



The Forrester Wave™: BPM Suites, Q1 2013

by Clay Richardson and Derek Miers, March 11, 2013

KEY TAKEAWAYS

BPM Suites Take Center Stage In The Age Of Digital Disruption

BPM has played a substantial role in driving back-office efficiency, process automation, and worker productivity. Now in 2013, BPM is positioned to star in its most challenging role to date: helping the enterprise embrace disruptive forces of change -- technological, competitive, and regulatory -- that are often unknown and unforeseen.

Suites Evolve To Cover Full Range Of Business Process Scenarios

Market consolidation has driven broader adoption and visibility for BPM, but practitioners still struggle to decide if they need multiple BPM tools to cover different business process use cases and scenarios: building end-to-end processes, enabling customer experience initiatives, and engaging customers and employees via mobile and social channels.

BPM Suites Still Struggle To Achieve Their Enterprise Potential

Best practice dictates that to get a good return on your BPM investment means scaling from project to program. To remove the friction associated with the shift from project to program, next-generation BPM suites will empower business architects to execute on business strategy and embed methodology best practices.

The Forrester Wave™: BPM Suites, Q1 2013

How The Top 10 Vendors Stack Up For Next-Generation BPM Suites

by [Clay Richardson](#) and [Derek Miers](#)
with [Alex Cullen](#) and Julian Keenan

WHY READ THIS REPORT

In Forrester's 59-criteria evaluation of business process management (BPM) suite vendors, we identified the 10 most significant software providers in the category — Appian, Bizagi, Cordys, HandySoft, IBM, OpenText, Oracle, Pegasystems, Software AG, and Tibco Software — and researched, analyzed, and scored them. This report details our findings about how well each vendor fulfills our criteria and where they stand in relation to each other to help enterprise architects select the right solution to support launching and scaling enterprisewide BPM programs and initiatives.

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Forrester conducted product demos, strategy sessions, and customer reference interviews for nine vendors in the BPM suites market: Appian, Bizagi, Cordys, HandySoft, IBM, OpenText, Pegasystems, Software AG, and Tibco Software.

Related Research Documents

[Prepare For 2013's Shifting BPM Landscape](#)
January 23, 2013

[Accelerate Business Change With The Right BPM Tools And Technologies](#)
December 13, 2012

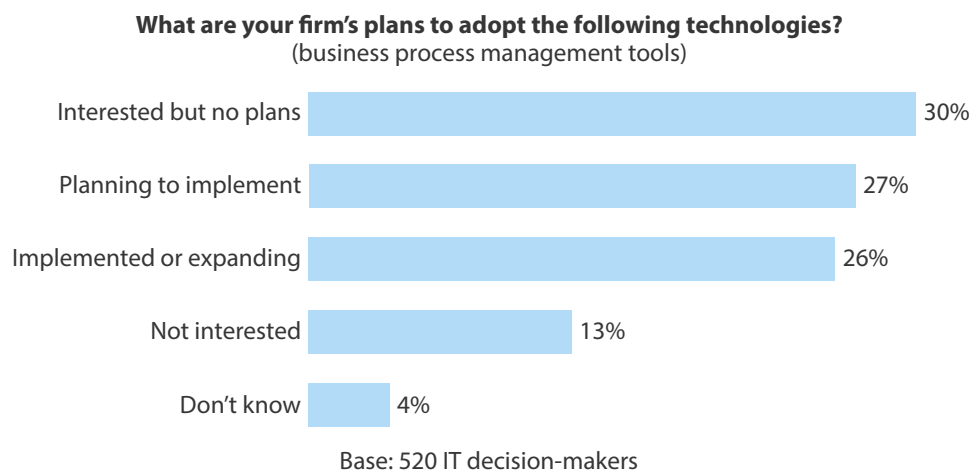
[The ROI Of BPM Suites](#)
August 22, 2011



BPM SUITES TAKE CENTER STAGE IN THE AGE OF DIGITAL DISRUPTION

Like a seasoned actor, BPM has starred in many different roles across the enterprise over the past decade. In its inaugural role, BPM teamed up with document imaging and workflow to automate and streamline paper-intensive business process.¹ Since then, BPM has evolved to tackle more substantial business challenges, with an emphasis on driving back-office efficiency, process automation, and worker productivity. In 2013, BPM is positioned to star in its most challenging role to date: helping the enterprise embrace and adapt to disruptive forces of change — technological, competitive, and regulatory — that are often unknown and unforeseen (see Figure 1).

Figure 1 Enterprises Continue To Ramp Investment In Business Process Management Tools



Source: Forrsights Budgets And Priorities Tracker Survey, Q4 2012

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Source: Forrester Research, Inc.

Suites Evolve To Support Full Range Of Business Process Use Cases

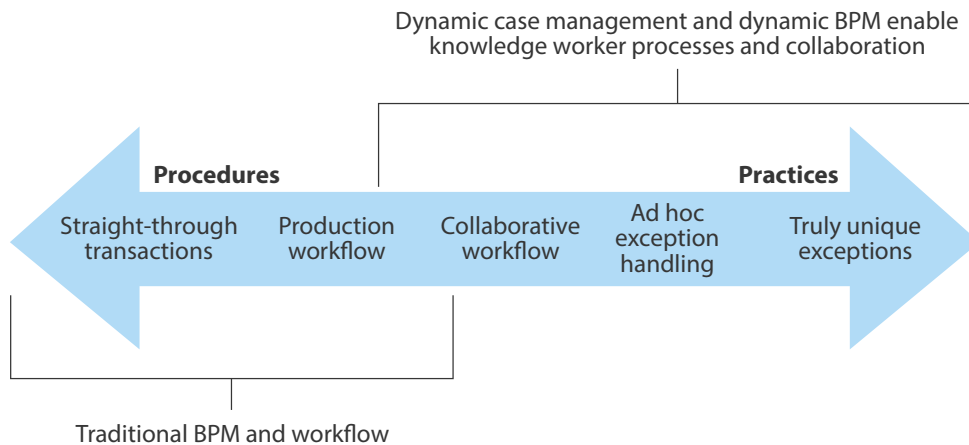
Over the past five years, the BPM suites space has gone through multiple waves of consolidation. The most recent consolidation came in the form of larger BPM players swallowing up smaller players to gain a greater share of the BPM market. Although market consolidation helped drive broader adoption and awareness for BPM, enterprise architects still struggle whether they need multiple BPM tools to cover different business process use cases and scenarios, as they seek to:

- **Build end-to-end processes that span DCM, BPM, and straight-through processing.** Historically, Forrester has tracked BPM software across three different market segments: document-centric BPM suites, human-centric-BPM suites, and integration-centric BPM suites.² However, through market consolidation these three segments are merging into a single BPM suite offering that can cover three different work patterns: dynamic case management (DCM), human workflow, and straight-through processing.³ These unified BPM suites now provide

single design and development environments for building and deploying end-to-end business processes that incorporate multiple process patterns and use cases (see Figure 2).

- **Design customer experiences from the outside in.** No longer relegated to the back-office, BPM today plays a critical role in driving customer experience initiatives.⁴ These initiatives range from companies looking to overhaul customer service processes to companies seeking to deliver more compelling experiences that incorporate big data analytics and real-time guidance. Leading BPM suite vendors are beginning to blur the line between customer experience design and business process design. In some cases, vendors allow enterprise architects and business architects to take an “experience-first” approach to business process transformation.⁵ Instead of focusing on the process model first, these solutions allow teams to define process change based on the customer experience.
- **Engage customers and employees through mobile and social channels.** The way we get work done has changed significantly over the past few years. Increasingly, workers and customers expect to engage with companies via mobile applications and social channels.⁶ BPM suites have embraced these digital disruptors, with nearly all vendors now offering some level of support for getting work done while on the go. Additionally, BPM suites now provide social work interfaces that allow customers and employees to easily “follow” a given process and quickly identify experts for a given business process or task.

Figure 2 BPM Suites Evolve To Support Full Spectrum Of Process Use Cases



But BPM Suites Often Struggle To Play A Blockbuster Role Across The Enterprise

Let's face it, investing in BPM — both the practice and the technology — does not come cheap. Average startup costs for initial software licenses run between \$250,000 to \$300,000, with additional upfront investment in training and infrastructure.⁷ The assumption has always been that the only way to get a good return on your investment in BPM is to scale the initiative from project to program. The mantra for BPM has always been “start small, think big, move fast!” However, most teams hit a brick wall when it comes to the “moving fast” part of the equation. While they might be able to achieve quick wins with the first two or three departmental projects, the shift to enterprise is often hampered by the technology being typecast as a tactical tool, unable to shift into a more strategic role.

Some enterprise architects and business architects argue that BPM suite software has a limited role to play in helping teams evolve from project to program. However, in order to remove the friction associated with moving from project to program, the next generation of BPM suites will (see Figure 3):

- **Empower business architects to design and execute on process strategy.** Business architects are playing a broader role in driving business change initiatives. In many cases, these architects focus on defining the strategy for transforming end-to-end business processes. Historically, BPM tools offered very little to help these strategists scope and manage large-scale change projects. This disconnect between strategy and execution keeps BPM suites isolated to the CIO's office, without a way to have a greater impact on enterprise strategy.
- **Remove upfront barriers to rapid development with cloud models.** Initial deployment for BPM suites is often hampered by the need to stand up and configure new infrastructure for installing the software. Many teams now remove this friction point for BPM by deploying initial projects using the BPM suite vendor's cloud environment (see Figure 4). This allows teams to realize immediate impact for BPM and also demonstrates to business stakeholders that they can see rapid return on investment without technology becoming a hurdle.
- **Embed program and method support to provide the right guiderails.** One of the most common complaints we hear from BPM teams is how difficult it can be to adopt best practices for scaling BPM from siloed projects into high-impact, enterprisewide change programs. Leading BPM suite vendors are now beginning to embed project and program best practices directly into their software platforms, instead of leaving this knowledge buried in 5,000-page red books and online knowledge bases. Without these embedded guiderails, BPM teams usually end up relying heavily on the vendor — or the vendor's implementation partners — for long-term support for implementing the product correctly.⁸

Figure 3 Common Friction Points For Moving BPM From Project To Program

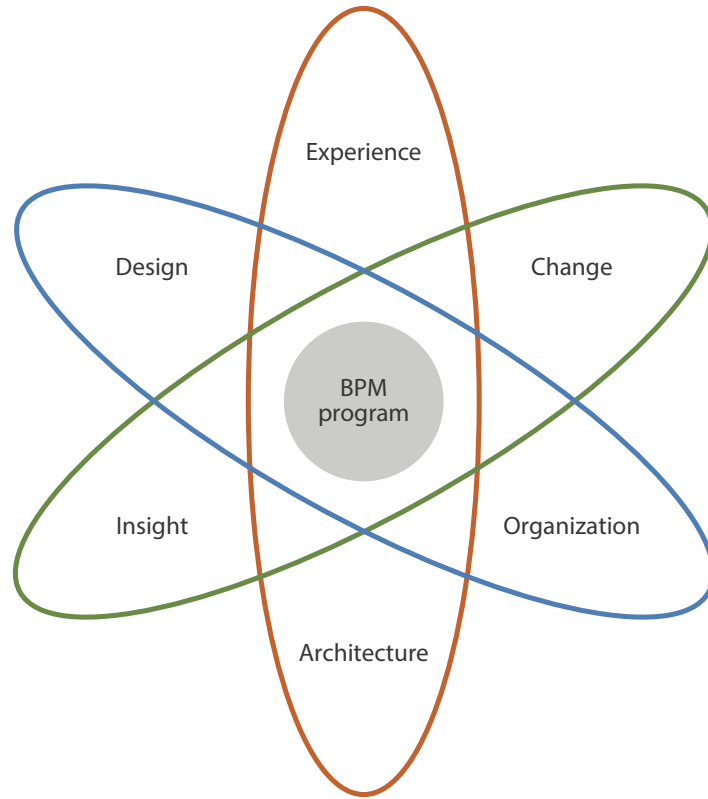
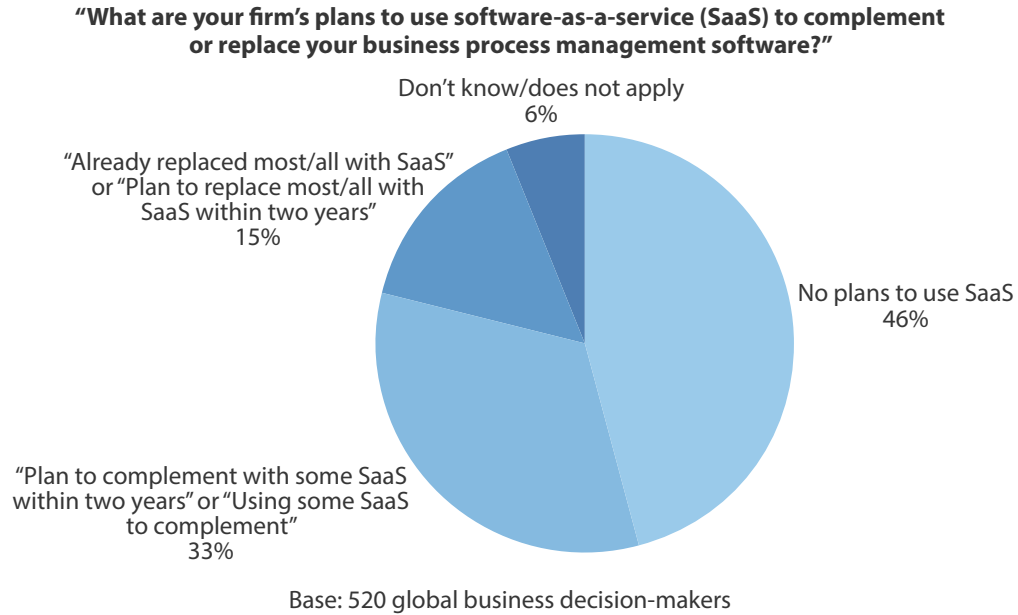


Figure 4 Many BPM Programs Either Plan To Use Software-As-A-Service Or Already Do So



Source: Forrsights Business Decision-Makers Survey, Q4 2012

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Source: Forrester Research, Inc.

BPM SUITES EVALUATION OVERVIEW

Even with market consolidation, the BPM suite space is still a crowded stage. At last count, Forrester identified 52 different vendors competing in the broader BPM market, covering BPM suites, DCM, and integration suites (see Figure 5). With such a wide variety of vendors to choose from, companies evaluating BPM suites should spend time assessing their unique business process needs to develop the right shortlist of vendors to consider.

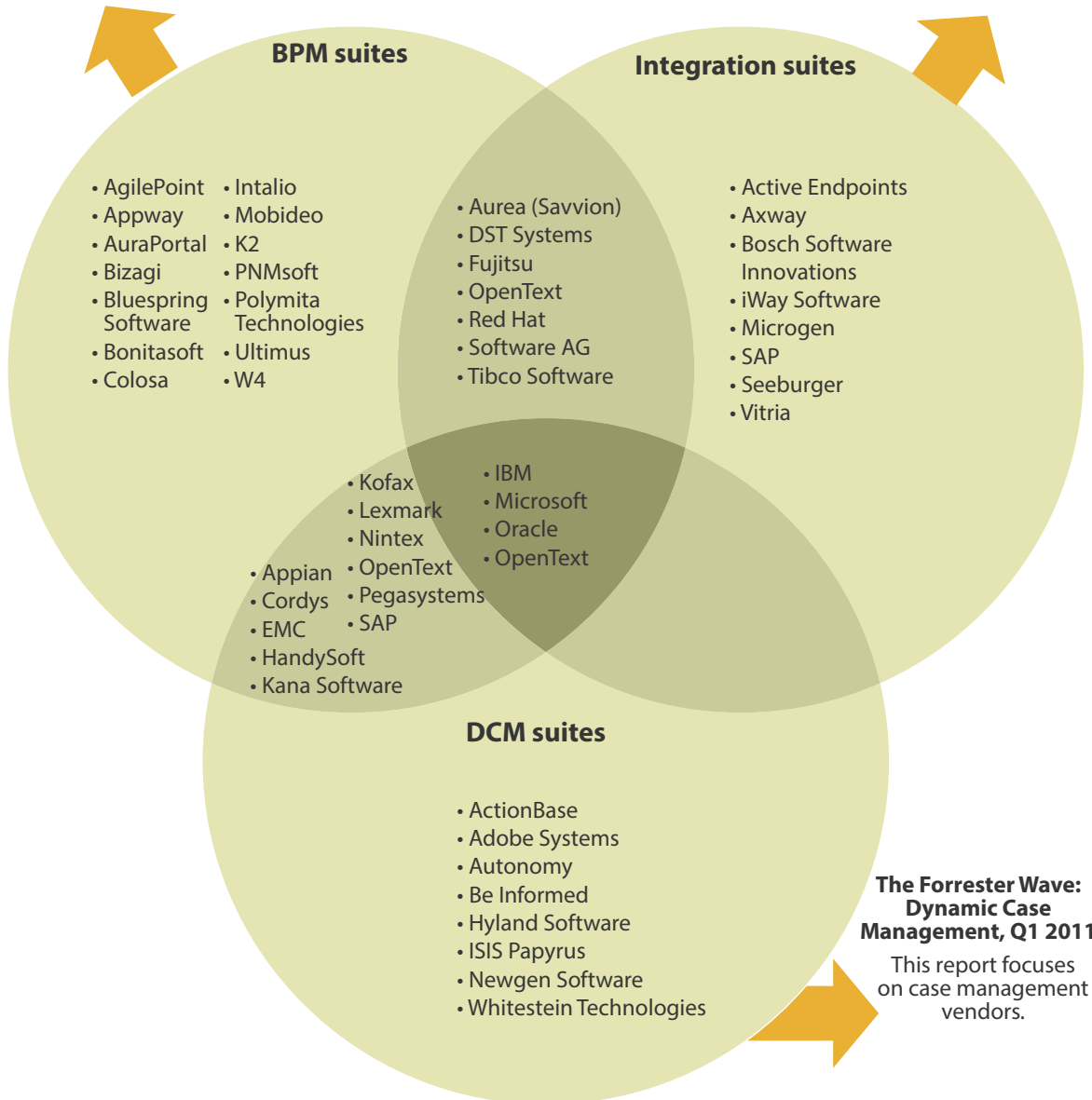
Figure 5 Business Process Management Market Continues To Be A Crowded Stage

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

This report focuses on BPM suite vendors formerly covered under "human-centric" BPM suites.

**The Forrester Wave:
 Comprehensive Integration
 Solutions, Q4 2010**

This report focuses on integration vendors formerly covered under "integration-centric" BPM suites.



Source: January 23, 2013, "Prepare For 2013's Shifting BPM Landscape" Forrester report

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Source: Forrester Research, Inc.

Evaluation Criteria Focus On Broad Support For Scaling BPM Programs

After examining past research, hundreds of client inquiries, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 59 criteria, which we grouped into three high-level buckets:

- **Current offering.** In this category, we looked at product architecture, work management, authoring environment, supported work patterns (dynamic case management, human workflow, and straight-through processing), and embedded support for business architecture and program management.
- **Strategy.** In this category, we took a close look at each vendor's product strategy and road map, approach to program enablement, and overall corporate strategy. In particular, we focused on evaluating which vendors had compelling road maps that focused on removing complexity from implementing BPM, in addition to investing in improving the overall design and usability of the product.
- **Market presence.** In this category, we looked at the install base of customers using the vendor's BPM suite product, how much revenue is attributed to the vendor's BPM suite offering, the level of research and development (R&D) resources dedicated to the product, and the size of the partner ecosystem capable of implementing the product.

Forrester Selected Vendors According To Product Scope And Global Success

To help you create a solid shortlist of candidates, Forrester evaluated the strengths and weaknesses of leading BPM suite vendors. We then identified the top 10 vendors for deeper evaluation based on their support for the full scope of business process use cases and patterns, including support for dynamic case management, human workflow, and straight-through processing (see Figure 6). Additionally, we selected vendors based on their product's support for scaling BPM initiatives from project to program. We included nine vendors and their products in our detailed evaluation: Appian, Bizagi, Cordys, HandySoft, IBM, OpenText, Pegasystems, Software AG, and Tibco Software.

Although Oracle chose not to participate in this Forrester Wave evaluation, we evaluated its BPM suite offering based on our knowledge from past analysis and publicly available information to provide a complete picture of the competitive landscape. Each of the vendors selected broadly met all of the following qualification criteria:

- **Support for DCM, human workflow, and straight-through processing.** All of the vendors in this evaluation can support the three most common use cases for BPM: dynamic case management, human workflow, and straight-through processing. However, this does not mean that all vendors must or can offer exactly the same approach or the same functional depth for each use case.

- **Embedded support for scaling initiatives from project to program.** BPM teams increasingly rely on vendors for knowledge transfer to quickly ramp up on skills and best practices for building sustainable BPM programs. To help accelerate program enablement, BPM suites must provide the right guiderails to help teams design and execute their program. In short, BPM suites are beginning to evolve to support the broader BPM program and not just the development and analysis aspects of BPM.
- **Global delivery track record and capability.** Vendors had to deliver BPM projects for clients in at least four of the seven regions of the world in 2011: North America, South America, Central America, Europe, Africa, the Middle East, and Asia Pacific. A significant number of client installations had to be included in both North America and Europe. This qualification criterion ensures that vendors participated in this evaluation with both a competitive current offering and the ability to deliver across the globe.
- **Mindshare within Forrester's client base.** Included vendors are frequently mentioned in Forrester client inquiries and other forms of client interaction.

Figure 6 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product evaluated	Product version evaluated	Version release date
Appian	Appian 7	7	November 2012
Bizagi	Bizagi Go	10	December 2012
Cordys	Cordys Business Operations Platform	4.2	October 2012
Handysoft	BizFlow Plus	12	June 2012
IBM	IBM Business Process Manager	8	December 2012
OpenText	MBPM	9.2	August 2012
Oracle	Oracle Business Process Management Suite 11g	11.1.1.6	February 2012
Pegasystems	Pega BPM	6.3	December 2012
Software AG	webMethods BPM Suite, ARIS Enterprise, ARISalign	8.2, 7.2, 1.0	April 2011, March 2012, March 2010
Tibco Software	ActiveMatrix BPM	2	November 2012

Vendor selection criteria

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Mindshare within Forrester's client base. Included vendors are frequently mentioned in Forrester client inquiries and other forms of client interaction.

Source: Forrester Research, Inc.

EVALUATION ANALYSIS

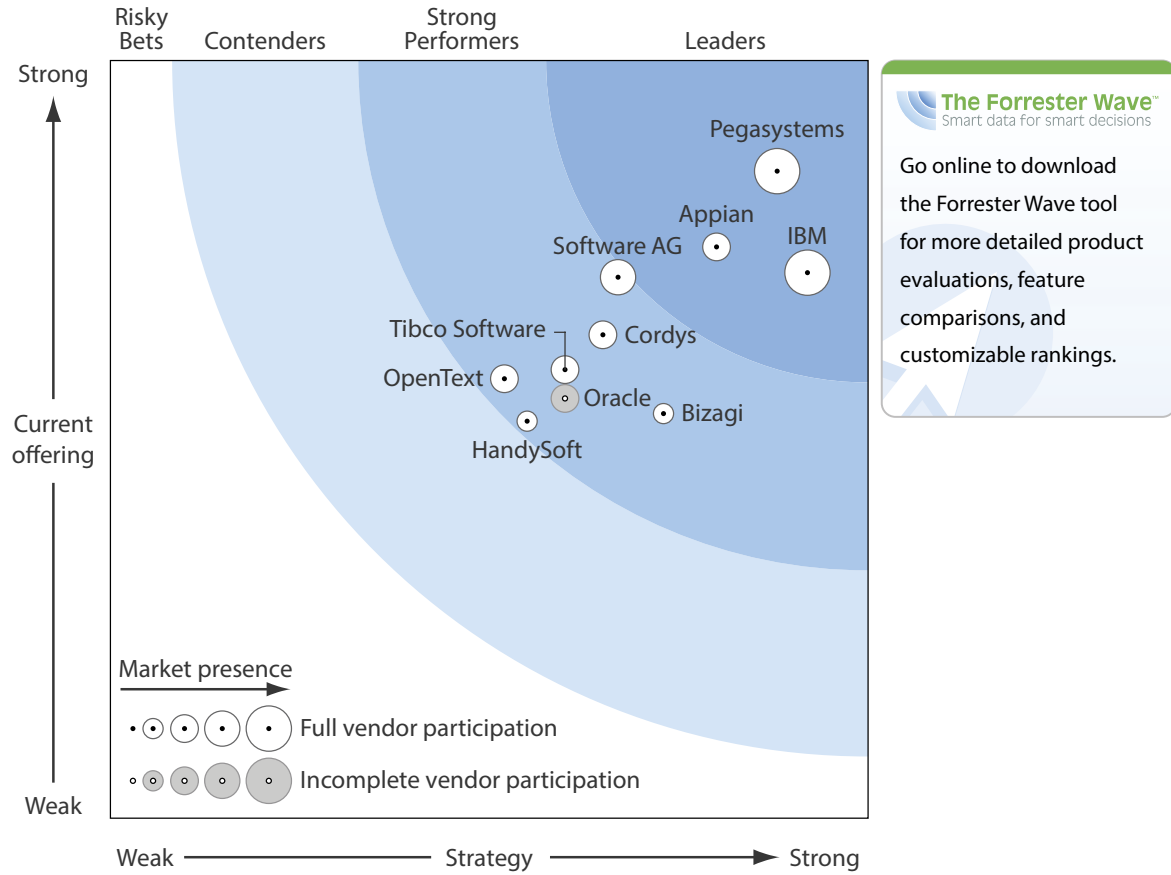
The evaluation uncovered a market in which (see Figure 7):

- **Appian, IBM, and Pegasystems lead the pack.** “Look and feel” might seem trivial factors when selecting a BPM suite. However, providing a consistent user interface across different suite components — which each of these leading vendors do — goes a long way toward helping teams extend the reach and impact of BPM suites across the enterprise. Additionally, each of these vendors has done an impressive job embedding BPM methods and program support features into their products. Pegasystems and Appian both provide native support for modeling and executing dynamic case management, human workflow, and straight-through-processing scenarios.
- **Bizagi, Cordys, HandySoft, OpenText, Oracle, Software AG, and Tibco are competitive.** The Strong Performer category has a wide range of vendors. Software AG and OpenText are larger vendors with BPM suite platforms that bridge the gap between strategy and execution. Cordys and Bizagi offer innovative approaches to incorporating and synchronizing master data between business processes and legacy source systems.

Oracle and Tibco Software provide best-in-class functionality for integration business processes with back-end systems and service-oriented architectures. HandySoft’s BPM suite allows teams to get started with BPM at an attractive price point while being able to scale to support sophisticated use cases, including DCM, human workflow, and straight-through-processing.

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

Figure 7 Forrester Wave™: BPM Suites, Q1 2013



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™: BPM Suites, Q1 2013 (Cont.)

	Forrester's Weighting	Appian	Bizagi	Cordys	Handysoft	IBM	OpenText	Pegasystems	Software AG	Tibco Software
CURRENT OFFERING	50%	3.77	2.67	3.19	2.62	3.60	2.90	4.27	3.57	2.96
Architecture	30%	3.94	2.82	3.32	2.85	3.59	2.80	4.38	3.91	3.30
Work management	20%	3.71	2.41	2.89	1.89	3.61	2.72	4.50	2.43	3.34
Authoring environment	20%	3.51	3.21	3.35	2.39	3.72	2.47	4.31	3.62	2.34
Work patterns	15%	4.20	2.90	3.40	4.20	2.90	2.90	4.50	3.40	3.50
Methods support	15%	3.42	1.76	2.92	1.90	4.18	3.90	3.48	4.52	2.04
STRATEGY	50%	4.00	3.65	3.25	2.75	4.60	2.60	4.40	3.35	3.00
Product strategy	40%	4.00	4.00	3.00	3.00	4.00	2.00	5.00	3.00	3.00
Program enablement	35%	4.00	3.00	3.00	3.00	5.00	3.00	4.00	4.00	3.00
Corporate strategy	25%	4.00	4.00	4.00	2.00	5.00	3.00	4.00	3.00	3.00
Product cost	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
MARKET PRESENCE	0%	2.60	1.47	2.29	1.93	4.73	2.68	4.30	3.74	2.38
Installed base	30%	3.00	1.90	1.80	3.10	4.10	3.10	4.00	3.80	1.60
Revenue	20%	2.00	1.00	2.00	1.00	5.00	3.00	4.00	4.00	3.00
Services	15%	3.00	1.00	3.00	3.00	5.00	2.00	5.00	4.00	2.00
Employees	20%	2.00	2.00	3.00	1.00	5.00	2.00	4.00	3.00	2.00
Technology partners	15%	3.00	1.00	2.00	1.00	5.00	3.00	5.00	4.00	4.00

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

Source: Forrester Research, Inc.

VENDOR PROFILES

Leaders Blur Lines Between Experience Design And Process Design

- **Appian shines with strong vision for social and mobile engagement.** Appian's BPM suite platform provides a completely web-based environment for modeling, designing, and developing business process solutions. Since our 2010 BPM suite Wave evaluation, Appian has extended its leadership position for mobile and social engagement.⁹

Social engagement features are tightly integrated into the product in the form of social work streams, which allow users to “follow” process instances, activities, and other process-related events. One of the unique features of Appian's social work stream is that users can take process-related actions directly from work stream events, such as completing or reassigning tasks. Additionally, in the latest version of the product Appian provides a “records” view that allows

users to view different business objects (i.e., records) and processes associated with these objects. Users can also execute process-related actions from a given record or business object.

- **IBM delivers a unified experience for building enterprise-scale programs.** Just a few years ago, IBM's BPM offering consisted of a long list of cobbled together workflow, integration, business rules, and analytics products. In its latest release, IBM BPM has stitched all of these different components into a single offering by providing a consistent look and feel across the BPM stack. The result: a product that ticks all the key checkboxes and also provides a good foundation for collaboration across the different roles that make up BPM programs.

In this latest release, IBM built up social collaboration features, with a focus on providing best-in-class support for expert location and real-time work collaboration. Expert location features allow users to quickly see a list of experts for a given process instance or work item. Users can request help from experts to assist with completing a particular work item. Once contacted, the users can collaborate in real-time to fill out forms or walk through the steps of how best to complete a task. Additionally, IBM BPM provides a centralized repository for managing and reusing process-related development artifacts.

- **Pegasystems extends “build for change” to business stakeholders.** Pegasystems continues to lead with a strategic focus on delivering horizontal and vertical frameworks, built on top of its Pega BPM platform. Although the core BPM environment still requires a significant upfront investment in training and certification, arguably the platform lives up to its promise of delivering business agility. Since acquiring Chordiant in 2010, Pegasystems has focused on merging customer experience and process transformation software categories. Key to this shift is Pegasystems' “next-best-action” capability, which uses a sophisticated correlation engine to predict and recommend the next recommended step a user should take for a given process.¹⁰ In most cases, Pegasystems uses next-best-action to drive customer service interactions toward a desired or optimal outcome.

While Pegasystems has a long track record as a leader in the BPM suite market, the vendor's offering has always been tagged as developer centric, offering little functionality targeting nontechnical users and business architects. In the winter of 2012, Pegasystems unveiled a new component, “business profiler,” which targets business architects and is designed to help teams define, track, and manage the strategic aspects of delivering BPM. Based on the initial version of the product shown to Forrester, Pegasystems has set a new standard for empowering business architects to design and execute business change programs.

Strong Performers Offer Unique Approaches To Overcoming BPM Complexity

- **Bizagi offers a unique approach to marrying business processes and structured data.** Although Bizagi has been in the BPM suite market for over a decade, this marks the vendor's

debut in Forrester's BPM suite Wave evaluation. Originally focused on the Latin American market, Bizagi has made significant progress expanding its client base in North American and European markets. The vendor's BPM suite environment provides a consistent look and feel across all components and has established a track record around accelerating time-to-value for delivering BPM solutions.

A key differentiator for Bizagi is its unique data modeling approach that allows process designers to create a virtualized data model that provides a consistent way to manage and synchronize between business process models and source data and legacy applications. This approach allows process analysts and designers to minimize process model complexity. Instead of embedding unnecessary process activities for orchestrating and synchronizing data updates, much of this complexity can be shifted into the virtualized data model.

Additionally, Bizagi's design environment provides advanced support for tailoring business processes and forms for mobile devices. Specifically, the environment allows designers to create custom mobile-enabled widgets that can be reused across business processes and web-based forms.

- **Cordys provides a solid platform with emphasis on private cloud provisioning.** Cordys is a good option for teams seeking a developer-oriented environment for rapidly building and deploying business process solutions. The vendor's BPM suite offering provides a unified web-based design environment that supports designing and developing traditional process models and dynamic case models. Cordys is one of the few vendors evaluated that can support building a single process model that incorporates both of these process patterns into a single process solution.

Cordys is an ideal solution for teams looking to run multiple BPM projects in parallel and teams that need to accommodate multiple instances of business process environments across different regions or business units. The vendor's BPM suite environment supports multitenant configuration, allowing customers to quickly provision and manage multiple process instances through a platform-as-a-service (PaaS) configuration.¹¹

Additionally, Cordys offers an operational intelligence component as part of its BPM suite. This component allows nontechnical users to build process intelligence applications that sit on top of business data — including big data sources. Users can model these applications to monitor data sources and initiate and interact with business processes based on detected patterns and related events.

- **HandySoft delivers stronger capabilities than its ranking implies.** From a BPM suite perspective, HandySoft offers some of the most robust capabilities found in the market. Well priced and quick to deploy, HandySoft BizFlow provides a full-featured alternative for teams looking to get started without the hefty price tag or lengthy ramp-up time traditionally associated with BPM suites.

HandySoft continues to provide strong support for self-service analytics and developing dynamic forms. The vendor's web-based forms development environment, Webmaker, allows developers to build interactive forms that rival custom-developed J2EE web forms. Additionally, HandySoft's self-service analytics environment provides an intuitive interface for nontechnical users to build custom reports and dashboards for analyzing and reporting on process data.

In its latest release, HandySoft rolled out a new lightweight process design environment called Quick Process. Although Quick Process relies on the same underlying process engine, it allows nontechnical developers to build wizard-driven process solutions that require minimal process modeling or coding. Users outline basic process stages and input forms, and the process is ready for execution.

HandySoft's product road map focuses on expanding mobile device support, cloud deployment, and support for hybrid structured/unstructured business processes.

- **OpenText pivots to focus on smart process apps market.** In 2011, OpenText acquired two major vendors in the BPM suite space: Metastorm and Global 360. Since making these acquisitions, OpenText has worked to bring the two products together into its sprawling technology portfolio. In this BPM suite evaluation, OpenText positioned the MBPM offering (which is primarily based on key technology assets from the Metastorm acquisition) as its go-to-market BPM suite offering.

MBPM continues to offer a best-in-class user experience for the work area and task management features provided out of the box. These out-of-the-box features support social collaboration and allow users to drag and drop components to customize their work pages. Since the last BPM suites Wave, OpenText has beefed up MBPM's content integration capabilities, with tight integration with OpenText's content repository, customer communication management, and imaging components. OpenText plans to focus on using MBPM as a foundational component for building vertical and horizontal apps — what Forrester calls smart process apps.¹²

- **Oracle BPM suite is a great option for customers committed to the Oracle technology stack.** Since acquiring BEA Systems in 2009, Oracle has made significant progress in providing a unified environment that brings together BPM and service-oriented architecture (SOA) components. Although the vendor struggled initially with this marriage, the current release of the product provides a good blend of features that cater to both business analysts and technical developers.

Oracle BPM suite now ships with a web-based business-oriented modeling environment that allows teams to collaborate on process design. Additionally, Oracle now offers vertical and horizontal solution accelerators built on top of its BPM suite platform. Vertical accelerators primarily focus on financial services and public-sector use cases, while horizontal accelerators primarily focus on travel and service request use cases.

Of course, the real strength of Oracle BPM suite offering is its ability to integrate with the rest of the Oracle stack, ranging from Oracle Fusion Applications to Oracle SOA Suite and other applications. Oracle's future investment in the BPM suite offering will focus on deepening support for dynamic case management, building support for business architects, enhancing its mobile and social capabilities, and continuing to improve support for business analysts and nontechnical designers.

- **Software AG strikes good balance between project and program.** Software AG covers all of the bases for BPM suites, with a solid process development environment, intuitive process intelligence capabilities, and a leading business process analysis solution. Although these three environments are not integrated into a single unified offering, Software AG does a good job tying the environments together to make process models and data consumable and interchangeable. In this evaluation, Software AG was the only vendor to provide full support for “model-to-execute,” allowing process models to be shared and updated between Software AG's full-featured business process analysis environment (ARIS) and its full-featured business process development environment (webMethods). Software AG continues to provide best-in-class support for managing and reusing process artifacts through its standalone repository, CentraSite.

In the fall of 2012, Software AG announced that it would launch a new cloud-based offering for process design collaboration, called ARIS Connect.¹³ This new environment was presented as a lightweight web-based version of the vendor's fully-featured business process analysis platform, ARIS. The lightweight online version will target business architects and process architects overseeing BPM centers of excellence and change programs.

- **Tibco Software positions ActiveMatrix BPM to play key role in the event-driven enterprise.** In 2010, Tibco introduced ActiveMatrix BPM as a replacement for its flagship BPM suite offering, iProcess. While on the surface ActiveMatrix and iProcess share many of the same features, Tibco completely replaced the engine and architecture underneath. With ActiveMatrix BPM, Tibco continues to target IT departments looking to adopt developer-centric approaches to BPM.

The product's open architecture allows process developers to build sophisticated process solutions that take advantage of other Tibco components, such as the vendor's complex event processing environment (i.e., Business Events) and business analytics environment (i.e., Spotfire). A key differentiator for ActiveMatrix BPM is its organization modeling capability. This feature allows designers to visually model hierarchical organization structures and assign different workforce-related attributes — such as skills, cost, and competency — to users. Then process developers can use these attributes to embed workforce optimization scenarios into process models.

In 2011, Tibco acquired Nimbus Partners, a business process documentation vendor. The Nimbus platform primarily targeted business teams focused on documenting standard operating procedures for operational business processes. The Nimbus acquisition provided Tibco with a way to cater to nontechnical process teams and use cases. Although Tibco has partially integrated ActiveMatrix BPM and Nimbus, the two platforms continue to function as standalones.

Looking forward, Tibco plans to improve support for case handling, integration with its enterprise social platform (tibbr), and to evolve the Nimbus platform to provide support for business architects.

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:

- **Lab evaluations.** Vendors spent one day with a team of analysts who performed an 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.
- **Product demos.** We asked vendors to conduct demonstrations of their product's functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with two 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.

Forrester fielded its Q3 2012 Global Current State Of Business Architecture Online Survey to 337 EA professionals who are familiar with their firm's enterprise architecture or business architecture program. We sent the survey to members of our ongoing IT Research Panel, and we also used readership reports and sent the survey to those contacts who could accept emails. Only a portion of survey results are illustrated in this document. The panel consists of volunteers who join on the basis of interest and familiarity with specific IT topics. For quality assurance, panelists are required to provide contact information and answer basic questions about their firm's revenue and budgets.

Forrester fielded the survey in September 2012. Respondent incentives included the opportunity to gain complimentary access to the prepublished insight. Exact sample sizes are provided in this report on a question-by-question basis. Panels are not guaranteed to be representative of the population. Unless otherwise noted, statistical data is intended to be used for descriptive and not inferential purposes.

Forrester's Forrsights Budgets And Priorities Tracker Survey, Q4 2012 was fielded to 3,753 IT executives and technology decision-makers located in Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Japan, Malaysia, Mexico, the Philippines, New Zealand, Russia, Singapore, the UK, and the US from small and medium-size business (SMB) and enterprise companies with 100 or more employees. This survey is part of Forrester's Forrsights for Business Technology and was fielded from August 2012 to November 2012. LinkedIn Research Network fielded this survey online on behalf of Forrester. Survey respondent incentives include gift certificates and research reports. We have provided exact sample sizes in this report on a question-by-question basis.

Forrester's Forrsights Business Decision-Makers Survey, Q4 2012 was fielded to 3,616 IT executives and technology decision-makers located in Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Japan, Malaysia, Mexico, the Philippines, New Zealand, Russia, Singapore, the UK,

and the US from SMB and enterprise companies with 100 or more employees. This survey is part of Forrester's Forrsights for Business Technology and was fielded from August 2012 to November 2012. LinkedIn Research Network fielded this survey online on behalf of Forrester. Survey respondent incentives include gift certificates and research reports. We have provided exact sample sizes in this report on a question-by-question basis.

Each calendar year, Forrester's Forrsights for Business Technology fields business-to-business technology studies in more than 17 countries spanning North America, Latin America, Europe, and developed and emerging Asia. For quality control, we carefully screen respondents according to job title and function. Forrester's Forrsights for Business Technology ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of IT products and services. Additionally, we set quotas for company size (number of employees) and industry as a means of controlling the data distribution and establishing alignment with IT spend calculated by Forrester analysts. Forrsights uses only superior data sources and advanced data-cleaning techniques to ensure the highest data quality.

We have illustrated only a portion of survey results in this document. To inquire about receiving full data results for an additional fee, please contact Forrsights@forrester.com or your Forrester account manager.

ENDNOTES

- ¹ For a closer observation of this trend, see the January 6, 2010, "[TechRadar™ For Business Process Professionals: Human Resource Management Apps, Q1 2010](#)" report.
- ² For more information, see the September 4, 2009, "[The Importance of Matching BPM Tools To The Process](#)" report.
- ³ For more information about this BPM market consolidation, see the January 23, 2013, "[Prepare For 2013's Shifting BPM Landscape](#)" report.
- ⁴ For more information, see the August 30, 2011, "[Focus On Customers And Business Architecture For Greater Business Process Maturity](#)" report.
- ⁵ Source: Clay Richardson, "Design Thinking Blurs The Line Between Experience And Process Design," Clay Richardson's Blog, December 17, 2012 (http://blogs.forrester.com/clay_richardson/12-12-17-design_thinking_blurs_the_line_between_process_and_experience_design).
- ⁶ For more information, see the March 26, 2012, "[Mobile Is The New Face Of Engagement: An Executive Summary](#)" report
- ⁷ For more information, see the August 22, 2011, "[The ROI Of BPM Suites](#)" report.
- ⁸ For more information, see the August 22, 2011, "[The ROI Of BPM Suites](#)" report.

- ⁹ For more information, see the August 24, 2010, “[The Forrester Wave™: Business Process Management Suites, Q3 2010](#)” report.
- ¹⁰ For more information see the May 31, 2011, “[Best Practices: Next Best Action In Customer Relationship Management](#)” report.
- ¹¹ For more information about key platform-as-a-service vendors, see the May 19, 2011, “[The Forrester Wave™: Platform-As-A-Service For Vendor Strategy Professionals, Q2 2011](#)” report.
- ¹² For more information about how smart process apps will impact the market, see the August 8, 2012, “[Smart Process Applications Fill A Big Business Gap](#)” report.
- ¹³ Source: “Software AG’S ARIS 9.0 Brings The Power Of Social To Business Process Improvement,” Software AG press release, October 15, 2012 (http://www.softwareag.com/corporate/Press/pressreleases/20121015_Aris_9_0_page.asp).

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