FORRESTER®

The Forrester Wave™: Digital Process Automation Service Providers, Q3 2018

The 11 Providers That Matter Most And How They Stack Up

by Rob Koplowitz
September 21, 2018

Why Read This Report

In our 19-criteria evaluation of digital process automation (DPA) service providers, we identified the 11 most significant ones — Accenture, BP3, Cognizant, HCL, Incessant Technologies, Infosys, Perficient, Persistent Systems, Princeton Blue, Virtusa, and Wipro — and researched, analyzed, and scored them. This report shows how each provider measures up and helps application development professionals select the right provider for their needs.

Key Takeaways

Wipro, BP3, And Cognizant Lead The Pack
Forrester's research uncovered a market in which Wipro, BP3, Cognizant, Accenture, and Infosys are Leaders; Princeton Blue, Virtusa, Persistent Systems, HCL, Perficient, and Incessant Technologies are Strong Performers.

Strategy, Design, And Scale Are Key Differentiators
As existing DPA delivery techniques become outdated and less effective, strategy consulting, change management, and customer experience capabilities will dictate which providers will lead the pack. Vendors that can provide these capabilities position themselves to successfully deliver DPA in service of digital transformation to their customers.

The Forrester Wave™: Digital Process Automation Service Providers, Q3 2018

The 11 Providers That Matter Most And How They Stack Up

by Rob Koplowitz
with Christopher Mines, Allison Vizgaitis, and Andrew Reese
September 21, 2018

Table Of Contents

Related Research Documents

The Forrester Wave™: Digital Process Automation Software, Q3 2017

Now Tech: Digital Process Automation Service Providers, Q3 2018

Refocus Process Automation To Rescue Your Digital Transformation

Share reports with colleagues.
Enhance your membership with Research Share.

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

The Forrester Wave™: Digital Process Automation Service Providers, Q3 2018
The 11 Providers That Matter Most And How They Stack Up

September 21, 2018

Top Firms Support Digital Transformation, Not Implementation

The goals for process initiatives are shifting from cost reduction to digital transformation. This has gigantic implications. With digital transformations at many companies in trouble, and executives recognizing that process automation is critical to success, process initiatives have become strategic imperatives instead of tactical projects. Service providers can offer clients valuable skills and guidance to navigate this sea change. This represents a stark contrast from our last evaluation, The Forrester Wave™: BPM Service Providers, Q4 2016, when technology implementation dominated the assessment criteria.

As a result of these trends, prospective clients of DPA service providers should look for providers that offer:

› **A proven track record of engagement at a strategic level.** Process professionals see a clear connection to digital transformation, but they may not even have a seat at the table when the business defines its strategy. Professional services firms that engage at the executive level and understand how process drives change have a unique opportunity to apply technology in the context of strategic objectives instead of just affecting business process within the context of a technology project.

› **An approach that places customer journey at the forefront.** As journey mapping becomes more prevalent for visualizing the customer, employee, citizen, or patient experience, the connection to process and automation becomes clear. Vendors that can lead with a focus on mapping journeys to process discovery and technology automation offer unique capabilities to bridge experience and technology. This requires a substantial commitment to design capabilities that are generally associated with digital agencies.

› **Expertise to support wide process shifts that require significant change management.** Traditional business process management (BPM) and modern DPA have markedly different scales. Where organizations might run a dozen BPM applications, DPA development can run onto hundreds, or even thousands, of applications.[1] This requires technologies and methodologies that empower business users to take a very active role in defining process applications, and in some cases developing them. Such initiatives require professional services firms to support both broad enablement and the change management that accompanies it, a fundamentally different approach from what complex BPM implementations require.

Evaluation Summary

Our Forrester Wave evaluation highlights the role of service providers in elevating process automation initiatives from tactical, cost-saving efforts to critical components of a digital transformation strategy. Leaders in this Forrester Wave offered strength across strategy, design, technology, and change management. Many of the Strong Performers have embraced partnerships with best-of-breed-service providers to create a complete offering and may represent a better option for some organizations.

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

The Forrester Wave™: Digital Process Automation Service Providers, Q3 2018
The 11 Providers That Matter Most And How They Stack Up

September 21, 2018

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

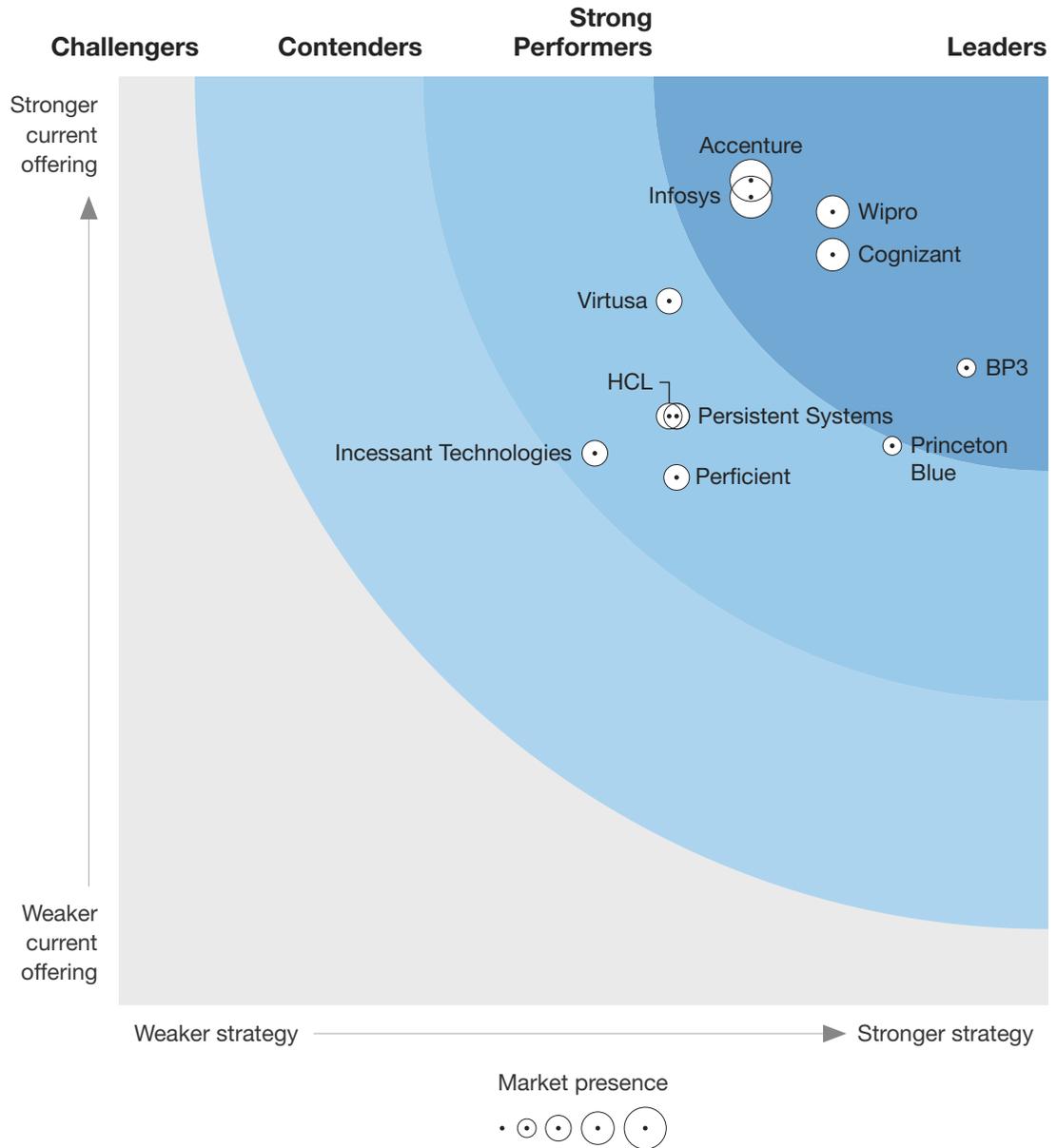**FIGURE 1** Forrester Wave™: Digital Process Automation Service Providers, Q3 2018

THE FORRESTER WAVE™

Digital Process Automation Service Providers

Q3 2018

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

September 21, 2018

The Forrester Wave™: Digital Process Automation Service Providers, Q3 2018
The 11 Providers That Matter Most And How They Stack Up

FIGURE 2 Forrester Wave™: Digital Process Automation Service Providers Scorecard, Q3 2018

	Forrester's weighting	Accenture	BP3	Cognizant	HCL	Incessant Technologies	Infosys	Perficient	Persistent Systems	Princeton Blue	Virtusa	Wipro
Current offering	50%	4.44	3.43	4.04	3.17	2.97	4.35	2.84	3.17	3.01	3.79	4.27
Breadth of services	33%	3.80	3.80	4.10	3.00	3.10	4.20	3.00	3.00	3.40	3.00	3.80
Implementation and delivery models	33%	4.50	3.50	3.00	3.50	3.50	4.50	2.50	3.50	4.00	4.00	4.00
Expertise and certifications	34%	5.00	3.00	5.00	3.00	2.32	4.34	3.00	3.00	1.66	4.34	5.00
Strategy	50%	3.40	4.56	3.84	2.96	2.56	3.40	3.00	3.00	4.16	2.96	3.84
Market strategy and vision	20%	5.00	5.00	3.00	3.00	3.00	3.00	3.00	3.00	5.00	3.00	3.00
Process technology partnerships	22%	3.00	3.00	5.00	3.00	1.00	3.00	3.00	3.00	3.00	3.00	5.00
Thought leadership	16%	3.00	5.00	3.00	3.00	3.00	3.00	3.00	3.00	5.00	3.00	3.00
Rates and pricing strategy	20%	3.00	5.00	5.00	5.00	3.00	5.00	3.00	3.00	3.00	5.00	5.00
Employee experience	22%	3.00	5.00	3.00	1.00	3.00	3.00	3.00	3.00	5.00	1.00	3.00
Market presence	0%	4.43	1.66	3.66	2.32	2.34	4.32	2.32	2.34	1.68	3.00	3.66
Active DPA clients	33%	3.00	3.00	5.00	3.00	1.00	5.00	3.00	1.00	1.00	3.00	3.00
DPA headcount	33%	5.00	1.00	3.00	3.00	3.00	5.00	3.00	3.00	1.00	3.00	5.00
Global presence	34%	5.00	1.00	3.00	1.00	3.00	3.00	1.00	3.00	3.00	3.00	3.00

All scores are based on a scale of 1 (weak) to 5 (strong).

FORRESTER®

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

September 21, 2018

The Forrester Wave™: Digital Process Automation Service Providers, Q3 2018
The 11 Providers That Matter Most And How They Stack Up

Vendor Offerings

Forrester included 11 vendors in this assessment: Accenture, BP3, Cognizant, HCL, Incessant Technologies, Infosys, Perficient, Persistent Systems, Princeton Blue, Virtusa, and Wipro (see Figure 3).

FIGURE 3 Evaluated Vendors And Offerings

Vendor
Accenture
BP3
Cognizant
HCL
Incessant Technologies
Infosys
Perficient
Persistent Systems
Princeton Blue
Virtusa
Wipro

Vendor Profiles

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

Leaders

› **Accenture aligns strategy consulting with strong design and technology services.** Accenture brings broad capabilities to DPA, including deep experience in business strategy consulting at the executive level that drives process automation naturally. As such, the firm is well positioned for driving a strategy-first conversation on digital transformation; reference customers indicated that they were likely to use Accenture as a business strategy consulting partner. In addition, Accenture maintains a digital agency (Accenture Digital Agency) separately from its technology arm. With

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

The Forrester Wave™: Digital Process Automation Service Providers, Q3 2018
The 11 Providers That Matter Most And How They Stack Up

September 21, 2018

those pieces in place, it can help clients drive meaningful transformation, particularly at large, complex organizations. In addition, Accenture has deep vertical industry expertise and prebuilt models that reduce project risk.

Some potential clients should examine these strengths critically, however: Accenture prices its services at a premium that could be daunting outside of complex digital transformation initiatives.

› **BP3 maintains a laser focus on leveraging process as a business differentiator.** BP3 is smaller than many of the vendors in this analysis but makes up for it through focus. It hires very experienced process and technology professionals and has very low employee turnover. With deep experience in process, BP3 is keenly aware of the expanding role process plays in driving automated customer and employee journeys and has taken an approach to technology that helps companies address not only deep, complex processes but also the long tail of operational processes that transformation initiatives often ignore. Compared with those of other vendors, BP3's reference customers were more satisfied with project performance and on-time, on-budget delivery. BP3 also brings value in the form of proprietary IP — most notably its Brazos framework, which supports customer experience (CX) design across both web and mobile.

While BP3 shines in process and technology expertise, it offers a relatively narrow scope of services, so it isn't going to be your firm's primary strategy consulting or design partner. It will do good strategy and design work within the constraints of a DPA project, but not the other way around.

› **Cognizant brings strong design capabilities and a focus on end-to-end automation.** Cognizant maintains a wide array of technology vendor relationships: Appian, IBM, and Pegasystems for deep process initiatives; Red Hat for those that prefer open source; and vendors like K2 and Newgen for wide deployments. With a deep bench of certified professionals across a spectrum of technologies, it can address the DPA technology needs of most organizations. In addition, Cognizant has a strong dedicated design team that operates independently but collaborates with DPA and other practices. Forrester's CX research rates this design team along with best-in-class dedicated design firms. Cognizant also offers significant assets in the form of prebuilt IP and maintains innovation centers to support next-generation IP development.

Cognizant reference customers indicated that they used its services to drive strategy mostly within the scope of DPA projects. They also expressed concern about completing projects within budget, an important consideration in light of the complexities and dependencies end-to-end engagements involve.

› **Infosys excels in DPA delivery, while looking to become more strategic.** Infosys is a huge technology services provider, and its scale results in numerous strengths. It maintains a large number of process design studios and labs that serve numerous clients across an array of industries. The firm also offers a plethora of rate and pricing options that put it in deep partnership with clients in achieving success. Infosys also has delved deeply into software development; for example, its Nia artificial intelligence (AI) offering is well suited to supporting process initiatives, and it has made deep investments in process-specific IP.

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

The Forrester Wave™: Digital Process Automation Service Providers, Q3 2018
The 11 Providers That Matter Most And How They Stack Up

September 21, 2018

While Infosys maintains significant resources in strategy and design, its DPA offerings are not as advanced as some other very large vendors in the space. Compared with customers of other vendors, its reference customers were reasonably likely to use the firm as a strategic partner; the case studies Infosys provided supported this.

› **Wipro leverages unique software assets.** While Wipro maintains a wide array of technology partnerships and a huge bench of resources certified in those technologies, its investment in proprietary technologies that directly support DPA strategies really stands out. The firm leverages its Holmes AI technology in DPA projects and will probably do so more as the technology matures. Also, it is ahead of the game in recognizing and exploiting the shift to wide DPA deployments. Wipro can layer a low-code framework on top of open source jBPM, filling a much-needed gap for jBPM shops that want to expand development to non-technical business users.

While Wipro plays at the scale of the largest vendors in the space and maintains a deep commitment to technology excellence, its positions in strategy consulting and design aren't as strong as some of the other mega-vendors in this market. Compared with customers of other vendors in our analysis, Wipro's were less satisfied with the vendor and its solution, giving lower-than-average scores on overall project satisfaction.

Strong Performers

› **Princeton Blue focuses on delivery and partners for process and strategy expertise.** Focusing solely on DPA, Princeton Blue maintains long-term relationships with customers that have high regard for its capabilities. This vendor focuses on complex technology projects. It has strategic partnerships with technology vendors like Appian, IBM, and Pegasystems, supported with AI and robotic process automation (RPA) technology partnerships to drive complete, end-to-end automation. Princeton Blue is a recognized thought leader in the space, publishing frequently and hosting a conference on DPA. Customer references gave the vendor higher-than-average scores in project satisfaction, as well as on-time, on-budget delivery. Very high scores on Glassdoor are evidence that the company hires experienced professionals — and retains them.

Princeton Blue's weaknesses are tied to its strengths. The firm doesn't do everything and doesn't claim to, partnering to bring the best possible solution teams to clients. To that end, it partners with leading strategy firms and process experts, maintaining its singular focus on delivery.

› **HCL's strength is in technology transformation.** With a very wide technology portfolio across most of the major DPA vendors — including Appian, Pegasystems, IBM, Software AG, and TIBCO, as well as Red Hat to support open source jBPM — HCL is positioned to handle most traditional, deep DPA technology challenges. It has also invested heavily in design capabilities, and while we don't consider it a design-first shop, HCL's design capabilities are impressive within the constraints of DPA initiatives.

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

September 21, 2018

The Forrester Wave™: Digital Process Automation Service Providers, Q3 2018
The 11 Providers That Matter Most And How They Stack Up

While HCL maintains a strong technology footprint, it is not a prominent player in business strategy consulting. It is a better fit for large, complex technology implementations than organizationwide digital transformation.

› **Virtusa excels at industry-specific process transformation.** While Virtusa offers strong technology support, particularly through a deep and long-term partnership with Pegasystems, the firm really shines in process expertise. Where others lead with business strategy, design, or technology, Virtusa leads with industry-specific process insight. Its greatest strength is in banking and financial services, with a team of more than 750 dedicated professionals, while the healthcare, media and entertainment, and insurance practices all have dedicated teams of more than 250. The vast majority of this staff has relevant process certifications. Its client list and references both support its strengths in industry-specific solutions.

Virtusa is weaker in general business strategy and design capabilities. This can be a weakness or a strength depending on a client's needs.

› **Persistent Systems lives at the intersection of CX and process.** Persistent has long-standing relationships with Salesforce and Appian, and its expertise is firmly rooted in understanding and leveraging these technologies to drive differentiated CX. It supports the DPA practice through extensive technology partnerships across AI, robotic process automation (RPA), and low-code vendor offerings. With that in mind, Persistent partners up to augment its technology strengths with strategy and process expertise. KPMG, PwC, and smaller boutique consultancies regularly partner with Persistent to drive end-to-end digital transformation. Persistent also maintains eight process design labs on five continents, where customers can experiment with automating existing customer journeys.

Persistent is not a full-service digital transformation shop, nor does it claim to be. Its technology portfolio also focuses on vendors that seek to drive differentiated customer experiences.

› **Perficient thrives in building long-term relationships.** Perficient is smaller than many of the vendors in this analysis, but it maintains long-term relationships with a number of prominent North American clients. Its approach is to start small, build on early success, and become a trusted partner. With very high client retention, the strategy has proven successful. Its primary DPA technical skills are with IBM, Pega, and Appian, and it has a strong focus on financial services, healthcare, and energy and utilities. While the firm's vertical focus is not as wide as others, its depth is impressive.

Perficient does not maintain process design labs, preferring to take advantage of client design lab space or offer virtual omnichannel support instead. In addition, the depth and breadth of Perficient's DPA technical skills are limited compared to larger competitors.

› **Incessant Technologies focuses on technology excellence and strong strategy chops.** With a very large Pega practice, bolstered by the acquisition of RuleTek, and a smaller Appian practice, Incessant Technologies, an NIIT Technologies company, brings digital transformation technology

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

September 21, 2018

The Forrester Wave™: Digital Process Automation Service Providers, Q3 2018
The 11 Providers That Matter Most And How They Stack Up

experience to its clients. However, it doesn't stop there; client references and case studies demonstrate a strong business strategy focus, as well. Design capabilities are excellent within its DPA projects. Industry focus is fairly evenly split between insurance, financial services, and government.

Incessant Technologies is not as strong in process excellence as it is in other aspects of its offering, with a smaller percentage of certified process professionals than other competitors in this analysis.

Evaluation Overview

The Forrester Wave follows a publicly available methodology that involves screening vendors, detailed questionnaires, and customer reference checks. Find more information about the methodology in the Supplemental Material section of this report.

We evaluated vendors against 19 criteria, which we grouped into three high-level categories:

› **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include strategy consulting, UX design capabilities, delivery methodology, and studios and labs for process design.

› **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated market strategy and vision, partnerships with process technology vendors, though leadership, and employee experience.

› **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's active DPA clients, DPA headcount, and global presence.

Vendor Inclusion Criteria

Forrester included 11 vendors in this assessment: Accenture, BP3, Cognizant, HCL, Incessant Technologies, Infosys, Perficient, Persistent Systems, Princeton Blue, Virtusa, and Wipro. Each of these vendors has:

› A dedicated DPA practice with technology partnerships with vendors in Forrester's DPA Wave.

› A proven track record of delivering process automation in the context of larger digital transformation initiatives.

› Consulting offerings that cover strategy, user experience, and change management, in addition to technology.

› Dedicated IP to accelerate project execution time and support vertical and/or horizontal use cases.

› Relevance to Forrester clients represented in inquiries and client consulting.

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

September 21, 2018

The Forrester Wave™: Digital Process Automation Service Providers, Q3 2018
The 11 Providers That Matter Most And How They Stack Up

Engage With An Analyst

Gain greater confidence in your decisions by working with Forrester thought leaders to apply our research to your specific business and technology initiatives.

Analyst Inquiry

To help you put research into practice, connect with an analyst to discuss your questions in a 30-minute phone session — or opt for a response via email.

Learn more.

Analyst Advisory

Translate research into action by working with an analyst on a specific engagement in the form of custom strategy sessions, workshops, or speeches.

Learn more.

Webinar

Join our online sessions on the latest research affecting your business. Each call includes analyst Q&A and slides and is available on-demand.

Learn more.

Forrester's research apps for iOS and Android.
Stay ahead of your competition no matter where you are.

Supplemental Material

Online Resource

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

The Forrester Wave Methodology

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

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

The Forrester Wave™: Digital Process Automation Service Providers, Q3 2018
The 11 Providers That Matter Most And How They Stack Up

September 21, 2018

In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on a small number of inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors. In accordance with the Forrester Wave™ Vendor Review Policy, Forrester asks vendors to review our findings prior to publishing to check for accuracy.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave document. We evaluated the vendors participating in this Forrester Wave using materials that they provided to us by July 20, 2018 and did not allow additional information after that point. We encourage readers to consider how the market and vendor offerings change over time.

Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors to the best of our ability according to our Forrester Wave™ Incomplete Vendor Participation Policy and publish their positioning along with participating vendors.

Integrity Policy

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

Endnotes

[1] See the Forrester report "The Forrester Wave™: Digital Process Automation Software, Q3 2017."

We work with business and technology leaders to develop customer-obsessed strategies that drive growth.

PRODUCTS AND SERVICES

› Core research and tools
› Data and analytics
› Peer collaboration
› Analyst engagement
› Consulting
› Events

Forrester's research and insights are tailored to your role and critical business initiatives.

ROLES WE SERVE

Marketing & Strategy Professionals	**Technology Management Professionals**	**Technology Industry Professionals**
CMO	CIO	Analyst Relations
B2B Marketing	› Application Development & Delivery	
B2C Marketing	Enterprise Architecture	
Customer Experience	Infrastructure & Operations	
Customer Insights	Security & Risk	
eBusiness & Channel Strategy	Sourcing & Vendor Management	

CLIENT SUPPORT

For information on hard-copy or electronic reprints, please contact Client Support at +1 866-367-7378, +1 617-613-5730, or clientsupport@forrester.com. We offer quantity discounts and special pricing for academic and nonprofit institutions.