# BPM Automation – Landscape, Trends & Industry Adoption

Shaan Panda on key trends seen across BPM automation based on market assessment and customer conversations.

Business Process Management (BPM) is one of the key focus areas for organisations embarking on their automation journey. BPM Automation has gained the larger space in terms of the overall Digital Process Automation (DPA) market, and it is estimated to grow from $6B to $14B in the next five years.

The current pandemic has disrupted most enterprise software strategies and a shift in the way we work. Demands are growing for new applications to track people, tests, and assets, administer new programs, coordinate with employees, and fix broken business processes. This increases the need and demand for organisations, irrespective of size to think differently and adopt technology that can solve larger business problems. BPM is one such technology area that can enable organisations in such scenarios.

The need for BPM has created a huge opportunity to service integrators to
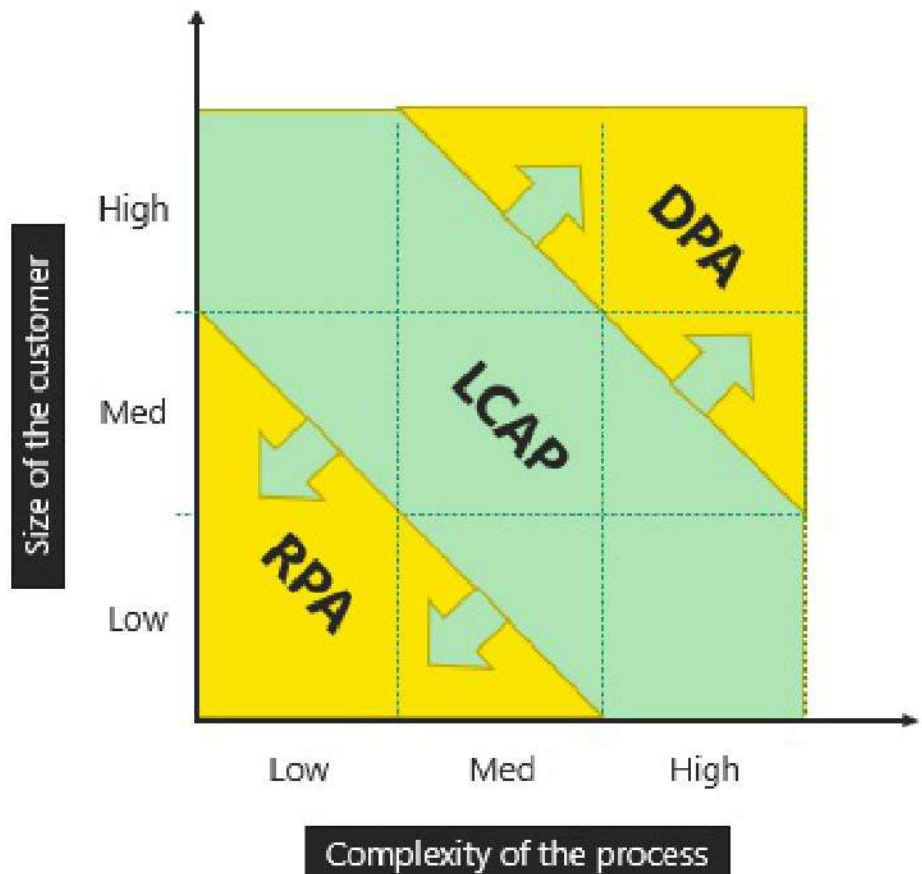

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High end customers opt for complex processes.

provide BPM automation services. These providers typically categorise their services of increasing maturity and size across three broad areas:

1. Technology implementation: Providers

support process discovery, modelling and implementation of DPA technology (e.g., DPA/RPA tools and more.)

2. Customer experience: Providers specialise in creating digital/physical
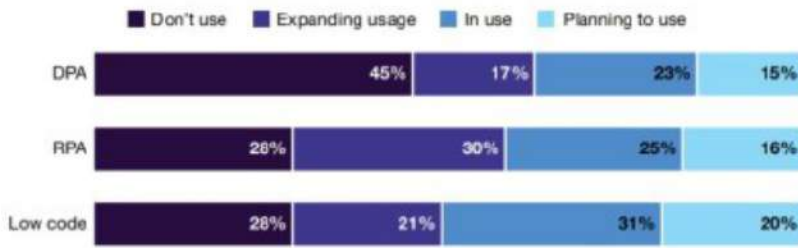
Base: 156 business technology decision makers
Source: Forrester's Q1 2020 Global Digital Process Automation Survey

Key trends seen across BPM automation.

experiences for clients leveraging tech that directly support such experience (e.g., conversational interfaces and more.)

3. Business transformation: Providers redesign business models working with senior client executives and include tech and CX efforts.

Large IT service providers (>$1B) have deep partnerships with multiple industry leading tools across different verticals and offer end-to-end automation solutions. Mid-tier IT ($500M - $1B) service firms focus on partnering with leading tools with AI-powered solutions. Small IT firms (>$500M) focus typically on 1-3 verticals with generic business consulting and tech implementation.

Though the service providers look at three broader offerings, we see the market segmented across three key technologies:
1. DPA (for BPM automation): Enable Pro-developers to quickly automate processes of high complexity, e.g., Appian, PEGA, IBM-BPM and more.
2. RPA (for task automation): Enable citizen developers to quickly automate tasks/processes of simple complexity, e.g., UiPath, Automation Anywhere, Blue Prism, etc.
3. Low code (for low code/no code app dev): Enable Pro-developers/Citizen developers to automate moderate to high complexity processes, e.g., Microsoft Power platform, Salesforce and more.

Traditionally RPA tools are the best for automating tasks and simple processes for low/medium complex processes, while DPA tools are used to automate

end-to-end large complex processes. Lately, LCAP tools wedged between RPA and DPA tools are gain traction extending their capabilities in RPA and BPM space with powerful low code features.

In terms of market adoption, we look at RPA tools at the highest adoption maturity. Companies look at implementing PoCs to automate their standard back-end automation tasks across support functions - Finance, IT and HR.

LCAP tools play a significant role in automation of medium tasks through low code platforms. Companies are looking at faster implementation cycles to realise benefits; we also see many RPA tool capabilities available in LCAP tools.

DPA automation is slowly picking up as companies who are slightly higher on the automation maturity curve look to make larger investments in automating end-to-end business processes where we see human/manual intervention. In these scenarios, we combine AI along with workflow automation to provide a compact end-to-end solution for customers.

Market adoption of BPM segments
The key trends we see across BPM automation based on our market assessment and customer conversations:
a. Microsoft and Salesforce have the most comprehensive products and strategies in the BPM automation tools compared to the RPA, DPA and other low code platforms.

b. Low code development is the preferred method for configuring, customising SaaS applications as well as building and deploying custom applications.

c. Low code platforms are elbowing out DPA/RPA tools and aim to build capabilities amongst professional developers to create general applications faster and to meet business needs.

d. DPA vendors are now investing in low-code interfaces to ensure faster development cycles. However, their pricing and packaging strategies, typically geared for high margin sales, are limiting client adoption.

e. BPM automation's pricing models are typically opaque that customers dislike. There is a need to simplify as well as provide fair and transparent pricing.

There is a lot of potential in this space. Process plays a crucial role in the heart of digital transformation. Companies need to start addressing strategy, technology and user experience requirements and thus carefully evaluate the right professional services partner to become successful. To select the right provider, they need to identify the right segments/automation areas, make process optimisation a priority and determine the role of business (citizen developers) and professional developers.

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