

The Forrester Wave™: Digital Process Automation Service Providers, Q3 2020

The 13 Providers That Matter Most And How They Stack Up

by Rob Koplowitz and John Bratincevic

September 23, 2020

Why Read This Report

In our 22-criterion evaluation of digital process automation (DPA) service providers, we identified the 13 most significant ones — Accenture, BP3, Coforge (formerly Incessant Technologies), Cognizant, EPAM, HCL Technologies, Infosys, KPMG, Perficient, Persistent, Princeton Blue, Virtusa, and Wipro — and researched, analyzed, and scored them. This report shows how each provider measures up and helps application development and delivery (AD&D) professionals select the right one for their needs.

Key Takeaways

Infosys, Virtusa, And KPMG Lead The Pack

Forrester's research uncovered a market in which Infosys, Virtusa, KPMG, Cognizant, BP3, and Wipro are Leaders; HCL Technologies, Coforge, Accenture, Princeton Blue, and Persistent are Strong Performers; and Perficient and EPAM are Contenders.

Strategy, Process Discovery/Analysis, And Citizen Dev Support Were Key Differentiators

As the scale and complexity of process automation needs increase, organizations need support from service providers. Vendors that can provide strategic consulting and process discovery and support citizen-led application development will position themselves to successfully deliver process automation to their customers.

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DPA Service Providers Must Lead The Process Imperative

Process automation plays a critical role in driving digital transformation. The ability to adapt in a changing world requires AD&D leaders to rethink how processes are discovered, analyzed, and automated. Furthermore, all of this must happen against a backdrop of constantly — and in some cases, instantly — changing requirements. The most dramatic force driving this process automation imperative has been COVID-19, which pushed more than 60% of organizations to change their strategy and goals for process automation.¹

But make no mistake. COVID-19 didn't create the need for a more comprehensive approach to process automation — it revealed it. This is the new speed of business. Most organizations are not prepared for such radical change in their process automation strategies, and many will turn to DPA service providers to help navigate a complex and changing landscape that will touch all parts of their business. As a result of these trends, DPA service provider customers should look for providers that:

- › **Offer strategy consulting to ensure technology supports organizational goals.** The value of automation is clear. The challenge is understanding the application of technology in support of strategic organizational objectives. Some service providers offer dedicated strategy consulting independent of technology implementation. In these instances, the DPA service provider executes on the technology vision, often driving new operational models. Others provide specific business insight to drive best practices for existing processes that require reengineering and automation.
- › **Understand the full process landscape.** Gone are the days when a service provider could thrive on expertise in just DPA technology. That's table stakes now. As the complexity and sophistication of process automation increases, vendors must offer expertise in a large array of heterogeneous process automation tools as well as supporting technologies like process mining, modeling, and documentation. In addition, the vendor must offer services and methodologies to support best practices for adoption and use of these tools across all relevant stakeholders.
- › **Drive process automation at scale by enabling citizen development.** Automating the many processes managed in paper forms, spreadsheets, emails, and other manual tools is a monumental task, and the need to constantly adapt applications makes it even harder. The most credible strategy to attack this long tail of automation needs is through empowered citizen developers. While this is an emerging capability, some providers surprise with the depth of their services in this area. The best examples demonstrated IP aimed at the specific needs of citizen developers, governance models for self-service, and thought leadership on the path to establish a truly digital culture for continuous improvement. At a minimum, the provider should have a method for delegating specific development tasks to businesspeople, with an eye toward maturing them into autonomous developers and application owners.

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Evaluation Summary

The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market and does not represent the entire vendor landscape.

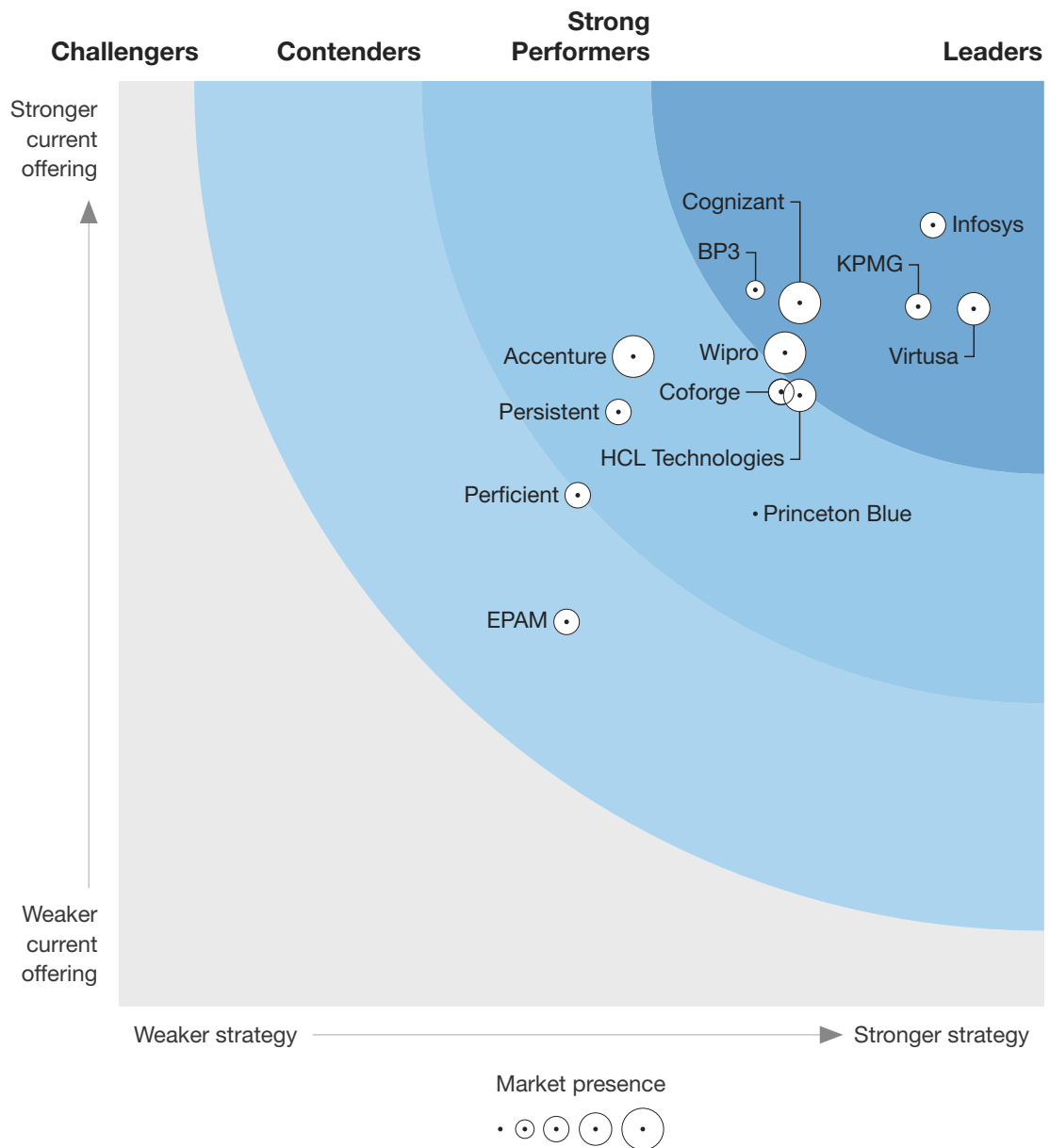
We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on [Forrester.com](https://forrester.com) to download the tool.

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FIGURE 1 Forrester Wave™: Digital Process Automation Service Providers, Q3 2020**THE FORRESTER WAVE™****Digital Process Automation Service Providers**

Q3 2020



The Forrester Wave™: Digital Process Automation Service Providers, Q3 2020

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FIGURE 2 Forrester Wave™: Digital Process Automation Service Providers Scorecard, Q3 2020

		Forrester's weighting	Accenture	BP3	Coforge	Cognizant	EPAM	HCL Technologies	Infosys	KPMG	Perficient	Persistent	Princeton Blue	Virtusa	Wipro
Current offering	50%	3.51	3.87	3.32	3.80	2.08	3.30	4.22	3.78	2.76	3.21	2.66	3.77	3.53	
Breadth of services	60%	3.32	3.92	3.42	3.22	1.95	3.10	4.22	4.20	2.38	2.46	2.00	3.28	3.38	
Implementation and delivery models	30%	3.60	3.60	3.00	5.00	1.80	3.80	4.40	3.20	3.00	5.00	4.20	5.00	3.80	
Expertise and certifications	10%	4.34	4.34	3.66	3.66	3.66	3.00	3.66	3.00	4.34	2.32	1.98	3.00	3.66	
Strategy	50%	2.78	3.44	3.58	3.68	2.42	3.68	4.40	4.32	2.48	2.70	3.44	4.62	3.60	
Market vision	29%	3.00	3.00	5.00	3.00	1.00	3.00	5.00	5.00	3.00	3.00	3.00	5.00	3.00	
Market approach	22%	3.00	5.00	3.00	3.00	3.00	3.00	5.00	5.00	3.00	3.00	5.00	5.00	3.00	
Innovation roadmap	4%	5.00	3.00	3.00	5.00	3.00	5.00	5.00	3.00	5.00	3.00	3.00	3.00	3.00	
Partner ecosystem	15%	3.00	3.00	3.00	5.00	3.00	5.00	3.00	3.00	3.00	1.00	1.00	3.00	5.00	
Commercial model	15%	3.00	3.00	3.00	5.00	5.00	5.00	5.00	3.00	1.00	3.00	3.00	5.00	5.00	
Execution roadmap	15%	1.00	3.00	3.00	3.00	1.00	3.00	3.00	5.00	1.00	3.00	5.00	5.00	3.00	
Market presence	0%	4.01	1.33	2.33	4.32	2.68	4.00	3.00	2.99	2.67	2.33	1.00	3.01	4.01	
Number of customers	33%	3.00	2.00	3.00	5.00	1.00	3.00	3.00	4.00	2.00	3.00	1.00	2.00	3.00	
Revenue	33%	4.00	1.00	2.00	5.00	3.00	5.00	3.00	3.00	3.00	2.00	1.00	3.00	4.00	
Average deal size	34%	5.00	1.00	2.00	3.00	4.00	4.00	3.00	2.00	3.00	2.00	1.00	4.00	5.00	

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

Vendor Offerings

Forrester included 13 vendors in this assessment: Accenture, BP3, Coforge, Cognizant, EPAM, HCL Technologies, Infosys, KPMG, Perficient, Persistent, Princeton Blue, Virtusa, and Wipro. We invited Capgemini and Deloitte to participate in this Forrester Wave, but they chose not to participate, and we could not make enough estimates about their capabilities to include them in the assessment as nonparticipating vendors.

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Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

Leaders

- › **Infosys leads by investing heavily in the future of DPA.** Infosys has a long history in process automation and a deep, impressive résumé in executing large and sophisticated projects. Infosys differentiates through its view on the future of DPA with significant investments to drive that vision. Infosys executes DPA projects primarily in North America, Europe, and Asia. While strong in strategy consulting, reference clients indicated that strategy work was in the context of project work rather than at the executive level leading to technology change.

Infosys excels in areas related to wide technology deployment. Process discovery, modeling, and documentation are all strengths — with extensive partnerships to match. Its work enabling citizen developers is also industry-leading, with investments in unique IP to ease the development experience on DPA platforms and provide in-context feedback through virtual coaches. Infosys's customer experience methodology is also very mature, and reference client feedback indicated strong customer experience results. Infosys is a good choice when you have a wide range of sophisticated DPA needs that require deep technical and process expertise.

- › **Virtusa is a technology and delivery rock star.** While Virtusa demonstrated strengths in multiple evaluation areas, it's hard to ignore its core technology expertise. Virtusa leads process automation projects with a methodology to align delivery with application modernization. Its methodology assesses the existing technology landscape and includes enterprise architects in the delivery process to ensure technology alignment. Virtusa's technical strengths are widely recognized among DPA software providers, and it has actively participated in core engineering efforts with Pega and multiple low-code platforms.

Virtusa's delivery methodology is strong. More importantly, reference clients rated it consistently high on delivery quality that was on time and within budget. One client stated, "It has routinely provided the best customer service of all the providers we work with." Virtusa also invests heavily in innovation with significant unique IP and dedicated DPA labs where clients can explore leading-edge process automation. Virtusa is a good fit for companies that require very strong technical skills and are looking to push to the cutting edge of technology, including application modernization.

- › **KPMG's strategy expertise gets backing from broad capabilities to support DPA.** KPMG leads clients in identifying and aligning with critical business objectives. As KPMG moves from strategy to execution, it brings a forward-looking viewpoint on the need for adaptable technology and use of low code for core modernization. Its early and aggressive investment in low-code tools and methodologies to augment traditional DPA supports this approach by driving more rapid and agile development. KPMG has also made significant investments in process discovery, modeling, documentation, and methodologies to drive these capabilities deep into the business.

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KPMG does best in strategy and design to support DPA, with strong capabilities to deliver. Reference clients see KPMG as a strategic partner that works closely with executives to establish key strategies critical to success. Design services rate highly, and clients use them across a wide array of initiatives. KPMG also excelled in wide technology deployment and process discovery at scale. KPMG is a good fit for large companies looking to drive business strategy through technology implementation and adoption across the organization.

- › **Cognizant relies on innovation and technology partnerships to succeed.** Cognizant's DPA practice focuses on financial services, healthcare, insurance, communications, media, and technology. Cognizant excels in applying innovation within the context of process automation projects. One reference client liked its "partnership, technology expertise, innovation, and can-do attitude." Cognizant is less focused on the emerging role of citizen developers than other vendors in this evaluation, concentrating instead on leveraging its own technology and innovation resources.

The investments in innovation span multiple areas. These include DPA innovation centers with dedicated staff from Cognizant, technology partners where clients can get hands-on experience with emerging process automation technologies, and extensive prebuilt and supported IP and packaged add-on solutions. Cognizant also maintains extensive technology partnerships to drive end-to-end process solutions across a heterogeneous technology landscape. Cognizant's delivery methodology is very strong, and reference clients indicate high-quality, on-time, and on-budget delivery. Cognizant is a good choice for North American companies with sophisticated DPA needs that are looking to push innovation boundaries.

- › **BP3 focuses on process optimization and execution to serve NA and Europe.** BP3 is one of the smaller firms in this evaluation and uses focus as a differentiator. While it is not a business strategy consulting firm, its business insight and ability to execute drive exceptional outcomes. Given the emphasis it brings to its market approach, BP3 drives very strong results. Reference clients were overwhelmingly positive on all aspects of delivery. One client said that BP3's greatest strength is its people, "Honest, talented, hardworking — they truly have their clients' best interests at heart."

BP3 also places focus on process expertise through execution with extensive and well-defined partnerships and methodologies. It brings highly qualified resources to projects and received high scores in this evaluation for both process and technology certifications. BP3 excels in process discovery with a very mature approach to modeling and process documentation. BP3 is a good fit for companies in North America (NA) and Europe with a strong desire for process excellence, particularly in financial services and healthcare.

- › **Wipro excels at wide implementations but is not your business strategy partner.** Wipro's clients are primarily in NA and Europe, with a focus on financial services and manufacturing. It excels in many technology categories and is an early advocate of the role of citizen developers and wide process automation implementations. Reference clients liked the availability of quality

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technical resources on demand and Wipro's flexible commercial model. Wipro's customer references benefited from Wipro's ability to apply advanced technologies and techniques to drive business results.

Wipro supports wide DPA deployments through substantial investments in governance models, process analysis, and platform IP to focus, simplify, and scale the development of many DPA applications. Citizen developer enablement is a strength, with impressive proof points of wide, autonomous deployments led by businesspeople. It also provides the flexible pricing models that suit wide deployments and large deals. Wipro offered less evidence of traditional strategy consulting and instead strongly focused on technology-driven innovation. Wipro is a good fit for companies looking to drive deep and broad automation and unleash citizen developers; it's less suitable for companies looking to drive a new business strategy from the top down rather than from technology.

Strong Performers

- › **HCL leverages customer experience and innovation to differentiate.** HCL's DPA practice works primarily in NA and Europe, focusing on financial services, life sciences, and manufacturing. One reference client that executed an end-to-end digital banking customer journey commented that it appreciated HCL's "ability to drive business forward within our key performance indicators (KPIs)." HCL has a well-defined delivery methodology, but performance on technology implementation could use improvement.

HCL places a premium on significant R&D investment, pushing the boundaries of innovation in DPA. This approach is seen in significant prebuilt IP that can be leveraged to drive faster time-to-value and greater technology range than most others in this evaluation. This tech-driven approach also shines in using application modernization as part of its strategy for DPA deployments. HCL's approach to the emerging area of process mining, analytics, modeling, and documentation is less mature than others in the evaluation, but it is currently investing in it. Use HCL when your project requires cutting-edge innovation, particularly for financial services and manufacturing.

- › **Coforge empowers customers but focuses less on wide deployments.** Coforge is primarily (but not exclusively) a Pega practice and focuses entirely on DPA services. It also emphasizes a coproduction model with clients to foster a culture of innovation and continuous improvement. As a point of philosophy, projects are not technology driven and instead align to business KPIs and strategy. The majority of Coforge's clients are in NA, Europe, and Australia, and its domain expertise focuses primarily on insurance, transportation, and banking and financial services.

Coforge's TOGAF-based methodology for analyzing and planning app modernization stood out in this assessment for its thoroughness and clarity. Reference clients validated the quality of Coforge's project delivery methodology and its collaborative focus, with one client remarking that Coforge consultants "really feel like they are part of the team . . . rather than being suppliers." Citizen developer enablement is also a strength, with solid examples of citizen developer

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programs implemented at scale. Coforge is less focused than other vendors on wide automation deployments and lacks the broad domain expertise of some competitors. Use Coforge for Pega-based implementations where a collaborative coproduction approach is desired.

- › **Accenture is strong in strategy and design but falls short on change management.** Accenture leverages its long-standing strength and credibility in strategy consulting to engage clients at the executive level. One financial services reference client leveraged Accenture to drive a digital banking strategy by establishing a digital-only subsidiary to technology execution. The majority of Accenture's DPA clients are in NA and Europe and predominantly in health and public service, financial services, and communication services.

Accenture offers best practices based on skills and methodologies from its Fjord acquisition and makes design a critical aspect of every part of every project. Accenture reference clients cited excellent execution on very sophisticated DPA projects. Accenture focuses less on emerging aspects of DPA like enabling clients to drive wide automation. Accenture's approach to change management was also below par, with little emphasis placed on organizational alignment in its DPA methodologies. Reference clients expressed concerns about Accenture's commercial model, with one reference commenting that rates were too high for an onshore and offshore blended delivery team. Accenture is a good fit for large companies that want to drive business strategy through a few large user-experience-driven DPA projects.

- › **Princeton Blue excels in a single domain but lacks in capabilities related to scale.** Princeton Blue continues to hone its market approach. It has doubled down on a successful partnership with Appian for DPA technology while driving deeper into pharmaceuticals as a primary vertical focus with a growing practice in financial services. Strategy consulting tends more toward the application of vertical expertise than top-down reengineering. Princeton Blue drives consistent value while keeping project costs low. It also places a premium on working side by side with clients to drive skills transfer throughout projects.

Princeton Blue excels in change management, delivery methodology, and market approach. It offers a very clear and successful strategy for project execution, which leads Princeton Blue to engage in project-based work rather than broad digital transformation initiatives. Thus, it invests less in process discovery technology or broad enablement of citizen developers. Reference clients praised Princeton Blue for its business expertise and "collaborative culture," while noting that its small size and narrow technology focus made it unsuitable for large, diverse technology engagements and wide deployments. While Princeton Blue works across multiple industries and technologies, it best suits Appian projects in the pharma industry.

- › **Persistent Systems has great delivery models but misses on citizen development.** Persistent is a large boutique-style firm focused on financial services, healthcare, manufacturing, and high tech. Clients are primarily in NA. Persistent Systems is a technology-first firm, with app

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modernization foundational to its DPA methodologies and a “digital mosaic” approach to industry-specific IP and architectures positioned as a differentiator. Appian, OutSystems, and Salesforce are its primary platforms for DPA and low-code engagements.

Persistent’s “digital mosaic” approach to modernization and architecture is a strength, as is its extensive library of accelerators and packaged solutions for its target industries. Persistent’s implementation methodologies are also exceptional, combining design thinking, hackathons, and an industry-respected center-of-excellence model to drive superior results. Reference clients confirmed Persistent’s delivery expertise and noted that the firm “embodies the concept of a partner.” Persistent is behind the curve on citizen developer enablement, focusing instead on hackathons to collaborate with businesspeople. Also, Persistent’s strategy consulting is only in the context of technology projects, and the vendor’s number of traditional (Lean/Six Sigma) process experts is fewer than other vendors in this assessment. Persistent is a good fit for modernization-driven engagements in the vendor’s target industries where traditional process expertise and process mining aren’t needed.

Contenders

› **Perficient is serious about certifications but doesn’t scale process discovery — yet.**

Perficient’s home turf is healthcare and financial services in NA. It partners with Appian, Pega, IBM, Salesforce, and Microsoft for its DPA and low-code work. Perficient’s entire team of DPA consultants is officially certified in one or more DPA technologies, and the firm has an unusually high ratio of Lean/Six Sigma-certified consultants. Its approach to automation focuses on the intersection of process orchestration, robotic process automation (RPA), and AI.

Automation-focused strategy and modern app architectures are both strengths with well-defined methodologies. Also, reference clients praised the firm’s “proficiency in all aspects of the technology stack.” Perficient brings passion and expertise on human-focused, formal change management to its engagements — though reference client feedback on the subject was mixed. Perficient had no process mining capabilities or partnerships at the time of this assessment. But it was finalizing a partnership in process mining. Use Perficient for heterogeneous DPA engagements anchored by traditional (manual) process discovery and expertise.

› **EPAM is great at RPA at the cost of traditional DPA.** EPAM provides a thoughtful, thorough approach to tech-driven process discovery and RPA automation at scale, backed by modest Pega and Appian practices. EPAM operates primarily in NA and Europe with a focus on financial services and life sciences/healthcare. Client feedback focused on technology skills with one client stating, “EPAM has clearly outstanding delivery quality and technical expertise.” Reference clients did not utilize EPAM for extensive strategy or customer experience work.

Highly flexible commercial models are a strength, and its DPA technology certifications are impressive — all EPAM process consultants are officially certified in one or more process technologies. Reference clients also validated EPAM’s technical expertise in app modernization.

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However, a near-exclusive emphasis on RPA for wide deployments suggests that the vendor's capabilities in traditional DPA and low-code application development are immature. EPAM also received lower-than-average responses from reference clients on strategy consulting and implementation methodology. EPAM is a good fit for companies that are betting heavily on RPA but also need some traditional DPA apps to anchor their larger processes.

Evaluation Overview

We evaluated vendors against 22 criteria, which we grouped into three high-level categories:

- › **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include strategy consulting, citizen development, process discovery/modeling/documentation, and application modernization.
- › **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated market vision, market approach, innovation roadmap, partner ecosystem, commercial model, and execution roadmap.
- › **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's number of customers, revenue, and average deal size.

Vendor Inclusion Criteria

Forrester included 13 vendors in the assessment: Accenture, BP3, Coforge, Cognizant, EPAM, HCL Technologies, Infosys, KPMG, Perficient, Persistent, Princeton Blue, Virtusa, and Wipro. Each of these vendors has:

- › A dedicated DPA practice and technology partnerships with vendors in Forrester's DPA Wave.
- › The ability to deliver low-code applications and enable client business users to participate in the development process, with proven change management capabilities.
- › A proven track record of delivering process automation in the context of larger digital transformation initiatives.
- › Consulting offerings that cover strategy, user experience, and change management, along with technology.
- › Dedicated IP to accelerate project execution time and support vertical and/or horizontal use cases.
- › Relevance to Forrester clients represented in inquiries and client consulting.

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Supplemental Material

Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows [The Forrester Wave™ Methodology Guide](#) to evaluate participating vendors.

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In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by July 2020 and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with [The Forrester Wave™ Vendor Review Policy](#), Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with [The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy](#) and publish their positioning along with those of the participating vendors.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the [Integrity Policy](#) posted on our website.

Endnotes

¹ In Forrester's Q1 2020 Digital Process Automation COVID-19 Survey, 62% responded that their strategy and goals for process automation had changed as a result of broken processes or economic circumstances because of COVID-19. Source: Forrester's Q1 2020 Global Digital Process Automation COVID-19 Survey.

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