spot: Give the business what it needs without adding unnecessary complexity (see Figure 3). And now even midsized vendors, such as Pegasystems, are snapping up complementary technologies to help better support business stakeholders. This recent round of BPM suite consolidation points to:

- **Expanded BPM suite options for customers standardized on a particular stack vendor.** As stack vendors continue to gobble up BPM pure plays, the maze of BPM options available from a single vendor becomes even more confusing. However, the upside to having more options from a single vendor means you can enter BPM from whichever on-ramp makes the most sense for your organization and bolt on additional BPM capabilities as the need or situation arises.
- **Combination of process, rules, and events for more adaptive or dynamic business processes.** After acquiring Savvion, Progress Software launched a new offering that ties together Savvion’s BPM and business rules management capabilities with Progress’ complex event processing environment to support “self-optimizing” business processes that respond to real-time and historical events and metrics.⁵
- **Greater focus on customer-experience and customer-service processes.** Organizations are doubling-down on improving customer experience and customer service processes, and Pegasystems plans to capitalize on this trend with its acquisition of Chordiant, a Strong Performer in our most recent Forrester CRM Suites Wave.⁶ This acquisition also signals a shift to embedding more flexible business processes within traditional packaged applications.⁷

Figure 3 Consolidation Continues In The BPM Suite Market

Vendor	Acquiring vendor	Description
Lombardi Software	IBM	IBM acquired Lombardi in December 2009. The Lombardi offering is now part of the WebSphere software portfolio.
Savvion	Progress Software	Progress acquired Savvion in January 2010. The Savvion product will stand as its own product line in Progress' middleware portfolio.
Chordiant	Pegasystems	Pegasystems acquired Chordiant, a CRM suites vendor, in April 2010. Chordiant will sit alongside Pegasystems' CRM framework offering.
IDS Scheer	Software AG	Software AG announced its plans to acquire IDS Scheer, a business process analysis (BPA) suite vendor, in July 2009.

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Source: Forrester Research, Inc.

Next-Generation BPM Suites Empower Process Owners, Business Users, And Customers

Although process owners might sit in the room with process analysts and developers when defining process-driven solutions, in most cases BPM suites provide these process owners with limited capabilities to actively participate in process design or development. And, as for customers and end users, they're not even in the room to share their perspective on how best to improve business processes.

BPM suite vendors are beginning to focus on greater inclusion and collaboration across nontraditional roles for business process improvement, including process owners, business users, and customers. When evaluating BPM suites, business process professionals must understand how:

- **Social will change the way we get work — and processes — done.** While it may seem an odd combination, Forrester now sees more BPM teams leveraging social and Web 2.0 components — wikis, mashups, team workspaces — to improve collaboration and engagement throughout process discovery, design, and development.⁸ In the past, process professionals were left to scrape together homegrown Web 2.0 solutions to support their BPM initiatives. However, BPM suite vendors are beginning to pick up the slack by embedding social and Web 2.0 features that support collaborative process design, Facebook-style process feeds, and rating systems that allow business users and customers to provide feedback during process definition and execution.⁹
- **BPM-as-a-service will lower barriers to getting started with BPM suites.** Startup costs for implementing BPM suites can put these tools out of reach for some process owners that don't already have budget and executive support for launching their process initiative. To prove initial

value of BPM suites, smart process professionals now turn to BPM suites hosted in the cloud — often referred to as BPM-as-a-service. Offered on a subscription basis at \$30 to \$50 per user per month, BPM-as-a-service offerings allow teams to get started at a fraction of the cost of on-premises BPM suite offerings.

- **Business process and data quality are joined at the hip.** Through customer inquiries, interviews, and surveys, Forrester has identified data quality as a common pitfall plaguing BPM projects and initiatives. In most cases, process professionals and data management professionals have limited interactions across their respective projects. However, savvy process teams are now waking up to the fact that process and data are really just two sides of the same coin — low-quality data leads to low-quality processes. Some BPM suite vendors — such as IBM — are addressing this challenge by providing intuitive business glossaries as part of the process modeling and design environment.¹⁰
- **BPMN 2.0 will help improve communication across process teams.** Large organizations often amass a portfolio of multiple BPM suites and tools used by different teams. So what happens when these teams come together to discuss connecting their process assets to support end-to-end business processes? In most cases, they first must agree on process terminology and modeling notation. Business Process Modeling Notation (BPMN), a BPM standard published by the Object Management Group (OMG), aims to standardize process modeling notation across all BPM suite vendors.¹¹ OMG recently published the next revision of its BPMN specification, BPMN 2.0, which also tackles standardizing interoperability between BPM environments.

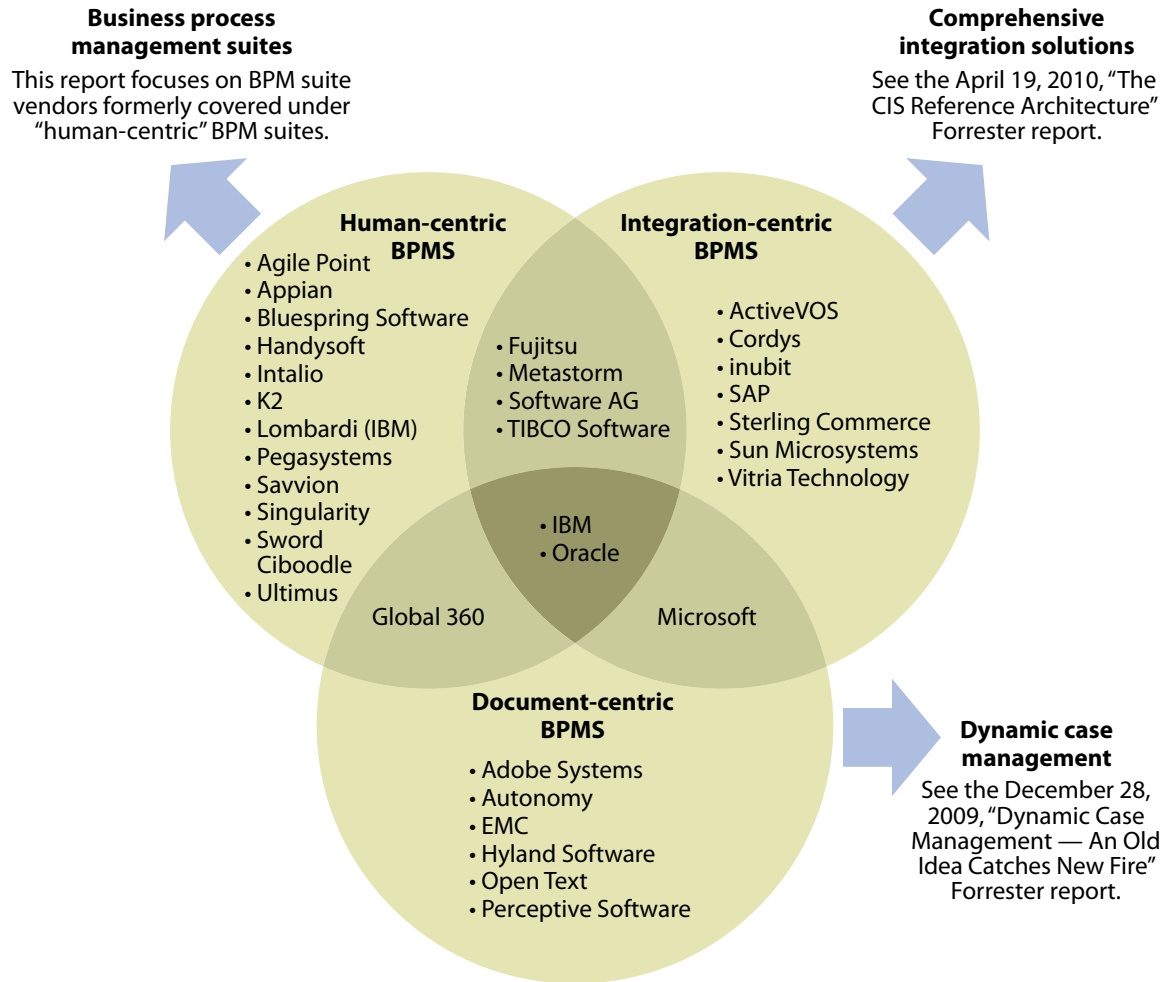
Which BPM Suite Is Right For Your BPM Initiative?

Traditionally, Forrester covers the BPM suite space through three different lenses: human-centric, integration-centric, and document-centric.¹² However, over the past few years, standalone integration-centric and document-centric offerings have matured into separate, standalone markets that include BPM plus much more (see Figure 4).

The document-centric BPM suite market — and vendors in this space — are beginning to focus more heavily on supporting dynamic case management patterns that leverage core BPM suite capabilities and also incorporate enterprise content management, records life-cycle management, sophisticated search, and content analytics capabilities.¹³ Moving forward, Forrester will cover the vendors and capabilities in this space as “dynamic case management.”

The integration-centric BPM suite market has evolved to provide complete suites for supporting heavy integration requirements. While some of these vendors provide good human-centric capabilities, most focus primarily on providing enterprise service bus, service registries, service repositories, and development environments targeting large-scale service-oriented architecture (SOA) initiatives. Moving forward, Forrester will cover the vendors and capabilities in this space as “comprehensive integration solutions.”¹⁴

Figure 4 Forrester's Evolving Coverage Of BPM Suites



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Source: Forrester Research, Inc.

Given the level of consolidation and maturity of the BPM suite market, most human-centric BPM suites vendors now provide sophisticated integration and document management capabilities to support large-scale business process improvement and business process transformation initiatives. While some customers might have more complicated integration requirements that require capabilities provided by comprehensive integration solutions, the Web service and integration capabilities included in today's human-centric BPM suites are sufficient to meet the integration requirements of the majority of BPM teams.

Likewise, most teams can leverage out-of-the-box content management features provided by BPM suites — including native content management repositories, adaptors, and beefed up support for enterprise content management standards. Moving forward, Forrester will cover the vendors and capabilities in the human-centric BPM suites category as “business process management suites.”

Selecting the right BPM tool should be a collaborative effort involving business and IT. To select the right BPM suite to meet your needs, Forrester recommends that business process pros:

- **Ask “Who’s in charge?”** To get a handle on which tools best meet the needs of your BPM initiative, first take a look at where the BPM program will sit —within IT or within the business (see Figure 5). If IT plans to drive process transformation efforts, you will want to select a vendor that has a strong development environment that promotes component reuse and rapid development. If the business plans to drive process transformation, you will want to select a vendor that has strong collaborative process design, prototyping, and shared development capabilities.
- **Audit internal process skill sets.** Implementing BPM suites requires contributions across many different roles, including process analysts, process architects, program managers, process developers, and technical architects — just to name a few. Take an honest look at the skill sets of resources leading your process improvement initiative to gauge which tool will best support your team’s efforts. Be sure to factor in ramp-up time and external resources into your total-cost-of-ownership numbers if there is a large gap between your team’s current skills and the skills needed to deploy a particular BPM suite.¹⁵
- **Evaluate your time-to-value requirements.** Some customers face hard and fast timelines when it comes to developing process-driven solutions. We often see this in highly regulated industries where new compliance mandates are coming down and organizations must quickly deploy BPM suites to minimize the risk of noncompliance. BPM initiatives that are under the gun to ramp up quickly should short-list BPM suite vendors that offer sophisticated vertical and horizontal frameworks that include well-defined object models, process models, and business logic for a specific solution. According to some customers, these industry frameworks helped accelerate time-to-value for their BPM programs by 30% to 40%.
- **Assess how often processes will need to change.** In some industries, processes are pretty standard and change only once — if that — every couple of years. In other industries, processes and rules might need to change several times within a week. Be sure to evaluate the frequency of change required for your processes in order to identify whether you need to short-list BPM suite vendors that bundle business rules and support for unstructured business processes. Vendors that include these capabilities will allow you to deploy solutions that can be quickly modified without requiring significant code changes or reworking business processes.

Figure 5 Who's In The BPM Driver's Seat

	Business-led process transformation	IT-led process transformation
Design collaboration (Web 2.0 and social)	●	○
Shared development model	◐	◐
Embedded project management	◐	●
ESB/SOA registry and repository	○	●
Business rules	◐	●

○ Not required ◐ Recommended ● Required

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Source: Forrester Research, Inc.

BUSINESS PROCESS MANAGEMENT SUITES EVALUATION OVERVIEW

To assess the state of the BPM suite market and see how well the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top BPM suite vendors suitable to meeting the needs of large-scale BPM suite initiatives.

Buyers Focus On Collaboration Across Modeling, Development, And Work Environments

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 148 criteria, which we grouped into three high-level buckets:

- **Current offering.** We looked at the breadth of each vendor's product offering, across 102 criteria, including process modeling and collaborative design, process development and composition, and collaborative work environment.
- **Strategy.** We looked at the strength of the each vendor's product strategy and vision and how it intends to be a leader in the BPM suite market.
- **Market presence.** To evaluate each vendor's penetration in the current BPM suite market, we evaluated 24 market-presence-related criteria, including revenue, revenue growth, installed base, support, and regional focus.

Evaluated Vendors Have Healthy Growth And Support Both Java And .NET Environments

Forrester included 11 vendors in our formal assessment: Appian, Fujitsu, Global 360, HandySoft, IBM, Lombardi — an IBM company, Metastorm, Oracle, Pegasystems, Savvion (Progress Software), and Software AG. TIBCO Software withdrew its iProcess BPM Suite from active selling during the summer of 2010, and the new BPM suite offering is ActiveMatrix BPM. ActiveMatrix BPM was

released after the May 1, 2010, cutoff date for this Forrester BPM Suites Wave publication. Each of the vendors evaluated has (see Figure 6):

Figure 6 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product(s) evaluated	Product version evaluated	Version release date
Appian	Appian 6	6.1	April 2010
	Appian Anywhere		April 2010
Fujitsu	Interstage Business Processor Manager	11	November 2009
Global 360	Process360	10.1	January 2010
HandySoft	BizFlow BPM Suite	11.5	February 2010
IBM	IBM WebSphere Dynamic Process Edition	7.0	December 2009
Lombardi (IBM)	Teamworks	7.0.1	December 2009
	Blueprint		February 2010
Metastorm	Metastorm BPM	9	December 2009
	Metastorm ProVision	6.2	February 2010
Oracle	Oracle BPM Suite	11g	April 2010
Pegasystems	SmartBPM	6.1	March 2010
Savvion (Progress Software)	Savvion BusinessManager	7.5.2	April 2010
Software AG	webMethods BPMS	8.0	December 2009
	ARISalign	1.0	March 2010
	ARIS Enterprise BPM	7.1	April 2008

Vendor selection criteria

The product meets Forrester's definition of a human-centric BPM product, and as such it represents one of the most complete collaborative process solutions available today. This means business-user-accessible support for process modeling, process-oriented development tools, a process execution engine that supports human work, a Web-based user experience for managing and tracking work tasks, and tools to support managers and administrators monitoring, changing, analyzing, and optimizing processes.

The vendor has been determined to be one of the leading providers of HC-BPMS solutions: It has significant market share in this sector or has gained leading-edge mindshare in a significant vertical industry.

The vendor provides support for both Java and .NET development and integration. The product provides well-documented out-of-the-box interfaces for customizing the solution using J2EE development, .NET development, and Web services.

The product version has been released and is generally available prior to May 1, 2010.

Source: Forrester Research, Inc.

- **At least \$30 million in revenue or strong market presence.** The vendors have disclosed either publicly or in confidence that their 2008 revenues were more than \$30 million or showed a strong market presence across multiple verticals and geographic regions.
- **Full support for all aspects of the business process life cycle.** This means business-user-accessible support for process modeling, process-oriented development tools, a process execution engine that supports human work, a work portal environment, and tools to support managers and administrators monitoring, changing, and optimizing processes.
- **Development and integration tools for Java and .NET environments.** To be included in this evaluation, vendors must provide support for both Java and .NET development and integration. The product provides well-documented out-of-the-box interfaces for customizing the solution using J2EE development, .NET development, and Web services.
- **A product generally available before May 1, 2010.** May 1 was the cutoff date for all products in the evaluation.

THE FORRESTER BPM SUITES WAVE REVEALS A SHAKEUP IN THE BPM SUITE LANDSCAPE

The evaluation uncovered a market in which (see Figure 7):

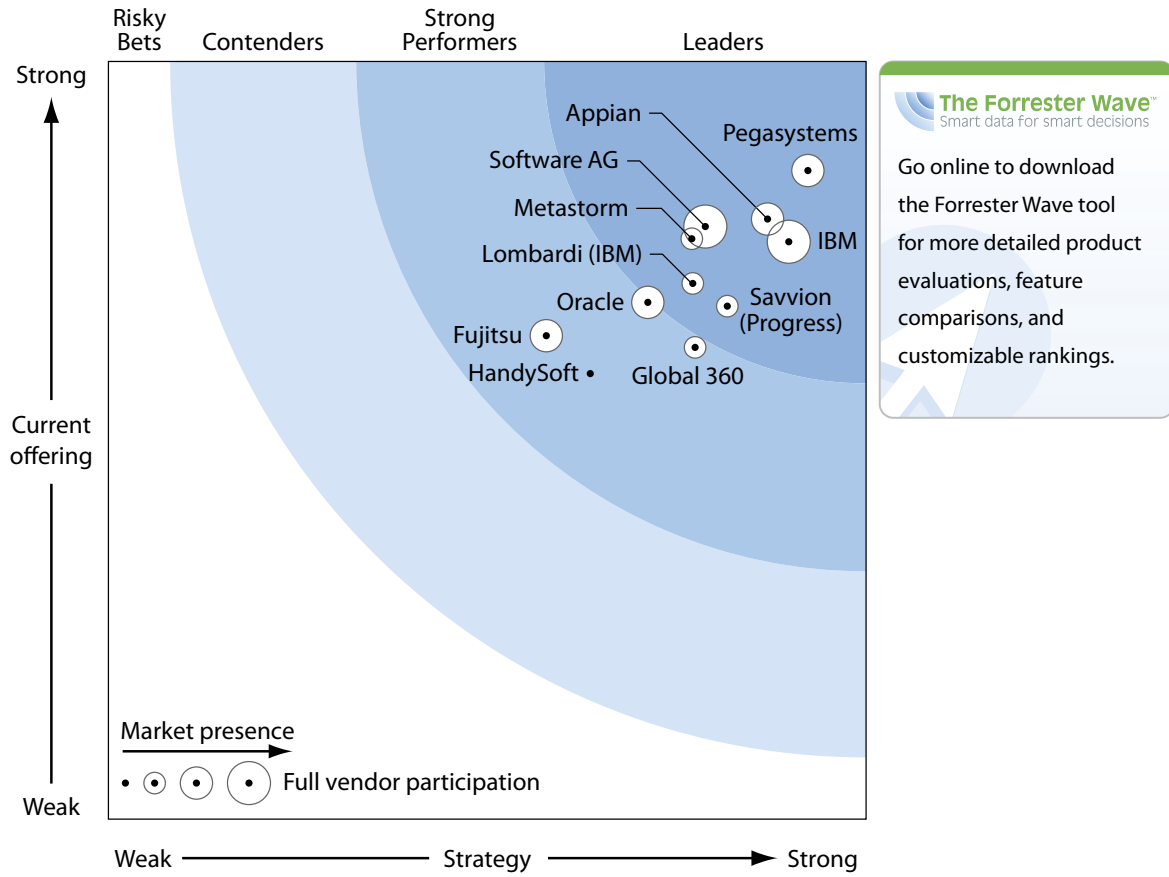
- **Pegasystems and Appian still lead with comprehensive offerings and good usability.** Both of these vendors received high marks for their best-in-class development environments and dynamic workspaces for business users. Beyond these capabilities, these vendors are placing big bets on divergent strategies for the BPM suite market. Pegasystems is betting big on its comprehensive frameworks that help process professionals accelerate time-to-value for delivering solutions to critical industry challenges. Meanwhile, Appian continues to bet big on the growing importance and value of delivering and supporting business processes in a software-as-a-service deployment model, using the same platform it deploys on-premises.
- **IBM and Software AG gain significant ground in the BPM suite space.** IBM and Software AG are BPM heavyweights that land in the Leader category for their strong integration features, strong process repositories, and excellent design collaboration capabilities. Although IBM is not a newcomer to the BPM suite space, the company makes its first appearance as a Leader in Forrester's BPM Suites Wave report (i.e., Forrester's Human-Centric BPM Suite Wave). Software AG also improved its standing in this evaluation by delivering an intuitive environment that is also highly scalable.
- **Metastorm, Savvion, and Lombardi also lead, striking a good balance between business and IT.** Lombardi and Savvion grew up and competed against each other as BPM pure plays. Now these vendors move on to compete as part of broader software portfolios. In the case of

Lombardi, the vendor was acquired by IBM in early 2010 and will augment IBM's WebSphere portfolio for customers seeking a quick-to-deploy BPM environment. Additionally, Savvion was acquired in early 2010 by Progress Software. Similar to Lombardi and Savvion, Metastorm started from humble BPM pure-play roots. However, unlike the other two vendors, Metastorm continues to stand alone — having done an excellent job of integrating its 2007 Proforma acquisition into its BPM software portfolio.

- **Oracle and Global 360 provide good products with their own unique strengths.** While each of these vendors provides good support across Java and .NET environments, they also have specific strengths and weaknesses that business process professionals supporting Java or .NET environments should consider. Global 360 provides excellent features for teams looking to implement large-scale BPM initiatives based on Microsoft SharePoint and Visio 2010. And Oracle provides one of the strongest environments for process development and integration using Java and Java-related components.
- **Fujitsu and HandySoft provide strong, specific appeal in their niches.** Both of these vendors deliver solid BPM suite environments with specialized capabilities targeting unique process scenarios or niche markets. HandySoft continues to be a major player in public sector circles with unique ad hoc process routing capabilities. Fujitsu continues to show strength in process development and flashes of innovation in other aspects of its product stack.

This evaluation of the BPM suites market is intended to be a starting point only. We encourage readers to view detailed product evaluations and adapt the criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

Figure 7 Forrester Wave™: Business Process Management Suites, Q3 2010



The Forrester Wave™
 Smart data for smart decisions

Go online to download the Forrester Wave tool for more detailed product evaluations, feature comparisons, and customizable rankings.

Source: Forrester Research, Inc.

Figure 7 Forrester Wave™: Business Process Management Suites, Q3 2010 (Cont.)

	Forrester's Weighting	Appian	Fujitsu	Global 360	HandySoft	IBM	Lombardi (IBM)	Metastorm	Oracle	Pegasystems	Savvion (Progress Software)	Software AG
CURRENT OFFERING	50%	3.96	3.19	3.12	2.94	3.81	3.54	3.83	3.41	4.28	3.38	3.91
Process modeling and collaborative design	35%	4.05	3.26	3.02	2.60	4.16	4.37	4.03	3.05	3.98	3.24	4.19
Process development and composition	25%	3.95	3.18	3.23	3.17	3.87	3.02	3.68	3.97	4.75	3.80	3.76
Collaborative work environment	35%	3.80	2.86	3.34	3.14	3.48	3.08	3.86	3.39	4.16	3.16	3.72
Product architecture	5%	4.50	5.00	1.80	2.90	3.40	3.70	3.05	3.25	5.00	3.90	4.00
STRATEGY	50%	4.35	2.89	3.88	3.18	4.49	3.85	3.85	3.56	4.62	4.09	3.93
Product strategy	40%	4.20	2.50	3.40	3.00	5.00	3.40	3.70	3.80	4.20	4.00	3.90
Corporate strategy	60%	4.45	3.15	4.20	3.30	4.15	4.15	3.95	3.40	4.90	4.15	3.95
Process expertise	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Product cost	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
MARKET PRESENCE	0%	3.10	3.78	2.80	2.00	4.64	2.93	2.95	3.51	3.74	2.65	4.52
Installed base	40%	2.75	3.55	3.20	2.15	4.60	2.75	3.20	2.80	3.75	1.90	4.25
Revenue	10%	1.00	5.00	1.00	0.00	5.00	1.00	1.00	5.00	3.00	3.00	5.00
Revenue growth	10%	5.00	0.00	5.00	0.00	3.00	3.00	0.00	3.00	5.00	0.00	5.00
Systems integrators	5%	3.00	3.00	1.00	3.00	5.00	5.00	5.00	3.00	3.00	5.00	3.00
Services	10%	3.60	4.60	3.00	2.20	5.00	2.60	2.80	3.40	4.20	4.00	5.00
Employees	15%	2.60	5.00	2.80	1.80	5.00	2.80	3.60	5.00	3.80	4.60	4.80
Technology partners	10%	5.00	5.00	1.50	5.00	5.00	5.00	5.00	3.50	3.00	2.50	4.50

All scores are based on a scale of 0 (weak) to 5 (strong).

Source: Forrester Research, Inc.

VENDOR PROFILES

Leaders Feature Business-Friendly Design Collaboration And Strong Development Models

- Pegasystems delivers a flexible environment that quickly adapts to changing business conditions.** Pegasystems' legacy as a packaged apps and business rules vendor is paying off handsomely for the Cambridge-based BPM suite vendor. Pega has a large and impressive portfolio of customers that swear by the platform because of its ability to easily change process and business rules without requiring code changes or redeployments. The vendor revamped its BPM suite environment to improve navigation and ease-of-use for BPM teams; however, the environment still requires a heavier ramp-up time than most BPM suites evaluated.

- **Appian provides a strong all-around offering with a strategic commitment to BPM-as-a-service.** Consistently a Leader in Forrester's Human-Centric BPM Suite Wave evaluations, Appian stands out for its completely Web-based environment — across process discovery, development, and execution. Appian's Web-based environment provides process analysts, process developers, and business users with rich and intuitive interfaces for building and managing business processes. But don't let Appian's business-friendly interface fool you — the company also packs a strong punch when it comes to integration and performance.
- **IBM becomes a Leader with an impressive offering that bridges the gap between app dev and process professionals.** IBM's WebSphere Process Server (WPS) weighed in as a Strong Performer in Forrester's 2007 Human-Centric BPM Wave evaluation. Since then IBM has made significant strides in its product strategy by shoring up some of its key human-centric capabilities, including providing a sophisticated portal environment for work management and monitoring and an integrated Web-based collaborative process design environment that can share and synchronize models with WPS' process development and integration environment. IBM's best-in-class product strategy and road map emphasize strong support for both business and technical teams for business process improvement. Relative to IBM's 2009 Lombardi acquisition, the company plans to position WebSphere Process Server as a "high scalability" BPM platform and Lombardi as a "rapid time-to-value" platform.¹⁶
- **Software AG matches strong process development with a comprehensive process repository.** In this iteration of our BPM suite evaluation, Software AG stood out for its comprehensive process repository, CentraSite, and improved process portal capabilities. In July 2009, Software AG acquired IDS Scheer, a leader in business process analysis suites. The IDS Scheer acquisition gives Software AG one of the deepest benches for process skills and capabilities in the market.
- **Metastorm enhances its offering with collaborative workspaces and Web-based modeling.** With its acquisition of Proforma, Metastorm was one of the first vendors to take advantage of the synergies between EA and BPM. Now that investment seems to be paying dividends by providing a compelling environment for BPM and EA teams to collaborate on strategy and delivery for business process improvement. The vendor has plugged several feature gaps we found in 2007 and now offers innovative collaborative workspaces and Web-based modeling features that make their BPM suite more accessible to business analysts and business users.
- **Savvion, now under Progress, repositioning itself to address "responsive process management."** In January 2010, Savvion was acquired by Progress Software. These two vendors complement each other very well, with Savvion providing best-of-class BPM suite capabilities and Progress delivering sophisticated complex event processing and analytics capabilities. Immediately following the announcement, Progress Software and Savvion went to work creating a new offering that supports predictive process scenarios and can also help optimize in-flight business processes. Progress points out that Savvion will continue to focus on building out its BPM suite while tapping into core features and functionality provided by its new siblings Actional and Apama.

- **Lombardi, IBM's latest BPM acquisition, couples industry-leading design collaboration with business-friendly process development.** Although acquired by IBM in late 2009, Lombardi continues to lead with one of the easiest to use and deploy platforms in the BPM suite space.¹⁷ Lombardi's Web-based process discovery environment, Blueprint, provides business users and process analysts with intuitive process discovery and design features. And the vendor's Teamworks platform provides rapid prototyping features that accelerate time-to-value for BPM suite implementations. IBM plans to position Lombardi — renamed WebSphere Lombardi Edition — as an agile alternative for customers looking for short ramp-up and deployment times for quick wins on their BPM initiatives.

Strong Performers Emphasize Technical Integration And Flexible Work Environments

- **Oracle delivers a strong development environment with new features for process analysts.** Over the past few years, Oracle has focused on unifying different BPM assets acquired from BEA Systems and Collaxa. Oracle BPM Suite 11g represents the culmination of bringing these different products together. While still heavy technically, the product introduces a Web-based modeling environment targeting process analysts and business analysts. Oracle has also made noticeable progress incorporating its WebCenter portal as a standard part of its BPM suite environment.
- **Global 360 provides comprehensive support for SharePoint process improvement initiatives.** Global 360's BPM suite provides best-in-class support for the Microsoft technology stack — including Microsoft SharePoint, Visio, Office, and SQL Server — and is benefiting from an expanding marketing relationship with Microsoft. In May 2010, the vendor introduced new process modeling and simulation capabilities that sit on top of Microsoft Visio 2010 and also introduced many enhancements that leverage Microsoft SharePoint 2010's improved repository capabilities. Global 360 also provides industry-leading role-based user applications that are highly customized for specific personas that participate in process execution.
- **HandySoft extends its dynamic BPM environment with ad hoc reporting and mashup capabilities.** Although HandySoft is one of the smallest vendors evaluated, the company packs a mean punch when it comes to helping process professionals with their BPM initiatives. Since our last BPM suite evaluation, the company stabilized its management team and has invested in rolling out several unique BPM components. Most notably, the vendor released new ad hoc reporting capabilities that allow business users to create their own sophisticated process intelligence reports. Additionally, the firm released new mashup capabilities that help accelerate time-to-value through rapid prototyping and quick deployment.
- **Fujitsu adds discovery capabilities to help teams uncover hidden process requirements.** With its extensive OEM and integration heritage, Fujitsu's Interstage BPM's current offering is perfectly suited for teams looking for a scalable and flexible BPM solution that can integrate into

heterogenous environments. Since our last BPM suite evaluation, Fujitsu has introduced new “automated process discovery” capabilities. These new features allow teams to analyze existing business applications and data to extract an initial process model. Teams can then refine this initial process model using sophisticated tools for path analysis and detecting process patterns.

SUPPLEMENTAL MATERIAL

Online Resource

The online version of Figure 7 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution:

- **Hands-on lab evaluations.** Vendors spent one day with a team of analysts who performed a hands-on evaluation of the product using a scenario-based testing methodology. We evaluated each product using the same scenario(s), creating a level playing field by evaluating every product on the same criteria.
- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.
- **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with three of each vendor’s current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don’t fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve.

ENDNOTES

- ¹ The current global economic crisis is putting increasing pressure on enterprise architects to find new — and more cost-effective — ways of meeting business needs. One software category in particular offers proven solutions to help increase operational efficiency while supporting higher levels of business innovation at the same time. See the March 17, 2009, “[Topic Overview: How BPM Can Help The Bottom Line In Difficult Times](#)” report.
- ² BPM and enterprise content management (ECM) suites alone are insufficient for dynamic case management, but the convergence of BPM, ECM, business analytics, and event processing will breathe new life into case management. See the December 28, 2009, “[Dynamic Case Management — An Old Idea Catches New Fire](#)” report.
- ³ Everyone wants to be lean these days, whether when stepping off a scale in the morning or reviewing the cost of running a successful business. But just how do you define “Lean” — especially in the context of business and technology? See the September 29, 2009, “[Lean: The New Business Technology Imperative](#)” report.
- ⁴ IT’s primary goal during the next five years should be to invent a new generation of enterprise software that adapts to the business and its work and evolve with it. Forrester calls this new generation Dynamic Business Applications, emphasizing close alignment with business processes and work (design for people) and adaptability to business change (build for change). See the September 24, 2007, “[The Dynamic Business Applications Imperative](#)” report.
- ⁵ “Business Process professionals are scratching their heads at today’s announcement by Progress Software to acquire Savvion.” Source: Clay Richardson, “Progress Software Acquires Savvion to Create Dynamic Business Platform for Process Professionals,” *Clay Richardson’s Blog*, January 11, 2010 (http://blogs.forrester.com/business_process/2010/01/progress-software-acquires-savvion-to-create-dynamic-business-platform-for-process-professionals.html).
- ⁶ Chordiant Software, Pegasystems, and Sword Ciboodle round out the Strong Performers group offering business process management (BPM) strengths to help orchestrate complex customer-facing processes, but they primarily target solving problems at large organizations. See the June 16, 2010, “[The Forrester Wave™: CRM Suites For Large Organizations, Q2 2010](#)” report.

- ⁷ Now Pega has thrown down the gauntlet to other CRM vendors by acquiring Chordiant, a CRM vendor that could provide key pieces that Pega lacks. Pega isn't abandoning the mainstream BPM market in favor of CRM — it's just strengthening its hand by more forcefully connecting business process and the delivery of great customer experiences. See the April 7, 2010, "[Pegasystems Acquires Building Blocks For Next-Generation CRM](#)" report.
- ⁸ Accordingly, Forrester has identified 15 key technology components and evaluated their current and future ecosystem phase, business value-add, and overall trajectory to support a more thorough planning of BPM program efforts. See the August 13, 2009, "[Forrester TechRadar™ For BP&A Pros: Business Process Management Suites, Q3 2009](#)" report.
- ⁹ Austin-based Lombardi Software's latest offering, Blueprint, positions the vendor to extend its leadership in human-centric business process management (BPM) and takes direct aim at Microsoft Word, PowerPoint, and Visio as the tools of choice for process analysts. See the February 6, 2009, "[Vendor Snapshot: Lombardi Blueprint Bridges Gap Between Process Discovery And Execution](#)" report.
- ¹⁰ If you are seeking to reduce complexity and move to optimization, link BPM and MDM activities to gain "one version of the truth" as a key foundation for business process transformation efforts. See the September 21, 2009, "[Warning: Don't Assume Your Business Processes Use Master Data](#)" report.
- ¹¹ Source: Steven A. White and Derek Miers, *BPMN Modeling and Reference Guide*, Future Strategies, August 2008.
- ¹² Given the profound differences among products and vendors, we segment BPMS tools into three categories: human-, integration-, and document-centric. While some convergence has occurred and more is anticipated, differences between products in the three categories are real. See the September 4, 2009, "[The Importance Of Matching BPM Tools To The Process](#)" report.
- ¹³ These forces will push document-centric BPM suites toward packaged case management offerings, and this new category of software will emerge as a distinct market by 2013. See the December 28, 2009, "[Dynamic Case Management — An Old Idea Catches New Fire](#)" report.
- ¹⁴ Comprehensive integration solutions (CISes) are suites of tools that provide the broadest array of internal and external integration capabilities available in the market today. As such, they are uniquely qualified to support complex business activities that require a solution that simultaneously addresses application, business-to-business (B2B), and process integration needs. See the April 19, 2010, "[The CIS Reference Architecture Model](#)" report.
- ¹⁵ Today's business process transformation mantle dictates the need for six roles that span the gap between traditional IT and business functions: stakeholders, change agents, gurus, prodigies, wannabes, and operators. See the March 5, 2010, "[Business Process Pros Hold The Key To 21st Century Business Transformation](#)" report.
- ¹⁶ In a move that completely reshuffles the deck in the business process management (BPM) software market, IBM recently acquired Lombardi Software, a leader in human-centric BPM suites. Estimated at between \$150 million and \$180 million, the deal plugs critical holes in IBM's BPM strategy and helps Big Blue

establish a solid foothold in the market for human-centric BPM solutions. See the March 22, 2010, “[IBM Doubles Down On BPM With Lombardi Acquisition](#)” report.

- ¹⁷ Existing IBM customers will welcome Lombardi’s simplified business-oriented environment, while existing Lombardi customers will benefit from the robust process integration platform provided by WebSphere Process Server (WPS). However, current IBM and Lombardi BPM customers should buckle up for a bumpy ride, as IBM figures out the best way to integrate the newest addition to its already crowded BPM stack. See the March 22, 2010, “[IBM Doubles Down On BPM With Lombardi Acquisition](#)” report.

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