Magic Quadrant pour les plateformes de Process Mining

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Les plateformes de Process Mining offrent aux leaders de l'innovation technologique une visibilité et des informations qui leur permettent de prendre des décisions intelligentes et de répondre aux priorités critiques de leur organisation. Nous examinons les forces du marché et les principaux fournisseurs de plateformes qui ont évolué à partir du Process Mining.

Hypothèses de planification stratégique

D'ici 2026, 25 % des entreprises mondiales auront adopté les plateformes de Process Mining comme première étape pour créer un jumeau numérique pour les opérations commerciales, ouvrant la voie à des opérations commerciales autonomes.

D'ici 2026, une maturité insuffisante en matière de gestion des processus métier empêchera 90 % des organisations d'atteindre les résultats commerciaux souhaités grâce à leurs initiatives d'exploration des processus de bout en bout.

Définition/description du marché

Gartner définit les plateformes de Process Mining comme des plateformes conçues pour découvrir, surveiller et améliorer les processus en extrayant des connaissances à partir d'événements capturés dans les systèmes d'information afin de fournir en permanence une visibilité et des informations. L'exploration des processus comprend la découverte automatisée des processus (extraction de modèles de processus à partir d'un journal des événements), la vérification de la conformité (surveillance des écarts en comparant le modèle et le journal), l'exploration des réseaux sociaux/organisationnels, la construction automatisée de modèles de simulation, l'extension du modèle, la réparation du modèle, la prédiction de cas et les recommandations basées sur l'historique. Les plateformes de Process Mining étendent les capacités de Process Mining grâce à des analyses de processus avancées, à la détection de l'amélioration des processus et à des recommandations d'amélioration des processus, en partie pilotées par l'IA et l'IA générative (GenAI).

- **Découverte et analyse des processus** : le Process Mining offre une visibilité et une compréhension des opérations et des processus métier réels en appliquant un ensemble d'algorithmes aux événements, ce qui permet d'obtenir des modèles de processus adaptables,

maintenables et validés. Cela s'étend également à la fourniture d'informations ciblées sur l'amélioration des opérations et des résultats commerciaux. Le Process Mining permet aux analystes de processus métier de documenter, d'analyser, de rationaliser et de reconcevoir des processus complexes à un niveau conceptuel et logique, indépendamment de toute automatisation prévue.

- **Comparaison, analyse et validation des processus** : l'exploration des processus permet de valider ou d'auditer si les opérations réelles sont conformes aux procédures opérationnelles standard, aux politiques, aux instructions de travail et aux meilleures pratiques définies en interne, intégrées dans les applications d'entreprise, telles que l'ERP et le CRM. Il garantit également la fiabilité des rapports financiers externes et le respect des lois et réglementations externes. Une autre variante de ce cas d'utilisation est la comparaison et l'analyse des mêmes processus entre différentes unités commerciales, filiales ou même pays (exploration comparative des processus).

- **Découvrir et valider les opportunités d'automatisation** : le Process Mining aidera les analystes métier à découvrir et à évaluer les opportunités d'automatisation des processus. Il crée efficacement l'analyse de rentabilisation de l'automatisation, ce qui peut souvent être difficile sans une connaissance réelle des processus. Lesmodèles P rocess sont souvent utilisés pour configurer les applications d'entreprise et leurs processus intégrés, tels que l'ERP et le CRM.

- **Transformation numérique** : après avoir déplacé la portée de l'exploration des processus au niveau opérationnel et organisationnel, il n'y a qu'un pas à franchir pour relier ces informations opérationnelles à de grandes initiatives stratégiques telles que la transformation numérique ou l'entreprise numérique. Ce cas d'utilisation croissant attire de plus en plus l'attention en raison du thème de l'entreprise numérique et, plus récemment, de la transformation numérique.

- **Découvrir et valider les opportunités GenAI** : le Process Mining aidera les chefs d'entreprise et les analystes à découvrir et à évaluer les opportunités d'application GenAI. Il crée efficacement l'analyse de rentabilisation de GenAI, ce qui peut souvent être difficile sans une connaissance réelle des processus et sans savoir comment les organisations créent de la valeur grâce à leurs opérations courantes.

Fonctionnalités obligatoires

Les fonctionnalités obligatoires pour ce marché sont les suivantes :

- **Modèles de processus et analyse** : découverte automatisée des modèles de processus, des exceptions et des instances de processus (principalement appelées « cas »), des interactions avec les clients (parcours) et des interactions avec les employés, ainsi que des fréquences et des statistiques de base.

- **Exploration comparative des processus** : permet de vérifier la conformité et la conformité, non seulement graphiquement par le biais de superpositions, mais aussi par l'analyse des données et l'analyse des écarts.

- **Amélioration du modèle de processus** : implique une prise en charge intelligente de l'amélioration ou de l'extension des modèles de processus existants ou a priori en utilisant des données supplémentaires provenant de journaux et d'événements enregistrés.

Caractéristiques communes

Les caractéristiques communes àce marché sont les suivantes :

- **Orchestration des processus** : une plateforme qui étend les capacités d'exploration des processus à différents processus avec des capacités d'analyse avancées et des capacités de gestion des décisions. La plateforme propose également des API pour créer des applications de process mining. Cela permet aux organisations et aux partenaires des fournisseurs de Process Mining de créer des applications telles que des outils d'audit financier.

- **GenAI capabilities** — Involves using GenAI-powered capabilities to improve data preprocessing and discovery; supporting adaptive process modifications through real-time monitoring and refined recommendations; and enhancing explainability and understandability, thus broadening process mining accessibility to a wider audience.

- **Execution support** — Involves execution capabilities that turn insights into action. These capabilities could range from simply updating source applications (applications that deliver the events for process mining) to preparing or creating scripts that support the execution of tasks, or processes.

- **Data access and preparation** — Includes data preparation, data quality, data integration, supporting big data as well as different ways to handle data.

- **Business activity monitoring and management** — Real-time dashboards with support for KPIs that are continuously monitored and enable decision support.

- **Advanced process analysis** — Involves predictive analysis, prescriptive analysis, scenario testing, simulation and advanced process analytics capabilities that use contextual data.

- **Task mining** — Involves inferring useful information from low-level event data available in UI logs. The UI logs describe the single steps within a task done by a user, such as using a workstation based on keystrokes, mouse clicks and data entries.

Magic Quadrant

Figure 1: Magic Quadrant for Process Mining

CHALLENGERS · LEADERS · NICHE PLAYERS · VISIONARIES

Celonis

Software AG

SAP Signavio

UiPath

Microsoft

Apromore

IBM

Appian

ABBYY

MEHRWERK

QPR Software

Pegasystems

Skan

StereoLOGIC

UpFlux

Cyclone Robotics

mindzie

Proxverse

ABILITY TO EXECUTE

COMPLETENESS OF VISION →

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Vendor Strengths and Cautions

ABBYY

ABBYY is a Leader in this Magic Quadrant. The process mining offering we assessed is ABBYY Timeline, version 6.04. Timeline has prebuilt integration with SS&C Blue Prism via Blue Prism Process Intelligence. Timeline exploits ABBYY's extensive optical character recognition (OCR) and intelligent document processing (IDP) capabilities to extend its process and task mining with unstructured data gleaned from documents and related sources. Timeline is delivered via ABBYY's multitenant-hosted SaaS environment on Amazon Web Services (AWS), but is also available for private installation on AWS or Microsoft Azure, as well as on-premises. ABBYY's operations are geographically spread, but most resources are in the U.S., U.K. and Europe. ABBYY serves verticals including financial services and banking, pharmaceuticals, accounting, insurance and manufacturing. ABBYY plans deeper integration of generative AI (GenAI) across its platform to enable a natural conversational interface for process analysis, as well as deeper integration with ABBYY Vantage. This will enable customers to turn their process insights into process automations for document-centric processes.

Strengths

- **Document and text data:** ABBYY was the first vendor to realize the potential value of extending process mining with unstructured or semistructured information captured in documents. ABBYY's IDP capabilities reveal additional information that increases insights into how processes are behaving.

- **Execution:** ABBYY promotes the synergies of process mining and task mining with IDP and the value this creates for the customer, who can use them to make decisions that are actionable in real time. It promotes these through OEM partnerships with SS&C and Blue Prism to support automation initiatives.

- **Offering (product/services):** ABBYY provides a comprehensive suite of services, including process experts, technical account managers and Timeline trainers to help customers where appropriate. ABBYY also has a strong partner ecosystem with representation in Europe, the Middle East and Africa (EMEA), Asia/Pacific and North America to support buyers during implementations, providing help tailored to verticals or automation initiatives.

Cautions

- **Generative AI:** ABBYY currently provides a no-code hypothesis builder through its Query and Protocol modules, allowing users to diagrammatically create their prompts and retrieve the associated data and insight. ABBYY's focus for 2024 is to integrate GenAI more deeply into Timeline to enhance user interaction by enabling natural language queries and suggesting process elements that should be promoted for automation.

- **Customer experience:** Gartner Peer Insights revealed cautionary remarks about Timeline's ability to intuitively gather insights, as well as the number of steps required to do so. Although ABBYY will explore the ease of insights through GenAI, customers should assess user experience and ease of use when assessing the product.

- **Verticals/industry strategy:** ABBYY mainly serves banking, financial services, and insurance, as well as healthcare and pharmaceuticals. Although ABBYY plans to expand into more verticals, potential clients should verify the applicability of the offering, as well as the partner support available.

Appian

Appian is a Leader in this Magic Quadrant. The process mining offering we assessed is Appian Process Mining, version 5.9. This is also a component of Appian Platform. Appian Process Mining integrates its process mining toolset into the Appian process automation platform. This enables the use of discovered processes for jump-starting automation projects in Appian. It also enables Appian process analytics data to be fed into Appian Process Mining. Appian's operations are worldwide; they support clients in all industries, but focus on financial services, public sector, insurance, manufacturing and healthcare/life sciences. Appian's plans include recommendations guided by a chat-based AI assistant, making process mining analysis understandable and accessible to everybody by guiding the user through an analysis and improvement of the process. Appian also plans advanced simulation and to embed process insights into Appian applications, so applications can dynamically react to changing conditions without developer intervention.

Strengths

- **Market positioning**: Appian aims to build a new category of holistic process management platform that integrates process mining into the Appian platform. The platform converts any discovered process model automatically into an Appian workflow (model to workflow), mines Appian's data fabric to obtain end-to-end process insights, and measures the cost savings delivered by an Appian app.

- **Innovation:** The smart knowledge model and data graphs in Appian's data fabric simplify data availability and usability, and provide its process mining with continuous monitoring and adaptation of data in real time or near real time. Appian's self-service analytics with AI Copilot enables business users to explore their data fabric in real time, quickly design reports and access powerful AI insights.

- **Process execution and orchestration:** The Appian platform is well-constructed for the "support for process execution" use case of process mining, whether acting on triggered thresholds during runtime or by exporting process models during design time. The Appian platform enables secure execution and monitoring of robotic process automation (RPA) capabilities for task-level automation, enterprise-grade workflow for applications, and process orchestration across bots, humans and scripts for business process management.

Cautions

- **Automation use case**: Appian focuses on end-to-end process automation — RPA, business process automation (BPA) and low-code application platforms (LCAPs) — but still supports process mining as a stand-alone offering. Automation is the biggest driver of the adoption of process mining and accounts for approximately 55% of all use cases. Clients considering nonautomation use cases should verify the experience and support that Appian and its implementation partners deliver.

- **Business activity monitoring:** Appian received only a medium evaluation for business activity monitoring, despite the excellent capabilities provided by its data fabric. Objectives for KPIs can be captured as thresholds in the dashboard, which are used for alerting. However, the connection to underlying assumptions or a metric hierarchy is not provided and is currently delegated to developer teams for added flexibility.

- **Customer experience:** Based on a limited number of references within Gartner Peer Insights, Appian was positioned lower for client experience than the other vendors assessed for this report. Major contributing factors mentioned were product support for process mining, pricing and contracting. Clients considering Appian Process Mining should select a higher-than-basic level of support contract.

Apromore

Apromore is a Leader in this Magic Quadrant. The process mining offering we assessed is Apromore Enterprise Edition 9.3. Australia-based Apromore has expanded to cover the U.S. and parts of Europe, including the U.K., Italy, Estonia and Spain. Apromore's clients are mainly in the

banking, financial services, insurance, logistics and public sectors. Apromore provides a single, integrated, no-code environment for process mining, modeling, simulation and monitoring. It supports object-centric process mining (OCPM) at the data modeling and discovery analysis levels. In 2024, Apromore plans an AI assistant for conversational as-is process analysis, what-if process analysis by triggering simulations on autodiscovered models, and process optimization that recommends process redesigns. Furthermore, it plans a new centralized solution for risk officers to track compliance with regulations and a completely redesigned user interface.

Strengths

- **Ease of use**: Apromore's no-code environment enables process mining practitioners to accelerate time to insights, simulate proposed changes and implement continuous monitoring, alerts and dashboards without reliance on IT and data scientists. Apromore seeks user feedback frequently to enhance customer experience.

- **Innovation**: Apromore provides AI-driven root cause explanations using the FIGS algorithm for KPI violations. The platform also features predictive dashboards for configuring charts with anticipated metrics and start time estimation for logs lacking start times. It also includes an Automation Assessment Report summarizing automation benefits in terms of time and cost metrics after simulating as-is and to-be-automated processes.

- **Task mining**: Being one of the first process mining companies to add task mining to its offering, Apromore is task-mining-agnostic. This means it can collect data from any task mining tool and integrate it into its logs via its extraction, transformation and loading (ETL) functionality. Users can discover process models from event logs or individual tasks from task logs, and both levels are combined into a single activity-step log, enabling users to explore, zoom in and visualize task mining steps for selected activities.

Cautions

- **Deployment**: Apromore is exclusively cloud-native, provided through a SaaS model, and no longer supports on-premises deployment. As an alternative, Apromore offers installation on its AWS cloud tenancy or the customer's own cloud tenancy, as well as a hybrid deployment option where the data volume is hosted on the customer's cloud tenancy. Those seeking on-premises environments should communicate their requirements.

- **Geographic strategy**: Although Apromore has increased its geographical presence, notably in North America, it is still limited to certain markets and relies on partners to help with deployment. The restricted markets served are evident in the limited language support offered. Potential clients, specifically in Latin America, should verify availability as well as access to support, if required.

- **Verticals**: Apromore mainly serves service-intensive sectors — primarily banking, financial services and insurance, as well as the public sector, energy and utilities, and telco. Although Apromore plans to expand into more verticals, potential clients should verify the applicability of the offering, as well as the partner support available.

Celonis

Celonis is a Leader in this Magic Quadrant. The process mining offering assessed is the Celonis Process Intelligence Platform. This is a containerized, microservices-based cloud platform. Beyond process intelligence capabilities, the platform also provides process intelligence solutions. The platform core is the Process Intelligence Graph, which captures process data and process knowledge (industry benchmarks, metrics, filters, anomalies). Process analysis capabilities then enable users to consume the platform (Studio to build custom analyses, Business Miner, Process Copilot). Celonis has 22 offices worldwide, with its core markets being Western Europe, the U.S. and Japan. Its clients span all industries. Celonis plans to shorten time to value with a unified object-centric process data model, enriched with AI. It also plans to integrate its acquired Symbio capabilities (process modeling) into the Celonis user experience and customer journey. It aims to pursue GenAI capabilities, including process explainability and synthesis, data integration generation, and enhancement of low-code process intelligence app building with user experience prompt generation.

Strengths

- **Execution:** Celonis has helped draw attention to the process mining market, which it has dominated since its commercialization. Celonis has the largest customer base in this market, and we estimate its market share to be around 50%. In 2023, Celonis acquired Symbio, a process repository tool that will enable Celonis clients to design, model, and govern processes, supported by Symbio's AI capabilities.

- **Innovation:** Process Intelligence Graph is the core of the Celonis Platform. Process data is modeled in a standardized, object-centric process data model that acts as an extensible digital twin of the business. The platform's Knowledge Hub enables users to create and manage metrics, strategic objectives, improvement opportunities, filters and other objects supported by the object-centric process data model.

- **Marketing strategy:** Celonis has a unique brand design and style with an "anticorporate" approach. It strives to evoke the spirit of a grassroots movement, with Celonis users as changemakers, driven to change the status quo. Celonis' marketing language and tone have evolved to match this approach, becoming more straightforward, immediate, and less technical.

Cautions

- **Pricing:** Larger clients have told us the new pricing model can be complex when starting out or moving to the new object-centric process data model. In particular, they brought up how an organization's revenue is taken into account for the final pricing and the process-by-process approach.

- **Customer experience:** Observations made in the previous Magic Quadrant are still to be implemented. In Gartner Peer Insights, clients refer to pricing and the steep learning curve required to make the most of the platform's extensive functionality and flexibility. Customers

would like more accurate support from the service desk, and support when scaling to other parts of the organization.

- **Task mining**: Celonis has considerably improved its capabilities and delivery for the workforce productivity use case of task mining. However, Celonis could add more capabilities to address use cases other than workforce productivity, such as low-volume, high-variety interaction processes (for example, call centers).

Cyclone Robotics

Cyclone Robotics is a Niche Player in this Magic Quadrant. The process mining offering we assessed is Process Intelligence, version 2.2. Cyclone Robotics is predominantly an RPA vendor that has added process mining capabilities. Cyclone Robotics' go-to-market strategy is focused on large, state-owned manufacturing enterprises, but is gradually expanding beyond this market. Process Intelligence is mainly deployed on-premises. Most of its customers are in Asia/Pacific, but it has a small presence in Europe, supported locally. Cyclone Robotics' plans include expansion into overseas markets, launching a SaaS option, and deeply integrating process mining with RPA, BPA and integration platform as a service (iPaaS).

Strengths
- **Market positioning**: Cyclone Robotics focuses on China's process mining market, which is still in its infancy and will experience rapid growth in commercial practice by 2027. Cyclone Robotics concentrates on large enterprises that have a more mature IT infrastructure and complex business processes.

- **Marketing**: Cyclone Robotics emphasizes process mining's ability to systematically discover automation opportunities and verify automation effectiveness. It does so to encourage its existing RPA clients to renew and convert to the new offerings.

- **Task mining**: Cyclone Robotics provides its native task mining capability as a module that process managers can launch easily. Nominated individuals can self-install it on their computers and configure it to capture keystrokes, mouse clicks and cursor positions. All sensitive data is masked and encrypted before it reaches process owners.

Cautions
- **Geography:** Cyclone Robotics' operations are almost exclusively in Asia/Pacific, with only a small presence in Europe. The company does not have a global partner network in Europe and Southeast Asia, although it is working on it. Customers outside Asia/Pacific should test Cyclone Robotics' ability to support operations globally.

- **Offering:** Cyclone Robotics' market responsiveness and innovation are lagging behind those of the general process mining market, mainly influenced by local market conditions. This is exemplified by the company's plans to introduce a commercial SaaS version in 2024. Clients requiring up-to-date process mining capabilities should check their requirements against Cyclone Robotics' capabilities.

- **Operations:** Cyclone Robotics is a small company, but charges premium prices. Higher prices can contribute to the expectation of higher quality and support, which Cyclone Robotics may not be able to provide. Depending upon their maturity, clients should verify that their expectations of Cyclone Robotics' capabilities will justify the premium pricing.

IBM

IBM is a Challenger in this Magic Quadrant. The process mining offering we assessed is IBM Process Mining, version 1.14.1. It fits into IBM's strategy of providing a one-stop shop of AI-powered business automation capabilities, including process mining, RPA, document processing, workflow and decisions. IBM Process Mining can be deployed via OpenShift, SaaS and on-premises through IBM Cloud Paks. Its operations are focused on the U.S. and Europe, supported by both local and global teams. IBM Process Mining customers are mainly in banking, financial services, insurance, IT services, energy and utilities, retail, manufacturing and pharmaceuticals. IBM's plans include conversational process mining and prescriptive analytics driven by generative AI. It also plans an interconnected data model to link data between different processes, and to leverage IBM leadership and integrate with IBM Business Automation Workflow and IBM Instana (IT observability), as well as new revamped analytics.

Strengths
- **Market positioning**: IBM provides a complete solution for intelligent automation. It combines capabilities to automatically analyze processes, identify improvements and corrective actions, and automatically apply the required changes through AI-powered automation. IBM offers an integrated enterprise business process analysis solution, connecting to a dynamic model of the process that considers the wider organizational context.

- **Customer experience**: IBM Process Mining excels in customer experience. IBM process mining received consistently high evaluations in Gartner Peer Insights feedback for integration and deployment, retention rate, and Net Promoter Score.

- **Verticalization**: IBM has subject matter experts (SMEs) with deep knowledge of individual markets (such as finance and manufacturing). It uses these SMEs and global systems integrators to bring its cross (e.g., procure to pay) and vertical (e.g., Maximo and finance process) accelerators to market.

Cautions
- **Automation use case**: Although IBM still supports process mining as a stand-alone offering, it focuses mainly on the intelligent automation and hyperautomation use cases. This automation (RPA, BPA and LCAP) use case is the biggest driver of the adoption of process mining, but it is still only around 55% of all use cases. Potential clients considering use cases other than automation should verify them with the experience level and support that IBM and its implementation partners deliver.

- **Process orchestration**: IBM Process Mining offers process orchestration through Cloud Pak for Business Automation. Potential clients requiring this capability will need to consider a bundle of

separate products.

- **Advanced product capabilities**: IBM has great capabilities in execution and AI, but IBM Process Mining lags behind in advanced analytics, certain GenAI capabilities and linked execution capabilities. Although these are on the roadmap for 2024 and beyond, potential clients searching for these advanced capabilities should check their requirements against IBM's available capabilities.

MEHRWERK

MEHRWERK is a Leader in this Magic Quadrant. The process mining offering we assessed is the mpmX Process Excellence Platform. This combines mpmX analytics with mpmX execution. MEHRWERK combines business intelligence (BI) software and services with process mining technology. MEHRWERK's operations are mainly based in Europe, but are expanding in the U.S. The company's clients are mainly in banking and financial services, insurance, automotive and manufacturing, IT and telecommunications, pharmaceuticals, biotechnology and life sciences, and retail and consumer products. MEHRWERK's plans include applying a human-centric, self-service approach through key features such as AI/ML automation, AI assistant queries, process knowledge support, merging big data analysis and data cloud technology with algorithms, and extending solution marketplaces for swift value realization.

Strengths

- **Market vision**: MEHRWERK believes the market will move toward self-service process mining and autonomous process execution. This trend will lead to much faster adoption of the technology and faster implementation. It will result in active business operations intelligence as the basis for autonomous process execution.

- **Innovation**: MEHRWERK's mpmX provides extended AI (Insight Advisor) that expedites generative, automatic analysis creation with visualizations, narrative outputs and suggested links and measures, based on natural language prompts. It has added an OCR module based on several AI models, resulting in contextual document mining that delivers content-based process information.

- **Data access and management within a platform**: mpmX runs natively on Qlik's BI platform (Qlik Sense, available via SaaS and on-premises), without the need for a licensed Qlik platform. This provides mpmX with all the platform capabilities of Qlik, such as augmented intelligence, natural language processing, self-service, real-time and big data integration, and data governance and its associative engine.

Cautions

- **Geographies**: MEHRWERK has more than 40 offices in Germany, but has a limited presence elsewhere, relying on partners outside Germany. Judging by the company's expansion of its customer base in North America and Asia/Pacific, and its strong partnership with Qlik, we expect MEHRWERK will invest heavily in its global presence in 2024.

- **BI platform:** The combination of several best-of-breed components within a single platform requires more attention, because partner solutions evolve and change. Using Qlik's platform as a base could raise questions with clients that have implemented other BI platforms. Potential clients should check the Qlik environment's degree of overlap (e.g., in reporting) and knowledge required to use it.

- **Process orchestration:** MEHRWERK does not support business operations models from an organizational perspective. These organizational models go beyond business process model and notation (BPMN) models and orchestration in the connected process automation tool (Camunda). Potential clients searching for this organizational approach should check these advanced requirements with MEHRWERK's capabilities.

Microsoft

Microsoft is a Leader in this Magic Quadrant. The process mining offering we assessed is Microsoft Power Automate Process Mining, which is a result of combining the capabilities of task mining and Minit process mining. Microsoft has fully integrated Minit into the Power Automate offering. Power Automate Process Mining is mainly deployed as SaaS, complemented by a supplemental Windows desktop application. Its offering is available worldwide and the main verticals covered include telecommunications, automotive/manufacturing, retail, insurance and healthcare. Microsoft's roadmap is driven by leveraging the user data captured through Microsoft Graph to get a comprehensive view of processes and by supporting the next-generation data analytics stack in Microsoft Fabric. Its roadmap is also informed by its democratization of process mining by utilizing the Process Mining Copilot accessible via Microsoft Teams, Microsoft Outlook, Microsoft Dynamics 365 and other Microsoft Power Platform products, and by bringing orchestration capabilities into Power Automate Process Mining.

Strengths
- **Advanced analytics:** Power Automate Process Mining uses predictive analytics to forecast case outcomes from historical data. Integrated with Microsoft Power BI, it offers in-depth reporting and helps anticipate future states for strategic decision making. The tool offers a simulation engine that uses machine learning for realistic scenario modeling. Copilot can identify processes from data and map them to the required schema. It can also identify key insights, pinpoint bottlenecks and suggest solutions such as Microsoft Power Automate flows and Microsoft Power Apps.

- **Task mining:** The offering includes task mining capabilities through Power Automate for desktop. This enables a unified task recorder for recording desktop tasks, with the ability to pause, edit or delete recorded steps to tailor requirements. It also groups steps into activities with options for manual customization, enabling the data to be business-relevant.

- **GenAI:** Power Automate Process Mining uses GPT-3.5 Turbo from OpenAI and offers Copilot capabilities across the platform. Copilot supports customer identification of processes and mapping, alongside solution recommendations through conversational experience. Microsoft is preparing to transition to GPT-4, which will offer improvements in language processing and understanding.

- **Partner support**: Power Automate Process Mining falls short on a robust partner ecosystem. As such, clients who may need support regarding implementation, configuration or obtaining value should reach out to Microsoft to ascertain whether help can be provided to meet their specific needs.

- **On-premises deployment**: Power Automate Process Mining cannot be deployed on-premises. This may make it unsuitable for those in highly regulated industries or those who are required to keep their data in-house. Customers should reach out to Microsoft to see whether the vendor's offering supports their enterprise requirements.

- **OCPM support**: Power Automate Process Mining does not support OCPM, although this is on Microsoft's roadmap. This limits the tool more than traditional process mining, because OCPM broadens the way that data is collected and processed, and OCPM enables users to see events and objects in all their states along different processes.

mindzie

mindzie is a Niche Player in this Magic Quadrant. The process mining offering we assessed is mindzie Studio, version 2023.332.5. mindzie began by covering the small and midsize business market that the other process mining vendors were not supporting, but has attracted large clients that want to start with smaller implementations. mindzie's no-code platform automatically discovers process variants, ideal processes and conformance issues within the process. It is available as a desktop, on-premises enterprise and SaaS offering. mindzie's operations are predominantly in the U.S., and its main verticals are IT services, healthcare, finance, insurance and manufacturing. mindzie does not offer native task mining, but integrates with Skan, UltimateSuite and others. mindzie plans to continue simplifying user interaction with the platform and making it more conversational with enhanced AI models.

Strengths

- **Pricing**: mindzie offers customers subscriptions of one or more years, as well as pricing per user and connector. It includes maintenance and treats all clients equally with the same level of support. This enables all enterprises, including midsize enterprises and those new to process mining, to get started with minimal upfront costs and full transparency of those costs.

- **GenAI**: mindzie integrates GenAI across the platform, trained on its custom block language for data safety. Users ask questions and AI interprets those questions to provide answers using the right block. mindzie uses a conversational approach to process analysis to ensure safety. It plans to evolve with automated suggestions and multidimensional thinking.

- **Customer experience**: mindzie works directly with its customers to support their process mining efforts, providing access to data scientists to assist with analyzing process data, as well as business consultants to make recommendations. Gartner Peer Insights show that customers value the tool's simplicity for configuring and gathering insights.

Cautions

- **Automation:** mindzie focuses on process discovery and conformance, and does not actively support customers seeking automation opportunities. Potential customers considering automation use cases should verify the extent to which mindzie and its partner ecosystem can support their requirements.

- **Operations:** mindzie is still growing in the process mining market, and this is reflected in its workforce and partner ecosystem. This may inhibit mindzie's ability to support customers with integration, configuration and gaining value from the tool. New customers should verify with the vendor the level of support needed.

- **Vertical/industry strategy:** mindzie's initiatives to expand beyond IT services, healthcare, finance and manufacturing are limited. mindzie mainly operates in North America and relies on its partner ecosystem to reach customers in other regions.

Pegasystems

Pegasystems is a Visionary in this Magic Quadrant. The process mining offering we assessed is Pega Process Mining, version 1.0.0, combined with Pega Workforce Intelligence, version 8.8, for task mining. Both are components of Pega Platform '23. Pegasystems launched Pega Process Mining in June 2023, based on its May 2022 acquisition of Everflow. The process mining component provides the autonomous enterprise with a closed loop that automatically connects opportunity identification to action for continuous improvement. Pegasystems' operations are geographically spread, with most resources in the U.S. It supports clients in all industries, focusing on financial services and insurance, telecommunications, manufacturing, utilities, healthcare and the public sector. Pegasystems' plans include lift-and-shift use cases for the automation platform, better support for OCPM, deepening of the integration between process and task mining, and leveraging GPT to help employees through tasks and assist analysts with understanding insights.

Strengths

- **Continuous process improvement:** Pegasystems is well-positioned to support the full process life cycle. Pega identifies process problems with process mining and task mining; automates issues with Pega RPA, low-code apps and back-end workflow; and orchestrates processes and events through Pega Process Fabric. It continually monitors and analyzes processes to recommend and to automatically act on with Pega Process AI.

- **Market vision and innovation:** Pegasystems has identified process mining as a significant driver in process intelligence, orchestration and autonomous actions. It sees a clear path through a business operations intelligence approach to the autonomous enterprise/business.

- **Pricing model:** Pegasystems has a case-based pricing model that it also uses in other offerings in the automation market. This is per-month pricing, based on analytical capacity measured by the volume of process mining cases analyzed at any point in the subscription period. The minimum analytical capacity is one million process mining cases, with the possibility to add blocks of one million cases. No limit exists on the number of processes or users.

Cautions

- **Automation use case**: Pegasystems focuses on end-to-end process automation and orchestration (RPA, BPA, case management and LCAP), but still supports process mining as a stand-alone offering. The automation use case is the biggest driver of the adoption of process mining, and accounts for approximately 55% of all use cases. Clients considering nonautomation use cases should verify their alignment with the experience and support that Pegasystems and its implementation partners deliver.

- **Sales strategy**: Pega Process Mining targets existing and new clients for its Pega Platform and customer service solutions. Pega Process Mining aims to enable any client to understand the organization's processes, target opportunities for enhancement and foster data-led continuous improvement. Prospects interested in stand-alone process mining should verify their stand-alone requirements with Pegasystems.

- **Customer experience**: Few client references are available because the Pegasystems process mining offering is fairly new in the market. Most of these limited references were positive. Nevertheless, they expressed the desire for some basic elements that are on the roadmap for 2024, such as a deeper integration of process and task mining, easier data integration and a certification program.

Proxverse

Proxverse is a Niche Player in this Magic Quadrant. The process mining offering we assessed is Proxverse Studio, version 2.98. It consists of four main modules: Data Fusion (ETL), Process Mining & Analysis, Process Management, and Low-Code Automation. The Data Fusion and Process Mining modules are available in all packages. Proxverse focuses on Asia/Pacific, and China in particular, but has some clients in Europe. Proxverse has grown considerably since 2021. Proxverse's operations are limited to the Chinese mainland, Hong Kong, Singapore and an office in Germany. Proxverse's major clients are in banking, manufacturing and telecommunications. In 2024, Proxverse plans to integrate GenAI into the product, enabling clients to use natural language to ask process-related questions, write accurate PQL formulas and create analysis components.

Strengths

- **Market promotion in China**: Proxverse hosts industry-specific webinars and workshops on process mining, positioning its team as experts. It creates thought leadership content such as white papers and blogs addressing industry challenges and trends. It distributes this content through traditional media, its website and social media.

- **Co-innovation**: Proxverse innovates strongly with partners. It collaborated with Beijing University of Posts and Telecommunications (BUPT) to create an entire data preprocessing layer using a vector database, with a large language model (LLM) as the basis. The solution provides a customized process knowledge base.

- **Viability**: Although Proxverse is a small company, it can be more agile to respond to market needs, as well as grow to promote process mining in the APAC region. Proxverse will benefit

from the huge growth that the Chinese market is experiencing. We expect this growth will continue.

Cautions

- **Geographies:** Proxverse has a limited presence outside the Chinese mainland, Hong Kong, Singapore and Germany, relying mainly on a limited number of partners in other areas. Proxverse has expanded its customer base in Asia/Pacific, so we expect it will invest heavily in its global presence in 2024. New customers should confirm the vendor's support in the regions where they operate.

- **Operations:** Proxverse is still a small company. It is closely involved with its clients in installation, implementation, close support, troubleshooting, consulting, training, customizations, integrations and execution. Although it charges little for this, it impacts scalability, so new clients should check availability.

- **Offering:** The product still lacks some critical and advanced functionality in the current product offering, contributing to a relative lower assessment on the ability to execute. Proxverse has no task mining capabilities and very basic process orchestration capabilities. Potential clients that need some advanced process mining capabilities should check with Proxverse that it can meet those requirements.

QPR Software

QPR Software is a Visionary in this Magic Quadrant. The process mining offering we assessed is QPR ProcessAnalyzer, version 2023.4. It offers automated one-click root cause analysis, advanced influence and clustering analyses, and machine learning and predictions. It is the only process mining software running natively in the Snowflake Data Cloud, but can operate on top of any data lake using its in-memory engine. QPR's operations are mainly based in Finland. Most of its clients are in Europe, the U.K. and the Middle East. Its clients are in the pharmaceuticals, life sciences, manufacturing, consumer packaged goods, banking, financial services, insurance, retail, high-tech and telecommunications sectors. QPR's plans include extending synthetic event log generation into an innovative AI-based simulation, advanced data augmented modeling and the ability to run QPR ProcessAnalyzer in Linux containers. It also plans to extend the use of Snowflake Data Cloud, which will provide data sharing capabilities across different organizations.

Strengths

- **Market positioning:** QPR views the digital twin of an organization (DTO) use case as aligning and integrating process mining with modeling, and revolutionizing the traditional modeling market. Enabled by process mining technology, modeling as part of a DTO will become a data-augmented and AI-assisted discipline that supports digitalization and related transformation initiatives. This DTO use case is QPR's new positioning.

- **Innovation:** QPR ProcessAnalyzer is the only process mining product to run natively in the Snowflake Data Cloud. This approach brings the use cases and related workloads to where the data is, instead of copying data to a stand-alone island for process mining. The solution

guarantees off-the-shelf scalability, data security and easy data governance. QPR is devising a framework that will enable the mining of end-to-end processes across multiple organizations.

- **Marketing strategy:** QPR puts strategic emphasis on the DTO use case, with a dedicated marketing effort aimed at establishing QPR as a thought leader in this domain. QPR pays special attention to its existing base, implementing account-based marketing to maximize awareness and unlock the potential of DTO within selected accounts.

Cautions

- **Geography:** QPR has a limited geographic presence. It has sales offices in Finland and the United Arab Emirates, and all its support staff are based in Finland. Its partners are mainly regional, with some large international systems integrators such as Tietoevry and NTT DATA. New QPR customers should confirm its support in all the regions in which they operate.

- **Customer experience:** According to customer comments from Gartner Peer Insights, the product needs more implementation and integration effort than most of the offerings in this research. This does not apply to companies that are using Snowflake Data Cloud, where no copying of data or uploading the data into in-memory is required and customers can instantly begin analysis in QPR. New clients that are not using Snowflake Data Cloud should check on partner availability.

- **Limited advanced capabilities:** Some of QPR ProcessAnalyzer's advanced capabilities, such as task mining and connections to execution through automation, are basic. Potential clients should check whether QPR meets their requirements for advanced capabilities.

SAP Signavio

SAP Signavio is a Leader in this Magic Quadrant. The process mining offerings we assessed are SAP Signavio Process Intelligence and SAP Signavio Process Insights, version 17.4. Both are components of the SAP Signavio Process Transformation Suite. SAP Signavio supports full business transformations with its process mining solutions and the SAP Signavio suite, including process modeling and analysis, journey modeling and analysis, process model enhancement, data access and preparation, and process collaboration and governance. SAP Signavio's operations are geographically spread. EMEA, North America and Asia/Pacific are its core markets, and its clients span all industries. SAP Signavio's plans include modelless conformance based on process atoms, embedding SAP data integration capabilities, a large process model (LPM) generating AI-based insights and recommendations to change and improve operating models, and Journey-to-Process Analytics AI (to find the right balance between operational excellence, top-line and customer/employee experience goals).

Strengths

- **Market positioning and vision:** SAP Signavio's process mining solutions are part of an end-to-end transformation suite for process excellence initiatives and business transformation. Adding new perspectives such as experience, resources, people, skills and environmental, social and governance considerations will extend the traditional process mining market. Customer journeys and process observability also will be major themes.

- **Innovation**: SAP Signavio provides an LPM that generates effective AI-based insights and recommendations to change and improve operating models. Process AI uses GenAI technologies based on SAP Signavio's LPM to augment process mining and analysis with advanced capabilities. These include a text-to-query-to-widget, a dashboard AI assistant, a problem space identifier, auto event log enhancement and Journey-to-Process Analytics AI.

- **SAP client ecosystem**: SAP has aligned SAP Signavio with the overall SAP go-to-market approach to interlock new sales plays more strongly with SAP industries, SAP Business Technology Platform and other SAP solutions and programs. A starter pack helps to position SAP Signavio with RISE with SAP customers.

Cautions
- **Pricing:** SAP Signavio has a complex pricing model and two products for process mining. The SAP Signavio Process Transformation Suite also includes user-based products such as SAP Signavio Process Collaboration Hub, SAP Signavio Process Governance and SAP Signavio Journey Modeler. Prospective clients should study each capability and align them with the internal capabilities they require.

- **SAP focus:** Although SAP Signavio supports process mining as a stand-alone offering and its strategy is system-agnostic, since SAP acquired Signavio, its accelerators focus more on SAP-related use cases. Clients considering use cases other than SAP-related ones should check the experience level, available connectors and support that SAP Signavio and its implementation partners deliver.

- **Marketing execution**: SAP Signavio should make it more clear that there is a difference between SAP Signavio Process Intelligence (a general process mining platform solution) and SAP Signavio Process Insights (a process mining platform for SAP, created on the SAP Business Technology Platform). New clients and prospects do not always understand these differences and the consequences of extending one into another.

Skan

Skan is a Niche Player in this Magic Quadrant. The process mining offering we assessed is Skan Process Intelligence, version 3.2.2. Skan offers both cloud and on-premises deployment. Skan uses a combination of process and task mining to derive its process insights, and generates its own event logs through task capture based on user observations. This enables users to continuously monitor process, workforce and application usage metrics. North America is Skan's core market. The main verticals that Skan serves include insurance, banking, financial services, healthcare payers and manufacturing. Skan plans to integrate AI more deeply into its platform for autonomous learning and prompts. It also has plans for autonomous execution to reduce manual task execution, as well as the ability to converse with processes and understand process inefficiencies alongside potential remediations.

Strengths
- **Customer experience:** Skan achieved one of the highest retention rates in this research. It has intensified its commitment to a more customer-centric approach by listening to customer

requirements. Skan has adopted an agile product development approach to address key customer needs. It has strategic plans to implement continuous monitoring for tracking and addressing potential issues that could impact business continuity.

- **Innovation:** Skan introduced askSkan, part of the GenAI-powered ProcessGPT suite, which enables real-time narrative insights to help transform raw data into digestible actions. This will be complemented by Skan's Autonomous Learning and Optimization, an AI-driven system that provides real-time alerts and notifications. Both enhance the product's ease of use and ability to execute decisions promptly.

- **Process discovery:** Skan uses process and task mining to derive process insights at scale, gathering a complete picture of end-to-end processes, along with all required documentation. The Skan Virtual Assistant, installed on the user's workstation, captures all information, including that from the mainframe. This generates event data and transforms it into structured event logs, without the need for integration into back-end event logs and application databases.

Cautions

- **Operations:** Skan is still a small company with a growing workforce and partner ecosystem to meet its growth targets. Customers seeking assistance with installation, implementation, close support and troubleshooting, alongside consulting, training and execution, should verify the availability of resources.

- **Geography:** Skan's sales and marketing operations are focused on North America, with little presence in EMEA. Most of its support staff are in Asia/Pacific, with some in North America. Skan offers its product in English only, with plans to expand into Spanish and Japanese on its roadmap. Potential customers should confirm Skan's support in the regions where they operate.

- **Real-time monitoring:** Skan's event-driven microservices architecture offers scalability advantages, but brings complexities in managing event ordering. Special attention is crucial, especially for microservices relying on event sequencing, to ensure adequate hardware is available at peak usage so that all metrics remain real-time, especially for operations-critical use cases.

Software AG

Software AG is a Leader in this Magic Quadrant. The process mining offering we assessed is ARIS Process Mining, version 10 SR23. It can be bought stand-alone or integrated with the full ARIS Suite. Customers with the ARIS Suite can discover processes, which are then transferred to the ARIS repository to serve as a starting point for process redocumentation, transformation and improvement initiatives. ARIS Process Mining is mainly offered as SaaS, but can be delivered on-premises with a similar pricing structure. Software AG's operations are geographically spread, and its clients span all industries, but it focuses on banking, financial services and insurance, retail, manufacturing, government and healthcare. Software AG's plans include combining process repositories with process mining and LLMs to create a fully AI-accessible DTO. It also plans a deeper drive for autonomous actions, such as machine-learning-based predictions to trigger preventive actions.

Strengths

- **Process orchestration:** ARIS Process Mining enables the ARIS repository to act as a DTO. This gives a view of the performance of an organization's business operating model, providing a single source of truth. Using the ARIS suite as the central repository, many capabilities can be used to discover or build interdependencies between processes that must be executed.

- **GenAI:** ARIS Process Mining uses GenAI through the ARIS AI Companion to enable users to interact and converse with their processes. This includes ideation for dashboard components and KPIs, as well as to create connections to source systems. ARIS AI Companion can also propose automation projects or create detailed plans within the ARIS platform to improve overall processes.

- **Customer experience:** The ARIS community has over 750,000 members who share best practices, news and blogs. Software AG engages customers for product feedback, conducts prototype validation sessions and consults users to incorporate their insights into its roadmap. Feedback in Gartner Peer Insights shows that users particularly appreciate the seamless implementation and the easy generation of insights.

Cautions

- **Non-ARIS clients:** Software AG packages many of its extended capabilities (process repository, simulation, and process analysis) as different offerings. Non-Software AG clients considering specific process mining capabilities should check the use cases and capabilities they need against the capabilities in ARIS Process Mining as a stand-alone offering.

- **Task mining:** Software AG supports task mining through ARIS Robotic Process Discovery. This uses screen scraping to capture user steps for the creation of task logs. This approach has limitations, such as not using the data from the operating system to obtain a complete, granular understanding.

- **Marketing execution:** Software AG's marketing has focused on promoting the ease of use of process mining to generate insights, as well as GenAI's possibilities. But for 2024, it will place greater emphasis on promoting the benefits of the process mining that is integrated into the ARIS Suite, which will enable customers to expand the use and potential applications of process mining technology. Customers seeking a stand-alone tool should confirm their requirements before engaging with Software AG.

StereoLOGIC

StereoLOGIC is a Niche Player in this Magic Quadrant. The process mining offerings we assessed are StereoLOGIC Integrated Task & Process Mining Platform, version 2023, and StereoLOGIC Unattended Task Mining, version 2023. StereoLOGIC captures system-based events and user-interface-based information without the need to install anything on the employee's workstation. It offers a task-driven, complete picture of reality and can handle employee productivity comparisons or workload optimization of different processes and related tasks. StereoLOGIC's operations are based in Canada and the U.S. Its clients are mainly in North America in banking,

financial services, insurance and defense. StereoLOGIC's plans include increasing its innovation pipeline by expanding its customer advisory board and developing a client connection ecosystem.

Strengths

- **Task mining:** StereoLOGIC is unique because it starts from a task mining perspective. It captures events on an end-user desktop, terminal or mobile device, and applies several patent-based engines (data extraction, data recognition, instance recognition and image recognition) to derive the processes. StereoLOGIC also captures transactional data.

- **Data access and preparation:** Because of its task mining approach, StereoLOGIC does not need application connectors or data to be prepared before performing the task and process analyses. It includes activities and data that are handled in local front-office applications, such as Microsoft Excel and collaboration tools. This leads to fast implementations and results being available in days or weeks.

- **Continuous monitoring:** StereoLOGIC uses a proprietary pattern recognition technology to compare process performance with a discovered or improved process model. It supports this with a comprehensive dashboarding capability that enables process owners to monitor process conformance by business area, team or user.

Cautions

- **Task mining orientation:** The solution's possible bias when deducting processes from a task level will be minimal if the tasks observed contain the start and end of a process, are well-understood, and don't have too many interrelated activities based on exceptions. Clients considering process mining should understand that StereoLOGIC is different from most task-based process mining tools and overcomes these issues by capturing non-desktop-based system events.

- **Geography:** StereoLOGIC's sales and marketing operations are mainly in North America, with some presence in EMEA, and all its support staff are based in Canada and the U.S. It has a limited number of partners, but guarantees worldwide support for all products without the need for consulting partners. Prospective StereoLOGIC customers should confirm the vendor's support in all the regions in which they operate.

- **Operations:** StereoLOGIC is a small company. It is closely involved with its clients in delivering installation, implementation, close support and troubleshooting, consulting, training, customizations and integrations, and execution. This is at no additional cost, but it has an impact on scalability, so prospective clients should verify availability.

UiPath

UiPath is a Leader in this Magic Quadrant. The process mining offerings we assessed are UiPath Process Mining, UiPath Task Mining and UiPath Communications Mining, version 2023.6. All are components of the UiPath Business Automation Platform. UiPath Automation Hub is an additional component of this platform. UiPath Process Mining, Task Mining, and Communications Mining look at all attributes of two or more related processes and tasks in a single model. The analysis of

these multiple interactions creates holistic insights and enables data-driven decisions on how to optimize business workflows. UiPath's operations are spread worldwide. Its clients span all industries including financial services, insurance, manufacturing, healthcare, professional services and government. UiPath's plans include expanding its library of prebuilt solutions, enhancing support for process orchestration, and expanding UiPath Autopilot for Process Mining, which connects advanced process analysis with GenAI.

Strengths

- **Market positioning**: UiPath's vision for the market is to help clients go beyond insights. It wants them to achieve a state that it calls Continuous Discovery, in which organizations continuously monitor and optimize their processes, automations, systems, and resources. This vision encompasses all the use cases covered in this evaluation.

- **Execution support**: UiPath's ability to combine holistic process intelligence with execution and AI-powered automation is a key differentiator. Users can submit automation ideas surfaced from Process Mining into Automation Hub. From here, execution can happen on a task level (human action or RPA bots) or on a process level (BPMN process models, stateful workflow execution, user experience/app development).

- **Automation**: For UiPath, process mining and automation execution go hand-in-hand for process transformation, business model innovation and continuous monitoring of financial impact and operational KPIs. UiPath usually bundles Process Mining with the other elements of its platform (RPA, AI, iPaaS, LCAP, IDP and application testing) to drive hyperautomation strategies.

Cautions

- **Automation use case**: UiPath puts automation at the heart of its platform. Automation is the biggest driver of the adoption of process mining, but still accounts for only approximately 55% of all use cases. Prospective clients considering use cases other than automation should verify their use cases with the experience level and support that UiPath and its implementation partners deliver.

- **OCPM**: UiPath plans to add support for full OCPM to help clients better understand the interdependencies between processes. Clients who seek to go beyond mining individual processes and require a more holistic process intelligence across their enterprise should check that UiPath can meet these requirements.

- **Advanced analytics**: Many advanced analytics capabilities (such as predictive process analytics beyond automation, prescriptive analytics, advanced scenario testing and simulation, and decision modeling) are still on UiPath's roadmap. However, UiPath expects to deliver many of these through UiPath Autopilot for Process Mining. Prospective clients should check that UiPath's current advanced analytics capabilities match their requirements.

UpFlux

UpFlux is a Niche Player in this Magic Quadrant. The process mining offering we assessed is UpFlux, version 4.7. UpFlux is available as both a cloud-based and on-premises offering. UpFlux

has historically had a sole focus on growth in Latin America, but now has partner offices in both North America and Europe. Most of its clients are in Latin America and are in healthcare, banking, IT services, telecommunications and consumer goods. UpFlux's plans include applying LLM to guide process diagnostics and required actions, improving root cause analysis, increasing its rule engine capabilities, its CEP capabilities, and adding capabilities in the action engine to enable faster automation.

Strengths

- **Customer feedback:** Feedback from Gartner Peer Insights indicates that this vendor has one of the highest levels of client satisfaction among all process mining vendors. Clients particularly note ease of use and value for money as key strengths. Reported customer retention rates also indicate a high level of value delivery.

- **Market understanding:** UpFlux demonstrates a solid understanding of the future direction of the process mining market and integrates these insights into its roadmap. UpFlux is focused on key relevant features, including further integration with automation partners and building AI capabilities into the product.

- **Customer segmentation:** UpFlux has executed a focused strategy within a narrow set of verticals. This has enabled it to build deeper expertise and use cases than some of its competitors in the region. This eliminates the risk associated with a broad industry strategy, where growth can outpace the ability to deliver value.

Cautions

- **Ability to scale:** UpFlux is still a small company. It has strong expertise in healthcare and financial services, but may have limited experience in other verticals. Clients from outside these verticals should consider the need for industry-specific expertise or use cases as they explore UpFlux.

- **Geography:** UpFlux has focused on Latin America, and most of its customers and use cases are from that region. Prospective UpFlux customers from outside Latin America should check the level of support available for the product.

- **AI focus:** UpFlux promotes a strong focus on AI as central to its process mining offering. Although the product supports a humanlike text response to 1,600 process-related queries, these are focused on the order-to-cash process in its current state. Prospective clients should compare specific GenAI capabilities against their process needs when considering UpFlux.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

- Cyclone Robotics

- mindzie

- Proxverse

- Skan

- Upflux

Dropped

- BusinessOptix — BusinessOptix is no longer in this year's Magic Quadrant because it no longer focuses on process mining as a stand-alone offering and therefore didn't meet the minimum revenue threshold.

- Fluxicon — This year Fluxicon did not meet the minimum revenue threshold.

Inclusion and Exclusion Criteria

To qualify for inclusion in this Magic Quadrant, each vendor had to meet the following criteria:

Performance: The vendor had to have realized in 2022 *one* of the following:

- 2022 audited/reported annual tool licensing revenue of over $5 million

- 2022 audited/reported annual tool licensing revenue of over $2.5 million and at least 40% year-over-year growth

- 2022 audited/reported annual tool licensing revenue of over $2.5 million and at least 15 net new logos in 2023

- Been mentioned as a considered vendor for evaluation in 10% of vendor-related Gartner inquiries in this market for the past two years

Geographic availability: The vendor had to have:

- Active customers buying process mining tools in the 12 months preceding the start of this research, in at least two of the following major global regions: EMEA, Asia/Pacific, North America and South America

Process mining market focus: Vendors had to satisfy the following criteria:

- Independent software vendors had to have tools positioned to address the market for process mining tools (using Gartner's definition of process mining). Such tools must address all four common use cases, possess all the common features and most of the mandatory features described in the Market Definition/Description section of this research.

- Have an active presence in the process mining market as demonstrated on their website, Gartner Peer Insights forum, social media and direct/indirect marketing materials that explicitly mention process mining.

- The product version on which they based their questionnaire responses and use-case demos must have been generally available to all customers for purchase since 1 July 2023.

Honorable Mentions

The following vendors are not included in this research because they do not meet one or more of the inclusion criteria. All are active in the process mining market and, sometimes, compete against the vendors covered in this Magic Quadrant:

- **Arkturus** — Vendor that provides process mining predominantly in New Zealand and Australia.

- **BusinessOptix** — Vendor that sells process mining predominantly bundled with its Process Transformation Suite.

- **Datricks** — Vendor that focuses on auditing and compliance, risk management and process governance.

- **DCR Solutions** — Vendor that targets companies in heavily regulated industries to digitize their processes, ensuring compliance and transparency.

- **Decisions** — Vendor in business process automation that acquired process mining capabilities.

- **Fluxicon** — Vendor of Disco, a popular stand-alone, analysis-focused process mining tool.

- **iGrafx** — Vendor that has acquired and integrated process mining and is optimizing its new offering.

- **inverbis** — Vendor that has been incubated by the University of Santiago de Compostela and offers a process mining platform.

- **process.science** — Vendor that delivers process mining on top of BI platforms, such as Power BI, Qlik Sense and Tableau.

- **PuzzleData** — Vendor that is currently expanding its process mining offering outside Asia/Pacific and is focusing on predictive analytics.

Evaluation Criteria

In Magic Quadrants, Gartner positions vendors on two axes: Ability to Execute and Completeness of Vision. These axes reflect numerous criteria that measure each vendor's performance and its future vision. Vendors receive evaluations based on Gartner's methodology for Magic Quadrants. Vendors are invited to provide data for the evaluation criteria via questionnaires and briefings, but evaluations also reflect the results of Gartner customer insights and information gathered from client inquiries.

Ability to Execute

We evaluated the vendors' Ability to Execute in the process mining tool market by using the following dimensions and criteria.

Product or Service: We assessed what the vendor's process mining offering delivers to process mining practitioners and how it does so. These offerings may be packaged as a single product, multiple products, a platform or, in many cases, stand-alone products that are also bundled as a component in a broader platform. In the case of broader platforms, we assessed only the process mining component and mentioned the opportunities to connect to other components of the platform. We assessed current capabilities, quality and feature sets, as defined in the Market Definition/Description section. Vendors may offer these capabilities natively or through agreements/partnerships with OEMs. Our product assessments explore how well the products meet the core and tangential capabilities and support the use cases.

Overall Viability: We assessed the organization's overall financial health and the business unit's financial and practical success. We also assessed the likelihood that the organization would continue to offer and invest in the product, as well as advance the product's position within the organizational product portfolio. We looked at all forms of growth, including organic growth, as well as acquisitions and the securing of additional funding. We valued organic growth more highly than other types of growth.

Sales Execution/Pricing: We assessed the vendor's sales execution, including presales activities and the structure that supports them. We included responsiveness in sales engagement, deal size and management, pricing and negotiation, presales support, scalability and the overall effectiveness of the sales channel. We also assessed the clarity of the vendor's pricing.

Market Responsiveness and Track Record: We considered the vendor's history of responsiveness to customer requests and changing market needs, including its overall track record in the field. We gave high marks to vendors that were able to respond quickly and change development and/or company direction to meet the needs of an evolving marketplace.

Marketing Execution: We assessed the vendor's programs, campaigns and events designed to deliver its message to influence the market, promote the brand and business, increase product awareness, and establish a positive identification with the product/brand and organization in the minds of customers. We assessed these programs for their clarity, quality, creativity and efficacy.

Customer Experience: We sought evidence of how products and services enabled customers to achieve anticipated results. We gave high marks for an excellent track record of successful implementations. We looked for clearly articulated mechanisms for ensuring customer success and support for customers, and at what cost. We examined organizational responsiveness, the availability of user groups and service-level agreements. We also factored in customers' experiences doing business with the vendor and their perceptions of the organization.

Operations: We evaluated the vendor's ability to meet its goals and commitments. We considered the quality of the organizational structure (such as skills, experiences, programs, systems,

applicable standards, the underlying infrastructure and other vehicles that enable effective and efficient operations).

Table 1: Ability to Execute Evaluation Criteria

Evaluation Criteria ↓	Weighting ↓
Product or Service	High
Overall Viability	High
Sales Execution/Pricing	Medium
Market Responsiveness/Record	Medium
Marketing Execution	Medium
Customer Experience	High
Operations	Low

Source: Gartner (April 2024)

Completeness of Vision

We evaluated the vendors' Completeness of Vision in the process mining tool market by using the following dimensions and criteria.

Market Understanding: We evaluated each vendor's understanding of customer needs and how it translated that into products and services. We looked for vendors to demonstrate a clear vision of their market. We also assessed how they listened for and understood their customers' underlying needs, and how they used that understanding to shape or enhance the market.

Marketing Strategy: We sought clear, differentiated messaging that the vendor consistently communicated internally and externalized through its website, social media, advertising, customer programs and positioning statements. We included differentiating strategy based on regions, specific countries and buyer personas, and ways to measure and adapt the strategy.

Sales Strategy: We wanted to understand the vendor's sales strategy and how it used direct and indirect sales, marketing, service and communication. We also examined the vendor's use of, and reliance on, partners to extend its scope and reach, focusing on the levels of expertise and technology required, as well as the partners' services and customer base. We also included target customer personas and sales strategies differentiated for the vendor's context, size, level of maturity and geographic locations.

Offering (Product) Strategy: We explored the vendor's approach to developing a compelling product and service vision, with an emphasis on market differentiation, functionality, methodology and features as they mapped to current and future requirements.

Business Model: We assessed the design, logic and execution of the vendor's business proposition to achieve continued success. We explored support for customers in different deployment modes, the vendor's business capabilities, its overall value propositions, related profit models and the resources at its disposal.

Vertical/Industry Strategy: We assessed the vendor's strategy to direct resources (sales, product and development), skills and offerings to meet the specific needs of individual industry segments. We examined any focus on particular industry verticals and associated standards, and revenue performance in the vendor's top sectors.

Innovation: We explored the vendor's innovation vision, examining its resources, expertise and capital for investment. We looked for a strong product vision that pushed the market forward, while considering the disruptive and opportunistic forces of digital on businesses. We also considered the vendor's ideas for innovation and market development.

Geographic Strategy: We examined the vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside its "home" geography, either directly or through partners, channels and subsidiaries, as appropriate for that geography and market.

Table 2: Completeness of Vision Evaluation Criteria

Evaluation Criteria ↓	Weighting ↓
Market Understanding	High
Marketing Strategy	Medium
Sales Strategy	Medium
Offering (Product) Strategy	High

Evaluation Criteria ↓	Weighting ↓	
Business Model	Medium	
Vertical/Industry Strategy	Low	
Innovation	High	
Geographic Strategy	Low	

Source: Gartner (April 2024)

Quadrant Descriptions

Leaders

Leaders have a deep understanding of market realities, a track record of success and an ability to influence the market's direction, along with an ability to attract and keep a growing customer base.

In the process mining platform market, Leaders understand, facilitate and support the diversity of use cases (operational excellence, audit and compliance, automation, digital transformation, strategy to execution and customer excellence). Leaders also add other functionality, products and services to core process mining offerings.

Leaders demonstrate a market-leading vision, but also the Ability to Execute on that vision. In this Magic Quadrant, nine vendors have sustained excellence in both execution and vision for long enough to demonstrate effective leadership.

A Leader is not always the best choice of vendor. A focused, smaller vendor can provide excellent support and commitment to suit individual needs. Other vendors may provide a certain capability — such as a focus on a particular industry, a better cost-performance ratio, a specific use case, or a commitment to specific features or functions — that is important to an organization. This more focused type of vendor would not appear as a Leader in the overall process mining tools market. However, within a specific market segment or for a particular use case, it may well be treated as one.

Challengers

Challengers excel in their ability to attract a large user following, but this ability is limited to a subset or segment of the market. For that target audience, Challengers are effectively Leaders, but

that specificity presents a barrier to adoption for those outside that subsegment. For instance, in the process mining platform market, a Challenger may have a strong, proven presence or following in the automation segment, but because of this focus, it may lack sophistication in the evolving use cases or advanced functionality for other use cases in this market.

In this year's Magic Quadrant, one vendor acquired strong process mining capabilities but focused on the use case for automation, making it the only Challenger. Alternatively, a Challenger might understand all use cases well and achieve a strong following in its home market, but still struggle to deliver the same levels of success on a global scale.

Although Challengers are typically of significant size with significant financial resources, they may lack elements of the vision we expect, innovative ideas and plans, or an overall understanding of market needs. In some cases, Challengers may offer products that dominate a large, but shrinking, segment of the market. Challengers can become Leaders if their vision develops. Large companies may move between the Challengers and Leaders quadrants as their product cycles and market needs shift.

Visionaries

Visionaries are the innovators driving the market forward by responding to emerging, leading-edge customer demands and by offering new opportunities to excel. Typically, these vendors appeal to leading-edge customers and may even have minimal mainstream presence or name recognition within this market. Their ability to deliver sustained and dependable execution in the mainstream enterprise market is not sufficiently tested or has not yet reached the required level of awareness.

In this year's Magic Quadrant, there are two Visionaries. Visionaries can eventually grow to become Leaders. Alternatively, they may decide to limit their target markets to focus on their core competencies, core technologies or existing customers, or excel in a new market and become Niche Players in the process mining platforms market. They could also develop their specialties to advance in execution and become Challengers.

Niche Players

Niche Players operate in a subsegment of a market, or they have a limited ability to innovate or outperform other vendors in the wider market. This limitation may result from a focus on a particular area of functionality, vertical industry or region, or because they are new entrants. Alternatively, Niche Players may struggle to remain relevant in a market that is moving away from them.

Niche Players may have broad functionality, but limited implementation and support capabilities, and relatively limited customer bases. Niche Players can often represent the best choice for a specific category of buyer or for a particular use case. They typically offer specialized expertise, focused support practices, flexible terms and conditions, lower costs, and greater dedication to a particular market segment and its customers.

The process mining platform market has six Niche Players. Some of these vendors have acquired process mining capabilities recently, offer them as stand-alone offerings, and focus on a specific

case (e.g., the automation use case), but lack execution because the acquisition was so recent. Other Niche Players target a certain type of process, such as ad hoc case-based work, and need additional functionality to focus on all process types, or they provide only stand-alone capabilities.

Some Niche Players are poised to improve their Ability to Execute and enterprise features, enabling them to evolve into Challengers. Others will discover innovative solutions that attract interest beyond their niche segments, emerging as Visionaries. Some will strive to strengthen and broaden their businesses to challenge the Leaders. In this fast-evolving and consolidating market, opportunities exist for all.

Context

This Magic Quadrant focuses on the placement of process mining platform vendors in the market, not specifically on the capabilities of their offerings. Only two of the 15 evaluation criteria in this Magic Quadrant relate to product or service functions. The other 13 evaluation criteria focus on the vendors' ability to meet the requirements of this market (for details, see the Inclusion and Exclusion Criteria and Evaluation Criteria sections).

As part of our evaluation process, we used four key use cases that we believe are important to a process mining audience, that vendors must support to remain relevant in the process mining platform market.

Use Case 1 — Improving Processes by Algorithmic Process Discovery and Analysis

Process mining provides visibility and understanding of actual business operations and processes by applying a set of algorithms to events. This results in highly adaptable, highly maintainable and highly validated process models.

Besides identifying process inefficiencies, this technique delivers insight into where to improve operations (for example, in a digitalization initiative) and how to attain targeted business outcomes. By supporting process efficiency and effectiveness, process mining tools are key enablers of process improvement initiatives and their related disciplines.

In this use case, data scientists typically support process improvement teams to discover, analyze, improve and optimize processes using methodologies such as: Kaizen (lean); plan-do-check-act (total quality management); and define, measure, analyze, improve and control (DMAIC [Six Sigma]).

Process mining is highly complementary to the traditional business process analysis area. It enables business process analysts to document, analyze and streamline, and redesign complex processes at a conceptual and logical level, regardless of any planned automation.

Use Case 2 — Improving Auditing and Compliance by Algorithmic Process Comparison, Analysis and Validation

Most organizations have internally defined standard operating procedures, policies, work instructions and best practices incorporated into enterprise applications, such as ERP and CRM.

Process mining helps validate or audit whether actual operations conform with these defined operations. More-accurate assessments of process deviations and compliance issues, such as segregation of duties, help manage these risks and communicate findings in an audit report. This also helps ensure the reliability of external financial reporting and compliance with external laws and regulations. In these cases, process mining stakeholders can be found in financial management and in risk and compliance teams. Another variation of this use case is the comparison and analysis of the same processes across different business units, subsidiaries or even countries (comparative process mining).

Use Case 3 — Improving Process Automation by Discovering and Validating Automation Opportunities

Process automation initiatives have been delivering highly improved efficiencies, but they have resulted in limited sustainable business value because of the assumption that the actual data is available only after automation has been completed. This leads to less accurate process designs as input for the process automation. Process mining delivers the actual operational data before running into automation and supports making a more-accurate business case for the improvement of business outcomes.

Process mining will help business analysts discover and assess the opportunities for process automation. Quantifying the value of automating a process (or task) is huge. It effectively creates the business case for automation, which can be difficult for some clients to create on their own.

Task-level process automation, such as RPA, has often missed the process context and has not provided awareness of the changes that occur to the processes in which these tasks are embedded. Process mining will help in two ways. First, it can discover the opportunities for task automation in a more holistic process context. Second, it can connect automated tasks to its process context, so that business process changes can be anticipated and reflected in these tasks.

In both process automation and task automation, the role of task mining cannot be underestimated.

Use Case 4 — Supporting Digital Transformation by Linking Strategy to Operations and Creating a Resilient Organization

If we shift the scope of process mining to the operational and organizational level, it is a small step to link these operational insights to big strategic initiatives, such as digital transformation and digital business. This is a growing use case that provides visibility, analysis and understanding of business operating models that provide (near) real-time information to all end users on how they are performing and what could be improved. In some cases, it also helps end users think about digitalization opportunities.

If we consider the basics of process mining to be event sequencing, depending on where the events come from, we can recontextualize the techniques as creating:

- Client journey maps (events from client interactions)

- Supplier journey maps (events from supplier interactions)

- Product life cycle maps (events from milestones in a product life cycle)

- System or application interaction maps

- Journeys of how business capabilities are operationalized to provide value

Combining these extensions of process mining could create a kind of "business mining." This could become an essential part of any business transformation initiative. It could help guide digital business initiatives by providing the data connection parts of a digital twin of an organization.

Market Overview

Market Size

According to a Gartner study published in 2024, **Market Share: All Software Markets, Worldwide, 2023**, global process mining software revenue grew 40% in 2023 and is projected to grow to $1.5 billion by 2025 at a compound annual growth rate (CAGR) of 33% from 2020 through 2025. The key drivers continue to be accelerated digital transformation efforts, growing process visibility requirements and increasing demands for business operations resilience.

Market Direction

Due to its industry- and object-agnostic nature, process mining has many application areas and can be used in a vast number of use cases. Indeed, process mining can be applied to any horizontal or vertical operation. If we abstract the technique as "sequencing events based on patterns," it opens up a whole new audience. For example, if process mining tracks clients and their interactions, as well as their touchpoints with the organization, as the main object, rather than an order, invoice or request, then this can be seen as "customer journey mining."

Therefore, Gartner sees three directions in which the process mining platform market will evolve.

1. Business Operations Intelligence or Operational Intelligence

An extended version of the pure-play process mining market with the critical and tangential capabilities we have mentioned will gradually move into a platform for business operations intelligence. This platform will provide a dynamic model of any organization that relies on operational or other data. It will enable the organization to understand how the organization operationalizes its business model, connects with its current state, responds to changes, deploys resources and delivers expected customer value.

This platform will combine all modeling, mapping, mining and monitoring, and support the execution of these models in real-life business operations. Business operations are the combination of processes, interactions and activities that result in products, services and

information, and ultimately provide value to the organization's customers and stakeholders. It will be the implementation of the design pattern that Gartner has, for years, defined as a DTO or a digital twin for business operations.

Most of the Leaders and Visionaries in this Magic Quadrant acknowledge this evolution.

2. Market Consolidation and Acquisitions

Models are strategically important in modern business and their use is growing. Their capabilities are a good fit for many other application vendors (task automation, business process automation, service management, ERP and CRM). This means the process mining platform market remains an attractive expansion opportunity for vendors in these adjacent markets. We expect that vendors in these adjacent markets will continue buying process mining platforms or launching their own.

Some of the Leaders, Challengers and Niche Players in this Magic Quadrant have set the example.

3. Specialized/Focused Solutions

There will be a vast market for specialized or focused vendors. They could specialize in vertical solutions, horizontal solutions or specific market segments. Vertical solutions could include a certain quality process or an external auditing application. Horizontal solutions could include financial processes, or supply chain or logistics subprocesses. Specific market segments could include the small and midsize business market, or stand-alone process mining tools.

Some of the Niche Players in this Magic Quadrant are specialized vendors.

Market Adoption

Gartner sees six main drivers for the adoption of process mining.

1. Digital Transformation

Digital transformation drives growth in business users' awareness of the benefits of analyzing and understanding their own processes and business operations in a broader enterprise context (see [Executive Essentials: Advance Business Operations to Achieve Digital Business Acceleration](#)). This is occurring as digital business and digital transformation have become major themes, and because processes are important constituents in the operationalization of these digital business initiatives. Furthermore, in this era of digital business, technology innovation leaders need a way to reflect on how these new technological capabilities can provide value to the business and, ultimately, to the customer. Again, it's here that analyzing business operations, processes and customer interactions can show how and where to activate these capabilities to create business value.

2. AI and GenAI

Algorithms and several waves of AI have been at the core of computing for decades. However, the ability to develop algorithms that act on vast amounts of data to identify patterns creates new

opportunities (see **2024 Planning Guide for Analytics and Artificial Intelligence**). In the digitalized economy, business algorithms deliver new sources of value in business ecosystems. With the use of AI and advanced machine learning algorithms, data acquires meaning, and new and powerful insights can be derived from it.

Process mining is a good example of this data science in action. It shows how algorithms can be used as a mechanism to capture knowledge and insight in a packaged form that can be simply reused in a consistent fashion.

GenAI is poised to transform the landscape of process mining. In an era defined by data-driven insights, GenAI will augment how organizations use process mining to uncover hidden patterns, optimize operations and make informed decisions.

GenAI's impact on process mining can be categorized into three key areas, each with its own set of use cases (see **The Impact of Generative AI on Process Mining**). GenAI-augmented process mining will elevate data discovery by automating tasks such as data cleaning, gaining insights from unstructured data and synthesizing data. It will improve real-time monitoring and process optimizations through proactive anomaly detection, improved recommendations and adaptive process modifications. GenAI will also play a significant role in enhancing explainability and understandability by adopting a conversational and interactive approach, ultimately making process mining more accessible to a wider audience.

3. Task Automation (RPA)

In most cases, tasks are part of processes and operations for which change is the most common characteristic. By accurately assessing the processes to which these tasks belong, we can identify areas in the organization where much effort is wasted in repetitive tasks. Then, we can see whether these tasks can be partly or fully automated with RPA. This is where process mining can complement RPA to offer a wider context and help implement this task automation. This results in long-term sustainable business value and avoids the shortcomings of a short-term perspective focused on large, one-off cost savings.

4. Hyperautomation

Organizations have a tremendous amount of "collective" debt (technical, process, data, architecture, talent, security and social) that significantly impacts their value proposition. The root cause is an extensive and expensive set of business processes underpinned by a patchwork of technologies that are often not optimized, lean, connected, consistent or explicit. Organizations must deliver end-to-end automation by combining complementary technologies to augment business processes. Gartner calls this "hyperautomation" (see **Beyond RPA: Build Your Hyperautomation Technology Portfolio**).

Process mining plays a fundamental role in creating visibility and understanding before automation. It also visualizes how different islands of automation are connected, and how continuously implemented and connected automation can be improved through its monitoring capabilities. The concept of process observability is also gaining much attention.

5. Sustainability

In today's digital era, process-enabling technologies such as process mining offer comprehensive transparency into business processes. They act as a digital X-ray for the entire enterprise, uncovering bottlenecks, deviations and compliance issues, while showcasing the flow of optimal processes. This not only enhances sustainability objectives by revealing and optimizing operational inefficiencies, but also minimizes resource waste, reducing an organization's environmental impact through improved process transparency and optimization.

6. Business Operational Resilience and Autonomous Business Operations

Operational resilience is a set of techniques that enable people, processes and information systems to adapt to changing patterns. It is the ability to alter operations in the face of changing business conditions. Operationally resilient enterprises have the organizational competencies to ramp up or slow down operations to provide a competitive edge and enable quick and local process modification.

To enable enterprises to adapt, operational resilience uses output from the "sense" and "model" disciplines, and returns information that serves as feedback that improves these activities as well (see Building a Digital Future: Autonomic Business Operations).

The techniques underlying process mining provide a new and enhanced way to encompass the sense and model capabilities. Based on available day-to-day operational data, process mining continuously seeks and finds the relevant objective operational data. The advanced process mining algorithms then provide an accurate model of the organization's way of working in a format that anyone in the organization can understand. This ensures that everybody can be engaged in the change initiative. Furthermore, it enables continuous adaptation and improvement because, after the change, the new operational data will give insights into the new way of working.

Evidence

Process Mining Manifesto, IEEE Task Force on Process Mining.

W. van der Aalst, "Process Mining: Data Science in Action," Springer Verlag, 2016.

W. van der Aalst and J. Carmona (Eds), "Process Mining Handbook," Springer Verlag, 2022

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business

unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.