

The Forrester Wave™: Digital Process Automation For Wide Deployments, Q1 2019

The 10 Providers That Matter Most And How They Stack Up

by Rob Koplowitz and John R. Rymer

March 12, 2019 | Updated: March 25, 2019

Why Read This Report

In our 30-criterion evaluation of digital process automation for wide deployment (DPA wide) providers, we identified the 10 most significant ones — AgilePoint, AXON Ivy, bpm'online, FlowForma, JobRouter, K2, Newgen Software, Nintex, PMG, and Ultimus — and researched, analyzed, and scored them. This report shows how each provider measures up and helps application development and delivery (AD&D) pros select the right provider for their needs.

Key Takeaways

Nintex And AgilePoint Lead The Pack

Forrester's research uncovered a market in which Nintex and AgilePoint are Leaders; bpm'online, AXON Ivy, Newgen Software, and K2 are Strong Performers; FlowForma, Ultimus, and JobRouter are Contenders; and PMG is a Challenger.

Process Support And User Development Were The Differentiators

As traditional business process management (BPM) environments become dated, customers demand strong support for complex process capabilities with low-code programming tools that pull businesspeople deeper into the development process.

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[The Forrester Wave™: Digital Process Automation Service Providers, Q3 2018](#)

[Process Mining: Your Compass For Digital Transformation](#)

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DPA Wide Is All About Rapid Development Of Process Applications

The role of process in successful digital transformation continues to grow, and the sheer volume of software it takes to address the overall requirements for it is exploding. Process automation has emerged as a requirement for many organizations.¹ The need is critical, and process professionals cite digital transformation as the primary goal of process initiatives over the next two years.² As process and low code merge, DPA wide vendors look to strike the balance between robust process, rapid development, and low cost.

As a result of these trends, DPA wide customers should look for providers that offer:

- › **Strong process and process orchestration capabilities.** The defining characteristic of DPA wide is the ability to build process-driven applications at scale. Robust process mapping, orchestration, and maintenance of processes without coding are essential. Additionally, customers often require process capabilities like robotic process automation (RPA) integration, case management, and business rules and decisioning, which should be part of their evaluation.
- › **Low-code tools that support rapid development of hundreds of applications.** A declarative development environment supports rapid development by professional developers or, for some offerings, business-user-accessible development tools. Low-code tools allow more rapid development to meet large-scale automation requirements, but they also expand the population of potential development resources by lowering complexity and technical requirements.
- › **The ability for IT to govern a lot of applications that are deployed quickly.** Low-code development promises both speed and volume of new software. With that speed and volume comes the requirement for governance tools that IT can apply to ensure that data and processes, particularly for customers and employees, are secure and private and meet regulatory compliance standards. These solutions need tools to ensure that data access and application deployments can be handled at scale to meet a wide array of governance requirements while minimizing the burden on IT.

Evaluation Summary

Our Forrester Wave™ evaluation highlights a market in transition. As the old BPM market disappears, it is being replaced by vendors that focus on rapid development, fast realization of value, and deep participation from business stakeholders. As such, the market has split into vendors that focus on serving the most complex use cases while still providing low-code tools (DPA for deep processes) and those we evaluate here that focus on driving up adoption through lower cost and complexity. These categories overlap significantly, and Forrester recommends looking at vendors in both of them to meet all of your process and low-code requirements.

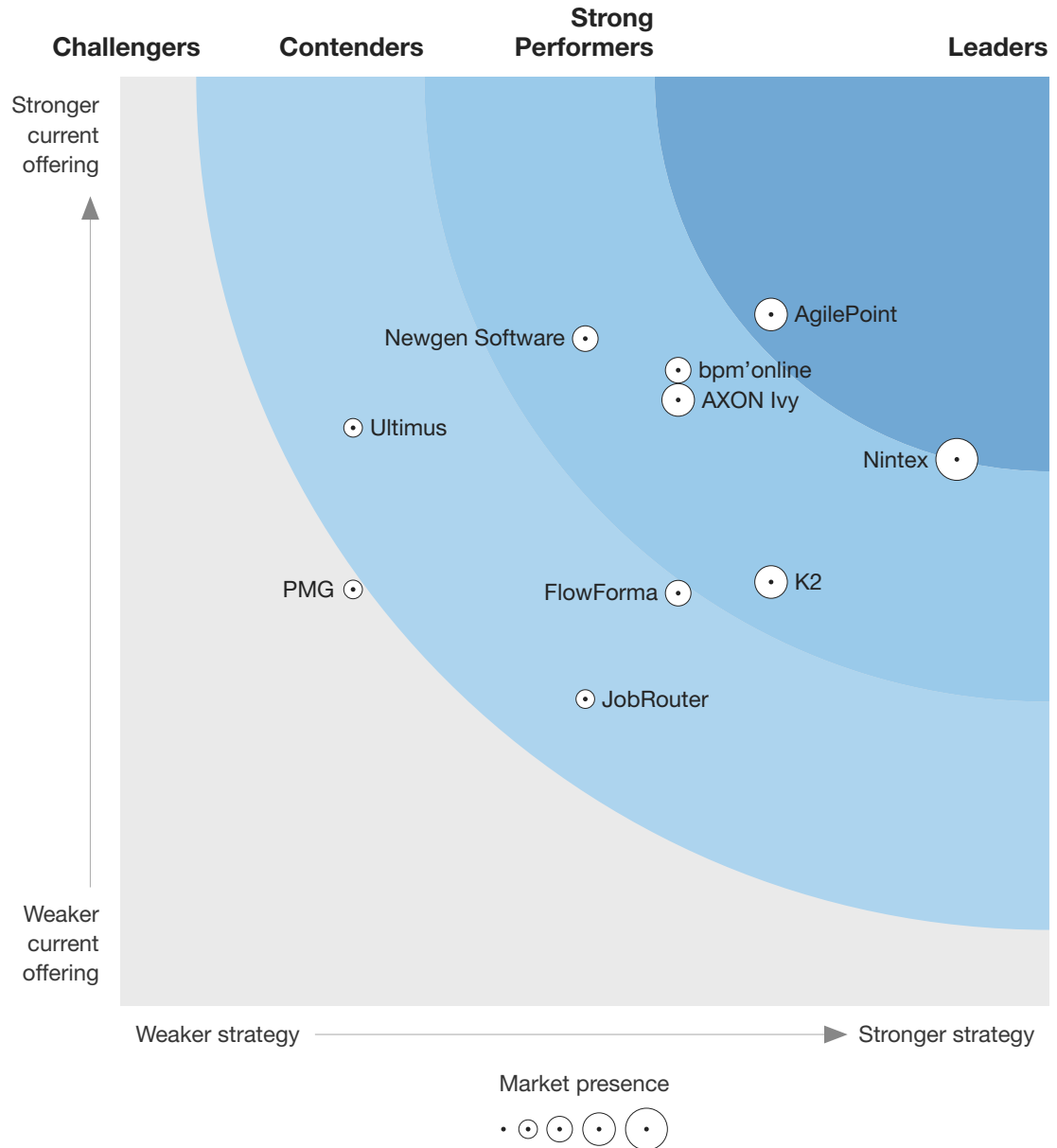
We intend this evaluation of the DPA for wide deployments market to be a starting point only and encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

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FIGURE 1 Forrester Wave™: Digital Process Automation For Wide Deployments, Q1 2019**THE FORRESTER WAVE™****Digital Process Automation For Wide Deployments**

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FIGURE 2 Forrester Wave™: Digital Process Automation For Wide Deployments Scorecard, Q1 2019

	Forrester's weighting	AgilePoint	AXON Ivy	bpm'online	FlowForma	JobRouter	K2	Newgen Software	Nintex	PMG	Ultimus
Current offering	50%	3.72	3.26	3.42	2.22	1.65	2.28	3.59	2.94	2.24	3.11
Tooling for application development	33%	3.96	3.60	3.44	1.64	1.74	2.84	4.40	3.00	2.32	2.96
Tooling for platform and application	33%	3.40	3.80	3.00	2.60	1.00	2.20	3.80	2.40	1.80	4.20
Application deployment and operations	34%	3.80	2.40	3.80	2.40	2.20	1.80	2.60	3.40	2.60	2.20
Strategy	50%	3.50	3.00	3.00	3.00	2.50	3.50	2.50	4.50	1.25	1.25
Vision and strategy	25%	3.00	1.00	1.00	3.00	3.00	3.00	3.00	5.00	1.00	1.00
Training, community, and marketplace	25%	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	1.00	1.00
Partners	25%	3.00	3.00	5.00	1.00	3.00	3.00	3.00	5.00	0.00	3.00
Commercial model	25%	5.00	5.00	3.00	5.00	1.00	5.00	1.00	5.00	3.00	0.00
Market presence	0%	3.67	2.34	2.01	2.66	2.00	3.01	3.00	4.01	1.67	1.68
Revenue generated by DPA wide sales	33%	2.00	2.00	2.00	1.00	1.00	3.00	4.00	5.00	1.00	1.00
Revenue growth rate	33%	5.00	2.00	1.00	5.00	3.00	2.00	2.00	2.00	2.00	1.00
Number of enterprise customers	34%	4.00	3.00	3.00	2.00	2.00	4.00	3.00	5.00	2.00	3.00

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

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Vendor Offerings

Forrester included 10 vendors in this assessment: AgilePoint, AXON Ivy, bpm'online, FlowForma, JobRouter, K2, Newgen Software, Nintex, PMG, and Ultimus (see Figure 3).

FIGURE 3 Evaluated Vendors And Product Information

Vendor	Product evaluated	Product version evaluated
AgilePoint	AgilePoint NX	7
AXON Ivy	Axon.ivy Digital Business Platform	7.2
bpm'online	bpm'online	7.13
FlowForma	FlowForma Process Automation	7.0.2
JobRouter	JobRouter	4.3
K2	K2 Cloud and K2 Five	K2 Cloud and K2 Five 5.2
Newgen Software	Newgen OmniFlow iBPS Suite	4
Nintex	Nintex Platform	N/A
PMG	PMG Digital Business Platform	8.6
Ultimus	Ultimus Digital Process Automation Suite 2017	N/A

Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

Leaders

- › **Nintex leads the charge to make businesspeople into developers.** The Nintex mantra is: “If professional developers are needed, we haven’t done our job.” With that in mind, Nintex has customers that have scaled to tens of thousands of applications deployed, the vast majority of which were developed by businesspeople without formal coding skills. Nintex offers particularly deep integration with SharePoint (where it cut its teeth). In 2015, it acquired Drawloop and added Salesforce support, where it provides excellent document assembly as well as strong embedded custom workflow capabilities. However, Nintex has also effectively re-platformed as a standalone, independent cloud offering. Its recent acquisition of Promapp for process mapping ups its game for addressing complex process re-engineering opportunities.

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Don't expect Nintex to take on the most complex process applications — the traditional stronghold of the traditional BPM crowd. To cover the end-to-end waterfront of complex-to-basic process applications, a customer would likely pair Nintex with a high-end vendor like Appian, IBM, or Pegasystems.

- › **AgilePoint focuses on an architecture to drive business agility.** AgilePoint provides very strong tools for business developers while enabling professional developers to build more complex applications. AgilePoint offers a particular focus on UX for both web and mobile, as well as strong data-management capabilities. The breadth of services for process automation is wide, covering nearly every functional capability that the majority of use cases requires. Customers mentioned development speed across a wide array of use cases and cost as primary areas of satisfaction with AgilePoint. While it has broad geographic and vertical coverage for a small company, AgilePoint has particularly thrived in manufacturing.

While AgilePoint is well positioned for handling digital process automation for wide workloads, it is less suited for very high-volume, high-transaction system-to-system environments. Additionally, while AgilePoint's feature set positions it for strong growth, the firm's ultimate strategy with regard to horizontal, vertical, and geographic focus is still emerging.

Strong Performers

- › **bpm'online excels in CRM-centric processes, less so as a general-purpose platform.** While bpm'online offers strong platform capabilities, its entry point into organizations tends to be through its packaged customer relationship management (CRM) application capabilities. The market has embraced the pattern of "buy, then build" customizations and net-new applications. It is particularly powerful for CRM vendors since customer data and processes are at the center of many critical initiatives in the age of the customer. bpm'online excels in process and case management capabilities (both critical in CRM) and offers strong tools for professional developers to build software quickly.

bpm'online is most relevant as a DPA solution when used in CRM; it has demonstrated less success as a straight development platform. While the offering is strong overall, support for some areas like mobile development and RPA isn't as robust as others in the category.

- › **AXON Ivy offers a powerful dev environment as it expands beyond Europe.** Originally a spinoff from a Swiss University, AXON Ivy now operates as an independent entity within the AXON Active Group, a global conglomerate that helps customers with digital transformation. An independent company exclusively focused on software solutions, with particular success across a wide range of industries in Central Europe, AXON Ivy is now expanding globally with prepackaged industry solutions as well as a strong business platform that allows customers from any industry to create tailored, low-code, process-oriented applications. The combination allows professional developers to work in a familiar and powerful environment backed by prepackaged offerings across a wide array of use cases like accounts payable and field service automation.

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AXON Ivy has historically focused on Central Europe, where its partner network and knowledge of local business and regulatory environments are extremely relevant. Recently however, AXON Ivy has demonstrated a desire to expand to more geographic markets, investing in global offices with a heavy emphasis on partner recruitment, particularly in North America. Much of its solution focus and industry expertise will be directly applicable to that expansion.

- › **Newgen brings strong capabilities to the most complex process environments.** Newgen Software comes with a long background in process automation and offers extremely strong capabilities across all of the critical areas required to succeed there. Process orchestration, from structured to ad hoc case management, is underpinned with excellent document management support. With these capabilities, Newgen offers functionality to support most process automation use cases. Among the vendors in this DPA wide assessment, Newgen is best suited to handle the most complex, deep process workloads.

While Newgen thrives in complex process and content environments, it could be overkill for organizations that need to focus on more basic processes and low-code development. However, if some of the workloads do require a powerful process solution, an investment in Newgen is well suited to expand to a wide array of processes.

- › **K2 continues its shift from deep processes to wide.** With last year's release of K2 Five and K2 Cloud, the company began shifting its focus on the emerging opportunity for DPA wide deployments. With that, K2 placed a great deal of emphasis on enabling business developers with tools like a new, highly intuitive process-mapping capability, preconfigured templates to jump-start development, and a focus on declarative development tools that allow business developers to do more than previous K2 versions. All of this is layered atop K2's SmartObjects, which allow easy access to external data and functionality. K2 also takes the stance that data should always reside in native systems of record and be brought into the process in real time as needed. This fundamental architecture drives a strong data governance model that lets business developers access core data without risk of corruption.

The shift from traditional BPM vendor to a DPA wide vendor with a focus on cloud deployments isn't trivial. The titanic shift from the old code base to the new K2 Five and Cloud offerings should be the last major release, as the new architecture now facilitates rapid, iterative releases.

Contenders

- › **FlowForma offers a powerful process/low-code platform — in SharePoint only.** FlowForma is unique among offerings in this analysis in that it runs natively on SharePoint and cannot deploy without it. This means that FlowForma takes advantage of SharePoint's underlying capabilities including, but not limited to, document management and search. On top of this, FlowForma layers a low-code development environment and process-orchestration engine. The result is a powerful platform for quickly building and deploying workflow applications that meet a wide range of business needs while leveraging existing investments and standards. Customer references report

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that business developers can build applications very quickly, and many of those applications have been critical to addressing customer, employee, and patient needs.

FlowForma sits squarely in the DPA wide definition and isn't suitable for moving into more traditional deep workloads that have defined the traditional BPM. This is fine because it's not what FlowForma designed its products to do. But customers should bear in mind that leveraging the underlying capabilities of Microsoft SharePoint and Azure may be confining. For example, organizations that do not want to use SharePoint for document management or native Azure features for authentication, security certification, etc. won't find FlowForma a good fit.

- › **Ultimus combines low-code tools, process, and services for pro devs only.** Ultimus describes its approach as a software factory. It defines commonality between a large array of application types and leverages common development capabilities across areas like integration, form design, and mobile support. The approach has seen significant success in financial services and government, particularly in the Middle East. The tools focus primarily on professional developers who want to build apps more quickly than possible with traditional coding tools. Ultimus' strategy is to support its customers through professional services to help them get up to speed.

Ultimus' strength is with professional developers. If an organization plans to leverage businesspeople as developers, a market well served by some of the vendors in this evaluation, Ultimus is not a good fit. Ultimus also places less focus on emerging capabilities like broad-based RPA partnering.

- › **JobRouter suits users looking to build a new class of business applications.** Most DPA vendors focus on processes that integrate with and leverage existing core systems. JobRouter does that very well, but it also has had significant success in offering a custom alternative to packaged business applications. As a result, its architecture and strategy allow processes to reside entirely within the JobRouter environment with full support for data management, analytics and intelligence, and content and document management and archiving, allowing great agility and straightforward customization. JobRouter touts itself, with proof points, as an alternative to traditional enterprise resource management systems like SAP and Oracle. For small-to-midsize companies that want greater flexibility than mainstream packaged applications can offer, or for those looking to leverage a full-featured platform to extend existing business application investments, JobRouter offers a compelling alternative platform that comes with extensive capabilities to customize as needed.

JobRouter has lagged in noncore functionality like UX, including mobile, as well as emerging capabilities that customers might find too forward-leaning like artificial intelligence, but it has placed a strong focus on all of those over the last year and has a strong product road map.

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Challenger

- › **PMG expands beyond IT services catalog with a focus on process orchestration.** PMG's core business has previously been in IT services catalog. PMG built that offering on a robust platform that has extensive development and process capabilities, and numerous customers use it as a jumping-off point for developing a wide variety of custom applications. Its tools are very business-user-accessible and allow for rapid development with little upfront training. Customers have leveraged this to enable users to automate operational business processes that were previously manual and/or paper-based.

With a legacy in internal applications, PMG excels in driving operational efficiencies. It is less applicable in external-facing applications, particularly customer-facing ones. PMG lags in areas like UX and mobile support and is weak in some areas that serve the high end of process automation like digital decisioning.

Evaluation Overview

We evaluated vendors against 30 criteria, which we grouped into three high-level categories:

- › **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include user experience and mobile design capabilities, process and flow design, and support for advanced process capabilities like case management, digital decisioning, and RPA support.
- › **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated the criteria like the vendor's vision and strategy, commercial model, partnering model, and community support.
- › **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's revenue specific to DPA for wide deployments, revenue growth, and number of enterprise customers.

Vendor Inclusion Criteria

Forrester included 10 vendors in the assessment: AgilePoint, AXON Ivy, bpm'online, FlowForma, JobRouter, K2, Newgen Software, Nintex, PMG, and Ultimus. Each of these vendors has:

- › **Low-code and business-developer-friendly tools.** Included vendors have an offering that is business-developer-friendly and supports low-code features that can be used to create digital process applications.
- › **Strong process-modelling capabilities.** Selected vendors demonstrate strong process-modeling capabilities and the ability create and manage complex, long-running processes with support for adjacent process capabilities like RPA integration, case management, and digital decisioning.

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- › **Proven capacity for many apps at scale.** Each vendor must have a proven track record of deploying large numbers of apps at scale with its clients.
- › **Strong relevance to Forrester clients.** Vendors must be evident in Forrester client interactions like inquiries and consulting and advisory engagements.

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Supplemental Material

Online Resource

We publish all of our scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; access this tool by clicking the link the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs.

The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows [The Forrester Wave™ Methodology Guide](#) to evaluate participating vendors.

In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on a small number of inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials that they provided to us by December 14 and did not allow additional information after that point. We encourage readers to consider how the market and vendor offerings change over time.

In accordance with [The Forrester Wave™ Vendor Review Policy](#), Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy and publish their positioning along with participating vendors.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the [Integrity Policy](#) posted on our website.

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Endnotes

- ¹ We asked global developers whose firms have plans to adopt low-code development platforms about the types of apps they build with low-code tools: 33% said business process and workflow apps, second only to complete customer-facing apps at 35%. Source: Forrester Analytics Global Business Technographics® Developer Survey, 2018.
- ² In Forrester's Q1 2018 Digital Process Automation Survey, 49% of respondents answered that the primary goal for process initiatives will be digital transformation within two years. This is a stark contrast from two years ago, when cost reduction was the primary driver at 32%, and digital transformation was just 8%.

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