

The Forrester Wave™: Dynamic Case Management, Q1 2016

The 14 Providers That Matter Most And How They Stack Up

by Craig Le Clair
February 2, 2016

Why Read This Report

In our 21-criteria evaluation of the dynamic case management (DCM) market, we identified the 14 most significant software vendors — Appian, bpm'online, Column Technologies, DST Systems, Eccentex, IBM, Isis Papyrus, Lexmark Enterprise Software, MicroPact, Newgen Software, OnBase by Hyland, OpenText, Pegasystems, and TIBCO Software — and researched, analyzed, and scored them. The evaluation focused on providers' adaptive, analytics, and mobile features, all critical to helping enterprises tackle increasing volumes of varied and unstructured work. This report helps enterprise architecture (EA) professionals select the best providers to meet their unique needs.

Key Takeaways

Pegasystems, Appian, And IBM Lead The Pack

Forrester's research uncovered a market in which Pegasystems, Appian, and IBM lead the pack. Lexmark Enterprise Software, TIBCO Software, OnBase by Hyland, Isis Papyrus, Newgen Software, OpenText, Eccentex, and DST Systems offer competitive options. bpm'online, MicroPact, and Column Technologies lag behind.

EA Pros Are Looking For Case Platforms To Support Knowledge Workers

The nature of work is transitioning from a production- and task-driven orientation to a knowledge- and context-driven one. The DCM market will continue to grow as more EA professionals see DCM as a way to address their top challenges.

Analytics, Information-Led Design, And Runtime Evolution Are Key Differentiators

As workflow and business process management (BPM) become outdated and increasingly ineffective for less-structured work patterns, providers that offer improved analytics and information modeling will emerge as leaders.

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Forrester conducted executive strategy briefings and product demonstrations in October and November 2015 with 14 vendor companies: Appian, bpm'online, Column Technologies, DST Systems, Eccentex, IBM, Isis Papyrus, Lexmark Enterprise Software, MicroPact, Newgen Software, OnBase by Hyland, OpenText, Pegasystems, and TIBCO Software.

Related Research Documents

[Choosing Between Specialist Solutions And Dynamic Case Management Platforms](#)

[TechRadar™: Digitizing Operational Processes, Q2 2015](#)

[Vendor Landscape: BPM Platforms For Digital Business](#)

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Products Reduce Complexity And Improve Packaging

Eliminating routine production tasks in customer service, investigations, or nonroutine incidents is not the most effective path for addressing process gaps. To improve customer experience, firms must instead tackle these gaps through astute handling of exceptions, applying analytics for context, and offering real-time and mobile interaction. Dynamic case management is emerging as an important solution component to this initiative. And providers are responding: Forrester sees an improved ability to build, use, deploy, and change case processes in the platforms reviewed, but work still remains. Enterprise architects now have access to deployment options with public exchanges for packaged use cases and diverse cloud options, and this market is assuredly keeping pace with enterprise software trends.

Products Improve Design, Rules, And UI Development

DCM solution platforms tackle increasingly complex use cases. Why? More transactions are now moving straight through processing to self-service resolution. This transition is positive, but the exceptions that remain just get harder to anticipate and resolve. Channel diversity and the need to understand context with expanded data relationships compound the dilemma. Abstracting this complexity through information and task design models, English expression editors for rules, integrated user interface (UI) development tooling, and preconfigured templates and frameworks is the essence of a quality DCM product. Our evaluation shows:

- › **Varying levels of information-led design.** Information modeling is the ability to visually associate data (from DCM and non-DCM repositories) with stages in the case life cycle. With this review, platforms can now combine information modeling with traditional process-based design mapping. Why is this balance important? First, it's easier to communicate with the business about information flows than process maps. Second, the less structured the process, the more a case's information determines the next best step. In a true case process, workflow tasks or microflows become guardrails that open and close case stages.¹ Most DCM products can build relationships among business objects or entities. The highest-rated vendors have advanced ways to visualize how information relates to a stage and the ability to use a drag-and-drop entity modeler within a state machine metaphor.
- › **Improving, but still diverse, rules management.** Rules-based processing that drives state transitions now dominates case solutions. Vendors have responded with more capable rules management, but rules complexity is still a challenge. Most vendors address this need in three ways: 1) rules that alter the UI and navigation; 2) workflow/routing rules; and 3) rules that affect information and context. The problem for enterprises? The rules each have their own configuration UI and are scattered across repositories, which prevents centralized maintenance and governance.
- › **Improved, but still disjointed, UI development environments.** A significant amount of effort goes into building the case management user interface. It's common for a firm to devote 50% of its professional services budget to building the case worker's and manager's web and mobile

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interactions with the system.² To help, vendors have UI development tools that design forms and position fields on a page. But these tools were designed before the mobile imperative, so vendors have introduced a third tool or framework set for mobile development. It's no surprise that the diverse tool sets make for sometimes confusing and expensive development. Some customers find it attractive to completely ignore the vendor tools and build in separate environment (e.g., Adobe AER or Angular JS forms).

Enterprises Are Using DCM Platforms For More Than One Use Case

More than half of enterprises Forrester speaks with have at least two DCM deployments on the same platform.³ This number has continued to increase since 2013, which indicates that tech management is purposely developing skills in particular platforms and not allowing proliferations of point case solutions unless there is compelling reason to do so.⁴ In addition, risk reduction, scale, and control have shifted new case solutions to the cloud. From a deployment perspective, we see:

- › **Maturity in preconfigured templates and accelerators.** Ten of 14 vendors are on a path toward productized domain-specific accelerators. Some build case patterns from scratch with business process management (BPM) tools. But most allow reusability of process and object fragments organized as “templates” to capture task steps, forms, rules, and data models that can be reused within an enterprise. The most advanced? Prebuilt templates or frameworks for specific business processes, such as insurance onboarding, generic case patterns for investigative, service requests, and incident management, are all available in a public app store.
- › **Growth of cloud deployments.** Several vendors, such as Appian and Eccentex, have reported strong growth in subscription revenues from either platform-as-a-service (PaaS) or software-as-a-service (SaaS) deployments. PaaS exposes the case development and execution platform and is more common than SaaS solutions, which provide domain-specific or preconfigured case patterns. Advantages of these deployment types include scale for contraction and expansion, lower cost of compute and storage resources, and rapid deployment. Ultimately, accessing openly available data and self-service deployment via web APIs is the main advantage of this developing model.
- › **Inconsistent treatment of DCM and ECM integration.** Providers fall into two camps: those that view enterprise content management (ECM) and unstructured content as front and center and those that treat it as just another data type. Not surprisingly, vendors that have advanced capture, ECM, and customer communication management (CCM) capabilities — namely IBM, Isis Papyrus, Newgen Software, and OnBase by Hyland — are in the former category. The takeaway? In evaluating vendors, determine how important capture, records management, and content analytics are to your use case.

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Dynamic Case Management Evaluation Overview

To assess the state of the DCM market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top DCM vendors.

DCM Evaluation Criteria Emphasize Information Management And Support Breadth

After examining past research and user need assessments and conducting vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 21 criteria, which we grouped into three high-level buckets:

- › **Current offering.** To assess the breadth and depth of each vendor's dynamic case management product set, we evaluated each solution's architecture, supporting capabilities, vertical penetration, and ease of implementation.
- › **Strategy.** We reviewed each vendor's strategy to assess how it plans to evolve its dynamic case management solution to meet emerging customer demands. We also evaluated each vendor's go-to-market approach and direction strategies.
- › **Market presence.** To establish each dynamic case management product's market presence, we evaluated each provider's company financials, adoption, and partnerships.

Vendors Have Broad Process Applicability And Distinct Case Management Features

Forrester included 14 vendors in the assessment: Appian, bpm'online, Column Technologies, DST Systems, Eccentex, IBM, Isis Papyrus, Lexmark Enterprise Software, MicroPact, Newgen Software, OnBase by Hyland, OpenText, Pegasystems, and TIBCO Software. Each of these vendors has (see Figure 1):

- › **Specific case management capabilities.** Vendors' solutions use a BPM platform and include significant proprietary capabilities in key areas of technology for dynamic case management (e.g., enterprise content management, social technologies, and analytics). Each case management solution framework is distinguishable from the underlying BPM platform itself.
- › **Innovation where it matters.** Vendors demonstrate an innovative approach to case management. Top areas of interest for 2016 include information-led design, predictive analytics, and enterprise collaboration.
- › **Broad use case relevance.** Vendors each have a horizontal case management platform defined by its applicability to use cases across the three main case management categories: investigative, incident management, and service requests.

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- › **Cross-industry relevance.** The vendor markets its products across multiple industries rather than being a solution specialist, as defined in the “Choosing Between Specialists Solutions And Dynamic Case Management Platforms” Forrester report.⁵ In some instances, we have included vendors that began as solution specialists and show progress toward multiple industries and use cases (e.g., Column Technologies and MicroPact).
- › **Client interest.** Forrester’s clients often discuss these vendors in inquiry calls. The vendors are commonly on clients’ shortlists, final selection validations, and partnership referrals.

FIGURE 1 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product evaluated	Product version evaluated
Appian	Appian Platform	7.11
bpm'online	bpm'online	v 7.7
Column Technologies	Column Case Management	V.4.02
DST Systems	AWD	10.8
Eccentex	AppBase AppTemplate AppLibrary App Marketplace	5.2*
IBM	IBM Case Manager	v 5.2
Isis Papyrus	Papyrus Platform for Business Communication and Process	
Lexmark Enterprise Software	Kofax TotalAgility	7.2
MicroPact	entellitrak	3.18
Newgen Software	OmniFlow Business Process Management Suite	10.3
OnBase by Hyland	OnBase 15	
OpenText	OpenText Process Suite	
Pegasystems	Pega 7	
TIBCO Software	ActiveMatrix BPM	4.0

*Version only for AppBase

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FIGURE 1 Evaluated Vendors: Product Information And Selection Criteria (Cont.)**Vendor selection criteria**

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Analytics And Information-Led Design Distinguish Vendors

The evaluation uncovered a market in which analytics, information-led design, and preconfigured accelerators separate providers (see Figure 2):

- › **Pegasystems, Appian, and IBM lead the pack.** Leaders showed the greatest progress toward dynamic case management's ultimate mission: to drive worker productivity and customer experience by applying predictive analytics. While analytics technology has been evolving for some time, this year, Leaders have solid production use cases. Cloud deployments, mobile-first design approaches, information-led design, and packaged case solutions further separate our Leaders from the rest of the pack.
- › **Strong Performers offer competitive options.** Our Strong Performers, Lexmark Enterprise Software, TIBCO Software, OnBase by Hyland, Isis Papyrus, Newgen Software, OpenText, Eccentex, and DST Systems, offer a host of competitive DCM offerings appropriate for different process profiles, including content-centric, midmarket, or industry-specific. Some vendors missed a Leader position due to regional distribution, poor customer experience, or a low number of packaged offerings. Others had gaps in user interface and mobile development or runtime features or received mixed customer reviews on ease of implementation.

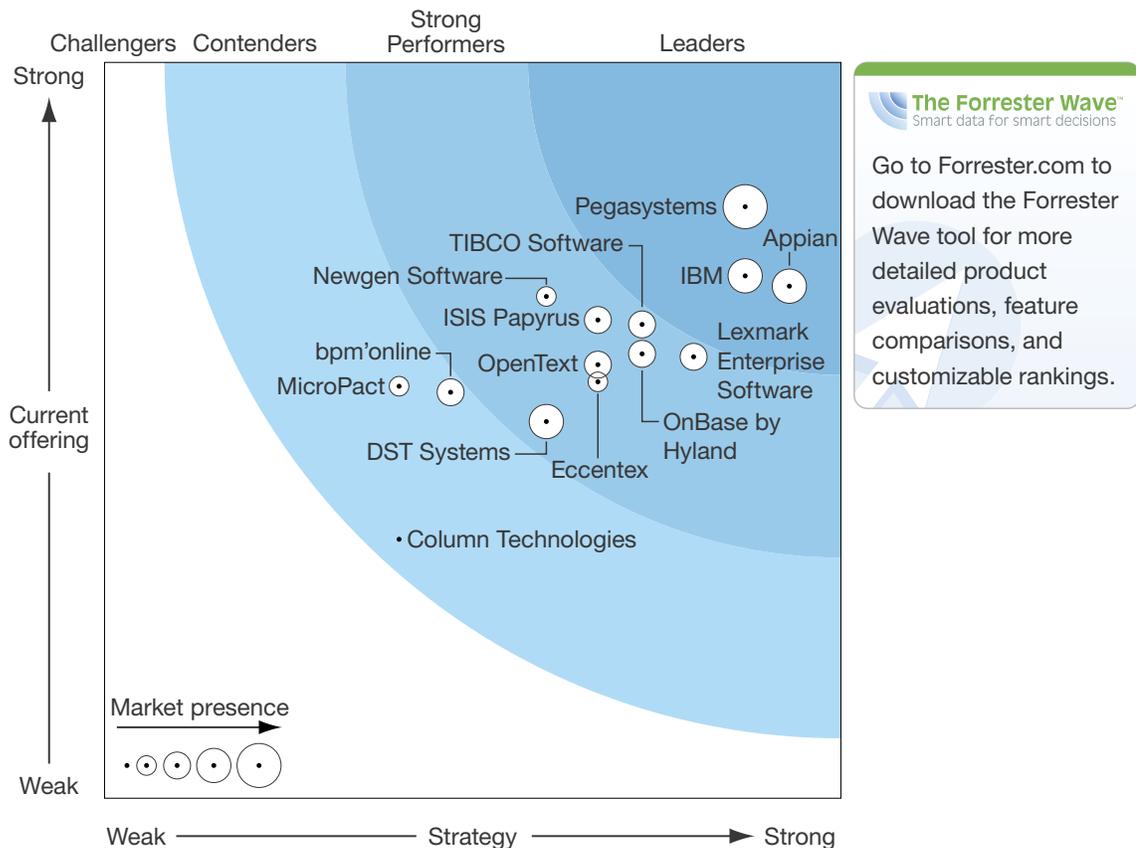
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- › **Contenders lack breadth of use cases and information-led approaches.** Most Contenders emerged from the workflow and business process management space, which means they have features essential for more-structured processes and have built their case solutions from these well-vetted tools. Some are in the process of evolving independent case frameworks that have the adaptability required for case life-cycle management.

We intend this evaluation of the dynamic case management market to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

FIGURE 2 Forrester Wave™: Dynamic Case Management, Q1 '16



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FIGURE 2 Forrester Wave™: Dynamic Case Management, Q1 '16 (Cont.)

	Forrester's Weighting	Appian	bpm'online	Column Technologies	DST Systems	Eccentex	IBM	Isis Papyrus	Lexmark Enterprise Software	MicroPact	Newgen Software	OnBase by Hyland	OpenText	Pegasystems	TIBCO Software
CURRENT OFFERING	50%	3.48	2.76	1.76	2.56	2.83	3.55	3.25	3.00	2.80	3.41	3.02	2.94	4.02	3.22
Architectural support for DCM	30%	3.05	3.10	2.05	2.90	3.15	3.65	3.80	3.20	3.40	3.90	3.00	3.35	4.25	2.90
Supporting capabilities	30%	3.24	2.00	1.62	2.72	2.60	3.84	3.47	2.66	1.82	3.45	2.56	2.66	4.11	3.03
Horizontal, cross-industry domain support	10%	4.67	4.00	1.33	2.00	2.00	4.00	1.67	2.67	3.33	3.00	3.00	2.33	4.67	1.67
Implementation and case modeling	30%	3.75	2.75	1.75	2.25	3.00	3.00	3.00	3.25	3.00	3.00	3.50	3.00	3.50	4.25
STRATEGY	50%	4.65	2.35	2.00	3.00	3.35	4.35	3.35	4.00	2.00	3.00	3.65	3.35	4.35	3.65
Market approach	65%	5.00	2.00	2.00	3.00	3.00	4.00	3.00	4.00	2.00	3.00	4.00	3.00	4.00	4.00
Planned enhancements	35%	4.00	3.00	2.00	3.00	4.00	5.00	4.00	4.00	2.00	3.00	3.00	4.00	5.00	3.00
MARKET PRESENCE	0%	4.00	2.33	1.00	3.67	1.33	4.00	2.33	2.67	2.00	2.00	3.00	2.67	5.00	2.67
This version's installed base	33%	4.00	2.00	1.00	3.00	1.00	4.00	2.00	3.00	1.00	1.00	3.00	2.00	5.00	1.00
This product's installed base	33%	4.00	3.00	1.00	4.00	2.00	4.00	2.00	3.00	3.00	3.00	3.00	3.00	5.00	4.00
Revenue	33%	4.00	2.00	1.00	4.00	1.00	4.00	3.00	0.00	2.00	2.00	3.00	3.00	5.00	3.00

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

Vendor Profiles

Leaders Excel At Analytics And Solution Accelerators

Leaders stand out due to sophistication in the technologies that will extend DCM to its ultimate potential: to understand workers' and customers' contexts and provide real-time guidance and future case planning. Analytics, information-led design, declarative rules, and advanced UI support are the essential ingredients to future case excellence. The evaluation found that:

- › **Pegasystems leads with predictive analytics and applications.** Compared with other vendors in the evaluation, Pegasystems has the most production predictive analytics use cases. This is no real surprise, as it is one of only two DCM providers in Forrester's evaluation of the real-time interaction

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management market.⁶ In several deployments, Pega 7 feeds maintenance history into the predictive analytics application and suggests a repair plan. A deployment for tractor maintenance does the same but with real-time data. And using analytics to guide case decisions is not limited to the physical world. One Japanese property and casualty insurance company uses Pega 7 for the next best action, based on capture of channel interaction and events streams. Solution frameworks, such as a preconfigured data model for order provisioning in telecommunications, and field service applications, such as for parts management, are strengths.⁷

Advanced blue-chip customers use Pegasystems, so integration is a must. Pega 7 delivers with a rich software development kit (SDK) library of connectors to create custom services backed by utilities to expose work processes as representational state transfer (REST) endpoints. Pega 7 is a powerful platform, but it's not simple. There are modeling and configuration environments for events (streaming data); decisions (business rules); and process (task modeler). Multiple analytics repositories are also in play: a transactional database for business activity modeling (BAM) and business intelligence (BI) and one for predictive analytics; a NoSQL Hadoop environment; and a recent addition, a federated case management repository that allows other case processes to be opened within their case applications. To address the growing set of case applications, Pega 7 Express provides a simpler configuration tool that can toggle to a deeper design mode. Enterprises select Pega 7 for process agility, domain accelerators, and rule-centric apps and when integration strength is a core requirement, particularly for service request use cases.

- › **Appian's growth will come from cloud deployments.** Appian's revenue is now over 90% recurring, due to significant growth in cloud adoption and on-premises licenses. Cloud is now the preferred deployment option for most new customers globally. Why the growth? Amazon Web Services' auto scaling, load balancing, and APIs for partners and customers to configure DCM instances are all strong drivers. Appian has a mobile-first design approach, a new design interface for better component reusability, and improved runtime when compared with results in our 2013 Forrester Wave evaluation.⁸

The vendor has expanded its case management packaging. Appian now boasts 32 prebuilt apps in its App Market, which is available to both customers and integration partners. Preconfigured rules, case parameters, milestones, tasks, and dashboard reporting help drive partner distribution. Enterprises we surveyed selected Appian for the ability to deploy mobile and web apps, strong designer and deployment tools, and Appian Records, a capability to monitor cases and keep track of external data sources.⁹ Appian has more than 600 employees and global adoption, so look for consistent growth to lead this vendor to the public markets.

- › **IBM views content and case as evolving together.** IBM is focused on analytics — and DCM is caught up in this corporate direction. Accelerators that tackle a domain such as fraud are potential winners for IBM customers. IBM Watson is embedded in Case Manager, along with other analytics such as SPSS for predictive use cases. Although IBM licenses some of these additions separately (at added cost) from the DCM platform, they hold strong promise. One focus is analytics to open

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a case with human intervention. For example, the US Department of Transportation's National Highway Traffic Safety Administration used Case Manager to process an investigation of potential automobile safety concerns indicated by the analytics platform.

IBM continues to emphasize the importance of information when decisions based on content and context are the focus. For example, IBM introduced a new case compliance workflow that encapsulates content artifacts. Overall, the IBM product is strong on design time capability, with the deepest content solution on the market. The version we reviewed has strong embedded rules; template capability to create reusable case artifacts such as rules, user-interface, and process maps; and improved mobile delivery. A true SaaS and PaaS public cloud offering available through, and integrated with, IBM Bluemix is still in the future. Yet Case Manager as a hosted service is available today, with more enhancements planned in 2016. IBM is often a strong fit where the enterprise direction is to use IBM analytics or as an upgrade to existing ECM and BPM solutions.

Strong Performers Attack The Market From Different Perspectives

Strong performers are generally well balanced, and differences stem from company origins, including whether a given company began as an ECM, BPM, or solution specialist. Current growth plans and focus in the market serve to balance providers further. We see that:

- › **Lexmark Enterprise Software surrounds DCM with a broad software portfolio.** Lexmark Enterprise Software is focused on a single vision: to build smart capture, process, and content solutions that address unstructured information and process problems. Kofax TotalAgility, part of a \$700 million software unit with more than 30,000 customers, has prebuilt integrations to Lexmark International's analytics, e-signature, and robotic process automation (RPA) capabilities and also integrates with the company's CCM, enterprise file sync and share (EFSS), and ECM products. Unification (e.g., a common user experience across components, with increasingly integrated and bundled components) is the goal, and Lexmark has improved runtime capabilities. The tool is still weighted toward process mapping rather than information-led configuration. The core components are easy to implement and configure, and as more components move from a desktop client to a thin client, user implementation will improve further. Today, enterprises select Lexmark Enterprise Software for its breadth of applications; its domain expertise in healthcare, mortgage, and higher education; and when capture and content are important.
- › **TIBCO Software focuses on cases that drive from the Fast Data platform.** TIBCO Software's case platform continues to be a strong anchor in the vendor's middleware stack, along with integration with other components, such as its enterprise service bus and event-streaming platforms. ActiveMatrix BPM 4.0 is a major release. A bundled case framework, global case data, microflows, REST services enhancements to reduce code development, and a new composable UI platform top the list of new capabilities. The enhanced approach puts business guardrails around less predictable work based on state transitions. This move from tasks performed to states acted upon in the case life cycle signals a strategic move from the big-process approach that TIBCO Software pioneered.

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Although it is overall a complex platform, enterprises select ActiveMatrix for event-driven processes that can handle large transaction volume, a necessity in the service request use case area. While TIBCO has less overall case experience than some of its competitors, the enhanced platform, with a strong data-centric approach to DCM, will serve expansion in the market well.

- › **OnBase by Hyland takes an artifact-driven approach.** OnBase by Hyland is information-centric and event-driven and, like other ECM providers, treats content as a first-class citizen. Case development is straightforward and uses a shared environment for information and process modeling. The platform creates case applications with the OnBase WorkView Case Manager framework. It uses entity relationship mapping to model associations between subjects in the business domain, (e.g., classes) and data attributes that describe them. From there, it generates an object-relational database for the case application based on the data model. The OnBase workflow engine manages the case life cycle as well as the event/condition/action-style rules specifying how artifacts evolve as they progress through stages. A planned new responsive design capability will augment the current OnBase e-forms and page designers, which currently are not developed on a mobile-first framework. Enterprises select OnBase by Hyland for implementation ease and domain knowledge in industries such as higher education and health insurance. Services accelerators for these sectors feature configuration files that include data models, flows, and folder structures.
- › **Isis Papyrus imports information models to help jump-start process design.** Goal orientation, supported by the state and event model, is advanced relative to other providers, with the ability for tasks, rules, and context to adapt to altered goals. Isis Papyrus can import external information models, such as ACORD XML schema, to jump-start a process design. As a single, organically developed stack, there is a central point of management that draws on process data from one object repository. Tight integration with CCM, capture, and ECM tools is a strength. The product remains a particularly strong fit for specialized and complex process support, such as multicountry currency rule sets, where detail and creative solutions are in play. Limited UI design support and fewer use cases compared with other vendors remain limitations. BNP Paribas, in finance, and WellCare, in healthcare, are recent wins for highly adaptive work processes.
- › **Newgen Software shows depth in solution accelerators and intelligent apps.** Newgen Software reports 25% growth, with key wins this year across various verticals. Newgen is aggressively expanding its intelligent apps, with more than 150 across 40 verticals, including a Foreign Account Tax Compliance Act (FATCA) solution for financial services. These apps are separately licensed and released under product management control and include process templates, form fragments, and rules. Compared with other vendors, Newgen has an extremely broad portfolio that includes a complex event-processing model, ECM, capture, output management, and an optional mobile development framework. Of great interest is a platform set to release during the second quarter of 2016. It will be a low-code cloud, PaaS platform, hosted on Amazon Web Services, that targets lighter and more collaborative-based use cases (in other words, don't try to use it for loan origination) and is aligned with Forrester's coverage of collaborative work management.¹⁰ Overall,

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Newgen has a strong and balanced solution that will benefit from a more information-led data modeling capability. Enterprises often choose Newgen Software for its product features, quality of consultants, ease of implementation, and lower total cost of ownership.

- › **OpenText Process Suite introduces strong information-led design.** As cases move through life cycles from one state to another, enterprises need to model and visualize how required information (entities, data, and objects) map to these state transitions. OpenText's recent 10.8 release takes a leap forward with an entity modeling framework that provides visualization and configuration support. OpenText Cordys, delivering automation capabilities, remains a solid backbone of the OpenText Process Suite, with cloud, hybrid, and on-premises all viable deployments. Perhaps the greatest value is in the components that surround the process server: OpenText Analytics (formerly Actuate), an upgrade that will replace Birst for BI; OpenText Archive Server, a powerful transactional content store; and OpenText Customer Communications Management.¹¹ OpenText is catching up with the field after wrestling with complex road map issues resulting from numerous BPM and DCM acquisitions. OpenText Suite 16, targeted for early 2016, is a major release and will ease development for features such as runtime, entity modeling, mobile, and packaged layouts and will overall reduce coding, particularly for UI development.¹² Customers most often select OpenText when the enterprise direction is to use other OpenText products, such as Content Server, or as an upgrade to existing BPM solutions.
- › **Eccentex provides a flexible, developer-oriented BPM with strong DCM PaaS.** Sixty percent of Eccentex revenue is from its hosted DCM solutions running in Microsoft Azure, Rackspace, or on-premises. The DCM product provides tools to build complex cases related to business processes that may require unstructured processes, ad hoc work, and document management. For more-advanced configurations, developers can go down to the BPM PaaS level to build customized BPM-centric applications or customize the DCM solution with custom rules (C#, SQL, or JavaScript) and configure services for integration, full-text search, optical character recognition (OCR), data modeling, and internationalization. Its PaaS and SaaS pricing is attractive, with options starting at \$100 per user per month and enterprise deals costing around \$200,000 per year, particularly as the product includes ECM and capture support that may eliminate external components. Today, Eccentex offers 25 vertical and horizontal solutions in its marketplace but needs to evolve from PaaS delivery to a true SaaS solution with a more packaged feel. Overall, enterprises select AppBase when they require a strong and flexible BPM or DCM solution with robust developer support. Enterprise-class customers include the Houston Police Department, the New York State Department of Financial Services, Samsung, Sempra Energy, and VicRoads. Look for Eccentex, a private company with 90 employees, to possibly make an acquisition in the near future.
- › **DST Systems helps enterprises master complexity for health and wealth applications.** DST Systems has always led with industry expertise, starting in mutual fund services and expanding to healthcare, insurance, and brokerage. It's well positioned today because enterprises view DCM as an enabler for targeted solutions that combine case management, content and communications, and analytics. DST Systems' AWD platform has become a smart process application (SPA)

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accelerator and is ideal for appeals and grievances for health payers, onboarding for wealth management, and compliance reporting, to name a few. Hot areas today include DCM solutions that reduce cost for regulation and risk management and improve operational worker support through digitization. DST Systems' new release has a solid widget and snippet strategy, a revamped smart forms design environment, and an expanded communication capability. The focus for analytics is expanding as well, with extensions moving beyond worker productivity to process and quality analytics and toward predicative use cases. DST Systems remains unique in the DCM landscape in terms of company scale, depth, and focus on security and compliance. Financial services firms, in particular, should have AWD on their radars to solve emerging process challenges.

Contenders Have Strengths But Lack Balance And Experience

Contenders have a strong fit in specific domains but lack overall balance across the wide set of product features or have not ramped to meet the experience levels of others in the field. We see that:

- › **Bpm'online focuses on process-based customer engagement.** Bpm'online uses agile techniques with roots in classic BPM, starts with the customer journey, and targets consistent experience. The vendor begins with a BPM perspective and then adds a full CRM and marketing services layer. Overall, this is a BPM solution that enterprises can use to build customer-focused case processes through integrations with popular social sites, tools, native chat and feed functions, and Skype, and it stems from the vendor's roots in unified communication. The product also offers CCM, ECM, and traditional dashboard analytics through integrations. Bpm'online is best for use cases that don't require deep analytics and a declarative rules engine, like customer service, but that need interoperability with CRM environments. Clients should consider it for these lighter use cases over providers like Pegasystems. Currently, bpm'online mostly sells its platform in Europe, directly and through 400 partners. It has 550 employees and has garnered 6,000 clients, with significant penetration of the midmarket.
- › **MicroPact accelerates public domain expertise with its Iron Data merger.** MicroPact has merged with Iron Data Solutions and now counts more than 300 government and commercial organizations as customers. The public sector, with its large installed base of healthcare, benefits, regulatory licensing, and investigative management systems, brings in the majority of revenue. Solutions like the Naval Justice Information System, where MicroPact's entellitrak manages cases for litigation, corrections, command actions, law enforcement, and investigations, are typical. Market expansion outside of government is accelerating, and preconfigured solutions for worker compensation, labor relations, and appeals management will help. Entellitrak shows strong runtime features, frameworks for generic case patterns, and preconfigured artifacts for domains such as workers compensation, with room for enterprises and partners that prefer the Java environment to innovate. There are plenty of expansion opportunities for the platform in converting the Iron Data Solutions installed base to entellitrak.

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- › **Column Technologies began as an IT service management provider.** Column Technologies' case solution extends from the BMC Remedy core suite of applications, providing easier configuration and plenty of functionality such as good sorting and filtering for case worker personalization. It enhances analytics with open source and OEM products such as TIBCO Software's JasperSoft. But Column's strength is domain expertise. Investigative case management covers several large police applications (for example, the vendor developed a proprietary Automated Solvability Index Matrix) and extensive applications for Medicare fraud. Column is a particularly good fit for integration with BMC Software's Remedy 9, an IT Service Management Suite platform, making it a relatively low-cost DCM solution.

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Supplemental Material

Online Resource

The online version of Figure 2 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

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Data Sources Used In This Forrester Wave

Forrester used a combination of four data sources to assess the strengths and weaknesses of each solution. We evaluated the vendors participating in this Forrester Wave, in part, using materials that they provided to us by November 25, 2015.

- › **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria.
- › **Executive briefings.** Once we analyzed the completed vendor surveys, we conducted vendor calls where each participant discussed the company's background, positioning, value proposition, customer base, and strategic vision.
- › **Product demos.** We asked vendors to conduct demonstrations of their products' functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- › **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted an online reference survey with five of each vendor's current customers.

The Forrester Wave Methodology

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

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

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

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with our Integrity Policy. For more information, go to <http://www.forrester.com/marketing/policies/integrity-policy.html>.

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Endnotes

- ¹ Forrester is using the guard/stage/milestone semantics from the emerging Case Management Modeling Notation (CMMN) initiative. Source: “Case Management Model And Notation (CMMN),” Object Management Group (<http://www.omg.org/spec/CMMN/>).
- ² We have based this estimate on more than 100 client inquiry calls about plans for and implementation of dynamic case management solutions.
- ³ We have based this estimate on more than 100 client inquiry calls about plans for and implementation of dynamic case management solutions.
- ⁴ We have identified this trend through more than 100 client inquiry calls about plans for and implementation of dynamic case management solutions, as well as dozens of advisory sessions with services vendors. Compelling reasons result from extensive domain expertise and preconfiguration for a use case area; for example, legal case management.
- ⁵ DCM platforms will excel in five use case areas, and domain-specific solutions will grab the largest share of these use case areas, with specific buyer criteria determining best fit for the rest. See the “[Choosing Between Specialist Solutions And Dynamic Case Management Platforms](#)” Forrester report.
- ⁶ While Forrester also included IBM in our interaction management evaluation, its product is not as firmly integrated into the overall DCM platform as that of Pegasystems. Pegasystems merges analytics with business rules management and has expanded its next-best-action capabilities from the contact center to address sales, service, and marketing channels. See the “[The Forrester Wave™: Real-Time Interaction Management, Q3 2015](#)” Forrester report.
- ⁷ The vendor’s field service expertise stems from its acquisition of Antenna, a leading mobile application development vendor. Source: “Pegasystems Acquires Mobile Application Development Leader Antenna Software,” Pegasystems press release, October 11, 2013 (<http://www.pega.com/about/news/press-releases/pegasystems-acquires-mobile-application-development-leader-antenna>).
- ⁸ We last conducted an evaluation of the dynamic case management market in 2014. To understand the progress that some vendors have made, see the “[The Forrester Wave™: Dynamic Case Management, Q1 2014](#)” Forrester report.
- ⁹ Appian is experiencing strong growth for investigative case management within the pharmaceutical industry. For example, Sanofi uses the platform for global pharmacovigilance, the monitoring of events that affect compliance or label changes. The vendor also offers strong use cases in government and healthcare, as represented by its role in application processing for the US Affordable Care Act.
- ¹⁰ When the customer is the central focus of a company’s strategy, its employees must work together more efficiently. For a description of the emerging collaborative work management market, see the “[Vendor Landscape: Collaborative Work Management For The Enterprise](#)” Forrester report.
- ¹¹ OpenText’s document output for customer communication management made it a Leader in Forrester’s 2014 evaluation of the market. To see how other vendors fared against our 26 criteria, see the “[The Forrester Wave™: Document Output For Customer Communications Management, Q1 2014](#)” Forrester report.
- ¹² This release will provide a single development environment for the desktop and mobile. Source: November 2015 briefing by OpenText executives with Forrester.

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