Introduction – Risking Opportunity

At Continuity Logic, we find that the best feeling, in the world of business continuity, is being prepared for opportunities that exist when you can simplify operational risk. Solutions to important enterprise issues don’t have to be so complex and costly. Just imagine a platform that doesn’t even require a line of code!

Pick a sector here in the US or around the globe – banking, healthcare, insurance, media, manufacturing – you name it. Regulators have become unwelcomed extensions of management teams. They’re not going away. Too much is at risk (they fear) to let companies run their own show anymore...

As a result of the globalization of operations and a move towards digital business, companies risk losing their competitive edge if they wait too long on one key trend – making the shift from “static” planning to a “dynamic” platform.

Scenario: A cyber attack occurs or a natural disaster barrels through a major metropolitan area. A dynamic platform can create customized, real-time solutions as the incident unfolds and as events on the ground change.

Whether you’ve experienced it first-hand or have seen these issues on the news, companies like us are in this line of work to improve everyone’s lives, especially those who have to deal with risk management issues on a daily basis.

In the following edition of our Newsletter you’ll get to learn about why we do what we do and how it matters to you.

Source: Continuity Logic
Business Continuity as a Virtue

You’ve heard of Business Continuity Management Planning (“BCMP”), right? Would you agree that it is a key strategic imperative for companies to effectively compete in this new era of business? If so, here are some examples of how leading organizations rely on Continuity Logic in this capacity:

- Delivers full enterprise BCMP lifecycle management
- Provides unparalleled ease-of-use, speed of implementation, and ability to meet rapidly changing requirements
- Seamlessly connects BCP to risk and compliance without IT support
- Integrate easily with a wide range of other data sources and with complex enterprise GRC applications
- Rapidly creates and visualizes reports and dashboards

Can you relate to any of these attributes? Which ones do you want to learn about?

Listing our capabilities is far less powerful than showing you in person what can be done.

We emphasize the word “done” because our team at Continuity Logic has built a successful track record of customizing business continuity, risk, and compliance management software solutions. We don’t just talk about it.

Continuity Logic v5 Platform

Business Operations Platform for Enterprise Governance

Source: Continuity Logic
For us, it’s all about empowering simplicity, resiliency, and transformation so that companies can focus on innovation and stay ahead of the curve.

**The Gartner Effect and Who Really Cares**

Some people out there might take it lightly that a vendor in the BCMP universe has been consistently recognized by Gartner. For the first time, we are furthest to the right for “Completeness of Vision”. Instead of talking to us about it, we welcome you to talk with the ones that trust us most with their biggest risk challenges. We have seen exceptionally rapid growth in our business because of what we do really well today and how we think about potential challenges in the near future. We have found that our customers enjoy a partner that thinks beyond what they are retained to do.

To learn more about how we simplify all elements of business continuity governance across the full life cycle, contact Jim Holt at 216-469-6000 or jim.holt@continuitylogic.com.

Source: Continuity Logic
The BCMP software market — with a global market revenue estimate of $250 million — is broadening its capabilities and becoming closer to operational risk management solutions. Gartner’s Magic Quadrant on this growing market evaluates 13 vendors to help in your vendor selection process.

**Market Definition/Description**

There are many reasons why ensuring continuity of operations is being seen by organizations as a growing risk that needs to be managed and mitigated, including:

- Customer expectations for 24/7 operations
- Globalization of operations
- The move to digital business, including Internet of Things (IoT) devices and sensors that add a layer of complexity to business operations and disruptions
- The growing threat environment of all types — natural and man-made
- Growing pressure from regulators for better threat mitigation and compliance with existing regulations, as well as an increase in the number of regulations (including business continuity management (BCM))
- Enterprises increasing their reliance on systems of engagement and record to deliver sustained business value to customers; the ability to keep IT systems resilient against disruptions is becoming a key strategic objective
- The understanding by management that having a strong recovery and resilience capability can be a huge competitive advantage

As a result, many organizations are moving from the traditional respond-and-recover approach to business disruptions to an agile operational resilience posture. Business leaders are demanding broader participation in the BCM process to ensure increased confidence that recovery planning will lead to better outcomes. Therefore, more people need to be part of the BCM program; it requires working with key business leaders, engaging the non-BCM and nontechnical end user to provide the needed data and context of business operations, as well as aligning disparate organizational business disciplines into a cohesive process and initiative to develop appropriate and effective outcomes for continuity of operations and operational resilience — all with a shrinking budget.

Therefore, BCM is a board-level initiative that must be aligned to the organization’s strategic objectives, and BCM professionals must become business change agents of their organizations — they can no longer take a secondary operational role in managing a program that conducts recovery plan exercises and reports to the board of directors once a year. Because BCM has the complete operating picture of the organization, the BCM program can become the foundation of the operational resilience initiative. Today’s progressive BCM leaders accept these responsibilities, despite a higher frequency of unplanned threats and incidents.

To help them in the basic responsibilities of BCM, as well as to position themselves as business change agents, many are turning to the use of business continuity management planning (BCMP) software (hereafter referred to as BCMP software). These solutions enable organizations to manage their operational risks (many BCMP vendors now offer some core integrated risk management solutions [IRMS] capabilities) and resulting business impacts, plans and response activities needed to respond and recover from business disruptions as well as activities needed (e.g., trend analysis, status reporting) to manage the overall BCM program and move closer to operational resilience. Therefore, we will change the name of this market from “planning software” to “program solutions” in future research.

A well-executed BCM program captures large amounts of organizational data before, during and after a business disruption. These unstructured data points need to be mapped and managed to show a picture of the organization’s status and effectiveness of continuity of operations, as well as situational awareness during an incident. Rather than spending...
time on manual data entry, analysis and reporting from and to business unit personnel who are time-constrained and for whom BCM is not their primary responsibility, the core goal in using BCMP software is to spend more time on decision making and acting on those decisions, including:

- Facilitating cross-organizational business unit and IT participation in the BCM program so that availability risk is complete, transparent and agreed on by all parts of the business
- Understanding the status and disposition of the BCM program so that investments can be appropriately aligned with operational risks
- Quickly understanding the situational awareness of a business disruption in order to facilitate the organization’s preparations for incidents
- Effectively managing response, recovery and restoration activities when business disruptions occur

The critical capabilities of BCMP software center on providing business leaders with a more effective means of evaluating operational risks and business impacts, as well as planning for, responding to, recovering from and restoring after a business disruption. Gartner believes the optimal BCMP software is holistic in nature, addressing seven critical capabilities. In determining the effectiveness of the solution, each critical capability should be underpinned by the following specific attributes:

- **IRM Enablement:**
  - **Risk Management Discipline Support and Packaging:** Key evaluation criteria include native or third-party support for operational risk management; IT risk management; supplier risk management and contingency planning; emergency/mass notification services; IT disaster recovery/service continuity management (IT DR/SCM); crisis/incident management (C/IM); hazard alerting; and operational and regulatory compliance.
  - **Application Integration:** Key evaluation criteria include application integration methods; specific applications supported; data association mapping on import; and data validation on import.
  - **Risk Assessment for Availability:** Key evaluation criteria include risk methodology support; risk register; preloaded risk and control content; ease of risk rating algorithm customization; risk assessment completion navigation support; risk assessment over time; risk weighting support; and product/service, location, business process, etc., risk mapping and rendering options.
  - **Usability:**
    - **Ease of Configuration:** Key evaluation criteria include code-free changes; look and feel configuration; template (risk assessment, BIA, recovery plan) configuration; label/term changes; database object creation and management; page/screen updating support; and organizational hierarchy management support.
    - **Ease of Use:** Key evaluation criteria include administrative interface options; drag-and-drop support; help functionality; navigation wizards; search capabilities; and forward-typing selection.
    - **Ease of Reporting:** Key evaluation criteria include reporting architecture; custom report creation; extent of object inclusion; customer branding; alignment with dashboarding; and report scheduling and distribution options.
    - **Mobile Device Support:** Key evaluation criteria include device and HTML5 support; online/offline support; plan rendering options; depth of mobile device support for each BCMP component (e.g., risk assessment, business impact analysis [BIA], plan management, crisis management); interactive task tracking; emergency notification support; and security controls.
    - **BCM Planning and Program Management:**
      - **BIA:** Key evaluation criteria include preloaded business impact content; impact option flexibility; breadth and depth of impact analysis across all resources/assets; ease of impact analysis algorithm customization; BIA completion navigation support; peak volume support; critical time frame support; impacts over time; impact weighting support; maximum acceptable outage (MAO), recovery time objective (RTO) and recovery point objective (RPO)
support options, including manual entry and automatic calculation, backlog issue capture, gap identification, workforce scheduling and BIA rendering.

- **Workflow and BCM Project Management:** Key evaluation criteria include ease of creating and editing workflows; notification capability; rule engine for automated decision making and escalation; calendar population; and to-do lists and project management schedule (i.e., annual update reminders to review risk assessments, BIAs, recovery plans, etc.).

- **Dashboarding:** Key evaluation criteria include dashboarding architecture; extent of visualization; custom dashboard creation; extensiveness of object inclusion; customer branding and extent of drill-down functionality.

- **Resource/Asset Modeling and Dependencies:** Key evaluation criteria include object/resource/asset mapping depth; drill-down depth; gap identification; risk mapping to object; and dependency rendering options.

- **Recovery Plan Document Management:** Key evaluation criteria include recovery plan versioning and editing management; and template management, including global and local sections, navigation controls, content import support, document attachment support, approval support and plan rendering options.

- **IT DR/SCM:** Key evaluation criteria include depth of integration with IT operations solutions; IT service/application interdependency discovery and mapping; dashboard for tracking RTO/RPO actuals versus targets on an ongoing basis; and recovery exercise run book creation and maintenance.

- **BCM Program Management and Business Value Reporting:** Key evaluation criteria include reporting methods; dashboarding; BCM program status and effectiveness metrics; and key risk indicator monitoring.

- **BCM Execution:**
  - **Exercising and Crisis/Incident Management:** Key evaluation criteria include coordination, collaboration and communication options; interactive event tracking; what-if modeling support; exercise/event schedule creation; calendaring support; postexercise/event reporting with lessons learned; depth of task logging; adding new tasks during an exercise/event; task assignment and reassignment; exercise/event status tracking; conference calling support; geographic information system (GIS) support; situational awareness support; and hazards alerting support.

- **Emergency/Mass Notification (EMNS):** Key evaluation criteria include depth of native functionality and integration with third-party EMNS.

- **Product Architecture:**
  - **Security Controls:** Due to most BCMP implementations being in the cloud, organizations must ensure that the BCMP vendor provides a very strong security infrastructure for its cloud-based offering. Best practice for the BCMP product selection process is to conduct a security assessment of the product’s and hosting environment’s security controls. Key evaluation criteria include role management; access entitlements; password management; authentication; and encryption of data in transit and at rest (e.g., AES 256-bit encryption).

- **Application Development Architecture:** Delivering BCMP critical capabilities in a flexible and customer-configurable platform is dependent on the underlying architecture of the solution. Key evaluation criteria include application development approach; reporting capability; visualization support; workflow support; application integration methods; browser support; and service delivery options.

- **Customer Experience:** Key evaluation criteria include SLA and uptime commitment and performance; integrating customer requirements into future versions of the offering; user training; customer service options; customer relationship and services; customer satisfaction; and actual disaster management experience.
- **Operations**: Key evaluation criteria include staffing configuration; data center operations; data center formation; labor center operations audits; IT DR/SCM for hosted or hybrid service delivery options; data center security (physical and information); BCM; IT operations; and information security certifications.

BCMP software provides benefits by automating certain BCM program processes that are defined, communicated, and agreed on among stakeholders. BCMP software can help organizations that have not done this work to clarify and then standardize BCM program processes to the benefit of all in the organization.

There is no single best product for all organizations, but there are typically several “good fit” products for a specific set of requirements. Organizations should identify BCM program processes that are mature enough for automation or those they would like to be more standardized, and use these processes to define requirements for product selection. Use our definition and critical capabilities of BCMP software to develop appropriate requirements, and select vendors based on their support of your highest-value requirements.

Organizations wishing to deploy BCMP software must understand that the labor associated with policy development is significant. There are wide variations in the scope and functional capabilities of the current set of solutions.

BCMP software is typically not packaged as a suite for BCM program processes, although it offers additional modules for added IRMS functions. The main advantage, however, is the integration of the modules, data, and workflow. If an organization does not need correlated information from BCM, supplier/vendor risk, and contingency management or compliance management (as examples), then a best-of-breed vendor in one of these areas may be a better choice.

**The Future of the BCMP Software Market**

BCMP software is part of a growing category of IRMS focused on supporting a broader enterprise risk management (ERM) program, including operational risk (see Note 1). BCMP software is well-positioned to address not just availability risk, but also the broader set of operational risks.

Based on the Gartner 2015 Security and Risk Management Survey, 46% of surveyed organizations use BCMP software. Therefore, in the 2015 BCM Hype Cycle, we position the BCMP software market as climbing the Slope of Productivity along the Hype Cycle, and reaching early mainstream adoption. The detailed responses to the 2015 survey question, “Which of the following software tools is your organization using to monitor and/or manage its (BCM) program?” were:

- BCM planning software (i.e., risk assessment, BIA, plan management): 46%
- Emergency or mass notification services: 44%
- Crisis or incident management: 52%
- Hazard alerting services (e.g., weather, geopolitical, natural disaster, etc.): 37%
- Social media monitoring services: 32%
- We are planning to purchase software tools to monitor and/or manage the BCM program within the next 12 months: 3%
- We have not adopted or bought software tools to monitor and/or manage the BCM program: 3%

One thing to note is that the BCMP software market provides not just the planning capability, but also the crisis management capability. Therefore, we expect both markets to have more crossover functionality and more blurring of the lines between the two markets. In addition, as more BCMP software vendors integrate communications platform as a service (CPaaS) offerings such as Twilio, they will offer a near-complete BCM program software suite. What is missing — but some vendors are discussing for inclusion in their offering — is training and awareness capability. On that point, the use of gaming technologies is becoming a very effective way to train workforce members on BCM needs.
As more organizations recognize that BCMP software is a viable operational risk management solution (most already include some form of supplier/vendor risk management and contingency planning, as well as compliance management), they will start to expand the functionality and, therefore, the number of users of BCMP software. We see the majority of expansion in BCMP market revenue coming from two areas:

1. More users (meaning more overall annual subscription fees).

2. Operational risk management (ORM) solution replacement opportunities, when a full-fledged ORM solution is not needed. BCMP software can be used to address a subset of operational risk program. Greater utilization of BCMP software in this manner will ultimately lead to growth for BCMP software providers.

As we see the market maturing, most vendors are converging on a relatively similar feature set. The pattern on the Magic Quadrant itself suggests a market in which most of the vendors are offering customer-functional BCMP solutions and meeting the needs of their respective target markets. However, how they meet customer needs is based on a wide variety of application architectures. If your organization cares about ease of configuration and flexibility, then the BCMP software’s product architecture should become a key evaluation criteria in your BCMP software selection project.

One change in the BCMP market that Gartner is tracking is the number of BCMP vendors that integrate with ServiceNow — an IT operations solution — as well as the number of BCMP software solutions being built on top of ServiceNow, either by a consulting firm (e.g., Fairchild Consulting) or through an organization’s own development teams. The benefit of ServiceNow is that many firms are using it already for IT operations, and thus can automatically trigger an IT DR/SCM script from an IT DR/SCM plan housed in the BCMP recovery plan. Therefore, BCMP software based on the ServiceNow application development framework can be a market disrupter in the next three years.

The Vendor Strengths and Cautions in this Magic Quadrant cover the evaluation criteria for which a vendor is above or below average. We do not provide commentary on every evaluation criterion, nor on criteria for which a vendor’s capability did not stand out from the others. Where no commentary is provided, it should be assumed that the capability is adequate for most organizations’ needs. Refer to Methodology for This Magic Quadrant Completion1 for a detailed explanation of how this Magic Quadrant research was conducted.

**Guidance for the Magic Quadrant Analysis**

In regard to the vendor write-ups below, we provide analysis background for clearer understanding of the Vendor Strengths and Cautions for certain criteria, including:

- **Geographic Strategy**: This criterion focuses on the geographic regions that the vendor targets, multilingual support within the BCMP software, and the geographic diversity of company operations for customer call centers, management, and technical and professional services. This criterion does not include the vendor’s geographic diversity for the data centers that run the BCMP software. That criterion is under Operations.

- **Product or Service**: Because of the importance of the application development architecture in a BCMP software’s ease of configuration, we scored newer technologies higher than older technologies. We also highlight the application development architecture of each vendor in this research.

- **Sales Execution/Pricing**: We scored vendor pricing based on four user groupings: up to 100, 101 to 500, 501 to 2,500 and over 2,500. Also, we highlight the percentage of fees associated with each vendor’s typical BCMP implementation allocated to configuration and implementation services. This is an important evaluation criterion because it is indicative of how easy it is to configure the solution by the customer — a higher percentage means that more vendor intervention is required.

- **Customer Experience:**

  - We scored the SLA guaranteed by contract based on the median of 99.99%, which represents four minutes and 19 seconds of downtime per month. The median actual uptime (not guaranteed via contract) was 100%.

  - **Vendor Performance**: In the customer reference survey, we asked the references to provide feedback on the vendor’s overall performance
during presales, the sales process and the postsales relationship. This question did not include questions specific to the BCMP software capability. The questions in this section include:

- Ease of initial installation and setup of vendor’s BCMP software
- Experience with version upgrades
- Ease of use in development activities and ongoing support of vendor’s BCMP software
- Performance, scalability and/or throughput of vendor’s BCMP software
- Vendor’s product technical support and documentation
- Vendor’s professional services
- Vendor’s pricing method
- Vendor’s pricing strategy (actual cost of the BCMP software relative to its value)
- Quality and reliability of vendor’s sales team
- Vendor’s understanding of a particular industry vertical
- Vendor’s customer service support
- Vendor’s ongoing software development activities and innovation
- Vendor’s production performance to SLA
- Vendor’s backup/recovery/failover performance to SLA

Finally, the version of the BCMP software reviewed for this research is not always the current version. Given that release cycles in this market are shortening to, on average, four times per year, the vendor could have implemented a feature or service noted as missing or underperforming in its write-up in the current release.

Magic Quadrant
Vendor Strengths and Cautions
Avalution

Avalution is headquartered in Cleveland, Ohio. Its BCMP software evaluated for this Magic Quadrant was Catalyst 2015; the current version is Catalyst 2016. There are three versions of Catalyst, each having different customization and configuration options: (1) Enterprise, on a customer-dedicated platform (code customization by the vendor only); (2) Pro, on a shared customer platform (customer configuration to recovery plans, reports, fields and BIA; no code customization); and (3) Basic. Catalyst is a Ruby on Rails application. The product is offered in the following delivery models: shared multitenant, and multitenant with dedicated client application instance and dedicated client database instance. The industry sectors where it has at least 5% of its customers are: financial services (not including insurance); healthcare providers; government — state, local or regional; manufacturing — discrete and process; higher education; software publishers or developers; insurance; and IT service providers.

Strengths

- **Innovation**: Avalution has either added or enhanced the following innovative capabilities: ISO 22301:2012 is supported out of the box, an Insights report that shows strong status and gap reporting of all aspects of BCM planning built into the software, and geomapping of contacts and locations. The R&D investment as a percentage of revenue is high relative to other vendors.

- **Product or Service**: There is very strong support for IT DR/SCM management. Its Insights tool offers a business intelligence view of the BCM program.

- **Customer Experience**: Based on customer reference feedback, Avalution has one of the best vendor performance scores, from presales through implementation (this score does not include BCMP functionality).

- **Sales Execution/Pricing**: The vendor offers one of the best pricing models for under 100 users — the product is free to organizations with five or fewer users (which is corroborated with high customer reference scores for pricing strategy). Its typical percentage of a BCMP implementation allocated to configuration and implementation services is 10% — below the average of 23%.
Cautions

- **Offering/Product Strategy**: Operational risk analysis was not included in the core package.

- **Product or Service**: The application integration capability was limited to Excel/CSV imports at the time of the evaluation. Multilingual support is available, but the vendor charges for additional languages beyond its standard service pack.

- **Operations**: Avalution’s data centers are based only in the U.S.

**ClearView**

ClearView is headquartered in Oxfordshire, U.K. Its BCMP software evaluated for this Magic Quadrant was v.6.0; the current version is 6.2. The product is offered in the following delivery models: on-premises and multitenant with dedicated client application instance and dedicated client database instance, and dedicated hosting solution. ClearView is implemented in ASP.NET Framework 3.5 using C#. The industry sectors where it has at least 5% of its customers are: financial services (not including insurance); insurance; energy — oil and gas; telecommunications; utilities; transportation; higher education; government — federal, national or provincial; government — state, local or regional; and retail.

**Strengths**

- **Innovation**: ClearView has either added or enhanced the following innovative capabilities: migration tools for other BCMP software, as well as Excel/Word, etc.; “what if” reporting; the concept of a rolling incident; combined crisis and information security incident management and expenditure management into its C/IM capability; IT DR plans; geocoding of resources; and a nonconformance report that shows gaps in BCM functionality built into the software.
• **Product or Service**: What-if modeling is integrated with dependency mapping. ClearView is the only vendor to support the BlackBerry mobile device with a native app.

• **Customer Experience**: Based on customer reference feedback, ClearView has one of the best vendor performance scores, from presales through implementation (this score does not include BCMP functionality).

• **Sales Execution/Pricing**: Its pricing is one of the best, at above average for all user price points. Its typical percentage of a BCMP implementation allocated to configuration and implementation services is 10% — below the average of 23%.

Cautions

• **Offering/Product Strategy**: Operational risk analysis and supplier/third-party risk management required an additional investment over the core package pricing. The mobile device app was not interactive from a crisis management perspective.

• **Customer Experience**: ClearView’s professional services cost performance is lower than the median.

• **Innovation**: The R&D investment as a percentage of revenue is low relative to other vendors.

**Continuity Logic**

Continuity Logic is headquartered in Fairfield, New Jersey. Its BCMP software evaluated for this Magic Quadrant was FrontLine Live 5; the current version is 5.2. The product is offered in the following delivery models: hybrid, shared multitenant, and multitenant with dedicated client application instance and dedicated client database instance. FrontLine Live leverages Microsoft .NET and SQL server, and, as of this writing, is completely off SharePoint. It has a built-in reporting capability and HTML5 presentation. The industry sectors where it has at least 5% of its customers are: financial services (not including insurance); insurance; healthcare providers; media; health payer; government — state, local or regional; retail; and manufacturing — discrete and process. Its implementation size sweet spot over other vendors is for organizations with more than 25,000 employees that want strong BCM program management, C/IM and visualization.

**Strengths**

• **Market Understanding**: Continuity Logic has one of the best articulated positions for market understanding of how BCM fits into all other operational risk disciplines of the vendors in this Magic Quadrant.

• **Innovation**: Continuity Logic has either added or enhanced the following innovative capabilities: HTML5 presentation throughout the software; rule engine; dependency mapping; workflow; project management view, including a calendar view; application impact analysis (AIA); and a “Guide Me” wizard. ISO 22301:2012 is supported out of the box. Encryption at the field level is supported.

• **Business Model**: Continuity Logic is one of only three vendors that uses FedRAMP-certified data centers.

Cautions

• **Product or Service**: The mobile device app was not interactive from a crisis management perspective.

• **Sales Execution/Pricing**: The vendor’s typical percentage of a BCMP implementation allocated to configuration and implementation services is 27.5% — above the average of 23%.

• **Innovation**: The R&D investment as a percentage of revenue is low relative to other vendors.

• **Operations**: Continuity Logic’s data centers were based only in the U.S. at the time of this evaluation.

**EMC (RSA)**

RSA, The Security Division of EMC, is headquartered in Hopkinton, Massachusetts. Its BCMP software evaluated for this Magic Quadrant was version 5.5; the current version is 6.1. The product is offered in the following delivery models: on-premises, hybrid and shared multitenant only (no dedicated client application or client database). The product is developed using the Microsoft Internet Information Services (IIS) Web Server and Microsoft .NET Framework. The industry sectors that it has at least 5% of its customers in are: financial services (not including insurance); IT service providers; media; healthcare
providers; transportation; construction; insurance; energy — oil and gas; retail; government — federal, national or provincial; professional, scientific or technical services (not including IT); and telecommunications. An IRMS vendor, it has BCMP capability in addition to other risk management offerings. Due to EMC’s corporate compliance requirements, RSA did not provide answers to survey questions regarding revenue by year or region, or regarding new deal signings in 2014 or 2015. Therefore, we used Gartner’s internal Vendor Rating process to provide an overall financial viability score for RSA. Its implementation size sweet spot over other vendors is for organizations with more than 10,000 employees that want a strong IRMS solution with good BCM planning functionality.

Strengths

- **Innovation**: RSA has either added or enhanced the following innovative capabilities: geocoding of resources is supported; a new pricing model based on use cases; and ISO 22301:2012 is supported out of the box.

- **Product or Service**: Secure FTP is supported for data in motion.

- **Geographic Strategy**: RSA has one of the highest-rated geographic strategy scores for regions it targets for sales and for its own company geographic distribution for customer call centers, management, and technical and professional services areas.

Cautions

- **Business Model**: The only service delivery model supported is multitenant for both the application and the database.

- **Customer Experience**: RSA had one of the lowest overall customer reference scores (79% of the median score) and one of the widest varieties of reported problem categories for BCMP usage. Its professional services cost performance is lower than the median. It was the only vendor with customer references reporting that all their implementation challenges were product-related. RSA’s uptime guarantee of 99.5% (3.6 hours of downtime per month) was below the median of 99.99% at the time of this evaluation.

- **Offering/Product Strategy**: Key core BCMP capabilities, such as basic EMNS, supplier/third-party risk management, compliance management and business process mapping, required an additional investment over the core package pricing.

- **Sales Execution/Pricing**: The vendor offers one of the highest pricing models based on all user groupings (which is corroborated with low customer reference scores for pricing model and strategy). Its typical percentage of a BCMP implementation allocated to configuration and implementation services is 31% — higher than the average of 23%.

**Fusion**

Fusion is headquartered in Rolling Meadows, Illinois. Its BCMP software evaluated for this Magic Quadrant was Fall Release 2015; the current version is Spring Release 2016. The product is offered only in a multitenant delivery model. The product runs on the Force.com application platform as a service (aPaaS) development platform. The industry sectors where it has at least 5% of its customers are: financial services (not including insurance); retail; manufacturing — discrete and process; professional, scientific or technical services (not including IT); software publishers or developers; telecommunications; utilities; healthcare providers; and insurance.

Strengths

- **Market Understanding**: Fusion has one of the best articulated positions for market understanding of how BCM fits into all other operational risk disciplines of the vendors in this Magic Quadrant.

- **Customer Experience**: Based on customer reference feedback, Fusion has one of the best vendor performance scores, from presales through implementation (this score does not include BCMP functionality). The vendor had one of the highest scores for professional services performance.

- **Innovation and Business Model**: Fusion has either added or enhanced the following innovative capabilities: plan management with central control and local modification, database object relationship visualization, geocoding of resources, OSHA reporting, custom outputs, pricing for nonprofits, and a new pricing model
based on tiered users. Fusion has one of the best mobile device apps, as it is delivered in HTML5 and native formats, and offers access to all of the core BCMP software capabilities. It is one of only three vendors that uses FedRAMP-certified data centers.

- **Overall Viability**: Its average three-year revenue growth rate was one of the highest of all vendors in this Magic Quadrant.

**Cautions**

- **Sales Execution/Pricing**: Fusion offers one of the highest pricing models based on all user groupings.

- **Business Model**: Its only service delivery model is multitenant for both the application and the database.

- **Geographic Strategy**: The vendor’s customer service support is in the U.S. only.

**Global AlertLink**

Global AlertLink is headquartered in Charleston, West Virginia. Its BCMP software evaluated for this Magic Quadrant was v. 7.8.3; the current version is 7.9.2. The product is offered in the following delivery models: on-premises, hybrid, dedicated hosted solution, shared multitenant, and multitenant with dedicated client application instance and dedicated client database instance. The product is developed on the Microsoft .NET Framework. The industry sectors that it has at least 5% of its customers in are: financial services (not including insurance); transportation; healthcare providers; insurance; IT service providers; and manufacturing — discrete and process.

**Strengths**

- **Customer Experience**: Based on customer reference feedback, Global AlertLink has one of the best vendor performance scores, from presales through implementation (this score does not include BCMP functionality).

- **Innovation**: Global AlertLink has either added or enhanced the following innovative capabilities: dependency model; autopopulation of user attributes; context-sensitive help, “ToolTip”; workflow; guide for completion of tasks; geocoding of resources; and IT DR/SCM run books. The R&D investment as a percentage of revenue is high relative to other vendors.

- **Product/Service**: The application is FIPS 140-2-encryption-certified.

- **Operations**: Global AlertLink’s data centers have among the broadest geographic reach of all the vendors in this Magic Quadrant.

**Cautions**

- **Customer Experience**: Global AlertLink had one of the widest varieties of reported problem categories for BCMP usage.

- **Offering/Product Strategy**: The vendor did not provide a detailed solution roadmap due to confidentiality concerns.

- **Sales Execution/Pricing**: Global AlertLink did not provide responses for percentage of customers by geography or percentage of revenue by industry due to confidentiality concerns.

**LockPath**

LockPath is headquartered in Overland Park, Kansas. Its BCMP software evaluated for this Magic Quadrant was version 4.2; the current version is 4.4, Update 2. The product is offered in the following delivery models: on-premises, and multitenant with a dedicated client application instance and dedicated client database instance. The Keylight platform is a C# and Visual Studio application. The industry sectors where it has at least 5% of its customers are: healthcare providers; financial services (not including insurance); insurance; manufacturing — discrete; manufacturing — process; professional, scientific or technical services (not including IT); and retail. An IRMS vendor, it has BCMP capability in addition to other risk management offerings.

**Strengths**

- **Innovation**: LockPath has either added or enhanced the following innovative capabilities: its Bowtie reports for risk assessment; workflow; reporting; and its Keylight Ambassador tool for data importing.

- **Product/Service**: The application is FIPS 140-2-encryption-certified.

- **Overall Viability**: LockPath’s average three-year revenue growth rate was one of the highest of all the vendors in this Magic Quadrant.
Cautions

• **Innovation**: Geocoding of resources is not supported.

• **Offering/Product Strategy**: Key core BCMP capabilities, such as C/IM, basic EMNS, supplier/third-party risk management, compliance management, business process mapping and operational risk analysis, required an additional investment over the core package pricing.

• **Customer Experience**: LockPath is the only vendor that does not offer an uptime guarantee as part of its standard SLA, although it will if required by the customer.

**MetricStream**

MetricStream is headquartered in Palo Alto, California. Its BCMP software evaluated for this Magic Quadrant was MetricStream 6.0; the current version is 6.1. The product is offered in the following delivery models: on-premises, and multitenant with dedicated client application instance and dedicated client database instance. The product is built on the Java EE thin-client architecture. The industry sectors where it has at least 5% of its customers are: healthcare providers; financial services (not including insurance); insurance; state, local or regional; government — federal, national or provincial; higher education; business or consumer services; process manufacturing; and media. MetricStream is one of only two vendors that has plans to support IoT devices in BCMP planning (for example, sensors, video surveillance devices and others). An IRMS vendor, it has BCMP capability in addition to other risk management offerings.

**Strengths**

• **Geographic Strategy**: MetricStream has the largest geographic footprint of all the vendors in this Magic Quadrant, mainly through partners.

• **Innovation**: The vendor has one of the highest innovation scores. It has either added or enhanced the following innovative capabilities: database object relationship visualization; ComplianceOnline.com; “My Tasks” toolbar; synch to Outlook of tasks; Tableau integration; social governance, risk and compliance (GRC); cloud services management; and vendor-completed surveys for supplier risk management and contingency planning. ISO 22301:2012 is supported out of the box.

• **Market Responsiveness and Track Record**: MetricStream has one of the best processes for incorporating customer feedback into the product development life cycle.

• **Operations**: Its data centers have among the broadest geographic reach of all the vendors in this Magic Quadrant.

Cautions

• **Customer Experience**: Professional services cost performance and timeliness performance are lower than the median. MetricStream’s uptime guarantee of 99.5% was below the median of 99.99% at the time of this evaluation.

• **Offering/Product Strategy**: Key core BCMP capabilities, such as supplier/third-party risk management and compliance management, required an additional investment over the core package pricing.

• **Sales Execution/Pricing**: The vendor’s typical percentage of a BCMP implementation allocated to configuration and implementation services is 34.5% — above the average of 23%. MetricStream does not include supplier/vendor risk management contingency planning or compliance management functionality as part of its core BCMP software.

**Quantivate**

Quantivate is headquartered in Woodinville, Washington. Its business BCMP software evaluated for this Magic Quadrant was v.4.3, which is also the current version. The product is offered in the following delivery models: on-premises, and multitenant with a dedicated client application instance and a dedicated client database instance, and a dedicated virtual hosting solution. The product is developed using the LAMP stack plus Java. The industry sectors where it has at least 5% of its customers are: financial services (not including insurance); insurance; manufacturing — discrete and process; retail; and utilities. Quantivate did not provide information regarding percentage of customers by industry. The vendor has moved into the IRMS space.
**Strengths**

- **Customer Experience**: Quantivate had one of the highest vendor BCMP functionality satisfaction scores.

- **Innovation**: The vendor has either added or enhanced the following innovative capabilities: vendor management RTO and RPO, and vendor-completed surveys for supplier risk management and contingency planning; workflow; 3D charting; project management view; and database object relationship linkage.

- **Product/Service**: Quantivate offers very strong support for IT DR/SCM management.

- **Sales Execution/Pricing**: The vendor’s pricing model is one of the best (which is corroborated with high customer reference scores for pricing model), and it is strong across user groupings, except over 2,500 users. Its typical percentage of a BCMP implementation allocated to configuration and implementation services is the average of 23%.

**Cautions**

- **Operations**: Quantivate’s data centers are based only in the U.S.

- **Geographic Strategy**: Multilingual support was not available beyond its standard language of English.

- **Product or Service**: Application integration capability is very weak, and limited to the vendor’s custom import process.

- **Offering/Product Strategy**: Key core BCMP capabilities, such as compliance management, supplier/third-party risk management and operational risk analysis, required an additional investment over the core package pricing.

**RecoveryPlanner**

RecoveryPlanner is headquartered in Trumbull, Connecticut. Its BCMP software evaluated for this Magic Quadrant is version RPX 26.111; the current version is 27.115. The product is offered in the following delivery models: on-premises, hybrid, and multitenant with a dedicated client application instance and a dedicated client database instance. The product is written in Java. The industry sectors where it has at least 5% of its customers are: financial services (not including insurance); insurance; manufacturing — discrete and process; utilities; energy — oil and gas; healthcare providers; government — state, local or regional; higher education; IT service providers, and government — military.

**Strengths**

- **Market Understanding**: RecoveryPlanner has one of the best articulated positions for market understanding of how BCM fits into all other operational risk disciplines of the vendors in this Magic Quadrant.

- **Geographic Strategy**: The vendor has the largest geographic footprint of all the vendors in this research, mainly through partners. Multilingual support is available at no charge.

- **Innovation**: RecoveryPlanner has either added or enhanced the following innovative capabilities: The concept of risk user, guided wizards for product navigation, supplier risk management and contingency planning, DOCX migration, project management view, support for geocoding of resources, a personal mobile device app, remote wipe and touch ID on the mobile device app, and RPX University for training purposes. It is the only vendor in the Magic Quadrant with a continuity of operations (COOP)-specific module. ISO 22301:2012 is supported out of the box.

- **Sales Execution/Pricing**: Its pricing is one of the best, and is below average for all user price points (which is corroborated with high customer reference scores for pricing model and strategy). Its typical percentage of a BCMP implementation allocated to configuration and implementation services is one of the lowest of all vendors in this research, at 3%.

**Cautions**

- **Customer Experience**: RecoveryPlanner had one of the widest varieties of reported problem categories for BCMP usage. It had one of the lowest BCMP functionality customer satisfaction scores (85% of the median score).

- **Product or Service**: The product has limited automated ability to guide end users through recovery plan creation.
Strategic BCP
Strategic BCP is headquartered in Blue Bell, Pennsylvania. Its BCMP software evaluated for this Magic Quadrant was ResilienceONE v.7.1; the current version is 7.2. The product is offered in the following delivery models: on-premises, hybrid, single tenant with a dedicated client application instance and dedicated client database instance, and a customer-owned hardware hosting solution. ResilienceONE is written in ASP.NET and C# 4.5.1. The industry sectors where it has at least 5% of its customers are: healthcare providers; financial services (not including insurance); professional, scientific or technical services (not including IT); retail; and insurance. Revenue numbers were not provided, but the percent change year over year was provided.

Strengths

• **Customer Experience**: The vendor has one of the best vendor performance scores, from presales through implementation (this score does not include BCMP functionality). Strategic BCP had one of the highest vendor BCMP functionality satisfaction scores. It had one of the highest scores for professional services performance.

• **Innovation**: Strategic BCP has either added or enhanced the following innovative capabilities: workflow, Genome and IT DR/SCM. ISO 22301:2012 is supported out of the box. The R&D investment as a percentage of revenue is high relative to other vendors.

• **Product or Service**: The vendor offers among the best support for IT DR/SCM management, and all capabilities except basic EMNS are included in the core package.

• **Sales Execution/Pricing**: Strategic BCP’s pricing model is very strong for two user groupings: 501 to 2,500 and over 2,500 (which is corroborated with high customer reference scores for pricing model and strategy). There is no cost for BCMP implementation allocated to configuration and implementation services.

Cautions

• **Operations**: Strategic BCP’s data centers are based only in the U.S.

• **Innovation**: Geocoding of resources was not supported.

• **Geographic Strategy**: The vendor has limited geographic reach, primarily focusing on the U.S. and Canada.

Sungard Availability Services
Sungard Availability Services (Sungard AS) is headquartered in Wayne, Pennsylvania. Its BCMP software evaluated for this Magic Quadrant was Assurance Continuity Manager (AssuranceCM) Release 10; the current version is Release 13. The product is only offered in the multitenant delivery model with a dedicated client database instance per customer. The product is built using Microsoft .NET MVC (C#) with HTML5 presentation. The industry sectors where it has at least 5% of its customers are: financial services (not including insurance); insurance; healthcare providers; utilities; and telecommunications. Sungard AS is one of only two vendors that has plans to support IoT devices in BCMP planning (for example, sensors, video surveillance devices and others).

Strengths

• **Customer Experience**: The vendor has one of the best vendor performance scores, from presales through implementation (this score does not include BCMP functionality). It had one of the highest vendor BCMP functionality satisfaction scores. Although we do not consider 100% guaranteed uptime to be meaningful, Sungard AS has introduced contractual penalties if it cannot meet this SLA — a unique capability.

• **Innovation**: Sungard AS has either added or enhanced the following innovative capabilities: A capability to schedule screen configuration changes for a future date/time implementation, for later updating; support for geocoding of resources; plan visualization; and C/IM capability.

• **Product or Service**: Secure FTP is supported for secure application integration. The application is FIPS 140-2-encryption-certified. Multilingual support is available at no charge.

• **Sales Execution/Pricing**: Its typical percentage of a BCMP implementation allocated to configuration and implementation services is one of the lowest of all vendors in this Magic Quadrant, at 8%.
Cautions

- **Offering/Product Strategy:** There is no BCMP-specific mobile device app available.

- **Customer Experience:** The conversion of highly customized Living Disaster Recovery Planning System (LDRPS) implementations to AssuranceCM has been a problem for some customers.

- **Overall Viability:** Its average three-year revenue growth rate was one of the lowest of all vendors in this research.

**Virtual**

Virtual is headquartered in Budd Lake, New Jersey. Its BCMP software evaluated for this Magic Quadrant was Sustainable Planner 3.3; the current version is 3.4. The product is offered in the following delivery models: on-premises, hybrid, and single tenant with a dedicated client web server and database instance. Sustainable Planner is written using ASP.NET. It integrates with iDashboards for business intelligence and data visualization. The industry sectors where it has at least 5% of its customers are: discrete manufacturing; government — federal, national or provincial; healthcare providers; government — state, local or regional; financial services (not including insurance); insurance; higher education; professional, scientific or technical services (not including IT); and retail.

Strengths

- **Customer Experience:** Based on customer reference feedback, the vendor has one of the best vendor performance scores, from presales through implementation (this score does not include BCMP functionality). Virtual had one of the highest scores for professional services performance.

- **Innovation:** The vendor has either added or enhanced the following innovative capabilities: what-if modeling, support for geocoding of resources, enhanced dashboarding, Centers for Disease Control and Prevention (CDC) risk register, and Hazard Vulnerability Assessment (HVA) risk assessment templates. A self-assessment tool for Business Continuity Maturity Model is included within the BCMP software. The R&D investment as a percentage of revenue is high relative to other vendors.

- **Sales Execution/Pricing:** Its pricing model is very strong for the over-2,500 user grouping (which is corroborated with one of the highest customer reference scores for pricing strategy).

- **Business Model:** Virtual is one of only three vendors that uses FedRAMP-certified data centers.

Cautions

- **Innovation:** There is no BCM standard support for ISO 22301:2012.

- **Sales Execution/Pricing:** The vendor does not include dashboarding functionality as part of its core BCMP software.

**Vendors Added and Dropped**

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor’s appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

**Added**

- Virtual

**Dropped**

- BOLDplanning is now focusing on the small business market.

- Infused Solutions (previously COOP Systems) did not meet our inclusion criteria.

- eBRP Solutions declined to provide requested information for qualification purposes.

- Modulo is no longer pursuing sales focused on the BCMP market opportunity, and therefore will not be a factor in future BCMP purchase decisions. On this basis, Modulo no longer meets the inclusion criteria, and had been removed them from this research.

- Rentsys Recovery Services did not meet our inclusion criteria.
Inclusion and Exclusion Criteria

Inclusion in this Magic Quadrant was based on the following criteria:

- Meets the Gartner definition of a BCMP software defined in the market definition in the Market Definition/Description section of this research
- Is developed, sold and implemented in midsize, large and enterprise size organizations. BCMP software used exclusively for small businesses is excluded, as are value-added resellers and product distributors.
- Has been in production as of 1 June 2015
- Meets two of the three following criteria:
  - Has 15 customers in production over more than one industry sector
  - Must have obtained five new customers in the last 12 months
  - Must have annual revenue of $4 million from BCMP software, excluding consulting/implementation revenue and all other product offerings from the vendor

After reading this Magic Quadrant research, consider the merits of all the BCMP vendors we have reviewed. These vendors have met inclusion criteria that ensure their products and services will meet the needs of most buyers. However, don’t dismiss vendors that are not included here if they are a better match for your use cases. Give consideration to partnerships between BCMP and other vendors that are already in your portfolio.

The following vendors deserve an Honorable Mention in this research:

- BC in the Cloud, which is a new player in the BCMP market
- Fairchild Consulting, which has developed the first BCMP software using the ServiceNow platform
- Perpetuui, which provides a unique IT service availability management suite

Evaluation Criteria

Ability to Execute

Gartner analysts evaluate technology providers on the quality and efficacy of the processes, systems, methods or procedures that enable their performance to be competitive, efficient and effective, and to positively impact revenue, retention and reputation. Ultimately, technology providers are judged on their ability and success in capitalizing on their vision.

Product/Service: Core goods and services that compete in and/or serve the defined market. This includes current product and service capabilities, quality, feature sets, skills, etc. This can be offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria. What we will be specifically looking for here is the vendor’s ability to articulate how its BCMP software provides core BCM planning functionality, such as risk assessment, BIA, plan management, exercise and C/IM, as well as BCM program management reporting and analysis, IT DR/SCM, mobile device support for plan management and activation, project management, security controls, ease of use, product architecture, and ease of customization.

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 that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization’s portfolio of products. What we will be specifically looking for here is the vendor’s ability to articulate its financial position over three years (2013 to 2015), as well as performance across multiple industries and geographic regions.

Sales Execution/Sales Execution/Pricing: The organization’s capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel. What we will be specifically looking for here is the vendor’s ability to articulate its sales execution performance, as well as its pricing models and actual pricing.
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 to changing market demands. What we will be specifically looking for here is the vendor’s ability to articulate how it responds to market changes and the competition.

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, increase awareness of products and establish a positive identification in the minds of customers. This mind share can be driven by a combination of publicity, promotional, thought leadership, social media, referrals and sales activities. What we will be specifically looking for here is the vendor’s ability to articulate its marketing activities and brand depth and equity.

Customer Experience: Products and services and/or programs that enable customers to achieve anticipated results with the products evaluated. Specifically, this includes quality supplier/buyer interactions, technical support, or account support. This may also include ancillary tools, customer support programs, availability of user groups, SLAs, etc. What we will be specifically looking for here is the vendor’s ability to articulate its SLA and uptime guarantee, user group capability, help and user training, customer support and services, customer relationship management and satisfaction, and actual disaster management experience, plus the overall customer reference score and overall demo score.

Operations: The ability of the organization to meet goals and commitments. Factors include quality of the organizational structure, skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently. What we will be specifically looking for here is the vendor’s ability to articulate its organization model, leadership and staffing; release management, and data center operations.

Completeness of Vision
Gartner analysts evaluate technology providers on their ability to convincingly articulate logical statements about current and future market direction, innovation, customer needs and competitive forces, and on how well these statements map to Gartner’s position. Ultimately, technology providers are rated on their understanding of how market forces can be exploited to create opportunity for the provider.

<table>
<thead>
<tr>
<th>Evaluation Criteria</th>
<th>Weighting</th>
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<tr>
<td>Product or Service</td>
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<tr>
<td>Overall Viability</td>
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<tr>
<td>Sales Execution/Pricing</td>
<td>Medium</td>
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<tr>
<td>Market Responsiveness/Record</td>
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<tr>
<td>Marketing Execution</td>
<td>Medium</td>
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<tr>
<td>Customer Experience</td>
<td>High</td>
</tr>
<tr>
<td>Operations</td>
<td>High</td>
</tr>
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Source: Gartner (July 2016)

Market Understanding: Ability to understand customer needs and translate them into products and services. Vendors that show a clear vision of their market listen to and understand customer demands, and can shape or enhance market changes with their added vision. What we will be specifically looking for here is the vendor’s ability to articulate the BCMP software market customer needs, drivers, opportunities, challenges and future view.

Marketing Strategy: Clear, differentiated messaging consistently communicated internally, externalized through social media, advertising, customer programs and positioning statements. What we will be specifically looking for here is the vendor’s ability to articulate its communications and brand awareness.

Sales Strategy: The strategy for selling products 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. What we will be specifically looking for here is the vendor’s ability to articulate its partnerships in selling its BCMP software, as well as its global sales strategy.
**Offering (Product) Strategy:** An approach to product development and delivery that emphasizes market differentiation, functionality, methodology and features as they map to current and future requirements. What we will be specifically looking for here is the vendor’s ability to articulate its BCMP product roadmap, software development and deployment, and its suite delivery model.

**Business Model:** The design, logic and execution of the organization’s business proposition to achieve continued success. What we will be specifically looking for here is the vendor’s ability to articulate its reason for being in the BCMP software market, service delivery options, implementation support and consulting service capability.

**Vertical/Industry Strategy:** The strategy to direct resources (sales, product, development), skills and products to meet the specific needs of individual market segments, including verticals. What we will be specifically looking for here is the vendor’s ability to articulate its coverage across multiple industries.

**Innovation:** Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes. What we will be specifically looking for here is the vendor’s ability to articulate its R&D investment levels, product design, and depth of coverage within and outside of the BCMP software market, as well as what it deems to be innovative in its own offering.

**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. What we will be specifically looking for here is the vendor’s ability to articulate its coverage across multiple geographic regions, as well as language support for multiple geographies.

**Quadrant Descriptions**

**Leaders**
Leaders have products that work well for Gartner clients in midsize and large deployments. As firms, they excel in the combination of market understanding, product features and functions, and overall viability. Their BCMP software may be well-known to clients and frequently found on RFP shortlists, and they have a presence at tradeshows.

**Challengers**
Challengers have competitive visibility and execution success that is better-developed than Niche Players. Challengers offer all the core features of BCMP, but typically their vision, roadmaps, and/or product delivery or component mix are narrower than those of Leaders. Challengers may have difficulty communicating or delivering their vision in a competitive way outside their core industry sectors.

**Visionaries**
Visionaries make investments in broad functionality and platform support, but their competitive clout, visibility or market share don’t reach the level of Leaders. Visionaries make planning choices that will meet future buyer demands, and they assume some risk in the bargain because ROI timing may not be certain. Vendors that pursue visionary activities will not be fully credited as Visionaries if their actions are not generating noticeable competitive clout, and are not influencing other vendors. In general, companies that have very good vision and execute strongly become Challengers or Leaders.

<table>
<thead>
<tr>
<th>Evaluation Criteria</th>
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<tr>
<td>Market Understanding</td>
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<td>Innovation</td>
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<tr>
<td>Geographic Strategy</td>
<td>Medium</td>
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</table>

Source: Gartner (July 2016)
**Niche Players**

A Niche Player ranking is assigned when the product is not widely visible in competition, and when it is judged to be relatively narrow or specialized in breadth of functions and platforms. A Niche Player may also be a vendor whose ability to communicate vision and features does not meet Gartner’s prevailing view of competitive trends. BCMP Niche Players include stable, reliable and long-term players. Some Niche Players work from close, long-term relationships with their buyers, in which customer feedback sets the primary agenda for new features and enhancements. This approach can generate a high degree of customer satisfaction, but also results in a narrower focus in the market (which would be expected from Visionaries).

**Context**

A BCM program, properly implemented and managed, will protect employees, organizational assets, external stakeholders, organizational integrity, organizational equity, reputation and brand. A BCMP software solution, properly implemented and managed, is a major advantage for both new and mature BCM programs, because it enables organizations to respond more quickly, more completely and more efficiently, ultimately improving equity and reputation, and saving the organization money. More complex organizations — those that are geographically dispersed, those with multibusiness units and business lines, and regulated organizations — benefit the most, because the solution can manage BCM program data for each location, business process, IT resource, etc., and then bring it together at the enterprise level for business decision-making purposes. Done well, the program management information that you can easily report on is valuable for managing a complex program. In addition, small and midsize enterprises — especially those with little to no in-house resource with BCM knowledge — can benefit from BCMP software because it provides a structured and consistent approach to implementing a BCM program.

The basic benefits of using BCMP software include:

- Having a structured and consistent approach to performing and reporting on availability risk assessments and BIAs
- Having a common repository for organizational resources (e.g., IT, workforce, suppliers/vendors, equipment, vital records, facilities) that can be leveraged for consistency across all BCM program activities
- Having a structured and consistent approach, as well as a common repository, that saves time in developing, updating and managing recovery plans and teams
- Providing a consistent method for developing and managing exercises and their results
- Identifying and managing gaps/nonconformities in recovery requirements
- Effectively reporting to every level of the organization on the trends and status of the BCM program, whenever required
- Having a real-time and interactive capability when responding to an actual crisis that logs all activity for evidentiary purposes

Additional benefits of using BCMP software include:

- Leveraging recovery data for moving the organization forward on its path to higher levels of maturity and operational resilience.
- Managing recovery site workspace and resource usage and effectiveness and investment for oversubscription or undersubscription, or duplication of or minimal use
- Tracking BCM program awareness and education performance
- Providing an ongoing knowledge base of the BCM program within the organization so that organizational changes do not derail the effective management of continuity of operations throughout the organization.

Overall, using BCMP software allows organizations to:

- Break down organizational silos so that a consistent and comprehensive approach to availability risk management and BCM is applied.
- Provide better visibility about availability risk to executive management and the board of directors.
- Make better business and risk management decisions.

**Market Overview**

The BCMP market has matured and improved since the last Magic Quadrant, especially in crisis management functionality, and has grown broader in IRMS functionality:
• The greatly improved crisis management functionality is a realization that a time of
disaster is when all the planning efforts come
together — if you have good plans in place,
then the transition to an actual crisis event
can be smoother, especially when using crisis
management automation. Also, the high
adoption of mobile devices is facilitating a
more comprehensive and complete response
approach. Using a mobile device app means
that recovery team members can execute their
recovery duties from the field. This is especially
important when you have a geographically
dispersed operational footprint of people,
facilities and equipment, or when you are
responsible for customer outages, as is the
case with insurance claims processors, utility
workers and first responders. In future, the
crisis management functionality will be used to
support crisis events involving the IoT devices,
including notifying people in the area of the
device failure.

• The growth in IRMS functionality beyond BCM
in pure-play BCMP software is due to the
customer base recognizing that the value
of risk management is the key driver to resilience
and competiveness. As organizations work
to build an IRMS portfolio, many are aligning
the BCM program with a broader ERM/ORM
program. As a result, we are seeing ERM
function as the latest “home” for the BCM
program. See “Members of the Association of
Contingency Planners Report on ‘What Keeps
Them Up at Night’” for the results from a 2015
survey Gartner conducted with the association’s
membership. Further in support, organizations
need the ability to embrace risk rather than
avoid it. Organizations today are not fully
prepared to deal with the inevitable and wide
variety of disruptive events that the future will
bring — the average maturity of BCM programs,
as measured using Gartner’s ITScore for BCM
maturity self-assessment tool, is 2.45 on a scale
of 1 to 5.2

Other major improvements across all BCMP
vendors include ease of use, ease of configuration,
supplier/vendor risk management and contingency
planning (due to complex supplier networks),
and IT DR/SCM, as well as enhancements to
the mobile device app for real-time, interactive
crisis management, enhanced business analytics,
enhanced solution navigation guidance for
improved and streamlined project management
through the use of work steps and workflow
that can be crafted to meet the specific user’s
needs based on their role assignment within
the BCMP software, rule engine support for
processing all types of activity, application
integration, and enhanced refined access
controls so that customers can create roles that
have very detailed access to database fields/
objects, entitlements and functions within the
BCMP software. Workflow has become much
more sophisticated and configurable in order to
automate business continuity plan creation, review
and approval across all key business processes,
assets and facilities, as well as for use in the crisis
management process. Finally, the presentation
of recovery and resilience, as well as situational
awareness data, requires strong visualization in
order for users to comprehend the information in a
much easier manner.

The source of revenue for BCMP software vendors
is almost twice as high in the U.S. (93%) compared
to Canada (57%), Europe (50%), the U.K. (43%), the
Asia/Pacific region (other than Japan; 36%), and
Central and South America (46%). The Middle East
and Africa each represent 14% of revenue source.
These figures align with the vendors’ geographic
priorities: the U.S. is the first priority, Canada is
second, and the U.K. and Europe are third. Many
of the vendors sell into other geographic regions:
12 vendors sell in the Asia/Pacific region, 11
vendors sell in the Middle East and Central and
South America, seven vendors sell in Japan, and six
vendors sell in Africa. Russia is a growing area for
sales also for a few vendors.

There is not a strong vertical industry product
orientation for BCMP software due to the maturity
of the practices for the BCM profession as
developed through regulations such as the FFIEC
Business Continuity Planning Handbook, generics
standards such as ISO 22301 and ISO 22317, and
professional certification organizations such as
BCI, DRII and ICOR. Rather, the differences are
seen in the drivers of each industry to have a BCM
program and, therefore, the use of BCMP software
(e.g., regulation, supplier management, safety
and others). The one place where an industry
orientation is seen within BCMP software is in the
compliance functionality: Does the vendor support
the regulations or standards with which your
organization needs to or wants to comply? The
industries with the highest percentage of adoption
of BCMP software usage are financial services, not
including insurance (79%); healthcare providers
(71%), insurance (71%) and utilities (50%).
The top buyer for BCMP software continues to be the business continuity manager. This role is also reflected as the top owner of the BCMP software, as reported in the customer reference survey results. The second most likely buyers are a business executive, an HR manager or an IT DR/SCM manager. Facility managers and supply chain managers are both the third most reported buyer roles.

The motivation for customer references buying BCMP software is primarily driven because their current BCM plan management approach was not adequate for their needs (46%). The desire to mature their BCM program is the second motivation (21%) and the complexity of plan management no longer supports a manual management approach (13%) is the third.

Customer references reported the importance of the following factors when choosing the final vendor from the shortlist of BCMP vendors:

- BCMP software functional capabilities: 6.6
- Demonstrated understanding of our business needs: 6.4
- Expected performance and/or scalability: 6.3
- Relevant industry experience: 6.1
- Innovative capabilities: 6.1
- Pricing model and/or overall total cost of ownership: 6.1
- Operational/business-IT risk management experience: 5.8
- Viewed as a strategic partner: 5.8
- Quality of response to request for proposal or presentation of capabilities: 5.7
- Project implementation methodology: 5.6
- Conformity to our technical standards: 5.5
- Perceived viability and/or financial strength: 5.5
- Good feedback from customer references: 5.4
- Proven successful implementation at peer organizations: 5.3
- Vendor offered a portfolio of other complementary solutions, such as operational risk management, emergency/mass notification services or C/IM: 5.0
- Our own previous experience with the product: 3.6
- We already used other solutions from vendor: 3.0

Although there is no such thing as a “typical” BCMP implementation, the average deployment will have three to six customer resources assigned to the project team to help with the following areas: project management, organizational BCM program expertise, business unit representation, IT liaison for solution architecture and infrastructure (especially for source of record integrations), and information security. Business unit representation is vital because they may only access the system once or twice a year (for BIA or a plan update), so the solution has to be clear and simple to get their buy-in.

Customer references reported that their top factors when choosing a BCMP vendor are:

1 (Top) BCMP software functional capabilities
2 Demonstrated understanding of our business needs
3 Expected performance and/or scalability
4 Pricing model and/or overall total cost of ownership
5 Relevant industry experience

As we did last year, we analyzed only vendor-hosted/SaaS-based BCMP software pricing; some vendors offer on-premises pricing, but the majority of implementations are vendor-hosted/SaaS-based. BCMP vendor-hosted/SaaS-based pricing is a mix of options, including module pricing, full and read-only user pricing, head count pricing, setup fees, and training fees — thereby making price point comparisons between vendors more complex than many other software products. Implementation fees are common, especially for application integration and product configuration that the buyer does not want to do itself. Training fees apply for on-site training from most BCMP vendors. All vendors offer free online training; a few others include it as part of their initial setup/implementation.
We computed the pricing score using the following two components:

- **Pricing model**: This includes the number of modules that are priced separately (see Note 2), user pricing complexity, unique pricing options and pricing incentives, such as multiyear discount, industry discount, nonprofit pricing and small or midsize business pricing. A vendor was given a lower score if it had more complex pricing.

- **Price point comparison**: This is the average pricing based on the number of users of the BCMP software. The more above the median price point the vendor was, the lower its score in this component.

This year, we broke out implementation costs from product pricing in order to raise the importance of this pricing category when looking at the total cost of ownership for the first year. This category includes implementation fees such as setup, training, configuration and recovery plan migration, as well as the percentage of a typical deal — which average 23% — allocated to professional services for product configuration and implementation services. The higher the percentage, the lower the score, because it can indicate that the BCMP software is not as customer-configurable as another solution, or that it is overly flexible and requires more assistance from the vendor.

The median deal size of the pure-play BCMP vendors has gone up slightly between 2013 and 2015 ($50,000 and $55,000, respectively), in many cases due to the BCMP software being provided to more users within the organization as the customer uses more of the functionality in the solution (e.g., crisis management, risk assessment, supplier risk management and contingency planning). The following list provides median and average pricing examples for the detailed user groupings (read-only users are not included) used in the vendor survey and resulting analysis:

- Up to 10 users (1 to 500 employees) — median price: $21,045; average price: $18,820
- 11 to 25 users (501 to 1,000 employees) — median price: $22,795; average price: $25,691
- 26 to 50 users (501 to 1,000 employees) — median price: $27,907; average price: $29,811
- 51 to 100 users (1,001 to 3,000 employees) — median price: $37,000; average price: $43,571
- 101 to 250 users (1,001 to 3,000 employees) — median price: $38,262; average price: $54,012
- 251 to 500 users (3,001 to 5,000 employees) — median price: $55,000; average price: $69,769
- 501 to 1,000 users (5,001 to 10,000 employees) — median price: $60,000; average price: $78,334
- 1,001 to 2,500 users (5,001 to 10,000 employees) — median price: $69,750; average price: $87,068
- 2,501 to 5,000 users (10,001 to 30,000 employees) — median price: $80,940; average price: $127,660
- 501 to 1,000 users (5,001 to 10,000 employees) — median price: $60,000; average price: $130,883

It must be noted that, on average, 23% of the total implementation cost comes from professional services required to configure or customize the software for customer-specific BCM needs. It is extremely rare for a BCMP software tool to have to be customized for the customer — meaning that code changes are required to provide the required functionality. When using professional services for their BCMP implementation, 45% of customer references used the vendor’s professional services team and only 9% used a third party professional services provider. However, 43% of customer references used no professional services at all for their implementation.

The mean time to implement a BCMP software solution is 6.21 months, according to customer references. After implementation, 39% of customers spend five hours to less than 20 hours per month managing the solution, while 37% spend 20 hours or more per month. The two most commonly integrated BCM technologies with BCMP software are EMNS (62%) and third-party C/IM solutions (23%). As the crisis management functionality in BCMP software becomes more complete, there will be less need to integrate with these external solutions.

Customer references reported their biggest challenges to implementing the BCMP software as:
• Product/Vendor: There was a product-related or vendor workforce issue (48% of customer references).

• Company Process/Product Alignment: The complexity of the customer’s BCM process and/or its alignment to the BCMP software, the latter often because the BCMP software was also complex and offered a blank slate (39% of customer references).

• Company Politics/Resource Management: Customer politics around product usage or resource commitment (20% of customer references).

• Training: Customers that explicitly stated training, but it could not be aligned to the above categories (9% of customer references).

As reported in the customer reference survey results, the multitenant SaaS deployment model is the most common type of implementation (45%), with 41% of customer references reporting they use an off-premises deployment of the software hosted by the vendor or a third party (on dedicated hardware and software) for their organizations’ implementation. Only 5% of customer reference implementations are for an on-premises deployment.

Forty-five percent of the customer references reported that they are now using different BCMP software from what they started out using. Fifty-six percent reported they converted from SunGard AS LDRPS (a BCMP software solution the vendor purchased from Strohl Systems in 2008 that is no longer offered by SunGard AS and has been replaced with its AssuranceCM offering, evaluated in this Magic Quadrant). Twenty-eight percent reported they used another BCMP software solution, 12% reported that they had a homegrown solution that outgrew its viability and 4% reported that they used office automation.

The majority of training on the use of BCMP software has moved to free online media, with component-specific modules, such as “Here’s How to Develop a BIA Template,” FAQs, videos, self-paced tutorials, online live instruction and documentation. On-site training is offered by some vendors, especially by those whose products are more complex to configure. Train-the-trainer modules are the norm for end-user training required by the customer, because almost every implementation has been configured to support the specific needs of the customer’s BCM program. In regards to product training documentation, vendors whose products are more complex provide customized documentation to the customer. In this Magic Quadrant, we negatively scored these vendors as an indication of the complexity of the underlying solution itself.

**Evidence**

Methodology for This Magic Quadrant Completion: As part of the vendor survey conducted for this Magic Quadrant, we asked each vendor to identify five reference customers. These customers’ comments were derived from more than 50 BCMP surveys completed between October 2015 and November 2015. Vendors’ placement in the Magic Quadrant also was influenced by our discussions of BCMP software with Gartner clients and non-Gartner clients.

All 13 vendors featured in this Magic Quadrant completed a survey in which they provided: (1) information about their business and operational strategies; (2) an overview of their capabilities and how they align with the inclusion and evaluation criteria; and (3) their most important financial, sales and operational data.

Vendors were evaluated as if they were responding to an RFP, and they were ranked on their ability to document and qualify their strengths and features. It is important to remember that a Magic Quadrant does not solely rate product quality or capabilities and features; it also indicates Gartner’s view of a vendor’s overall position in a specific market. Although product portfolio was an important consideration in our assessment, a vendor’s ability to acquire customers and expand its presence in the market also was deemed important, as was its ability to increase its product revenue. A vendor that offers a strong, technically elegant product, but that is unable or unwilling to devote funding and attention to marketing and sales to increase revenue and improve profitability, will find itself unable to invest in future product development.

In addition, each vendor conducted a detailed briefing about and demonstration of its BCMP software. Each vendor was rated on its ability to conduct an effective briefing and demonstration, based on the provided critical capabilities defined in the vendor survey as well as in the market definition/description section of this research. These ratings were used to substantiate and, in some cases, where inadequate customer reference data existed, to supplement the overall product ratings.
ITScore for Business Continuity Management: Gartner provides a BCM maturity self-assessment tool to all Gartner clients. The results noted in this research represent 854 end users who completed the self-assessment through December 2015.

**Note 1. How Gartner Defines Enterprise Risk Management (ERM)**

Gartner defines true ERM as “the strategic and holistic treatment of all organizational risks, including credit and market risks, as well as operational risks”. Gartner defines operational risks as those risks that relate to the uncertainty of daily tactical business activities, as well as risk events resulting from inadequate or failed internal processes, people or systems, or from external events (aka availability risk).

**Note 2. BCMP Software Pricing Modules**

- Core system fee
- BIA capability
- Risk assessment for availability capability
- Core recovery plan capability
- Exercise management capability
- Crisis/emergency/incident management capability
- Supplier/vendor risk management and contingency planning
- BCM program analysis and reporting
- Dashboarding
- Operational risk management/IRMS capability
- EMNS capability
- Single sign-on
- Mobile device app
- Application integration platform and fee for development per integration point

**Evaluation Criteria Definitions**

**Ability to Execute**

**Product/Service:** Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

**Overall Viability:** Viability includes an assessment of the overall organization’s financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization’s portfolio of products.

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

**Market Responsiveness/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 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 initiatives, 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, service-level agreements and so on.

**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 to 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 website, advertising, customer programs and positioning statements.

**Sales Strategy**: The strategy for selling products 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 sets 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 vertical markets.

**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.

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About Us

Continuity Logic connects everyone-to-everything from BOD to frontline workers and from governance to business objectives and performance. We’re an innovation leader for enterprise continuity, risk, and compliance management software. Our Global2000 customers selected us for our unparalleled ease-of-use, speed-of-implementation, and abilities-to-meet rapidly changing requirements. Our solutions eliminate GRC complexity.

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