



HFS OneOffice™ Hot Vendors

Q3 2021

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Excerpt for PAteam

Executive summary

The HFS OneOffice™ Hot Vendors are an exclusive group of emerging players, each with a differentiated value proposition for the Digital OneOffice™ in Exhibit 1. HFS analysts regularly speak with numerous exciting start-ups and emerging players. We designate a select group as the HFS Hot Vendors based on their offerings' distinctiveness, ecosystem robustness, client impact, financial position, and the impact in our OneOffice Framework. The HFS Hot Vendors may not have the scale and size to feature them in our Top 10 reports, but they have the vision and strategy to impact and disrupt the market.

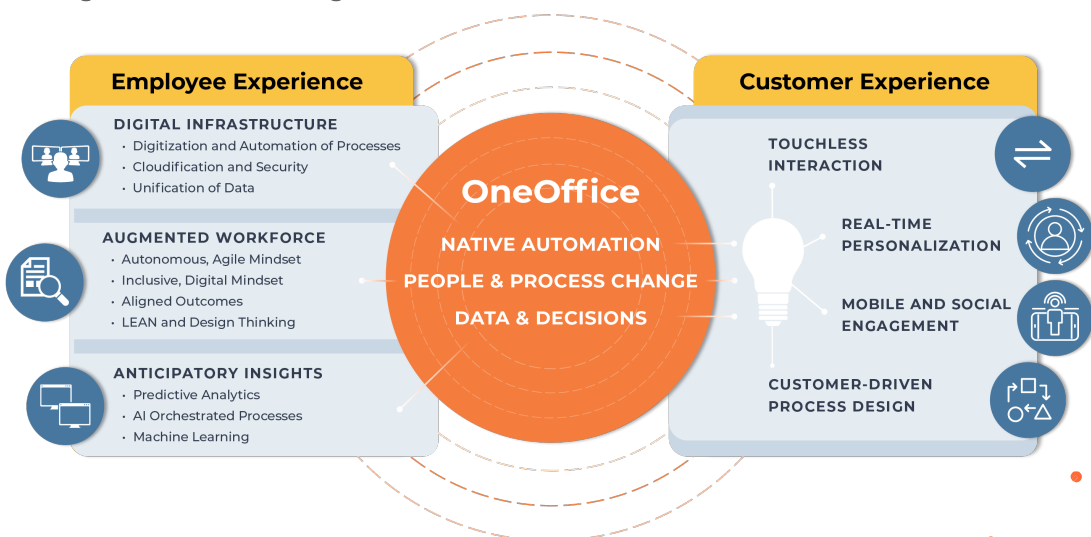
In the rapidly changing space of digital operations, enterprises realize they cannot be everything to everyone. Whether you are an enterprise consuming third-party services, a service provider, or a technology

provider, you will need a smart ecosystem to succeed and survive in the future. HFS Hot Vendors are service and technology providers hand-picked by our analysts to help you flesh out your smart ecosystem with offerings that solve today's complex business problems and exploit market opportunities. HFS Hot Vendors display truly differentiated offerings and out-of-the-box thinking that can be both inspiring and useful.

This report profiles seven short-listed players we designated as HFS Hot Vendors (listed in Exhibit 2) based on our rigorous five-step assessment during Q3 2021. The HFS Hot Vendor designation for the following players will remain in place until the end of Q3 2022 (one year), when we repeat the process for renewing the HFS Hot Vendors designation.

Exhibit 1

The HFS Digital OneOffice Organization










Source: HFS Research, 2021

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Exhibit 2

HFS OneOffice Hot Vendors Q3 2021 Edition (in alphabetical order)

-  What real low-code BPM looks like to customers
-  A partner-friendly approach to RPA that's not just for SMEs
-  Tech-packed low-code process automation platform for the enterprise
-  Migrating legacy databases and applications to the cloud
-  Making robots work, with a cut-through focus on NICE
-  Cloud-native platform that helps enterprises build, modernize, and mobilize core ERP applications
-  Enabling advanced employee experience solutions exclusively in Microsoft Teams

Note: The HFS Hot Vendor Designation is valid for one year from Q3 2021 to Q3 2022.

Source: HFS Research, 2021. Logos are hyperlinked

Making robots work, with a cut-through focus on NICE

Authors: David Cushman, Josh Matthews

PAteam is not your average robotic process automation (RPA) consultancy. It prides itself on bursting the hype bubble with a pragmatic approach to what can and can't be done with automation today and how that translates into outcomes. And, while it has established relationships with all the primary and usual suspects of RPA, PAteam's focus on attended automation and RPA vendor NICE makes it stand out when so many rivals fixate on "the big three" of UiPath, Automation Anywhere, and Blue Prism.

Founded in Israel in 2016 by a group of former NICE employees, the company is more than 45 people strong and has just reorganized with ambitions to scale to 150 people for a more global presence through additional geographic focus in Europe and the US. PAteam's track record so far includes supporting over 20 enterprises on their automation journeys with more than 8,000+ deployed bots. Customers include FedEx, Ikea, Deloitte, and Amdocs. The team recently won business with world-renowned university MIT, where it will deliver "robots-as-a-service"—effectively a managed service. CCO Martijn Zuiderbaan defines a robot as not just the automation but the whole infrastructure delivering the automation.

PAteam offers advisory services in implementing automation, drawing on industry best practices: strategy work, creating automation vision and identifying the ways of working that will best suit an individual client; technical know-how, combining deep knowledge of tools with focused internal R&D; training, tailored to organizational needs and ranging from the basic to expert education; and operations, including setting up centers of excellence (COEs), scaling the automation of repetitive work, and providing maintenance and ongoing support.

The business extended its partner network to include ABBYY and Hyperscience to provide options in the intelligent document processing (IDP) space. It turns to ABBYY for handling unstructured forms and invoicing and applies Hyperscience's intelligent character recognition (ICR) where necessary, such as handling high volumes of hand-written data. Its other alliance—beyond RPA players—is with AWS. It also works closely with companies such as ConvergeOne, Process Fusion, TM Group, ISG, and several other consulting firms, providing RPA services to them and their clients.

Like many “pure-play” RPA consulting firms, PAteam’s partnership-style relationships with its customers stand out. FedEx, the global logistics giant, sees PAteam as its main partner for its automation COE focused on customer experience automation, mostly attended automation augmenting customer experience (CX) agents (NICE’s sweet-spot). While FedEx uses other RPA (Automation Anywhere’s A360 is the corporate automation platform level, which PAteam played a key role in deploying; AssistEdge is another),

PAteam remains the go-to agnostic partner because of its honesty and judgment of the RPA market—what RPA can, cannot, should, and shouldn’t do—and finding risks and opportunities for expanding the automation program. The FedEx-PAteam relationship is deepening, and a roadmap is being developed to scale the already-proven value in quantitative efficiency (saving agents 30 to 120 seconds per case, processing 7,000–8,000 cases per month) and qualitative CX improvements.

HFS’ take

HFS has designated PAteam an HFS OneOffice™ Hot Vendor for its refreshingly hype-free approach to creating value with RPA and a NICE-leaning offering that brings some genuine differentiation to a market alive with the sound of marketing buzz for the likes of UiPath and Automation Anywhere. PAteam’s down-to-earth honesty gives enterprises confident guidance on their automation journeys. Its right-tool-for-the-right-job approach extends to the deployment of IDP in automation journeys and tailoring both CoEs and training to the on-the-ground needs of its clients.

PAteam is expanding and already boasts a range of big-name clients; it is actively Deepening these relationships and acquiring new customers leveraging the differentiation conferred by its NICE focus. PAteam has capability across RPA vendors; marrying its NICE focus with broader capabilities without diluting its strengths is certainly something to hone in on, especially as it expands into technologies beyond RPA across a range of powerhouse partnerships.

- **Founded:** 2016
- **Key executives:** David Amir (Co-founder and Co-CEO), Jigar Patel (Co-founder and Co-CEO), Martijn Zuiderbaan (COO), and Assaf Roth (COO)
- **Headquarters:** Ra'anana, Israel
- **Other offices:** United States, The Netherlands, Poland, the United Kingdom, and India
- **Funding source(s):** Private
- **Number of clients:** 20+
- **Number of employees:** 45+
- **Notable clients:** MIT, FedEx, IKEA, City of Seattle, Charter Spectrum
- **Technology:** In-depth knowledge of tools paired with an in-house R&D; strong relationship with RPA and cognitive automation vendors; process discovery, task mining and process mining; attended and unattended automation; IDP and AI/ML
- **Enablement:** Training tailored to the organization and resources to go from basic to advance
- **Operations:** Take over repetitive support and maintenance work, use scale and automation to efficiently maintain and support the operation

Solution portfolio

- **Consulting:** Sharing industry knowledge and best practices; advisory services in implementing automation
- **Strategy:** Setting automation vision and strategy, best-fit ways of working and setup
- **Industry coverage:** Global multinationals across industries, including world-leading university MIT
- **Alliances:** NICE, UiPath, Automation Anywhere, AWS, ABBYY, Hyperscience
- **Partners:** ConvergeOne, Beacon Hill Technologies, and Process Fusion

HFS Research authors (1/2)



David Cushman | Practice Leader

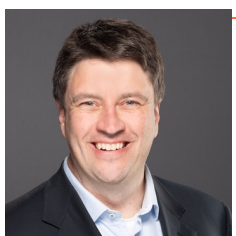
David is Editor in Chief for the HFS OneOffice Hot Vendor publications. He also leads our OneOffice Emerging Technology Practice and is our strategic lead on automation. David is a published author (*The 10 Principles of Open Business*, Palgrave-Macmillan) and a digital strategy and innovation expert with experience in start-up, scale-up, and large-scale digital transformation programs.



Martin Gabriel | Associate Practice Leader

Martin Gabriel is an Associate Director of Research at HFS, tracking global outsourcing deals in IT/BPO/Engineering services and supporting different practice leads in secondary research, data analysis, PoVs, and research writing.

Martin has more than five years of research, analytics, and market intelligence experience in TCS and Xchanging.



Joel Martin | Research Leader

Joel Martin is Research Lead for Cloud and SaaS Strategies at HFS. Joel's role is to aid organizations in making crucial decisions on designing, adopting, managing, and governing their growing portfolio of cloud solutions. Executives and business leaders will benefit from concise research on harnessing cloud-based solutions to support the workplace's rapid, fundamental changes.

HFS Research authors (2/2)



Josh Matthews | Practice Leader

Josh Matthews is a Practice Leader at HFS, based in Cambridge, UK. Josh leads HFS' coverage of sustainability and the energy and utilities industries, built on academic and industry expertise across chemical engineering, management, and sustainability. Josh also focuses on the supply chain, the TMT (telecom, media, and technology) industry, and automation, analytics, and AI segments. Other subjects of coverage include quantum computing and diversity and inclusion (D&I).



Melissa O'Brien | Research Leader

Melissa O'Brien is a Research Leader at HFS Research. Melissa leads HFS' research initiatives for CX services, including digital marketing and sales, contact center, and digital associates. In addition, her industry research focuses on key dynamics within retail, CPG, travel, and hospitality regarding customer-centric strategies, intelligent operations, and service delivery.



About HFS Research: Insight, Inspiration, Impact

HFS is a unique analyst organization that combines deep visionary expertise with rapid demand side analysis of the Global 2000. Its outlook for the future is admired across the global technology and business operations industries. Its analysts are respected for their no-nonsense insights based on demand side data and engagements with industry practitioners.

HFS Research introduced the world to terms such as "RPA" (Robotic Process Automation) in 2012 and more recently, the HFS OneOffice™. The HFS mission is to provide visionary insight into the major innovations impacting business operations such as Automation, Artificial Intelligence, Blockchain, Internet of Things, Digital Business Models and Smart Analytics.

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