MQSeries Workflow Competitors

Workflow Supplement to *Quick Competitive Guides*

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Session Topics

- **How to Compete Successfully**
- **Workflow Positioning**
- **Focus Competitors**
  - ▶ **Tier 1**
    1. Staffware
    2. Vitria
    3. BEA
  - ▶ **Tier 2**
    1. FileNet
    2. PegaSystems
    3. HP
    4. Microsoft
- **Summary**

Keys to Winning

★ Our track record says these things make the difference:

    ★ Get there FIRST - Set the vision (plant the land mines). Even so...ALWAYS assume competition is in there before you

    ★ Sell the overall BPM Strategy - lead with the process message. Position our products, do not let our competitors do so.

    ★ ALL SALES, ALL THE TIME - POCs, Demos etc. are SALES efforts, not technical works of art. Control the "message" constantly. YOU own the deal. PLAN all sales meetings.

    ★ ALWAYS use the right resources on the right deal at the right time. You do not get paid more by going it alone!

    ★ ...but, COORDINATE the resources: Client team, SAM, AIM Specialist, BPM Specialist, Service Provider. Agree on LEADERSHIP, provide FOCUS, and maintain a sense of URGENCY. Be clear on who OWNS which steps, by WHEN.
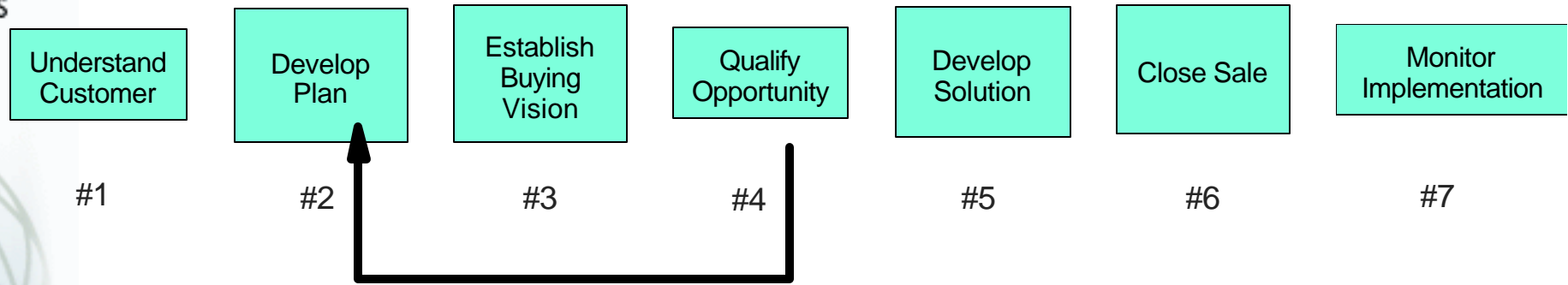
Important: Reference Selling

- **Use case studies online or reference stories <u>before you are asked</u>.**

- **Avoid site visits, if possible, as unproductive**
  - ▶ Middleware is like electricity, you only see the light bulb

- **If reference call or visit is demanded:**
  - ▶ Recommend indirect references with the Account ITS or Service Provider, they can typically tell the story
  - ▶ Steer them to public conferences where key references will be presenting
  - ▶ Verify that if the reference goes well <u>they will buy!</u>
  - ▶ Expect to create a detailed call sheet to request a reference, it must be a tactical SALES effort not just a to-do.

- **If you have a good production reference customer in your territory - embrace them!**

- **You are responsible to continuously create new references**

Signature Selling Method

Understand Customer	Develop Plan	Establish Buying Vision	Qualify Opportunity	Develop Solution	Close Sale	Monitor Implementation
#1	#2	#3	#4	#5	#6	#7

Re-engineer the vision

- If you are at Step 4 "Articulate IBM Capabilities and Qualify the Opportunity" and start to see that you may be losing the sale-**don't give up**
- go back to Step 2 "Develop Plans Linked to Customer Business Initiatives"
- Your purpose should be to help the customer **"re-engineer the vision"**
- Go back to understand what is the customer's "pain"
- The competitor may be saying that they offer the only end-to-end complete e-business solution, so we need to go back and convince the customer that IBM's level of completeness exceeds that of the competitor
- Show the customer that the competitor's solution may put the customer in a box rather than meeting all of the customer's needs, that is, de-spin what the competitor is leading the customer to falsely believe
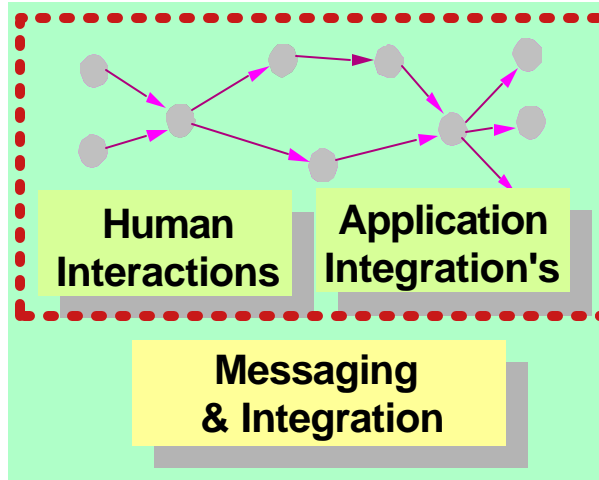
Business Process Management
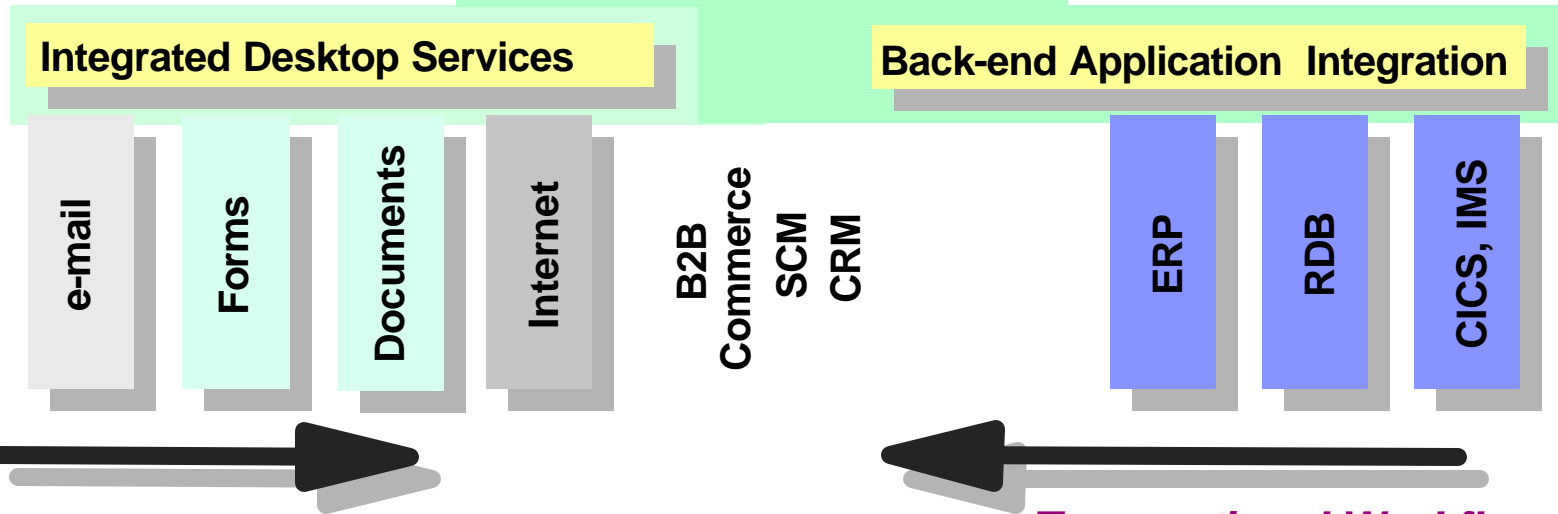
MQSeries Workflow

MQSeries Integrator

MQSeries Messaging

Process Automation
- ★ start-to-end
- ★ adaptive
- ★ transactional throughput
- ★ scales with growing volume/demand
- ★ repeatable, precise, controlled processes

Human Interactions

Application Integration's

Messaging & Integration

Integrated Desktop Services

Back-end Application Integration

e-mail

Forms

Documents

Internet

B2B Commerce SCM CRM

ERP

RDB

CICS, IMS

Workflow Origins
Human Cooperation's Work Management

Transactional Workflow
Straight-Thru Processing Zero-latency Operations

IBM

Gartner Workflow Positioning

Chart axes: Functional Completeness (Low to High) vs. Complexity (Low to High)

- Workflow Brokers
- Horizontal Tools
- IDOM Suites
- Application Frameworks
- Add-ons
- Workgroup Systems
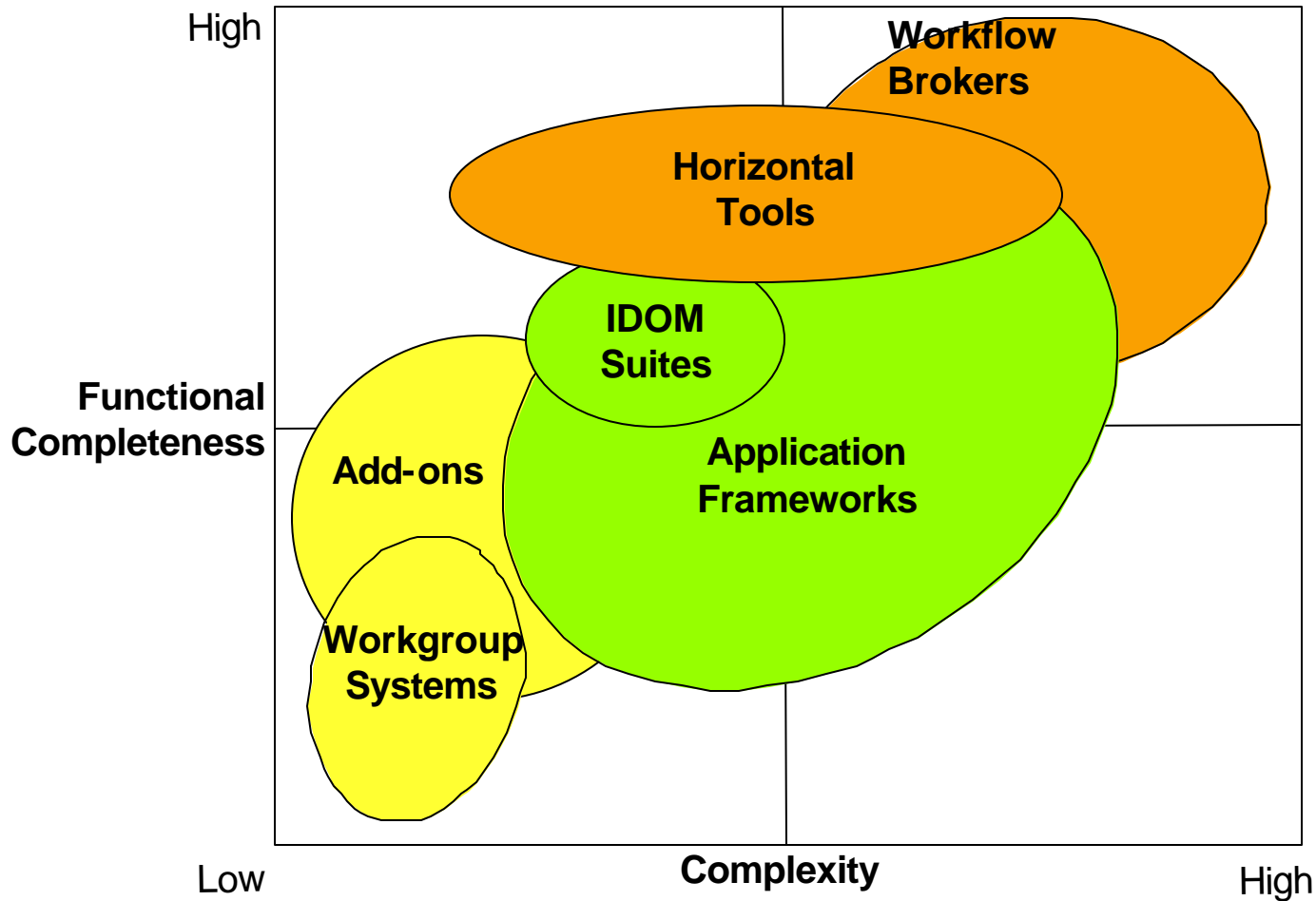
(C) Gartner Group, 1999

- Workflow for the Masses (i.e.. Lotus WF, Exchange)
- Application-Specific (i.e.. SAP, Seibel)
- Business Utility (i.e.. MQWF, Vitria, Staffware)

Positioning with our friends
(current draft)

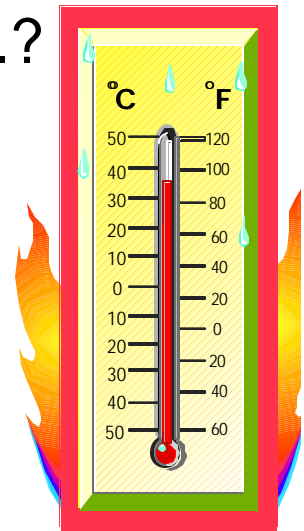|	MQSeries Workflow	Lotus Workflow	Versata VIS
Type of Workflow	Production workflow with predetermined processes	Collaborative workflow with adhoc processes	Collaborative workflow with adhoc processes
Types of integration	Flow control & process integration <u>across</u> applications, using MQSeries or API's	Flow control & process integration <u>between</u> Domino applications	Flow control & process integration <u>within</u> VLS applications
Information/Data	Transaction intensive	Document intensive	VLS Applications
Messaging	MQSeries	Domino	N/A (within Java VM)
Environment	Stand alone or as an extension of MQSeries	As an extension of Domino	As an extension of Versata VLS

How about our enemies

	Sales	Employees (30-50% in Sales & Mktg)	Stock 52-wk high	Stock Now	Lost Value
Vitria	$149M	786	$58	$3.25	94%
Staffware	$55M	324	$5209	$376	93%
TIBCO	$320M	934	$112	$7.70	93%
NEON	$190M	1,110	$45	$6	86%
BEA	$922M	3000	$89.5	$15.7	82%
PegaSystems	$87M	599	$9	$3.37	62%

✖ Most are new companies, some have **never** turned a profit.

✖ Which company would you **bet your business** on....?

✖ Even the oldest of these companies is taking a **loss**
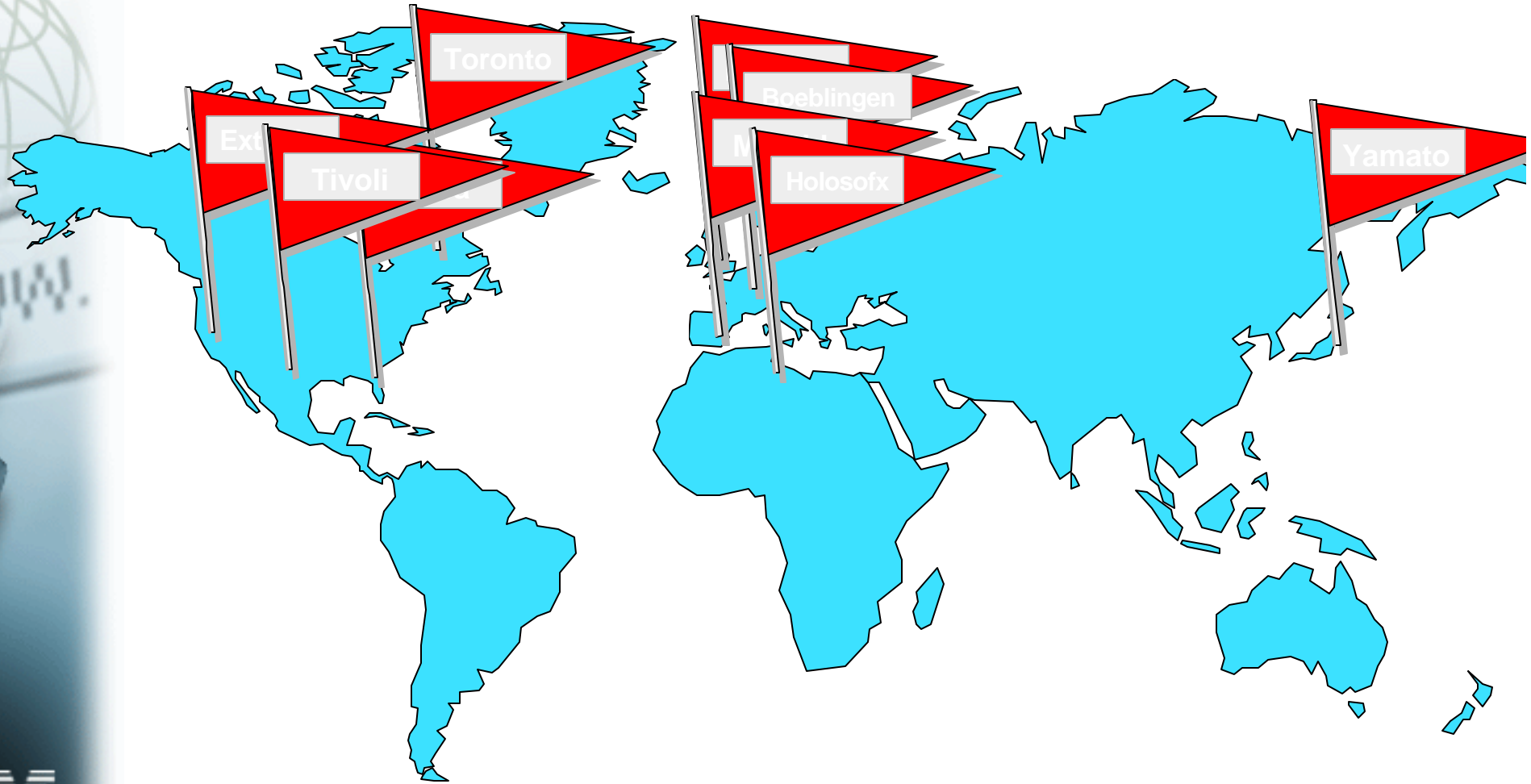
WSBI Development Organizations

Let's take a look at....

Staffware

Staffware Overview

- **Founded in 1984, UK based**
  - FY2000 revenue = US$55 million
  - Growing revenue, loosing money
  - 324 employees in 15 countries, laying-off in the U.S.
- **Product = Staffware2000**
  - Single Product Company = Staffware2000 V8.1
  - Traditional Workflow Market
  - Extending Staffware2000 with vertical solutions
    - e-Process Division founded in 2000 for vertical solutions
- **Delivering SW through partnerships**
  - BEA, PriceWaterhouseCoopers, Tower Technologies
  - Acquired FPS Pty, Australia services company in 2000

"A slower more deliberate buying process, especially in the UK financial services sector, was blamed by Staffware Plc for disappointing first-half results, which are likely to lead to a **loss of 2.5m to 3m pounds ($3.5m to $4.2m)"**

Product Mapping

IBM		Staffware
Holosofx Workbench	**Process Modeling**	N/A
Holosofx Dashboard	**Real-time Monitoring**	N/A
WebSphere Partner Agreement Manager	**B2B**	eProcurement
MQSeries Workflow	**Workflow**	Staffware2000
MQSeries Integrator Adapters and MQAO	**Message Broker**	BEA eLink partnership
MQSeries	**Messaging Backbone**	Proprietary
MQSeries Everyplace	**Pervasive Messaging**	WAP Client Support
MQ/MQSI	**Pub/Sub** (high volume, multicast)	BEA partnership

Staffware2000 Product Overview

- **Platforms**
  - ▶ Server/Database
    - Windows NT/2000 (SQL), HP, Sun, AIX (Oracle & SWC)
  - ▶ Clients
    - Win32, UNIX API's, Specific to development environments

- **Development tools**
  - ▶ Thick client
    - Graphical Forms Designer, Staffware VBA Tools
    - Power Builder and Oracle Forms integration
    - MS Exchange & Notes e-mail integration
  - ▶ Thin Client
    - Java & HTML, limited support through development tools
    - Does not have an ultra-thin client, still needs DLL's on PC

- **Pricing (aggressively discounting)**
  - ▶ Server=$10K+DB, Users=~$250, Tools=$1K/user

Staffware Strengths

- **Largest workflow vendor**
  - Claims 25% marketshare based on 1998 study
    - IBM had 30% in same study (MQWF 23%, Domino 7%)
    - Analysts are no longer publishing pure WF marketshare #'s
  - Very strong in Europe and Australia
- **Easy to create GUI's with development tools**
  - Quick deployment cycle for people-workflow
- **Market focus and good references**
  - "All we do is workflow, we have been doing it since the 1980's
- **Industry and Application focus**
  - Finance, Insurance, Gov., Telco
  - eSCM, eCRM, eProcurement, eBanking
- **Global presence**
  - Extending partnerships & Acquisitions
  - Moving into the U.S. market

Staffware Weaknesses

✗ **Single Product Focus**

✗ **No EAI products for application integration**

- ▶ Supports MQ through a connector
- ▶ No Transactional Support
- ▶ Channel conflict with BEA

✗ **No support for Web Services, lack of vision**

✗ **No support for z-OS or DB/2**

✗ **Few references in the U.S.**

- ▶ Question their support capabilities

✗ **Weak development tools for thin clients**

- ▶ Compare to ours + WebSphere support
- ▶ Requires code on the desktop

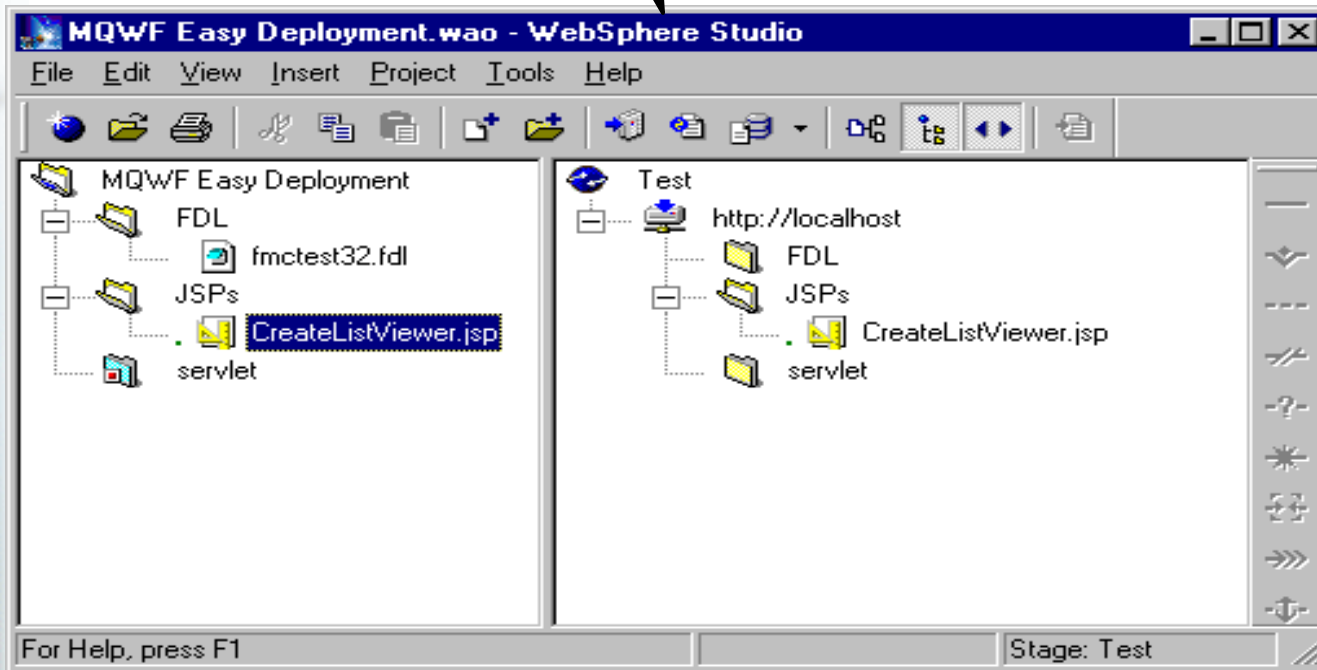➡ We lose from misperception or comparisons to previous versions

Rapid WF Deployment with WS Studio

e-business™

MQWF
Buildtime

HOLOSOFX
Workbench

Generated
FDL

Import/Export

MQSeries
Workflow

MQWF Easy Deployment.wao - WebSphere Studio

File   Edit   View   Insert   Project   Tools   Help

MQWF Easy Deployment
  FDL
    fmctest32.fdl
  JSPs
    CreateListViewer.jsp
  servlet

Test
  http://localhost
    FDL
    JSPs
      CreateListViewer.jsp
    servlet

WebSphere

JSP's

For Help, press F1   Stage: Test

IBM

MQWF Silver Bullets vs. Staffware

- **IBM has an enterprise solution, not just departmental**
  - ‣ Scalable from NT to mainframe, with the same FDL
  - ‣ Embedded XA-compliant transaction coordinator
  - ‣ Natively leverages MQSeries for guaranteed delivery

"You are not choosing a WF vendor for the <u>first process</u> you automate, you are choosing it for <u>ALL</u> of your processes"

- **MQWF has better performance in both STP & People WF**
- **MQWF exploits process reuse**
- **MQWF has better tools for web deployment**
- **Integrated Process Modeling & Monitoring tools w/Holosofx**
- **Staffware is the early 90's model, where is their vision?**

<u>Bottom Line:</u> Make sure the customer/consultant understands V3.3 functionality, BPM strategy, EAI offerings

Let's take a look at....

Vitria Overview

- **Founded in 1994**
  - FY2000 revenue = $149M, not yet profitable
    - 2/3 from SW, 1/3 from Services
  - 786 employees, half in sales/marketing
- **Acquisitions- XML Solutions, March 2001**
  - for EDI to XML and XML to XML conversion capabilities
- **Strategy:**
  - Champion a powerful, modern form of A2A and B2B integration based on BPM
  - Jointly develop and market-specific process templates (80% solutions) with key partners, e.g.. BusinessWare for DSL, BusinessWare for RosettaNet
- **Leverage partnerships with key resellers and SIs - Accenture, KPMG, Nortel, PWC and Siemens**

Product Mapping

IBM		Vitria
Holosofx Workbench **Holosofx Dashboard(s)**	Process Modeling Real-time Monitoring	**ARIS Partnership (announced** **Business Cockpit**
WebSphere Partner Agreement Manager	B2B	
MQSeries Workflow	**Workflow**	**BusinessWare**
MQSeries Integrator Adapters and MQAO	**Message Broker**	
MQSeries	**Messaging Backbone**	
MQSeries Everyplace	Pervasive Messaging	**N/A**
MQ/MQSI	Pub/Sub (high volume, multicast)	**BusinessWare**

BusinessWare Product Overview

- **Perceived Single Product Company**
  - BusinessWare does it all
  - EAI, Workflow, Monitoring, B2B, Adapters

- **Platforms**
  - Server/Database
    - Windows NT/2000 (SQL), HP, Sun, AIX (Oracle, DB/2, Informix, Sybase)
  - Clients
    - Win32, Sun, HP, AIX

- **Marketing Message**
  - First business level, model driven, software solution for EAI
  - Premier solution for real-time e-business solution

- **Pricing**
  - Server=$75K+DB, Dev Tools=$25K
  - Connectors=$15K to MQ or DB, $50K to SAP

BusinessWare - The Complete Solution

Enterprise Application Integration
Integrating applications and data sources within an enterprise

Real-time Analysis
Monitoring, measuring and analyzing the performance of working business process
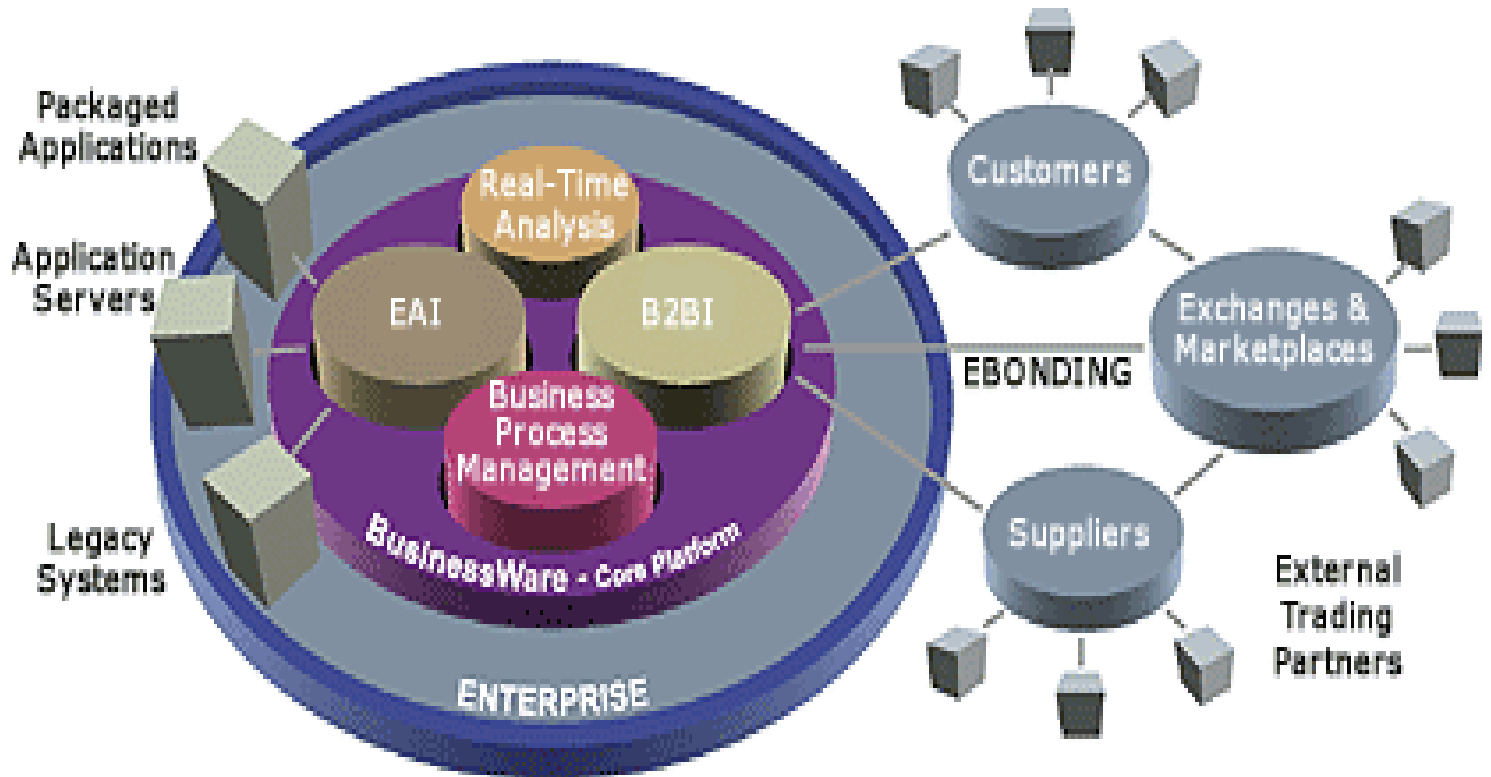
Business Process Management
Combining process modeling, automation and workflow to execute business processes in and between organizations

Business-to-Business integration
Integrating both business level process and data between organizations

Vitria Strengths

- **Vitria competes with IBM's BPM w/1-Product**
  - ► BusinessWare vs. MQ, MQSI, MQWF, PAM, & Holosofx
  - ► Leading edge software technology in business process automation, monitoring and messaging (Gartner)
  - ► Strong vision and GREAT DEMOS!
- **Professional and aggressive sales force**
  - ► Targeting LOB business executives
  - ► Offering the only process-centric answer to EAI
  - ► Many ex-IBMers, play to our weaknesses
- **Messaging/Communicator Performance**
  - ► Connectors can be built with GUI based tool that assembles connectors from "building blocks", promising high reuse
- **Company is growing fast, with plenty of casl**
- **Claim 350 customers**

Vitria Weaknesses

- **Not a single integrated product**
  - Actually 4-different servers, weak tooling requiring lots of custom coding, and few <u>production</u> references
  - Good demos, but difficult in POC's

- **Weak people-oriented workflow!**
  - Only supported since V3.1, Fall of 2000
  - Limited work assignment model, can only be used for simple workflows like EAI or exception handling
  - Does not support push and pull models for worklists
  - Process instances stored in a flat-file,
    - Limits number of in-flight process instances
    - Significant performance hit with scale. What is the max?.

- **No embedded transaction coordinator**
  - Claim they can guarantee the application will fire once, but not only once. Means extra coding in the connectors
  - No two-phase commit, rollbacks must be done by coding

Vitria Weaknesses (cont.)

- **New player with limited experience**
  - ► Few production references
  - ► Have never migrated production customers between versions with in-flight processes
  - ► No support for version control or effectively dates/time of new process versions
    - Requires renaming the current process which affects the calling programs, or
    - changing all in-flight processes to the new model which can cause logic errors

- **Event-driven processes**
  - ► Not as powerful as our directed graph
    - Cannot route data and process flows separately
  - ► Allows adhoc changes on the fly
    - Sounds good but can cause logic errors, does not 'enforce' business rules.
      - #1 financial benefit for WF is quality improvement

MQWF Silver Bullets vs. Vitria

- **Several products, not one.**
  - ▸ We are better integrated! Proof-point is WSBI.
- **Store process instances in a flat file - ouch!**
- **We have Business Modeling & Monitoring Today**
  - ▸ Vitria recently announced partnership with ARIS
    - ● We have it today with Holosofx ($7K/user) & ARIS ($60K/user)
  - ▸ Cockpit is only realtime **marketware**. Some standard SQL views of th of the process DB. Needs much customized.
- **Just released people-workflow support in V3**
  - ▸ No client, just API's
  - ▸ Weak people assignment constructs
- **Little or no experience in this space**
  - ▸ Few production references
  - ▸ Promising a lot, delivering much less. Duck and cover!

> _Bottom Line:_ Set the vision, **challenge everything,** promote our 7-years experience in WF

Let's take a look at....

BEA Overview

- **Founded in 1995**
  - FY2000 revenue = $922M
    - Nearly half from services
  - 3000 employees across all product WebLogic, Tuxedo,...
- **Workflow Offerings**
  - Introduced eLink Business Process Option (BPO) 2H99
    - Offered as a wrapper for In-Concert (now part of TIBCO)
    - Not successful
  - Acquired j-FLow product in 1H2000
    - Brought to market as **WebLogic Process Integrator**
    - EJB Workflow engine
- **BEA e-business Platform**
  - Similar to WebSphere Platform for e-business
- **Process Management is not their strong suit**

Product Mapping

| IBM		BEA
Holosofx Workbench	Process Modeling	N/A
Holosofx Dashboard(s)	Real-time Monitoring	N/A
WebSphere Partner Agreement Manager	B2B	WebLogic Collaborate
MQSeries Workflow	Workflow	WebLogic Process Integrator & BPO
MQSeries Integrator Adapters and MQAO	Message Broker	BEA eLink
MQSeries	Messaging Backbone	BEA Tuxedo /Q
MQSeries Everyplace	Pervasive Messaging	N/A
MQ/MQSI	Pub/Sub (high volume, multicast)	BEA eLink
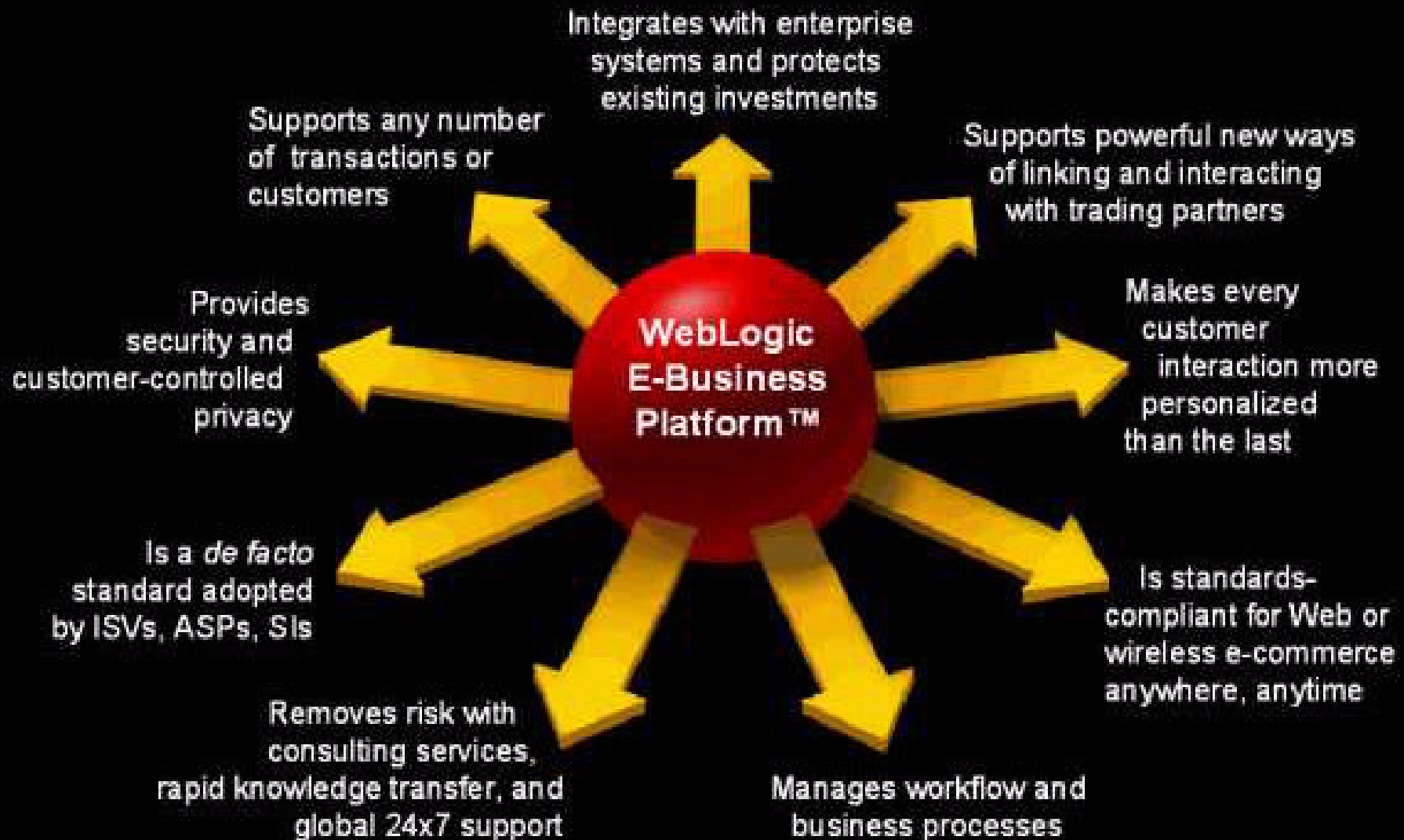
Source : BEA eWorld 2001 Conference KeyNote by Bill Coleman 3/2001

WebLogic Process Integrator

- **Presentation looks crisp and says the right technology terms, but...**
  - They have a confusing process strategy with BPO
  - They have limited experience and a new product
  - It has a prerequisite for WebLogic Server and does not support WebSphere
- **Limited support for people workflow**
  - Stores the instances in memory, no persistence to DB
  - Limited # of in-flight processes,
  - Difficult doing people assignments
- **More expensive than MQWF**

BEA Process Management

- **When Competing with BEA in EAI or BPM**
  - ▶ Re-engineer the customers vision to BPM
    - Steer customer requirements to a process focus
    - Lead with the process message, BEA's "weakest link" and IBM's strongest component
  - ▶ They have a fragmented product line, exploit it!
- **WebLogic Process Integrator**
  - ▶ BEA targets WebLogic Application Server customers
    - MQWF will also support the WebLogic Server
  - ▶ We have more experience, and more functionality
- **Aggressive Sales Force**
  - ▶ BEA strategies look like carbon copy of IBM's
    - Except their products cannot support the promise.

> *Bottom Line:* Challenge everything! Few 'good' production references.

Let's take a look at....

FileNET®
The Substance Behind eBusiness™

FileNet Pentagon

- **FileNet Pentagon VisualWorkflo**
  - ▶ An imaging extension, requires IMS imaging server
  - ▶ No strong EAI compontents
- **MQWF can be used with imaging system of choice**
  - ▶ and is being used with FileNet ing by production customers
  - ▶ EDMSuite uses MQSeries Workflow
- **No transactional support (MQSeries, CICS, IMS)**
- **No native S/390 server**
- **Supports Holosofx, but only 25% integration**
  - ▶ Position customer to start with neutral Holosofx (Trojan horse)
- **Does not have a Graphical process monitor**
- **Lotus Workflow is the IBM offering vs. FileNet Pentagon Ensemble**

FileNet

✗ **More imaging than independent workflow**

✗ **Rarely makes the short list for workflow only**

✗ **No EAI strategy**

✗ **Document model**

✗ **Can be a challenger in FileNet's install base**

✗ **A "technology sell" can work well here**

Bottom Line: Don't worry about them if FileNet imaging is not installed, otherwise sell our overall BPM Strategy and MQWF architecture

Let's take a look at....

PEGASYSTEMS

PegaSystems

- **Only other workflow competitor running native on OS/390**

- **Have packaged applications for Finance Industry, now selling as a workflow middleware solution**

- **Customers are happy with the applications, but...**
  - ▶ Bad middleware solution for EAI
  - ▶ Requires a PegaSys consultant to do any changes to the GUI
  - ▶ Seperate the PegaSystems applications from middleware

Bottom Line: Very difficult development environment, so the programmers hate it.

Long time to implement changes, so the Line of Business will hate it!

Let's take a look at....

HP
Hardware Products

- **HP Process Manager 5.1, was ChangeEngine**
- **NetAction strategy announced in February**
  - HP changes SW strategies once or twice a year
- **New name, New strategy, Old Stuff!**
  - HP may be on your customers list if they have HP hardware
  - HP Process Manager will rarely make the short list
  - MQWF supports HP-UX V10 now, will support V11 in Dec.
- **We have never lost to these guys.**
- **Acquired BlueStone ($470M) October of 2000**
  - Still waiting to see them on the radar screen.

Bottom Line: Don't worry about them.

Let's take a look at....

Microsoft

Microsoft Orchestration

- **Orchestration function in Bizware offering**
- **Part of overall dot.Net strategy**
- **Only runs on Windows2000**
- **More strategy than solution today**
  - ▶ Just became GA in June
  - ▶ Don't know of anyone even using the Beta code
  - ▶ At this time it's only a toy!
- **Promote our experience**
  - ▶ An enterprise customer would be crazy to put anything into production on Bizware today.
  - ▶ Point out your customers project deadlines and the Microsoft track record for delivering software.

Bottom Line: Don't worry about them....YET!

MQWF Advantages

Highlight	Proof Point	Value Statement
1. **Transactional Integration**	**Embedded XA-compliant Transaction Coordinator**	**Will complete each process step, completely and sufficiently**
2. **Scalability**	**In production with:** • **1 million in-flight processes** • **>10,000-users** • **800 tx/sec**	− **We can handle business & project growth** − **Provide a platform for Enterprise BPM**
3. **Based on EAI**	**DB/2, MQ, MQSI, MQAO, Adapters, WebSphere**	− **Adaptable BPM implementation** − **Low cost of ownership** − **Focus on value not infrastructure**
4. **True BPM**	• **Business Modeling** • **Process Automation** • **Business Monitoring** • **Intra- & Intercompany**	− **Provide optimized solutions faster** − **Deliver what the business needs** − **Better able to manage your business** − **Platform for business agility**
5. **Support for Standards**	**MQ, XML, WfMC, LDAP, SOAP, UDDI, WSDL, J2EE, EJB, RMI over IIOP**	− **Interoperability with your existing infrastructure** − **Exploit new opportunities**
6. **IBM is your best partner for BPM**	• **7-years experience in BPM** • **One vendor for HW, SW, Service/Support** • **Financially stable** • **Already your partner**	• **Leverage your buying power** • **Reduce project risk** • **Best technology today, with a vision for tomorrow**

Competitive Summary

★ **Lead with overall BPM message and WS strategy**

   ★ Use WSBI as proof point for family integration

   ★ Let Process Automation drive our entire BPM stack

★ **Use Holosofx and MQSFSE to keep a business focus**

★ **Message queuing engine market dominated by MQSeries - now the de-facto standard.**

   ★ Sell MQWF as an extension to this infrastructure

★ **Wide array of differing segments - positioning is <u>not</u> simple. Make sure you are competing in the right one.**

★ **Use business FUD:**

   ★ Market players are consolidating in earnest, who will remain and lead. Who will not survive.

Further Information...Stay on top!

★ **To Access the full QCGs, CSGs, and other MQ Family Competitive Information, go to:**

▸ **MQSeries Competitors Web Page:**

w3.software.ibm.com/sales/aim/prod/mqseries/competitors.html

- "One-stop shopping" web page for all the latest MQSeries Competition news and deliverables

OR through....

▸ **AIM Home Page:**

w3.software.ibm.com/sales/aim (One-stop shop for sales info on all AIM products)

- (Choose *"Competitive Information",* and then *"MQSeries Competitive Page..."*

▸ **MOM Market Players DB:**

- Access via **AIM Home Page** (Choose *Competitive Information,* then *MOM Market Players DB*), or via **MQSeries Competitive Web Page,** or directly: **http://V06DBL02.hursley.ibm.com/m_dir/MQComp.nsf**
- Contains notes on individual competitors, including comments from sales people in the field (more needed!), plus very detailed Consultant Reports.

Holosofx BPM Suite

For Business Process Modeling, Analysis, Simulation, and Monitoring

70% of the MQWF Customers in the U.S. are using Holosofx

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Holosofx Competitive Landscape

- **Two classes of modeling tools**
  - ▸ Process Modeling Documentation (picture drawing tools)
    - ● Microsoft, Visio
    - ● Micrografx, IGrafix
  - ▸ Process Modeling for Analysis
    - ● IDS Sheer, ARIS
    - ● Meta, Workflow Modeler
    - ● Holosofx
- **Visio and IGrafix**
  - ▸ Low cost (~$1K/user), popular documentation tools,
    - ● One step above Powerpoint
  - ▸ Little or no analysis capabilities
  - ▸ No export to any workflow engine
  - ▸ You get out LESS than what you put in
  - ▸ Not true competitors to the Holosofx Workbench

ARIS

- Very popular in EMEA
- Modeling tool used for SAP processes
- Very good and strong in Analysis and Modeling
- For the process purest
- $60K per desktop for the full suite vs. $7K for Holosofx
- We have a bridge to import ARIS models in MQWF today.
- Announced relationship with Vitria (unknown functional description or timeframe for delivery)
- Workflow Monitor is being developed for future deployment

Meta

- Very popular with government, due to IDEF support
- Exports into FileNet's Visual WorkFlo
- $30K per desktop
- Analysis is good, but not as good as Holosofx or ARIS
- No workflow monitor

e-business