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The Forrester Wave™: Human-Centric BPM for Microsoft Platforms, Q4 2007

by Colin Teubner

for Information & Knowledge Management Professionals



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Global 360, Metastorm, And Ultimus Lead, But Upstarts Compete

by **Colin Teubner**

with Connie Moore and Jamie Barnett

EXECUTIVE SUMMARY

Forrester conducted lab-based evaluations of eight leading human-centric business process management (BPM) suite vendors across 150 criteria. We found a market in which Global 360, Metastorm, and Ultimus lead with well-rounded products that cover the entire process life cycle. Ascentn, Singularity, and K2 provide strong performing products, though these companies have room for improvement either in strategy or product. Other Strong Performers are Bluespring Software and W4, both small vendors with more noticeable product gaps — though their products will still be useful for many scenarios. As a corollary to our August 2007 evaluation of Java-oriented products, this evaluation focuses on Microsoft partner vendors that sell products oriented toward Windows and .NET. However, buyers — especially large ones — will want to consider vendors in both camps as they move toward strategic decisions on BPM.

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NOTES & RESOURCES

Forrester conducted lab-based product evaluations from August through October 2007 and interviewed eight vendor companies: Ascentn, Bluespring Software, K2, Global 360, Metastorm, Singularity, Ultimus, and W4. We interviewed two customer references for each vendor.

Related Research Documents

["The Forrester Wave™: Human-Centric BPM For Java Platforms, Q3 2007"](#)

August 2, 2007

["BPMS Revenue To Reach \\$6.3 Billion By 2011"](#)

July 30, 2007

["BPM Best Practices For Process Professionals"](#)

January 12, 2007

BPM SUITES VARY IN BUSINESS VERSUS IT FOCUS

It's official: BPM has moved beyond fad status and is rapidly becoming the next big thing, not just in IT but also in corporate management. As momentum grows, vendors from every imaginable market space have jumped on the bandwagon, attaching the BPM label to everything under the sun. Since everyone wants a piece of the market Forrester projects will grow to \$6.3 billion by 2011, whether a vendor is selling ERP, content management, simple workflow or business intelligence, you can expect to hear them talking about process.¹

Companies that embark on BPM initiatives need software tools to properly support their efforts. So how do technology buyers in this environment know where to look? How can a company choose between the likes of IBM and Intalio for BPM tooling? For starters, buyers who are starting from scratch should look at BPM suites — but Forrester has identified several categories of suites, including human-centric, integration-centric, and the subset of human-centric suites that focus only on document-intensive processes.

USE YOUR BUSINESS PROCESSES TO GUIDE YOU THROUGH THE BPM MAZE

The term “business process management” covers a lot of ground. Confusion reigns because the extremely broad BPMS software market offers products that vary widely in what they do, what they don't do and which business processes they target (see Figure 1). BPM is much like that old story about several blindfolded men trying to figure out what kind of animal an elephant is by touching it. The man touching the tail thinks the elephant is a rope-like animal, while the man feeling the leg thinks the elephant is treelike. BPM is like that — it's extremely confusing: Some BPM products feel like integration tools, others feel like rich human tools for participating in processes, and others feel a lot like document management systems or packaged business apps.

Because of this, enterprises must deeply understand the types and characteristics of their processes before evaluating BPMS products. Depending on the tool chosen to support the identified business processes, selected products could exceed expectations or fail miserably.

Although it is incredibly wordy and drives everyone nuts, dividing all business processes into human-intensive and system-intensive provides much greater clarity when trying to sort out the vendors and their diverse BPMS products. The two broad categories are:

- **Human-intensive processes.** These processes require people to get work done by relying on and interacting extensively with business applications, databases, documents, and other people (via collaboration tools). They require human intuition or judgment for decision-making during individual steps in the business process. Examples of human-centric processes include claims processing, loan approvals, accounts payable, mortgage origination, and customer service.
- **System-intensive processes.** These typically involve millions of transactions per day that are handled on a straight-through basis with minimal or no human touch and few exceptions.

Examples include trade reconciliations, supply chain management, and line provisioning in the telecommunications market. Integration-centric BPMS manages the interactions between packaged applications, custom applications, external applications, and occasionally, the people that use them.

Which BPMS Tool Is Right For Your Business Process?

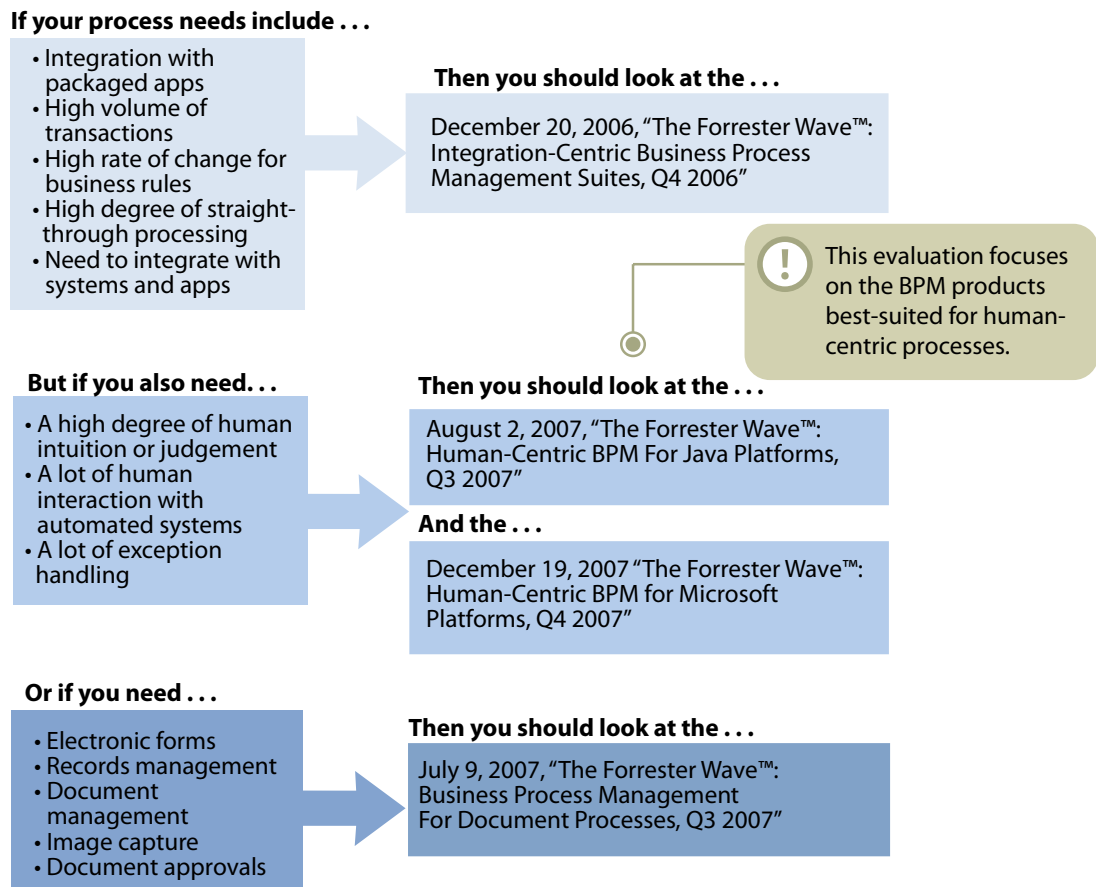
Before embarking on your BPMS journey, ask yourself and others many questions about your different types of business processes: Do your processes involve mainly people, documents, and decisions, or is most of the action behind the scenes and system-to-system? After deciding to automate a business process, use characteristics of the process to determine the best product category — integration-intensive, people-intensive, or document-intensive (see Figure 2):

- **People-intensive processes.** These involve a high level of interaction among individuals for routing, approving, and fulfilling requests such as customer service requests, travel requests, and purchase requests, or work submitted by insurance agents and adjusters. If your process has a high degree of human interaction, need for human intuition or judgment, and a high rate of exception handling, then the Forrester Wave™ evaluations of human-centric BPMS products can help narrow the vendor field.²
- **Decision-intensive processes.** These complex processes involve gathering information, automatic and manual scoring of customers or loans, and mission-critical decision-making. A rules engine is a must-have for this type of process, and the easier it is for decision-makers to get access to the information they need, the better. Insurance and financial services companies that have high-value processes with important decisions should make this process type their highest priority. However, there is not a true product category devoted to these processes; some of the products in our human-centric BPMS Forrester Wave focus on this area and are best suited for companies with a decision-intensive process landscape.
- **Document-intensive processes.** These processes require users to review documents for approval, enter data from those documents into a back-office system, and make decisions. Action is driven by information found in scanned images or electronic forms, or possibly electronic documents created in Microsoft Word or other tools. Examples of document-intensive processes include new-account opening, invoice processing, and litigation support — or industry-specific processes like medical records, mortgage origination, claims processing, or loan approval. If your processes have a strong need for image capture, forms processing, and document management, make this BPM category your highest priority.
- **System-intensive processes.** These business processes involve transactions among systems on a straight-through basis with minimal human involvement. A high volume of transactions, the need to integrate with other systems, and a high degree of straight-through processing with very limited human interaction puts you in this category.³

Figure 1 Four Types Of Business Processes

Types of business processes			
Integration-intensive	People-intensive	Decision-intensive	Document-intensive
Characteristics			
<ul style="list-style-type: none"> • Strong focus on automating processes that integrate systems and applications • Typically involves few exceptions and limited human participation • Can handle high transaction rates • Often used for externally focused processes linking two or more enterprises 	<p>Strong focus on automating people-intensive activities like servicing customers, operating call centers, managing sales operations, supporting field-based agents, routing internal requests by employee</p>	<ul style="list-style-type: none"> • Strong focus on processes that require employees to make mission-critical decisions using information and business rules • Processes in which the decision criteria and process rules change frequently 	<ul style="list-style-type: none"> • Strong focus on processes that involve extensive use of scanned images for back-office processes • Focus on processes that require people to use documents extensively (not just author documents)
Examples of processes			
<ul style="list-style-type: none"> • Order fulfillment • HIPAA transactions • Supply chain mgmt. • Any process requiring integration between applications, databases, or business partners 	<ul style="list-style-type: none"> • Order to cash • Employee onboarding • Claims processing (non-paper-based) • Handling exceptions from supply chain mgmt. 	<ul style="list-style-type: none"> • Mortgage loan origination • Underwriting • Retail inventory mgmt. • Sales promotions and rebates 	<ul style="list-style-type: none"> • Claims processing (paper-based) • Accounts payable • Contract mgmt. • Proposal mgmt. • SOX compliance and other compliance processes
Required features			
<ul style="list-style-type: none"> • Integration tools • Transaction mgmt. • Process modeling • Trading partner mgmt. • Monitoring and reporting • Embedded portal capability • App development environment • Life-cycle mgmt. • Comprehensive SOA capability 	<ul style="list-style-type: none"> • Task list/workflow portal • Strong UI development • Organization mgmt. • Native forms • Integration with packaged applications, particularly CRM and ERP 	<p>Business rules (internal or integration with third parties) or native analytics for business information (more than process analytics)</p>	<ul style="list-style-type: none"> • Robust, native support for document imaging, document mgmt., and records mgmt. • Task list/workflow portal • BPM sold separately from ECM application
Desired features			
<ul style="list-style-type: none"> • Simulation • Rules engine support 	<ul style="list-style-type: none"> • Integration with third-party portals • Native integration capabilities or integration with third-party integration products • Integration with third-party e-forms 	<p>Integration with BI tools for analyzing business data (not just process data)</p>	<ul style="list-style-type: none"> • Event mgmt. for changes to documents • Integration with third-party ECM products • Integration with desktop apps

Figure 2 Forrester's BPMS Wave Decision Tree



41982

Source: Forrester Research, Inc.

Platform Choice Adds Another Fork In The Road

Forrester's client inquiries about BPM suites nearly always start the same way: "We're a Microsoft shop and . . ." or "Our developers use Java and . . ." A combination of these strong platform preferences and the vast number of interesting vendors in the market led us to split this Forrester Wave into Java-oriented and Microsoft-oriented vendors. However, many buyers will want to look across both human-centric BPM vendor evaluations to pick the vendor that best fits their needs. If a vendor is Microsoft-oriented, that means:

- **Windows administration skills will be needed; Microsoft developers may be needed.** Unlike in the Java environment, some of these Microsoft partners produce environments that really do let non-coders build end-to-end, functional workflows. However, this usually means foregoing complex integrations to back-end systems (where developers familiar with the Microsoft environment will be a must).

- **Evaluating the BPM suites' ability to integrate to your other technology.** While nearly all the non-Microsoft-oriented vendors provide facilities for consuming .NET APIs and the like, integration capabilities vary more widely. This variation occurs at least in part because some vendors target the lower end of the market, where Microsoft-only environments are a reality. Several have no trouble consuming Java APIs directly, while others will require custom development. Look carefully at this Forrester Wave evaluation's results (by downloading the Excel-based vendor comparison tool) and grill the vendor about your needs.
- **Rich SharePoint and Office integration is the norm.** Still, there is plenty of differentiation here; the tools in this Forrester Wave vary on how well they can detect and respond to SharePoint events, and the richness of the SharePoint interfaces vary. For example, Global 360 can create custom toolbars for SharePoint, while K2 can deploy workflows so that they execute natively within the SharePoint Server. Bluespring has created a special, reduced-cost, SharePoint-only edition; meanwhile, W4 has dropped SharePoint 2007 integration due to lack of demand from its chiefly European customers. But several of the Java platform vendors have created rich integrations to SharePoint and Office, too — don't overlook them.

MICROSOFT'S BPM PARTNERS SPAN A WIDE RANGE OF NEEDS

The vendors that remain from Forrester's previous round of BPM product evaluations — Global 360, Metastorm, and Ultimus — are, perhaps not coincidentally, the three leaders in this evaluation. All three companies take a comprehensive approach to BPM, satisfying every part of the process life cycle — though some parts in more detail than others. The creation of a separate Microsoft-oriented Forrester Wave for human-centric BPMS made room to include more vendors in our evaluation. Unlike on the Java side, where large players like Software AG and IBM have entered the space, the Microsoft ecosystem continues to generate small, innovative entrants to compete with the larger pure plays at the top.

A pattern becomes apparent after having a chance to use these products: They are targeted at seriously different companies. Across the market for BPM technology, some buyers have a clear business strategy of which BPM is an important part; they plan to manage their business as a set of processes and to use BPM technology to help. Other buyers are squarely in the IT domain and want a new technology to help deliver whatever the business wants faster and more flexibly. This latter group is usually less concerned about business modeling, simulation, and other process analysis features. The vendors that target these IT-focused buyers leave out some of these end-user-oriented features, and likewise detailed analytics on process and business data are left to “the customer's BI tool of choice.”

That highlights the biggest difference between the Microsoft partners and the rest of the BPM market: The larger pure plays behave like lemmings, one following after the other — though most of them add truly innovative features, they're also sure to check off every feature box their competitors have. Meanwhile, the smaller vendors in this evaluation tend to find a niche and stick to it, foregoing expensive extras that not all buyers want and keeping costs down as a result.

WHEN SELECTING HUMAN-CENTRIC BPM SUITES, FOLLOW THE PROCESS LIFE CYCLE

Across BPMS technologies and implementations, no matter the industry or the process tackled, Forrester has consistently observed practitioners focusing on a narrow field of BPM value: process automation and efficiency. Vendors can point to many case studies with happy customers where the implementation involved simply modeling a process, improving it somewhat, automating manual work, and letting workflow handle the human interactions. Companies have been doing that since the 1980s on top of document imaging systems, and while BPM suites bring better development tools, standards-based integration, and execution flexibility to the picture, the majority of BPM customers miss out on even higher levels of BPM value.

For the executive who's bought in to the BPM religion and wants to transform his or her business using BPM methodologies and technologies, process automation is nearly beside the point. These types of BPM practitioners will need robust monitoring and management tools to gain visibility and insight into their running processes. Moreover, they will need advanced analysis and simulation tools to allow business analysis gurus to find ever more ways to optimize the process. Only with the "ah ha!" moments that come from holistic process monitoring — from a business point of view — will companies find the transformational promise of BPM becoming reality. Vital feature areas for advanced BPM include:

- **True human-centric support at runtime.** Be wary of IT-oriented vendors that promise support for "human components" in a process. Real human-centric processes are much more collaborative, dynamic, and ad hoc than what can be handled by an engine built for straight-through processing. Investigate in detail the vendor's support for collaboration at the time of process execution, the ability to pull in both structured and unstructured information to help people make decisions, and support for flexibility in the way processes are executed (while still keeping the process within the rules and auditing everything that happens).
- **Monitoring tools with process context that build themselves.** Business intelligence (BI) has long promised to provide insight into how our businesses are running based on data from traditional packaged applications. But two main problems get in the way of this promise. First, BI tools don't understand the process context inherent in the data they're analyzing. Instead, reporting is done in the context of a department, a business function, a customer, or a supplier. While these contexts can be useful, to truly change the way a business works, process is the most important backdrop against which to analyze your data. Second, traditional BI tools take too much effort to get at the data needed, and when the sources of data change, reports break and must be recreated by developers. Ideal process-contextual reporting tools can update the reports when a process model is updated, saving that extra step and allowing business users to see data based on the most up-to-date version of the process.
- **Management tools for people and processes.** Part of the BPM promise is the ability to actively manage work. Make sure your suite includes robust tools for reassigning work among workers and even among processes. Perhaps more importantly, the ability to change process models at

runtime is crucial. Look at the ways processes are deployed, and explore what happens when a process model needs to be changed — for all instances, for new instances only, or for just a subset of running instances (maybe even only a single instance).

- **Advanced analytics that use process data to drive process optimization.** Ideal process analysis tools don't just let users view results in process context. They include interactive, data-driven simulation features that let users understand what has happened in the past and see how changes to a process model will affect execution going forward. Make sure that data from process runtime can be imported into the simulation environment; this feature is most powerful if individual process instances from history can be run through the simulator, rather than just aggregate statistics being brought back.

HUMAN-CENTRIC BPM SUITES EVALUATION OVERVIEW

To assess the state of the human-centric BPM suites market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top human-centric BPM suite vendors.

Evaluation Criteria Cover The Process Life Cycle

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria (see Figure 3). We evaluated vendors against approximately 150 criteria, which we grouped into three high-level buckets:

- **Current offering.** We focused on design, development, execution, monitoring and management, and product architecture.
- **Strategy.** BPM vendors need strong stories around their ability to help customers succeed, through methodologies for process implementation and setting up centers of excellence. We also investigated vendors' product road maps, corporate strategy, and marketing activities.
- **Market presence.** We evaluated vendors' current installed bases and the size of their development, services, and support staff; we also included overall revenue and growth as an indicator of their ability to increase market presence.

Evaluated Vendors Partner With Microsoft, Vary On Process Life Cycle Support

Forrester included eight vendors in the assessment: Ascentn, Bluespring Software, K2, Global 360, Metastorm, Singularity, Ultimus, and W4. Each of these vendors has (see Figure 4):

- **Automated workflow with graphical design tools.** But unlike the non-Microsoft competition, not all these vendors have real business modeling or simulation features. When missing, these were usually on the vendors' near-term road maps.

- **A Microsoft-dependent platform.** All the vendors' server products run on Windows, and most use varying amounts of the .NET CLR. A few, including Global 360 and W4, have different versions of their products for other platforms. With the exception of W4, all the vendors provide good integration to Microsoft Office SharePoint Server.

Figure 3 Evaluation Criteria

CURRENT OFFERING	
Modeling	How sophisticated is the product's development environment for designing processes?
Process solution	What tools and features are provided to allow the creation and execution of an automated business process?
Process execution	How extensive are the product's features for automating business processes built by the modeling tools?
Monitoring and management	How sophisticated is the product's set of tools for monitoring and managing running processes?
Product architecture	How robust is the product's runtime integration environment in terms of high performance, reliability, and scalability? What measures have been taken to localize the product for multiple regions?
STRATEGY	
Product strategy	How strong is the vendor's product strategy?
Corporate strategy	How strong is the vendor's corporate strategy?
Process expertise	What is the vendor's expertise and skill in process methodology?
Product cost	What is the product's average price and how is the product licensed?
MARKET PRESENCE	
Installed base	How large is the vendor's installed base of customers for this product and for all products?
Revenue	What is the vendor's revenue during the past four quarters?
Revenue growth	What is the vendor's year-over-year revenue growth during the past four quarters?
Systems integrators	How many integrator partners have completed three or more deployments of any version of this product in the past 18 months?
Services	How strong are the vendor's implementation and training services?
Employees	How many engineers does the vendor have dedicated to this product? How big is the vendor's sales presence?
Technology partners	How strongly do technology partners support this product?

Source: Forrester Research, Inc.

Figure 4 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product evaluated	Product version evaluated	Version release date
Ascentn	AgilePoint BPMS	4.01	October 2007
Bluespring Software	BPM Suite SP2	4.5	September 2007
Global 360	Process360	9.5	September 2007
Global 360	Insight360	2.0	September 2007
K2	K2 blackpearl	1.0	August 2007
Metastorm	BPM Suite	7.5	April 2007
Singularity	Process Platform	3.5	July 2007
Ultimus	Adaptive BPM Suite	8.0	October 2007
W4	W4 BPM Suite	2006 R2	November 2007

Vendor qualification criteria

Automated workflow with graphical design tools. But unlike for the non-Microsoft competition, not all these vendors have real business modeling or simulation features. When missing, these were usually on the vendors' near-term road maps.

A Microsoft-dependent platform. All the vendors' server products run on Windows, and most use varying amounts of the .NET CLR. A few, including Global 360 and W4, have different versions of their products for other platforms. With the exception of W4, all the vendors provide good integration to Microsoft Office SharePoint Server.

Source: Forrester Research, Inc.

LEADERS COVER THE ENTIRE PROCESS LIFE CYCLE WHILE OTHERS TARGET NICHEs

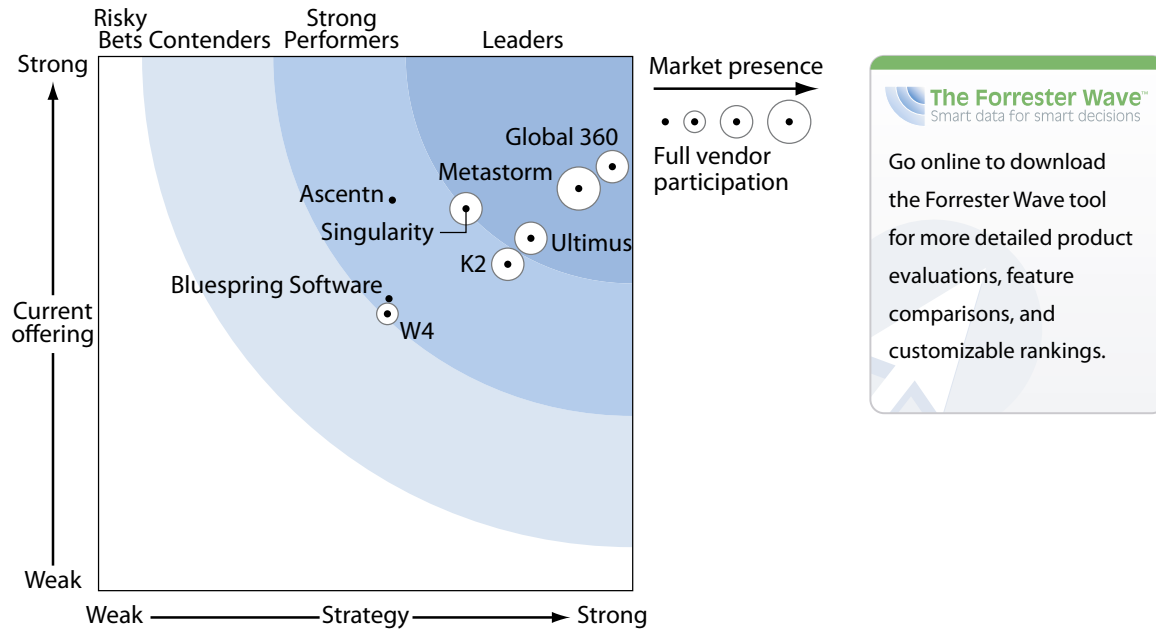
The evaluation uncovered a market in which (see Figure 5):

- **Global 360, Metastorm, and Ultimus lead with full life-cycle coverage.** All three of these vendors provide feature-complete BPM suites capable of supporting an entire business-driven process management life cycle. Most of the other vendors in this evaluation fell short in one or more areas vital to a truly business-driven BPM initiative: process modeling and simulation features, business rules management capabilities, or the analysis of process results. These vendors still have their own strengths and weaknesses; Global 360 is especially strong with process intelligence and document-centric processes, Metastorm has best-of-breed process analysis thanks to its Proforma acquisition, and Ultimus is well-rounded with excellent usability. Still, any of the three will be suitable for most human-centric processes.

- **Singularity focuses on methodology and quick results.** While this Northern Ireland-based vendor's technology platform is solid, Singularity differentiates more on its services methodology — focused on fast discovery and deployment of processes — and its vertical sales specializations in financial services, government, and telecom. The company, like Global 360, also provides case management capabilities, allowing support for processes that do not fit the traditional workflow paradigm.
- **Ascentn, Bluespring, and K2 provide great workflow at competitive cost.** These vendors keep R&D costs down by using as much Microsoft technology as technically possible, and as a result, they produce innovative tools. They take slightly different tacks, though: Ascentn is quite focused on its Visio-based design environment; K2 seeks to support various user constituencies with multiple design surfaces in Visio, Visual Studio, SharePoint, and K2's Office designer; Bluespring provides its own Windows-based design surface that encapsulates a huge range of functionality in graphical interfaces usable by anyone. All three provide good integration with technologies like SharePoint and InfoPath; K2 goes one step further by producing Windows Workflow schedules that integrate like native workflows within SharePoint but actually execute on top of K2's blackpearl server.
- **Metastorm and W4 add comprehensive integration features to solid workflow.** French vendor W4 embeds Israel-based Magic Software's tools in its own, and Magic likewise embeds W4; the mutual arrangement allows software purchased from either vendor to support comprehensive process management. For Metastorm's part, technology from its CommerceQuest acquisition has been well integrated into the Metastorm tools, providing integration to many kinds of technology from within process flows.

This evaluation of the human-centric business process management suites market is intended to be a starting point only. Readers are encouraged to view detailed product evaluations and adapt the criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

Figure 5 Forrester Wave™: Human-Centric BPM For Microsoft Platforms, Q4 '07



Source: Forrester Research, Inc.

Figure 5 Forrester Wave™: Human-Centric BPM For Microsoft Platforms, Q4 '07 (Cont.)

	Forrester's Weighting	Ascentn	Bluespring Software	Global 360	K2	Metastorm	Singularity	Ultimus	W4
CURRENT OFFERING	50%	3.65	2.68	3.95	3.05	3.76	3.55	3.30	2.58
Modeling	30%	2.89	1.53	3.98	2.20	4.22	3.49	3.66	1.66
Process solution	15%	3.84	2.83	3.22	3.15	3.12	3.90	3.34	3.43
Process execution	15%	3.75	3.74	4.04	2.93	3.87	2.16	3.76	2.86
Monitoring and management	30%	4.19	3.19	4.25	3.81	3.31	4.00	2.94	2.81
Product architecture	10%	3.90	2.80	3.90	3.30	4.55	3.90	2.60	2.90
STRATEGY	50%	2.75	2.73	4.80	3.83	4.50	3.43	4.03	2.70
Product strategy	50%	3.30	2.95	4.60	3.90	4.25	3.35	3.55	2.65
Corporate strategy	50%	2.20	2.50	5.00	3.75	4.75	3.50	4.50	2.75
Process expertise	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Product cost	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
MARKET PRESENCE	0%	1.74	0.83	3.72	3.30	4.12	3.11	3.08	2.05
Installed base	30%	0.90	0.60	3.50	3.00	4.00	3.30	3.00	1.90
Revenue	10%	0.00	0.00	5.00	3.00	4.00	3.00	2.00	2.00
Revenue growth	10%	5.00	4.00	2.00	3.00	3.00	2.00	0.00	3.00
Systems integrators	10%	3.00	1.00	4.00	5.00	4.00	3.00	5.00	2.00
Services	10%	1.80	0.00	4.20	3.00	4.60	3.20	4.60	1.00
Employees	20%	0.70	0.00	4.00	4.00	4.30	3.00	3.35	1.65
Technology partners	10%	3.50	1.50	3.50	2.00	5.00	4.00	3.50	3.50

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

Source: Forrester Research, Inc.

VENDOR PROFILES

Leaders: Global 360, Metastorm, And Ultimus Offer Comprehensive Products

- **Global 360.** This company has grown from its imaging and content management heritage to be a dedicated pure-play BPM vendor. The vendor has come a long way since our last evaluation: It has not only plugged feature gaps we found in 2005; it has also become a leading innovator in process intelligence. The company has brought to market one of the few products that can monitor processes in context as they execute across multiple systems — not just a BPM suite.⁴
- **Metastorm.** A long heritage and strong track record in BPM has given way to multiple acquisitions for this vendor. First CommerceQuest brought integration capabilities, and now Proforma is bringing Metastorm complete enterprise architecture (EA) and business process

analysis (BPA) modeling to front-end its automation tools. We saw the product only weeks after this acquisition and the company was already able to easily import Proforma models into the execution environment. Look for further integration to allow Metastorm to be one of the first to take advantage of the many synergies between EA modeling and BPM — scenarios like immediately understanding the business impact of a downed server combined with the ability to reroute work to other servers.⁵

- **Ultimus.** Another vendor with many years of experience, first in workflow and then in BPM, Ultimus is making a big impact with its brand-new V8 product. Ultimus' huge number of worldwide customers will be impressed by the revamped data model, the new SOA Server, and user interfaces in this latest version. Compared with the other leaders in BPM, Ultimus has traditionally been conservative in adding new features that may not sell, and it has instead long focused on something everyone wants: usable tools, collaboration, and giving power to business users to effect change.⁶

Strong Performers: Ascentn, Bluespring, K2, Singularity, And W4 Are Intriguing Upstarts

- **Ascentn.** Don't let the small size fool you; Ascentn has put quite an effort into making use of Microsoft-provided technology so that its R&D could go to better use. The company relies on Visio, SharePoint, and InfoPath to provide several user interfaces, and as a result, it has been able to create one of the best environments for managing and modifying running processes, making AgilePoint an appropriate name for its product. While business users can use Visio to assemble various pieces of back-end functionality, developers can use Visual Studio to create new functionality that is then available to users.⁷
- **Bluespring Software.** Bluespring is another very small vendor that takes a somewhat different tack by providing extensive prebuilt parts for tasks like manipulating Excel spreadsheets. This is arguably the only product in existence that would let a business user build a process to open an Excel spreadsheet from SharePoint, add data to it, and save it back. Bluespring nonetheless suffers from its size; it lacks simulation features in this version and also falls short on native rules management, though both of these features will be added in a new, extremely rich version 5.⁸
- **K2.** K2 brings complex capabilities to nontechnical users with its SmartFunctions (English-language rules), SmartObjects (a data integration layer that can hide multiple data sources and complex methods behind simple objects), and a flexible design paradigm that allows users to modify processes from multiple environments, such as SharePoint, Visio, Visual Studio, or K2's own Microsoft Office-like designer. All these various surfaces and the ability to embed workflows into SharePoint make K2 the leading innovator toward a next-generation development model for BPM. The feature gaps we identified in this evaluation, mostly related to simulation and business rules, are on the company's near-term road map.⁹

- **Singularity.** The Northern Ireland-based vendor has excellent process modeling tools designed to be used by multiple people, with support for interactive whiteboarding; the vendor has put much effort into developing methodologies for rapid process discovery, and the results have borne financial fruit for its references. The product has a few shortcomings in integration features and lacks native business rules management, but both of these problems can be overcome through partnerships.¹⁰
- **W4.** This well-established French vendor has strong references and success stories, and its partnership with Magic Software for integration allows both vendors to thrive. Among these Microsoft-platform vendors, this is the least married to the Redmond software giant's products, and it shows. Lagging SharePoint adoption in the European market led W4 to drop SharePoint integration, which hurt it in the rankings.¹¹

SUPPLEMENTAL MATERIAL

Online Resource

The online version of Figure 5 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

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

- **Hands-on lab evaluations.** Vendors spent one day with a team of analysts who performed a hands-on evaluation of the product using a scenario-based testing methodology. We evaluated each product using the same scenario(s), creating a level playing field by evaluating every product on the same criteria.
- **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 readers are encouraged to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve.

ENDNOTES

- ¹ Forrester predicts the market will grow from approximately \$1.6 billion in 2006 to \$6.3 billion in 2011. Many trends are driving this rapid growth, from business improvement and optimization mandates to service-oriented architecture initiatives. See the July 30, 2007, “[BPMS Revenue to Reach \\$6.3 Billion By 2011](#)” report.
- ² Prior to this evaluation, we ran 12 Java-oriented vendors through their paces. See the August 2, 2007, “[The Forrester Wave™: Human-Centric BPM for Java Platforms, Q3 2007](#)” report.
- ³ Forrester recently published a Forrester Wave™ evaluation of the integration-centric BPMS market. See the December 20, 2006, “[The Forrester Wave™: Integration-Centric Business Process Management Suites, Q4 2006](#)” report.
- ⁴ View the vendor summary for more detailed analysis on how Global 360 fared in this evaluation. See the December 19, 2007, “[Global 360 Leads With Process Intelligence For Human-Centric BPMS](#)” report.
- ⁵ View the vendor summary for more detailed analysis on how Metastorm fared in this evaluation. See the December 19, 2007, “[Metastorm Adds Process Analysis To Its Leading BPM Suite](#)” report.
- ⁶ View the vendor summary for more detailed analysis on how Ultimus fared in this evaluation. See the December 19, 2007, “[Ultimus Leads Human-Centric BPMS With Top-Notch Usability](#)” report.
- ⁷ View the vendor summary for more detailed analysis on how Ascentn fared in this evaluation. See the December 19, 2007, “[Ascentn Emerges And Is A Strong Performer In The Human-Centric BPMS Market](#)” report.
- ⁸ View the vendor summary for more detailed analysis on how Bluespring Software fared in this evaluation. See the December 19, 2007, “[Bluespring Lets Power Users, Not Developers, Build Strong Workflows](#)” report.
- ⁹ View the vendor summary for more detailed analysis on how K2 fared in this evaluation. See the December 19, 2007, “[K2 Brings Advanced Development To Human-Centric BPM Suites](#)” report.
- ¹⁰ View the vendor summary for more detailed analysis on how Singularity fared in this evaluation. See the December 19, 2007, “[Singularity Discovers Processes Rapidly With A Strong-Performing Human-Centric BPMS](#)” report.
- ¹¹ View the vendor summary for more detailed analysis on how W4 fared in this evaluation. See the December 19, 2007, “[W4 Partners To Bring Integration Capabilities To Its Strong-Performing Human-Centric BPMS](#)” report.

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