

Intelligent Automation Tools RadarView™ 2019

Extending to judgment-based,
business-critical functions

September 2019

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1

As enterprises are automating more business-critical processes, intelligent automation (IA) tool vendors have expanded their scope beyond IT and enterprise-centric automation to industry-specific automation.

2

Avasant's ongoing interactions with enterprise digital leaders reveal that organizations are working to find the right business case to scale intelligent automation adoption. They are looking to identify tool vendors that provide a progressive, business-centric approach to support their digital transformation journey.

3

The Intelligent Automation Tools RadarView 2019 Report provides information on key trends and best practices to help enterprises build a granular understanding of the Intelligent Automation ecosystem.

4

Avasant evaluated 25 vendors of Intelligent Automation tools through a rigorous methodology across key dimensions (product maturity, enterprise adaptability, and innovation roadmap) and recognized 14 that brought the most value to the market over the last 12 months.

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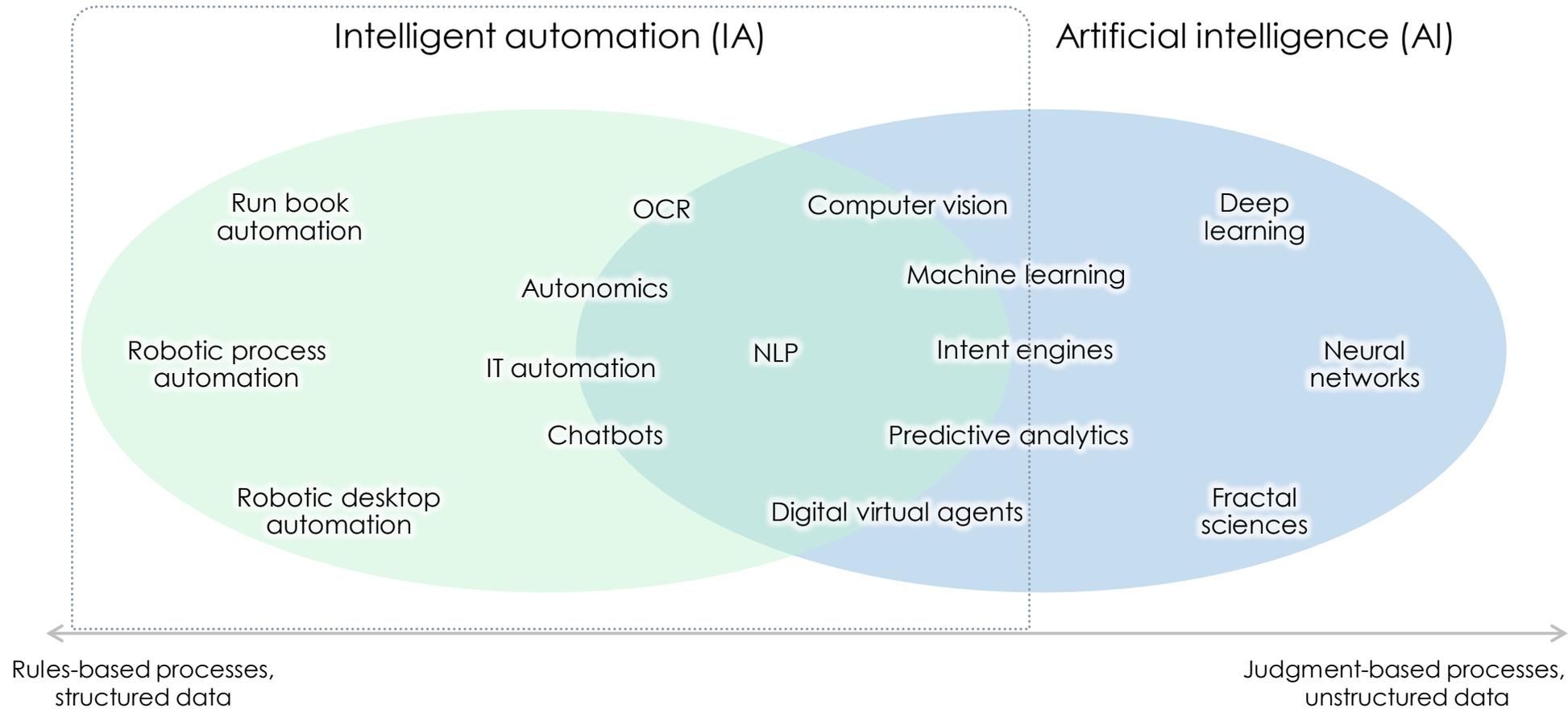
The report also highlights the key market trends and Avasant's view on the various intelligent automation tool vendors over the next 12 to 18 months.

AVASANT

Executive Summary

Defining intelligent automation

Intelligent automation is a combination of robotic process automation (RPA) with one or more AI technologies



Key intelligent automation tool trends shaping the market



IA tools are evolving to automate business-critical, cognitive and industry-specific functions

- Major IA tools now incorporate native and higher-level capabilities in ML, fractal science, cognitive vision, NLP and/or intent engines. Consequently, automation applications are expanding into core, more complex and judgment-intensive use cases such as risk profiling, fraud detection, real-time reconciliation, human response simulation, advanced recommendations, and proactive regulatory compliance.
- Industry-specific process automation solutions grew to over 20% of revenues of the major tool vendors. Leading sectors are Banking, Insurance and Telecom, along with considerable growth in Manufacturing, Retail & CPG, and Healthcare.

Heightened investor activity and valuations are propelling an enterprise land-grab race

- Over USD 1.7B of private equity capital has been invested in IA tool companies within the last 18 months at steep valuations. The resultant pressure to boost client acquisition metrics has led tool vendors to offer several innovative incentives (free POCs, extended trials and implementation) as well as outcome- and consumption-based pricing models (gain share, success based, per-bot, per-process and as-a-service).
- Tool vendors have accelerated development of SI channels and bot marketplaces. These marketplaces drive seamless trials of point solutions, leading to faster enterprise client adoption. The Big 3's bot-stores have 1200+ point solutions between them, across a range of applications such as file and text encryption and sales billing document.

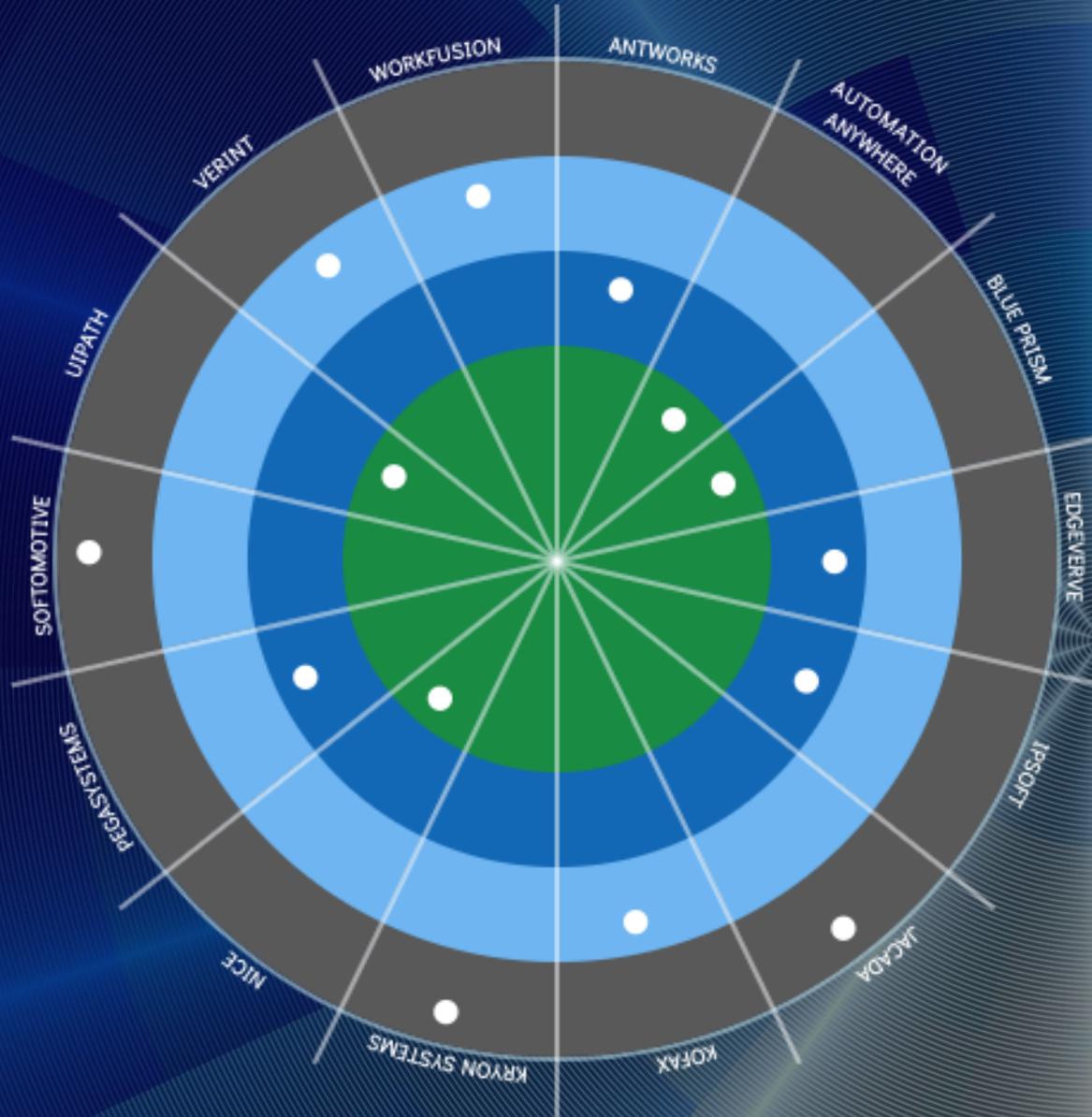
Focus on easier Bot development and seamless integration is driving enterprise scalability

- The IA ecosystem is maturing rapidly with IA tool vendors driving ease of bot deployment, use and management. This solves a key issue with enterprise scalability and expansion across multiple functional domains.
- There is a strong focus on addressing implementation bottlenecks and enhancing ROI with increased interoperability and microservices-based architecture enabling flexible deployments.
- The industrialization of automation includes embedding of process discovery, BPM, bot orchestration and system integration tools. Human labor in the bot implementation and run phases is reduced by leveraging standardized Bot architecture.

Rapid richening of functionality, ease of use, and innovation are enabling digital transformation

- IA Tool vendors are investing 25%-40% of their investment budget into enhancing functionalities and features of their products to prepare for the rapidly-evolving digital ecosystem. Accelerated release cycles and integrated solution stacks are driving faster adoption.
- Aggressive competition within the top-tier IA Tool vendors is resulting in rapid innovation cycles. Use of advanced machine vision, cognitive and NLP capabilities has minimized the first-mile/last-mile gaps. Now available are scalable and as-a-service deployment options (cloud based delivery); integration with AI, chatbot, IoT, data management platforms; and automation of automation (self-learning and bot creation).

Intelligent Automation Tools RadarView™ 2019



LEADERS

Automation Anywhere
NICE

Blue Prism
UiPath

INNOVATORS

AntWorks
IPsoft

EdgeVerve
Pegsystems

DISRUPTORS

Kofax
WorkFusion

Verint

CHALLENGERS

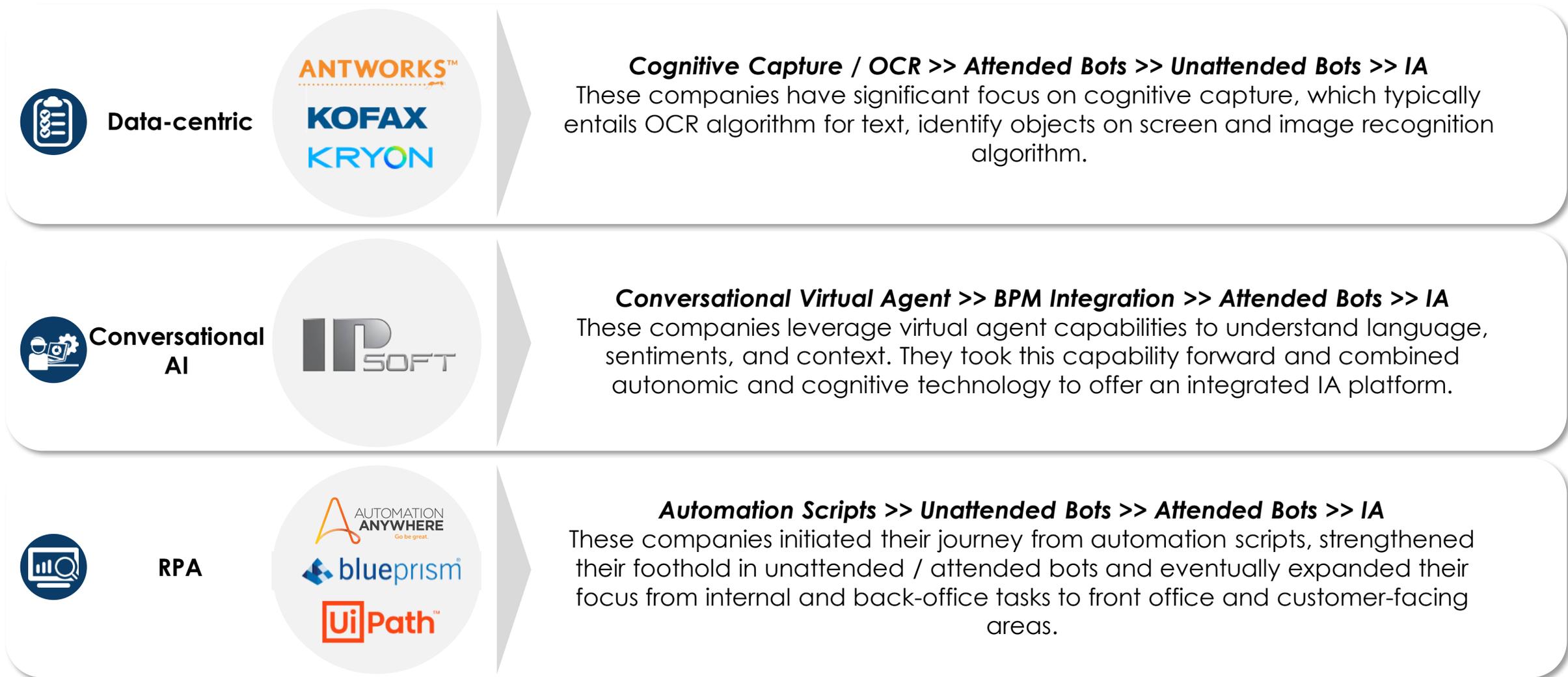
Jacada
Softomotive

Kryon Systems



Intelligent Automation Tools: The Rapidly Evolving Landscape

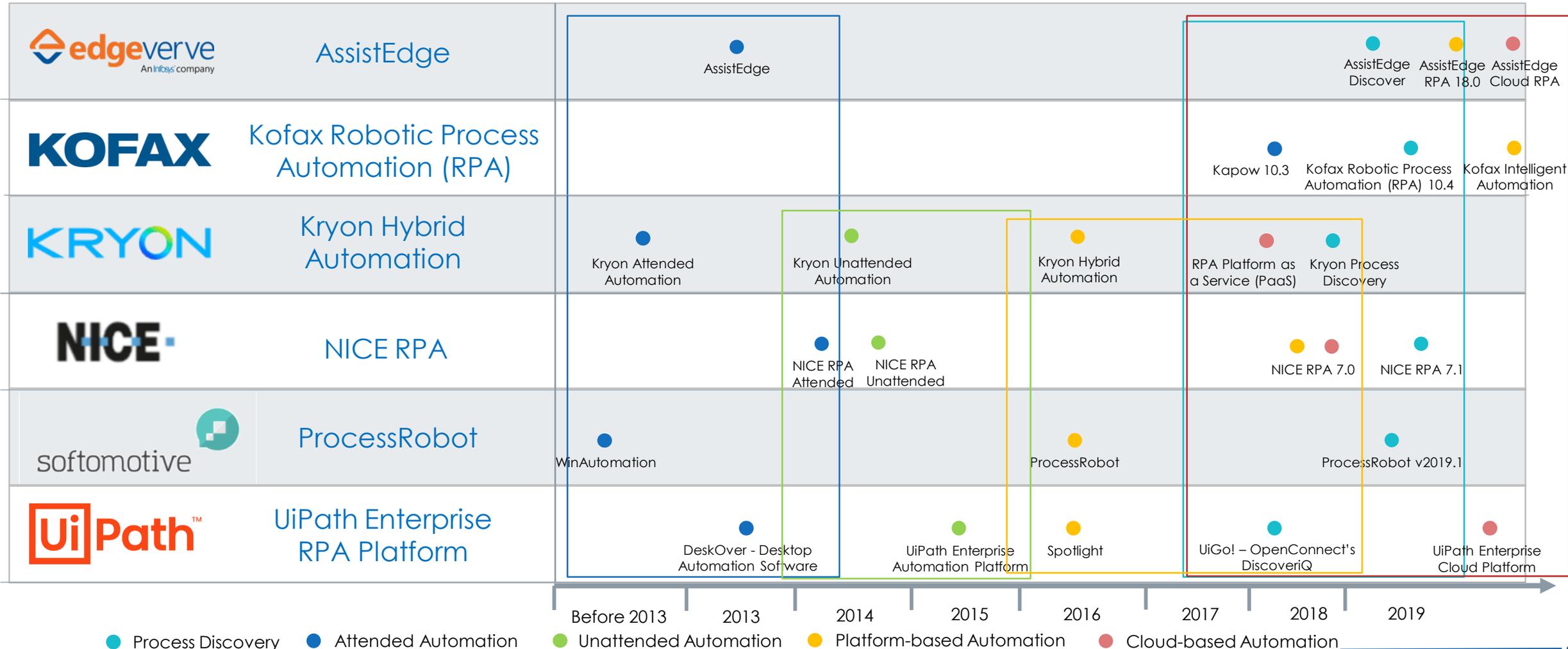
Vendors deploy variety of approaches to IA, including Data-centric, Conversational AI and RPA



Note: The above table illustrates some of the IA tool vendors

IA tool vendors have been introducing new features at the rapid pace to cover comprehensive automation

Tool vendors began with attended and unattended automation and brought process discovery late in the cycle to offer end-to-end automation suites.



Note: Platform-based automation includes both attended and unattended automation features
 Source: Company Announcements, Avasant Research

Increased AI capabilities in IA tools are opening up judgement-based, business-critical functions to automation

While Banking, Insurance and Telecom already have several live automation initiatives in industry-specific functions, other industries are also investing in evaluating specific use cases through pilots.

>20%
of overall IA tools revenue is already derived from industry-specific automation



Industry	Business Critical Functions	
Banking	<ul style="list-style-type: none"> • Default prediction • Credit limit extensions • Sanctions screening • Bank guarantee management 	<ul style="list-style-type: none"> • Account risk / fraud management • Processing closure of Letters of Credits basis expirations of records
Telecom	<ul style="list-style-type: none"> • Automated network planning • Reconciliation • Order management 	<ul style="list-style-type: none"> • Automated fraud identification and prevention • Trouble ticket optimization
Insurance	<ul style="list-style-type: none"> • Quote conversion probability prediction • Reinstatement of policies • Automated underwriting 	<ul style="list-style-type: none"> • Regulatory compliance • Query management • Automated claims management (intake, triaging, adjudication)
Healthcare and Life Sciences	<ul style="list-style-type: none"> • Automated health monitoring • Scheduling management • Revenue cycle management 	<ul style="list-style-type: none"> • Claims management • Regulatory compliance
Retail and CPG	<ul style="list-style-type: none"> • Sales forecasting • Automated accounts payable • Invoice reconciliation 	<ul style="list-style-type: none"> • Customer order segregation and delivery scheduling
Financial Services	<ul style="list-style-type: none"> • Account management and reconciliation 	<ul style="list-style-type: none"> • Automated portfolio restructuring
Logistics	<ul style="list-style-type: none"> • Order management 	<ul style="list-style-type: none"> • Tracking and auditing deliveries
Utilities and Resources	<ul style="list-style-type: none"> • Anomaly detection 	<ul style="list-style-type: none"> • Automated 'safety pack' creation

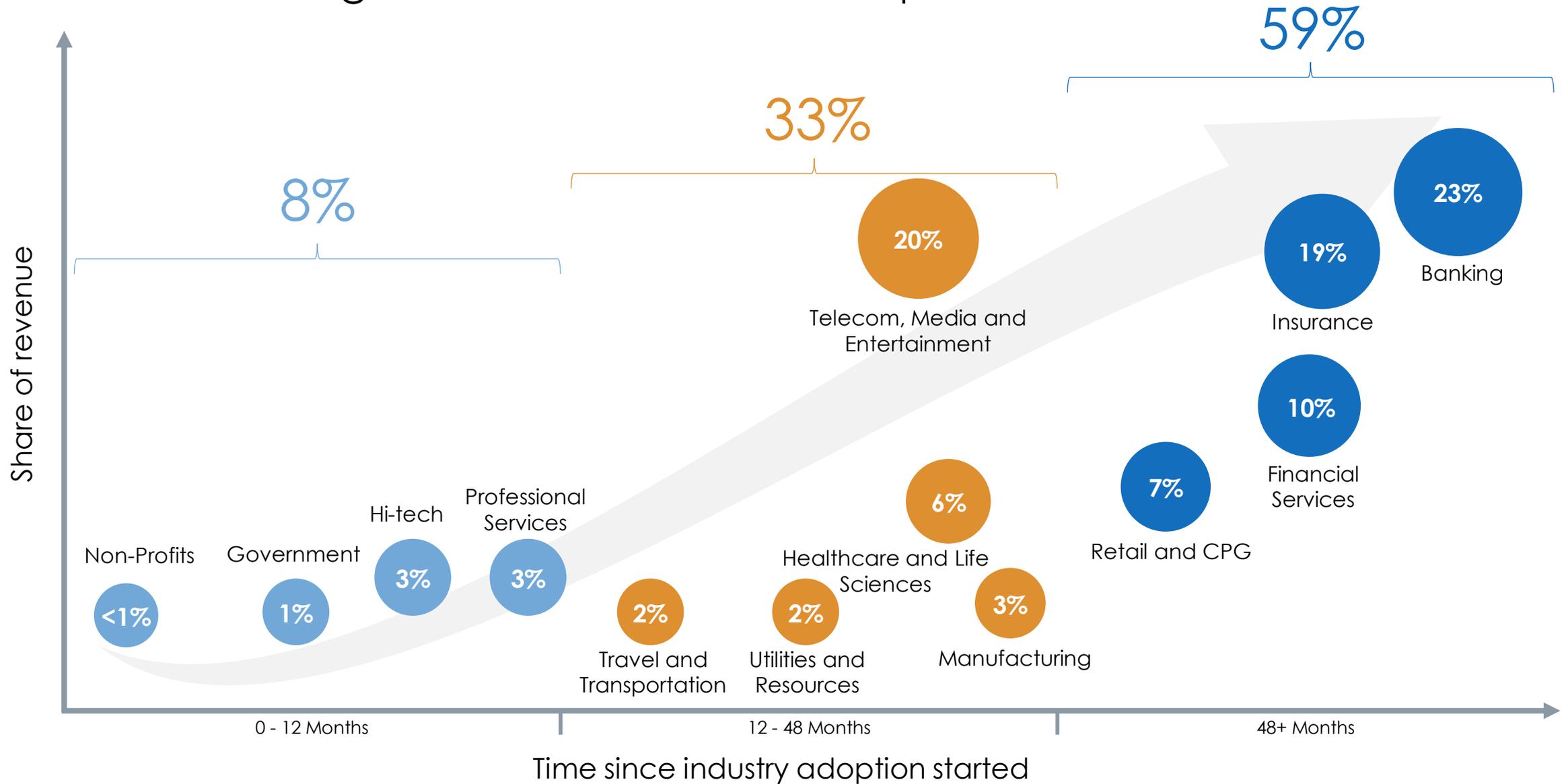
Darker color indicates higher propensity to automate business critical functions: ●●●●

All major tool vendors have enterprise-scale implementations in industry-specific functions



Organization	IA Tool Vendor	Industry-specific Function	Details
		Know-Your-Customer (KYC) document verification	City Union Bank implemented the AntWorks automation suite to accelerate its customer onboarding process. AntWorks's Cognitive Machine Reading capability was used to ingest unstructured data, contextualize it, and convert it into structured data, to help achieve KYC norms.
		Health claim settlement verification and processing	Max Healthcare automated its manual claims process by deploying UiPath Enterprise RPA Platform. This required extracting customer claim settlement information available in multiple formats (PDF, scanned images, email, etc.) from 28 different insurance vendors. Reduced TAT by 50%.
		'Safety pack' creation prior to large onsite jobs	Morrison Utility Services automated the creation of a "safety pack" (a document folder with schematics and blueprints), which requires accessing the systems of multiple asset owners. UiPath was able to tap into Morrison's SAP systems with no alteration to the host system and became self-sufficient within 6 months.
		SIM swap/number porting process	Telefonica O2 automated 15 core processes, including SIM swap and credit checks, using Blue Prism's RPA software. Instead of screen scrapping, Blue Prism fetched data through HTML, Java Access Bridge, and surface automation for Citrix. Achieved 3-year ROI of 650-800%.
		Fleet tracking and auditing	Redwood Logistics implemented Kofax RPA to automate tracking and auditing. It captured information around the location, progress, delivery milestones, and flagged anomalies to the accounts department. It helped triple the order volume while maintaining the cost levels.
		Risk assessment for loan applicants	The Co-operative Bank applied Blue Prism's operational agility software to automate the review of 2,500 high-risk accounts so as to process payments depending upon the account profile. This allowed redeploying 9 employees to customer-facing roles.

Banking continues to lead, while Telecom has shown rapid traction for intelligent automation in recent past



Several IA tool vendors have been able to raise significant capital in the last 18 months

~USD1.7B
Since January 2018

IA Vendor	Investor(s)	Amount (USD M)	Month/Period	Investment Type
	SBI Investment Co.	15	July 2018	Private equity; Series A
	Goldman Sachs, New Enterprise Associates	550	July and November 2018	Private equity; Series A and B
	Public	48	January 2018	New shares issuance
	Aquiline Technology Growth, OAK HC/FT, Vertex Ventures	40	February 2019	Private equity; Series C
	Grafton Capital	25	September 2018	Private equity; Series A
	Accel, CapitalG, Coatue, Sequoia, etc.	986	March 2018 – April 2019	Private equity; Series B,C, and D
	Alpha Intelligence Capital, Guardian, PNC Bank, Presbyterian	50	May 2018	Private equity; Series E

Consequently, IA tool vendors are entering a land-grab race for new enterprise customers



"With this investment, we will work together with SBI Group to bring end-to-end, AI-based enterprise RPA to the globe. Our goal is to empower **enterprises in emerging markets like Philippines, India, China, etc.** – by unleashing the limitless potential of machine learning and cognitive automation."

- Govind Sandhu, Co-founder and CFO, AntWorks



Automation Anywhere has established offices in **16 new locations since January 2018** including Amsterdam, Brazil, Frankfurt, Mexico, Miami, Middle East, Paris, Seoul, South Africa, Tokyo, Toronto, Warsaw and Washington, D.C. **This global expansion comes on the heels of one of the largest Series A and subsequent funding** in IA space.

- Press release, Automation Anywhere



"The proceeds raised via this placing will be deployed in pursuit of these opportunities, **with the bulk invested in front-end sales and marketing**, whilst a stronger balance sheet will help us commercially and reputationally."

- Alastair Bathgate, CEO, Blue Prism



Kryon intends to use the funds to continue development of its innovative technology and **penetration into new geographies by expanding its sales and marketing teams and opening additional offices around the globe.**

- Press release, Kryon Systems



"**With this injection of growth capital** and with London as its new base, Softomotive will **expand its global footprint** and accelerate the development of its product roadmap with a special emphasis on desktop automation and RPA for medium-sized enterprises."

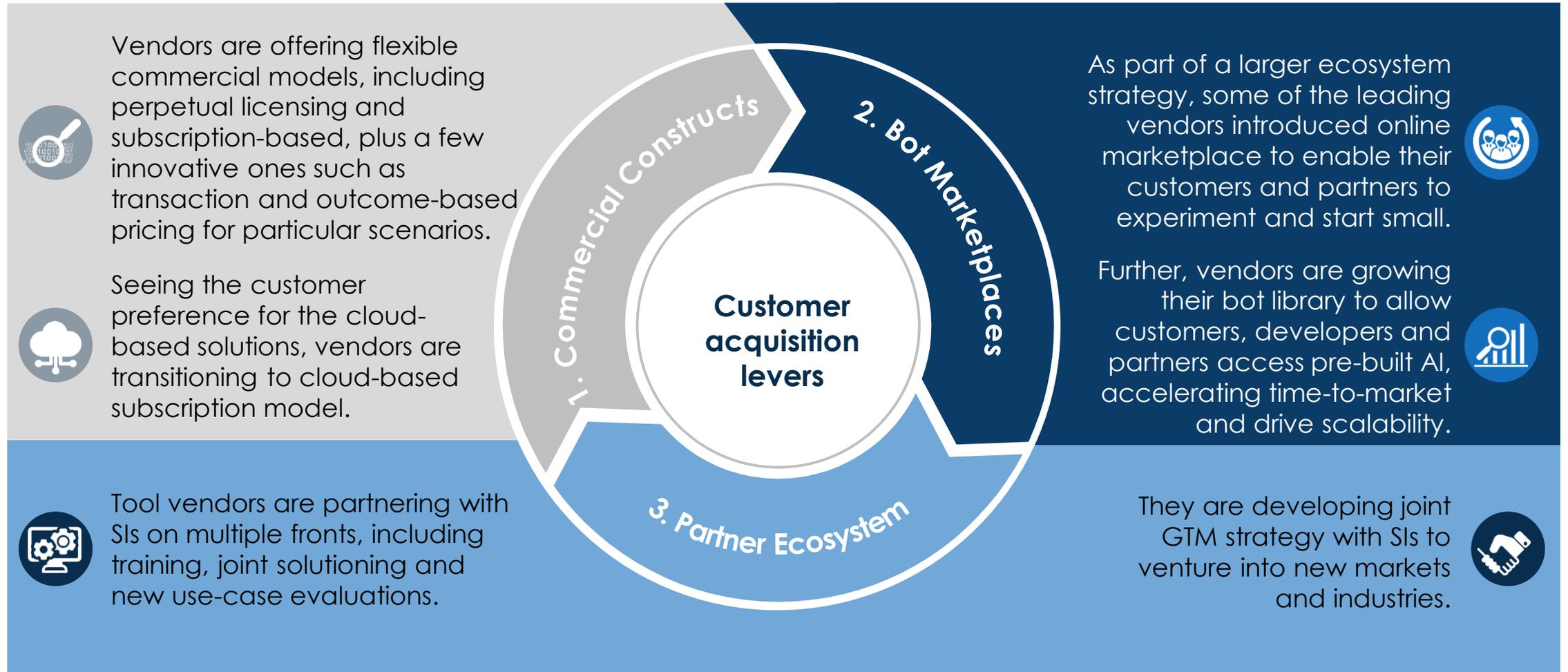
- Marios Stavropoulos, CEO and Co-Founder, Softomotive



UiPath intended to **use the Series D funding** to sustain its commitment to the customers' success and **continue exponential growth**. Since January 2018, UiPath has **established a number of new offices** across the globe including **Amsterdam, Austin, Austria, Cluj, Dubai, Houston, Iberia, Mumbai, Munich, Paris, Seoul, Singapore, Spain, Switzerland, Turkey, Washington D.C.** as a part of its expansion strategy.

- UiPath Blog, Newsroom

IA tool vendors are pulling on 3 key levers to accelerate new customer acquisition:



Bot pricing is still primarily consumption-based, with many of the smaller tool vendors offering incentives to drive adoption



Prevalent and emerging incentive programs

Traditional incentives

- Free POCs
- No-obligation pilots
- Discounts for integrated approach

Innovative incentives

- Free process discovery
- Revenue-linked discounts
- Free 1-year licensing for select modules
- Subsidized pilots
- Reengineering annual term (14 months instead of 12 months)

~90%

Of IA tool vendors have extensive incentive programs

~75%

Of deals have consumption-based commercial models

Commercial model adoption (by number of deals)

Outcome-based (success, gain share)

<1%

~5%

Consumption-based (per bot, per process, as-a-service)

66%

74%

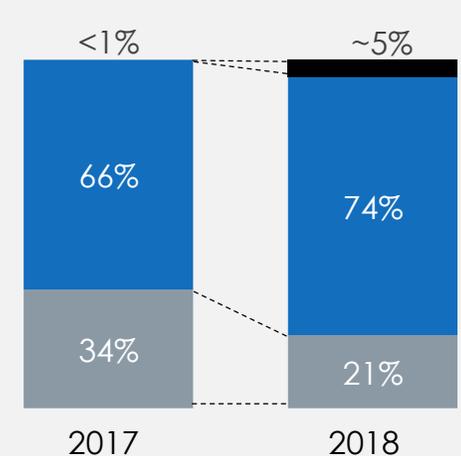
Subscription/licensing-based

34%

21%

2017

2018



Bot marketplaces, offering ready-to-use point-solutions, are driving trials and subsequent adoption of IA tools

1,200+
Ready-to-use bots
available across major
marketplaces

	 Automation ANYWHERE Bot Store	 UiGo!	 blueprism DX
Marketplace Launch	March 2018	October 2018	November 2018
IT processes	<ul style="list-style-type: none"> • Date and Time Management • Instance Utilization • Automate Login • Backup Database 	<ul style="list-style-type: none"> • File and Text Encryption • Create Password Protected Files • Get List of Files • Hide/Unhide File 	<ul style="list-style-type: none"> • Communications Analytics • Work Process Monitoring • Worker Process Monitoring
Enterprise processes	<ul style="list-style-type: none"> • Account Payable • Sales Billing Document • Create Invoices • Human Resources 	<ul style="list-style-type: none"> • Invoice Process • Accounts Payable • Sales Task Scheduler • Legal Processes and Scripts Execution 	<ul style="list-style-type: none"> • Vendor Onboarding • Sales Process Insights • Process Mining • Account Reconciliation
Industry processes	<ul style="list-style-type: none"> • Supply Chain Management • Utility • Inventory Management 	<ul style="list-style-type: none"> • Know Your Customer • Home Mortgage Accelerator for Banking • Healthcare-Claims Audit 	<ul style="list-style-type: none"> • Discover Claims

Notes:

1. Blue Prism promotes an enterprise platform than may be used for all purposes, including IT automation and industry-specific automations
2. Representative list of bots

Tool vendors are partnering with SIs on multiple fronts to scale the adoption of intelligent automation



Expand into new markets



- In June 2019, WorkFusion partnered with NEC Corporation to penetrate Japan market where the demand for automation and intelligence is rapidly growing.



- In April 2019, Automation Anywhere roped in ADT as a Gold-Tier partner for Russia and CIS countries.



Product training for SIs



- Blue Prism provides training to System Integrators, beyond just enterprises, to accelerate deployment of its solutions. It leverages its resources along with a number of training partners.



Joint Solutioning / Use case evaluation



- In April 2019, UiPath and Tech Mahindra launched their first joint offering, an end-to-end ready-to-use cognitive operations automation solution in the area of service desk operations.



- Combined RPA to provide workflow management, real-time decision making and data capture capabilities.

Also collaborating with technology providers to add data capturing, BPM and AI-led capabilities



Augmenting data capture capabilities



- In February 2019, Softomotive entered into a strategic partnership with CaptureFast to extract information from physical or digital documents via AI using machine print character recognition.



- In July 2019, Blue Prism added TabScanner to its Technology Alliance Program (TAP) to integrate the feature to convert images of receipts into editable data.



Integrating BPM for automated workflows



- Blue Prism partnered with Bizagi, a BPM provider, to deliver an intelligent automation solution to streamline enterprise operations.



- UiPath collaborated with Bonitasoft, a BPM provider, to offer an integrated platform to enable end-to-end IT and enterprise business process automation.



Enhance AI-led capabilities



- UiPath partnered with Google Cloud AI to integrate AI-led tasks such as signature comparison, parsing databases and service request management into full process automation



- Automation Anywhere partnered with DataRobot to access automated AI model development and deployment.

Tool vendors, even outside the Big 3, are making strong R&D investments to develop differentiated offerings

Several tool vendors are identifying niches to go deep into from a technology perspective. This can potentially lead to partnerships with other tool vendors with larger client bases.

25-40%
of an IA tool vendor's investment budget is planned for tool development

Organization	Patents*	Offering capability to be enhanced
 edgeverve <small>An Infosys company</small>	24	Machine learning (ML), image processing, predictive analytics, platform security, natural language processing (NLP), and text analytics
	5	Conversational intelligence and learning, emotional intelligence and response, and dialog management
	4	Systems and methods for supporting self-service and associated agent-assisted service call routing
	200+	RPA, cognitive capture, mobility, and financial process automation
	5	Computer vision – supporting automation for any application, and resilience to UI changes
	36	Determining user interface usage and modifying an application without manual coding

* Includes patents granted, bring processed and applied

Tool roadmaps are focused on ease of bot development and use, and offering enhancement through native AI



Bot Development

- To help reduce Bot development time.



- Focus on smarter bot development with an aspiration to reduce development time.
- It recently launched ANTstein SQUARE, a multitenancy solution that allows maximum bot utilization.



Process Discovery

- To develop a strategy and roadmap for enterprise automation.



- Recently introduced AssistEdge Discover to help enterprises prioritize processes for automation



- In late 2018, Kryon introduced AI-driven process discovery functionality which it continues to enhance.



Enhance AI Capabilities

- Via NLP, intent engines and predictive analytics features.



- Plans to enhance Decipher, an AI-enabled document processing tool, to support various document types, including purchase orders and contracts, and to expand third-party document processing capabilities.



Strategic Alliances & Acquisitions

- Joint development of new offerings and enhancement of existing ones.



- Entered into a strategic alliance with Oracle for cloud services and Toptal to develop and deliver Digital Workers.



- Blue Prism acquired Thoughtonomy, which adds as-a-service model and access to mid-tier enterprises.

AVASANT

RadarView Overview

Avasant's Intelligent Automation Tools RadarView assesses tool vendors across 3 critical dimensions:



Product Maturity

- This dimension considers the current state of the vendor's product portfolio in terms of the maturity of their tool features and functionalities, ease of deployment, and end-user focus.
- The nature and sophistication of solutions, use cases being addressed (IT, enterprise, and industry-specific automation), market acceptance, quality of talent, and execution capability are all important factors that contribute to this dimension.

Enterprise Adaptability

- This dimension focuses on the ease of setup, commercial flexibility, support infrastructure, speed of agreement, and contract closure.
- Additionally, the professional services support provided across technology lifecycle, including online/classroom training, assistance in setting up CoEs, developing POCs, implementation support, architecting and designing solutions, and configuration services.

Innovation Roadmap

- This dimension assesses the investment approach and innovation focus of the vendor, and how it aligns with the future direction of the industry.
- The overall strategic investments (organic and inorganic) towards capability and offering growth, technology development and human capital development, along with the innovations that the vendor develops with their partners, are critical aspects of this dimension.

Research methodology and coverage

Avasant based its analysis on a number of sources:

Public disclosures Publicly available information such as SEC filings, annual reports, quarterly earnings calls, executive interviews and statements.

Market interactions Discussions with enterprise executives leading digital initiatives and influencing IA tool vendor selection and engagement.

Vendor input Collected through an online questionnaire and structured briefings during June - July 2019.

Of the 25 IA tool vendors assessed, the final 14 featured in RadarView for 2019 are:



Note: Assessments for Automation Anywhere, Jacada, Kofax, NICE, Pegasystems, Softomotive, UiPath, Verint and WorkFusion have been conducted based on public disclosures and market interactions only

Other key vendors that are rapidly augmenting their capabilities and gaining traction in the IA space:

ANOTHER MONDAY

Another Monday's IA platform caters to a broad range of enterprise functions such as F&A, HR, customer service, etc. It focuses primarily on telecom and is one of the few vendors offering success-based pricing models.



Arago has taken an AI platform led strategy to develop HIRO, an IT and business process automation platform that leverages predictive analytics. This helps enterprises to scale RPA across functions rapidly, and at scale.



Automation Edge's IA platform is powered by AI and ML and facilitates the development of bots. It also offers 400+ ready-to-deploy bots catering to various enterprise and IT functions serving front, middle, and back-office.



Datamatics' offerings are focused on BFSI. Majority of its market presence is in APAC, followed by North America. In early 2018, It introduced TruBot Neuro, an enhancement to its RPA platform to introduce significant AI and ML capabilities.



HelpSystems offers RPA that integrates with business process workflows across an organization. Beyond this, it has OCR capability which it plans to augment with AI technologies such as NLP and ML.



Jidoka focuses on the business process outsourcing segmen, especially for BFSI and Utilities enterprises. It is also focused on the EU and LATAM markets. It is incorporating ML and OCR capabilities through partnerships with BigML and Abby.



Nividous' solution is built upon 4 pillars: user experience, agility, innovation, and scalability. It has developed bots specific to industry processes across BFSI, healthcare, and hi-tech verticals. It is rapidly gaining traction in the North American market.



Redwood automates ERP-based processes, including data extraction, for a range of enterprise functions and processes. It comes with built-in BPM capabilities and its architecture allows API-based integration to facilitate scalability.



Intelligent Automation Tools RadarView 2019

Reading the RadarView

Avasant has recognized IA tool vendors in 4 classifications:



Leaders show consistent excellence across all the key dimensions of the RadarView assessment (product maturity, enterprise adaptability, and innovation roadmap) and have had a superior impact on the market as a whole. These vendors have shown true creativity and innovation and have established trends and best practices for the industry. These vendors have proven their commitment to the industry and are recognized as thought leaders in the space that set the standard for the rest of the industry to follow. Leaders display a superior quality of execution and a reliable depth and breadth across verticals.



Innovators show a penchant for reinventing concepts and avenues, changing the very nature of how things are done from the ground up. Unlike the Leaders, Innovators have chosen to dominate in a few select areas or industries and distinguish themselves on the basis of superior innovation. These radicals are always hungry to create pioneering advancements in the industry and are actively sought after as trailblazers redefining the rules of the game.

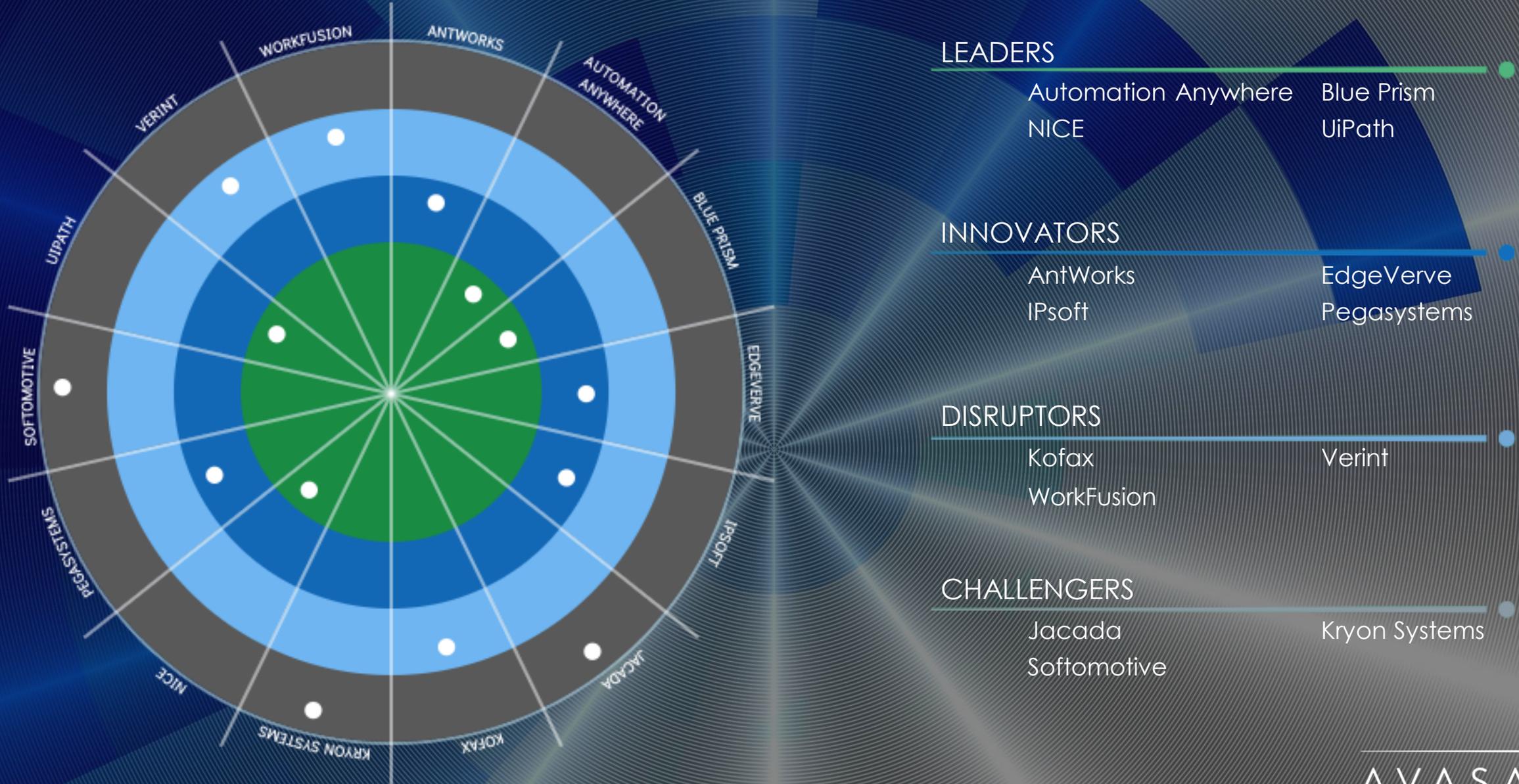


Disruptors enjoy inverting established norms and developing novel approaches that invigorate the industry. These vendors choose to have a razor-sharp focus on a few specific areas, and address those at a high level of granularity and commitment that result in tectonic shifts. While Disruptors might not have the consistent depth and breadth across many verticals like the Leaders or the innovation capabilities of the Innovators, they exhibit superior capabilities in their areas of focus.



Challengers strive to break the mold and develop groundbreaking techniques, technologies and methodologies on their way to establishing their unique position. While they may not have the scale as vendors in other categories, Challengers are eager and nimble, and use their high speed of execution to great effect as they scale heights in the industry. Challengers have a track record of delivering quality projects for their most demanding Global 2000 clients. In select areas and industries, Challengers might very well have capabilities that match or exceed those of the vendors in other categories.

Avasant has recognized 14 top-tier vendors supporting the enterprise adoption of Intelligent Automation tools





IA Tool Vendor Profiles

AntWorks: RadarView Profile



- Product Maturity ★★★★★
- Enterprise Adaptability ★★★★★
- Innovation Roadmap ★★★★★

Offers Cognitive Machine Reading using fractal science capabilities. Leverages partners to drive vertical focus and add deployment options.

Organization Overview	Client Case Studies												
<ul style="list-style-type: none"> Active Clients: 400+ Patents: N/A Major Releases per Year: 1 Commercial Model: Perpetual Licensing, Subscription, Per-bot, Per-process based Delivery Highlights: North America, UK, EU and APAC <div style="display: flex; justify-content: space-around; margin-top: 10px;"> <div style="border: 1px solid #ccc; padding: 5px; text-align: center;">70% Revenue Share of Intelligent Automation</div> <div style="border: 1px solid #ccc; padding: 5px; text-align: center;">30% Revenue share of professional services in IA</div> </div>	<ul style="list-style-type: none"> Implemented Cognitive Machine Reading (CMR) module in City Union Bank to accelerate the customer onboarding process. The module helped ingest unstructured data, contextualize it, and convert it into structured data, to achieve KYC norms. Deployed accounting/reconciliation process automation bots for KPMG. The CMR module was used to convert unstructured data and used ML to determine the tax incidence of clients. Hence, achieving 50% savings in operational costs. Deployed ANTstein for Mercer to edit 401(k) details for thousands of employees working at various Fortune 100 clients. It could read the mail and process all the documents, check for completeness and automatically make requested changes. Deployed ANTstein for Indecomm Global Services to automate mortgage loan processing. Its CMR module along with OCR were used to ingest various loan estimate documents and recognize and extract key data. 												
Products and Modules	Key Partnerships	Sample Clients	Automation Focus										
<ul style="list-style-type: none"> ANTstein - Integrated automation platform built using fractal science based AI/ML. Has 3 modules: Process Discovery, Cognitive Machine Reading (CMR) for data curation and QueenBOT (RPA) for Digital Workforce Management. 	<p>Technology Partners</p> <p>Implementation Partners</p>	<ul style="list-style-type: none"> City Union Bank KPMG Mercer Indecomm Global Services American Public University System CRISIL Jardine Lloyd Thompson Kotak Mahindra Bank Mercator Scot Tigerair Pte Ltd 	<table border="1" style="width: 100%; text-align: center;"> <tr><td style="background-color: #90ee90;">IT Automation</td></tr> <tr><td style="background-color: #e0f0e0;">Build</td></tr> <tr><td style="background-color: #90ee90;">Run/Maintain</td></tr> <tr><td style="background-color: #008000;">Enterprise Automation</td></tr> <tr><td style="background-color: #90ee90;">Contact Center</td></tr> <tr><td style="background-color: #008000;">Finance & Accounting</td></tr> <tr><td style="background-color: #008000;">HR Processes</td></tr> <tr><td style="background-color: #90ee90;">Procurement</td></tr> <tr><td style="background-color: #90ee90;">Legal / Compliance</td></tr> <tr><td style="background-color: #90ee90;">Industry-specific Automation</td></tr> </table>	IT Automation	Build	Run/Maintain	Enterprise Automation	Contact Center	Finance & Accounting	HR Processes	Procurement	Legal / Compliance	Industry-specific Automation
IT Automation													
Build													
Run/Maintain													
Enterprise Automation													
Contact Center													
Finance & Accounting													
HR Processes													
Procurement													
Legal / Compliance													
Industry-specific Automation													

Darker color indicates higher automation focus through IA tools ●●●●

Analyst Insights

Product Maturity



- The ANTstein platform is built using fractal science and has 3 building blocks: Availability, Usability, and Mobilization (AUM). It supports end-to-end processing, from the capability to read, identify, classify and digitize data, establishing data certainty and enrichment from external sources, to decisioning or transacting data using its own RPA stack or API-based consumption or microservices.
- It took a different approach towards machine vision and combined image recognition with NLP modeling, object recognition, fractal based machine learning, cognitive learning and heuristics to built Cognitive Machine Reader (CMR). CMR does not use and is completely different from OCR.
- It also offers vertical point bots that are 80% ready and need 20% customization for domain-specific tasks. Examples include TaxBot and TitleBot.
- In terms of security, its in-house credentials vault stores the user IDs and passwords in an encrypted manner and offers a multi-layered security solution.
- It introduced its partner program last year and since then, built a network of more than 50 partners (SIs and ISVs). These partners bring geo and vertical play. For instance, it partnered with Chazey Partners to expand its presence in Latin America; and with Ideas2IT, it tapped into the education vertical.

Enterprise Adaptability



- With its leadership team coming from back/front-office BPO background where resource utilization, infra utilization, business continuity were the prime KPAs, they brought these principles to digital operations management. Hence, it offers no-code/low-code solutions to design bots faster, increase bot productivity through cognitive responsiveness, offer multi-tenancy to optimize bot's utilization, and self-healing capability to manage system failures.
- With the help of its partner network, it added cloud as a deployment option. Enterprises can leverage the services of one of its cloud providers.
- It offers implementation support to its customers and recently launched LMS, a self-certification program in English and Japanese.
- It incentivizes customers by reducing implementation-related fixed costs for the initial year and offers additional modules at a discounted price.

Innovation Roadmap



- In July 2018, AntWorks raised USD 15M through Series A funding from SBI Holdings to drive growth by expanding its marketing and sales channels along with entering new markets including investments towards R&D.
- It plans to invest most of the organizations budget in improving its tools, including smarter BOT development to cut the development time in half and drive localization through NLP with a multi-lingual feature.
- It continues to upskill internal talent by organizing events/hackathons where participants are required to solve a real-life problem within a limited time. It also participates in consortiums, annual events, and summits for brand building, delivering thought leadership sessions and lead generation.

Automation Anywhere: RadarView Profile



Organization Overview

- Active Clients: 2,800+
- Patents: 5 (AI, System and compliance based automation)
- Major Releases per Year: 2
- Commercial Model: Per-bot costing
- Delivery Highlights: Global presence in 35 countries

700 Partners globally	1M+ Bots deployed
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Client Case Studies

- Deployed RPA in Eli Lilly's HR, sales, marketing, and clinical functions, and automated 10+ end-to-end processes, including payment notifications and doctor visit suggestions to sales representatives. Saved the client USD 1.47M and 3,850 hours.
- Implemented RPA solution to automate 30 processes of Bouygues Telecom. Overall, 8 departments leveraged the automation, with Finance and Customer Relations seeing the most ROI. Client forecasts a 400% savings for 2019 (>EUR 10M/year).
- Deployed and IQ Bot solution in Hitachi's procure-to-pay process, where it extracted data from semi-structured invoices. It helped automate 41 processes in Finance and Accounting.
- Deployed RPA solution to automate 22 of University of Melbourne's administrative processes across student admissions and faculty administration. This included data entry and attachments for admission applications, saving 10,000 hours annually.

- Product Maturity ★★★★★
- Enterprise Adaptability ★★★★★
- Innovation Roadmap ★★★★★

Cloud-focused. Larger ecosystem strategy includes free software, education on bot development, access to marketplace and online community.

Products and Modules

- Automation Anywhere Enterprise - RPA platform
- IQ Bot - Cognitive automation tool
- Bot Insight - Analytics platform
- BOTFARM - RPA-as-a-Service

Key Partnerships

Technology Partners

Implementation Partners

Sample Clients

- Eli Lilly and Company
- Bouygues Telecom
- Hitachi Vantara
- The University of Melbourne
- Stanley Black & Decker
- Cartus
- Symantec
- ZS
- Consumer credit-reporting agencies
- A large national telecommunications company

Automation Focus

IT Automation
Build
Run/Maintain
Enterprise Automation
Contact Center
Finance & Accounting
HR Processes
Procurement
Legal / Compliance
Industry-specific Automation

Darker color indicates higher automation focus through IA tools ●●●●

Analyst Insights

Product Maturity



- Automation Anywhere combines RPA, cognitive and embedded analytics technologies to offer comprehensive intelligent automation solutions across industries. It is working towards the democratization of automation where it follows 3 guiding principles: 1. it has to work for anyone (business user, IT user, developer), 2. got to be available anywhere on anything, and 3. it has to be available to any company regardless of size.
- It not only just strategic partners with leading cloud providers including AWS, Google Cloud, IBM Cloud, Microsoft Azure and Oracle Cloud to advance intelligent automation, but is certified with their cloud platform as well.
- It continue to invest heavily in 3 areas: R&D, global expansion, and acquiring new technologies/companies to further augment its platform. It recently acquired Klevops to enhance its process orchestration capabilities and partnered with DataRobot to include decision-making into its cognitive automation capabilities. It plans to increase the number of bots deployed by 200% to 3M by 2020.
- It plans to launch a completely web-based interface, bot sketch, which enables business users to drag-and-drop and build process seamlessly.

Enterprise Adaptability



- 2018 has been a landmark year for Automation Anywhere as it raised USD 550M in extended Series A funding, more than doubled its employee strength, expanded its partner network 3x to 700 globally and launched the industry's first online market for pre-configured downloadable RPA bots. The momentum continued in 2019, and in Q1 opened new offices in five locations, increasing global presence to 35 offices from 9 last year.
- As part of its larger ecosystem strategy, it introduced Community Edition, which is free for small businesses, students and developers. This will help small businesses to jumpstart their automation initiatives and enable developers to discover future-oriented processes that can be automated.
- It introduced intelligent automation cloud platform which offers enterprises a flexible cloud-based delivery model along with on-premise.

Innovation Roadmap



- Automation Anywhere plans to invest USD 100M over next 3-5 years to expand its operations in India and setup more R&D centers and train more people. To this regard, it plans to open fourth product engineering center in India by end of this year and triple its headcount to 3,000 in India.
- It launched Apeople, an online community platform for customers, partners and automation enthusiasts to share best practices, access resources and submit suggestions and ideas.
- It introduced the Automation Anywhere University (AAU) initiative where it is collaborating with 36 educational institutions across the globe to establish Bot Labs so that students are future-ready with RPA skills. Also, partnered with Virtusa for on-campus hiring where its Bot Labs have been set up.

Blue Prism: RadarView Profile



- Product Maturity ★★★★★
- Enterprise Adaptability ★★★★★
- Innovation Roadmap ★★★★★

Promotes enterprise automation. Offering per-bot costing model. Partner-centric organization. Drives collaborative innovation.

Organization Overview	Client Case Studies												
<ul style="list-style-type: none"> Active Clients: 1,337 Patents: 3 (High-dimensional data analysis) Major Releases per Year: 2-4 Commercial Model: Per-bot costing Delivery Highlights: US, UK, DACH, Japan and China <div style="display: flex; justify-content: space-around;"> <div style="border: 1px solid #ccc; padding: 5px; text-align: center;"> <p>97%</p> <p>Revenue Share of Intelligent Automation</p> </div> <div style="border: 1px solid #ccc; padding: 5px; text-align: center;"> <p>3%</p> <p>Revenue share of professional services in IA</p> </div> </div>	<ul style="list-style-type: none"> Automated 3 of Npower's processes: statement generation, emergency contact details, and missed contract renewal. Saved over 2M hours annually with a robot farm managed by few employees. Used RPA software to automate 15 core processes of Telefonica O2, including SIM swap and credit checks. Fetched data through HTML, Java Access Bridge and surface automation for Citrix and helped achieve a 3-year ROI of 650-800%. Applied operational agility software to automate The Co-operative Bank's procedure to review around 2,500 higher-risk accounts to process payments depending upon the account profile. Saved 23,660 hours/year. Deployed RPA software and leveraged IoT and telematics to track Schneider's extra miles driven due to a natural disaster and updated customer's orders to reflect the additional cost. Client collected more than USD 100K in additional revenue per hurricane. 												
Products and Modules	Key Partnerships	Sample Clients	Automation Focus										
<ul style="list-style-type: none"> Blue Prism Connected-RPA - RPA platform Blue Prism Decipher - A beta intelligent document processing program 	<p>Technology Partners</p> <p>Implementation Partners</p>	<ul style="list-style-type: none"> Npower Telefonica O2 The Co-operative Bank Schneider Walgreens Lloyds Banking Group Heineken International Western Union TD Bank Group Fannie Mae ATB Financial Mashreq Bank 	<table border="1" style="width: 100%; text-align: center;"> <tr><td style="background-color: #008000; color: white;">IT Automation</td></tr> <tr><td style="background-color: #008000; color: white;">Build</td></tr> <tr><td style="background-color: #008000; color: white;">Run/Maintain</td></tr> <tr><td style="background-color: #008000; color: white;">Enterprise Automation</td></tr> <tr><td style="background-color: #008000; color: white;">Contact Center</td></tr> <tr><td style="background-color: #008000; color: white;">Finance & Accounting</td></tr> <tr><td style="background-color: #008000; color: white;">HR Processes</td></tr> <tr><td style="background-color: #008000; color: white;">Procurement</td></tr> <tr><td style="background-color: #008000; color: white;">Legal / Compliance</td></tr> <tr><td style="background-color: #008000; color: white;">Industry-specific Automation</td></tr> </table>	IT Automation	Build	Run/Maintain	Enterprise Automation	Contact Center	Finance & Accounting	HR Processes	Procurement	Legal / Compliance	Industry-specific Automation
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Legal / Compliance													
Industry-specific Automation													

Darker color indicates higher automation focus through IA tools ●●●●

Analyst Insights

Product Maturity



- Blue Prism provides enterprise automation solutions through the per-bot costing model that may be used for IT and industry-specific automation.
- It drives platform adoption through its growing partner ecosystem, and its recently launched Intelligent Automation (IA) marketplace, Blue Prism Digital Exchange (DX), for customers, technology and channel partners to access pre-built AI, accelerating time-to-market and drive scalability.
- It continues to build out IA capabilities via technology partners and recently included Enate, OpenConnect, and Tabscanner to its Technology Alliance Program (TAP) as affiliates. These partners bring-in Artificial Intelligence (AI), Optical Character Recognition (OCR), service orchestration and data extraction capabilities to the platform.
- In terms of security, all credentials are stored in an encrypted database and transmitted across the wire in an encrypted state.
- In April 2019, it launched Decipher, which adds document processing capability into its RPA platform and helps scan invoices, identify data points irrespective of their format or location and further extract those data-points for use within the RPA process.

Enterprise Adaptability



- Blue Prism is a partner-centric organization and provides various support services through them to its customers. These services include training, setting up CoEs, developing POCs and implementation support, while it supports partners with its professional services teams as needed.
- It offers various incentives to its clients through implementation partners including managed services to incorporate full usage of their discounted cloud platform. It also has contractual models that are used by clients to pay for outcomes rather than software and services.
- It raised EUR 40M last year to expand into new markets such as the Asia Pacific and strengthen its important territory, the US. It recently opened an office in Sweden to serve Nordic customers where it is seeing traction from automotive, banking, financial services, and telco verticals.

Innovation Roadmap



- Blue Prism recently acquired Thoughtonomy which strengthens its cloud delivery capabilities and subsequently adds the As-a-Service commercial model and gives access to mid-tier enterprises.
- It expanded its R&D capabilities by adding a dedicated AI Research Labs in London in January 2019, which include research scientists and engineers across multiple AI fields. The agenda is to further develop the platform's embedded AI capabilities and has already launched its first product, Decipher.
- It organizes various hackathons and developer connects for talent acquisition and skill development. It participates in industry events and consortiums for marketing and industry development purposes.

EdgeVerve: RadarView Profile



- Product Maturity ★★★★★
- Enterprise Adaptability ★★★★★
- Innovation Roadmap ★★★★★

Leverages Infosys Nia. Adds functional capabilities through partnerships. Enhanced portfolio to serve entire value chain, and offer customized solutions.

Organization Overview	Client Case Studies												
<ul style="list-style-type: none"> Active Clients: 200+ Patents: 24 (RDA, ML) Major Releases per Year: 1 Commercial Model: Perpetual Licensing, Per-bot, Per-Process based, Outcome-based Delivery Highlights: 6 offices (5 in India and 1 in the US) <div style="display: flex; justify-content: space-around; margin-top: 10px;"> <div style="border: 1px solid #ccc; padding: 5px; text-align: center;"> <p>43%</p> <p>Revenue Share of Intelligent Automation</p> </div> <div style="border: 1px solid #ccc; padding: 5px; text-align: center;"> <p>57%</p> <p>Revenue share of professional services in IA</p> </div> </div>	<ul style="list-style-type: none"> Implemented AssistEdge Engage for a European telecom provider. It automated 6 operations including SIM swap and eliminated the need for multiple logins by pulling customer info from disparate apps into a single panel. Reduced AHT by 40%. Deployed AssistEdge bots for a US financial services company to automate the process of reclaiming payments for fraudulent transactions. It searched multiple fields to identify the fraudulent charges and maintained an audit trail. Saved USD 5K in 6 months. Used Albie, the cognitive engine powering AssistEdge RPA and ML, to automate the procurement process for a retail company. It identified data coming from PO, invoice, delivery receipt for 3-way matching, extracted using OCR, updated in SAP. Cut invoicing time from 15 to 3 days. A Middle Eastern bank's customer data was non-digitized, inconsistent, and in physical formats that required manual intervention to process salaries. Implemented AssistEdge RPA for end-to-end automation which cut salary processing time from 48 hours to 6 minutes. 												
Products and Modules	Key Partnerships	Sample Clients	Automation Focus										
<ul style="list-style-type: none"> AssistEdge Robotic Process Automation - RPA tool AssistEdge Discover - Process discovery product AssistEdge Engage - Contact center automation 	<p>Technology Partners</p> <p>Implementation Partners</p>	<ul style="list-style-type: none"> A European multinational telco provider One of the largest financial services companies in the US A global retail giant A Middle Eastern bank A European multinational healthcare company Curtin University Motilal Oswal Financial Services Telekom Malaysia Vodafone New Zealand 	<table border="1" style="width: 100%; text-align: center;"> <tr><td style="background-color: #90ee90;">IT Automation</td></tr> <tr><td style="background-color: #e0ffe0;">Build</td></tr> <tr><td style="background-color: #90ee90;">Run/Maintain</td></tr> <tr><td style="background-color: #008000;">Enterprise Automation</td></tr> <tr><td style="background-color: #90ee90;">Contact Center</td></tr> <tr><td style="background-color: #008000;">Finance & Accounting</td></tr> <tr><td style="background-color: #008000;">HR Processes</td></tr> <tr><td style="background-color: #90ee90;">Procurement</td></tr> <tr><td style="background-color: #90ee90;">Legal / Compliance</td></tr> <tr><td style="background-color: #90ee90;">Industry-specific Automation</td></tr> </table>	IT Automation	Build	Run/Maintain	Enterprise Automation	Contact Center	Finance & Accounting	HR Processes	Procurement	Legal / Compliance	Industry-specific Automation
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Industry-specific Automation													

Darker color indicates higher automation focus through IA tools ●●●●

Analyst Insights

Product Maturity



- EdgeVerve specializes in 3 industries (banking, insurance and telecom) covering such processes as onboarding, reconciliation, trade finance, claim adjustment, assurance, and billing. It recently launched the AssistEdge Engage platform to drive focus on contact centers.
- AssistEdge RPA offers an end-to-end automation tool that leverages the intelligent automation capabilities of its parent company, Infosys Nia, and other AI providers including Microsoft and Google. It also supports multiple OCR engines including Microsoft MODI, Google Tesseract, and ABBYY Flexicapture that enable processes to read text from the screen or PDFs.
- One process can be subscribed by multiple Robots and automation can be performed based on Robot availability.
- In terms of security, it supports AES 256 for data encryption at rest and TLS1.2 per customer policies. It partnered with CyberArk for credential security.
- It collaborates with technology partners such as Jaggaer for procurement and Nipendo for invoicing process automation. Also, it is expanding its geo scope by partnering with various regional players for implementation.

Enterprise Adaptability



- EdgeVerve's platform's multi-layered architecture provides the upward and downward scalability, which can be assessed with help of a dashboard that provides real-time data, including processes that are queued up, processes completed successfully or with exceptions, etc.
- It provides professional services such as online/classroom training, assistance in setting up CoEs, developing POCs, implementation support, architecting and designing solutions, and configuration services. This helps in cutting-down implementation time and ease of setup.
- It offers flexible commercial models, including perpetual licensing and subscription-based, plus a few innovative ones such as transaction and outcome-based pricing for particular scenarios.

Innovation Roadmap



- EdgeVerve views intelligent automation evolution journey from the Value Discovery phase in pre-2017 (Pilots and POCs) to Value Demonstration in 2017-18 (moving POCs to scale and emergence to front-office use cases) to Value Expansion post 2019 where process discovery will drive automation roadmap. Earlier this year, it introduced AssistEdge Discover to tap into this trend and help reduce the development time.
- Its R&D focus is primarily around 3 areas: user experience, software performance and enterprise security.
- To drive innovation, it organizes Botathon (The Big Bot league) to encourage students and developers to create a bot for solving simple day to day business scenarios by leveraging AssistEdge Community Edition which provide access to EdgeVerve's in-built bots.

IPsoft: RadarView Profile



Organization Overview

- Active Clients: 600+
- Patents: 3 (Amelia)
- Major Releases per Year: 3-6
- Commercial Model: As-a-Service, Perpetual Licensing, Subscription (on-premise)
- Deployment Type: HQed in NYC, has offices in 15 countries

650+ Skilled Digital Workers on 1Store	4 Innovation Hubs
--	-------------------

Client Case Studies

- Automated the offboarding process of a global telecom company in a specific region by recording a single offboarding process in the 1RPA platform and converting it into a scalable bot. Reduced Mean Time to Resolution (MTTR) for offboarding by 81%.
- Deployed Amelia to automate BNP Paribas Securities Services' tasks in 2 client-facing websites: 1) client portal to manage employee benefit plans, and 2) provide information on the settlement of trades. It is due to be operational and will help free up resources.
- Implemented Amelia to resolve SEB's employee IT issues. It was trained to communicate in natural language and achieved 93% intent recognition (in 7% scenarios escalated to the team). Later introduced as an external-facing chat agent.
- Deployed Amelia as a whisper agent at Allstate's call center. Reduced call time from 4.6 to 4.2 mins, for thousands of calls handled each day. Also, 75% of inquiries were solved during the first call with Amelia, up from 67% previously.

- Product Maturity ★★★★★
- Enterprise Adaptability ★★★★★
- Innovation Roadmap ★★★★★

Offers RPA solution powered by conversational AI. Specializes in IT and Enterprise automation. Integrated ecosystem approach.

Products and Modules

- 1Desk - Offers a conversational virtual agent (Amelia), IT process automation (IPcenter), and robotic process automation (1RPA) as a single integrated platform.
- 1RPA - RPA Platform
- Amelia - Conversational AI Agent
- IPcenter - Integrated ITSM platform

Key Partnerships

Technology Partners

Implementation Partners

Sample Clients

- A global telecommunications company
- BNP Paribas Securities Services
- SEB
- Allstate
- Becton Dickinson
- A telecommunications company in Japan
- A British multinational hotel management company
- An online gaming company
- A Swiss investment bank

Automation Focus

IT Automation
Build
Run/Maintain
Enterprise Automation
Contact Center
Finance & Accounting
HR Processes
Procurement
Legal / Compliance
Industry-specific Automation

Darker color indicates higher automation focus through IA tools ●●●●

Analyst Insights

Product Maturity



- IPsoft specializes in IT and enterprise automation, which covers use cases involving service desk, infrastructure management, whisper agent, contact center agent, and shared services (HR, IT and finance).
- Introduced last year, 1Desk is an end-to-end integrated automation system that combines the capabilities of its conversational virtual agent (Amelia), IT Process Automation (IPcenter) and Robotic Process Automation (1RPA). It is fully multi-tenant, allowing service providers to manage clients from the same instance.
- 1Desk can integrate with legacy systems/applications, including ServiceNow, and offers Amelia as the front-end interface to resolve issues via chat/voice. Amelia strengthens the platform through its ability to understand language, to switch and understand the context. As Amelia is trained on the business process, in parallel 1RPA enables the creation of bot thus accelerating creation time.
- 1Desk architecture is built as micro-services, so it scales horizontally and is preferably deployed using containers (Docker) and scaled via Kubernetes.

Enterprise Adaptability



- 1RPA is available as a yearly, per-bot subscription with no fees for any additional components.
- IPsoft's professional services team helps monitor and maintain applications, remediate issues, and upgrade the application. It also offers on-site implementation support through its cognitive and implementation teams and help set up CoEs to train and transfer methodologies.
- It also provides flexibility to incorporate 3rd-party automation, such as RPAs from Automation Anywhere, Blue Prism where proper APIs are available.
- Recently, it introduced 1Store, an end-to-end store of digital workers that includes back-office automation and allows enterprises to assess and evaluate Amelia to fill various roles across verticals.

Innovation Roadmap



- At present, each partner/customer has access to internal resources via Slack and Confluence portals and plans to launch a public forum later in 2019.
- IPsoft follows the integrated ecosystem approach, tightly linking automation and cognitive technologies, connecting a variety of enterprise systems (IT, finance, supply chain, etc.). It is bringing in a conversational AI platform as the front-end interface to automated business and customer services.
- It is focused on simplifying automation with ready-made virtual agents for specific use cases with roles, abilities, and integration into backend systems. Hence, it plans to further enhance its 1Store offering around agent training and recommendations and packaged vertical solutions.
- It is working on intelligent channel optimization as customer and employee expand across modalities and channels, including voice, text, email, apps.

Jacada: RadarView Profile



Product Maturity ★★★★★

Enterprise Adaptability ★★★★★

Innovation Roadmap ★★★★★

Specializes in customer service automation. Expands digital self-service and invests in AI. Focus on regional support and growing partner network.

Organization Overview

- Active Clients: N/A
- Patents: 4 (Visual IVR technology)
- Major Releases per Year: 1
- Commercial Model: As-a-Service, Subscription
- Delivery Highlights: 5 offices globally, with HQ in Israel

20% Growth in bookings, 2018	25% New customers through partners, 2018
---------------------------------	---

Client Case Studies

- Implemented Unified Desktop solution in Telefonica's call center to provide an intelligent view of customer data and the processes. Reduced average handling time (AHT) by 43 secs and achieved 12% efficiency gains.
- Implemented Agent Scripting (JAS) at Priceline to enable the integration of call scripts with back-end customer data and equip the agents with the customer-specific content. Saved 50-60 secs by automating data collection and eliminating customer's hold time.
- Implemented Fusion in Vodafone's call center to provide a Single User Interface (SUI) which the agent can utilize to get customer information, perform verification, and close customer deal. Reduced average call time from 10-20 mins to 4-8 mins.
- To pull customer data from Lillian Vernon's multiple legacy systems and display in an intuitive user interface for an agent, implemented Workplace. Reduced the average call time by 17% and system training time by 50%.

Products and Modules

- csRPA – Customer service RPA platform
- Jacada Interact - No-code development platform
- Smart Agent Assistant - Assisted-service chatbot
- Customer Assistant - Chatbot
- Visual Assistant - Visual IVR
- Jacada Unified Agent Desktop - A unified desktop solution

Key Partnerships

Technology Partners

Implementation Partners

Sample Clients

- Telefonica O2
- Priceline
- Vodafone
- Lillian Vernon
- Kabel Deutschland
- Capita
- DIRECTV
- Liberty Mutual
- UBS
- AIG
- Georgia Natural Gas
- Manulife

Automation Focus

IT Automation
Build
Run/Maintain
Enterprise Automation
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Darker color indicates higher automation focus through IA tools ●●●●

Analyst Insights

Product Maturity



- Jacada specializes in customer service automation to drive a two-fold agenda: 1) customer self-service interactions through virtual assistants, visual assistants and chatbots, and 2) agent assisted-service using AI and RPA.
- Built its solutions using a low-code customer service automation framework, Jacada Interact, that integrates with the existing enterprise system and requires no changes to existing Windows or any legacy systems. In terms of security, it encrypts data in motion through HTTPS and performs regular security audits to discover and prevent vulnerabilities. Additionally, it provides secure VPN and role-based system access.
- The Interact platform is based on MongoDB, with every component is constructed as a micro-service that allows it to scale per the requirements. It is available either as a cloud service or on-premise implementation.
- Its dedicated contact center solution, Jacada Fusion, enables customer service representatives (CSRs or agents) with process simplification, workflow automation, call scripting, and the ability to upsell and cross-sell. It offers dashboards, reports, and alerts for effective management.

Enterprise Adaptability



- Jacada mentors its customers while developing and maintaining the solution, and additionally guides on how to train those implementing the solution.
- Once the IA account is enabled, it provides customer flexibility to select the NLP engine. Jacada's IA supports Google DialogFlow, IBM Watson Conversation, and Wit.Ai.
- It doubled its newly acquired RPA customers in 2018 and continues to strengthen its direct sales model and expand partner network including GSIs and cloud-based contact center as a service (CCaaS) players. Its go-to-market strategy also includes building a partnership with local Indian SIs as well as having a direct presence to provide regional professional services.

Innovation Roadmap



- Jacada plans to continue to expand digital self-service and invest in AI. It released Jacada Interact version 11 in January 2018, which in a way merges RPA with virtual assistant capabilities and comes with embedded RPA designer, real-time cognitive analytics and a modern UI.
- Early last year, it raised USD 4.5M from multiple investors. It plans to continue to drive focus on the Virtual Customer Assistants and Chatbots, Desktop Unification, and Automation, Agent Guidance, Agent Personal Assistant and Visual IVR.
- It conducts surveys to gather the perspective of its customers around managing customer service experience within their respective organizations. This helps them to identify pain points and innovate accordingly.



Organization Overview

- Active Clients: 20,000+
- Patents: 200+ (RPA and others)
- Major Releases per Year: 1-2
- Commercial Model: As-a-Service, Subscription (on-premise)
- Delivery Highlights: Americas, EMEA, and APAC regions

650+	35+
Resellers	Country presence

Client Case Studies

- Automated the invoicing process of a global telco by implementing Kofax Capture and Kofax Transformation to extract info from vendor invoices. Using Kofax RPA, invoices were retrieved from portals and integrated with finance systems. Reduced FTEs processing invoices by 50%.
- Implemented Kofax RPA to automate a European bank's data-gathering processes linked to KYC checks. Robots trawl the bank's internal systems, databases, and external sources to verify the customer's identity. Reduced the data gathering time from 15 mins to 90 secs.
- Automated tracking and auditing of Redwood Logistics. Kofax RPA captured information around the location, progress, delivery milestones and flagged anomalies to the accounts department. It tripled the order volume while maintaining the cost levels.
- Implemented Kofax RPA to automate Arrow Electronics' procurement process, including the logging into a web portal, using credentials to request a quote and evaluating the response delivered via email. Hence, reduced manual effort by 3 mins per order.

Products and Modules

- Kofax Intelligent Automation Platform
- Kofax RPA - Robotic process automation platform
- Kofax TotalAgility® Platform – BPM platform
- Kofax Capture - Cognitive platform
- Kofax Transformation – Document transformation
- Kofax Insight – Advanced Analytics platform

Key Partnerships

Technology Partners

Implementation Partners

Sample Clients

- A global telecommunications provider
- A European Bank
- Redwood Logistics
- Arrow Electronics
- North American Logistics Company
- ABN AMRO
- Crete Carrier Corporation
- Duncan and Son Lines, Inc.
- Marginalen Bank
- Turkcell

Automation Focus

IT Automation
Build
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Industry-specific Automation

- Product Maturity** ★★★★★
- Enterprise Adaptability** ★★★★★
- Innovation Roadmap** ★★★★★

Platform-centric approach. Focus on data capture and RPA marketplace. Augmenting its IA platform through acquisitions.

Darker color indicates higher automation focus through IA tools ●●●●●

Analyst Insights

Product Maturity



- Kofax went through a branding, positioning and messaging update to move away from being a “capture company” to an “integrated intelligent automation platform provider”. However, its capture business continues to be the cash cow segment, which allows it to pursue new areas of expansion.
- Over the years, Kofax invested over USD 500M on 6 complementary automation acquisitions, including RPA technology, to offer intelligent automation solutions for the entire process: from cognitive capture to data transformation to process orchestration and customer communications.
- Kofax offers an integrated IA platform with native capabilities built-in, including AI, NLP, ML and Intelligent Screen Automation using Bayesian Classifiers. This negated the need for third-party AI technology. It also brings-in native customer communications, mobility, and electronic signature capabilities. It digitizes critical touchpoints such as onboarding new policyholders and processing insurance claims in insurance industry, etc.
- In 2019, it augmented its IA platform by acquiring Nuance’s Document Imaging (NDI) in January 2019 and Top Image Systems in May 2019. These acquisitions help strengthen its digital capture and SaaS-based capabilities and expand its reach among MFP manufacturers.

Enterprise Adaptability



- Kofax helps build, manage and scale RPA pilot projects at the enterprise level. For instance, ABN AMRO, using Kofax platform, scaled the digital workforce and saved thousands of employee-hours of work per week and improved customer experience.
- It offers its software and solutions directly as well as leveraging its 650 indirect channel partners and integrators across the Americas, EMEA, and APAC. Expanding its geo reach through partner channels, Kofax Japan partnered with Fujitsu last year for market development activities.
- Kofax’s free IA “Starter Pack,” consisting of production licenses, allows existing customers to test the IA platform and map their automation journey. In the past, it offered Kofax Capture and Kofax Transformation software free for the first year, allowing new customers up to 10,000 scanned pages.

Innovation Roadmap



- Kofax continues to invest in innovation and was recently awarded 9 new patents by the USPTO for multiple technologies, including RPA, cognitive capture, mobility, and financial process automation.
- It look at the opportunities in 2 areas, data capture and RPA marketplace. And, recently introduced a marketplace to enable its customers and partners to leverage its pre-built, low-code RPA bots and connectors. Many solutions integrate/connect with products from Google, Microsoft, Oracle.
- Kofax continues to drive focus towards platform-centric approach and invest in intelligent automation technologies to offer a unified platform which serves as an one-stop-shop solution for the enterprises.

Kryon Systems: RadarView Profile

KRYON



- Product Maturity ★★★★★
- Enterprise Adaptability ★★★★★
- Innovation Roadmap ★★

Introduced process discovery to cover the entire automation value chain. Continues to invest in enhancing the platform with AI capabilities.

Organization Overview	Client Case Studies												
<ul style="list-style-type: none"> Active Clients: 150+ Patents: 5 (Computer Vision and ML) Major Releases per Year: 2-4 Commercial Model: Subscription (on-premise) Delivery Highlights: 10 offices, 7 countries <div style="display: flex; justify-content: space-around; margin-top: 10px;"> <div style="border: 1px solid #ccc; padding: 5px; text-align: center;"> <p>85%</p> <p>Revenue Share of Intelligent Automation</p> </div> <div style="border: 1px solid #ccc; padding: 5px; text-align: center;"> <p>15%</p> <p>Revenue share of professional services in IA</p> </div> </div>	<ul style="list-style-type: none"> Deployed unattended robots to help migrate HPE customers to new service contracts. It performed 66,500 transactions in 30 months versus 71 months if contracts were renewed manually. Reduced transaction time by 42%. Improved Amber Beverage Group's customer service and streamlined the PO process using Kryon Unattended Automation. As a result, approval requests are delivered to relevant team members on a set schedule and can be handled from a computer or smartphone. Implemented Kryon Unattended Automation to help AIG's customer service representatives (CSRs) with its growing workload. It automated 12 processes including following-up with new customers for documentation of safe driving. Saved 67-83 monthly work hours per process. Automated the onboarding process of Wyndham Hotels and Resorts by deploying Kryon discovery robots which ran in the background to identify processes to automate. The process completed ahead of schedule and eliminated the need to hire 500 temporary employees. 												
Products and Modules	Key Partnerships	Sample Clients	Automation Focus										
<ul style="list-style-type: none"> Kryon Attended Automation - Attended robot Kryon Unattended Automation - Unattended robot Kryon Hybrid Automation - Human and virtual workforces work together Kryon Process Discovery - Discovery robot Kryon Automation Suite - Automation suite 	<p>Technology Partners</p> <div style="display: flex; justify-content: space-around; align-items: center;"> </div> <div style="display: flex; justify-content: space-around; align-items: center; margin-top: 10px;"> </div> <p>Implementation Partners</p> <div style="display: flex; justify-content: space-around; align-items: center;"> </div> <div style="display: flex; justify-content: space-around; align-items: center; margin-top: 10px;"> </div> <div style="text-align: center; margin-top: 10px;"> </div>	<ul style="list-style-type: none"> HPE Amber Beverage Group AIG Wyndham Hotels and Resorts Ferring Pharmaceuticals Microsoft Singtel Verizon American Express Santander Bank Netherlands based logistics company 	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="background-color: #008000; color: white;">IT Automation</td></tr> <tr><td style="background-color: #00ff00;">Build</td></tr> <tr><td style="background-color: #008000; color: white;">Run/Maintain</td></tr> <tr><td style="background-color: #00ff00;">Enterprise Automation</td></tr> <tr><td style="background-color: #00ff00;">Contact Center</td></tr> <tr><td style="background-color: #00ff00;">Finance & Accounting</td></tr> <tr><td style="background-color: #00ff00;">HR Processes</td></tr> <tr><td style="background-color: #00ff00;">Procurement</td></tr> <tr><td style="background-color: #00ff00;">Legal / Compliance</td></tr> <tr><td style="background-color: #00ff00;">Industry-specific Automation</td></tr> </table>	IT Automation	Build	Run/Maintain	Enterprise Automation	Contact Center	Finance & Accounting	HR Processes	Procurement	Legal / Compliance	Industry-specific Automation
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Legal / Compliance													
Industry-specific Automation													

Darker color indicates higher automation focus through IA tools ●●●●

Analyst Insights

Product Maturity



- Kryon with its process discovery and RPA solution intends to cover the entire automation value chain. Kryon launched its process discovery solution last year, which uses AI analytics engine to generate a picture of business processes, evaluate and recommend either its attended (i.e. desktop) or unattended (virtual-machine-based) solution depending on the automation requirement.
- It supports any software environment or computer application (Citrix/legacy systems) without the need for integrations with third-party platforms. It does support integrations with third-party NLP technologies, which enable robots to manipulate unstructured information such as emails, instant messages.
- In terms of security, Kryon supports both database-level and application-level encryption. The data at rest is encrypted by AES256 and uses TLS1.2 for data-in-transit communication.
- It plans to strengthen its partner network, including both large and small regional resellers and introduced a formalized program that categorizes partners into 4 tiers: Gold, Silver, Bronze, and Referral. It brought in new VP of Global Channels to manage partners' efforts and initiatives.

Enterprise Adaptability



- Kryon offers seamless RPA and processes discovery integration. A customer can import workflows from Kryon Process Discovery into Kryon's RPA development studio, doing away with the need for RPA developers to create workflows from scratch.
- It provides online training as well as 1 week of onsite training for developing bots. As part of its professional services, it provides assistance in setting up CoEs while its pre-sales team provides assistance in developing POCs. Outside of this, it offers 24/7 support through its support center in Bulgaria which forms part of Tier 1 & 2 support, Customer Services Expert in each region (Tier 3) and R&D and product support from Israel (Tier 4).
- Its online community platform offers an opportunity for various users to share knowledge and ideas, gain assistance on Kryon's RPA tools, etc.

Innovation Roadmap



- Kryon continues to focus on the process discovery phase and released version 19.1 that includes an optimized algorithm, making easier to find processes. It has an improved UI and recommendation engine. It plans to introduce a SaaS solution especially aimed at the SMB segment.
- In February 2019, it raised USD 40M in Series C funding which it plans to utilize for product development and market expansion. It already has plans to bring in NLP capabilities towards the end of 2019, in partnership with Microsoft. This will be followed by the introduction of intent engines and predictive and preventive analytics capabilities by 2020.
- It plans to enhance security features by including two-factor authentication, single sign-on (SSO) and credential vaults.



Organization Overview

- Active Clients: 400+
- Patents: 298
- Major Releases per Year: 1
- Commercial Model: As-a-Service, Subscription (on-premise)
- Delivery Highlights: Global offices in 19 countries

USD 1.4B	8%
2018 revenue	YoY increase in 2018 revenue

Client Case Studies

- Automated Italy's financial services group call handling process by implementing NICE Robotic Automation along with desktop automation. It assisted agents in the call wrap-up phase by documenting the case, thus reducing turnaround time by 82%.
- Deployed Robotic Automation for a public sector organization responsible for collecting taxes. The solution gathered and analyzed customer information to manage requests for financial information. Reduced handling time from 90 secs to 15 secs.
- Automated order entry process for a home furnishing retailer using NICE Robotic Automation. It entered delivery requests for the successful list, while a desktop robot managed the error list, providing delivery time and contact information to agents. Saved 4,000 man-hours.
- Deployed more than 100 NICE robots to execute and monitor 23 back-office processes for a telco provider. The solution was scalable to manage peak demand and cut handling time from 42 to 19 days.

Products and Modules

- NICE Advanced Process Automation - RPA platform
- NEVA - NICE employee virtual attendant

Key Partnerships

Technology Partners

Implementation Partners

Sample Clients

- Italy's major financial services group
- A public sector organization
- A home furnishing retailer
- A telecommunications provider
- Oil and gas multinational company
- A courier delivery services company
- Thomas Cook
- Asurian
- TIM

Automation Focus

IT Automation
Build
Run/Maintain
Enterprise Automation
Contact Center
Finance & Accounting
HR Processes
Procurement
Legal / Compliance
Industry-specific Automation

- Product Maturity ★★★★★
- Enterprise Adaptability ★★★★★
- Innovation Roadmap ★★★★★

Drives focus on cloud through open source platform. Customer engagement remains primary market. Expanding focus from back- to front-office.

Darker color indicates higher automation focus through IA tools

Analyst Insights

Product Maturity



- Over the years, NICE has transitioned from a product company to an enterprise software provider with a business built upon 4 strategic pillars: Cloud, Digital, Automation & AI, and Analytics. It operates in 2 main markets: Customer Engagement, and Financial Crime and Compliance. Customer Engagements is where it serves contact centers, back-office operations, and retail branches, across multiple industries, and drive 80% of revenue.
- Lately, it has been investing in partnerships to drive full digitization to both front- and back-office processes. Its recent partnership with CallVU offers visually enriched IVR with the automation of complex back-end processes. It expanded its partnership with ABBYY to streamline the processing of unstructured data contained in scanned documents and integrate with NEVA, its virtual assistant which it launched last year.
- In July 2019, it launched RPA version 7.1 which deepens its AI capabilities for the automation discovery process and real-time monitoring intelligence. Separately, it collaborated with AWS to expand its Cognitive Robotic Automation Platform to Amazon Lex chatbot, which allows customers to interact with service centers and resolve issues on a real-time basis.

Enterprise Adaptability



- NICE offers an open cloud platform that delivers pre-built CRM integrations, such as Salesforce.com, or partner-provided integration with unified communication tools. This enables seamless collaboration between contact center agents and experts in their organization.
- It serves enterprises both directly and indirectly through its partner channel. Its professional services support covers the entire technology lifecycle, including defining requirements, planning, designing, implementing, customizing, optimizing, proactively maintaining, and providing ongoing support.
- In January 2019, it introduced the NICE Robotic Automation Community, offering educational resources and global best practices to RPA professionals. Separately, it is also guiding the process of setting up CoEs and is providing necessary methodologies, training, best practices, and tools.

Innovation Roadmap



- NICE foresees demand for open software platforms that provides fully-integrated solutions based on a shared framework of service, allowing easy deployment, flexible functionality and seamless addition of third-party solutions that extend the platform's functionality to industry-specific needs.
- Additionally, the demand for cloud solutions is on the rise mostly from small and mid-size organizations as it provides flexible and cost-effective deployment models. This trend is also picking up in large enterprises as cloud providers improve their capabilities around security and scalability.
- To address the growing demand for professionals for automation projects, it is offering a range of training, knowledge resources and programs to help enterprises and partner communities to successfully drive automation initiatives.

Pegasystems: RadarView Profile



Organization Overview

- Active Clients: N/A
- Patents: 36 (UI, coding etc.)
- Major Releases per Year: 2-3
- Commercial Model: Perpetual Licensing, Cloud-based Subscription Model
- Delivery Highlights: Americas, EMEA, APAC

USD 892M Total revenue, 2018	55% Subscription-based revenue
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Client Case Studies

- Implemented Pega RPA for Unum to improve customer experience and employee engagement. It deployed unmanned and unmonitored bots to reduce mandatory steps including review process. Automated 50-80% steps in customer journey processes.
- Deployed Pega Workforce Intelligence (WFI) for Link Market Services to assess employee utilization rates and potential capacity. These insights lead to implementation of Pega Case Management within anti-money laundering and compliance teams to improve productivity.
- Implemented Pega Robotics for Radial to eliminate the need for its agents to navigate across 30 disparate applications to process service requests. WFI provided management with a transparent view of its workforce performance. Cut call handling time to 30 seconds.
- Implemented Pega Platform for Robobank to digitize its commercial loan and lease processes. Reduced the loan approval process from several weeks to 24 hours and streamlined the loan application requirements from 10 to 3 documents.

Products and Modules

- Pega Infinity – Automation platform that integrates its CRM, RPA and AI capabilities
- Pega Robotic Automation - RPA platform
- Pega Robotic Desktop Automation (RDA)
- Pega Workforce Intelligence (WFI)

Key Partnerships

Technology Partners

Implementation Partners

Sample Clients

- Unum
- Link Market Services
- Radial
- Rabobank
- GE Healthcare
- Siemens
- ACSO
- ANZ
- Santander
- Coca-Cola
- An agriculture and construction equipment company

Automation Focus

IT Automation
Build
Run/Maintain
Enterprise Automation
Contact Center
Finance & Accounting
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Procurement
Legal / Compliance
Industry-specific Automation

- Product Maturity** ★★★★★
- Enterprise Adaptability** ★★★★★
- Innovation Roadmap** ★★★★★

Specializes in BPM and CRM solutions. Unified platform with CRM, RPA and AI capabilities. Transitioning to cloud-based subscription model.

Darker color indicates higher automation focus through IA tools ●●●●

Analyst Insights

Product Maturity



- Pegasystems specializes in business process management (BPM) and customer relationship management (CRM) solutions. In June 2018, it introduced Pega Infinity which integrates its CRM, RPA and AI capabilities into a single platform that helps enhance its marketing campaign solution, provide dynamic UI templates to improve customer experience, offer a library of pre-built bots, and new OCR capabilities for virtual assistant for email. The platform comes with a sentiment analysis features and provides predictive analytics for industries such as insurance and financial services.
- To further enhance its AI capabilities, it recently introduced real-time AI connectors which give clients the flexibility to complement Pega AI with other AI engines, including new deep learning and machine vision capabilities as well as alternative machine learning and NLP services.
- As the customer service industry moves towards chat/messaging instead of voice interaction, it launched new digital messaging capabilities within Pega Customer Service that can help clients connect with their customers regardless of the messaging app. Also, it acquired a digital messaging platform, In The Chat (ITC), that unifies text messaging, social media, live chat, email, messengers, and chatbots for a conversation with customers.

Enterprise Adaptability



- Pegasystems' low-code platform provides integration capability to connect Pega apps to other services. Its system has a drag-and-drop interface, thus eliminating the need for developers to hard code connectors within apps.
- It treats RPA bots as connectors, thus making it easy to reuse where APIs don't exist. Additionally, for all clients, it provides access to its library of pre-built bots that help save time on common business tasks. Along with multi-tenancy capability, it enables scalability and reduces the cost of operations.
- In June 2018, it launched the Pega Community, an open online community for users of varying experience levels to build software without coding.
- It also aids enterprises in setting up CoEs and works with them to jointly define scope and roadmap to achieve business goals.

Innovation Roadmap



- It plans to invest USD 200M over the next 5 years in its R&D center in Hyderabad and will continue to develop its BPM capability.
- Seeing the market trend and the customer preference for the subscription-based model, Pegasystems continues to invest in transitioning from legacy on-prem method to cloud-based subscription model.
- It engages its partner ecosystem through an annual event, PegaWorld, where it recognizes its alliance partners (for services, technology and systems integration) for their contribution towards driving client success. This year, it introduced a new category, Pega DX Hero awards, to recognize its clients who, through their automation ideas, solved business, customer, and employee challenges.

Softomotive: RadarView Profile



Organization Overview	Client Case Studies												
<ul style="list-style-type: none"> Active Clients: 7,000+ Patents: N/A Major Releases per Year: 1 Commercial Model: As-a-Service, Subscription (on-premise) Delivery Highlights: UK, US, Greece, India. <div style="display: flex; justify-content: space-around; border: 1px solid #ccc; padding: 5px;"> <div style="border: 1px solid #ccc; padding: 5px; text-align: center;"> <p>USD 499</p> <p>WinAutomation starting price</p> </div> <div style="border: 1px solid #ccc; padding: 5px; text-align: center;"> <p>300+</p> <p>Pre-built Actions</p> </div> </div>	<ul style="list-style-type: none"> Automated part of Reventics' medical claims processing cycle. ProcessRobot was able to run several claim validation processes concurrently on a single machine, thus increasing transaction processing speed by 65%. Transformed Scanlog's order booking process: the robot reads the client's shipping order, opens the PDF, captures 20 datapoints including the pickup and delivery address, and enters details into company's systems. Reduced processing time from 4 minutes to 20 seconds. Automated Technicolor's finance and accounting process, with desktop-based WinAutomation and scaled up with ProcessRobot. Once the team logs into ERP, the bot downloads an Excel and performs analysis. Reduced invoice handling time from 2 hours to 5 minutes. For a top 10 US insurance provider, automated 77% of the new insurance applications process, including evaluation of application, audit, logging, quality control. Also, using analytics performed customer audits instantly. Reduced processing from 5 hours to 12 mins. 												
Products and Modules	Key Partnerships	Sample Clients	Automation Focus										
<ul style="list-style-type: none"> ProcessRobot - RPA Platform WinAutomation - A Desktop Automation Software 	<p>Technology Partners</p> <p>Implementation Partners</p>	<ul style="list-style-type: none"> Reventics Scanlog Technicolor Top 10 US Insurance provider Siemens IBM Xerox JDM Financial Group Fetter Group Vodafone Intel 	<table border="1" style="width: 100%; text-align: center;"> <tr><td style="background-color: #00b050; color: white;">IT Automation</td></tr> <tr><td style="background-color: #00b050; color: white;">Build</td></tr> <tr><td style="background-color: #00b050; color: white;">Run/Maintain</td></tr> <tr><td style="background-color: #00b050; color: white;">Enterprise Automation</td></tr> <tr><td style="background-color: #00b050; color: white;">Contact Center</td></tr> <tr><td style="background-color: #00b050; color: white;">Finance & Accounting</td></tr> <tr><td style="background-color: #00b050; color: white;">HR Processes</td></tr> <tr><td style="background-color: #00b050; color: white;">Procurement</td></tr> <tr><td style="background-color: #00b050; color: white;">Legal / Compliance</td></tr> <tr><td style="background-color: #00b050; color: white;">Industry-specific Automation</td></tr> </table>	IT Automation	Build	Run/Maintain	Enterprise Automation	Contact Center	Finance & Accounting	HR Processes	Procurement	Legal / Compliance	Industry-specific Automation
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- Product Maturity** ★★★★★
- Enterprise Adaptability** ★★★★★
- Innovation Roadmap** ★★★★★

Focus on medium-sized enterprises. Brings best-of-breed capabilities through technology partners. Intends to deepen presence in the US.

Darker color indicates higher automation focus through IA tools ●●●●

Analyst Insights

Product Maturity



- Founded in 2005, Softomotive started with WinAutomation, a desktop robotic product. In 2016, it introduced ProcessRobot, a distributed server-based enterprise RPA platform, with a primary focus on the medium-sized enterprise segment.
- It supports all the major technologies around web browsers, OCR engines, and cognitive services. This includes Microsoft MODI, Google Tesseract, and ABBYY Flexicapture for OCR and Microsoft, Google, and IBM Watson when it comes to cognitive.
- It recently entered a strategic alliance with CaptureFast to enhance the tool's data capturing feature, bringing in editable or noneditable physical or scanned documents into its gamut.
- In terms of security, it supports AES 256bit (data at rest) and TLS1.2 (data in motion) encryption protocols and offers role-based permission and access control. It also comes with security features such as Kerberos authentication and single sign-on (SSO).
- It provides access to performance analytics and helps assess real-time progress of organizational goals, along with ROI calculator.

Enterprise Adaptability



- Softomotive offers a free trial to develop the first robot and comes with intuitive drag-and-drop functionality, which makes it easy to use. It offers the e-learning platform, Softomotive Academy, which is accessible by partners, customers to help develop and deepen their RPA-focused skills.
- ProcessRobot enables scalability by offering a collection of ready-made built-in actions for over 300+ interactions with any application, and allows multiple processes to run on a single bot. Also, its "User Libraries" store user-generated custom actions that can be reused in multiple processes. Its advanced editing tools and debugger that leverage centralized editing further enhances reusability.
- It offers flexible deployment options including on-premises, public cloud (AWS, Azure, Google), private cloud, and any hybrid combination.

Innovation Roadmap



- Last September, Softomotive raised USD 25M in a Series A round of funding, which is utilized to continue global expansion, accelerate the development of its product roadmap with special focus on desktop automation and RPA for mid-sized enterprises.
- It plans to double its team size this year. It recently appointed a new chairman, Guy Berruyer, who brings in experience in successfully leading a company with a subscription software model.
- Though it recently moved its HQ from Athens to London, it continues to deepen its presence in the US and develop a presence in Greece and India, with plans to open offices in Continental Europe and APAC.

UiPath: RadarView Profile



Organization Overview

- Active Clients: 2,700+
- Patents: N/A
- Major Releases per Year: 1
- Commercial Model: As-a-Service, Subscription
- Delivery Highlights: Development team in Bucharest and Romania

USD 200M+ Annual recurring revenue (ARR)	2,500 Employee size
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Client Case Studies

- Deployed UiPath RPA to manage American Fidelity's customer emails. A UiPath Robot opens an email, extracts all text which DataRobot's ML classifies into a correct category for the UiPath Robot to route to the appropriate department. Saved thousands of man-hours.
- UiPath automated Swiss Re's bank account reconciliation process. The UiPath Robot downloads the bank statement and ledger accounts to match the balance and maintains the record for future audit. Cut down reconciliation time from 15 days to 3 days.
- Deployed UiPath Robots to automate Max Healthcare's manual claims process. This required extracting customer claim settlement information available in multiple formats like PDF, scanned images, email, etc. from 28 insurance vendors. Reduced TAT by 50%.
- UiPath automated Morrison Utility Services' process of creating a safety pack (a document folder with schematics and blueprints). It was able to apply to Morrison's SAP systems with no alteration to the host system and became self-sufficient within 6 months.

- Product Maturity ★★★★★
- Enterprise Adaptability ★★★★★
- Innovation Roadmap ★★★★★

Specializes in internal and back-office tasks. Cloud-focused, added SaaS to its portfolio. Expanding to new geos. Joint solutioning with SIs.

Products and Modules

- UiPath Enterprise - RPA Platform
- UiPath Enterprise Cloud Platform – Cloud based RPA Platform

Key Partnerships

Technology Partners

Implementation Partners

Sample Clients

- American Fidelity
- Swiss Re
- Max Healthcare
- Morrison Utility Services
- EDP Valor
- Lombard International
- NTT Communications
- Federal Bank
- Maitland Group
- Australian Unity
- Health Fidelity
- Ladbrokes Coral

Automation Focus

IT Automation
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Industry-specific Automation

Darker color indicates higher automation focus through IA tools ●●●●

Analyst Insights

Product Maturity



- UiPath has been primarily focusing on internal and back-office tasks, including accounting, human resources paperwork, and claims processing. However, with fresh funding of ~USD 1B, it plans to expand its influence in the front-office and customer-facing areas. It recently launched UiPath Enterprise Cloud Platform to tap into the growing trend towards cloud delivery model as majority of enterprises have started using public cloud.
- Computer vision is the key linchpin to its solution architecture, and integrates with third party cognitive services from Google, IBM, Microsoft and ABBYY. Its new AI features, UiPath Invoice and Receipt AI, allow AI to determine the location and extract key information regardless of the document format.
- It is collaborating with SIs on joint solutioning. With Tech Mahindra, it launched an end-to-end ready-to-use cognitive operations automation solution in the area of service desk operations. This is to support a wider and more complex range of offerings as the service desk gets increasingly accessible.
- It is entering into new technology partnerships to enhance AI, BPM and service orchestration capabilities. It became a global reseller of Enate's Robotic Service Orchestration (RSO) platform and partnered with Bonitasoft to offer an integrated platform providing business process automation.

Enterprise Adaptability



- Along with flexible pricing model (on-premise, private/public cloud), it also provides technical resources to set-up CoEs. Additionally, it has an extensive portfolio of free training services for the enterprises.
- It has been in expansion mode both globally and in the EMEA region and opened new offices in 9 countries in 2018 taking its total count to 53 offices globally. It also appointed a new Head of Sales for South Africa to address the increasing demand for RPA in the region.
- Last year, it launched UiPath Go!, a new app store providing immediate access to RPA and AI building-blocks for customers, developers, and partners.
- Additionally, it launched an online community platform, UiPath Connect! to help its community members to interact, share ideas and best practices.

Innovation Roadmap



- UiPath committed USD 20M for 2019 to provide support to AI-focused partners, chatbot companies and global partners to drive innovation and growth.
- It introduced Automation First Immersion Labs program to enable customers/partners to bring their own data and test pre-configured use cases. These Labs were opened in Bucharest and Bangalore in 2018 and plans to open more Labs this year in London, New York City, Seattle and Tokyo.
- UiPath is engaging with academia through its Academic Alliance program to educate people on various automation solutions.
- It is also collaborating with start-ups and launched new competition for start-ups in the CEE region, providing tech and marketing support to the winner.
- In 2019, hosted two Hackathons in India to encourage RPA developers to generate new automation ideas.



- Product Maturity** ★★★★★
- Enterprise Adaptability** ★★★★★
- Innovation Roadmap** ★★★★★

Specializes in contact center and back-office processes. Strong R&D focus. Continues to strengthen its customer experience capabilities, including VoC.

Organization Overview	Client Case Studies	Products and Modules	Key Partnerships	Sample Clients	Automation Focus										
<ul style="list-style-type: none"> Active Clients: N/A Patents: 1,000 (Data capture, AI, ML, predictive analytics etc.) Major Releases per Year: 1 Commercial Model: Perpetual Licensing, As-a-Service Model Delivery Highlights: Americas, EMEA, and APAC regions <div style="display: flex; justify-content: space-around;"> <div style="border: 1px solid gray; padding: 5px;">USD 800M Customer Engagement revenue, 2018</div> <div style="border: 1px solid gray; padding: 5px;">8% Customer Engagement, YoY growth</div> </div>	<ul style="list-style-type: none"> Implemented Verint Workforce Management solution within ABN AMRO's 24-hour Advise Service Center to expedite customer query resolution. The tool helped to forecast, plan, and monitor agent's availability in real-time, improving employee satisfaction from 60% to 80%. Implemented Desktop and Process Analytics in a non-profit health insurer in the US to assess employees' time-spend and fed data into Performance Management to generate key performance metrics. Increased utilization by 3.5%, saving USD 1.25M in a year. Deployed Verint Employee Desktop for a grocery and general merchandising retailer's 2 customer service centers. This provided agents an omnichannel customer service experience by bringing together multiple business applications, thereby, reducing AHT. Used Verint Employee Desktop and implemented Verint Workforce Management™ to improve the service levels of a Fortune 500 energy services company. The contact center "first-person" resolution consolidated 13 different systems into a single desktop. 	<ul style="list-style-type: none"> Verint Robotic Process Automation - RPA tool Verint Workforce Optimization - Includes Verint Workforce Management which is used in tandem with Verint Performance Management, and Verint Desktop and Process Analytics. 	<p>Technology Partners</p>	<ul style="list-style-type: none"> ABN AMRO Non-profit health insurer in the US Grocery and general merchandising retailer A Fortune 500 energy services company Aegon bpost City of Tallahassee Utilities Green Shield Canada The Guardian Life Insurance Company of America 	<table border="1"> <tr><td>IT Automation</td></tr> <tr><td>Build</td></tr> <tr><td>Run/Maintain</td></tr> <tr><td>Enterprise Automation</td></tr> <tr><td>Contact Center</td></tr> <tr><td>Finance & Accounting</td></tr> <tr><td>HR Processes</td></tr> <tr><td>Procurement</td></tr> <tr><td>Legal / Compliance</td></tr> <tr><td>Industry-specific Automation</td></tr> </table>	IT Automation	Build	Run/Maintain	Enterprise Automation	Contact Center	Finance & Accounting	HR Processes	Procurement	Legal / Compliance	Industry-specific Automation
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Darker color indicates higher automation focus through IA tools ●●●●

Analyst Insights

Product Maturity



- Verint Systems specializes in contact center and back-office processes such as address change, claims processing, billing, underwriting, and other high-volume tasks. Its solutions revolve around workforce management, self-service bots for customers, voice of the customer (VoC), and compliance and fraud. Its Customer Engagement portfolio comprises of 65% of the revenue while remaining is derived from Cyber Intelligence.
- Its RPA includes patented image recognition and OCR that can run business processes across multiple applications and doesn't require any integration. The solution is also scalable and can quickly respond to peak workloads by adding more robots.
- As customers are increasingly choosing to engage via text-based channels, Verint Systems strengthens its customer experience capability. It recently added anomaly detection to its VoC solutions (built upon Verint Text Analytics and Verint Speech Analytics) to help companies automate insights.
- It also offers virtual assistant that uses AI and ML, bringing contextual capabilities to predict and personalize the interaction.
- It recently launched AI Blueprint to help enterprises identify the business need for AI and lay out roadmap of the resources required for implementation.

Enterprise Adaptability



- Verint Systems offers an open platform which not only easily integrates into enterprise's technology environment but is also compatible with other call center communications solutions, giving enterprises the flexibility to select the solution that suits best for their contact centers.
- It also offers flexible deployment models: public cloud (SaaS), private cloud, and/or perpetual license approach, or a combination of these.
- It provides a dedicated team of technicians for on-site training, implementation support, consulting, managed services, and maintenance. It also leverages its partner network including distributors, SIs, VARs, and OEM partners, which account for half of its sales.
- It offers community experience to its customers through Telligent Community, which it offers through its acquisition of Telligent way back in 2015.

Innovation Roadmap



- Verint Systems has a robust R&D team, consisting of one-third of 6,100 professionals spread across the US, Israel, the UK, Ireland, Netherlands, Hungary, and Indonesia. It has invested more than USD 1B in R&D over the last decade, with a USD 210M budget in 2018, a 10% YoY growth.
- It also has a strong IP portfolio with close to 1,000 patents and patent applications across data capture, AI, ML, unstructured data analytics, predictive analytics, and automation.
- It organizes an annual user conference, Engage, where it provides updates on its product capabilities and provides a platform to interact with company executives, partners, and customers. This helps gather customer experiences and their points-of-view on the adoption of automation tools.

WorkFusion: RadarView Profile



- Product Maturity ★★★★★
- Enterprise Adaptability ★★★★★
- Innovation Roadmap ★★★★★

Specializes in enterprise-level automation. Drives partner enablement. Offers free training and platform access to jumpstart customer.

Organization Overview	Client Case Studies												
<ul style="list-style-type: none"> Active Clients: N/A Patents: N/A Major Releases per Year: 2 Commercial Model : As-a-Service, Subscription (on-premise) Delivery Highlights: Teams in the US, Europe and India <div style="display: flex; justify-content: space-around; border: 1px solid #ccc; padding: 5px;"> <div style="text-align: center;">40,000+ Downloads of RPA Express</div> <div style="text-align: center;">20,000+ Students in Automation Academy</div> </div>	<ul style="list-style-type: none"> Implemented WorkFusion SPA to automate a US coverage administrator's healthcare appeals experience. It used robotics and OCR to extract data from emails and ML to classify and route requests. Reduced average routing time from 15 minutes to 3 minutes. Implemented WorkFusion SPA in a US bank to manage over 1 million emails received from commercial clients annually. SPA used OCR and RPA to assess emails and attachments and its native AI to classify and either to execute or route requests. Saved 89% of manual effort. To automate the KYC process of an Indian bank, designed an automated workflow to receive, validate and extract customer data from up to 10 document types, verify and check it against more than 100 rules, regulations. Achieved 70% productivity gains. To automate the trade finance process of a private sector bank in India, implemented RPA and cognitive automation to accept, classify and extract data and updated systems accordingly. This reduced error by 5% and achieve 55% productivity gains. 												
Products and Modules	Key Partnerships	Sample Clients	Automation Focus										
<ul style="list-style-type: none"> Smart Process Automation (SPA) - AI-driven RPA RPA Express Pro – new version RPA Express - Free RPA tool 	<p>Technology Partners</p> <p>Implementation Partners</p>	<ul style="list-style-type: none"> A major US healthcare coverage administrator One of the top 10 banks in the US A large private sector bank in India A private sector bank in India Deutsche Bank Standard Bank SIX Financial Information Polaris Transportation Group R-Path Automation 	<table border="1" style="width: 100%; text-align: center;"> <tr><td style="background-color: #00b050; color: white;">IT Automation</td></tr> <tr><td style="background-color: #00b050; color: white;">Build</td></tr> <tr><td style="background-color: #00b050; color: white;">Run/Maintain</td></tr> <tr><td style="background-color: #00b050; color: white;">Enterprise Automation</td></tr> <tr><td style="background-color: #00b050; color: white;">Contact Center</td></tr> <tr><td style="background-color: #00b050; color: white;">Finance & Accounting</td></tr> <tr><td style="background-color: #00b050; color: white;">HR Processes</td></tr> <tr><td style="background-color: #00b050; color: white;">Procurement</td></tr> <tr><td style="background-color: #00b050; color: white;">Legal / Compliance</td></tr> <tr><td style="background-color: #00b050; color: white;">Industry-specific Automation</td></tr> </table>	IT Automation	Build	Run/Maintain	Enterprise Automation	Contact Center	Finance & Accounting	HR Processes	Procurement	Legal / Compliance	Industry-specific Automation
IT Automation													
Build													
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Enterprise Automation													
Contact Center													
Finance & Accounting													
HR Processes													
Procurement													
Legal / Compliance													
Industry-specific Automation													

Darker color indicates higher automation focus through IA tools ●●●●

Analyst Insights

Product Maturity



- WorkFusion offers enterprise-level automation with self-learning RPA, cognitive and workflow in one platform. It automates shared services, F&A, and HR which cuts across processes and roles involved in banking and financial services, insurance and healthcare.
- It offers a low-/no-code platform that allows business users to configure complex processes with a drag-and-drop feature. It also comes with preloaded process templates as well as pre-built robotic, OCR, cognitive, and exception-handling components that help configure custom workflows.
- It offers centralized governance by bringing in existing operations into automation processes, thus ensuring maximum control, compliance, and auditability. Moreover, its predictive analytics feature allows the user to further optimize cost and capacity by providing a dashboard view.
- It comes with native quality control capability, AutoQC, which helps auto escalate the task to a human for validation if the SPA model identifies any anomaly while recognizing or inferring a pattern in the data. This human validation, in turn, is used to re-train the ML model, thus improving accuracy.
- In terms of security, SPA offers a vault feature, which centrally stores bot and admin credentials and allows role-based access control.

Enterprise Adaptability



- With its plug-and-play feature, it is easy to set up and offers a solution that is portable, repeatable, and cost-effective when applied across functions.
- It offers 1-6-12 go-live program, aiming to implement solution within 12 weeks' time-frame, involving 1 day of feasibility assessment and 6 weeks to POC.
- WorkFusion SPA can be deployed on-premise, in the cloud or in a hybrid on-premise/cloud model, without requirements of GPUs or custom chips.
- Though OCR is included in the standard SPA license which handles a global language set, it allows users the option to bring their own OCR engine.
- It also offers RPA Express, a free version that allows users to automate web, desktop, and applications. This provides users a feel for the RPA tool. Its crowdsourcing product, Smart Crowd, provides labor agility by allowing enterprises to source labor without the need to hire.

Innovation Roadmap



- WorkFusion continues to innovate its RPA platform, and recently introduced a new version of its RPA software product, RPA Express Pro. This advanced RPA version allows enterprises to scale unattended bots and automate more complex, higher volume processes.
- It organizes Hackathons which challenge participants to create an original ML model and help extract information from invoices. Additionally, it also organizes annual conference – Ascend Summit, which brings together industry thought leaders to lay out the future roadmap.
- In May 2018, it raised USD 50M in Series E funding, bringing the company's total investment to USD 118M. It plans to utilize these funds for expansion under the enhanced leadership team which has some change of roles and new appointments, bringing experience from Accenture and Microsoft.

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