

A background image of a business meeting with several people in an office setting, overlaid with a semi-transparent dark filter. The text is centered over this image.

# EVALUATING BPM/RAD PLATFORMS FOR SHAREPOINT

PART 1: Preliminary market analysis

# T ABLE OF CONTENTS

00 Introduction.....	p.3
01 Promises.....	p.5
02 Website Research.....	p.7
03 Direct Contact With Vendor.....	p.9
04 Direct Contact With Existing Clients.....	p.11
05 Advisory Company.....	p.13

# 00 INTRODUCTION

SharePoint evolves constantly. In every new version, new functionalities are introduced and used by organizations all over the world. Microsoft's platform can serve multiple purposes – as intranet, collaboration tool, business intelligence, CMS or document storage environment.

Several years ago, idea to use SharePoint as a primary application platform serving as an organization's process backbone, was far too bold for most companies. And so, many of us had used SharePoint to implement only simple workflows and forms responding to non-relevant or minor business needs.

Nowadays, workflows and forms became virtually inseparable. Accompanied by business rule engines and capable integration frameworks, they create flexible business application platforms. This way, SharePoint can be transformed into an environment suited for responding to company-specific, business-critical requirements. Called either Rapid Application Development (RAD) environments, Business Process Management Systems (BPMS/iBPMS) or low-code solutions for SharePoint, these platforms allow companies to step into the realm of true Business Process Management (BPM).

With a number of quality solutions available on the market, deciding on a suitable iBPMS tool is quite a challenge. How to choose the right platform for the now, which won't limit your organization in the future? How to see through the marketing jargon when most solutions are making similar promises? Is it just comparing apples to apples? Actually, it's not that simple.

This e-book presents research methods to select the top 3-5 vendors from dozens available on the market. It's divided in two parts. The first presents the quick-scan method for a cursory research. In the next part, you will find out how to perform an in-depth technical evaluation, and select the right vendor specifically for your organization.

# 01 PROMISES

There are 6 most commonly presented promises of RAD/BPM platforms:

## 1 LOW CODE/NO CODE

Ability to deliver business applications with little, or no hard coding (e.g. .NET). Usually, it means that power users work with building blocks and soft code (e.g. business rules)

## 2 QUICKNESS OF DELIVERY

Implementing more business applications in the same time span, compared to SharePoint out-of-the-box features, and/or hard coding

## 3 FLEXIBILITY

The ability to adapt to specific business needs, regardless of industry, region or size

## **4 EASY INTEGRATION**

Pre-built, low-code or no-code connectors to external systems, to ensure two-way integration (fetching and inserting data)

## **5 END-TO-END PROCESS HANDLING**

The ability to deliver complex, cross-departmental processes

## **6 HIGH USER ADOPTION**

“user-friendliness” of the solution; no or little user training is required – for both end-users and power-users.

Many vendors step up with identical claims, but the platforms are far from identical. There are simple systems suitable only for departmental workflows (shadow IT), and there are full-fledged platforms ready for enterprise-grade implementations. Or, there are platforms, which use either the native SharePoint workflow engine, or a proprietary one

All in all, there are plenty of factors to compare and evaluate, before making a final decision, and that is why it is important to verify the vendors' promises. But it is even more important to know what vendors are not telling. And this series will discuss the both aspects.

The task list starts with narrowing down the list of potential platform solutions using a quick-scan method. Please note it works best when at least 2-3 of the steps are combined.

# 02 WEBSITE RESEARCH

As obvious as it may seem, browsing the internet can actually help establish the background for your vendor search. Especially when you know what to look for. Ask yourself what the vendor's website really contains, and what is missing.

Take a closer look at the following:

## **CONCRETE INFORMATION**

If you have a feeling that behind all marketing jargon there is no single technical information, that is the first warning sign. Perhaps behind the smooth façade, there is little to write about?

## **SCREENSHOTS & VIDEOS**

If the only thing the website offers is stock images of business people and/or cartoon-ish images, be aware. Only the actual screenshots and videos presenting the system will allow you a first glance at the user interface, and consequently, assessing its attractiveness.

### INFORMATION ABOUT CLIENTS/PARTNERS

a visible list of clients and partners builds credibility. Also, it ensures that the vendor you are evaluating is a business partner that is here to stay. Otherwise, you'll be taking a huge leap of faith with your money.

### TRIAL/FREEMIUM VERSION

if the vendor doesn't offer one, this may indicate that the system is overly complicated, despite all claims and hopes. After all, it is always wise to have a test drive first, right?

### PROS & CONS OF THE METHOD:

- + The quickest & most efficient way to access the information
- + Perfect for initial screening
- + Clears the path for quality offers
- Many vendors promise the same which makes direct comparison difficult
- Hard to evaluate the relative concepts, such as "swift", "good value for money"
- Innovative solutions are hard to find as search engines promote the vendors with the longest history and largest marketing investments



## 03 DIRECT CONTACT WITH VENDOR

Contacting a BPMS vendor, or its partner, directly may provide the general "feel" of the company, its level of expertise, industry knowledge and customer service. This way you can also find out whether the vendor's representative will tell you all you want to hear, or act as an actual advisor, even despite a misalignment of the initial vision. After all, you want a business partner on whose expertise you will be able to rely, right?

Observe the following:

### **RESPONSE AND RESPONSIVENESS**

this includes the time, but also the quality of feedback, especially in terms of technical details and the quality of reply

### **CONSISTENCY OF INFORMATION**

check if what you're told is aligned with what you've already found on the website. This is the time to ask directly and to get more in-depth information, so share the pain points and don't hold back the tricky questions.

### **PROS & CONS OF THE METHOD:**

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>+ Provides more detailed information</li> <li>+ Tests the mutual “chemistry” between you and the vendor; builds trust and confidence</li> </ul> | <ul style="list-style-type: none"> <li>- Not the best for comparing technologies used</li> <li>- If you speak with only sales representatives, concrete information may still be hard to come by</li> </ul> |
|--|---|

# 04 DIRECT CONTACT WITH EXISTING CLIENTS

Having an insight from somebody that already cooperated with the vendor is always a good idea. Apart from questions about the quality and functionality of the platform itself, you can survey the overall usability of the platform and the client's satisfaction level. More importantly, any lessons learned from the project might prove invaluable and significantly add to the general picture of the vendor and his solution.

To obtain the most accurate feedback, it's best to choose a business that is similar to yours in at least a few key aspects, such as size, industry, and challenges that were a subject to solve by RAD/BPM platform. Usually, such contact will be arranged by the vendor, but we recommend you don't stop here.

Pick two or three clients (not necessarily similar to your company) and simply initiate direct contact to get unbiased feedback. It may seem hard without a middle man, but it is worth the trouble. At one point, all the buyers were in the same position.

#### **PROS & CONS OF THE METHOD:**

- + First-hand feedback on the system, the vendor and the cooperation experience
- + Behind-the-scenes information
- + Valuable lessons learned, including a time perspective overview of maintenance and change management
- Other clients may have been driven by different criteria/different needs
- Information may be biased
- Information may be out-of-date, project participants may be hard to contact

# 05 ADVISORY COMPANY

If you want to skip the trouble of doing market research, you might consider taking advantage of services provided by an IT advisory company, e.g. Gartner or Forrester. Their professionals keep a close eye on the latest trends and publish a variety of articles and reports that provide insights about the market.

The reports evaluating vendors and their systems are helpful when it comes to a preliminary research. There, you will find information about their suitability, performance, as well as pros and cons.

However, please note that some of the report criteria may not apply strictly to the quality of product. Report inclusion criteria take into consideration the market presence of the vendor, marketing strategy, geographical spread of the income, etc. Hence in many cases vendors that focus, e.g. on just one continent, will simply be omitted in the reports – to your disadvantage.

Besides broadening your knowledge, the advisory companies also offer direct consultancy and vendor research services. Based on your requirements, they will comb the RAD/BPMS market and come back to you with proposed solutions. It may save a lot of time and trouble, but requires a financial investment as well.

#### PROS & CONS OF THE METHOD:

- |   |  |
|---|--|
| <ul style="list-style-type: none"> <li>+ Minor involvement on the buyer's side</li> <li>+ Comprehensive approach: articles, vendor reports, consultation available</li> <li>+ Increased security of investment</li> </ul> | <ul style="list-style-type: none"> <li>- Some report criteria apply to other aspects than just the quality or suitability of the product</li> <li>- Due to criteria that may be irrelevant to your company, many companies may be omitted in the reports</li> <li>- The “report stars” may not guarantee the best client experience</li> </ul> |
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Preliminary screening of the RAD/BPM vendors saves time and effort, as it prepares the ground for in-depth technology evaluation. Despite the time required for doing it right, it is worth it. The platform you choose will influence the future of your SharePoint environment, and the capability of delivering business applications to quickly respond to the ever-changing business requirements.

After initial sifting through the prospect vendors, comes the time for a more in-depth analysis. In part 2 of the e-book, you can read about the five methods, which allow delving deeper into the Business Process Management Systems assessment.



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Michal is a consultant and business development manager at WEBCON. He's mainly responsible for the international growth of the company through building partnership channel in the EMEA region.

Michal's professional interest revolves around user experience, user adoption and Business Process Management, which resulted in publishing multiple articles in magazines and internet portals. He focuses on practical approach, combined with the ease of use.