The Forrester Wave™: BPM Service Providers, Q4 2016
The 12 Providers That Matter Most And How They Stack Up
by Christopher Mines and Clay Richardson
November 22, 2016

Why Read This Report
In our 21-criteria evaluation of business process management (BPM) service providers, we identified the 12 most significant ones and researched, analyzed, and scored them. This report shows how each provider measures up and helps application development and delivery professionals make the right choice.

Key Takeaways
BP3, Wipro, VirtusaPolaris, Persistent Systems, And HCL Lead The Pack
Forrester’s research uncovered a market in which BP3, Wipro, VirtusaPolaris, Persistent Systems, and HCL lead the pack. Capgemini, Accenture, Princeton Blue, Cognizant, and TCS offer competitive options. Salient Process and ArchiTECH Solutions lag behind.

The Market Is Shifting As Business Process Leaders Invest In New Technologies
The BPM service provider market is changing as more business process leaders see next-generation automation technologies as a way to address their top challenges. Business process teams increasingly trust outside BPM service providers to act as strategic partners that can advise them on important decisions.

Digital Labs, Technology Enablement, And UX Design Skills Are Key Differentiators
As adoption of digital process automation grows, business process leaders will partner with service providers and consultants that can help close critical capability gaps. Vendors that can provide digital labs, process automation, and user experience (UX) design skills position themselves to successfully deliver both rapid experimentation and large-scale deployments for their customers.
The Forrester Wave™: BPM Service Providers, Q4 2016
The 12 Providers That Matter Most And How They Stack Up

by Christopher Mines and Clay Richardson
with Rob Koplowitz and Claudia Tajima
November 22, 2016

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Forrester conducted service evaluations in September and October 2016 and interviewed 12 vendor companies: Accenture, ArchiTECH Solutions, BP3, Capgemini, Cognizant, HCL, Persistent Systems, Princeton Blue, Salient Process, TCS, VirtusaPolaris, and Wipro.

Related Research Documents

Brief: Introducing The New Breed Of Digital BPM Consultants
How To Succeed At Process Automation In A Digital World
The New Discipline Of Digital Business Automation
BPM Service Providers Help You Take A Quantum Leap

Improving customer experience and accelerating digital transformation are the top drivers for business process improvement programs. Business leaders see that digital is disrupting the staid landscape of process improvement (see Figure 1). Yet these same process leaders are often poorly prepared to harness the forceful currents of new digital automation technologies, such as robotic automation, cognitive computing, and the internet of things. For example, one process leader we interviewed from the insurance industry lamented, “We now compete with a slew of startups that have cobbled together new automation technologies that we are just beginning to explore and play with.”

Business process leaders are replacing legacy business process management (BPM) programs with modern programs designed to unleash the potential of digital business automation. Forrester defines digital business automation as:

A discipline focused on driving competitiveness through continuous optimization of business processes across customers’ digital touchpoints.

The extension of BPM to digital business automation is a quantum leap for business process leaders. And traditional business process teams won’t be able to make this leap on their own. Forrester increasingly sees business leaders, and their allies in software development, turning to a new breed of consultant that is extending BPM to:

› **Scope and deliver experiments with new digital automation technologies.** Some digital automation technologies, such as cognitive computing and the internet of things, are so new that business process leaders face skepticism from executives who don’t see the business value of these technologies. Process leaders struggle to scope and deliver cost-effective, small-scale experiments that showcase the full range of potential that digital business automation could have for their organizations. BPM service providers help process leaders explore and experiment with new automation technologies without requiring large upfront investments in software or services. In short, consulting engagements lower the risk for assessing new automation technologies when you’re unsure how the technologies will apply to your company’s environment.

› **Build new design-thinking and customer experience skills.** The most difficult part of making the shift to digital automation is not the technology. Rather it is adopting new design and delivery techniques that demand a mindset different from traditional BPM approaches. Unfortunately, business process teams lack deep pockets to hire armies of new designers and developers already versed in design-thinking and customer experience practices. The best way to build the design and development skills needed to deliver digital automation is to work alongside BPM service providers that already have deep expertise around emerging best practices for digital design and implementation.

› **Reinvent business processes to tap into the power of cognitive computing.** Business process leaders are experimenting with autonomous business processes that engage customers and fulfill customer requests with very little human interaction. These autonomous processes include
a potent mix of cognitive intelligence, process automation, and analytics. These autonomous processes include a potent technology cocktail of cognitive intelligence, process automation, and analytics. For example, one managed care consortium is experimenting with cognitive processes to detect flu outbreaks based on hospital admissions, pharmacy purchases, and tweets posted in different metropolitan areas with flu-related keywords. The service uses a cognitive intelligence service to help make the predictions and then uses process automation to communicate with healthcare workers about the potential impact these conditions will have on their members.

**Figure 1** The Winds Of Change Are Driving Process Teams To Embrace Digital Business Automation

“**What was the primary focus of your process improvement efforts two years ago? What is it today? What will it be in two years’ time?**”

<table>
<thead>
<tr>
<th></th>
<th>Two years ago</th>
<th>Today</th>
<th>Two years ahead</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost reduction</td>
<td>30%</td>
<td>46%</td>
<td>50%</td>
</tr>
<tr>
<td>Productivity</td>
<td>22%</td>
<td>26%</td>
<td>31%</td>
</tr>
<tr>
<td>CX improvement</td>
<td>21%</td>
<td>13%</td>
<td>9%</td>
</tr>
<tr>
<td>Regulatory compliance</td>
<td>12%</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>Digital transformation</td>
<td>12%</td>
<td>2%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Note: Not all answers are shown.
Source: Forrester’s Q2 2016 Digital Business Automation Survey

**BPM Service Providers Reinvent Their Offerings To Support Digital Automation**

The shift to digital business automation is not a linear progression. For business process professionals, it’s an exponential leap, introducing greater complexity and unexpected risks and challenges along the way. Business process leaders turn to BPM consulting partners to help them navigate the complexity and challenges of digital automation. But success for BPM service providers is being redefined, requiring a blend of expertise that goes beyond what traditional BPM consulting practices offer. The new breed of BPM consultants:
 › **Embeds UX designers in client engagements.** BPM consultants place a premium on process modeling, process analysis, and process design. However, with digital business automation, the process model is no longer the center of the universe (see Figure 2). BPM service providers have responded to this shift in focus by hiring and embedding increasing numbers of UX designers who can help design better user interfaces that put customers and employees at the center of business processes. Some consultancies have gone as far as acquiring UX design firms to quickly staff up to handle client demand for UX design as a key element for digital automation. For example, in 2015 Wipro acquired the award-winning strategic design firm Designit. This acquisition provided Wipro with an instant infusion of top design talent to help extend its BPM consulting engagements.

 › **Facilitates experimentation through design studios and labs.** Business process leaders are reluctant to experiment with cutting-edge digital automation technologies due to the potential disruption these technologies can introduce into day-to-day operations. For example, one enterprise architect we interviewed was concerned with traceability and governance around new robots that used artificial intelligence to engage with customers. The architect wondered aloud, “What is our liability if the robot provides wrong instructions based on what it learned using artificial intelligence?” Digital business consultants help business process leaders overcome the risk of experimenting with new automation technologies by providing physical labs and design studios that offer safe spaces to evaluate and run small-scale experiments.

 › **Merges customer experience and process improvement methodologies.** Business process leaders continue to embrace Lean and Six Sigma as the most widely adopted process improvement methodologies. However, both of these methodologies have roots in manufacturing and fail to prioritize process improvements that impact the overall customer experience. BPM service providers are overhauling their legacy process improvement methodologies to infuse innovative approaches that link customer journey mapping and empathy models with business process analysis. For example, at Persistent Systems, the digital automation team developed an innovative methodology called Software 4.0 that combines design-centered practices with continuous automation.
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FIGURE 2 Data Science, Design Thinking, And Experimentation Are Critical Practices For Digital Automation

“How do you plan to change or expand your use of these process improvement methodologies?”

<table>
<thead>
<tr>
<th>Methodology</th>
<th>Decrease significantly</th>
<th>Decrease</th>
<th>Increase</th>
<th>Increase significantly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data science (i.e., big data)</td>
<td>2%</td>
<td>47%</td>
<td>33%</td>
<td>2%</td>
</tr>
<tr>
<td>Customer journey mapping</td>
<td>2%</td>
<td>53%</td>
<td>29%</td>
<td>2%</td>
</tr>
<tr>
<td>Design thinking</td>
<td>1%</td>
<td>50%</td>
<td>23%</td>
<td>1%</td>
</tr>
<tr>
<td>Agile development</td>
<td>4%</td>
<td>58%</td>
<td>50%</td>
<td>4%</td>
</tr>
<tr>
<td>Lean startup (i.e., experimentation)</td>
<td>2%</td>
<td>39%</td>
<td>16%</td>
<td>2%</td>
</tr>
<tr>
<td>Capability modeling</td>
<td>2%</td>
<td>47%</td>
<td>7%</td>
<td>2%</td>
</tr>
<tr>
<td>Lean/Six Sigma</td>
<td>2%</td>
<td>53%</td>
<td>37%</td>
<td>3%</td>
</tr>
<tr>
<td>Some combination of Waterfall and Agile</td>
<td>4%</td>
<td>7%</td>
<td>47%</td>
<td>3%</td>
</tr>
<tr>
<td>BPMN</td>
<td>2%</td>
<td>29%</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Waterfall</td>
<td>12%</td>
<td>33%</td>
<td>11%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Base: 215 business and technology decision-makers
Note: Not all responses are shown.
Source: Forrester’s Q2 2016 Digital Business Automation Survey

BPM Service Providers Evaluation Overview

To assess the state of the BPM service provider market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top consulting firms for BPM projects. After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 21 criteria, which we grouped into three high-level buckets:

› Current offering. In current offering, we assessed how each consultant stacked up in key service areas: breadth of BPM services, implementation and delivery models, and staffing and partnerships. We also took a look at how each consultant helped its clients experiment with BPM and the level of certifications it has on different BPM technologies.
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› **Strategy.** To evaluate strategy, we analyzed how consultants are positioning their service offerings to help educate the market on how to extend BPM for the digital era. We also evaluated each consultant’s vision for the BPM service provider market, and its level of visibility in the market as a thought leader.

› **Market presence.** To assess market presence, we looked at four items: the service provider’s track record with delivering large BPM projects, the number of client success stories publicly available, revenues for the most recent fiscal year, and overall revenue growth for its BPM services.

**Evaluated Vendors And Inclusion Criteria**

Forrester included 12 vendors in the assessment: Accenture, ArchiTECH Solutions, BP3, Capgemini, Cognizant, HCL, Persistent Systems, Princeton Blue, Salient Process, TCS, VirtusaPolaris, and Wipro. Each of these companies has (see Figure 3):

› A dedicated business process consulting practice focused on tech implementation. We included only service providers that maintain a dedicated consulting practice that primarily focuses on implementing widely adopted business process software platforms.

› Packaged horizontal and vertical process solutions. In addition to the consulting practice requirement, we included only vendors that offer horizontal and/or vertical packaged solutions that sit on top of existing process automation platforms.

› Capabilities to help clients take advantage of new digital automation opportunities. As part of our screening process, we evaluated each service provider’s focus on supporting new process automation technologies, such as cognitive intelligence services, robotic process automation, and the internet of things.

› Relevance to large enterprises with $1 billion or more in revenue. Forrester clients are predominantly large enterprises with $1 billion or more in revenue. For this evaluation, we included consultants that expect to generate over $10 million for 2016. We also required vendors to have consulting resources available in at least two geographic regions in order to support large global enterprises.
## FIGURE 3 Evaluated Vendors: Vendor Information And Inclusion Criteria

### Vendors

<table>
<thead>
<tr>
<th>Vendor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accenture</td>
</tr>
<tr>
<td>ArchITECH Solutions</td>
</tr>
<tr>
<td>BP3</td>
</tr>
<tr>
<td>Capgemini</td>
</tr>
<tr>
<td>Cognizant</td>
</tr>
<tr>
<td>HCL</td>
</tr>
<tr>
<td>Persistent Systems</td>
</tr>
<tr>
<td>Princeton Blue</td>
</tr>
<tr>
<td>Salient Process</td>
</tr>
<tr>
<td>TCS</td>
</tr>
<tr>
<td>VirtusaPolaris</td>
</tr>
<tr>
<td>Wipro</td>
</tr>
</tbody>
</table>

### Vendor inclusion criteria

<table>
<thead>
<tr>
<th>Evaluated vendors:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Maintain a dedicated BPM consulting practice, with the primary focus on implementing widely used BPM software platforms.</td>
</tr>
<tr>
<td>• Offer consulting capabilities that include process analysis, process automation, process design, technical architecture, and business/digital transformation.</td>
</tr>
<tr>
<td>• Provide packaged horizontal and vertical solutions that sit on top of existing BPM software platforms. Packaged offerings are product managed and are available for purchase by prospective customers and existing customers.</td>
</tr>
<tr>
<td>• Expect to generate over $10 million in revenue for 2016, with 70% of revenue coming from billable consulting services.</td>
</tr>
<tr>
<td>• Have consulting resources available (i.e., on the ground) in at least two global geographic regions.</td>
</tr>
</tbody>
</table>
Vendor Profiles

This evaluation of the market for BPM service providers is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool (see Figure 4).
FIGURE 4 The Forrester Wave™: BPM Service Providers, Q4 ’16 (Cont.)

<table>
<thead>
<tr>
<th>Current offering</th>
<th>Forrester’s weighting</th>
<th>Accenture</th>
<th>ArchiTECH Solutions</th>
<th>BP3</th>
<th>Capgemini</th>
<th>Cognizant</th>
<th>HCL</th>
<th>Persistent Systems</th>
<th>Princeton Blue</th>
<th>Salient Process</th>
<th>TCS</th>
<th>VirtusaPolaris</th>
<th>Wipro</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breadth of services</td>
<td>50%</td>
<td>3.54</td>
<td>1.94</td>
<td>4.18</td>
<td>3.54</td>
<td>3.35</td>
<td>4.17</td>
<td>3.83</td>
<td>3.08</td>
<td>2.22</td>
<td>3.59</td>
<td>4.27</td>
<td>4.36</td>
</tr>
<tr>
<td>Implementation and delivery models</td>
<td>30%</td>
<td>3.40</td>
<td>1.00</td>
<td>4.20</td>
<td>2.60</td>
<td>3.00</td>
<td>3.80</td>
<td>3.80</td>
<td>3.40</td>
<td>1.80</td>
<td>3.00</td>
<td>5.00</td>
<td>4.60</td>
</tr>
<tr>
<td>Staffing and partnerships</td>
<td>30%</td>
<td>3.60</td>
<td>1.60</td>
<td>3.85</td>
<td>4.40</td>
<td>2.70</td>
<td>4.10</td>
<td>4.70</td>
<td>3.00</td>
<td>3.20</td>
<td>3.50</td>
<td>3.90</td>
<td>5.00</td>
</tr>
</tbody>
</table>

| Strategy                         | 50%                   | 3.30      | 1.20                 | 4.70| 3.40      | 3.00     | 3.20| 3.70              | 3.50           | 2.70          | 2.50| 4.00          | 4.10  |
| Market strategy and vision       | 50%                   | 3.00      | 1.00                 | 5.00| 3.00      | 3.00     | 4.00| 3.00              | 2.00           | 2.00          | 2.00| 5.00          | 4.00  |
| Thought leadership               | 30%                   | 4.00      | 1.00                 | 4.00| 3.00      | 3.00     | 4.00| 3.00              | 3.00           | 3.00          | 3.00| 5.00          |       |
| Rates and pricing strategy       | 0%                    | 1.00      | 3.00                 | 3.00| 1.00      | 3.00     | 3.00| 3.00              | 3.00           | 3.00          | 4.00| 5.00          |       |
| Innovation road map              | 20%                   | 3.00      | 2.00                 | 5.00| 5.00      | 3.00     | 4.00| 4.00              | 4.00           | 4.00          | 3.00| 3.00          |       |

| Market presence                  | 0%                    | 3.45      | 2.25                 | 3.35| 3.05      | 4.40     | 3.40| 3.35              | 2.80           | 2.05          | 3.55| 3.95          | 4.15  |
| Large projects                   | 35%                   | 4.00      | 1.00                 | 3.00| 3.00      | 5.00     | 4.00| 3.00              | 4.00           | 1.00          | 3.00| 5.00          | 5.00  |
| Referenceable client success stories | 10%                 | 2.00      | 5.00                 | 3.00| 1.00      | 5.00     | 1.00| 3.00              | 3.00           | 3.00          | 3.00| 3.00          | 5.00  |
| Revenues from process consulting services | 25%             | 5.00      | 2.00                 | 2.00| 4.00      | 5.00     | 4.00| 2.00              | 2.00           | 2.00          | 4.00| 4.00          | 4.00  |
| Growth rate for process consulting services | 30%             | 2.00      | 3.00                 | 5.00| 3.00      | 3.00     | 5.00| 2.00              | 3.00           | 4.00          | 3.00| 3.00          | 3.00  |

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

Leaders: BP3, Wipro, VirtusaPolaris, Persistent Systems, And HCL

› BP3 helps clients push beyond boundaries for digital process innovation. BP3 was founded by executives formerly of Lombardi Software, a pure-play BPM suite vendor acquired by IBM in 2010. Leveraging its deep knowledge of the IBM BPM platform, BP3 established itself as one of IBM’s most innovative implementation partners. Over the past three years, BP3 introduced several
solution frameworks that have gained strong adoption in the IBM BPM community. Its most popular framework, Brazos, provides an environment for configuring responsive mobile and web user experiences. Although IBM is BP3’s flagship BPM software partner, the company also maintains partnerships with open source BPM vendors including Alfresco, Bonitasoft, and Camunda.

BP3’s primary weakness is a relatively small team of fewer than 150 business process consultants and developers, a limitation for clients that need to scale up large, multiyear business process transformation initiatives.

› **Wipro brings cutting-edge design practices to large-scale process transformation.** Wipro has invested heavily over the past three years to build out next-generation capabilities for helping clients undertake large-scale transformation for digital business automation. Wipro has an innovative methodology that combines design thinking and customer experience design concepts. The company applies this approach to help companies redesign mission-critical business processes to support new digital products and services. Wipro has built 22 experience design centers across the globe, including centers in London and New York City. In addition, Wipro has built out its own artificial intelligence offering, along with a large portfolio of vertical and horizontal solutions.

Although Wipro has established a strong methodology for transforming business processes for digital, its ratio of designers to developers is low relative to some of the other leading BPM service providers. Wipro’s greatest weakness is that less than 65% of its process consultants and developers are certified on any of the BPM software platforms the company implements.

› **VirtusaPolaris combines expertise and rapid delivery for financial services.** Virtusa completed its acquisition of Polaris, a global financial services software and consulting firm, in March 2016. Under the new banner of VirtusaPolaris, it has established a strong track record of delivering high-profile process transformation engagements for blue-chip clients across different verticals. The company now has a deep bench of more than 2,500 process consultants and developers with domain expertise in banking, financial services, insurance, and healthcare. The company’s vision for the future of digital business automation is backed up by a compelling road map for introducing new automation technologies within its portfolio of BPM consulting products and services.

While VirtusaPolaris maintains strategic partnerships with leading BPM software vendors, the company lacks strategic partnerships with any major open source BPM platforms. Additionally, VirtusaPolaris is weak on staffing for UX design roles, with less than 10% of its business process consultants focused on UX design.

› **Persistent Systems brings a refreshing mix of design and technology depth.** Founded in 1990, Persistent Systems is a well-established technology services provider. The company evolved over the past two decades to provide an innovative blend of deep technology expertise with customer experience design. Persistent Systems works with Appian as its primary strategic BPM software partner. Within the Appian ecosystem, Persistent has a strong reputation for delivering strategic advice while also helping its clients implement digital transformation. The
company has developed four packaged solutions that codify its implementation best practices and delivery approaches for BPM technology. These packaged solutions are publicly available to clients in the Appian app marketplace.

Although Persistent provides technical and design expertise, the company lacks deep skills in traditional process analysis and design frameworks, such as Lean and Six Sigma. The company also has only two strategic partnerships with leading BPM software vendors — just Appian and Salesforce.

› HCL works well in mixed BPM environments that require multiple vendors. HCL invested heavily over the past three years to completely retool its consulting workforce with design thinking and customer experience design skills. Through this retooling, the company is hoping to work more closely with clients on digital transformation projects that require consultants to redesign and re-engineer front-end applications and client experiences. One of HCL’s greatest strengths is the breadth and depth of its portfolio of strategic partnerships with BPM vendors. The company maintains relationships with 12 vendors that cover multiple segments and use cases in the BPM software market. These partnerships include enterprise platforms, such as Appian, IBM, and Pegasystems; low-code platform vendors, such as Intalio and K2; and open source vendors, such as Alfresco, Bonitasoft, and Red Hat.

HCL’s primary weakness is the limited number of published client success stories for digital business automation. Additionally, HCL does not offer packaged solutions or boot-camp offerings for working with customers in a co-deployment model. The company offers training and co-deployment on a customer-by-customer basis.

Strong Performers: capgemini, Accenture, Princeton Blue, Cognizant, And TCS

› Capgemini’s global studios help clients explore new digital automation use cases. Capgemini maintains a deep bench of BPM resources with more than 3,000 consultants, developers, and architects dedicated to supporting client BPM deployments and implementations. BPM resources are organized by industry domains, which allows Capgemini to continuously hone and refine its industry knowledge and quickly adapt to disruptive industry changes. Capgemini also maintains a global network of nine innovation labs and exchanges designed to help clients experiment with new digital automation technologies and concepts. These labs and exchanges provide clients with access to an ecosystem of business and technology partners, startups, academic institutions, and venture capital firms.

Capgemini’s strong vision for digital business automation is backed up by published case studies on customer projects implementing new digital automation technologies. Capgemini maintains strategic relationships with several major BPM vendors but lacks partnerships with any of the open source BPM vendors.
› **Accenture's arsenal of process artifacts helps clients jump-start process change.** Accenture is a long-standing thought leader in the BPM space. The company’s BPM consulting practice has published several books and regularly authors widely read articles and blog posts. Accenture offers a strong balance of traditional management consulting and technology implementations. The company maintains deep strategic partnerships with leading BPM vendors, including Appian, IBM, Pegasystems, and TIBCO. Additionally, Accenture has built an impressive repository of industry-specific process artifacts, including industry operating models, capability assessment models, client value trees, performance metrics, and technology architectures. The repository also includes over 85,000 process models that Accenture’s consultants can access to spark ideas and uncover best practices that they can use across different client projects.

Although client case studies and artifacts are accessible to internal consultants, Accenture offers a limited number of published case studies on client success for digital business automation.

› **Princeton Blue's tools help clients imagine new paths for digital automation.** Princeton Blue was founded in 2006 by a former webMethods executive (webMethods was acquired by Software AG in 2007). The company has forged strategic partnerships with leading BPM software vendors, including Appian, IBM, and Pegasystems. Princeton Blue’s greatest strength is its track record of building long-term strategic relationships with clients and helping its clients navigate disruptive trends in the BPM space. Princeton Blue is a high-profile thought leader in the BPM industry. Over the past three years, the company hosted an intimate BPM conference for its clients and other BPM practitioners to chart the future of process automation. Princeton Blue’s domain expertise covers healthcare and financial services, with clients across North America and Asia Pacific. The company also offers innovative solution frameworks, including a cognitive customer service framework, responsive web design framework, and business rules framework.

Princeton Blue lacks depth in traditional process improvement methodologies, such as Lean and Six Sigma. Additionally, Princeton Blue lacks a portfolio of published case studies for clients implementing large-scale process transformation using new digital automation tools.

› **Cognizant’s deep bench of BPM talent provides the scale for multiyear deployments.** Over the past 24 months, Cognizant has delivered eight large-scale, multimillion dollar business process transformation projects across different industries. It’s also impressive that Cognizant documented tangible process improvements for each of them. For example, Cognizant helped a large telecommunications company transform its customer complaint management process, resulting in a 67% reduction in time to complaint resolution. Cognizant maintains partnerships with leading BPM software vendors, including Appian, IBM, Oracle, Red Hat, Software AG, and TIBCO. As a global systems integrator, Cognizant maintains a deep roster of more than 3,500 business process consultants and developers that span different industries, including banking, financial services, healthcare, retail, and telecommunications.
Cognizant’s primary weakness is its lack of dedicated design labs and studios to help clients experiment with new digital business automation technologies. The company also lacks a strong thought leadership position in the BPM market, with limited published materials and publicly facing blogs that focus on BPM-specific topics.

› **TCS helps modernize legacy processes, with a focus on robotic automation.** With more than 9,000 business process consultants, TCS maintains one of the largest global BPM consulting and advisory practices. The company also maintains a large portfolio of strategic partnerships with leading BPM software vendors, including Appian, IBM, Pegasystems, Software AG, and Tibco. TCS combines its technical depth with traditional process analysis and design competencies around Lean and Six Sigma methodologies. Lately, the company has invested in building design-thinking skills to help clients experiment with new digital business automation technologies, such as robotic automation and the internet of things.

The focus of TCS’s strategy for digital automation emphasizes legacy modernization for systems of engagement, such as ERP and CRM applications. The company lacks a detailed approach for customers seeking to deploy new digital automation technologies beyond robotic process automation use cases.

**Contender: Salient Process**

› **Salient Process provides best-in-class services for BPM skills enablement.** Founded in 2011, Salient Process is just one of a handful of companies in the US to be recognized as an IBM BPM software accredited consulting firm. Salient Process’ greatest strength is a series of boot camp trainings and co-delivery packages where its consultants and developers work alongside client staff for project delivery. This approach helps clients quickly ramp up on BPM implementation and delivery best practices over a six- to eight-week period. Salient Process also offers several add-on software components that extend out-of-the-box features provided by IBM’s BPM software platform. IBM adopted one of these add-on components, a UX design framework, as a standard framework to be used with its product.

Salient Process has yet to work with clients on next-generation digital automation technologies and also does not offer any design studios to help clients experiment with these technologies. Salient maintains a lean staff of fewer than 25 process consultants and developers.

**Challenger: ArchiTECH Solutions**

› **ArchiTECH Solutions excels at BPM architecture and implementation.** ArchiTECH Solutions (ATS) was founded in 2004 by former solutions engineers who worked for Appian. The firm primarily serves clients in the US mid-Atlantic region, with an emphasis on the government and healthcare industries. Although ATS started out with a singular focus on development and implementation
services for the Appian platform, the consulting firm has expanded to support bpm’online and Pegasystems. ATS is one of the smaller BPM service providers we evaluated. However, for its size, ATS has built an impressive repository of client successes and published case studies.

ATS’s vision and road map target traditional BPM use cases that emphasize process modeling, business process design and analysis, and process integration. ATS is just beginning to help companies evaluate and implement cutting-edge digital automation technologies. The company also does not offer clients access to design labs and studios to experiment with new and emerging technologies.

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Supplemental Material

Online Resource

The online version of Figure 4 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:

› **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.

› **Executive strategy briefings.** We asked each vendor to brief us on its strategy to expand the overall business, address enterprise development needs, and address the full range of professionals involved in application delivery. We used findings from these briefings to validate details of each vendor’s capabilities.

› **Customer reference surveys.** To validate product and vendor qualifications, Forrester also conducted reference surveys with three of each vendor’s current customers.

The Forrester Wave Methodology

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

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

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

**Integrity Policy**

All of Forrester’s research, including Forrester Wave evaluations, is conducted according to our Integrity Policy. For more information, go to http://www.forrester.com/marketing/policies/integrity-policy.html.

**Endnotes**

1 To achieve digital dominance, progressive teams of business and technology leaders are redefining the scope and context of processes that underpin critical digital business capabilities — abandoning large-scale process transformation efforts in favor of targeted digital automation activities based on new technologies and practices. To learn more, see the Forrester report “The New Discipline Of Digital Business Automation.”

2 To learn more about digital business automation, see the Forrester report “The New Discipline Of Digital Business Automation.”

3 In their pursuit of fast delivery, many application development and delivery organizations have tried using Agile coaching in concert with new methodologies and tools. The results are often disappointing. New “immersive intervention” approaches go further by taking clients offsite to work on a project with seasoned pros using prescribed tools and processes. These programs produce results that the business can see. For more, see the Forrester report “Tackling The Cultural Challenges Of Agile And DevOps Transformations.”


5 The results of our annual state of enterprise architecture (EA) survey show that the set of imperatives Forrester categorizes under the age of the customer (i.e., customer experience, mobile, data-driven insights, and digital business models) are beginning to lap at the thresholds of EA programs. While most EA programs see these imperatives in their businesses, they still define themselves and operate as a technology management function with technology-management-focused goals. For more, see the Forrester report “The State Of EA 2015: Some Transformation, But Too Much Business-As-Usual.”

6 Source: “Software 4.0,” Persistent Systems (https://www.persistent.com/software-4-0/).

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