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Adobe Wows Customers In Document-Centric BPMS Processes

The Forrester Wave™ Vendor Summary, Q3 2007

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EXECUTIVE SUMMARY

Adobe's strength in BPM is where content moves between the customer and the business to support customer engagement processes, such as customer service and new accounts. Adobe totally gets it. Processes like "account opening" continue to plague businesses and their customers, especially in a multichannel world in which customers are faced with many interaction choices such as email, telephone, a Web site, or face-to-face interaction. Adobe's vision is to provide the best tools for building improved customer experiences leveraging BPM, PDF, forms, and rich user interfaces — no matter how the customer chooses to interact. Adobe's vision of linking the customer experience and rich content tools to a full BPM capability is a clear winner.

ADOBE TACKLES THE EDGE OF THE PROCESS BY EASING CUSTOMER INTERACTIONS

Adobe, a company perhaps best known for its PDF technology but also a specialist in creative tools, entered the BPM market through a workflow acquisition in 2002 and a BPM acquisition two years later. Adobe's purchases that now make up LiveCycle include Accelio for e-forms design and workflow (acquired in 2002), and Q-Link for workflow/BPM features (acquired in 2004). While the company could have used these tools and its significant resources to create a typical competitive BPM suite, Adobe's product managers had a different vision. In fact, Adobe's BPM vision is part of the company's overall vision for its enterprise products — focus like a laser beam on customer engagement by bringing together a rich palette of content, collaboration, application development, and process tools.

Today's LiveCycle suite of products, including LiveCycle Workbench ES, the suite of LiveCycle services and LiveCycle Designer, allows buyers to build extremely rich online or offline customer interactions in the context of business processes. By rich, we mean both in functionality and also taking advantage of rich Internet applications through Flash and other Adobe tools (beyond the LiveCycle brand). The suite includes many easy-to-use tools for quickly developing these interactions; one example is a wizard, called Guide Builder, that creates Flash-based interfaces, called Form Guides, that guide users through filling out a form — which can then be downloaded or printed as a PDF complete with 2-D bar code.

In marked contrast to big competitors EMC and IBM, Adobe does not have a native content repository or image capture. One reason why is that Adobe products are used by many content vendors, and Adobe does not want to be in a head-to-head competitive battle with the content repository vendors. Instead, Adobe works with third parties to provide content capabilities; in fact, it partners with several of the other vendors in this Forrester Wave evaluation that have content management heritage. Adobe is somewhat partner-agnostic and has integration experience with many content and capture providers.

Forrester evaluated Adobe's current offering and strategy for document-centric business process management against approximately 150 criteria (see Figure 1). Overall, the product has strong user interfaces and developer tools, but it lacks native content management capabilities. This means that the product is an especially good fit for buyers who:

- **Need outstanding customer experience around document-intensive processes.** Any company tackling account opening or any other process that requires customers to fill out a lot of documents should not pass over Adobe for consideration.¹ Integration of many of Adobe's technologies, from Flash to Acrobat Connect (formerly Macromedia Breeze), allows both customers and the Adobe user inside the enterprise to interact with documents and see the changes at the same time. With Adobe's rich tool set for customer engagement, Adobe has an extremely strong offering for customer support and enhancing the customer experience.²
- **Already use Adobe for e-forms or policy management.** Adobe's strong features for policy management around documents and forms are now integrated into one LiveCycle server product, making administration and licensing much easier. Adobe also has a strong focus on BPM for forms-based processes, making Adobe a natural choice for BPM in this use case.³
- **Are looking to replace document imaging with e-forms.** Some companies that implemented document imaging systems for transactional processes are now looking to implement next generation systems that eliminate imaging altogether. For example, a spokesperson from a local government in Illinois spoke at Adobe's analyst day about that organization's shift from imaging to an e-forms-based system that significantly reduced the cycle time for restraining orders to be approved — not only saving time but also potentially saving lives. Companies thinking about moving from document imaging to an e-forms-based process should take a good look at Adobe's BPM product in addition to its e-forms.

To see how Adobe stacks up against seven other competitors, see the Forrester Wave™ evaluation of the document-centric business process management suites market.⁴

Figure 1 Adobe LiveCycle Evaluation Overview

CURRENT OFFERING	
Design	Adobe LiveCycle Workbench ES provides Eclipse-based development tools, extended through the component architecture, with BPMN support.
Development environment	Adobe has a strong development model that is easy to use for developers.
Capture and image repository support	Adobe LiveCycle ES includes integration for leading ECM systems like Documentum and FileNet Content Services.
Document-centric application support	Many of the applications listed below skew toward business processes in the financial services and insurance markets. Adobe LiveCycle customers include other applications in target verticals like manufacturing, life sciences, government and healthcare. The document-intensive processes range from product life-cycle management to clinical trials to patient registration and much more. Transaction volumes in these applications range from hundreds to thousands of documents per day.
Automation	Adobe LiveCycle ES can automate all processes built by the modeling tool.
Workflow	Adobe LiveCycle ES supports the interaction of people and automated processes.
Monitoring and management	Yes to all. Adobe LiveCycle ES can store and reference these directories.
Product architecture	Product's runtime integration environment has high performance, reliability, and scalability; it provides localization.
STRATEGY	
Product strategy	Adobe has a clear strategy to focus on the "engagement gap" between companies and external entities, whether customers or partners.
Corporate strategy	Adobe is a large, profitable company, though not the largest in this evaluation. It has diversified product lines, and untapped synergies exist between LiveCycle and some of its other products.
Product cost	While Adobe did not disclose its average sale price, Forrester expects this solution to be less expensive than those from the full-suite ECM providers.

Source: Forrester Research, Inc.

Figure 1 Adobe LiveCycle Evaluation Overview (Cont.)

MARKET PRESENCE	
Installed base	Adobe has more than 1,500 LiveCycle customers.
Revenue	2006 year-end financial revenue was \$2.575 billion.
Revenue growth	Revenue growth was approximately 31% for fiscal year 2006. This includes revenue from the acquisition of Macromedia.
Systems integrators	Adobe has more than 60 system integrators (SIs) worldwide. A specific list of partners can be found on the Adobe Web site. [Note: Forrester estimates that Adobe has more than 20 SIs who have completed three or more LiveCycle deployments in the past 18 months on a worldwide basis.]
Services	Adobe Consulting offers education, consulting, and support services, having approximately 250 engineers for implementation services (this does not include SIs and partners).
Employees	Adobe has approximately 6,100 employees, with 250 engineers dedicated to LiveCycle and 250 direct sales reps for selling server products.
Technology partners	Adobe has strong partnerships with SAP and EMC, as well as a good network of SIs.

Source: Forrester Research, Inc.



Go online to download additional in-depth data and scores for this vendor and other vendors included in this Forrester Wave evaluation.

SUPPLEMENTAL MATERIAL

Online Resource

The underlying spreadsheet for Figure 1 is available online. The spreadsheet includes more detailed data and scores for this vendor.

This detailed data and scores for this vendor are also available online through an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then 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.

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 document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and readers are encouraged 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.

ENDNOTES

- ¹ On March 26, 2007, Craig Le Clair posted a blog entry on Forrester’s “From Information To Knowledge Management” blog entitled, “Take Account Opening. Please.” In this entry, Craig describes some of the pains around the account opening processes that plague many financial services firms. (http://blogs.forrester.com/information_management/2007/03/often_when_i_or.html)
- ² Forrester evaluated six leading hosted Web conferencing solutions across 108 criteria in mid-2006. Adobe was a Leader in this evaluation. See the June 6, 2006, “[Adobe Breeze Tops The Web Conferencing Field In Flexibility](#)” report and see the June 6, 2006, “[The Forrester Wave™: Web Conferencing, Q2 2006](#)” report.
- ³ Forrester evaluated five e-forms software vendors across approximately 100 criteria and found that Adobe and IBM are the clear market Leaders. See the June 16, 2006, “[Adobe LiveCycle: An e-Forms Leader Combining Strong Forms Design With Ubiquitous Access](#)” and the June 16, 2006, “[The Forrester Wave™: e-Forms Software, Q2 2006](#)”.
- ⁴ To see how the vendors stack up, Forrester evaluated eight business process management suite (BPMS) suppliers best suited and most experienced for document-intensive processes across approximately 150 criteria. The result? IBM, Global 360, EMC, and Adobe lead; IBM leads with substantial market presence and a comprehensive offering; and Global 360 leads with strong design, automation, and workflow capability. Adobe leads with exceptional development tools for rich Internet applications (RIAs) and vision for customer engagement. EMC leads with excellent native capture, content integration, and a very strong BPM offering. Open Text and Hyland Software are Strong Performers with excellent experience, but they require improved process definition, simulation, optimization, monitoring, and management. Autonomy Cardiff has strong content extraction, workflow, monitoring, and management capabilities, but it needs more experience in document-intensive applications. And Captaris — while lacking a strong overall offering — is a Contender, with a significant upside for integrating forms, fax, and paper content. See the July 9, 2007, “[The Forrester Wave™: Business Process Management for Document Processes, Q3 2007](#)” report.