VENDOR SELECTION MATRIX™
ROBOTIC PROCESS AUTOMATION SOFTWARE

THE TOP GLOBAL VENDORS 2020

Research In Action

May 2020

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independent research & consulting

FOREWORD

The Vendor Selection Matrix™ is a primarily survey-based methodology for comparative vendor evaluation where 60% of the evaluation is based on a survey of enterprise IT or business decision makers. This is balanced by analyst subject matter experts with input fed by a combination of intensive interviews with software or services vendors and their clients, plus the informed, independent points-of-view - all of which combine to make Research in Action Vendor Selection Matrix™ reports so unique. For this report we interviewed 1,500 IT mangers with budget responsibility in enterprises globally. We selected those vendors which achieved the best evaluations scores from the buyers but disregarded the ones with fewer than 15 evaluations.

Manual processes are found in every business of today. Robotic Process Automation, a market which has experienced tremendous growth but also has stirred some debates about the replacement of the human workforce, consists of a large set of vendors offering attended, unattended and hybrid bots that mimic human actions to complete repetitive tasks and processes. Acquisitions have shaped this market in 2019 and will continue to do so in 2020. Security requirements, improved licensing models, the central control of robots and the challenges of process knowledge has shaped the solution offerings across the vendors.

The creation of smarter digital workers is critical for many enterprises as it allows the existing workforce to shift towards more creative and value add work across many industries. Adoption of process discovery and attended-mode Robotic Process Automation tools will allow for faster and higher quality process turnaround. Skeptics towards the agility and scalability and hesitations towards high implementation costs have been addressed by some of the vendors.

This report will guide you to important Robotic Process Automation trends and will aid you during your initial stage of deciding which vendors could best fit your requirements. There are pros and cons of every vendor and the priority use cases of your automation journey should guide your decision.

Regards,

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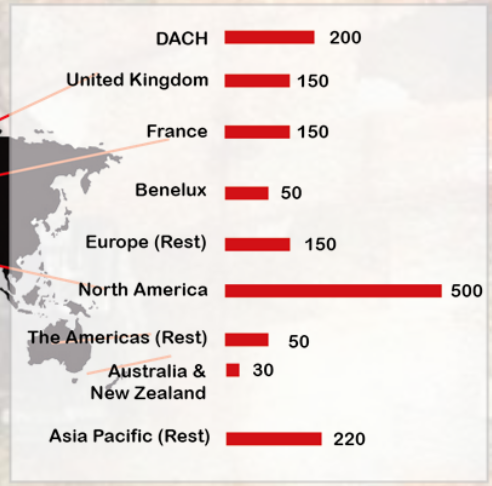
THE VENDOR SELECTION MATRIX™ METHODOLOGY

COUNTRY BREAKDOWN



INDUSTRY BREAKDOWN

Energy	101
Financial Services	254
Government & Non Profits	83
Healthcare & Chemicals	205
Manufacturing	337
Media & Telecoms	121
Consumer Packaged Goods & Retail	115
Technology & Professional Services	175
Travel & Transportation	109
Total	**1,500**

RESEARCH FACTS

100,000+ Data Points

1,500 Enterprise IT Managers

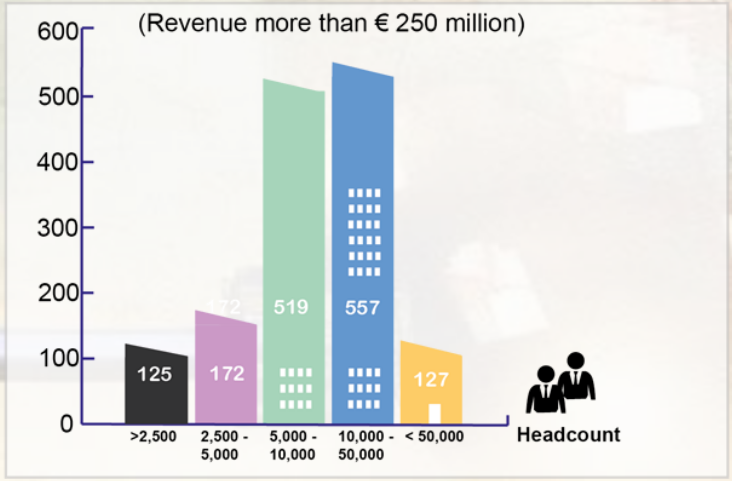
TOP 20 Vendors

30+ Reports in 2020

40% Analyst's Opinion

60% Survey Results

COMPANY SIZE BREAKDOWN



JOB TITLE BREAKDOWN

CIO	152
VP IT	138
VP Operations	135
IT Manager	127
VP Infrastructure	126
IT Operations Manager	113
Project Manager	109
IT Service Manager	107
VP DevOps	94
Change Manager	92
IT Shared Service Manager	87
General Manager	73
IT Supply Manager	53
Test Manager	25
Capacity Manager	23
CFO	17
Manager DevOps	15
Others	14
Total	**1,500**

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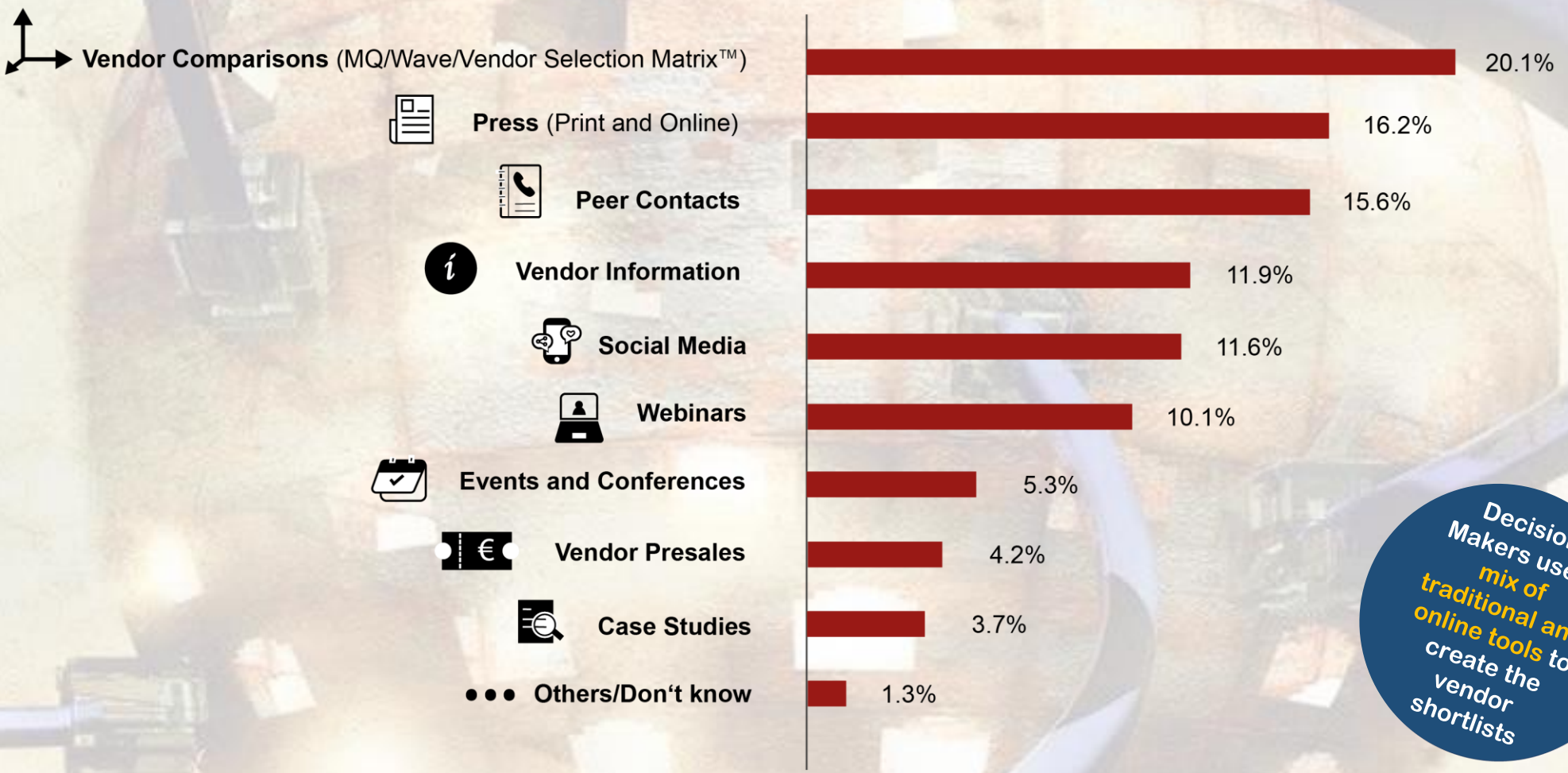
WHAT TOOLS DO YOU USE TO CREATE THE VENDOR SHORTLIST?



Decision Makers use a mix of traditional and online tools to create the vendor shortlists

N = 3,000 Business and IT Managers with budget responsibilities.

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WHAT IS ROBOTIC PROCESS AUTOMATION?

- Robotic Process Automation (RPA) software enable the automation of tasks, processes and procedures which are normally conducted by a human. RPA solutions create software robots that mimic human actions.
- The RPA solutions should include, but are not limited to the following functionality:
  - Work in attended and unattended modes
  - Integrate with a variety of other key areas within the enterprise
  - Broad application across various business areas, processes and industries
  - Scale up or down to meet key requirements
  - Customizations and add-ons possible
  - Various deployment models.
- RPA software includes bots which mimic human actions to complete repetitive and simple tasks and bots which take on more complex tasks requiring cognitive skills such as pattern recognition and decision making. The application of RPA is numerous, with use cases in finance (e.g. revenue recognition), IT (e.g. user admin), HR (e.g. onboarding) to name a few.
- Research In Action has evaluated RPA solutions based on customer needs and requirements and their mentioning of the top vendors and solutions globally during our survey.

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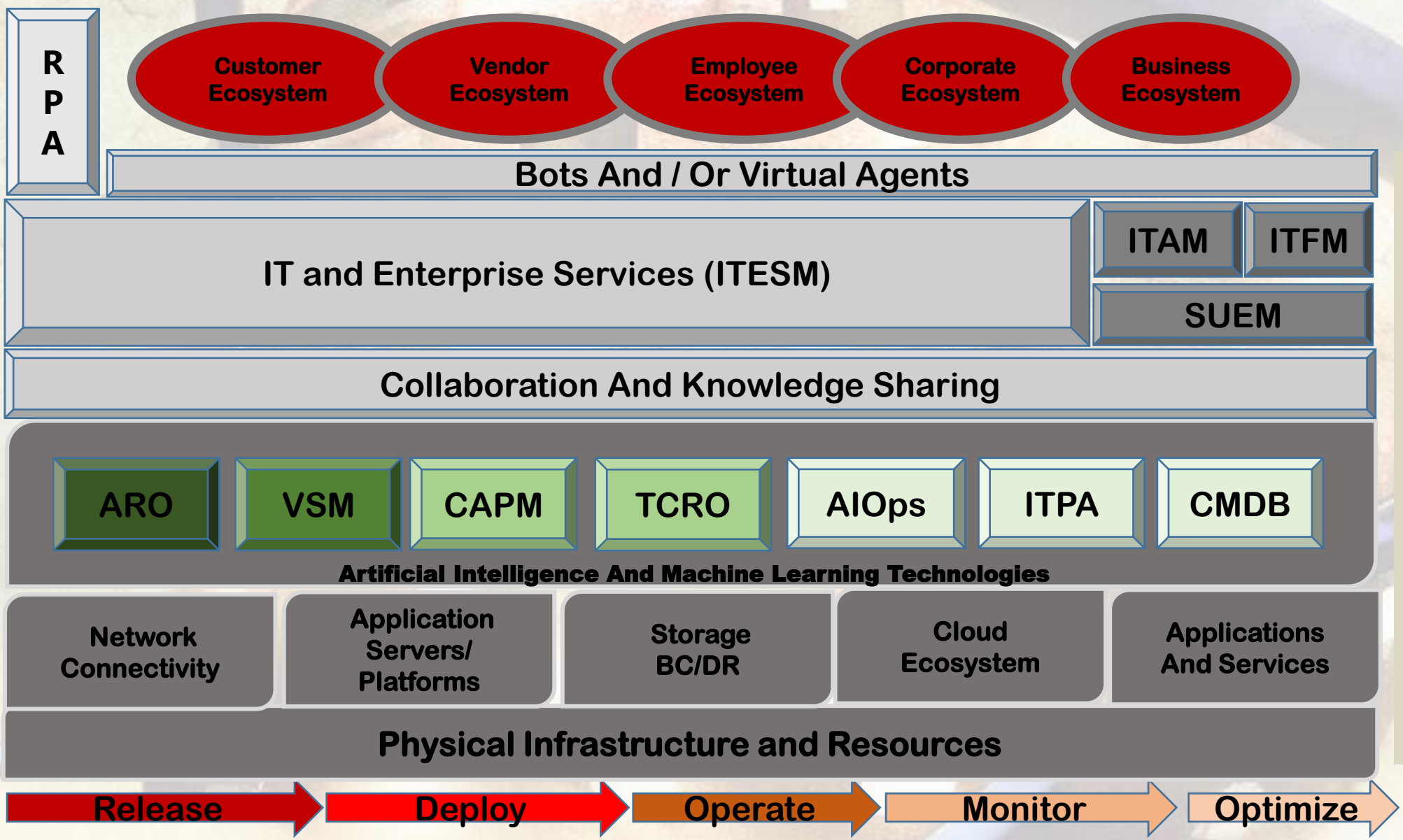
THE IT AUTOMATION MARCHITECTURE



IT Automation is key to IT optimization as it allows to scale fast.

IT Automation is key to Digital transformation as it enables to predict and provide reliable services.

IT Automation will finally shift IT departments from service provider to business partner.

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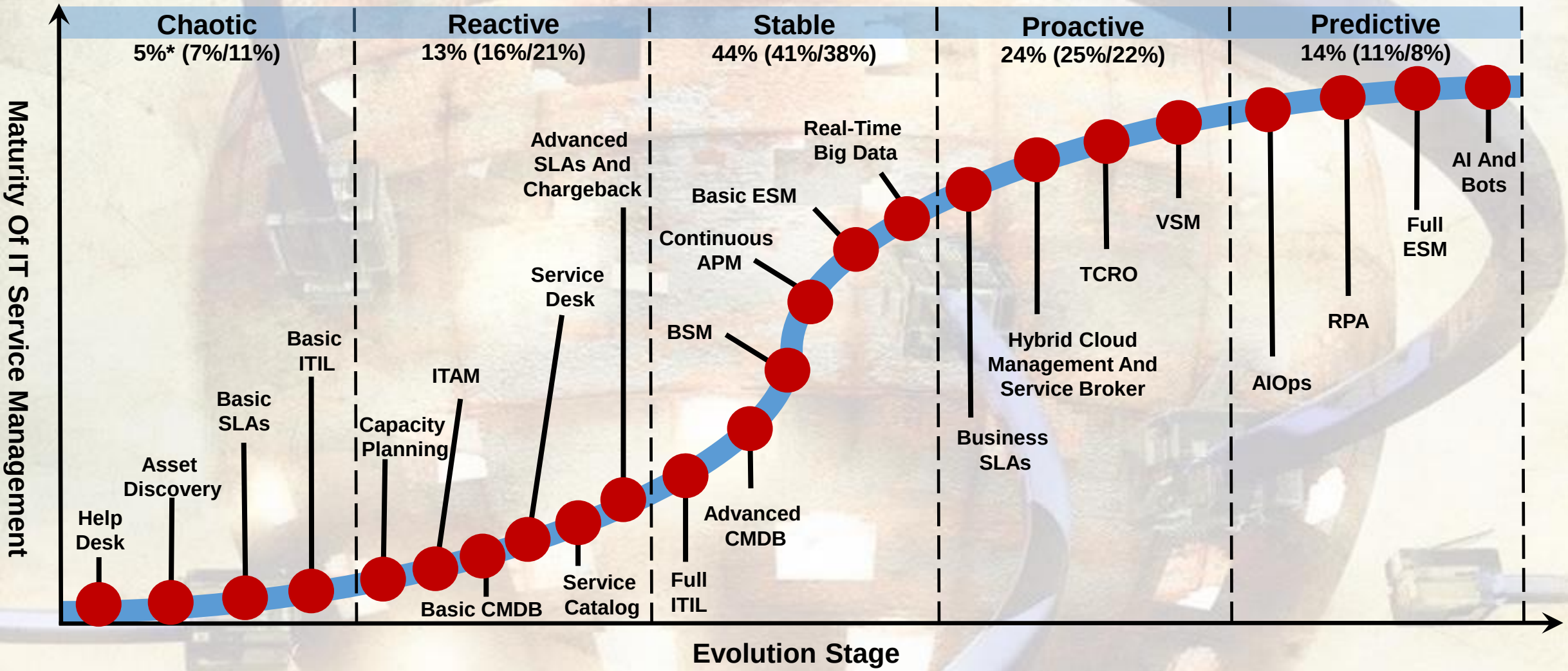
IT AND ENTERPRISE SERVICE MANAGEMENT MATURITY S-CURVE 2020



N = 2,250 IT Managers with budget responsibility.
* Categories show adoption rates, (/) show changes from 2019/2018.

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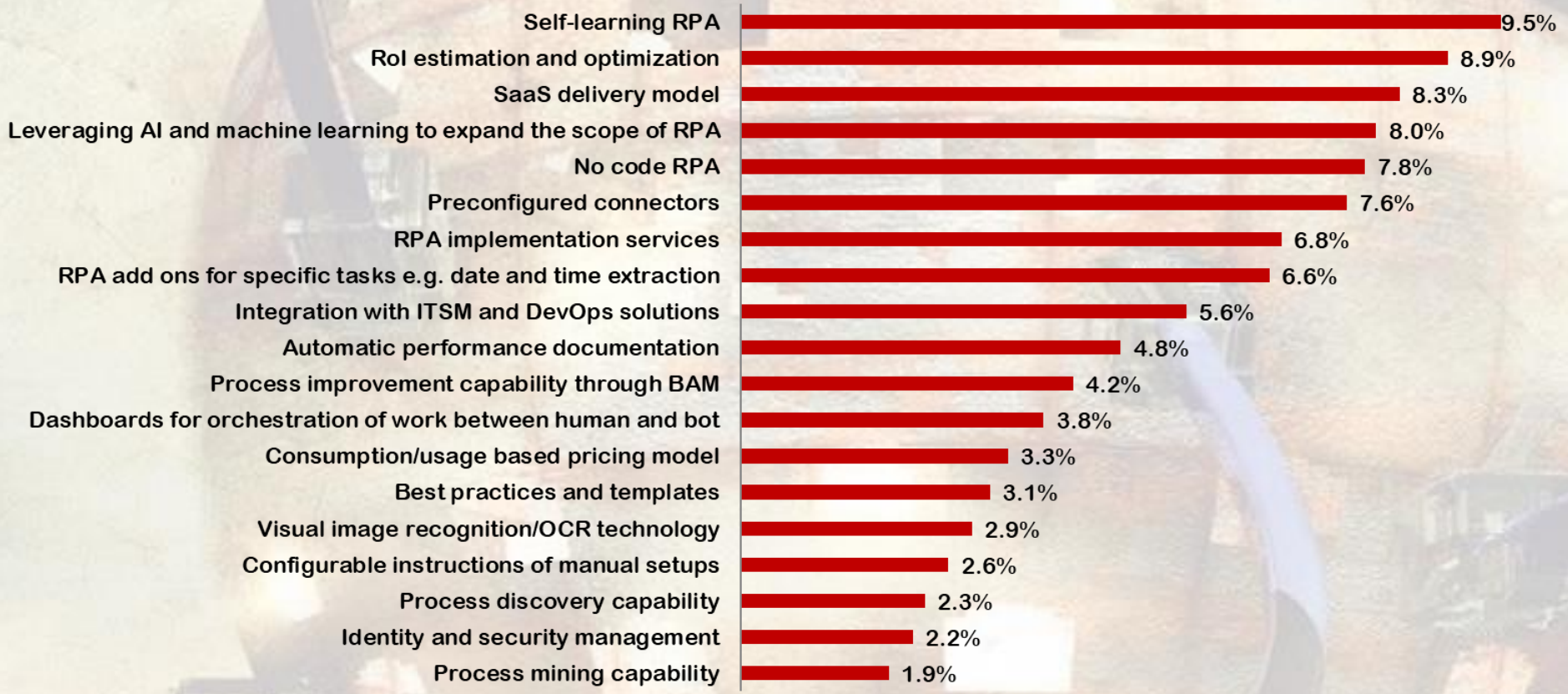
RESEARCH: WHAT IS YOUR NUMBER ONE INVESTMENT AREA RELATED TO ROBOTIC PROCESS AUTOMATION IN 2020?



Self-learning will improve the manual construction of robotic behavior and with it improve the speed of implementations.

The adoption of AI and machine learning will shift process driven RPA into data-driven automation and with it enable the thinking and analysis or intelligent aspect of robotic automation.

Return on investments and scalability are typically stated as challenges around the adoption of RPA. RoI estimations and SaaS delivery models might ease these issues.

N = 1,344 Enterprise IT Managers with budget responsibilities.

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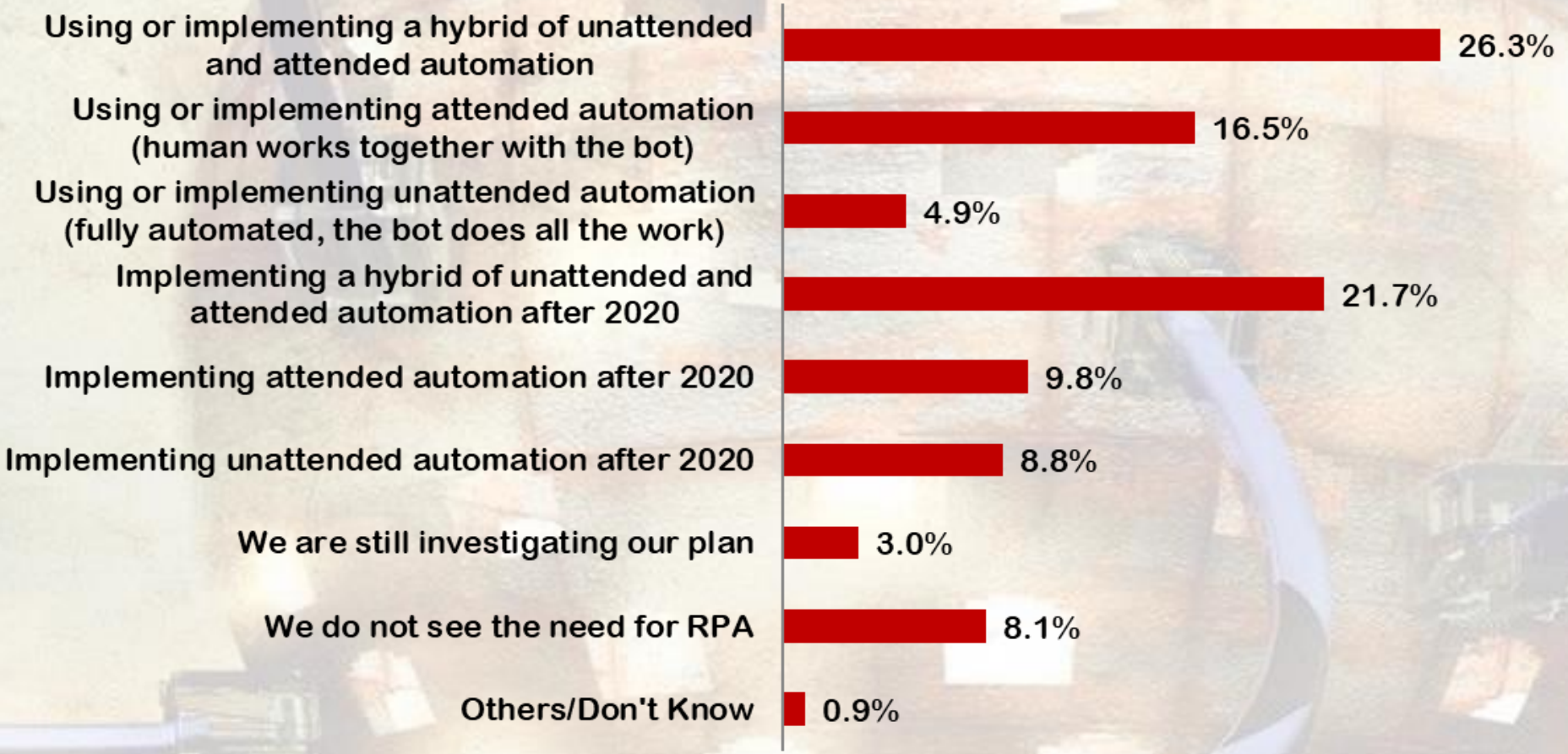
RESEARCH: WHAT TYPE OF ROBOTIC PROCESS AUTOMATION SOLUTION DO YOU HAVE OR ARE YOU PLANNING TO IMPLEMENT?



Today and in the future, having both unattended and attended automation are not mutually exclusive. They both play an important role in an RPA deployment.

N = 1,500 Enterprise IT Managers with budget responsibilities.

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RESEARCH: IN WHAT FUNCTIONAL AREAS ARE YOU ALREADY USING OR PLANING TO USE ROBITIC PROCESS AUTOMATION?

RPA use cases are still centered around service teams such as IT service support and customer service and support functional areas where humans, systems and software robots work in conjunction to enable seamless services and support to employees and customers.

Additional use cases of automating inefficient, manual and clerical tasks are being implemented to optimize work processes.

Reduction in cost within business operations coupled with the need to shift employees towards growing parts of the company will accelerate adoption of RPA in the future.

N = 1,500 Enterprise IT Managers with budget responsibilities.

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INSIGHTS: TOP MARKET TRENDS 2020

- **Automation of manual and repetitive tasks stays top priority.** Business operation teams and IT enterprise teams are adopting RPA to automate repetitive tasks and processes. Examples such processing sales data from core systems into Excel, then presenting the finished report or within IT service desks to automate the provisioning and de-provisioning of assets to free up employee's routine, low value tasks are typical use cases.
- **Disruptive value is being recognized.** Claims of savings in labor and with it in costs of more than 60% over humans and the reduction of errors, as the tasks or processes are automated, accelerates the adoption of this disruptive technology. Enterprise leaders across all functional areas are recognizing the value of RPA and all vendors have experienced solid growth. Decreased cycle times and process risks coupled with rapid profitability increase are key benefits of RPA.
- **AI within RPA is becoming more advanced.** Leveraging Artificial Intelligence and the continuous development of processing increasingly complex data allows for the emulation of human level decision making. Some vendors are receiving funding to accelerate their development in these areas.
- **Employee resistance to adopt RPA can be overcome.** A significant amount of organizations are still hesitant with adopting RPA within business or IT functions due to employee resistance as the introduction of RPA will bring changes to employees and their responsibilities. An initial path starting and automating small and highly manual processes proofing quick wins will be needed to build momentum with key stakeholders and employees to overcome resistance. Most vendors offer free versions allowing for proof-of-concepts and current per-bot licensing models make it possible to invest into RPA one bot at the time.

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INSIGHTS: TOP MARKET TRENDS 2020

- **Training, services and support will become more important over time.** RPA does not interfere with existing system of records or business applications and therefore does not require a lot of integration work. However, to leverage RPA software, individuals and teams must be trained so that deployment and implementation are meeting the expectations. To implement RPA typically involves “citizen developer” (a term first coined in 2018) which are individuals who are very close to the enterprise's operations and can determine the best use cases to leverage RPA software. These citizen developers must be trained and equipped with skills and capabilities to implement successful RPA projects.
- **Center of Excellence (COE) for Robotic Process Automation are essential.** Furthermore, citizen developers, IT oversight, security, mobile app development, other team members and topic owners should assemble into COEs to accelerate the path to innovation. This team should own the RPA lifecycle and the ongoing expansion and maintenance. Without such a COE, there might be a disconnect between the different teams in IT and business personnel regarding the level of concern over for example security and governance. RPA control rooms or management consoles which support such COEs are necessary.

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VENDOR SELECTION MATRIX™ – ROBOTIC PROCESS AUTOMATION: THE TOP GLOBAL VENDORS 2020

VENDOR NAME	PRODUCT(S)
ANOTHER MONDAY[1]	AM Ensemble
AUTOMATION ANYWHERE	Automation Anywhere Enterprise (RPA)
AUTOMATIONEDGE[1]	AutomationEdge Robotic Process Automation
BLUE PRISM	Blue Prism v6.7 including Blue Prism Cloud
CONTEXTOR[1]	Acquired by SAP, now called SAP Intelligent RPA
CORTEX	Cortex Intelligent Automation
DATAMATICS	TruBot
HELPSYSTEMS	Automate Desktop, Automate Plus, Automate Ultimate
JIDOKA	Acquired by Appian
KOFAX[1]	Kofax RPA
KRYON	Kryon Full Cycle Automation
NICE[1]	NICE Robotic Automation
NINTEX	Nintex Workflow
PEGASYSTEMS[1]	Pega Robotic Process Automation
SERVICETRACE	ServiceTrace XceleratorOne
SOFTOMOTIVE	WinAutomation, ProcessRobot
UIPATH	UiPath Automation Platform
WORKFUSION	Intelligent Automation Cloud

This listing is alphabetical and includes all relevant Robotic Process Automation solutions which have been part of the survey.

One additonal vendor with a solution in the RPA space but not included in this research due to timing of the survey is Micro Focus.

[1] These vendors did not provide a direct briefing to the Research In Action analysts.

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VENDOR SELECTION MATRIX™ – ROBOTIC PROCESS AUTOMATION: THE TOP GLOBAL VENDORS 2020 - QUICK FACTS

VENDOR NAME	STAFF	REVENUE[1]	GROWTH	GOOD TO KNOW
ANOTHER MONDAY	< 200	< $20 m	N.A.	Enables the future of work.
AUTOMATION ANYWHERE	> 2,500	> $250 m	> 30% p.a.	Accelerates the digital worker strategy.
AUTOMATIONEDGE	< 100	< $10 m	N.A.	Automates across front, middle and back-office.
BLUE PRISM	< 1,000	< $250 m	> 30% p.a.	Blue Prism connected-RPA accelerates the digital workforce.
CONTEXTOR		Part of SAP		Contextor is now part of SAP and will help automate SAP applications.
CORTEX	< 100	< $20 m	> 30% p.a.	Cortex intelligently automates for outcomes.
DATAMATICS	> 10,000	< $50 m	> 30% p.a.	Datamatics drives intelligent automation by leveraging its patents.
HELPSYSTEMS	< 1,000	< $50 m	< 20% p.a.	HelpSystems is targeting mid-market with additional focus towards security automation.
JIDOKA		Part of Appian		Appian has acquired Jidoka to accelerate its RPA presence.
KOFAX	< 1,500	< $150 m	N.A.	Kofax automates and digitally transform end-to-end business processes.
KRYON	< 250	< $50 m	> 30% p.a.	Kryon automates the automation with process discovery.
NICE	< 6,500	> $1,600 m	N.A.	Delivers attended automation for human efficiency.
NINTEX	< 600	< $200 m	< 20% p.a.	Nintex automates sophisticated process and workflow apps fast.
PEGASYSTEMS	N.A.	N.A.	N.A.	Pegasystems offers a digital transformation suite.
SERVICETRACE	< 100	< $20 m	> 30% p.a.	ServiceTrace enables to complete RPA projects with one tool.
SOFTOMOTIVE	< 250	< $50 m	> 30% p.a.	Softomotive empowers people and enterprises with a simplified automation journey.
UIPATH	> 2,000	< $400 m	> 30% p.a.	UiPath tackles any kind of automation problem.
WORKFUSION	< 500	< $100 m	> 30% p.a.	WorkFusion leverages its Artificial Intelligence DNA for intelligent automation.

[1] In the Robotic Process Automation software market.

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VENDOR SELECTION MATRIX™ – ROBOTIC PROCESS AUTOMATION: THE TOP GLOBAL VENDORS 2020 – ADDITIONAL FACTS

VENDOR NAME	FREE VERSION	PRICING	RPA MARKETPLACE
ANOTHER MONDAY	30 DAY FREE TRIAL	N.A.	YES
AUTOMATION	30 DAY FREE TRIAL	PER PROCESS	YES
AUTOMATION EDGE	N.A.	N.A.	YES
BLUE PRISM	YES	TERM LICENSING ON A PER DIGITAL WORKER BASIS	YES
CONTEXTOR	NO	N.A.	ACQUIRED BY SAP
CORTEX	NO	TERM AND PERPETUAL, ON-PREMISE AND HOSTED, PER PROCESS COMPLEXITY, PER BUNDLE AND ENTERPRISE LICENSE	YES
DATAMATICS	30 DAY FREE TRIAL	PER BOT	NO
HELPSYSTEMS	30 DAY FREE TRIAL	SUITE	YES
JIDOKA	14 DAY FREE TRIAL	N.A.	ACQUIRED BY APPIAN
KOFAX	90 DAY FREE TRIAL	N.A.	YES
KRYON	ENTERPRISE OR COMMUNITY	SUITE OR BUNDLE MODEL	SOON
NICE	YES	N.A.	NO
NINTEX	30 DAY FREE TRIAL	PER AUTOMATED PROCESS	NO
PEGASYSTEMS	30 DAY FREE TRIAL	N.A.	N.A.
SERVICETRACE	YES	PER BOT, PAY-PER-USE, PER PROCESS	YES
SOFTOMOTIVE	30 DAY FREE TRIAL	WINAUTOMATION - PER-USER/PER MACHINE ANNUAL LICENSE SUBSCRIPTION; PROCESSROBOT - PER BOT	SOON
UIPATH	UIPATH COMMUNITY EDITION	PER BOT	YES
WORKFUSION	EXPRESS	PER PROCESS	NO

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VENDOR SELECTION MATRIX™ – ROBOTIC PROCESS AUTOMATION: EVALUATION CRITERIA

STRATEGY		
Vision & Go-To-Market	30%	Does the company have a coherent vision in line with the most probable future market scenarios? Does the go-to-market and sales strategy fit the target markets and customers?
Innovation & Partner Ecosystem	20%	How innovative is the company? How is the partner ecosystem organized and how effective is the partner management?
Viability & Execution Capabilities	15%	How likely is the long-term survival of the company in this market? Does the company have the necessary resources to execute the strategy?
Differentiation & USP	35%	Does the solution have a Unique Selling Proposition (USP) and clear differentiators?
EXECUTION		
Breadth & Depth Of Solution Offering	30%	Does the solution cover all necessary capabilities expected by the customers?
Market Share & Growth	15%	How big is the market share and is it growing above market rate?
Customer Satisfaction	25%	How satisfied are customers with the solution and the vendor?
Price Versus Value Ratio	30%	How do customers rate the relationship between the price and perceived value of the solution?

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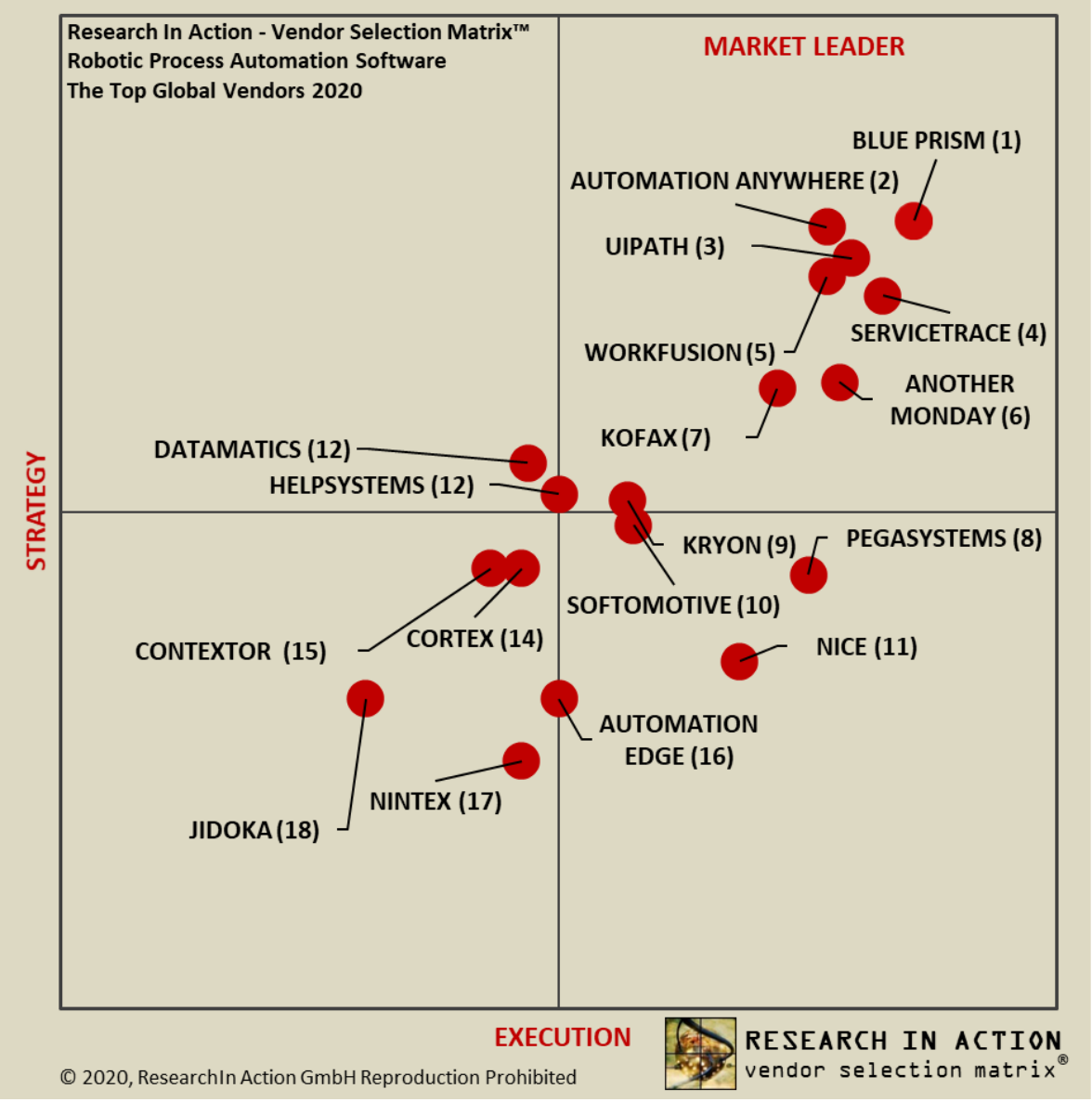
VENDOR SELECTION MATRIX™ – ROBOTIC PROCESS AUTOMATION SOFTWARE



		STRATEGY	EXECUTION	TOTAL
1.	BLUE PRISM	4.59	4.71	9.30
2.	AUTOMATION ANYWHERE	4.58	4.54	9.11
3.	UIPATH	4.51	4.59	9.10
4.	SERVICETRACE	4.44	4.65	9.09
5.	WORKFUSION	4.48	4.54	9.01
6.	ANOTHER MONDAY	4.26	4.56	8.83
7.	KOFAX	4.25	4.44	8.69
8.	PEGASYSTEMS	3.88	4.50	8.38
9.	KRYON	4.03	4.14	8.16
10.	SOFTOMOTIVE	3.98	4.15	8.13
11.	NICE	3.70	4.36	8.06
12.	DATAMATICS	4.10	3.94	8.04
	HELPSYSTEMS	4.04	4.00	8.04
14.	CORTEX	3.89	3.93	7.81
15.	CONTEXTOR	3.89	3.86	7.75
16.	AUTOMATION EDGE	3.63	4.00	7.63
17.	NINTEX	3.50	3.93	7.43
18.	JIDOKA	3.63	3.61	7.24

Note: Potential numerical deviations due to rounding.

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VENDOR SELECTION MATRIX™ – ROBOTIC PROCESS AUTOMATION

Blue Prism connected-RPA accelerates the digital workforce and provides a skill exchange

- **General:** Blue Prism was founded by automation experts in 2001 and today has a customer base of more than 2,000 enterprise customers with a renewal rate of 96%, revenue of more than $ 120 million and revenue increase in 2019 of 83%. The company is headquartered in UK with offices worldwide. Its vision of a digital workforce is to provide software which is as close to a human worker or even exceeds a human worker in certain aspects. Its June 2019 acquisition of Thoughtonomy expanded Blue Prism with a productized solution which simplifies and broadens access to its connected-RPA platform via turnkey SaaS capabilities addressing the need of mid-tier customers. Its Blue Prism Digital Exchange enables companies to access tried and tested RPA skills developed by partners and developer community. It differentiates itself from other vendors as it addresses the business and its people to leverage automation leveraging a skill exchange.
- **Strategy:** Blue Prism's vision and strategy of a digital workforce for every enterprise is enabled trough its connected RPA platform. While most customers start with less than ten digital workers, Blue Prism has achieved a successful upsell strategy in which 50% of its customers at the beginning of 2019 acquired additional digital workers. While the company has focused on enterprises across the globe, the acquisition of Thoughtonomy also has opened the mid-tier market accessing turnkey solutions via on demand and without the overhead of setting up a dedicated infrastructure wanting to adopt RPA.
- **Execution:** The company has adopted a partner sales model to address the rapidly growing demand driving up scale to deliver and serve its global customers. Blue Prism partners with global solution integrators such as EY, Deloitte, KPMG and Accenture, to bring capabilities into the market as well as providing consulting services around intelligent automation and digital transformations. Additionally, platform service providers and managed service providers are also bringing Blue Prism's RPA capabilities into large and mid-size enterprises.
- **Bottom Line:** For companies who are eager to explore RPA, Blue Prism's "digital workers environment" enterprise RPA solutions enable the creation of a centrally managed, scalable, and secure digital workforce using software robots. Its solution steps of creation of business objects and definition of process steps are separated from the actual Blue Prism robot which executes the work are unique in the market. This allows both business and IT teams working together leveraging object-based automation.

STRATEGY	RESULT
Vision & Go-To-Market	4.75
Innovation & Partner Ecosystem	4.75
Viability & Execution Capabilities	4.25
Differentiation & USP	4.50
	4.59

EXECUTION	RESULT
Breadth & Depth Of Solution Offering	5.00
Market Share & Growth	4.50
Customer Satisfaction	4.75
Price Versus Value Ratio	4.50
	4.71

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VENDOR SELECTION MATRIX™ – ROBOTIC PROCESS AUTOMATION

Automation Anywhere accelerates the digital worker strategy

- **General:** Automation Anywhere was founded in 2003. The company with headquarters in San Jose, California has more than 2,600 employees and enterprise across financial, healthcare and other verticals. Automation Anywhere has around 3,500 customers and is being sold via its 1,400 Channel Partners. Its RPA technology automates simple to complex IT task or business process. Its current revenue being around $ 240 million, and the company has received a variety of funding with its last funding round on November 2019 of $ 290 million which totals its raised funding to $ 840 million.
- **Strategy:** A key strategic focus of Automation Anywhere is to accelerate adoption of RPA from front office to back office. Its recent introduction of EnterpriseA2019 includes drag and drop artificial intelligence to automate more complex tasks creating a “digital worker”. A key part of the company's strategy is its large community and Automation Anywhere University which includes training and academic partners across 140 countries offering more than 100 e-learning courses. Recent innovations include process discovery (Discovery Bot) and mobile bot management.
- **Execution:** In August 2019, Automation Anywhere acquired Klevops, a privately held French company to expand its human-to-bot collaboration coverage. To extend its product development capabilities the company acquired Cathyos Labs in November of 2019. The creation of Automation Anywhere University in September 2017, enables the company to reskill professionals and students in conjunction with 65 training partners and more than 300 academic institutions.
- **Bottom Line:** For organizations who want a simple and easy automation of tasks and processes and have a broad ecosystem such as Salesforce, Workday, IBM, SAP Automation Anywhere is a solid partner in RPA. Its bot store enables the downloading and uploading of many bots which all had undergone strict security and testing processes.

STRATEGY	RESULT
Vision & Go-To-Market	4.50
Innovation & Partner Ecosystem	4.50
Viability & Execution Capabilities	5.00
Differentiation & USP	4.50
	4.58

EXECUTION	RESULT
Breadth & Depth Of Solution Offering	4.75
Market Share & Growth	4.75
Customer Satisfaction	4.50
Price Versus Value Ratio	4.25
	4.54

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VENDOR SELECTION MATRIX™ – ROBOTIC PROCESS AUTOMATION

UiPath tackles any kind of automation problem

- **General:** UiPath was founded in 2005 and has since grown to an enterprise software vendor with over 2,900 employees with more than 25 offices worldwide and more than 6,000 customers worldwide. In December 2019, the company closed with $ 360 million in Annual Recurring Revenue. UiPath solutions are used by organizations across all verticals in eight out of 10 Fortune 10 as well as 62% of Fortune Global 500. Its vision of "A Robot For Every Person" is resonating with business and IT departments which either start or continue expanding the number of robots across their departments and business. UiPath's end-to-end automation suite includes discovery tools, design tools (Studio) to design and test workflows, management tools which enable secure deployment and management of automations (Orchestrator) and robots which support unattended, attended and hybrid work modes with applications and humans to carry out automations.
- **Strategy:** The UiPath strategy is to enable every role within the organization with robots so that individuals can shift to more creative tasks. Its platform allows the automation work supporting the entire lifecycle of discover, build, manage, run, engage, and measure for robotic process automation. UiPath powers the complete automation cycle and can be leveraged for core RPA use cases of simple automations to complex automations. One key differentiator is their diligent focus on customer driven innovation through an insider program which shapes the future of the platform. Its strategy also includes training and upskilling of generations of workers to participate in the automation era.
- **Execution:** Recent acquisitions of ProcessGold and StepShot continue to build out the understanding and documentation of processes and tasks which are essential for an automation journey and are clear moves by the company to address the broader process automation opportunity. Partners ranging from business process outsourcing firms, system integrators and managed service providers are supporting UiPath growth and global reach with a goal to attain 70% of their software revenue through successful partnerships. Key integrations with Microsoft Office 365, Microsoft Dynamic 365 and Microsoft Azure attract business and developers alike. Its new additions in 2019 ranged from a process-discovery tool, AI fabric integration, a new cloud community of robot users and embedded text analytics tools for better automation.
- **Bottom Line:** For organizations in their digital transformation journey, the UiPath Automation Platform enables you to accelerate the time to deliver automations to the business while at the same time equips business team's tech savvy business users who want their own tools to build and run automations. Its continuing innovations and partnerships such as Microsoft Azure makes this RPA vendor a solid partner for robotics automation.

STRATEGY	RESULT
Vision & Go-To-Market	4.50
Innovation & Partner Ecosystem	4.75
Viability & Execution Capabilities	4.25
Differentiation & USP	4.50
	4.51

EXECUTION	RESULT
Breadth & Depth Of Solution Offering	4.75
Market Share & Growth	5.00
Customer Satisfaction	4.25
Price Versus Value Ratio	4.50
	4.59

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VENDOR SELECTION MATRIX™ – ROBOTIC PROCESS AUTOMATION

ServiceTrace enables to complete RPA projects with one tool offering great scalability and security

- **General:** ServiceTrace is a German vendor with 16 years plus experience in process automation. With its more than 75 employees, it provides process automation for than 120 customers across all industry verticals including many of the 2,000 largest companies in Europe such as Daimler and Vodafone. Its XceleratorOne Enterprise Process Automation (EPA) enables the management of the entire automation lifecycle. Key differentiators are that the solution is simple to use with an intuitive user interface and wizard-based drag and drop capabilities. A central web-based server allows for the management of processes and robots with details on status information on ongoing automation projects.
- **Strategy:** XceleratorOne combines all required resources (people, bots, apps, automations) under a single platform providing a complete project management and guidance for all parties (CoE) through the RPA lifecycle (evaluation, design, build, test, operate, financial and business control). The combination with a full BPM engine and bots allows the operation of extreme large automation processes. ServiceTrace strategy is to accelerate automation with its platform but most important, and therefore a great differentiator, is its capability to ensure visibility to all participants of the automation project and sharing status details to accelerate collaboration and support throughout the project. While Secure Session runs as a hidden, invisible and thus protected Windows session it prevents access and spying. Secure session also allows for vertical scaling which means multiple robots can automatically be started on the same machine which eliminates additional hardware and because of that additional costs.
- **Execution:** ServiceTrace was one of the first companies to develop software robots and automation solutions pioneering the RPA market. Its close collaboration with universities and its work on projects on the development of virtual employee pools are just two examples of the company's vision and capabilities. In 2019, the company has added new partners in North America, UK and the Asia-Pacific region. The company covers a wide spectrum of automation needs and offers customers integration support.
- **Bottom Line:** For organizations who want to leverage an RPA tool which covers the entire lifecycle with maximum security at a low cost, ServiceTrace XceleratorOne is an excellent choice. The company has achieved the best price/value ratings across all vendors. Customers who want to solve large and complex process problems will benefit from ServiceTrace lifecycle approach.

STRATEGY	RESULT
Vision & Go-To-Market	4.75
Innovation & Partner Ecosystem	4.75
Viability & Execution Capabilities	3.25
Differentiation & USP	4.50
	4.44

EXECUTION	RESULT
Breadth & Depth Of Solution Offering	5.00
Market Share & Growth	4.00
Customer Satisfaction	4.50
Price Versus Value Ratio	4.75
	4.65

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VENDOR SELECTION MATRIX™ – ROBOTIC PROCESS AUTOMATION

WorkFusion leverages its Artificial Intelligence DNA for intelligent automation

- **General:** WorkFusion has more than 150 customers which have adopted WorkFusion core platform or RPA Express solutions. The companies Intelligent Automation solutions are powered by pre-trained ExpertBots, proprietary artificial intelligence technology and advanced analytics which all work in conjunction to automate a wide range of processes and tasks. Its solutions leverages pretrained models for documents and specific use case data and pretrained robots. The bots can detect, learn and adapt their function and performance using real-time, variable data.
- **Strategy:** WorkFusion DNA is in Artificial Intelligence (AI) and Machine Learning (ML) which are key parts of its strategy. Its native AI engine automates unstructured data in a simple way. Pretrained use case are assisted with expert bots to automate input into a fast set of enterprise applications such as for example SAP. The combination presents an Intelligent Automation which is used by companies with document-heavy processes for example in the consumer or retail verticals. Free downloads of the Intelligent Automation Cloud Express has one bot including a code and object recorder. The Enterprise version provides an unlimited amount of bots.
- **Execution:** The company has grown its installed base as many organizations are able to reuse the existing prebuild Intelligent Automation capabilities. The WorkFusion cloud allows partners, customers and the WorkFusion team to roll out use cases on their own. Key partnerships, for example with NEC, extend the usage of its Intelligent Automation Cloud. WorkFusion has invested in a partner program which is comprised of Technology Partners like SAP, Strategic Partners like NEC and System Integrators which scale the use cases and assist in go-to-market work. Excellent customer service teams are valued by its customers and has given this vendor a solid score in customer satisfaction.
- **Bottom Line:** WorkFusion single platform, support and education offering coupled with the fast implementation capability attracts customers and partners in heavy regulated industries. Its RPA platform is geared towards an analytics-based approach and companies who are looking for unattended automation and unstructured use cases, WorkFusion is an excellent choice. Its simple pricing model has been rewarded with solid scores on price/value from our survey participants.

STRATEGY	RESULT
Vision & Go-To-Market	4.50
Innovation & Partner Ecosystem	4.75
Viability & Execution Capabilities	4.00
Differentiation & USP	4.50
	4.48

EXECUTION	RESULT
Breadth & Depth Of Solution Offering	4.50
Market Share & Growth	4.75
Customer Satisfaction	4.50
Price Versus Value Ratio	4.50
	4.54

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VENDOR SELECTION MATRIX™ – ROBOTIC PROCESS AUTOMATION

Kryon automates the automation with process discovery

- **General:** Kryon which was founded in 2008 offers an end-to-end automation platform including the discovery and automation of processes. The company, headquartered in Tel Aviv, has global presence with 10 offices in 7 countries and serves enterprises in all industries. In October 2019, the company raised $ 40 million in a Series C financing round to further accelerate its robotic process automation solutions. Year-over-year sales and its global footprint expanded to more than 200 customers including companies like AIG, Allianz, Deutsche Telekom, Ernst & Young, Ferring Pharmaceuticals, HP, Microsoft, Santander Bank, Sberbank, Verizon and Wyndham Hotel Group.
- **Strategy:** With a full-cycle automation platform the company's strategy is to enable individuals and groups through the discovery of comprehensive business processes which upon evaluation recommend the top candidates for automation. Its strategy is to start with this process discovery to get a complete picture or full visibility into all processes and their variant ways of doing them in the organization. The solution leverages computer vision and deep-learning technology to identify which processes can be automated, where time can be saved or where a change in process might be appropriate. With its built-in visual recognition algorithms the robot can recognize any object and the solution works with any application spanning desktop to legacy programs and emulators.
- **Execution:** In October 2019, Kryon has launched a global partner program to extend its ability to deliver its innovations to customers worldwide. A variety of partner levels such as Gold, Silver, Bronze and Referral offers several capabilities for partners to achieve competency with Kryon Systems automation platform. Kryon has strategic partnerships with companies like Software AG, Verint, Amdocs, Microsoft, Wipro, Capgemini, Genpact, IBM, and EY.
- **Bottom Line:** For organizations which want to improve or reduce process discovery time, eliminate unnecessary processes and tasks and automate them, Kryon is solid partner for full-cycle/end-to-end automation. Its roadmap details additional innovations which will help in the optimization of processes not just automation.

STRATEGY	RESULT
Vision & Go-To-Market	4.25
Innovation & Partner Ecosystem	4.50
Viability & Execution Capabilities	3.00
Differentiation & USP	4.00
	4.03

EXECUTION	RESULT
Breadth & Depth Of Solution Offering	4.25
Market Share & Growth	4.00
Customer Satisfaction	4.25
Price Versus Value Ratio	4.00
	4.14

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VENDOR SELECTION MATRIX™ – ROBOTIC PROCESS AUTOMATION

Softomotive empowers people and enterprises with a simplified automation journey

- **General:** Softomotive was founded in 2005 with headquarters in London with additional offices in New York, Austin, Athens, Seoul and Bengaluru, India. The company received $ 25 million in Series A funding in September 2018 to expand sales, product development and professional services. In 2019 the company doubled its headcount to more than 170 worldwide employees and currently has over 8,000 customers across the globe. Its automation offerings include desktop automation WinAutomation (standalone) which is a Windows-based software that allows for automation of routine and repetitive tasks on any desktop or any web-based application. Its RPA platform, ProcessRobot (server based) provides a scalable and secure way to automate processes in attended and unattended mode, distribute and manage workloads to robots, resolve exceptions, and tracks and assess their performance. WinAutomation and ProcessRobot share the same underlying engine for seamless transition, and support concurrency which enables multiple processes to run using a single license.
- **Strategy:** Softomotive strategy is to provide low/no-code easy-to-use software solutions that scale from individuals, small teams, growth companies to enterprise wide deployments. Its strategy is focused on enabling the people who do the work to automate tasks and processes and become critical collaborators in a company's automation journey. Its vision to democratize RDA/RPA is supported by the Softomotive Academy which enables professionals and developers with the necessary know-how, training and certifies the learning and upskilling in RPA across multiple languages. A recent introduction of an RPA language called "Robin" can be used as a standard language in describing any process. The company plans to open-source Robin soon.
- **Execution:** In 2019, the company hired a variety of executives to support its global expansion, opened several offices, introduced its Atlas program to accelerate customer RoI and released new versions of its products with enhanced actions, integrations and security. The partner network consists of 180 partners in all key geographies. Its professional services and support team offers training and onboarding, development services and customer support with a community board and forum to reach and connect with end-users.
- **Bottom Line:** Softomotive's easy to use WinAutomation and the possibility to seamlessly upgrade to ProcessRobot enables organizations who want to scale their automation journey and achieve good RoI with good product features. WinAutomation licensing model of per-machine, per-user via an annual subscription is attractive for a low up-front cost, helping to reduce overall project risk, and enabling a predictable automation budget.

STRATEGY	RESULT
Vision & Go-To-Market	4.00
Innovation & Partner Ecosystem	4.25
Viability & Execution Capabilities	3.50
Differentiation & USP	4.00
	3.98

EXECUTION	RESULT
Breadth & Depth Of Solution Offering	4.25
Market Share & Growth	4.00
Customer Satisfaction	4.00
Price Versus Value Ratio	4.25
	4.15

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VENDOR SELECTION MATRIX™ – ROBOTIC PROCESS AUTOMATION

Datamatics drives intelligent automation by leveraging its IPs

- **General:** Datamatics is a global IT & BPM company whose RPA product has evolved over a while from its BPM operations. Datamatics TruBot is an enterprise-grade RPA product that is commercially licensed to enterprises around the globe. The RPA platform has 2 major modules TruBot Designer and TruBot Cockpit. With TruBot Designer, a business user can create bots using a process recorder/visual workflow and with the help of TruBot Cockpit, the bots can be managed and monitored. The functionalities of TruBot are extended by its products TruCap+ (Intelligent Data Capture solution), TruBot Neuro (AI powered bot), and TruBot Analytics (Advanced Analytics solution) to deliver intelligent automation.
- **Strategy:** To continue to expand its RPA technology business, Datamatics intends to strengthen its Intelligent Automation suite by enhancing the user experience and product features with the use of AI and ML. Datamatics further plans to expand and leverage its partnership for Business, Training, and implementation. BFSI, Healthcare, Travel & Logistics, and Manufacturing continue to be the target industries with a focus on North America, Europe, and APAC.
- **Execution:** Datamatics leverages its domain expertise to help clients be successful in their RPA journey. The company has more than 100 partners and resellers who are part of its Marquee Partner program. Its recent launch of TruBot 4.0 added new features like visual workflow, universal recorder, RoI calculator bot health checkup and additions to its low-code component library.
- **Bottom Line:** Datamatics TruBot can be deployed in the cloud, on-premise, and physical as well as on virtual machines. Companies who need a flexible deployment model plus consulting & implementation services including support on setting-up their RPA Center of Excellence (CoE), or guidance on change management, Datamatics can be the right partner.

STRATEGY	RESULT
Vision & Go-To-Market	4.00
Innovation & Partner Ecosystem	3.75
Viability & Execution Capabilities	5.00
Differentiation & USP	4.00
	4.10

EXECUTION	RESULT
Breadth & Depth Of Solution Offering	4.00
Market Share & Growth	4.00
Customer Satisfaction	3.75
Price Versus Value Ratio	4.00
	3.94

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VENDOR SELECTION MATRIX™ – ROBOTIC PROCESS AUTOMATION

HelpSystems targeting the mid-market with additional focus towards security automation

- **General:** HelpSystems is a software company which was founded in 1982 as infrastructure software company and is headquartered in Minneapolis, Minnesota, USA. Its solution portfolio focuses on two key topics: security and automation. The automation portfolio includes Robotic Process Automation, Robotic Desktop Automation as well as Business Process Automation. In November 2018, the company acquired JAMS to add workload automation to expand its offering in the automation space. Additional acquisitions in the security space with Core Security and Clearswift opens opportunities in the security automation space. The company has received investment injections from private equity companies such as TA Associates and Charlesbank. Over 50% of Fortune 500 companies use Automate with over 2600 systems installed globally.
- **Strategy:** The company focuses on making automation easier to acquire, license and implement. Its simple licensing model spans across its automation solutions. The solutions of Automate Desktop, Automate Plus and Automate Ultimate are available via subscription or perpetual licenses. While Automate Plus is licensed for the mid-size enterprise which includes five bots, one production instance and two developer studios, Automate Ultimate includes an unlimited number of bots and studies and is designed for both mid-size and larger enterprises.
- **Execution:** Its broad product portfolio addresses other management needs such as monitoring, compliance, business intelligence, cloud management, document automation and cyber security allows the company to upsell or cross-sell its RPA capabilities into its installed base customers as well as organizations seeking complete solutions. A variety of customers in Financial Services, Clinical Healthcare and Mobile Infrastructure have accelerated HelpSystems expansion of its customer base.
- **Bottom Line:** Its ease-of-use for IT and business users has given HelpSystems a great reputation with both mid-market and large enterprise customers. Customers of any size demanding robust functionality and stable solutions should take a close look at HelpSystems. The majority of customers are located in North and South America.

STRATEGY	RESULT
Vision & Go-To-Market	4.00
Innovation & Partner Ecosystem	4.00
Viability & Execution Capabilities	4.25
Differentiation & USP	4.00
	4.04

EXECUTION	RESULT
Breadth & Depth Of Solution Offering	4.00
Market Share & Growth	4.00
Customer Satisfaction	4.00
Price Versus Value Ratio	4.00
	4.00

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VENDOR SELECTION MATRIX™ – ROBOTIC PROCESS AUTOMATION

Cortex intelligently automates for outcomes

- **General:** Cortex was founded in 1992 in the UK and is headquartered in Southampton. The company has more than 50 employees and serves 26 customers across a variety of enterprises. Current customers include British Telecom, Thomas Reuters and Vodafone to name a few. The company offers intelligent automation across all segments of their SADA model (sense, analyze, decide, act) which are essential areas for intelligent automation.
- **Strategy:** Cortex strategy is to ensure that its customers have a high success rate when adopting its Unified Intelligent Automation Platform. Cortex believes it is important to first understand automation, and the challenges and opportunities it brings, and then to define and communicate a strategic vision for automation throughout the organization. Its vision is not just "to automate some process" but define it in business terms such as improve process quality, or to increase process capacity, or to reduce process costs. A key differentiator is that the company works closely with its customers to ensure that the automation initiated achieves these business desired outcomes. The company claims to have achieved a 97% success rate with its customers.
- **Execution:** The Unified Intelligent Automation Platform automation platform can integrate with other systems and RPA solutions to enable transformation of operations enabling man machine collaborations. To design a process with Cortex Intelligent Automation platform no programming experience is needed. The company works with partners including Capgemini, TCS, and Tech Mahindra to achieve successful projects. Kickstarter and launch programs are available for customers to accelerate their automation journey.
- **Bottom Line:** For organizations who want to put its business process owners and subject matter experts at the core of automation projects, Cortex Unified Intelligent Automation Platform is a good partner. Once a process is designed, leveraging its web-based solution, it can be migrated through development into test and then into production very easily.

STRATEGY	RESULT
Vision & Go-To-Market	4.00
Innovation & Partner Ecosystem	4.00
Viability & Execution Capabilities	3.75
Differentiation & USP	4.00
	3.89

EXECUTION	RESULT
Breadth & Depth Of Solution Offering	4.00
Market Share & Growth	3.50
Customer Satisfaction	4.00
Price Versus Value Ratio	4.00
	3.93

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THE RESEARCH IN ACTION GMBH VENDOR SELECTION MATRIX™ METHODOLOGY

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APPENDIX: IT AUTOMATION MARKETEXTURE DEFINITIONS

- AI Powered Chatbot Platforms which are used to build applications that answer questions, provide advice and/or recommendations using natural language processing and other dialog related technologies.
- Artificial Intelligence and Machine Learning (AI/ML) are both technologies and are leveraged in automation solutions. Artificial intelligence (AI) is the ability of a computer program or machine to think and learn (AI can mimic human cognition). Within IT Automation AI is used to correctly interpret a variety of data, to learn from such data, and to use those learnings to achieve specific goals and tasks through flexible adaptation. Machine learning enables computers with the ability to learn without being programmed (explicit algorithms). It explores the study and construction of algorithms which can learn and make predictions on data. The algorithms follow programmed instructions or can make predictions or decisions based on the data. Machine learning is used when explicit algorithms cannot be done (e.g. computer vision, search engines, optical character recognition).
- Artificial Intelligence for Operations (AIOps) solutions equip IT enterprise teams with analysis of volumes and categories of data to improve key processes, tasks and decision making. The adoption of these tools automates the ingestion of fast volumes of data; leverage machine learning to analyze the data, present findings to either predict or alert on issues, and leverage the knowledge for automation or decision making.
- Application Release Orchestration (ARO) solutions equip IT enterprise organizations and their teams with the automation of the software deployment cycle across hybrid technology environments.
- Continuous Application Performance Management (CAPM) software solutions continuously identify issues around performance and availability of software applications, IT and enterprise services. The solutions strive to proactively detect and diagnose application performance problems and health and enable a situational awareness of application related issues.
- Enterprise Service Management (ESM) is a category of business management software - typically a suite of integrated applications that a service organization uses to capture, manage, save and analyze data critical to their service business performance. It automates service offerings across functional areas such as (1) Human resources, (2) Vendor management, (3) Technical services, (4) Field services, (5) Financial management and (6) Shared services organizations.
- IT Asset Management (ITAM) software manages the full lifecycle of IT assets which typically includes all software, hardware, networking, cloud services, and client devices. In some cases, it may also include non-IT assets such as buildings or information where these have a financial value and are required to deliver an IT service. IT asset management can include operational technology (OT), including devices that are part of the Internet of Things. These are typically devices that were not traditionally thought of as IT assets, but that now include embedded computing capability and network connectivity.
- IT Financial Management (ITFM) software enables the accurate and cost-effective management of IT assets and resources with the aim to plan, control, recover (or overall manage) costs which are occurring while providing IT and Enterprise Services to the organization.
- IT Service Management (ITSM) refers to the entirety of activities – directed by policies, organized and structured in processes and supporting procedures – that are performed by an organization to plan, design, deliver, operate and control Information Technology (IT) services offered to customers. It is thus concerned with the implementation of IT services that meet customers' needs, and it is performed by the IT service provider through an appropriate mix of people, process and information technology.
- Robotic Process Automation (RPA) solutions enable the automation of tasks, processes and procedures which are normally conducted by a human. RPA solutions create software robots that mimic human actions. Typically, these are tasks that a human would do. (Ro)Bots and Virtual Agents are part of RPA solutions.
- Secure Unified Endpoint Management (SUEM) software enables the management and securing of mobile applications, content, collaboration and provides for the management of all endpoints like smartphones, tablets, laptops, printers, ruggedized devices, Internet of Things (IoT) and wearables.
- Technology Cost and Resource Optimization (TCRO) software enables the planning, management and visibility of the supporting and required business and IT technology resources from a cost and capacity perspective by visualizing, planning, prioritizing and optimizing the usage and demands of technology resources (people, processes and technologies) for the enterprise.
- Value Stream Management (VSM) software solutions capture, visualize, and analyze the flow of work across the entire agile software delivery project. The capabilities include end-to-end visibility, traceability and governance over the entire process and help to plan, track, and steer work at the team, program, portfolio, and enterprise levels. It includes the people working on a project, the systems which are operated and leveraged, and the flow of information and materials between teams. It enables the measurement of speed and quality for digital transformations.

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