

Process Automation Platforms Buyers Guide

Software Provider and Product Assessment



EXECUTIVE
SUMMARY

***ISG** Research™



Process Automation Platforms

Enterprises face a perfect storm of challenges and opportunities. The pace of digital transformation, coupled with increasing customer expectations for personalized experiences, has applied pressure on enterprises to innovate and optimize. Simultaneously, the rapid expansion of data from diverse sources presents an opportunity for insight-driven decision-making and a challenge in processing and analysis. Enterprises that are grappling with legacy systems struggle to keep up with today's demands while navigating complex regulatory environments that require detailed compliance and reporting. The global talent shortage, particularly in technology and IT-related fields, makes it difficult for enterprises to scale operations effectively. Moreover, the need for business agility and resilience, along with these converging factors, has created an urgency to automate routine tasks, but also enhance decision-making capabilities, improve customer interactions and accelerate continuous process improvement. In this context, intelligent automation has emerged as a transformative force.

ISG Research defines intelligent automation as an advanced approach to business process optimization that utilizes artificial intelligence (AI), machine learning (ML) and automation technologies. Intelligent automation enhances efficiency, reduces errors and improves decision-making across the enterprise. It shifts human resources from simple, repetitive tasks to more complex problem-solving activities while augmenting their capabilities through human-AI collaboration that embraces continuous learning systems and improves over time. ISG Research segments intelligent automation into four areas: Process Automation Platforms, Conversational Automation, Intelligent Document Processing and Process Discovery and Mining.

Process automation platforms, which form the foundation of intelligent automation, automate repetitive, rule-based tasks across various applications and systems. Originally designed using robotic process automation (RPA), they emulate human actions to perform high-volume, transactional activities efficiently and without error. ISG Research anticipates that RPA and generative AI (GenAI) will remain integral to task and process automation and that the software segment will soon focus on process orchestration and management. By integrating with existing systems and software tools and accessing large repositories of structured, semi-structured and unstructured data, intelligent automation with process automation platforms can lead to business process insights that contribute to innovation and competitive advantage. We assert that by 2026, RPA technology will evolve to address the broader needs of intelligent automation and distributed cloud architectures, and

Intelligent Automation

Market Assertion

By 2026, RPA technology will evolve to address the broader needs of intelligent automation and distributed cloud architectures, and will be delivered as a SaaS platform, reducing the need for complex infrastructure setup and maintenance.

Jeff Orr
Director of Research, Digital Technology



ISG Research™



will be delivered as a SaaS platform, reducing the need for complex infrastructure setup and maintenance.

For chief information officers and IT leaders, task and process automation represents a strategic investment in digital transformation, offering the potential to enhance operational efficiency, improved accuracy and consistency, and drive greater innovation and agility.

Process automation platform software has become a focal point in enterprise technology discussions, driven by the convergence of several critical factors. The acceleration of digital transformation, catalyzed by the COVID-19 pandemic, has increased the need for operational agility and modernization of legacy systems. This urgency, combined with advancements in AI and machine learning, has expanded process automation capabilities to handle complex cognitive tasks.

The explosion of data across enterprises has further amplified the importance of this technology, as it offers powerful tools for processing and deriving insights from vast amounts of information, enabling data-driven decision-making at scale. Additionally, process automation platforms address the evolving workforce landscape by automating routine tasks and augmenting human capabilities, allowing workers to focus on higher-value, strategic activities.

Process automation platforms, which support an enterprise's goal to increase operational efficiency, reduce errors in repetitive tasks and free up human resources for more strategic work. These platforms are particularly beneficial for organizations looking to streamline high-volume, rule-based processes across multiple departments or legacy systems. They offer quick wins in cost reduction and productivity gains, suitable for businesses seeking rapid return on investment from automation initiatives.



A well-chosen automation strategy can drive operational excellence, improved customer experiences and enhanced decision-making.

The choice of intelligent automation software should align with the enterprise's strategic objectives and operational needs. It is also important to consider factors such as the current process landscape, compatibility and integration with the technology infrastructure, data availability and quality, ROI and financial impact and organizational readiness. A well-chosen automation strategy can drive operational excellence, improved customer experiences and enhanced decision-making.

GenAI and large language model technologies offer valuable capabilities in natural language understanding and processing, content generation and task automation, potentially streamlining operations and enhancing decision-making processes. It is crucial to understand the potential and challenges



of these technologies. We assert that through 2026, only 1 in 5 enterprises will analyze patterns and generate insights from GenAI software that empower data-driven decision-making and lead to improved business outcomes.

GenAI and LLMs are enhancing process automation platform software in several ways, including:

- Automated code generation, with large language models generating code snippets or entire scripts based on natural language descriptions of desired automation tasks. This speeds the development of automation workflows and reduces the technical expertise required to create automations.
- Natural language process design, which allows users to describe complex processes in plain language and generates a visual flowchart or process map, making it easier for non-technical staff to contribute to automation projects.
- Intelligent decision-making, using large language models to analyze vast amounts of historical data and current content to make more granular decisions within automation workflows, handling exceptions and edge cases more effectively.
- Dynamic process optimization, using GenAI to suggest process improvements by analyzing execution data and identifying inefficiencies or bottlenecks on a continuous basis.

Digital Technology
Market Assertion

Through 2026, only 1 in 5 enterprises will analyze patterns and generate insights from GenAI software that empower data-driven decision-making and lead to improved business outcomes.

Jeff Orr
Director of Research, Digital Technology

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CIOs and IT leaders should approach intelligent automation software incorporating GenAI and LLMs with enthusiasm and caution. While these technologies offer significant benefits, they also come with unique challenges and prerequisites. A holistic evaluation must include technical aspects and also business, ethical and strategic considerations. Other areas of focus include risk awareness, critical infrastructure, organizational readiness, governance and compliance and a long-term perspective on sustainability and scalability of AI approaches.

Our Process Automation Platforms Buyers Guide is designed to provide a 360-degree view of a software provider's ability to use enterprise data to standardize and optimize a variety of business processes and tasks. ISG believes a methodical approach is essential to maximize competitiveness. It is critical to select the right software provider and product to improve the performance of your enterprise's people, process, information and technology components.



The ISG Buyers Guide™ for Process Automation Platforms evaluates product capabilities including attended and unattended RPA, system integrations, natural language processing (NLP), data analytics, workflow builders, user interface, AI/ML, cognitive automation, load balancing, citizen developers, error handling and exceptions, and demonstrated investment in product capabilities. To be included in this Buyers Guide, software providers must meet or exceed the inclusion criteria and have commercially available products in task and process automation.

This Buyers Guide report evaluates the following software providers that offer products addressing key elements of process automation platforms: Appian, Automation Anywhere, Datamatics, Fortra, IBM, Microsoft, MuleSoft, Newgen, Nintex, Nividous, Pegasystems, ProcessMaker, SAP, ServiceNow, SS&C Blue Prism, Tungsten Automation, UiPath and Worksoft. Software providers that offer intelligent document processing, conversational automation or process discovery capabilities are represented in separate Buyers Guide research reports.



Buyers Guide Overview

For over two decades, ISG Research has conducted market research in a spectrum of areas across business applications, tools and technologies. We have designed the Buyers Guide to provide a balanced perspective of software providers and products that is rooted in an understanding of the business requirements in any enterprise. Utilization of our research methodology and decades of experience enables our Buyers Guide to be an effective method



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to assess and select software providers and products. The findings of this research undertaking contribute to our comprehensive approach to rating software providers in a manner that is based on the assessments completed by an enterprise.

The ISG Buyers Guide™ for Process Automation Platforms is the distillation of over a year of market and product research efforts. It is an assessment of how well software providers' offerings address enterprises' requirements for process automation platform software. The index is structured to support a request for information (RFI) that could be used in the request for proposal (RFP) process by incorporating all criteria needed to evaluate, select, utilize and maintain relationships with software providers. An effective product and customer experience with a provider can ensure the best long-term relationship and value achieved from a resource and financial investment.

In this Buyers Guide, ISG Research evaluates the software in seven key categories that are weighted to reflect buyers' needs based on our expertise and research. Five are product-experience related: Adaptability, Capability, Manageability, Reliability, and Usability. In addition, we consider two customer-experience categories: Validation, and Total Cost of Ownership/Return on Investment (TCO/ROI). To assess functionality, one of the components of Capability, we applied the ISG Research Value Index methodology and blueprint, which links the personas and processes for process automation platforms to an enterprise's requirements.

The structure of the research reflects our understanding that the effective evaluation of software providers and products involves far more than just examining product features, potential revenue or customers generated from a provider's marketing and sales efforts. We believe it is important to take a comprehensive, research-based approach, since making the wrong choice of process automation platform technology can raise the total cost of ownership, lower the return on investment and hamper an enterprise's ability to reach its full performance potential. In addition, this approach can reduce the project's development and



deployment time and eliminate the risk of relying on a short list of software providers that does not represent a best fit for your enterprise.

ISG Research believes that an objective review of software providers and products is a critical business strategy for the adoption and implementation of process automation platform software and applications. An enterprise's review should include a thorough analysis of both what is possible and what is relevant. We urge enterprises to do a thorough job of evaluating intelligent automation systems and tools and offer this Buyers Guide as both the results of our in-depth analysis of these providers and as an evaluation methodology.



How To Use This Buyers Guide

Evaluating Software Providers: The Process

We recommend using the Buyers Guide to assess and evaluate new or existing software providers for your enterprise. The market research can be used as an evaluation framework to establish a formal request for information from providers on products and customer experience and will shorten the cycle time when creating an RFI. The steps listed below provide a process that can facilitate best possible outcomes.

1. Define the business case and goals.
Define the mission and business case for investment and the expected outcomes from your organizational and technological efforts.
2. Specify the business needs.
Defining the business requirements helps identify what specific capabilities are required with respect to people, processes, information and technology.
3. Assess the required roles and responsibilities.
Identify the individuals required for success at every level of the enterprise from executives to frontline workers and determine the needs of each.
4. Outline the project's critical path.
What needs to be done, in what order and who will do it? This outline should make clear the prior dependencies at each step of the project plan.
5. Ascertain the technology approach.
Determine the business and technology approach that most closely aligns to your enterprise's requirements.
6. Establish software provider evaluation criteria.
Utilize the product experience: Adaptability, Capability, Manageability, Reliability and Usability, and the customer experience in TCO/ROI and Validation.
7. Evaluate and select the technology properly.
Weight the categories in the technology evaluation criteria to reflect your enterprise's priorities to determine the short list of software providers and products.
8. Establish the business initiative team to start the project.
Identify who will lead the project and the members of the team needed to plan and execute it with timelines, priorities and resources.



The Findings

All of the products we evaluated are feature-rich, but not all the capabilities offered by a software provider are equally valuable to types of workers or support everything needed to manage products on a continuous basis. Moreover, the existence of too many capabilities may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a larger number of features in the product is a plus, especially if some of them match your enterprise’s established practices or support an initiative that is driving the purchase of new software.

Factors beyond features and functions or software provider assessments may become a deciding factor. For example, an enterprise may face budget constraints such that the TCO evaluation can tip the balance to one provider or another. This is where the Value Index methodology and the appropriate category weighting can be applied to determine the best fit of software providers and products to your specific needs.

Overall Scoring of Software Providers Across Categories

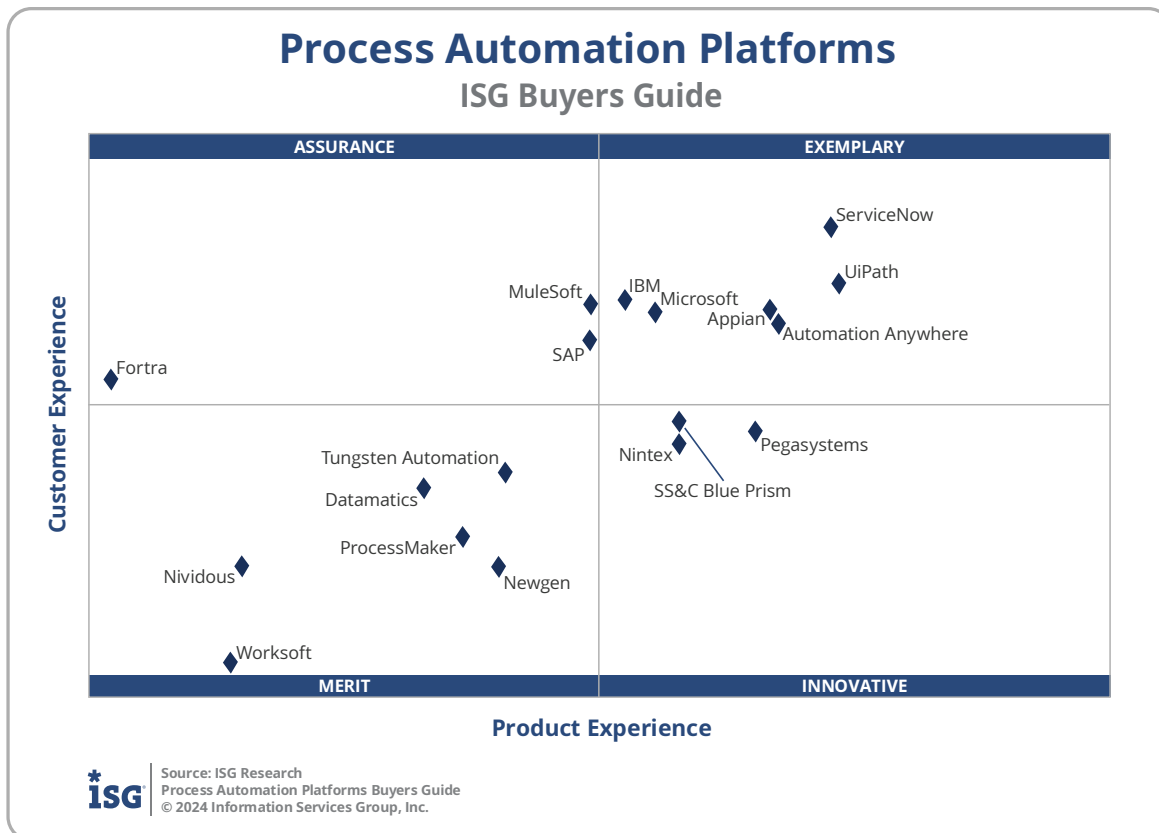
The research finds ServiceNow atop the list, followed by UiPath and Appian. Companies that place in the top three of a category earn the designation of Leader. UiPath has done so in seven categories; ServiceNow in five; Appian and Automation Anywhere in three; and MuleSoft, SAP and SS&C Blue Prism in one category.

The overall representation of the research below places the rating of the Product Experience and Customer Experience on the x and y axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have a higher weighted performance to the axis in aggregate of the five product categories place farther to the right, while the performance and weighting for the two Customer Experience categories determines placement on the vertical axis. In short, software providers that place closer to the upper-right on this chart performed better than those closer to the lower-left.

The research places software providers into one of four overall categories: Assurance, Exemplary, Merit or Innovative. This representation classifies providers’ overall weighted performance.

Process Automation Platforms Overall			
Providers	Grade	Performance	
ServiceNow	A-	Leader	81.9%
UiPath	B++	Leader	80.9%
Appian	B++	Leader	78.4%
Automation Anywhere	B++		77.8%
Pegasystems	B++		75.2%
Microsoft	B+		74.6%
IBM	B+		73.9%
SS&C Blue Prism	B+		73.2%
MuleSoft	B+		73.1%
Nintex	B+		72.7%
SAP	B+		72.0%
Tungsten Automation	B		66.7%
Newgen	B		63.8%
Datamatics	B		63.8%
ProcessMaker	B		63.1%
Fortra	C++		55.5%
Nividous	C++		55.4%
Worksoft	C++		53.6%

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Exemplary: The categorization and placement of software providers in Exemplary (upper right) represent those that performed the best in meeting the overall Product and Customer Experience requirements. The providers rated Exemplary are: Appian, Automation Anywhere, IBM, Microsoft, ServiceNow and UiPath.

Innovative: The categorization and placement of software providers in Innovative (lower right) represent those that performed the best in meeting the overall Product Experience requirements but did not achieve the highest levels of requirements in Customer Experience. The providers rated Innovative are: Nintex, Pegasystems and SS&C Blue Prism.

Assurance: The categorization and placement of software providers in Assurance (upper left) represent those that achieved the highest levels in the overall Customer Experience requirements but did not achieve the highest levels of Product Experience. The providers rated Assurance are: Fortra, MuleSoft and SAP.

Merit: The categorization of software providers in Merit (lower left) represents those that did not exceed the median of performance in Customer or Product Experience or surpass the threshold for the other three categories. The providers rated Merit are: Datamatics, Newgen, Nividous, ProcessMaker, Tungsten Automation and Worksoft.



We warn that close provider placement proximity should not be taken to imply that the packages evaluated are functionally identical or equally well suited for use by every enterprise or for a specific process. Although there is a high degree of commonality in how enterprises handle process automation platforms, there are many idiosyncrasies and differences in how they do these functions that can make one software provider's offering a better fit than another's for a particular enterprise's needs.

We advise enterprises to assess and evaluate software providers based on organizational requirements and use this research as a supplement to internal evaluation of a provider and products.



Product Experience

The process of researching products to address an enterprise’s needs should be comprehensive. Our Value Index methodology examines Product Experience and how it aligns with an enterprise’s life cycle of onboarding, configuration, operations, usage and maintenance. Too often, software providers are not evaluated for the entirety of the product; instead, they are evaluated on market execution and vision of the future, which are flawed since they do not represent an enterprise’s requirements but how the provider operates. As more software providers orient to a complete product experience, evaluations will be more robust.

The research results in Product Experience are ranked at 80%, or four-fifths, of the overall rating using the specific underlying weighted category performance. Importance was placed on the categories as follows: Usability (10%), Capability (25%), Reliability (15%), Adaptability (15%) and Manageability (15%). This weighting impacted the resulting overall ratings in this research. UiPath, ServiceNow and Automation Anywhere were designated Product Experience Leaders. While not Leaders, Appian and Pegasystems were also found to meet a broad range of enterprise product experience requirements.

Process Automation Platforms Product Experience

Providers	Grade	Performance
UiPath	B++	Leader 64.2%
ServiceNow	B++	Leader 63.9%
Automation Anywhere	B++	Leader 62.1%
Appian	B++	61.9%
Pegasystems	B++	61.3%
Nintex	B+	58.7%
SS&C Blue Prism	B+	58.7%
Microsoft	B+	57.9%
IBM	B+	56.9%
SAP	B+	56.6%
MuleSoft	B+	56.1%
Tungsten Automation	B	52.9%
Newgen	B	52.5%
ProcessMaker	B	51.3%
Datamatics	B	50.0%
Nividous	C++	43.7%
Worksoft	C++	43.4%
Fortra	C+	39.3%

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Customer Experience

The importance of a customer relationship with a software provider is essential to the actual success of the products and technology. The advancement of the Customer Experience and the entire life cycle an enterprise has with its software provider is critical for ensuring satisfaction in working with that provider. Technology providers that have chief customer officers are more likely to have greater investments in the customer relationship and focus more on their success. These leaders also need to take responsibility for ensuring this commitment is made abundantly clear on the website and in the buying process and customer journey.

The research results in Customer Experience are ranked at 20%, or one-fifth, using the specific underlying weighted category performance as it relates to the framework of commitment and value to the software provider-customer relationship. The two evaluation categories are Validation (10%) and TCO/ROI (10%), which are weighted to represent their importance to the overall research.

The software providers that evaluated the highest overall in the aggregated and weighted Customer Experience categories are ServiceNow, UiPath and IBM. These category Leaders best communicate commitment and dedication to customer needs. While not Leaders, MuleSoft, Microsoft and Appian were also found to meet a broad range of enterprise customer experience requirements.

Software providers that performed well in this category provided sufficient customer case studies to demonstrate success and have articulated their commitment to customer experience and an enterprise’s journey. The selection of a software provider means a continuous investment by the enterprise, so a holistic evaluation of any provider must include examination of how they support their customer experience.

Process Automation Platforms Customer Experience

Providers	Grade	Performance
ServiceNow	A-	Leader 17.3%
UiPath	A-	Leader 16.3%
IBM	B++	Leader 16.1%
MuleSoft	B++	16.0%
Microsoft	B++	15.9%
Appian	B++	15.8%
Automation Anywhere	B++	15.7%
SAP	B++	15.4%
Fortra	B+	14.7%
SS&C Blue Prism	B+	14.0%
Pegasystems	B+	13.9%
Nintex	B+	13.9%
Tungsten Automation	B	13.2%
Datamatics	B	13.0%
ProcessMaker	B-	12.2%
Nividous	B-	11.7%
Newgen	B-	11.7%
Worksoft	C++	10.1%

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Appendix: Software Provider Inclusion

For inclusion in the ISG Buyers Guide™ for Process Automation Platforms in 2024, a software provider must be in good standing financially and ethically, have at least \$30 million in annual or projected revenue verified using independent sources, sell products and provide support on at least two continents, and have at least 100 employees. The principal source of the relevant business unit's revenue must be software-related, and there must have been at least one major software release in the last 18 months.

The research is designed to be independent of the specifics of software provider packaging and pricing. To represent the real-world environment in which businesses operate, we include providers that offer suites or packages of products that may include relevant individual modules or applications. If a software provider is actively marketing, selling and developing a product for the general market and it is reflected on the provider's website that the product is within the scope of the research, that provider is automatically evaluated for inclusion.

All software providers that offer relevant process automation platform products and meet the inclusion requirements were invited to participate in the evaluation process at no cost to them.

Software providers that meet our inclusion criteria but did not completely participate in our Buyers Guide were assessed solely on publicly available information. As this could have a significant impact on classification and ratings, we recommend additional scrutiny when evaluating those providers.



Products Evaluated

Provider	Product Names	Version	Release Month/Year
Appian	Process Automation Platform	v. 24.3	August 2024
Automation Anywhere	Automation Workspace	v. 33.0	September 2024
Datamatics	TruBot RPA	v. 5.3	November 2023
Fortra	Automate Ultimate	v. 24.2.0	June 2024
IBM	Robotic Process Automation	v. 23.0	September 2024
Microsoft	Power Automate	v. 2401.3	August 2024
MuleSoft	MuleSoft RPA	v. 6.7.0	August 2024
Newgen	NewgenONE Platform	2024 Release	June 2024
Nintex	Nintex RPA	v. 24.4	April 2024
Nividous	Intelligent Automation Platform	2024 Release	September 2024
Pegasystems	Pega Platform	v. 24.1.1	July 2024
ProcessMaker	BPA Platform	2024 Release	September 2024
SAP	SAP Build Process Automation	2024 Release	September 2024
ServiceNow	Automation Engine	Xanadu Release	August 2024
SS&C Blue Prism	Enterprise Platform	v. 7.3	June 2024
Tungsten Automation	Tungsten RPA	v. 11.5.0	May 2024
UiPath	Business Automation Platform	v. 2023.10.5	August 2024
Worksoft	Connective Automation Platform	2024 Release	September 2024



Providers of Promise

We did not include software providers that, as a result of our research and analysis, did not satisfy the organizational criteria for inclusion in this Buyers Guide. These are listed below as “Providers of Promise.”

Provider	Product	Annual Revenue Over \$30M	Operates on Two Continents	At Least 100 Employees	Sufficient Public Information to Evaluate
aiwozo	Enterprise Automation Suite	No	Yes	No	
AutomationEdge	Robotic Process Automation	No	Yes	Yes	
EdgeVerve	AssistEdge RPA	No	Yes	No	
Kognitos	Generative AI Platform	No	Yes	No	
Laiye	Intelligent Automation Platform	No	Yes	Yes	
NICE	Robotic Automation	Yes	Yes	Yes	No
Rezolve.ai	AI Automation Studio	No	Yes	No	
SAP*	Signavio	No	Yes	No	
WorkFusion	Work.AI	Yes	Yes	Yes	No

* Note: SAP Signavio is a separate business unit from SAP Build.



About ISG Software Research

ISG Software Research provides authoritative market research and coverage on the business and IT aspects of the software industry. We distribute research and insights daily through our [community](#), and we provide a portfolio of consulting, advisory, research and education services for enterprises, software and service providers, and investment firms. Our premier service, ISG Software Research On-Demand, provides structured education and advisory support with subject-matter expertise and experience in the software industry. ISG Research Buyers Guides support the RFI/RFP process and help enterprises assess, evaluate and select software providers through tailored [Assessment Services](#) and our Value Index methodology. Visit www.ventanaresearch.com to sign up for free community membership with access to our research and insights.

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