Key Takeaways

Appian, Pegasystems, IBM, And Newgen Software Lead The Pack

Forrester’s research uncovered a market in which Appian, Pegasystems, IBM, and Newgen Software are Leaders; bpm’online, TIBCO Software, OpenText, Hyland, DST Systems, and Eccentex offer competitive options. AINS lags behind.

I&O Pros Are Looking For Case Platforms To Support A Variety Of Use Cases

The DCM market is growing because more I&O professionals see these solutions as a way to address their top challenges. The challenges result from changes in the nature of work, which is moving from production- and task-based to knowledge- and context-driven.

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

As workflow and business process management (BPM) become outdated and less effective for less-structured work patterns, improved analytics and information modeling will dictate which providers come out on top.

Why Read This Report

In our 23-criteria evaluation of cloud-based dynamic case management (DCM) providers, we identified the 11 most significant ones — AINS, Appian, bpm’online, DST Systems, Eccentex, Hyland, IBM, Newgen Software, OpenText, Pegasystems, and TIBCO Software — and researched, analyzed, and scored them. This report shows how each provider measures up and helps infrastructure and operations (I&O) professionals make the right choice.
The Forrester Wave™: Cloud-Based Dynamic Case Management, Q1 2018
The 11 Providers That Matter Most And How They Stack Up

by Craig Le Clair
with Glenn O’Donnell, Robert Perdoni, and Diane Lynch
March 8 2018

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Choosing Between Specialist Solutions And Dynamic Case Management Platforms

The Forrester Wave™: Dynamic Case Management, Q1 2016
Case Providers Respond To Cloud And Specialist Competition

I&O pros now use multiple platforms to support a case management process. Domain-specific clouds like Atlassian Jira, Salesforce, and ServiceNow; fit-to-purpose solution specialists; and a host of options under the digital process automation (DPA) umbrella are now in the mix. Case management platform vendors have responded by extending solution frameworks and beefing up their own cloud capabilities (see Figure 1). Forrester expects to see more confusion as the solution landscape expands.

› **Established DPA platforms remain incumbents.** DPA includes traditional BPM, DCM, and low-code software support. BPM and DCM handle complex, long-running processes that require extensive upfront modeling followed by long development and continuous improvement cycles. In the past two years, low-code platforms have emerged to allow a broader set of business stakeholders to codify dozens, if not hundreds, of manual and lighter processes.

› **Domain-specific cloud platforms are newer options.** Improved flexibility of cloud platforms has added to case management options. However, domain-specific cloud platforms lack depth in rules, data, and process design and aren’t yet competitive with traditional DCM options; thus, we haven’t included them in this Forrester Wave™ evaluation. A senior enterprise architect told us: “Our CIO wants rapid deployment. We can easily build screens and flows to collect data in Jira, but we’re concerned with not knowing the tipping point where deeper process support is needed.”

› **Fit-to-purpose packaged app vendors, niche-case solutions, and SIs remain in play.** Custom-developed solutions by systems integrators (SIs); packaged app vendors (e.g., Microsoft Dynamics, Oracle, and SAP internal process tooling); and niche-case solutions (e.g., legal matter management) also support case management. We group these three options together under the fit-to-purpose category, as they share many strengths and weaknesses. Superior data integration, domain expertise, and reduced application switching are arguments for fit-to-purpose, even at the cost of less agility, custom code dependencies, and lack of case management frameworks.

› **On-premises options stay in the mix.** We asked providers in this evaluation to supply cloud-only references, reflecting a shift in enterprise demand. This approach eliminated some case solutions that are primarily on-premises (e.g., Kofax TotalAgility) but nevertheless remain strong case options. In addition, several Microsoft-oriented solutions such as K2 and Nintex are viable for case applications, particularly in the Microsoft cloud environment.
FIGURE 1 Case Providers React To Competition From Domain-Specific Clouds And Specialists

DCM Vendors Reduce Complexity And Improve Packaging

The ability to build, use, deploy and change a case process continues to improve for the platforms we’ve evaluated, but there’s still work to do. Deployment options now offer public exchanges for packaged use cases and diverse cloud options, keeping pace with enterprise software trends.

Products Improve Design, Rules, And UI Development

DCM solution platforms are tackling increasingly complex use cases. The ability to abstract complexity through information and task design models, English expression editors for rules, integrated UI development tooling, and preconfigured templates and frameworks is the essence of a quality DCM product. Our evaluation reveals:
The importance of data management. A DCM design can now combine information-led modeling with traditional process-based design mapping. Why the new balance? First, it’s easier to communicate with the business about information flows than with process maps. And second, the less structured the process, the more the 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 vendors can build relationships among business objects or entities. Vendors offering advanced ways to visualize how information relates to a stage and the ability to support a drag-and-drop entity modeler within a state machine metaphor earned our highest ratings.

Maturity in preconfigured templates, accelerators, and external communities. Eight of the 11 vendors we evaluated are on a path to productize domain-specific accelerators. Some build case patterns from scratch with BPM tools, but most allow reusability of process and object fragments organized as templates to capture task steps, forms, rules, and data models that enterprises can reuse. The most advanced are prebuilt templates or frameworks for specific business processes such as insurance onboarding, plus generic case patterns, available in a public app store, for investigations, service requests, and incident management.

Stronger, but still diverse, rules management. Rules that drive state transitions now dominate case solutions. Vendors have responded with more capable rules management, but complexity is still a challenge. Most vendors have three types: rules that alter the UI and navigation, workflow/routing rules, and rules that affect information and context. The problem for enterprises is that rules each have their own configuration UI and are scattered across repositories, hampering centralized maintenance and governance.

Improved, but still disjointed, UI development environments. A significant amount of effort goes into building the case worker’s user interface. It’s common to expend 50% of all professional services in building a case solution. 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. This is no surprise, but the diverse tool sets make for sometimes confusing and often expensive development. Some customers find it attractive to ignore the vendor tools completely and build in separate environments like Adobe AER or Angular JS forms.

Enterprises Look To Cloud-Based DCM Platforms For More Than One Use Case

Enterprises want to develop skills — in particular, case platforms — and don’t want to allow proliferations of point solutions unless there’s compelling reason to do so.² This has become more difficult as risk reduction, scale, and control have shifted new case solutions to the cloud. From a deployment perspective, we see:
An expansion of government case management. Governments around the world are upgrading aging case management process and systems. Tax authorities, investigation, regulation, and human services are fast-growing use cases. Platform directions are trending toward cloud, with Amazon Web Services (AWS) and Microsoft Azure getting strong support.

Growth of cloud deployments. We required evaluated providers to provide cloud-only references, reflecting a shift in customer demand. The primary advantage lies in the ability to scale for contraction and expansion, lower the cost of compute and storage resources, and deploy rapidly. But web APIs available from the public cloud represent another important advantage, with self-service deployment and access to openly available data also proving attractive. All vendors reported strong growth in subscription revenues for on-premises and deployment of either a platform-as-a-service (PaaS) or software-as-a-service (SaaS) version of a case. PaaS solutions that expose the case development and execution platform take the lead over SaaS solutions that provide domain-specific or preconfigured case patterns. Fully managed services, complete with professional services, service-level agreements (SLAs), and complete application responsibility, are also less popular than PaaS.

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. Unsurprisingly, vendors that have advanced capture, content management, and customer communications assets, such as Hyland, IBM, Newgen Software, and OpenText, fall into the former category.

Cloud-Based Dynamic Case Management Evaluation Overview

To assess the state of the cloud-based dynamic case management market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top cloud-based DCM vendors. After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 23 criteria, which we grouped into three high-level buckets:

Current offering. To assess the breadth and depth of each vendor’s cloud-based dynamic case management offering, we evaluated each solution’s architectural support for DCM; cloud experience and capability; supporting capabilities; horizontal, cross-industry domain support; and implementation and case modeling.

Strategy. We reviewed each vendor’s strategy to assess how it plans to evolve its cloud-based DCM services to meet emerging customer demands. We also evaluated each vendor’s market approach, partner ecosystem, and planned enhancements.
Market presence. To establish each cloud-based DCM offering’s market presence, we evaluated its installed base, its overall cloud installed base and growth, and revenue for the provider’s overall case management business.

Evaluated Vendors And Inclusion Criteria

Forrester included 11 vendors in the assessment: AINS, Appian, bpm’online, DST Systems, Eccentex, Hyland, IBM, Newgen Software, OpenText, Pegasystems, and TIBCO Software (see Figure 2). Each of these vendors:

- Comes up in Forrester inquiry discussions and appears on client vendor selection shortlists.
- Supports investigative, incident management, and service request categories, thus demonstrating a horizontal case management platform.
- Demonstrates an innovative approach to case management.
- Uses a BPM platform and includes significant proprietary capabilities in key areas of technology for dynamic case management (e.g., social technologies and analytics).
- Has a case management solution framework that is distinguishable from the underlying BPM platform.
- Markets its products across multiple industries rather than being a “solution specialist,” as defined by Forrester.3
- Has significant cloud implementations for case management support.
- Earns revenue from DCM that exceeds $10 million.
FIGURE 2 Evaluated Vendors: Product Information And Inclusion Criteria

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Product evaluated</th>
<th>Version evaluated</th>
<th>Date evaluated</th>
</tr>
</thead>
<tbody>
<tr>
<td>AINS</td>
<td>eCase</td>
<td>10.1</td>
<td>Q1 2018</td>
</tr>
<tr>
<td>Appian</td>
<td>Appian Cloud</td>
<td>17.4</td>
<td>Q1 2018</td>
</tr>
<tr>
<td>bpm’online</td>
<td>bpm’online studio</td>
<td>7.11</td>
<td>Q1 2018</td>
</tr>
<tr>
<td>DST Systems</td>
<td>AWD10</td>
<td>8.5</td>
<td>Q1 2018</td>
</tr>
<tr>
<td>Eccentex</td>
<td>AppBase Dynamic Case Management</td>
<td>4.3</td>
<td>Q1 2018</td>
</tr>
<tr>
<td>Hyland</td>
<td>OnBase and ShareBase</td>
<td>17</td>
<td>Q1 2018</td>
</tr>
<tr>
<td>IBM</td>
<td>IBM Case Manager</td>
<td>5.3.2</td>
<td>Q1 2018</td>
</tr>
<tr>
<td>Newgen Software</td>
<td>Newgen OmniFlow iBPS Suite</td>
<td>3.1</td>
<td>Q1 2018</td>
</tr>
<tr>
<td>OpenText</td>
<td>Process Suite</td>
<td>16.3</td>
<td>Q1 2018</td>
</tr>
<tr>
<td>Pegasystems</td>
<td>Pega Platform</td>
<td></td>
<td>Q1 2018</td>
</tr>
<tr>
<td>TIBCO Software</td>
<td>Cloud Live Apps</td>
<td></td>
<td>Q1 2018</td>
</tr>
</tbody>
</table>

Vendor inclusion criteria

Each of the vendors we evaluated has:

- Appeared on clients’ vendor selection shortlists during Forrester inquiries.
- A solution that is widely applicable to use cases across three main case management categories — investigative, incident management, and service requests — thus demonstrating a horizontal case management platform.
- Demonstrated an innovative approach to case management.
- A BPM platform offering including significant proprietary capabilities in key areas of technology for dynamic case management, e.g., social technologies and analytics.
- A case management solution framework that is distinguishable from the underlying BPM platform.
- Marketed its products across multiple industries rather than being a “solution specialist,” as defined by Forrester.
- Significant cloud implementations or domain-specific cloud platforms that have the facility to build case management support.
- Revenues from DCM that exceed US$10 million.
Vendor Profiles

We intend this evaluation of the case management market to be a starting point only and 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 (see Figure 3 and see Figure 4). Click the link at the beginning of this report on Forrester.com to download the tool.
THE FORRESTER WAVE™
Cloud-Based Dynamic Case Management
Q1 2018

The 11 Providers That Matter Most And How They Stack Up

FIGURE 3 Forrester Wave™: Cloud-Based Dynamic Case Management, Q1 2018
## FIGURE 4 Forrester Wave™: Cloud-Based Dynamic Case Management Scorecard, Q1 2018

<table>
<thead>
<tr>
<th>Current offering</th>
<th>Forrester’s weighting</th>
<th>AINs</th>
<th>Appian</th>
<th>bpm’online</th>
<th>DST Systems</th>
<th>ECCENTIX</th>
<th>IBM</th>
<th>Newgen Software</th>
<th>OpenText</th>
<th>Pegasystems</th>
<th>TIBCO Software</th>
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<tbody>
<tr>
<td>Architectural support for DCM</td>
<td>50%</td>
<td>2.17</td>
<td>4.01</td>
<td>3.11</td>
<td>3.06</td>
<td>3.14</td>
<td>3.48</td>
<td>3.48</td>
<td>3.27</td>
<td>3.78</td>
<td>2.62</td>
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<tr>
<td>Cloud experience and capability</td>
<td>20%</td>
<td>1.66</td>
<td>3.66</td>
<td>3.00</td>
<td>3.00</td>
<td>2.32</td>
<td>3.00</td>
<td>3.00</td>
<td>3.66</td>
<td>4.34</td>
<td>3.00</td>
</tr>
<tr>
<td>Supporting capabilities</td>
<td>20%</td>
<td>2.32</td>
<td>4.32</td>
<td>3.68</td>
<td>4.34</td>
<td>3.00</td>
<td>3.68</td>
<td>3.00</td>
<td>2.32</td>
<td>3.00</td>
<td>3.00</td>
</tr>
<tr>
<td>Horizontal cross-industry domain support</td>
<td>20%</td>
<td>2.20</td>
<td>3.40</td>
<td>2.20</td>
<td>2.60</td>
<td>3.00</td>
<td>3.40</td>
<td>3.40</td>
<td>3.00</td>
<td>4.20</td>
<td>1.80</td>
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<tr>
<td>Implementation and case modeling</td>
<td>20%</td>
<td>2.98</td>
<td>4.34</td>
<td>3.68</td>
<td>2.34</td>
<td>2.32</td>
<td>5.00</td>
<td>5.00</td>
<td>3.00</td>
<td>4.34</td>
<td>1.00</td>
</tr>
<tr>
<td>Strategy</td>
<td>50%</td>
<td>1.68</td>
<td>4.32</td>
<td>3.00</td>
<td>3.00</td>
<td>4.34</td>
<td>3.68</td>
<td>3.68</td>
<td>3.00</td>
<td>3.68</td>
<td>3.00</td>
</tr>
<tr>
<td>Market approach</td>
<td>33%</td>
<td>1.68</td>
<td>4.34</td>
<td>3.66</td>
<td>2.34</td>
<td>2.34</td>
<td>3.00</td>
<td>4.32</td>
<td>3.66</td>
<td>3.00</td>
<td>3.68</td>
</tr>
<tr>
<td>Partner ecosystem</td>
<td>33%</td>
<td>1.00</td>
<td>5.00</td>
<td>3.00</td>
<td>3.00</td>
<td>3.00</td>
<td>5.00</td>
<td>3.00</td>
<td>5.00</td>
<td>5.00</td>
<td>5.00</td>
</tr>
<tr>
<td>Planned enhancements</td>
<td>33%</td>
<td>1.00</td>
<td>3.00</td>
<td>5.00</td>
<td>1.00</td>
<td>1.00</td>
<td>3.00</td>
<td>5.00</td>
<td>3.00</td>
<td>3.00</td>
<td>1.00</td>
</tr>
<tr>
<td>Market presence</td>
<td>0%</td>
<td>1.66</td>
<td>3.00</td>
<td>2.32</td>
<td>3.00</td>
<td>1.66</td>
<td>3.00</td>
<td>3.66</td>
<td>1.66</td>
<td>3.00</td>
<td>4.34</td>
</tr>
<tr>
<td>Evaluated version’s install base</td>
<td>33%</td>
<td>3.00</td>
<td>3.00</td>
<td>3.00</td>
<td>3.00</td>
<td>3.00</td>
<td>3.00</td>
<td>3.00</td>
<td>3.00</td>
<td>3.00</td>
<td>5.00</td>
</tr>
<tr>
<td>Overall cloud installed base and growth</td>
<td>33%</td>
<td>1.00</td>
<td>3.00</td>
<td>3.00</td>
<td>3.00</td>
<td>1.00</td>
<td>3.00</td>
<td>3.00</td>
<td>1.00</td>
<td>3.00</td>
<td>1.00</td>
</tr>
<tr>
<td>Revenue for overall case management business</td>
<td>33%</td>
<td>1.00</td>
<td>3.00</td>
<td>1.00</td>
<td>3.00</td>
<td>1.00</td>
<td>3.00</td>
<td>3.00</td>
<td>1.00</td>
<td>3.00</td>
<td>5.00</td>
</tr>
</tbody>
</table>
Leaders Excel At Analytics And Solution Accelerators

Leaders stand out due to sophistication in the technologies that will extend DCM to its ultimate potential: understanding the worker’s and customer’s context, providing real-time guidance, and enabling future case planning. Analytics, information-led design, declarative rules, and advanced UI support are the essential ingredients to future case excellence.

› **Appian’s DCM vision is increased automation.** Appian had a successful public offering in May 2017. A major focus has been partnerships — including 30 top integrators — that continue to drive new business. Appian Cloud is now the preferred deployment option for new customers globally. AWS autoscaling, load balancing, and APIs for partners and end customers to configure DCM instances are all strong drivers. Appian has a broad set of web-based tools to build case applications: Application Designer; Data Type Designer; Decision Designer; Interface Designer; Process Modeler; and Quick Apps, a no-code case management application builder. Since our 2016 Forrester Wave evaluation, Appian’s data designer is the most improved, with an autodiscovery feature that allows users to quickly associate data fields in an external system and an interface design model for RESTful APIs. These tools — combined with the “record type” abstraction — allow data to be easily modeled and brought together at various stages of the case life cycle.

Appian also introduced a dedicated low-code integration designer as well as a technology partnership with Mulesoft for enterprise integrations. The vendor now offers Blue Prism for robotic process automation (RPA) bundled with the Appian platform, broadening its automation footprint. Appian AI Designer, supported by AWS Machine Learning, accelerates the process of building artificial intelligence (AI)-enhanced applications, and Appian plans more packaged AI services in the future. The DCM components are not as out-of-the-box as those of other providers in this evaluation but enable customers to create and define case solutions in a low-code designer. Overall, Appian offers a flexible platform that accelerates programmer productivity with strong cloud options. Enterprises select this provider for mobile and web proficiency, low-code design tools, strong cloud deployment support, and the Appian Records capability to support case-style work patterns.

› **Pegasystems offers omnichannel and solution frameworks.** A cloud-first pivot at Pegasystems is underway. Forrester estimates that 25% of Pegasystems’ revenue is cloud-based, split between its PaaS and managed services and provided directly or through partners. Its price list includes only cloud options and has gotten simpler, with a workbook reduced from 18 to three pages. Pegasystems’ omnichannel focus is clear. It treats email as a first-class citizen and complements it with a chatbot development platform. This provider scored well across the board on AI, omnichannel, mobile, robotics, development and operations (DevOps), and cloud capabilities.

Blue-chip customers that require integration through a library of connectors to create custom services favor Pegasystems. It’s still not the simplest of platforms, however. Configuration environments for streaming data, decisions, task modeling, page layouts, RPA design, and data and integration modeling all benefit from a virtualized data aggregation tier. Still, investing, locating, and retaining skilled Pegasystems programmers is important for successful deployment. The
reviewed product continues to simplify and improve ease of use (e.g., the low-code view and the agile desktop). Pegasystems’ strengths in industry verticals, particularly in CRM and related applications, as well as very capable add-on analytics, give it an edge at the attractive high end of the process market, particularly for omnichannel solutions. Enterprises select Pegasystems for process agility, embedded AI, domain accelerators, and rule-centric apps and when integration strength is a core requirement, particularly for service request use cases.

IBM unifies automation assets under the “workflow” umbrella. IBM continues to win new case management customers and extend solutions within an impressive installed base. Version 5.3.2 continues the Filenet BPM platform and resides on top of the well-proven IBM content assets. Five main components — case builder, client runtime, case analytics, case administrator, and toolkit for integration — have improved, yielding an easier-to-use system. IBM Content Navigator is leveraged to enhance UI features and provide consistency across content and case tasks. This release also includes a case packager that creates case zip files, partial solution deployment to allow case iterations, freeform page layouts, and case team membership. Low-code improvements include integrated case dashboard widgets and Quicktasks, a runtime innovation that allows development of rapid user-driven work efforts, which may become a “freemium” offer in the future.

IBM’s strategy is to combine various automation assets into a unified workflow solution. In the next major release, IBM Case Manager (ICM) will use the IBM Business Process Manager (IBPM) automation engine to provide a single runtime for the full range of workflow patterns. In addition, the current Filenet BPM, low-code elements, content management, RPA (in partnership with Automation Anywhere), and decision automation will consolidate around this core engine. From a cloud perspective, true SaaS is still in the future, but IBM already has a strong managed service offering. Forrester would like to see reduced effort for runtime support and easier integration of external data. Overall, the IBM product is strong on design time capability, has the deepest content solution on the market, and is a fit for businesses looking to automate a variety of operational scenarios.

Newgen Software shows depth in solution accelerators and intelligent apps. Newgen Software is an aggressive provider of intelligent apps, with more than 150 across 17 verticals, including an appeals and grievances solution for health payer services; contract management; and more than 20 financial services solutions. These apps are separately licensed and released under product management control; they include process templates, form fragments, rules, forms, data model, and task templates. With a broader portfolio than many other DCM vendors, this provider includes ECM, BPM, capture, output management, complex event processing (CEP) event model, and mobile development framework.

Newgen Software has partnered with UIPath to build RPA bots and will leverage its own process-mining tool to combine bot-based digital workers with case management. It provides PaaS solutions through business process outsourcing (BPO) and SI partners for finance and accounting. New for 2018 is a refreshed case worker view with an activity stream window, personalized calendar, improved case status graphics, and runtime data model extensions. It also offers
advanced analytics. A digital sensing solution uses text and sentiment analytics against email, Facebook, Twitter, or any content to route case work. A suggestions tab based on historical case activity is a nice addition as well. Enterprises often choose Newgen Software for its geographic diversity, with many installations in the Middle East and Asia Pacific, and its strong product features, quality of consultants, ease of implementation, and lower total cost of ownership.

**Strong Performers Attack The Market From Different Perspectives**

Our Strong Performers are generally well balanced, with differences that stem primarily from company origins (i.e., whether they began life in ECM, BPM, or as solution specialists). Current growth plans and focus in the market serve to further balance providers.

› **Bpm’online takes aim at customer engagement.** This vendor sells its solution primarily in Europe, through 400 partners that specialize in CRM or BPM. With 650 employees, bpm’online has garnered 7,000 clients and penetrated the market in the midsize to large enterprise range. With roots in CRM and classic BPM, it starts with the customer journey to target a consistent experience. CRM and marketing services are familiar domains. For example, deciphering inbound emails to create cases is a common use case. Overall, this is a BPM solution that can build a customer-focused case process, with more than 150 case templates and apps available in an external community. Combined with popular social tools, native chat, and feed functions, and with some roots in unified communication, it offers a nice integration of Skype, customer communications management (CCM), ECM, and traditional dashboard analytics. Clients choose bpm’online as a lighter and low-code alternative to Pegasystems, without the deep analytics and declarative rules engine, for customer service and CRM environments.

› **TIBCO Software introduces a cloud-native DCM platform.** TIBCO Software first launched its Cloud Live Apps in mid-2017 as a cloud-native, multitenant SaaS service delivered as a set of microservices. The vendor updates it monthly, including responsibility for ensuring that the customer application continues to operate. The UX has many low-code elements. It targets the business developer persona — a nontechnical but savvy member of the line of business. The design objective was to be self-discoverable without the need for training. New users are supported by a “create application by interview” wizard with ample applications embedded in the product or available in an online community. The product has less case experience and depth than those of some competitors, but the newly architected platform is a strong example of low-code concepts applied to case management and is worth a look.

› **OpenText's Process Suite adds building blocks and shores up usability.** OpenText has caught up to the field after wrestling with complex road map issues resulting from numerous BPM and DCM acquisitions. OpenText provides Cloud with geographically dispersed and owned data centers. A managed service option is in production at several large government and commercial enterprises. Release 16 adopts a low-code posture through selective exposure of easy-to-use design time features and 13 added case building blocks to speed deployments. Stronger content
integration (e.g., Documentum access and rules enhancement) was evident during our evaluation. New to this Forrester Wave is People Center, a cloud-based application for employee hiring and onboarding. Components that surround the process server add value for customers that need customer communications from the Exstream portfolio or analytics from the Magellan platform. Run time, entity modeling, mobile, packaged layouts, and overall reduced coding, particularly for UI development, are evident. Forrester would like to see less customization in existing accounts to ease upgrade burdens and allow cloud migrations in the future. In addition, Process Suite customers will benefit from easier access to Magellan analytics beyond the business intelligence (BI) that comes with the product. Enterprises most often select OpenText when their direction is to use other OpenText products, such as Content Server, or as an upgrade to existing BPM solutions.

› **Hyland optimizes OnBase by Hyland for content-intensive cases.** The platform’s metadata-driven architecture makes case development straightforward. Case functionality (e.g., entity models, object data, content types and services, UIs, application logic, and workflow routing rules) is defined as metadata in a shared database through the use of configuration tools. The shared metadata model provides smooth interaction, management, and reuse of case design components and facilitates mapping dynamic content and data relationships to the state transitions of a case life cycle. Design and runtime development and mobile features have improved since our 2016 evaluation.6 The vendor has recently enhanced mobile with a point-and-click responsive design tool to augment e-forms and page designers. Future releases will feature a gradual move to microservices to allow autonomy among portfolio assets. Hyland has a mature managed service case offering but doesn’t provide SaaS or PaaS support. Analytics, applied to case guidance, remains a goal for this provider. Enterprises select OnBase for implementation ease and domain knowledge of Hyland and its resellers. This provider targets industries and solutions scenarios where its ECM heritage is its strength, such as healthcare providers and payers, financial services, and higher education, and where the value of low-code attributes of data- and workflow-centric approaches to DCM diminish.

› **DST Systems keeps its focus on health and wealth clients.** DST Systems has industry expertise in asset management, wealth management, retirement, insurance, brokerage and healthcare payer, and pharmaceutical benefit solutions and services. Accelerated deployments, bulked R&D resources, and expanded global partners were among the 2017 focus areas. DST Systems solutions combine case management, content, analytics, and deep domain knowledge. Appeals and grievances for health payers, onboarding for wealth management, and risk and compliance management and reporting are examples. 2018 brings an expanded case framework, cloud improvements with AWS deployment, and a more open approach with other platforms such as Facebook and Google. AWD is a mature managed service offering hosted in DST-owned data centers in the US (Kansas City), UK, and Canada and has the best-in-class security valued by a large financial services and healthcare client base. Reference customers point to lengthy setup times, which may relate to the comprehensive approach of the DST professional services engagements, but quickly confirm the ease of support and reliability that result from
this preparation. Progress for smoother client upgrades from the past is evident. DST Systems remains unique in the DCM landscape in terms of company scale, depth, and focus on security and compliance. Financial services firms that look for reduced cost for managing highly regulated operations and seek improved operational worker support should have DST Systems on their radar.

› **Eccentex provides a flexible PaaS DCM platform.** Fifty percent of Eccentex’s revenue is from hosted DCM solutions that run in Microsoft Azure. It has a direct go-to-market approach as well as strategic partnerships with companies such as Genesys, which uses Eccentex’s DCM for its omnichannel contact center solution. Eccentex Marketplace, with more than 40 prebuilt set vertical and horizontal templates, has a visual drag-and-drop master data modeler and milestone builder to present information at case stages. The model autogenerated form fragments and screen pages for the UI. AppBase DCM has developed the core process components and uses technology partners to round out the platform (e.g., predictive analytics and BI/Al from TIBCO Software and, recently, Kryon for RPA). AppBase DCM uses strong and flexible developer support to configure business rules, pages, forms, and logic using standard languages such as HTML, SQL, and C# or to compile DLLs with Visual Studio. In 2018, Eccentex is focusing on improving documentation, additional preconfigured templates, more integrations with other products, monitoring tools, and stronger data import tools that will move it up the leader board. The company is also evolving from just PaaS to a true managed service solution with a more packaged feel. The low-code approach uses case setup screens, a visual designer for case procedures/tasks, data objects, and pages and forms, and bodes well for an emerging small and medium-size business (SMB) case market. Attractive PaaS and SaaS pricing helps as well, particularly as it includes ECM with capture support and document generation.

**Contenders Focus On Domains Or Market Segments**

Contenders have a strong fit for specific domains, like financial services or government, or focus on midsize market segments. As a result, they lack overall balance across the wide set of product features or haven’t ramped to meet the experience levels of others in the field. Our evaluation reveals one Contender:

› **AINS eCase is a strong case platform capability with domain depth.** AINS has roots in data quality. It focuses on case applications in specialized domains that support the Freedom of Information Act; correspondence management, including congressional mail, policy directives, and complaints; and human resources management. AINS is primarily direct, with over 7% of its revenue still from the public sector, and is building a partner network and growing commercial use cases. eCase presents a capable workflow and case environment. Configurable, drag-and-drop tools build case management applications. The offering includes a data model designer, workflow designer, UI designer, reports designer, role/permissions designer, and collaboration with nicely integrated dashboards, and it works with Microsoft Azure ML for cognitive services. Enhanced mobile app frameworks, stronger integration support, and more packaging to reduce customization would improve the platform. It’s well suited for all levels of FedRAMP and domain-specific use cases where customers can combine horizontal platform capabilities with a fit-to-purpose edge.
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Supplemental Material

**Online Resource**
The online version of Figure 3 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings. Click the link at the beginning of this report on Forrester.com to download the tool.

**Data Sources Used In This Forrester Wave**
Forrester used a combination of three 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 January 12, 2018.
The 11 Providers That Matter Most And How They Stack Up

- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls, where necessary, to gather details of vendor qualifications.

- **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 reference calls with three of each vendor’s current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria for evaluation in this market. From that initial pool of vendors, we 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. Vendors marked as incomplete participants met our defined inclusion criteria but declined to participate or contributed only partially to the 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, please visit [The Forrester Wave™ Methodology Guide](#) on our website.

**Integrity Policy**

We conduct all our research, including Forrester Wave evaluations, in accordance with the **Integrity Policy** posted on our website.

**Survey Methodology**

Forrester’s Q1 2018 Global Cloud-Based Dynamic Case Management Forrester Wave™ Customer Reference Online Survey was fielded to 38 customer references provided to us by the vendors represented in this study.
Forrester fielded the survey from December 2017 to January 2018. The respondent’s incentive included a complimentary copy of this report at the time of publication. Exact sample sizes are provided in this report on a question-by-question basis.

This survey used a group of I&O marketing professionals who are clients of the vendors evaluated in this Wave and is therefore not random. This data is not guaranteed to be representative of the population, and, unless otherwise noted, statistical data is intended to be used for descriptive and not inferential purposes. While nonrandom, the survey is still a valuable tool for understanding where users are today and where the industry is headed.

**Endnotes**


2 Compelling reasons result from extensive domain expertise and preconfiguration for a use case area; for example, legal case management.

3 See the Forrester report “Choosing Between Specialist Solutions And Dynamic Case Management Platforms.”


5 See the Forrester report “The Forrester Wave™: Dynamic Case Management, Q1 2016.”

6 See the Forrester report “The Forrester Wave™: Dynamic Case Management, Q1 2016.”
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