



***ISG** Provider Lens™

2022

Intelligent Automation –
Platforms and Products 2022

imagine your future®

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 800 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data. For more information, visit www.isg-one.com.



Table of Contents

Introduction	4
Quadrant Research.....	5
Quadrants by Region	9
Schedule.....	10
Partial list of companies being invited for the survey	12
Contacts for this study.....	13
ISG Provider Lens™ QCRT Program Description	14
Quality & Consistency Review Team for this study	14

© 2022 Information Services Group, Inc. All rights reserved. Reproduction of this publication in any form without prior permission is strictly prohibited. Information contained in this report is based on the best available and reliable resources. Opinions expressed in this report reflect ISG's judgment at the time of this report and are subject to change without notice. ISG has no liability for omissions, errors or completeness of information in this report. ISG Research™ and ISG Provider Lens™ are trademarks of Information Services Group, Inc.

Introduction

Spurred by the shift to online working and consumption during the pandemic, intelligent automation technologies have been becoming increasingly important to business transformation for enterprises of all sizes. Backed by ever more powerful machine learning algorithms and specialized capabilities such as computer vision, intelligent automation platforms and products are now being applied to areas of business, consumer and employee life never imagined possible a few years ago. These areas include data-intensive processes such as invoicing and export compliance, managing healthcare records and helping consumers apply for a mortgage or loan extension.

Three distinct but increasingly overlapping technologies stand at the forefront of the intelligent automation revolution. Conversational AI platforms, sometimes called chatbots or virtual agents, use natural language processing (NLP) and machine learning to engage in natural or human-like interactions with customers or employees. Intelligent document processing (IDP) uses computer vision and image extraction capabilities to accurately digitize, analyze and automate large volumes of structured and unstructured data from electronic and paper-based forms. Process discovery and task mining consist of a range of tools to help enterprises better understand and optimize their processes and tasks, either from the analysis of log data or the tracking of human actions.

With the market evolving rapidly, enterprise decision makers now have a wide range of intelligent automation products and platforms to choose from. They must consider whether to go for out-of-the-box, on-premises or cloud-based models. They should also determine how different solutions will integrate with existing business processes and automation technologies and consider the ability of different products to meet compliance and regulatory requirements. They must also consider how different solutions support their citizen developer and self-service initiatives, among many other factors.

This ISG Provider Lens™ study aims to help enterprise IT decision makers navigate the fast-changing landscape of intelligent automation platforms and products, providing the following:

- A differentiated positioning of platform/ product providers based on competitive strengths and portfolio attractiveness
- A perspective on different markets, including the U.S., the U.K., Nordics, Germany and Brazil

Our study serves as an important decision-making basis for positioning key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential new engagements.

Quadrant Research

As part of this ISG Provider Lens™ quadrant study, we are introducing the following three quadrants on intelligent automation platforms.

Simplified illustration

Intelligent Automation - Platforms and Products 2022

Conversational AI Platforms

Intelligent Document Processing

Process Discovery and Mining

Source: ISG 2022

Conversational AI Platforms

This quadrant includes software providers that offer conversational AI solutions to foster a development environment and APIs for automated conversational agents. These solutions integrate with chat interfaces such as messaging platforms and social media platforms, allowing third-party extensions and customizations. Conversational AI solutions interact with users through text or voice akin to humans. These applications run on programmable commands and AI technologies and are commonly classified as chatbots and virtual assistants. They represent an efficient way of handling communication with users. For example, they do this by automating standard response and keyword search from a database. They use NLP and machine learning technologies for sentiment analysis, to understand a user's mood, emotions or attitude. These solutions can process increasing volumes of data, including unstructured data, based on search algorithms and data classification approaches.

Within an enterprise's internal environment, conversational AI solutions, by way of virtual assistants, help employees interact with their digital workplaces. In an external customer-facing environment, conversational AI provides chatbots and voice assistants for customer support and marketing initiatives.

Eligibility criteria:

- **Multi-environment deployment capabilities:** Solution designed and deployed by the vendor on-premises or on the cloud
- **Offers solutions in the following formats:** User self-service to create chatbots or virtual assistants with the requisite coding skills, or as a solution, where the vendor or its partners offer consulting service to an enterprise to customize the final product;
- **Supports bots designing for a variety of services:** Solutions that support the creation of chatbots and virtual agents for both customer-facing services or internal services such as HR or IT support
- **Citizen development:** support for no / low-code activities
- **Offers NLP capabilities:** Solutions that have proprietary NLP capabilities or support third-party NLP
- **Support multi-environment input:** Solutions that provide virtual assistants for both text and audio modes
- **Standalone products or solutions:** Solution must be available for purchase or use on a standalone basis, and not be tied to a wider managed service offering.

Intelligent Document Processing

This quadrant focuses on software providers that offer proprietary software products or solutions for the automated discovery, analysis and processing of documents across an organization. Going beyond traditional optical character recognition, IDP software uses AI technologies such as NLP, machine learning, computer vision and deep learning to filter and analyze large volumes of structured and unstructured data from multiple formats, such as email, PDFs, Excel, Word or images for further processing, storage and use in other applications. These tools support the digitalization of the entire document processing workflow across business processes by eliminating the touchpoints that require manual intervention. Such IDP solutions not only aim at enabling companies to reduce costs but also increase workforce productivity, improve accuracy, ensure compliance and enhance customer satisfaction.

Eligibility criteria:

- **Stand-alone products/solutions:** Offer IDP solutions as stand-alone products/solutions for independent licensing to customers in the assessed region
- **Design and development of product/solution:** Offered as either an out-of-the-box solution with pre-built modules or as a custom solution based on client requirements
- **Multi-environment deployment capabilities:** Vendor on-premises or on the cloud
- **Advanced analytics usage:** Ability to offer detailed document analytics, consolidated and secure document gateways, and robust audit and compliance trails
- **Customization and personalization of solutions:** Out-of-the-box APIs, multi-tenancy and secure deployment of platforms; support for low-code / citizen development
- **Demonstrate comprehensive integration capabilities:** Ability to support integration with internal enterprise applications, existing IT infrastructure and third-party automation platforms
- **Technology partnerships:** Established or emerging partnerships with providers of complementary technologies such as conversational AI, RPA, IDP and business intelligence
- **Industry or function-specific solutions:** vertical- and/or function-specific IDP solutions

Process Discovery and Mining

This quadrant focuses on software providers that offer proprietary software platforms, tools and associated services to help clients automatically discover, monitor and improve real-time processes from event logs (usually called process discovery) and user actions to carry out specific tasks (usually referred to as task mining). One of the key reasons preventing companies from realizing ROI on automation is the poor identification of use cases and the inclination to automate processes as is. To gain the benefits of automation, processes must be assessed through multiple lenses with the help of process discovery and task mining technologies. Process discovery is the key to proving automation opportunities and benefits. The use of process mining solutions is aimed at not only eliminating inefficiencies in business operations and paving the way for reduced costs but also improving workforce productivity and enhancing customer experience.

Eligibility criteria:

- **Stand-alone products/solutions:** Offers either process discovery or task mining solutions, or both; offers solutions as stand-alone products or solutions for independent licensing to customers in the assessed region
- **Multi-environment deployment capabilities:** Product designed and deployed by the vendor on-premises or on the cloud
- **Customization and personalization of solutions:** Must be capable of offering out-of-the-box APIs, multi-tenancy and secured deployment of platforms; support for no / low-code activities
- **Demonstrate comprehensive integration capabilities:** Ability to support integration with various enterprise applications
- **Automation opportunity assessment capabilities:** Demonstrate capabilities in opportunity assessment for facilitating automation and strong advisory capabilities
- **Frameworks, methodologies and best practices:** Utilize industry best practices, templates and techniques
- **Technology partnerships:** Established or emerging partnerships with providers of complementary technologies such as conversational AI, RPA, IDP and business intelligence

Quadrants by Region

Quadrant	Global	U.S.	U.K.	Nordics	Germany	Brazil
Conversational AI Platforms	Overview	✓	✓	✓	✓	✓
Intelligent Document Processing	Overview	✓	✓	✓	✓	✓
Process Discovery and Mining	Overview	✓	✓	✓	✓	✓

Schedule

The research phase falls in the period between **June and October 2022**, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in **November 2022**.

Milestones	Beginning	End
Survey phase	June 16, 2022	July 22, 2022
Sneak previews	September 29, 2022	October 28, 2022
Content provisioning	September 29, 2022	October 13, 2022
Press release	November 2022	

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2022 research agenda.

Access to Online Portal

You can view/download the questionnaire at the [ISG website](#) using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

ISG Star of Excellence™ – Call for Nominations

The Star of Excellence is a leading independent recognition of service delivery excellence based on the concept of “Voice of the Customer.” This ISG program collects client feedback regarding service providers’ performance in demonstrating the highest standards of client service, excellence and customer centricity.

The global survey examines services associated with IPL studies, providing ISG analysts with a benchmark for measuring client sentiment and insight into the customer experience. This information complements advisor feedback that IPL leverages in its practitioner-led consulting approach.



Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG will notify both parties. ISG anonymizes all customer data and does not share it with third parties.

To ensure your selected clients complete the feedback for your nominated engagement, please use the Client nomination section on the Star of Excellence [website](#).

Direct any questions or provide comments to star@isg-one.com. This email will be checked daily; please allow up to 24 hours for a reply.

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing work identified by the clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not to produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

Partial list of companies being invited for the survey

Are you on the list, or do you see your company as a relevant provider that is missing from the list?

Please contact us to ensure your active participation in the research phase.

[24]7.ai	Everflow	Nividous
ABBYY	FortressIQ (Automation Anywhere)	Omilia
Acuvate		OneReach.ai
Aivo	Hyland	Openstream
Amelia	Hypatos	OpenText
AntWorks	Hyperscience	PAFnow (Celonis)
Appian	i3systems	Parascript
Apromore	Icaro Tech	Plusoft
Artificial Solutions	Inbenta	Pypestream
Auto. Labs	InBot	qBotica
Automation Anywhere	Indico	QPR Software
AutomationEdge	Infrd	Rezolve.ai
Avaamo	ITyX	Rossum
AWS	Kanverse	SAP Signavio
BIS (Grooper)	Kofax	Senseforth.ai
BusinessOptix	Konica Minolta	Sinch Chatlayer
Celaton	Kore.ai	Singularity Systems
Celonis	Kryon (Nintex)	SMARKIO
Cognigy	Livejourney	Software AG
CPQD	LivePerson	Soroco
Creative Virtual	Logpicker (iGrafx)	Straive
Datamatics	MEHRWERK	UiPath
Druid	Microsoft	UpFlux
eGain	Minit (Microsoft)	ViaCognitiva
Ephesoft	Nama	Visualyze.ai
Epiance	Nintex	WorkFusion

Contacts for this study



Ashwin Gaidhani
Lead Analyst, U.S.



David Pereira
Lead Analyst, Brazil



Mark Purdy
Lead Analyst, U.K. and Nordics



Mukesh Ranjan
Enterprise Context and
Global Overview Analyst



Florian Scheibmayr
Lead Analyst, Germany



Phani KR
Global Project Manager

Do you need any further information?

If you have any questions, please do not hesitate to contact us at ISG.ProviderLens@isg-one.com.

ISG Provider Lens™ QCRT Program Description

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context. In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires
- Advise on service providers' inclusion and participate in briefing calls
- Give their perspectives on service providers' ratings and review report drafts

The ISG Provider Lens™ QCRT program helps round out the research process, supporting comprehensive research-focused studies.

Quality & Consistency Review Team for this study



Wayne Butterfield
Partner, Automation, ISG



Mary Ellen Cutshall
Business Development
Executive, U.S.



Jeff Augustin
Partner, ISG



Paul Schreiner
Partner, Insurance, U.S.



Scott Furlong
Partner, ISG

Do you need any further information?

If you have any questions, please do not hesitate to contact us at isglens@isg-one.com.