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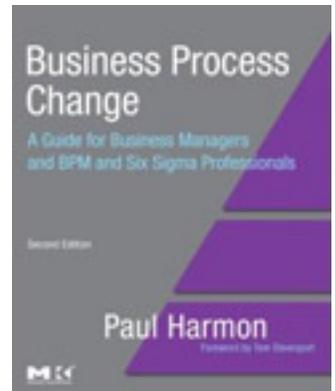
BPM Software Products

BPTrends began discussing the market for BPM software products in 2003, soon after we launched the BPTrends website. Over the years, we've published a wide variety of Articles on the different types of BPM Software products and we will continue to do so in the future. In 2005, we launched the BPTrends Software Product Reports - a series of Reports designed to provide our readers with an understanding of the software products market and a single source of information regarding the features of most of the BPM tools available at that time.

We decided not to evaluate the products or rank them in the way that Gartner, Forrester or some of the other analysts do. Instead, we established a set of features that a tool might have and worked with each vendor to provide a description of how their tool supported (or didn't support) each feature. By presenting the tools in a standard format we sought to avoid comparing hammers and screwdrivers. Instead, we opted for providing our readers with a means of comparing the tools against a standard set of criteria.

We provided an overview of the market that recognized that there were different types of software tools that could be used for different purposes. In our initial Report we identified three major categories of products:

- **Enterprise Process Modeling**



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and Simulation Tools - tools that were good at enterprise modeling and specific process modeling. Most also included some simulation capabilities. We excluded the non-repository based modeling products, like Visio, and termed them simple graphical products, although they also play an important role in the BPM market. Most of these products began life in the Nineties as CASE tools.

- **BPMS Suites** - tools designed to not only model but also to execute runtime processes. Although the classification was new in the early Zeros, most of these tools were originally designed as either Workflow tools or Enterprise Application Integration (EAI) tools in the Nineties.
- **Business Rules Tools** - tools designed to manage rule repositories, or to manage the automated execution of rule sets to reach a conclusion. Most of these tools were Expert System tools in the late Eighties and early Nineties. Most had been reconfigured to support the increasingly popular business rules movement.

We described the origins of these various tools to stress that most were not developed specifically for BPM business process management practitioners, but were repurposed when BPM became a hot area in the early Zeros. Thus, each tool bore the signs of its earlier development and each vendor spent a good bit of the last 5 years trying to figure out how to best tailor their product for BPM.

The larger vendors approached the problem by simply buying a variety of tools. IBM, to cite the best known example, acquired Holosofx (modeling, 2002), Filenet (documentation, 2006), TeleLogic (that had earlier acquired Popkin, modeling, 2007), Cognos (BI,

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2007), Aptsoft (event monitoring, 2008) and ILOG (rules, 2009).

Somewhere along the way, the leading vendors stopped thinking so much about BPMS and started thinking about a BPM platform - a software suite that provides the full range of capabilities that a process practitioner needs in order to deal with all aspects of process change. The transition to thinking of a platform rather than a BPMS tool was driven by the increasing emphasis on a Service Oriented Architecture (SOA) and Cloud computing. Frankly, no one knows where all this will end, but each of the major vendors is expanding their idea of what an ideal BPM platform might include and struggling to integrate all the components they have acquired to support their vision.

Unfortunately, for those of us who specialize in trying to provide an overview of the market, this poses a significant challenge. There are still lots of small and mid-size vendors offering specialized modeling or rule tools, there are mid-sized vendors offering more or less sophisticated BPMS tools, and there are large vendors, like IBM, Oracle, SAP and Microsoft, who are working to define an even more comprehensive BPM platform that will include not only tools, but extensive new infrastructure capabilities.

At the same time that the software vendors are struggling to rapidly evolve more sophisticated software products, most users are still struggling to move their organizations from a CMM level 2 to a CMM level 3. In other words, most companies are focused on defining departmental processes. Most are only beginning to undertake enterprise-wide process work, and few are ready for integrated process management/monitoring tools that can manage processes in real time. The

software vendors are way ahead of their customers and are going to struggle for awhile as their potential customers struggle to get to the point where they can use the tools that the software vendors are delivering.

This is not to say that the best of the BPMS vendors aren't generating profits, but most are struggling to achieve the kind of growth they initially projected. And, of course, the economic slowdown hasn't helped anyone. Still, Lombardi, not the largest BPMS vendor, but a long time player, announced on Aug 19th that they had achieved double-digit revenue growth in the 1st half of 2009 compared to the same period in 2008, were profitable, and had added to their cash reserves during the first half of this year. There has been lots of consolidation but the market is still growing and changing quite rapidly. There are still dozens of BPM software vendors and the market is nowhere near mature. SoftwareAG's recent bid for IDS Scheer provides an excellent example of the kinds of change we can expect to see over the next several years.

Given the current market, we struggled to determine how to create a new, useful set of comparative BPM software product reports. In the end, we decided to provide readers with an updated overview of the market, followed by detailed descriptions of vendor products divided into four categories. We have retained the original three categories, each somewhat expanded to reflect new developments, and added a fourth category; Monitoring, Mining and BI Tools. The four categories for the new Report are:

- **Enterprise, Process Modeling and Simulation Tools**
- **BPM Suites and BPM Platforms**
- **Business Rules Management Tools**
- **Monitoring, Mining and BI Tools**

One could easily think of all the specific tools, like modeling tools or BI tools, as simply elements in a BPM Platform, but that would not meet the needs of the current market. A company at CMM level 2 does not need a BPMS tool. It needs a modeling tool, or a business rules tool. It's only as organizations become more mature that they need more sophisticated and more tightly integrated tools.

In another five years, most organizations will, indeed, be buying Suites or Platforms, just as companies today buy a complete integrated Office Suite rather than buying Word or Excel. In the meantime, however, the market is still complex and there are lots of smaller niches that are being effectively exploited by smaller vendors. Our Report will be designed to reflect this diversity, and will place an emphasis on the particular strategies that the various vendors are pursuing.

Hopefully, the new Report on today's business process software products will help users better understand their options and contribute to the continuing evolution of the market.

One of the resources we will draw from as we develop the Overview of the current state of the BPM market will be the data collected from our current BPTrends BPM Market Survey. If you haven't already participated in the survey we urge you to do so now. Please go to www.bptrends.com and click on the survey button at the top right of the BPTrends HOMEPAGE.

If you are a vendor and would like to participate in the new BPTrends BPM Software Product Report, please contact Carolyn Potts, Managing Editor, BPTrends, at capotts@bptrends.com. She will be happy to provide you with the details.

Till next time,

Paul Harmon

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