# Magic Quadrant for Business Process Analysis Tools, 2H07-1H08

**Business process analysis tools continue to grow in importance as business managers, process architects and process analysts seek to better understand, streamline and automate their business processes, and communicate their needs to IT professionals.**

## WHAT YOU NEED TO KNOW

Business process analysis (BPA) tools are key components of business process (BP) improvement and BP management (BPM) initiatives. Process modeling is a key capability of a BPM suite (BPMS). In this capacity, BPA tools complement BPMS tools by enabling deeper, multilevel modeling (conceptual, logical and physical in greater detail and relationship mapping) than the modeling component of a BPMS.

BPA tools are primarily intended for use by BP architects, who are responsible for redesigning business processes at a conceptual level, and BP analysts, who redesign processes at a more detailed level and are responsible for coordinating the implementation of the new processes as part of BPM projects, IT development projects or package purchase acquisitions. Although these two roles increasingly are being staffed in end-user business units, in many organizations, IT analysts fill these roles today. BPA tools can be used by other roles in the organization as well – for example, business users and data, enterprise and technical architects looking to understand business processes in the context of their disciplines.

More specifically, BPA tools enable BP architects to document, analyze and streamline complex processes, thereby allowing business areas to become more agile and effective. BP analysts, in turn, redesign BP models and refine them to a more detailed level to ensure the processes are properly communicated to those implementing them through development, package purchase or applications hosted by partners or third parties. Gartner sees an increasing interest by IT organizations wanting to better understand how the business processes relate to, and are designed and implemented in, service-oriented architectures (SOAs). Also, IT organizations show increasing interest to have better integration across roles through the use of integrated or best-in-breed suites of tools which support modeling for business process, object-oriented and data/database analysis and design and requirements management. As a best practice, organizations are defining business processes, events and workflows in BPA tools and bridging this information into IT modeling tools and BPMSs where more-detailed software and data service analysis, design and development occurs.

BPA is also becoming a starting point for BPM projects and compliance activities. Linkage to the workflow assembly and orchestration engines and business activity monitoring (BAM) tools is driving BPA into the mainstream for BP improvement initiatives. Understanding complex business processes is a significant challenge. The assistance of a tool with visualization and other features – such as simulation and activity-based costing (ABC) – helps to optimize business processes and realize BPM cost and time savings. BPA tools help define the business architecture portion

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of the enterprise architecture. Many BPA tools can also be used by technical, application and data architects to define the technical and information architectures. And, because most BPA tools have a shared repository for these models, it is possible to do change impact analysis across organizations and roles based on the inter-relationships of their models. Still, BPA tools are primarily focused on the BP architect and analyst roles.

BPA tools are not only bought from a "top-down" perspective of BP improvement, the majority of customers who initiate BPM projects in a "bottom-up" manner (that is, first focus on implementing a BPMS tool to improve a human-to-human process) add a BPA tool within 12 to 18 months thereafter. BPA tools enable the architects and analysts to diagram their processes, noting (generally abstracted) rules or specifications to promote understanding and to validate this information using standard methodologies and best practices enabled by the software. Ideally, organizations use the knowledge captured in these BPA tools to automate the models into deployable applications that leverage the analytical efforts and ensure compliance of the execution environment with the BP rules. Generally, this is accomplished via bridges from the BPA tools to other BPM or IT development technologies.

## What has been the growth rate for BPA tools during the past three to four years?
Based on Gartner revenue estimates, the market revenue has consistently grown an average of 15% during the past several years and sits at approximately $400 million in new product license and maintenance revenue. A large follow-on market also exists for consulting and services in implementing these tools and the methods to use them. When calculating the $400 million BPA market revenue, we did not include any consulting or service revenue – including those related to product implementation.

## What is their projected growth during the next few years?
Expanding demand for BP modeling tools will result in at least a 10% compound annual growth rate in market revenue through 2010 (0.8 probability). Growth rates for the BPA leaders – that provide more return on investment because of functional and service differentiation – and offerings from successful specialty/niche vendors will continue to be at the 15% rate. However, the number of BPA users will grow at significantly faster rates than BPA market revenue because BPM vendors offer low-cost modeling extensions to their tools. This will create greater

**Figure 1.**
**Magic Quadrant for Business Process Analysis Tools, 2H07-1H08**



Source: Gartner

As of June 2007
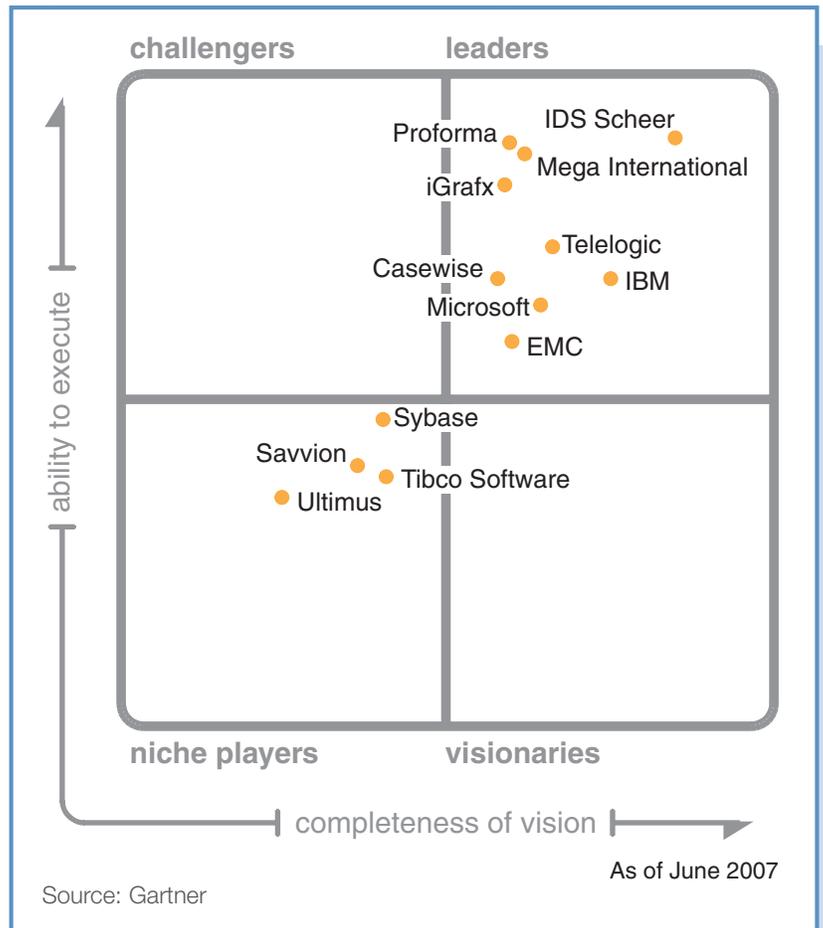
opportunities for selling increased BPA consulting services and open up more cross-product marketing to vendors with multiple tool offerings as part of their BPMSs.

## Do you expect the BPA market to disappear at some point because of the vendor consolidations and emergence of BPMSs? If so, when do you expect that to happen?
We do not see the BPA market disappearing even in the long term (that is, through at least 2012) – although market consolidation of vendors has already begun. The stability of BPA tool vendors is not just based on product sales. Most BPA vendors have a complementary set of consulting service offerings in areas such as BP methods and disciplines that can generate revenue at five

times the BPA tool rate; therefore, the stability of the BPA tool market – including smaller specialty/niche BPA vendors – is greater than may appear at first glance.

Still, of the nine markets leaders, five have 2% to 4% of market share – Casewise, EMC, iGrafx, Mega International and Proforma. Others include Microsoft with 30%, IDS Scheer with 15%, IBM with 9% and Telelogic with 7%. Therefore, we are a long way from market consolidation, yet many of the leaders could be strong candidates for acquisition.

The BPA tool market will continue to attract a number of new players, especially BPM vendors extending their tools to provide some limited BPA capabilities and other vendors, such as those in the object-oriented analysis and design and data modeling/database design markets extending their tools to support BPA. At the same time, we expect consolidation in an overcrowded market. Many small players, especially those coming late to the market or failing to address alliance partnerships and distribution channels, will be bought, fall to niche status or slowly disappear. However, the overall BPA tool adoption rate will accelerate as mainstream organizations get more involved with BP modeling in support of SOAs and look to address compliance issues with models based on government mandates.

Because BPMSs include BPA technology as a key component, many organizations will look to implement an integrated single-vendor solution from their strategic partners during the long term. Today, however, the BPMS and BPA tools markets are dominated by best-of-breed technology vendors. With the exception of IBM and Fujitsu, the other major software infrastructure vendors have not yet directly entered these markets; they compete only through partnerships and OEM relationships. Therefore, there will continue to be opportunities for specialty – generally niche – BPA vendors to flourish (see the vendors listed in Honorable Mention as examples).

## MAGIC QUADRANT

### Market Overview

Dozens of vendors are in the BPA market. In this Magic Quadrant, we examine in detail the 13 vendors with the greatest amount of revenue and highest-rated functionality. We have included five others in the category of "Honorable Mention." At first glance, it may appear that there is a larger than normal number of market leaders. This is because this market Magic Quadrant contains only 13 vendors (Gartner guidelines are 12 to 15) – most with highly competitive solutions. Vendors that did not meet the minimum inclusion and exclusion criteria we used would have been "nonleaders," with most appearing in the Niche Players quadrant generally due to weaker financial execution and vision than the leaders.

Because BPA tools support a diverse audience of users, it is important to understand that we elected to weight our requirements based on the use of the tools by BP architects and analysts doing BP improvement projects – and rank the vendors accordingly based on those weightings. Therefore, organizations with different will want to rank the vendors based on the intended use by the organization, when niche vendors or secondary leaders may be the best alternative.

In this research, we provide high-level bullets about the strengths and weaknesses of each vendor in the Magic Quadrant.

### Three Categories of BPA Tool Buyer Focus

To help readers relate their buying decisions to the offerings in this market, we provide a categorization of these tools based on the most frequent types of buying decision Gartner clients mention. We see three different types of mind-sets and focuses from the BPA tools prospects we talked with. We categorize these tool buyers in support of "Architects," "BP Modelers" and "BPMS Modelers." *Although most leading BPA tools address at least two of these categories, no one product meets the need of all potential users. Therefore, it is common to see more than one type of BPA tool purchased from one or more vendors to meet these needs.*

For example, with about a 30% of market share, the most widely used tool for BP modeling is Microsoft Visio. With a Gartner estimate of more than $500 million in new product and maintenance license revenue in 2006, many customers use Visio as simply a "drawing tool." We have included about 20% of Visio users in the BPA tool category, including those business users and analysts that do modeling as part of BP improvement initiatives. Visio is low cost, easy-to-use and has good integration with Microsoft Office – including process information stored in Microsoft Word, Excel and PowerPoint. However, most BPA tool buyers report that they need to complement the process modeling capabilities of Visio with more robust functionality. Not surprisingly, all the other leading BPA tools have a bridge from Visio to them. This allows the more sophisticated BP modelers in the organization using the more robust BPA tools to enhance the work previously done in Visio by less-sophisticated business users or analysts. We will examine these three types of buyer focus in more detail. Note: The sum of percentages exceeds 100% because many buyers are looking to satisfy multiple needs.

### Architects

Close to half of buyers are primarily looking to do BP modeling in a coordinated manner with others who are modeling the enterprise architecture or doing IT modeling in support of application development, package purchase or BPMS projects. Those in this category are looking for a model-driven systematic approach to BP improvement. There is a greater concern about the rigor of methodology being used, adherence to architectural standards and industry-specific frameworks, correctness of the models, and how the models are moved forward in the design and implementation process than in the other two categories. As a result, this category of tool is the most complex and costly – but with higher quality models comes a greater ability to leverage analytical efforts and relate BP and service deployments to the requirements identified by the models. Enterprise architects, data architects, IT modelers who are familiar with development methodologies, and BP architects and analysts who are a bit more sophisticated and seeking more rigor in process modeling than those in the other two categories will gravitate toward these solutions. Those in this architect buyer category are generally looking for tools that support formal methodologies (for example, Six Sigma and Lean) and frameworks (TOGAF, DoDAF, FEAF and IT Infrastructure Library).

### BP Modelers

This represents the primary focus for about a third of buyers. The BPA tools focused on the BP modelers category in this category generally want more than just a drawing tool, but neither are they looking for tools that are complex, costly and use rigorous systematic approaches to modeling. In many cases, they are looking to model only selected business processes (that is, the processes of

one business unit or project). These are BP architects and analysts (whether they reside in the business unit or IT) who are focused on modeling the business processes to improve understanding and look for process improvements without an immediate concern on how those processes will be (or have been) implemented in IT systems or BPMSs. Generally, they are just focused on their own immediate modeling needs and assume that the tools they buy will provide the necessary bridges to other IT and BPMS technologies at a later date. Many organizations find this an acceptable approach, especially when there is a need to get started with a BPA tool (before a BPM one) based on business drivers.

Many BP modeler buyers start with Microsoft Visio because of its ease of use, low cost and integration with Microsoft Office – especially when business users and less-sophisticated business analysts will be creating the models. But most BP architects and analysts in this category generally look to add BPA tools that offer more functionality than Visio. Many BP modelers are increasingly looking for tools that have pre-defined cross-industry, industry-specific and application package models and content to jumpstart their modeling efforts.

## BPMS Modelers

BPMS modelers are the approximately one-third of buyers who are primarily looking for a BPA tool that is tightly integrated with their BPM tool of choice. The ability to understand a BP from concept through assembly and automation of services as part of a BPMS is the primary objective. Some architect buyers want to front-end BPM with a robust BPA tool, and using a rigorous systematic approach to designing and implementing business services. However, the BPMS modeler is generally willing to accept a less functional modeling tool from its BPMS vendor to stay within the BPMS. Most organizations implement BPM tools first, and later add BPA tools. So, it is a natural progression to use the BPA tool of the BPM and only consider alternative BPA tools if/when the one from the BPM vendor proves insufficient to meet the needs of the organization. Virtually every leading BPA tool has bridges into the leading BPM tools, generally by generating Business Process Execution Language (BPEL) that can be imported into the BPM tool. This is not an ideal solution, because BPEL is not fully expressive on all elements that can be modeled. Some have tighter bridges to selected BPM tools – generally a better solution. Bidirectional bridges, which allow changes in either the BPA or BPM tool be reflected in the other, are better than a unidirectional bridge from the BPA tool to the BPM one. Most of these aforementioned bridges are unidirectional.

Many of the BPM tool vendors have their own modeling tools, and many sell them as a separate product. Although the BPA offerings from the BPM tool vendors tend to have better integration, in most cases, they do not have leading functionality. We attribute about 11% of market share ($45 million in revenue), or about 5% of overall BPMS revenue, to the BPA tool market for those modeling tools embedded in the BPMSs that are not sold separately as products. The remaining 18% is attributed to BPM and BPMS vendors that sell their BPA tools separately – that is, where it is possible to buy and use the BPA tool without buying the BPM tool of the vendor, although most buyers also purchase the vendor's BPM tool.

## Honorable Mention

Some technologies do not cleanly fall within the BPA market categories, but are worthy of mentioning. Here are five new or complementary technologies that you may be interested in:

**Embarcadero EA/Studio:** Embarcadero Technologies has a leading data modeling/database design tool, ER/Studio and a good (IT) object-oriented analysis and design tool: Describe is based on Object Management Group's Unified Modeling Language (UML) standard. The release of a BPA tool, EA/Studio, on 15 March 2007 completed Embarcadero's modeling suite, providing BP modelers with a low-cost companion tool that supports the Business Process Modeling Notation (BPMN) standard. The initial release of EA/Studio is focused on ease of use. It lacks some of the more-robust capabilities of BPA tool market leaders, but for many organizations it's a good alternative to Microsoft's Visio – especially for ER/Studio customers looking to integrate and leverage models and requirements across the business and data analyst roles.

**Global Enterprise Managers GEMWorX FlowModeler:** Many times, we speak to Visio customers who want to "use Visio better" with just a little more robustness in support of BP modeling. Others are concerned with training their employees on new and changed business processes. Global Enterprise Managers' GEMWorX FlowModeler extends Visio modeling capabilities (that is, it merely "pops up" in the Visio user interface environment in a transparent way to modelers) and propagates changes to processes out to impacted training materials. FlowModeler is part of the GEMWorX suite of integrated BP analysis and eLearning tools. GEMWorX is repository based, and includes support for versioning and team-sharing of model information. It is possible to capture processes in FlowModeler and quickly do Web publication of the process models. Analytical reports can be used to structure the training courses for those performing the BP using the integrated e-learning and training tools in GEMWorX. Like other BPA tools, FlowModeler performs (lightweight) simulation with animation, for ABC. FlowModeler also includes pre-formatted reports, readily enables users to query the data repository, and provides flexible search capabilities (via the workflow explorer) that support the maintenance and updating of process diagrams. FlowModeler/Visio diagrams can be published via Web-conferencing and leveraged by geographically distributed teams that are able to use process knowledge resources and e-learning assets to interactively test and confirm changes on-the-spot. Although Global Enterprise Managers is a small emerging company, the potential value of GEMWorX can be high. Organizations that need to produce end-user learning materials in coordination with model-based new development, package acquisition and BP improvement projects – including those by large external service providers (consulting) and ERP (application package) vendors – will find GEMWorX worth considering, as will those expecting high levels of personnel turnover requiring training of new employees.

**Lombardi Blueprint:** Lombardi is best known for its BPMS technology, Teamworks. It released a new business planning and modeling tool, Blueprint, on 30 April 2007. The main purpose of Blueprint is to enable users to develop business plans and business cases; relate them to key performance goals, indicators and business processes; and view this information in a variety of ways – including as a "balanced scorecard." Blueprint also helps facilitate broader user involvement in modeling at an earlier stage in the decision-making process, thereby increasing buy-in by stakeholders. Although Blueprint contains some lightweight process modeling capabilities, it is not intended to be a direct competitor to leading BPA tools, but can be used with them as a complementary planning and analysis tool with simple process modeling capabilities. Lombardi and Mega International (a leading BPA tool vendor) announced an integration between their technologies to forge a best-in-breed BPMS. Blueprint software executes on servers

managed by Internet hosting provider, Rackspace, which enables business analysts to get started immediately with Blueprint, as opposed to waiting for IT personnel to install and manage the software and data. It is possible to start with a free "personal account" version of Blueprint for a single project or process and later upgrade to a "team account" version for $500.

**Nimbus' Control-ES:** Like BPA tools, Control-ES (which will be renamed Control 2007 from the mid-2007 release) enables process design via modeling, process collaboration and communications. Its storyboard view provides a visual training medium for end-user "process walkthroughs" and can be used as the online operational manual for the organization. However, Nimbus goes beyond these capabilities, linking the resulting operational manual to the actual systems used and capturing process performance data to populate its metrics. This operational manual is presented to users through a Web-based portal, personalized according to the user's role. In this way, execution is linked to the explicit process model, synchronizing the model with its implementation. Control-ES has strong publishing capabilities (including approval workflow and versioning). Control-ES customers can also leverage content from other BPA tools, such as IDS Scheer's ARIS and Microsoft's Visio, through the BPM-X bridge supplied by HRW Consulting. For example, SAP process models can be imported to Control-ES through its SAP interface to use Control-ES's strong publishing capabilities. Nimbus plans to integrate Control-ES with SharePoint 2007, making SharePoint 2007 the delivery portal.

**Troux Technologies' Metis:** Troux Technologies is a leading vendor in the enterprise architecture tools market. Gartner receives many calls in the BPA market about Troux's Metis product (which has process modeling capabilities in it), although Troux does not market Metis sales to BPA prospects. Troux describes Metis as "business intelligence for the CIO" – a repository-based EA platform which includes support for strategic planning and analytics based on scenarios. It supports process modeling of current and future solution states, and has enterprise architecture frameworks, such as TOGAF, FEAF and DoDAF. However, based on Troux's architecture focus, Metis lacks some common functions and features found in most BPA tools, like simulation, ABC and

BAM. As such, it is an excellent tool for those focused on enterprise architecture or wanting to work at the conceptual/planning and analysis levels of the business architecture. It can also be interesting to BP and BPMS modelers looking to complement their current BPA tools with an enterprise architecture solution.

## Market Definition/Description
"BPA" is a Gartner term that defines the business modeling space where business professionals and IT designers collaborate on BP designs and architecture frameworks.

## Inclusion and Exclusion Criteria
We have chosen to include vendors meeting one or more of the following criteria in the BPA tool market:

- $12 million or more in new product and maintenance license revenue in 2006
- Greater or equal frequency of appearance in inquiries by Gartner customers in comparison to competitors listed in the Magic Quadrant
- Greater or equal frequency of appearance on Gartner customer evaluation shortlists in comparison to competitors listed in the Magic Quadrant
- BPA tools that do not meet the aforementioned criteria, but have some niche or specialty characteristic that we thought would be of interest to Gartner customers (for example, a "lightweight" or perhaps "good enough" BPA tool that is sold as part of a suite by a leading BPM vendor).

## Added
Tibco Software

## Dropped
Fuego was acquired by BEA, which now sells FuegoBPM as the AquaLogic BPM Designer, and which was not included in this year's Magic Quadrant due to not meeting our minimum criteria for inclusion.

**Table 1. Ability to Execute Evaluation Criteria**

| Evaluation Criteria | Weighting |
|---|---|
| Product/Service | high |
| Overall Viability (Business Unit, Financial, Strategy, Organization) | standard |
| Sales Execution/Pricing | no rating |
| Market Responsiveness and Track Record | no rating |
| Marketing Execution | no rating |
| Customer Experience | high |
| Operations | no rating |
| Source: Gartner | |

Note: ProActivity, which appeared in last year's BPA MQ, was acquired by EMC, and appears in this Magic Quadrant as part of EMC's Documentum Process Suite.

## Evaluation Criteria

### Ability to Execute

We have selected three major criteria to evaluate the ability of the vendor to execute in the BPA tool market. Others not selected explicitly are factored into the three selected (for example, sales and marketing execution and operations is subsumed as part of Overall Viability). First, we have identified Customer Experience as the highest rated evaluation criteria. What we are evaluating is the vendor's and product's ability to enable the success of the BP architects and analysts in their jobs versus their competitors. Second, we rate highly the product breadth and depth of functions and features, because many organizations are looking for the "most robust," "best" or "innovative" technology. The technology with the best functions and features is not always the one that makes the process architects and analysts the most successful. Third, we rate as slightly less important the Overall (current) Viability of the vendor and tool in the BPA market.

### Completeness of Vision

During the next five years as the acquisition of BPA tools grows by mainstream – and generally more risk-averse – organizations, we see vendor viability becoming an increasing concern to buyers. Therefore, we rate the business model vision as the most important aspect of completeness of vision criteria. For rating purposes, we include in the business model vision rating related criteria such as market understanding, market strategy, sales strategy and geographic strategy. We rate Offering (Product) Strategy highly not so much because of shortcomings in the current leading tools, but rather because we see opportunities to use improving functions and features, such as BAM and business rules, as well as new diagram types as standards continue to emerge – to further leverage the work of process architects and analysts. We include innovation in the rating for Offering (Product) strategy. Finally, we included Vertical/Industry Strategy as a lesser weighted criteria – but one that we see growing in importance as less sophisticated (more mainstream) BP architects and analysts look to jumpstart modeling efforts, buy models to save time, acquire "strawman" examples of best-practice business processes from leading third parties, and better understand purchased applications.

### More on Functionality Criteria

In "Consider Eight Functionality Selection Criteria When Choosing BPA Tools," we examined the following types BPA tool functionality:

- Business model analysis
- Integration and automation
- Business model drawing/development
- Ease of use in operation/development and administration
- Multiuser support/versioning and extensibility
- Methodology and use
- Performance and scalability
- Vertical industry and horizontal cross-industry template support

Some key function/feature differences we used to rate tool functionality in this Magic Quadrant include the ability to support process simulation, ABC, BAM, industry standards and frameworks, bridges from/to other leading BPMS and IT tools, and pre-built/pre-populated models and content.

### Leaders

These are high-viability vendors with proven track records in BPA tools with high degrees of functionality or market penetration, as well as vision and business investment. They are also well-positioned for the future because of completeness of vision – due to financial commitment and market share, technological differentiation or both. Leaders do not necessarily offer the best products for every customer project or role. However, they provide solutions that offer relatively lower risk. Current leaders include Casewise, EMC, IBM, IDS Scheer, iGrafx, Mega International, Microsoft, Proforma and Telelogic.

At first glance, it may appear that there is a larger than normal number of market leaders. This is because this market Magic Quadrant contains only 13 vendors (Gartner guidelines are 12 to 15) – most with highly competitive solutions. Vendors that did not meet the minimum inclusion and exclusion criteria we used would have been "nonleaders," with most appearing in the Niche Players quadrant generally due to weaker financial execution and vision than the leaders.

### Challengers

Challengers are well-executing vendors that have less completeness of vision than the leaders. Because of the inclusion and exclusion criteria we used, and the fact that this market Magic Quadrant contains only 13 vendors, there were no Challengers among the set of vendors analyzed.

### Visionaries

These vendors are differentiated by innovation – in terms of technological innovation or sales and marketing innovation. But, they have not achieved the record of execution required to reach a

**Table 2. Completeness of Vision Evaluation Criteria**

| Evaluation Criteria | Weighting |
| --- | --- |
| Market Understanding | no rating |
| Marketing Strategy | no rating |
| Sales Strategy | no rating |
| Offering (Product) Strategy | high |
| Business Model | high |
| Vertical/Industry Strategy | low |
| Innovation | no rating |
| Geographic Strategy | no rating |
| Source: Gartner | |

## Evaluation Criteria Definitions

### Ability to Execute
**Product/Service:** Core goods and services offered by the vendor that compete in/serve the defined market. This includes current product/service capabilities, quality, feature sets and skills, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

**Overall Viability (Business Unit, Financial, Strategy, Organization):** Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood of the individual business unit to continue investing in the product, to continue offering the product and to advance the state of the art within the organization's portfolio of products.

**Sales Execution/Pricing:** The vendor's capabilities in all pre-sales activities and the structure that supports them. This includes deal management, pricing and negotiation, pre-sales support and the overall effectiveness of the sales channel.

**Market Responsiveness and Track Record:** Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

**Marketing Execution:** The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message in order to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional, thought leadership, word-of-mouth and sales activities.

**Customer Experience:** Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups and service-level agreements.

**Operations:** The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

### Completeness of Vision
**Market Understanding:** Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen and understand buyers' wants and needs, and can shape or enhance those with their added vision.

**Marketing Strategy:** A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the Web site, advertising, customer programs and positioning statements.

**Sales Strategy:** The strategy for selling product that uses the appropriate network of direct and indirect sales, marketing, service and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

**Offering (Product) Strategy:** The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature set as they map to current and future requirements.

**Business Model:** The soundness and logic of the vendor's underlying business proposition.

**Vertical/Industry Strategy:** The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including verticals.

**Innovation:** Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

**Geographic Strategy:** The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.