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Lombardi Leads With An All-Around Powerhouse Human-Centric BPMS

The Forrester Wave™ Vendor Summary, Q3 2007

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EXECUTIVE SUMMARY

Lombardi Software, an Austin, Texas-based business process management suite (BPMS) vendor, is a Leader in the human-centric BPMS market. Teamworks, Lombardi's BPM suite, features top-notch collaboration tools, Microsoft Office integration, user-friendly modeling tools, and simulation capabilities. The product makes modeling easy for business users for two reasons: 1) The modeling environment hides technical details and has "heat maps" to simulate how the process will work, and 2) simulation capabilities and software "coaches" make it easy for business analysts to determine how best to design processes. Blueprint, an innovative, high-level modeling product, gives business analysts a user-friendly, low-cost, but powerful requirements-gathering tool for uncovering "as is" and "to be" processes when interviewing process participants. The combination packs a powerful punch, giving Lombardi a powerhouse product in the BPM space.

LOMBARDI IS A TRULY VISIONARY HUMAN-CENTRIC BPMS VENDOR

Lombardi is a pure-play BPMS vendor based out of Austin, Texas, with a substantial clientele of Fortune 500 companies. Though relatively small (Lombardi is in the middle of the pack for this evaluation in terms of number of customers and revenue), it is a true Leader for its innovation around process design, optimization, and collaboration. Lombardi has really put its money where its mouth is and has spent the past year and a half since our last evaluation beefing up its product portfolio — despite its comfortable status as a Leader at the time.

The Blueprint product, a new software-as-a-service environment that enables business users to do rapid process discovery and modeling, is Web-based and uses AJAX technology. This is integrated with the Teamworks BPM suite's modeling tools via the relatively new BPDM standard, but Blueprint is sold separately for a per-user fee and can be used by itself. The use of BPDM means, in theory, that Blueprint could target another vendor's BPMS, too, but Lombardi is one of the only vendors to support this standard so far.

Once models are moved into the Eclipse-based Teamworks tools, simulation and optimization capabilities further enhance the product's ease-of-use business case: The simulation environment is integrated with the modeler and allows users to simulate both real business data and hypothetical business data; streamlining recommendations are proactively provided and can include SLA performance metrics. Lombardi's extensive use of "heat maps" and other highly visual analytic aids in the simulation/optimization environment is a real differentiator. SLAs can also trigger more complex actions that resolve problems proactively in the process.

Collaborative development is another major differentiator in Lombardi's BPMS: Both design and runtime collaboration tools are provided that really set this product apart from its competitors. A process modeled in the Blueprint engine can be saved and accessed by a business analyst or developer in the Teamworks environment — the Teamworks user will have access to all of the components of the process (through import). A business analyst in the Teamworks environment can modify the process and publish it back to the Blueprint environment and user. Multiple business users may edit a model in Blueprint at the same time, and changes replicate in real time across all the users' browsers.

But collaboration features aren't limited to design time: Lombardi offers a separate product in Lombardi for Office that lets developers integrate Microsoft collaboration tools into processes. Integration to SharePoint allows for new sites for case management to be set up from within a process, or for processes to be kicked off against a particular document or discussion. Users can view and complete tasks within Microsoft Outlook. An open source wiki, chat, and online presence mechanisms round out Lombardi's collaboration-enabled process vision.

Forrester evaluated Lombardi's current offering and strategy for human-centric BPMS against approximately 150 criteria (see Figure 1). Overall, Teamworks has strong modeling, simulation, and collaboration tools, but it lacks installations with extremely high transaction volumes and the international market presence that the larger vendors in this evaluation have. This means that the product is an especially good fit for buyers that:

- **Value easy-to-use, very powerful modeling and design environment tools.** Among other things, the product's process modeling tools — from Blueprint for business users to Teamworks for business analysts and developers — are configurable, well laid-out (and well thought-out), hide technical details, and allow collaboration across environments in a way that maximizes on the collaboration between business analysts and application developers. Furthermore, Lombardi has unique features for advanced process analysis through data-driven simulation that aren't matched anywhere else by any other vendor.
- **See collaborative development as an integral part of a BPMS.** While many products we evaluated offer collaboration capabilities, few are so comprehensive in both the design and runtime environments as Lombardi's is. Blueprint enables end users to perform real-time, collaborative process discovery in ways no other vendor can support, and to top it off, the results can be pulled into the execution environment.
- **Want top-notch service from sales, services, and training.** Lombardi customers we talked with all agree that Lombardi has truly excelled in responding to customer concerns and questions, both prior to and post implementation. The company has an extremely professional staff and excellent management that outmatches its small size; it's impossible to find a single dissatisfied customer.

To see how Lombardi stacks up against 11 other competitors, see the Forrester Wave™ evaluation of the human-centric BPMS for Java platforms market.¹

Figure 1 Lombardi Teamworks Evaluation Overview

CURRENT OFFERING	
Modeling	Lombardi has top-notch modeling tools that include advanced features like data-driven simulation and organizational charting.
Process solution	Lombardi provides above-average process solution functionality, with easy to use and intuitive development tools, as well as complete transaction support.
Process execution	The product's execution is strong, although the integration doesn't match those vendors with an integration-centric focus, and some rules features are missing.
Monitoring and management	The product has excellent monitoring features and few limits on change management, although process models cannot be granularly modified at runtime.
Product architecture	A good product architecture allows a broad choice of OS and database choices.
STRATEGY	
Product strategy	Lombardi continues its category leadership in product strategy with a consistently visionary product road map.
Corporate strategy	Lombardi is small, private, and growing rapidly. The company is good at self-promotion, especially for its size.
Process expertise	Lombardi has participated in the development of BPMM and receives rave reviews from references on its implementation skills.
Product cost	Lombardi is among the more expensive offerings in this space, but buyers choose it due to enhanced features in areas like analytics.

Source: Forrester Research, Inc.

Figure 1 Lombardi Teamworks Evaluation Overview (Cont.)

MARKET PRESENCE	
Installed base	Lombardi's midsize installed base includes several marquee names.
Revenue	As a privately held company, Lombardi does not disclose financial information. Using Forrester's scoring model, it is estimated to be in the range of \$30 million to \$99 million.
Revenue growth	Lombardi's overall sales growth from 2005 to 2006 was 171%.
Systems integrators	Nine integrators have completed three or more deployments in the past 18 months: Akubra, Athens Group, BearingPoint, BusinessEdge Solutions, Gordian Transformation Partners, MISI, Satyam Computer Services, and SHS Polar (Spain).
Services	Lombardi has 51 professional services engineers and 12 technical support staff.
Employees	Lombardi has 152 total employees with 51 developers total.
Technology partners	Lombardi has strong partnerships for resellers and license partners.

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 Forrester evaluated leading human-centric business process management suite (BPMS) vendors across approximately 150 criteria and found that Appian, Lombardi Software, Pegasystems, and Savvion lead on the strength of their people-oriented products and excellent monitoring and analysis tools. Software AG and TIBCO are also human-centric BPM Leaders, thanks to their all-around strength and integration prowess. BEA, Fujitsu, Graham Technology, and HandySoft are Strong Performers but lack either breadth of product or vision, while IBM is a Strong Performer that has some missing features but an extremely strong future. Finally, Contender Intalio brings an open source offering to the market that could win over buyers with its low cost. See the August 2, 2007, “[The Forrester Wave™: Human-Centric BPM For Java Platforms](#)” report.