

Magic Quadrant for Business Process Analysis Tools

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Business process analysis tools continue to grow in importance as business managers, process architects and process analysts seek to better understand, streamline and automate their business processes and communicate their needs to IT professionals.

WHAT YOU NEED TO KNOW

Business process analysis (BPA) tools are intended primarily for use by:

- Business architects, who require robust solutions aligned with enterprise architecture
- Business process (BP) architects, who redesign BPs at a conceptual level, regardless of whether there would be a business process management suite (BPMS) implementation
- BP analysts, who redesign processes at a more detailed level, often using a BPMS

BP analysts are also responsible for coordinating the implementation of the new processes as part of BPM projects, IT development projects and package purchase acquisitions. Although these roles are increasingly being performed by staff in end-user business units, many organizations still expect IT architects and analysts to perform these roles. As with the 2008 BPA tool Magic Quadrant, in 2009 we continued to focus on BP architects and analysts as the prototypical buyers of BPA tools.

BPA tools also can be used by other roles in the organization (for example, lines-of-business owners, departmental heads and operations staff). This is part of the growing use of “BPA for the masses,” embedding BPA into the everyday organization. We see this trend with increased use of automated and nonautomated “as-is” process discovery and cloud-based modeling to improve communication and collaboration. Technical, solution and information architects increasingly find value in BPA for modeling and simulating services and capabilities, increasingly seeking to better understand how BPs relate to and are designed and implemented in service-oriented architectures (SOAs).

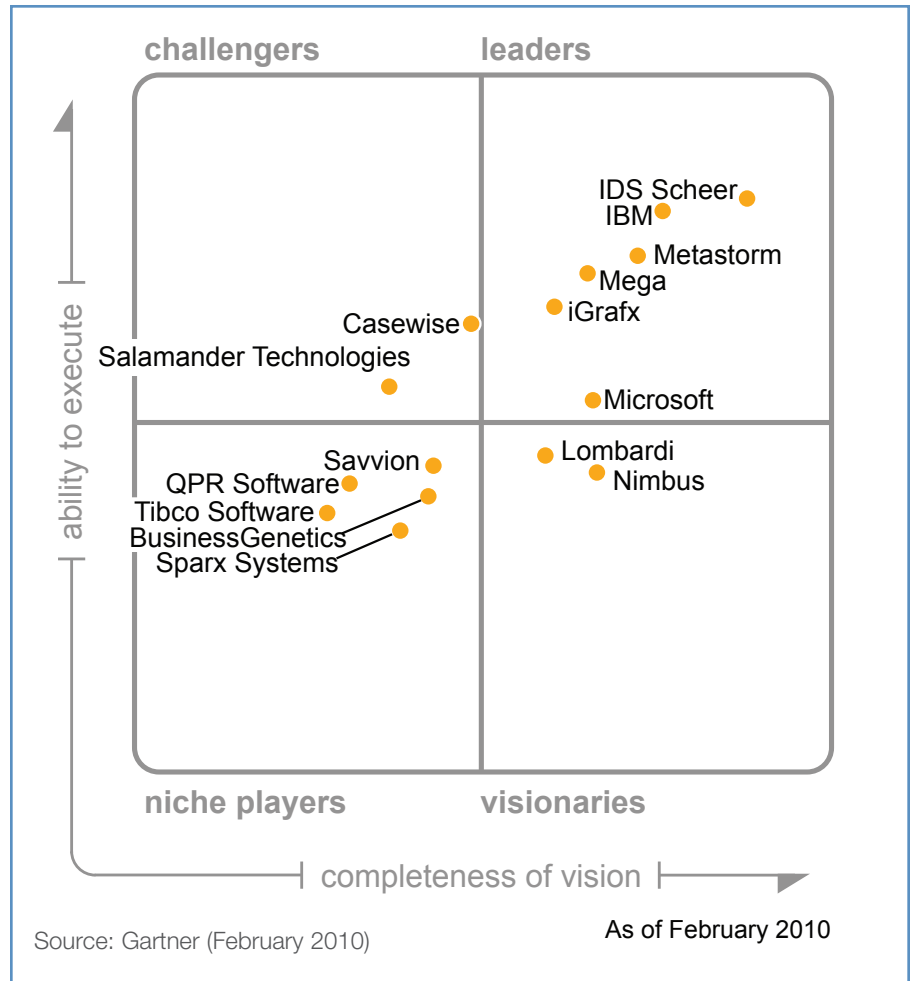
Organizations are also showing increased interest in having better integration across roles through the use of integrated or best-of-breed suites of tools that support modeling for BP, object-oriented and data/database analysis and design, as well as requirements management. For example, as a best practice, organizations are defining BPs, events and workflows in BPA tools, and are bringing this information into IT modeling tools and BPMSs, where more-detailed software and data service analyses, design and development occurs.

The BPA tool market sits between the enterprise architecture tool market and the BPMS tool market; not surprisingly, many BPA tools are sold into these markets for modelers with these focus areas. For example, different BPA tool selection teams want:

- A tool with an architectural focus, including support for models related to organizational, stakeholder and strategy issues.
- A solution that supports the integration of BP models with process assembly, workflow orchestration and optimization technologies.
- A tool that supports the integration of business processes and IT modeling tools to facilitate application development and package purchases.

BPA tools are key components of BP improvement initiatives, and the discipline of BPM. BPA tools are used by business analysts and architects to construct BP models. Process modeling is a key BPM technology when used in a BPMS (models are in sync with the implementation – that is, the BPM model artifacts should always reflect what's being executed). In this capacity, BPA tools complement BPMS tools by enabling deeper, multilevel modeling (conceptual, logical and physical in greater detail, including relationship mapping) than the modeling component of a BPMS. When used in conjunction with a BPMS, the BPA tool can be an integrated component of a single-vendor BPMS, or it can be a best-of-breed BPA tool that bridges into a best-of-breed BPMS. Linkage to the workflow assembly, orchestration engines and business activity monitoring (BAM) tools is driving BPA into the mainstream for BP improvement initiatives. BAM allows real-time or near-real-time data to be overlaid onto the BPA models, providing a rich key performance indicator (KPI) and process dashboard. Understanding complex BPs is a significant challenge. The assistance of a tool with visualization and other features – such as simulation and activity-based costing (ABC) – helps optimize BPs and realize BPM cost and time savings.

Figure 1. Magic Quadrant for Business Process Analysis Tools



Because the functionality of best-of-breed BPA tools and BPMS modeling tools overlaps so much, both types of products are included in this Magic Quadrant and must be evaluated in the context of a BPA use scenario, as described in this research. Beyond the scope of this Magic Quadrant are the issues related to the degree of integration among tools in a BPMS and how they share not only models, but all types of metadata.

What has been the growth rate for the BPA tool market during the past three to four years?

Based on Gartner estimates, the market revenue has grown consistently, an average of 10% to 15% during the past several years. Gartner BPA market estimates for new-product license and maintenance revenue in 2008 were \$415 million, and this grew to an estimated \$420 million in 2009, a slower growth compared to previous years, but expected given the financial climate in 2009.

A large follow-on market also exists for consulting and services in implementing these tools and the methods to use them. When calculating BPA market revenue, we did not include consulting or service revenue. For many vendors, this add-on consulting and service revenue significantly exceeds software revenue. Also, BPA tool vendors increasingly are adding complementary software products in the areas of governance, risk and compliance (GRC), as well as more-purchasable content in terms of prebuilt models delivered in their BPA tools.

What is the projected growth rate for the BPA tool market during the next few years?

Expanding the demand for BPA tools should result in at least a 10% compound annual growth rate in market revenue through 2010. We expect that the number of BPA users will grow at a significantly faster rate than BPA market revenue as the cost per seat decreases and as demand for low-cost cloud-based tools to support the more-casual user as part of a “BPA for the masses” scenario increases. This will create greater opportunities for selling increased BPA consulting services and will open up more cross-product marketing to vendors with multiple tool offerings as part of their BPMSs.

Do you expect the BPA market to disappear at some point because of vendor consolidations and the emergence of BPMSs? If so, then when do you expect this to happen?

We do not see the BPA market disappearing, even in the long term (that is, through at least 2015). As with any mature market, consolidation continues to be a factor. Building on previous years (the acquisition of Proforma by Metastorm and Telelogic by IBM), 2009 saw IBM acquire Lombardi, Progress Software acquire Savvion and Software AG acquire IDS Scheer.

The stability of BPA tool vendors is not based only on product sales. Most BPA vendors have a complementary set of consulting service offerings in such areas as BP methods and disciplines that can generate revenue at five times the BPA tool revenue rate; therefore, the stability of the BPA tool market – including smaller specialty/niche BPA vendors – is greater than may appear at first glance.

The BPA tool market will continue to attract new players, especially BPM/BPMS vendors extending their tools to provide greater BPA capabilities, and other vendors, such as those in the object-oriented analysis and design and data modeling/database design markets, extending their tools to support BPA. Because BPMSs include BPA technology as a key component, many organizations will implement an integrated single-vendor solution from their strategic partners during the long term. Currently, however,

the BPA tool market leadership is dominated by best-of-breed technologies. Therefore, opportunities will continue for specialty – generally niche – BPA vendors to flourish (see the vendors listed in the Honorable Mention section).

Another interesting and related dynamic is that the enterprise architecture tool market is extending increasingly down into the level of solution architecture, beyond the future enterprise technology architecture and into enterprise data, application and (especially) business architectures. Therefore, many leading BPA tool vendors, especially those that also have enterprise architecture tool offerings, can be expected to grow their BPA business “up” into the level of solution architecture as part of broader modeling suites.

At the same time, we expect consolidation in an overcrowded market. Many small players, especially those coming late to the market or failing to address alliance partnerships and distribution channels, will be bought, fall to niche status or slowly disappear. However, the overall BPA tool adoption rate will accelerate as mainstream organizations become more involved with BP modeling to support SOAs and address compliance issues with models based on government mandates, and buy and implement the next generation of model-driven application packages based on BP models and prebuilt service-oriented software and content.

MAGIC QUADRANT

Market Overview

Buyers’ focus has become more complex. Although we still weight the selection criteria for this BPA tool Magic Quadrant in favor of vendors with tools whose footprint best supports business architects, BP architects and BP analysts, we recognize that BPA tool purchases may be intended to solve the needs of a more diverse user base. These areas of buyer focus are not intended to be descriptions of job positions; they merely reflect how organizations prioritize who will use the BPA tools and, by extension, how the tools will be used. That is, if enterprise business architects are the prime target users of the tools, then their methods and the functions and features they need will be different from other users of the BPA tool, such as BP analysts working on BP automation projects using a BPMS. BPA tools can support a wide spectrum of roles that have varying degrees of business and technical expertise. Certain tools meet specific needs better than others, so it is important to prioritize who will use the tool and to understand the methods and functional requirements of tool use to choose the most appropriate product during the selection process.

Organizations should not consider vendor placement in this BPA tools Magic Quadrant as automatically reflecting which tools will best match their organizational needs. In some cases, a niche player or a tool mentioned in the Honorable Mention section of this research may be the best fit.

In the companion research “Understanding Vendor Placement in the BPA Tools Magic Quadrant,” we explore the issue of which vendors and products best meet users’ differing needs and how BPA solutions are compared and contrasted with one another.

Honorable Mention

Some vendors do not cleanly fall within the BPA market categories or don't meet the criteria for the Magic Quadrant, but are worthy of mentioning. Here are four products that you may be interested in:

Global Enterprise Managers

Global Enterprise Managers' GEMWorX FlowModeler extends Visio's modeling capabilities with more support for business modelers. Visio users can organize their process diagrams hierarchically, linked to each other (and to process-related resources), Web-published and navigated in a browser. GEMWorX's data-driven functionality includes new tools that arrived with version 5.1, and a lightweight learning management system that transforms FlowModeler/Visio diagrams into e-learning assets. FlowModeler is part of the GEMWorX Suite of integrated BP analysis and e-learning tools. It is repository-based, includes support for versioning and team sharing of model information (integration with Microsoft Office and SharePoint), and Monte Carlo simulation (with animation) for ABC. Users can add custom attributes and data elements to process shapes, automatically apply serial numbering to workflows, and generate either preformatted or custom reports for comparison, analysis and updating. The Workflow Explorer provides flexible search capabilities to Visio users who maintain and update process diagrams, and also to e-users, who view the model in a browser.

GEMWorX is focused on human-driven processes, so it emphasizes simplicity and clarity for the (Visio) modeler and the (Web-based) end user. Organizations that must produce end-user learning materials in coordination with model-based new development, package acquisition and BP improvement projects – including by large external service providers (consulting) and ERP (application package) vendors – will find GEMWorX worth considering, as will those expecting high levels of personnel turnover requiring training of new employees. New pricing for GEMWorX v.5.1 begins with a single-user Visio Productivity edition at \$895. However, most purchases will involve either the GEMWorX Company Team edition or the smaller Project Team edition. A Company Team, with 10 FlowModeler seats and 20 concurrent e-user logins, is priced from \$16,000 for an annual subscription to \$36,000 for a perpetual license. The Project Team includes three users (maximum of five) for \$8,495. Additional FlowModeler users are \$700 per seat, and blocks of concurrent e-user logins are nominally priced.

Orbus Software

Founded in 2004, Orbus Software markets a repository-based modeling tool, iServer, which uses Microsoft Visio as its primary user interface. The shapes on each diagram become repository objects (building blocks), and iServer manages the relationships among those objects. iServer has many capabilities similar to other popular repository-based BPA tools, such as those from Casewise and IDS Scheer's ARIS but with the advantage of being less expensive and easier to use. iServer comes with companion products, Publisher and Portal, which provide browser access to the repository.

Orbus Software is a recommended partner of Microsoft when there is a focus on Visio modeling using the Business Process Modeling Notation (BPMN) standard. One key distinguishing feature between iServer and other BPA tools is iServer's depth of Microsoft Office integration – for example, the traceability to and interrogation of individual components in Microsoft Word documents (such as KPIs, requirements, work instructions and risk profiles). Orbus's iServer Data Exchange product contains an Excel import/export interface for editing metadata and relationships offline. Although iServer competes head-on with other BPA tools, it also can be used in a complementary manner, with data interchange possible between iServer and any other modeling tool and data sources. iServer also interfaces with Microsoft SharePoint for document synchronization, ProModel Process Simulator for process simulation and K2's blackpearl for workflow and process automation.

iServer supports any industry standard or custom framework, such as Zachman, and also provides out-of-the-box solutions for The Open Group Architecture Framework (TOGAF 9) and the Information Technology Infrastructure Library (ITIL) v.3. iServer also comes with strong technical features, such as being able to "baseline" and compare different structures, models and documents across views, timelines and scenarios, as well as being able to set deadlines for document "packages" for given release dates and sets. To be included in the next Magic Quadrant, Orbus Software must grow its revenue significantly. However, the number of Visio users is substantial, and there is significant room for Orbus to grow the business with a well-executed marketing plan targeting them.

Ultimus

The Ultimus BPA tool, Process Designer, focuses on BP architects, analysts and BPMS modelers looking to model, automate, manage and optimize BPs. The product includes strong simulation, dashboarding and ABC, and comes with many people-centric features. Ultimus has a complementary BAM tool – the Ultimus iBAM Suite – which captures and displays KPIs from live process data and third-party applications, and supports "deep dive" analytics. Using the Ultimus iBAM Suite, which leverages the Ultimus Adaptive Discovery technology, in conjunction with Process Designer, complete roundtrip optimization of processes is enabled, making it possible to dynamically complete a feedback loop for process improvement. When iBAM is combined with Ultimus Enterprise Performance Manager (EPM), it extends optimization capabilities to the Ultimus Adaptive BPM Suite. However, these models can be used outside the Adaptive BPM Suite to analyze and optimize any data store, including a tight integration with Microsoft Visio and IDS Scheer's ARIS.

Because Ultimus BPA tools are the BP modeling components of its Ultimus Adaptive BPM Suite, customers should consider the extended use of Ultimus BPA tools at the architecture and analysis levels of modeling (in addition to the physical and workflow levels of process modeling), rather than consider a third-party, best-of-breed solution, although the latter remains an option. Ultimus is rated as a visionary in the BPMS tool market Magic Quadrant with Ultimus Adaptive BPM Suite. Process Designer sells for approximately \$300 for a workstation-based, project-level seat. Process Designer, combined with iBAM and EPM, sells for approximately \$3,000 to \$5,000. For unlimited enterprise use of Ultimus Process Designer, it costs \$25,000.

Fujitsu

The product is offered as a hosted or on-demand software-as-a-service (SaaS) model, which enables BP analysts and BPMS modelers to get started immediately, with all administration, operation and maintenance undertaken by Fujitsu.

A strong feature of Interstage is the Automated Process Discovery (APD) that allows for discovery and in-depth analysis of the current process at the transaction level. The APD features allow business and process analysts to develop the “as-is” model in a condensed time span – weeks not months. Interstage supports roundtrip engineering as the models move from discovered “as-is” within APD to “to-be” within Interstage BPM Studio and further analysis with Interstage BPM Analytics – giving full cycle visualization, closing the loop by using APD to validate the deployed “to-be.”

Interstage support for eXtensible Business Reporting Language (XBRL) via Interstage XWand products allows models to integrate into financial reporting and compliance, providing greater transparency. Interstage can import Microsoft Visio diagrams, allowing organization to leverage existing assets and extend “as-is” discovery features. It can also import IDS Scheer models, which will benefit BP modelers who wish to use a best-of-breed approach. Fujitsu has undertaken a global restructuring. The result is that the new reorganization is producing more synergies between Fujitsu software and service organizations.

Market Definition/Description

Gartner defines BPA as the business modeling space in which business professionals (that is, business users, business architects and BP analysts) and IT analysts collaborate on business architecture, transformation and improvement, including process analysis and design to support BP improvement initiatives. Business architects use BPA tools to work collaboratively with enterprise, technical, application and information architects as part of the organization’s solution architecture efforts. This ensures that the processes conform to the requirements, principles and models that support the enterprise’s change agenda – as captured in the gap plan and transition road map. BPA tools also are used by BP analysts and designers to capture the details of the BP, ensuring that process flow improves the quality of the requirement assessment for custom development, as well as that of as-is and to-be gap analyses in packaged implementations. Furthermore, BPA can serve as a bridge to improve the alignment of IT efforts with business initiatives.

Process modeling as part of BPA is becoming a starting point for a growing number of BPM and compliance projects. Conversely, most BPM projects start with tools that include process modeling in support of workflow and add a BPA tool to better understand their processes and simulate possible changes. Most BPA tools include BAM capabilities or partner with BAM tool vendors, including executive dashboarding into BPs.

Most BPA tools can be used for BP and workflow design and implementation in conjunction with best-of-breed BPM workflow and orchestration tools as part of a BPMS, or with the BPA tool vendor’s BPM product as a single-vendor BPMS. Most BPMS vendors have a process analysis, design and workflow modeling tool. Some vendors compete in the BPA market (or plan to do so), while others use the leading BPA tools as complementary business

architecture modeling tools to front end their project-oriented process and workflow design modeling tool. We did not address these latter process and workflow design modeling tools as part of the BPA market; Gartner considers the BPMS market separately. Similarly, many BPA tools can be used by enterprise architects as part of the enterprise architecture tool market, and these tools also were not considered as part of the BPA market. However, BPA models that are developed by business architects and analysts are expected to be leveraged in collaboration with other modelers in the organization, including enterprise architects, technical architects, information architects, application architects, and IT, BP and workflow designers. Therefore, BPA tool vendors that provide complementary capabilities in these areas receive some additional credit in the BPA market Magic Quadrant for having a wider breadth of solution.

Inclusion and Exclusion Criteria

We have chosen to include vendors meeting one or more of the following criteria in the BPA tool market:

- A total of 3% (\$13 million) or more in new product and maintenance license revenue in 2008/2009.
- Greater or equal frequency of appearance in inquiries by Gartner customers, as compared with competitors listed in the Magic Quadrant. (This must be relevant to the BPA market and identified as a vendor in this space.)
- Greater or equal frequency of appearance on Gartner customer evaluation shortlists, as compared with competitors listed in the Magic Quadrant. (This must be relevant to the BPA market and identified as a vendor in this space.)
- BPA tools that do not meet the aforementioned criteria but have some niche or specialty characteristic that could be of interest to Gartner clients (for example, a lightweight or good-enough BPA tool that is sold as part of a suite by a leading BPM vendor).

We used these inclusion and exclusion criteria for the 2010 Magic Quadrant.

Added

Nimbus and Salamander Technologies

Dropped

EMC and Sybase

Evaluation Criteria

Ability to Execute

We selected the same three major criteria and weightings as in 2008 to evaluate the ability of the vendors to execute in the BPA tool market. Other criteria not selected explicitly were factored into the three that were selected (for example, sales and marketing execution and operations were subsumed as part of overall viability). First, we identified customer experience as the highest-rated evaluation criterion. We evaluated the vendors’ and products’ ability to enable the success of BP architects and analysts in their jobs versus their competitors.

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product/Service	Standard
Overall Viability (Business Unit, Financial, Strategy, Organization)	High
Sales Execution/Pricing	No Rating
Market Responsiveness and Track Record	No Rating
Marketing Execution	No Rating
Customer Experience	High
Operations	No Rating
Source: Gartner (February 2010)	

Second, we rated highly product breadth and depth of functions and features, because many organizations want the most robust, best and most innovative technology. The technology with the best functions and features does not always make process architects and analysts the most successful. Third, we rated as slightly less important the overall (current) viability of the vendor and tool in the BPA market (see Table 1)

Completeness of Vision

We used the similar criteria and weightings for completeness of vision as we did in 2008. During the next five years, as the acquisition of BPA tools grows by mainstream and generally more-risk-averse organizations, vendor viability will become an increasing concern to buyers. Therefore, we rated business model vision as the most important aspect of the completeness of vision criterion.

For rating purposes, we included in the business model vision rating related criteria, such as market understanding, market strategy, sales strategy and geographic strategy. We rated offering (product) strategy highly, not so much because of shortcomings in the leading tools, but rather because we see opportunities to use improving functions and features, such as BAM and business rules, during analysis and design activities, as well as new diagram types, as standards continue to emerge – to further leverage the work of process architects and analysts. We included innovation in the rating for offering (product) strategy. Finally, we included vertical/industry strategy as a lesser-weighted criterion – but one that we see growing in importance as less-sophisticated (more mainstream) BP architects and analysts seek to jump-start their modeling efforts, buy models to save time, acquire “straw man” examples of best-practice BPs from leading third parties and better understand purchased applications.

More on Functionality Criteria

In “Selection Criteria for BPA Tools, 2H08-1H09,” we examined the following types of BPA tool functionality:

- Business model drawing/development

- Ease of use in operation/development and administration
- Integration and automation
- Multiuser support/versioning and extensibility
- Business model drawing/development
- Methodology and use
- Performance and scalability
- Vertical industry and horizontal cross-industry template support

Some key function/feature differences we used to rate tool

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	No Rating
Marketing Strategy	No Rating
Sales Strategy	No Rating
Offering (Product) Strategy	High
Business Model	High
Vertical/Industry Strategy	Low
Innovation	Standard
Geographic Strategy	No Rating
Source: Gartner (February 2010)	

functionality in this Magic Quadrant include the ability to support process simulation, ABC, BAM, industry standards and frameworks, bridges from/to other leading BPMSs and IT tools, and prebuilt/prepopulated models and content.

We used these inclusion and exclusion criteria for the 2010 Magic Quadrant (see Table 2).

Leaders

These are high-viability vendors with proven track records in BPA tools and high degrees of functionality or market penetration, as well as vision and business investment. They are also well-positioned for the future, because of completeness of vision – due to financial commitment and market share, technological differentiation or both. Leaders do not necessarily offer the best products for every customer project or role. However, they provide solutions that offer relatively lower risk. Leaders include IBM, IDS

Scheer (Software AG), iGrafx, Mega, Metastorm and Microsoft.

Challengers

Challengers are well-executing vendors that have less completeness of vision than leaders. In this Magic Quadrant, the challengers are Casewise and Salamander Technologies.

Visionaries

These vendors are differentiated by innovation in technology or sales and marketing. However, they have not achieved the record of execution required to reach a leadership position. In this Magic Quadrant, there are two visionaries – Nimbus and Lombardi.

Niche Players

These vendors' products can solve problems, although the vendors' vision and execution are relatively narrow in focus or lag behind leaders in some aspects of vision and execution. Customers that are aligned with the focus of a niche vendor often find that such providers' offerings are the best fit for their specialty needs. Current niche players include BusinessGenetics, Savvion, Sparx Systems, Tibco Software and QPR Software.

Vendor Strengths and Cautions

BusinessGenetics

Strengths

- BusinessGenetics has a unique, one-of-a-kind, business modeling methodology – eXtended Business Modeling Language (xBML) – which uses simple “what, who, when, where and which” questions done within a framework of rules to do process modeling.
- The xBML 5 dimensional models created by the xBML W5 Business Model Editor are managed in the xBML Model Manager.
- The xBML Business Requirements Document Auto-Generator uses an inference engine to directly translate xBML business models into business requirements.
- The xBML SAP Auto-Configurator uses an inference engine to translate xBML models into the four SAP configuration documents related to requirements, design, specification and interface needed for SAP implementations/configurations.
- There are a number of bridges to other leading BPA, IT and BPM technologies, including IDS Scheer's ARIS, IBM Rational Rose, CA ERwin and Software AG webMethods.
- BusinessGenetics has developed a number of integrations with

other products, including IBM Relational Software Architect (RSA), Software AG webMethods, Casewise and HP TestDirector.

- Gartner customer feedback gives a high satisfaction level, with multidimensional analysis and reporting, plus ease of use, being the most cited features.

Cautions

- BusinessGenetics has about 2% revenue share of the BPA tools market. (Inclusion is due to inquiry frequency.)
- The primary revenue source for BusinessGenetics is training and consulting in the xBML methodology, and the uniqueness of the methodology limits alternative sources of consulting and an available pool of experienced modelers using the xBML method and tools.
- Like other companies with a similar percentage of market share, BusinessGenetics must continue to deliver on client success and increased partnerships and distribution channels for its technology to improve its market position.

Casewise

Strengths

- Corporate Modeler has good technology depth, breadth and coverage. The Casewise Web Portal is a complementary module to the Corporate Modeler Suite, which offers direct access to the tool's extensible repository via a Web browser.
- The new Casewise WebModeler provides a Web-based, thin-client, on-demand modeling environment based on Windows Silverlight. This allows for fast deployment and project ramp up.
- BP architects will like the large number predefined process models and best-practice frameworks. Many of Casewise's models and frameworks have been externally endorsed and certified by the appropriate governing body (for example, Casewise is the TeleManagement Forum's model custodian for the enhanced Telecom Operations Map [eTOM] framework).
- Casewise Scheduler supports BPA/BPM governance and process life cycle management with change management workflow.
- Casewise GRC Accelerator addresses the area of governance risk and compliance, managing the complex overlaps between multiple regulatory compliances standards.
- Casewise's Corporate Synergy solution delivers comprehensive BPA integrated with enterprise architecture (EA) and BPM capabilities. A wizard-driven platform, it allows for cross-domain views to be developed.
- Casewise AutoModeler supports business discovery by

importing existing Excel, Word and Visio assets. Model elements are automatically generated and modeled within the Casewise repository.

- Casewise can be an excellent alternative to more-complex and expensive tools – especially IDS Scheer's ARIS and IBM System Architect.

Cautions

- Casewise has about 3.4% revenue share of the BPA tools market.
- Casewise provides a strong BPA offering, but it has not displayed leadership in specific areas of this market during the evaluation period, hence its move from the Leaders to Challengers quadrant. A stronger focus on road map execution is addressing this issue.

iGrafx

Strengths

- iGrafx's Enterprise BPA tools hit the "sweet spot" of buyers as they focus on the business/BP architect and analyst buyer categories, with some additional capabilities for those in the enterprise business architect, business architect and BPMS modeler categories.
- Based on Gartner customer feedback, iGrafx has a high satisfaction rating regarding ease of use and flexibility.
- iGrafx's BPA tools are repository-based and come with collaboration and communication functionality, and strong analysis, change and configuration management capabilities that support compliance and the coordination of teams across the enterprise.
- Organizations looking for a solution from a single vendor, which includes Visio-like capabilities as well as support for business/BP architects and analysts, should consider the iGrafx suite of BPA tools.
- iGrafx FlowCharter can be used to meet the modeling needs of business users and less-skilled business modelers.
- iGrafx Process addresses the needs of business process analysts, allowing for the natural maturation of BPA/business process improvement (BPI) methodologies and techniques.
- iGrafx Enterprise Modeler and iGrafx Process for Six Sigma address the needs of enterprise business/BP architects, with the robust methods and leading-edge functionality they require, as well as enterprise risk and compliance personnel, with integrated risk and compliance models.
- iGrafx BPA tools include bridges to many of the leading BPMSs.

Cautions

- iGrafx had a Gartner-estimated 3.5% revenue share of the BPA tools market.
- Like other companies with a similar size of market share, iGrafx must continue to deliver on client success and increase partnerships and distribution channels to improve its position in the Leaders quadrant.

IBM

Strengths

- IBM positions System Architect as its EA and BPA architect and analyst tool, with integration with WBM for those focused on BP analysis and process flow modeling in support of execution. WBM, as well as IBM's BlueWorks offering, provides strong business modeling and simulation capabilities for customers looking at BPA for their BPM projects.
- System Architect is now integrated with IBM Focal Point, which provides project and program planning and analysis.
- System Architect integration to Rational Change allows for improved BPA governance and change workflow.
- The new System Architect XT provides a Web-based, thin-client BPA environment and allows for greater collaboration. In addition, System Architect Process Integrator allows business users to provide process models to System Architect via Visio.
- With the combination of System Architect and WBM, IBM has a Gartner-estimated 17% revenue share of the BPA tools market.
- IBM is a leader in the areas of business requirements management and IT (object-oriented analysis and design) modeling, data modeling/database design and Java application development with tools with bridges between System Architect and its other tools.
- System Architect has full life cycle data modeling/database design and schema-generation capabilities, which assists BP architects and analysts in relating processes to data at multiple levels, and promotes better understanding between business and IT personnel.
- System Architect supports a variety of business process methods, reference models – including telecom (NGOSS), supply chain (SCOR), CPG and insurance (AKMA) – and federal financial models (IRMA). It also supports architecture frameworks, including Zachman, TOGAF, ArchiMate, FEAF, DoDAF, MoDAF and NAF.
- System Architect is frequently cited by customers as being a good solution for organizations looking for a single EA and BPA tool.

Cautions

- IBM System Architect needs to increase the number of partnerships and integration with other BPM/BPMS vendors, or

else risk being viewed as an IBM-centric BPA tool.

- Those with a BPA focus who are not interested in architecture or methodological rigor tend to find System Architect overly sophisticated for their needs – although it is possible to deploy System Architect in a manner where less-sophisticated modelers can be productive (such as by using System Architect XT or Process Integrator).
- IBM's acquisition of Lombardi will introduce a period of organization and product integration. Current and potential users need to monitor the situation carefully.

IDS Scheer

Strengths

- IDS Scheer has a Gartner-estimated 18% revenue share of the BPA tools market.
- Gartner customers report that ARIS has robust reporting and dashboard features across strategic, tactical and operational levels.
- ARIS is one of the most comprehensive enterprise and BP architecture toolsets on the market, with strong support for a wide variety of standards, methods and frameworks.
- ARIS is OEMed as Oracle's EA and BPA modeling tool of choice for its development environment, packages and BPMS.
- IDS Scheer has enhanced the process discovery features to allow dynamic analysis of current physical process, roles and tasks.
- ARIS is also OEMed as SAP's EA and BPA modeling tool of choice for its development environment and packages.
- The new ARIS Express product is a free, lightweight BPA product for low maturity or occasional use. It can be used for commercial use and has an upgrade path to ARIS professional products.
- ARIS includes features such as ABC, balanced scorecard, key indicator management and business rule design, while BAM capabilities are offered in IDS Scheer's Process Performance Manager, and simulation in ARIS Business Simulator.
- Buyers focused on the BP analyst and BPMS category of tools will find that ARIS provides added value to them in the form of extensive, predefined, industry-specific content and horizontal reference models to jump-start BP modeling efforts.
- ARIS includes bridges to the leading BPMSs.
- IDS Scheer has a workflow solution (engine) to automate its own governance process, which can be extended to third-

party products.

Cautions

- Those with a business process analysis focus who are not interested in architecture or methodological rigor tend to find ARIS overly sophisticated for their needs – although it is possible to deploy ARIS in a manner where less-sophisticated modelers can be productive.
- Those with a BPMS focus should consider augmenting the modeling tools of their BPM vendors with ARIS for the architects in their organizations.
- IDS Scheer's acquisition by Software AG will introduce a period of organization and product integration. Current and potential ARIS users need to monitor the situation carefully.

Lombardi

Strengths

- Blueprint is offered via an on-demand SaaS model, which enables business process analysts and BPMS modelers to get started immediately with Blueprint, as opposed to waiting for IT personnel to install and manage the software and data. Blueprint administration, operations and maintenance are undertaken by Lombardi hosting services.
- Blueprint is focused on BP analysts and BPMS modelers looking to develop business plans and business cases; relate them to key performance goals, indicators and business processes; and view this information in a variety of ways – including as a process map, BPMN and training documentation.
- Presence notification allows for real-time collaboration with combined logging for auditing. A user can choose to pull or have comments and updates pushed to him or her at log on.
- Blueprint contains lightweight process mapping and modeling capabilities with support for BPMN 2.0 and XML Process Definition Language (XPDL) interchange format. It is not intended to be a direct competitor to the leading BPA tools used by enterprise and business/BP architects, but can be used with them as a complementary process discovery, planning and analysis tool.
- Blueprint allows for the capture of as-is, nonsystem process knowledge using a crowdsourcing approach that leverages SaaS-based delivery. Information can be imported from a variety of sources, including Microsoft Visio and Office applications.
- Blueprint comes with a shared repository for all models, which includes real-time discovery and collaboration, private and shared assets, revision history and audit trail.
- Those starting with Lombardi's BPMS and wanting to add integrated process modeling should view Blueprint as a complementary and natural extension. Blueprint uses

a shared model repository, which allows for roundtrip modeling and execution.

- Blueprint is licensed solely through an on-demand SaaS model. Its list price is \$50 per user per month for an author license and \$10 per month for a participant (reader) license. This includes its process mapping, modeling and documentation capabilities, as well as support for importing and exporting Blueprint models between Teamworks or other process modeling products.

Cautions

- Lombardi has a Gartner-estimated revenue share of less than 1% of the BPA tools market. (Inclusion is due to inquiry frequency.)
- Like other vendors with a similar size of market share, Lombardi must continue to deliver on client success and increase partnerships and distribution channels to improve its position in the Leaders quadrant.
- Lombardi's impending acquisition by IBM will introduce a period of organization and product integration. Current and potential Blueprint users need to monitor the situation carefully.

Mega

Strengths

- Mega Modeling Suite has a comprehensive set of tools for modeling in its repository-based environment, with strong EA support for business, technology, data and application architecture modeling.
- As part of the Mega Modeling Suite, the company also has tools focused on the BP modeler category of buyers, including Mega Process and Mega Simulation for BP modeling and simulation.
- The Mega Control and Risk product addresses GRC issues (i.e., Sarbanes-Oxley and Basel II requirements) integrated with the process models.
- Mega TeamWork provides governance workflow via a customizable process for change management through the circulation of information, requests for change, notifications and reviews.
- The Mega GRC Platform and Mega Advisor technology provide business users with dynamic Web access to enterprise blueprints and operational data about process performance and risk.
- The Mega Modeling Suite can perform a variety of modeling and specification tasks to enable more-sophisticated modelers and architects – yet, Mega's platform parameterization, filters and options enable each user to benefit from the simplest interface, customized to each user's needs.

- The Mega Open Kit Approach (MOKA) methodology allows users to define customizable method libraries like ABC, Six Sigma, TOGAF and Balanced Scorecard. MOKA allows for the definition of phases and deliverables within the repository.
- The Mega Modeling Suite includes information and data architecture tools providing data modeling, SQL and XML schema generation, as well as reverse-engineering features that can be of use to process analysts.
- The Mega Modeling Suite has features such as quality management, balanced scorecard, key indicator management and business rule design, as well as business process simulation and BAM capabilities.
- Mega generally has deep and long-term relationships with its clients through successful engagements, and, as a result, its customer service ratings are among the highest reported to us in the BPA tool market.
- Mega has entered into a strategic partnership with BPM vendor Appian for full roundtrip modeling and execution.
- Mega Process generates Business Process Execution Language (BPEL) for use by rule engines and BPM tools, and Mega Modeling Suite integrates with the tools of a number of BPM tool vendors.
- Mega's SolMan product allows for integration into SAP via Solution Manager for SAP process discovery.

Cautions

- Mega has a Gartner-estimated 3.0% revenue share of the BPA tools market.
- Like other vendors with a similar size market share, Mega needs to demonstrate that it can execute on its vision for improving its business model to improve its position in the Leaders quadrant.

Metastorm

Strengths

- Metastorm BPM and Metastorm ProVision is a strong combination for organizations looking for a single integrated BPA/BPM supplier.
- Metastorm is rated a leader in the 2009 EA tools market Magic Quadrant, making it a good solution for organizations looking for a single tool able to support both EA and BPA.
- Metastorm Discovery allows for the capture of as-is, nonsystem process knowledge using a crowdsourcing approach using a variety of devices, including PDAs.

- Gartner estimates 65% of Metastorm ProVision sales are focused on business/BP architects, 20% on BP analysts and 15% on enterprise architects – making it well-positioned to meet the needs of multiple BPA roles.
- There is a high degree of market awareness of Metastorm ProVision. Metastorm is one of the vendors for which we get the most inquiries by name (only Visio and IDS Scheer ARIS are greater), and Metastorm ProVision appears on the largest number of finalist lists of customers we speak to.
- Based on Gartner customer feedback, Metastorm has one of the highest customer satisfaction ratings in the BPA market.
- Metastorm ProVision has robust features, such as simulation, ABC and the ability to take execution data back into its analytics dashboard.
- ProVision includes bridges into many of the leading BPMSs. It also supports SAP integration via Metastorm ProVision Connect for SAP.

Cautions

- Metastorm has a Gartner-estimated 3.4% revenue share of the BPA tools market.
- Like other vendors with a similar size of market share, Metastorm must continue to deliver on client success and increase partnerships and distribution channels to improve its position in the Leaders quadrant.

Microsoft

Strengths

- The low cost and ease of use of Microsoft's BPA tool, Visio, have resulted in Microsoft having, by far, the largest number of actual implementations of any process modeling tool. Gartner estimates Visio revenue in the BPA tool market to be about \$160 million (36% revenue share of the BPA tool market).
- Microsoft Visio is focused on enabling the visual documentation, analysis and design of a range of systems and business processes, and is a core component of Microsoft's process management disciplines, including those related to quality, compliance and BPM.
- Visio's ability to use Word, Excel and PowerPoint files from Microsoft Office – where most organizations store their knowledge about their business processes – makes Visio very popular with the "average" business user.
- Due to cost, ease of use and integration with Microsoft Office, Visio tends to be the first tool that architects and analysts in most organizations use when they start their BPI initiatives,

later possibly adding a more robust BPA product. Note: Global Enterprise Managers's GEMWorX and Orbus Software's iServer are tools that can be used to extend Visio (see the Honorable Mention section of this research).

- BP architects, analysts and BPMS modelers can transform Visio diagrams into a graphical front end for line-of-business data. They can visualize information stored in Visio in multiple formats, including being able to view KPIs on top of business process diagrams or in the context of data's source, and view process and production data in the form of value stream maps, or cause-and-effect diagrams.
- Visio includes prebuilt process templates for use by business architects and analysts to jumpstart process modeling efforts – such as those for the factory floor process, PC assembly process flow, supply chain workflow and fault tree analysis.
- Microsoft has a strong partnering strategy with Visio, including BPA and BPMS partners such as Simul8 and Ascentn, itp-commerce, Bluespring Software, K2 and Global 360.

Cautions

- Although Visio can be a low-cost, easy-to-use way to get started with BPA, most BP architects and analysts will not consider it a direct competitor to any of the other market leaders in terms of functions and features.
- If and when Visio customers reach the point where they need greater functionality for enterprise and business/BP architects and analysts, they should look to Visio partners or consider acquiring a complementary BPA tool with a Visio bridge.

Nimbus

Strengths

- Nimbus Control can be installed on-premises and is offered via an on-demand SaaS model, which enables BP analysts and modelers to get started immediately. Nimbus administration, operations and maintenance are undertaken by Nimbus hosting services.
- Nimbus Control allows for the capture of system and nonsystem process knowledge using a crowdsourcing approach, with imports from the other modeling tools.
- Nimbus Control has bidirectional integration to SAP Solution Manager and can configure and invoke SAP processes. It has similar integration with Oracle and salesforce.com.
- Nimbus Control's integration to Microsoft Office and Office

SharePoint Server allows for the capture of process knowledge using crowdsourcing.

- Gartner clients report high satisfaction with Nimbus Control's ability to scale and support for both the BPA and non-BPA communities.
- Nimbus Control provides governance with change and approval notification and workflow.
- Nimbus Control provides direct work instructions (either linking to existing documentation or directly into BP steps) and the invocation of any related application.
- Data from business intelligence (BI) products and data sources (including SAP Business Warehouse, Microsoft SQL, Microsoft PerformancePoint and Microsoft Excel) is displayed on processes and dashboards in personalized collaborative portals.
- Role-based story boards help to provide an end-to-end view of the process from an individual user's perspective – using what Nimbus calls its Intelligent Operations Manual.
- Self-certification is provided to identify risk and business controls, and demonstrate compliance by process instance or on a periodic basis.
- Recently, Nimbus introduced access to process content from mobile devices such as the Nimbus iPhone application with a “just enough” approach to displayed information.
- In 2009, cost per seat started at \$150 for role-based consumers of content, up to \$5,000 for authors/modelers responsible for the content.

Cautions

- Nimbus has a Gartner-estimated 2% revenue share of the BPA tools market. (Inclusion is due to inquiry frequency.)
- Like other vendors with a similar size of market share, Nimbus must continue to deliver on client success and increase partnerships and distribution channels to improve its position.

QPR Software

Strengths

- QPR tools are well-suited to BPA in support of corporate performance management, risk and compliance.
- QPR ProcessGuide is integrated with Microsoft Office and SharePoint to allow process discovery of existing assets.
- QPR reporting features allow for the development of reusable reports dynamically linked to physical processes.
- QPR ProcessGuide can render models in many different languages, allowing for easier internalization of process assets.
- QPR ProcessGuide Xpress is a stand-alone version of QPR ProcessGuide without some repository and integration features. It's offered as an alternative to Visio and lightweight flowchart products.
- QPR Portal allows for online repository-based collaboration. Comments, actions, reports and change events can be captured within the models.
- QPR ProcessGuide supports standard notations, such as BPMN and ArchiMate, but it is also focused on domain-specific notations based on client needs.
- QPR ProcessGuide integrates with QPR ScoreCard to provide business and operational KPI dashboards in real time.
- QPR ProcessGuide Xpress' stand-alone license is approximately \$700 per seat, and system license for small to midsize enterprises is typically \$30,000. Subscription pricing is available as an option.

Cautions

- QPR has a Gartner-estimated 2% revenue share of the BPA tools market. (Inclusion is due to inquiry frequency.)
- Like other vendors with a similar size of market share, QPR must continue to deliver on client success and increase partnerships and distribution channels to improve its position.

Salamander Technologies

Strengths

- Salamander Mood has a strong emphasis on combining EA and industry frameworks with operational intelligence and BI.
- Salamander has a proven track record of providing BPA tooling and services to the defense, petrochemical and logistics markets.
- Salamander has strategic relationships with a number of prime defense organizations and system integrators.
- Salamander's Mood product supports the development of business- and technology-focused, domain-specific models across multiple viewpoints of the organization.
- Mood Active Enterprise supports strategic planning and decision-making processes through a range of process automation facilities aligned with Mood activities, in a Web environment.

- Individual license of MooD costs approximately \$12,000 for a single user, \$120,000 for a project and \$400,000 for an enterprise.
- Gartner customers report that the MooD meta-model is simple but robust, and allows for user-defined extensions to be added quickly.
- MooD allows for Visio diagrams to be mapped to the MooD repository and imported for use with BPA/BPM projects.

Cautions

- Salamander does not have a wide geographic presence, with customers primarily located in the U.K. and western European countries. It needs to gain greater traction in North America and Asia to improve its position on this Magic Quadrant.
- Salamander has a Gartner-estimated 3% revenue share of the BPA tools market. Like other vendors with a similar size of market share, Salamander must continue to innovate and deliver on client success to improve its position.

Savvion

Strengths

- Those starting with Savvion's BPMS and wanting to add integrated process modeling should view its Process Modeler BPA tool as a complementary and natural extension – although Savvion reports that Process Modeler and its Process Asset Manager are stand-alone products sold separately and usually precede the sale of its BPMS.
- Savvion provides BPA extended functionality for business/BP architects and analysts, and with its Process Asset Manager, it provides full model collaboration, change management and governance. This feature will be beneficial to BP owners and participants who are responsible for audits and controls.
- Savvion also provides BPA functionality as part of its process design studio (automation studio) for BPMS modelers.
- Savvion reports that there have been more than 100,000 downloads of its BPA tool, Savvion Process Modeler, but it is difficult to track the actual use of the tool once downloaded.
- Savvion offers subscription-based, on-demand BP analysis supporting full round-tripping with the desktop modeler. Web-based modeling is optimized for collaborative editing of the processes in real time, including discussion threads, history and documents.
- The Web-based modeler includes a full-featured simulation engine. The generated simulation reports can be made available in the process center and shared with the community.

- Process Modeler comes with tabular views of process definitions for greater ease of use than most tools, and Savvion BusinessExpert provides greater support for monitoring via business dashboards and metrics.

- Process Modeler can create, manage and print very large process models (a shortcoming in many tools), and comes with good technology features, such as advanced goal-based simulation and very granular simulation for activity-based costing for system, human, consumable and nonconsumable resources.

- Savvion has also added a “project-oriented processes” usage scenario into modeling that brings project portfolio management and process analysis together, and includes Microsoft Project import and export capabilities.

- Savvion provides vertical templates and process models for the telecommunications, ITIL, financial services and clinical trials domains.

Cautions

- Savvion has less than 2% revenue share of the BPA tools market. (Inclusion is due to inquiry frequency.)
- As with other BPMS vendors offering a stand-alone BPA tool, it must continue to grow sales beyond the users of its BPMS.
- Savvion's acquisition by Progress Software will introduce a period of organization and product integration. Current and potential users need to monitor the situation carefully.

Sparx Systems

Strengths

- Sparx Systems' Enterprise Architect is best known as the leading object-oriented analysis and design tool, with good data modeling/database design capabilities in support of application and data architects, analysts and developers.
- Existing Enterprise Architect customers should view extending the use of the product into business architecture and process modeling as a complementary and natural extension of their object-oriented analysis and design process.
- Business/BP architects and analysts who are not currently using Enterprise Architect will find Sparx Systems of interest as a low-cost provider with good technology. The cost is \$239 per seat for the Corporate Edition of Enterprise Architect, \$599 per seat for the Business and Software Engineering Edition, which includes all BPA and SOA functionality. Two hundred licenses would cost about \$37,000 for the Corporate Edition and \$83,800 for the Business and Software Engineering Edition. All software is downloadable from the Sparx website.

- Since it was commercially released in 2000, Enterprise Architect has more than 200,000 licensed users worldwide. Sparx reports that over 60% of the top 100 global firms have volume licenses of Enterprise Architect.
- Despite the low cost of Enterprise Architect, Sparx Systems is known to deliver high-performance, scalable tools that are suited for enterprisewide deployment.
- Sparx's Model Driven Generation (MDG) technology provides Enterprise Architect with links into Microsoft Visio and Visual Studio, as well as Eclipse (Java) open-source tools. It supports numerous standards and frameworks, including CORBA, Zachman, DDS, ArchiMate and OMG specifications for SysML, SoaML, DoDAF/MODAF (UPDM).
- Enterprise Architect is also able to model, document and restructure processes and information flows using industry-standard BPMN and UML, and the process designs and models can be used to drive software development, including reverse engineering of legacy code and database models, and roundtrip synchronization with C, C++ and Java code.

Cautions

- Sparx Systems has less than 1% revenue share of the BPA tools market. (Inclusion is due to inquiry frequency.)
- As with other application and data architecture, analysis and design modeling tool vendors who also offer BPA tool capabilities, Sparx Systems must continue to grow sales beyond its existing base of Enterprise Architect customers to reach the Leaders quadrant.

Tibco Software

Strengths

- Tibco Business Studio is an Eclipse-based, open-source BPA solution with BAM capabilities and support for rules and analytics.
- Those starting with Tibco Software's BPMS and wanting to add integrated process modeling should view its Business Studio BPA tool as a complementary and natural extension.
- Tibco Software's focus for Business Studio is on BP architects and analysts and BPMS modelers to develop executable process models.
- Tibco offers Business Studio Community Edition with no formal support, but users can use the community forum to post questions. The forum is monitored by Tibco engineers. Business

Studio Edition (a full BPMS suite) is available for \$500, plus associated maintenance (18% to 24% range).

- Tibco reports that there have been more than 50,000 downloads of its BPA tool Business Studio, (more than 10,000 in the past year), but it is difficult to track the actual use of the tool. Tibco's entire product suite (including Business Studio) offers an end-to-end BPM solution in the range of \$150,000 to \$300,000.
- Tibco has built an extensive support network through its developer site for Business Studio, and provides periodic webinars, tutorials and white papers to encourage users to get familiar with all aspects of the product.
- Business Studio supports discrete event simulation with reporting for cost-time analysis and process optimization.
- Gartner customer feedback gives a high satisfaction level, with ease of use being the most cited feature.
- Enterprise architects use Business Studio to do service component architecture (SCA) composition and to develop Java and .NET services. The development of .NET is done through plug-ins to Microsoft Visual Studio .NET; .NET assemblies can be imported into Business Studio.
- Business Studio supports Unified Modeling Language (UML) 2.0 and UML profiles, and comes with bridges for Microsoft Visio, IDS Scheer's ARIS, XPDL and XML.
- Business Studio has the ability to create and import methodology templates, such as the Prince2 methodology from the U.K., and provides best practices in a library of BPMN fragments and modeling patterns.

Cautions

- Tibco has a Gartner-estimated revenue share of less than 1% of the BPA tools market. (Inclusion is due to inquiry frequency.)
- As with other BPMS vendors offering a stand-alone BPA tool, it must continue to grow sales beyond the users of its BPMS.

Vendors Added or Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor appearing in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. This may be a reflection of a change in the market and, therefore, changed evaluation criteria, or a change of focus by a vendor.

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor that compete in/serve the defined market. This includes current product/service capabilities, quality, feature sets and skills, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability (Business Unit, Financial, Strategy, Organization): Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness and Track Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word-of-mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the Web site, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services, and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.