

# Hyland

Founded 1991 | HQ Westlake, OH | >3,000 employees (approx.) | >\$700M revenue (est.)

*Hyland is a leader in all types of content management, with a considerable stake in the process automation market, particularly case management. Hyland has a 30+ year history of providing content and document solutions and envisions process automation as a key differentiator for its core content technology offerings.*



## The Company

Hyland is a market leader in document solutions and content-centric process automation.<sup>1</sup> The privately held company was formed in 1991 and is headquartered in Westlake, Ohio. Hyland has 30 offices worldwide with more than 3,000 employees and 22,000 customers. Hyland does not disclose revenues, but Deep Analysis estimates the firm's 2018 revenue as more than \$700 million. Thoma Bravo, a private equity firm, acquired a controlling interest in the company in 2007 for \$265 million (estimated). In 2017, Thoma Bravo acquired Lexmark International's software business, with Perceptive Software going to Hyland and the remaining companies becoming part of Kofax (another Thoma Bravo holding and Hyland competitor).

Hyland has a strong presence in healthcare, insurance, financial services, higher education, and regional and national government. Examples of industry-specific use cases include:

- patient portals, patient care, and clinical records (healthcare)
- agency management, new business processing, claims processing, product development, and field new business (insurance)
- wealth management, fraud investigations, check processing, and audit and compliance (financial services and banking)
- enrollment management, student housing, billing, and student health (higher ed)
- grants management, policy and procedures, investigations, freedom of information act (FOIA), and digital transformation (state, local and national government)

Hyland also specializes in horizontal (or functional) solutions such as accounts payable and receivable, HR processes (e.g., recruiting, onboarding, and integration with HRM), and contract management. The company's process automation platform is well integrated with Hyland's flagship content products for intelligent capture, content management,

customer communications management, collaboration, retention management, and process analytics. The company targets its sales efforts at departmental (or line of business) managers, other business participants involved in business process optimization, IT managers, and senior/C-suite executives. Sales are split 60/40 between its direct sales channel and its channel partners.

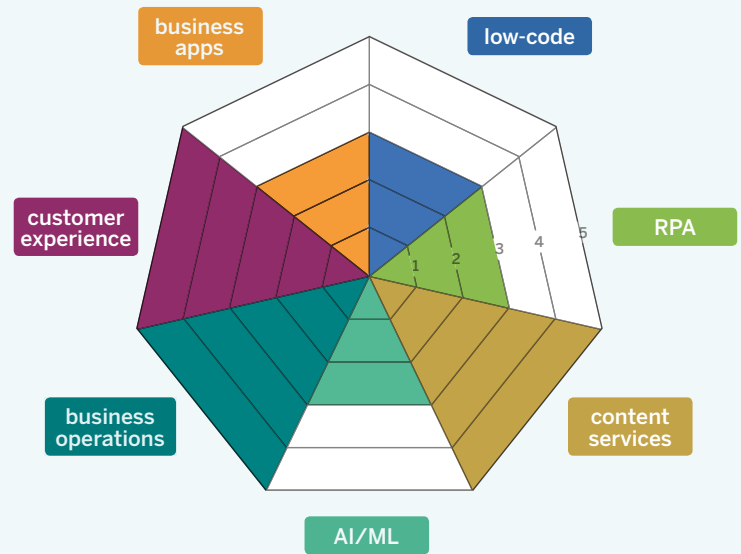
## Market and Technology Positioning

Hyland is entrenched in the content-centric process automation space, after carving out an early leadership position in content technologies and then doubling down on content solutions over the past three decades. The firm is well positioned with small and medium-size businesses but also competes for enterprise customers. Most of Hyland's process automation deals involve multiple aspects of content automation, ranging from intelligent capture and content management to customer communications management and retention management.

Hyland is most closely positioned against other process automation vendors with similar content management and case management roots. In the content-centric, process automation market, Hyland provides a wide range of content solutions including intelligent capture, federated search, federated content stores, integration with enterprise suites, and retention management (including blockchain), as well as extensive expertise in the vertical and horizontal processes within its targeted industries.

Figure 1 provides a high-level overview of Hyland's strategic positioning. (Note: this radar graphic is not a product analysis or product rating; rather, it represents vendor positioning within the digital process automation market.)

Figure 1  
Hyland's Positioning



### Legend

#### low-code

- 0 – no emphasis on low code
- 1 – business developer focus
- 3 – extensive low-code tooling
- 5 – general purpose low-code market

#### RPA

- 0 – no RPA offering
- 1 – custom integration
- 3 – 1+ partners/OOB connectors
- 5 – deep partnership/native RPA

#### content services

- 0 – no content support
- 1 – native content support
- 3 – partnership with 1+ content providers
- 5 – native content services/management

#### AI/ML

- 0 – no focus on AI/ML
- 1 – initial insights/experimentation
- 3 – multiple AI/ML deployments (e.g., capture, next best action, NLP)
- 5 – native AI/ML in DPA product

#### business operations

- 0 – focus on CX only
- 1 – targeting the back office
- 3 – pre-built use cases for back office
- 5 – strategic focus on complex business operations

#### customer experience

- 0 – focus on biz ops only
- 1 – focus on CX for biz ops
- 3 – targeting sales and marketing
- 5 – strategic focus on end-to-end CX-centric processes

#### business apps

- 0 – no focus on business apps
- 1 – pre-built templates/forms for specific processes
- 3 – 1+ pre-built apps >50% packaged
- 5 – fully packaged apps

A deeper analysis of the categories on the graph shows:

→ **Hyland provides low-code process automation tools for developers, administrators, and businesspeople.**

Hyland uses a persona-based approach for designing the UI and offers preconfigured solutions to minimize additional development. Coding is minimized or eliminated through point-and-click configurability, drop-down menus, and native connectors to third-party applications such as ERP and Microsoft Outlook and Office, as well as point solutions such as e-signatures. Hyland is currently working on a web-based integration with Salesforce.

→ **Hyland recently partnered with Blue Prism for RPA.** Hyland will resell Blue Prism's RPA platform, in addition to adding complementary RPA capabilities to Hyland's existing portfolio of process automation and integration tools.

→ **Managing content – in many different forms and tools – has been Hyland's strategic purpose since inception.** Hyland's product capabilities span the gamut from content capture to management, automation, and retention, as well as dynamic case management. Managing content in its many stages of use is Hyland's core competency, allowing it to be shortlisted in most deals for content-centric process automation, particularly within its core industries and functional areas, and in SMB organizations.<sup>2</sup>

→ **AI/ML is crucial to the firm across its wide spectrum of products,** including intelligent capture, data discovery, process mining, and vertical applications. For example, Brainware uses neural networks for intelligent recognition and data

extraction. Hyland also uses third-party artificial intelligence/machine learning (AI/ML) in Acuo, its vendor-neutral archive product, to support clinical research and precision diagnostics. Hyland envisions a future role for AI/ML in data mining and analytics across multiple data sources and in data discovery within vertical applications. Within process automation, Hyland anticipates using AI/ML to design processes that optimize business goals and thus are a better fit for the organization. The company anticipates a significant influx of data from embedded devices and it plans to use AI/ML to gain insights and take suitable actions.

→ **Business operations is Hyland's sweet spot.** Almost all of Hyland's targeted use cases and pre-built applications are based in business operations and/or the back office. A large majority of Hyland's process automation revenues are derived from back-office and business operations use cases.

→ **The process automation platform addresses customer experience via customer service and customer-centric case management processes.** Often, these customer-facing processes are industry specific, such as higher-ed solutions for student advice, student enrollment, and student portals, or patient portals in healthcare. Other customer-centric products in Hyland's portfolio include software for external customer collaboration and sharing, and customer communications management.

→ **Hyland's process automation platform offers a wide selection of pre-built configurations,** including appeals and grievances, loan mortgage tracking, contract lifecycle management, public

records management, HR performance management, public records requests, and boards and committees. These and other use cases are 80-100% packaged out-of-the-box. (Specifically, contract management and public records are 100% pre-built.) Other pre-packaged solutions (50-80% pre-built) require extra

configuration. Examples include IT ticketing, checklists for process control, incident management, accounts payable, and invoice processing. Applications with pre-existing data structures and relationships (that are less than 50% packaged) include student advising and asset management.



## Our Opinion

**Hyland is a leader in all types of content management, with a considerable stake in the process automation market, particularly case management.** Hyland has a 30+ year history of providing content and document solutions and envisions process automation as a key differentiator for its core content technology offerings. Hyland's deep knowledge and experience in implementing vertical solutions and functional (cross-industry) business processes differentiates it most in the process automation market. The firm has kept pace with process automation developments by partnering with Blue Prism for RPA, implementing AI/ML for intelligent automation and clinical records, and envisioning a near-term future for AI/ML in process mining, data analysis, and aligning process designs with business goals.



## Advice to Buyers

Shortlist Hyland if your focus is on buying process automation software from a leading content management vendor with a wide spectrum of content products that are integrated with process automation. In particular, consider Hyland if your organization is an SMB or in insurance, higher ed, healthcare, state and local government, or financial services. Look closely at Hyland's pre-configured business processes to see how closely they match your organization's automation needs; there may be an opportunity to minimize process automation development when deploying specific solutions. If RPA is of particular interest, Hyland's recent partnership with Blue Prism adds RPA capabilities to Hyland's existing portfolio of automation and integration tools.

### Strengths

- 30+ year track record in solutions for documents, images, content, digital records, and e-forms
- Deep knowledge and experience in five core industries and several cross-functional processes
- Excellent mix of direct sales and partner channels
- Strong presence in SMB companies
- Strong private equity investor

### Opportunities

- Expand RPA capabilities to be more competitive against market leaders
- Accelerate AI/ML R&D to pursue process mining and process design recommendations
- Use process automation to leverage content solutions sales and vice versa

### Aspirations

- Gain greater market visibility (for all their success, Hyland still runs under the radar much of the time)
- Create more pre-configured, pre-packaged business use cases
- Potentially productize select out-of-the-box applications

### Results

- Large installed base of 12,000+ customers worldwide
- Highly competitive in the content management market

### Endnotes

1 Hyland most often uses the terms “business process management” (BPM) and workflow but the firm operates in the digital process automation marketplace.

2 Hyland’s typical competitors in content-centric process automation include Alfresco, IBM, Kofax, Laserfiche, and OpenText.

## Research Series: Digital Process Automation State of the Market

This report is part of Deep Analysis’s Digital Process Automation State of the Market research series, which includes these reports:

- State of the Digital Process Automation Market: Current Assessment 2019
- State of the Digital Process Automation Market: Trends 2020-2025
- Vendor Vignettes for Digital Process Automation Vendors

# About Deep Analysis

**Deep Analysis** is an advisory firm that helps organizations understand and address the challenges of innovative and disruptive technologies in the enterprise software marketplace.

Its work is built on decades of experience in advising and consulting to global technology firms large and small, from IBM, Oracle, and HP to countless start-ups.

Led by Alan Pelz-Sharpe, the firm focuses on Information Management and the business application of Cloud, Artificial Intelligence, and Blockchain. Deep Analysis recently published the book "Practical Artificial Intelligence: An Enterprise Playbook," co-authored by Alan and Kashyap Kompella, outlining strategies for organizations to avoid pitfalls and successfully deploy AI.

Deep Analysis works with technology vendors to improve their understanding and provide actionable guidance on current and future market opportunities.

Yet, unlike traditional analyst firms, Deep Analysis takes a buyer-centric approach to its research and understands real-world buyer and market needs versus the "echo chamber" of the technology industry.

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## About the Author

Connie Moore is Vice President and Principal Analyst at Deep Analysis. She joined the firm after four years as Senior Vice President, Research, at Digital Clarity Group, and more than twenty years as Research Director and Vice President at Forrester Research. Connie is a widely acclaimed speaker, advisor, consultant, and expert in digital process automation, customer experience management, digital experience platforms, and content services. In 2014 Connie received the Workflow Management Coalition's globally recognized Marvin Manheim Award for influence, contribution, and distinction based on standout contributions to the field of workflow and business process management.