

The Forrester New Wave™: Low-Code Platforms For Business Developers, Q4 2017

The 13 Providers That Matter Most And How They Stack Up

by John R. Rymer

October 23, 2017 | Updated: October 23, 2017

Why Read This Report

In Forrester's evaluation of the emerging market for low-code platforms for business developers (BDs), we identified the 13 most important providers in the category — Caspio, FileMaker, FlowForma, Intellect, Kintone, KiSSFLOW, MatsSoft, Microsoft, Nintex, Pulpstream, Quick Base, Vizru, and Zudy — and graded them on a curve using a three-point scale. This report details how each vendor scored on 10 criteria and where they stand in relation to each other. Use this assessment to select the right low-code platform for your business developers.

Key Takeaways

Leaders: Quick Base, MatsSoft, And Caspio

Forrester's research uncovered a market in which Quick Base, MatsSoft, and Caspio lead the pack. Microsoft, Nintex, FlowForma, FileMaker, KiSSFLOW, Zudy, and Pulpstream offer competitive options. Kintone and Vizru offer strong options for niches, while Intellect lags behind.

AD&D Pros Seek To Empower Business Experts With These Products

Low-code platforms for business developers are gaining traction because more business and AD&D leaders see these products as an additional way to address their needs for software. The platforms are effective for a wide range of use cases and both large- and small-scale apps. Some AD&D leaders adopt these products for use by their developer teams as well.

Vendor Ambition, Functional Scope, And Support Distinguish These Products

The leading vendors are investing to address a broad range of enterprise applications; others are more narrowly focused. The Leaders also offer platforms strong in both database and process use cases, and they offer the widest range of training and adoption support services.

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with [Christopher Mines](#), Allison Vizgaitis, and Peggy Dostie

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[The Forrester Wave™: Low-Code Development Platforms For AD&D Pros, Q4 2017](#)

[How To Harness Citizen Developers To Expand Your AD&D Capacity](#)

[Vendor Landscape: A Fork In The Road For Low-Code Development Platforms](#)



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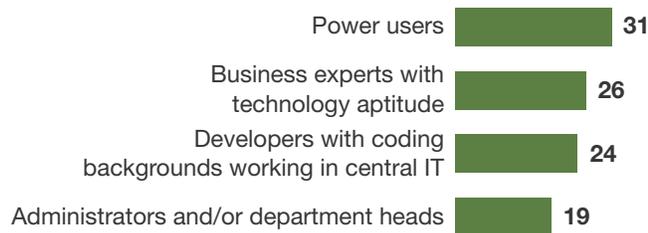
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Low-Code Platforms To Harness Your Business Developers

When businesspeople can't get the automation they need to carry out their missions, they build software tools and apps themselves. They have been doing so for decades, typically relying on unmanaged spreadsheets, desktop databases, and, more recently, collaboration and website tools. Low-code development platforms for business developers offer a managed and more productive environment for this inevitable software-delivery activity, with tools designed specifically for business experts rather than professional software developers.¹

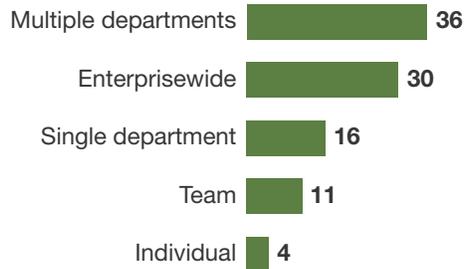
Vendors of low-code platforms for business developers design and sell to businesspeople, not AD&D pros. Vendors in another segment of the low-code development platforms market seek to appeal to AD&D pros.² Surprisingly, though, many AD&D teams themselves use these products to deliver apps, in addition to supporting businesspeople using the platforms (see Figure 1). This means that low-code vendors that focus on business developers will compete with vendors that focus on low-code for AD&D pros.

FIGURE 1 Low-Code Platforms For Business Developers Are Often Used By Developers And At Scale**“Describe the people that deliver applications using the low-code platform.”**

Source: Forrester's Q4 2017 Global Low-Code Development Platforms For Business Developers Customer Reference Online Survey

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FIGURE 1 Low-Code Platforms For Business Developers Are Often Used By Developers And At Scale (Cont.)**“What is, or will be, the scale of applications your organization develops using your low-code platform?”**

Source: Forrester's Q4 2017 Global Low-Code Development Platforms For Business Developers Customer Reference Online Survey

Why Companies Buy Low-Code Platforms For Business Developers

Low-code development platforms for business developers help enterprises achieve several important outcomes. The platforms:

- › **Provide business developers with more expressive power.** Spreadsheets and desktop databases are limited. Low-code platforms bring tools to address workflow, mapping of information in external sources, and mobile app capabilities.
- › **Place business-developer activities on a platform managed by technical staff.** AD&D pros handle access controls and security, perform platform upgrades, scale up applications, and offload other technical concerns from business developers.
- › **Empower underserved teams to self-serve automation in tune with AD&D strategy.** In most enterprises, operations teams in sales, marketing, field service, supply chain, and retail are underserved by central AD&D. Their choices to obtain automation have been either to buy packaged apps or contract with a consultant for custom apps. Now they have a third option.
- › **Raise the productivity of both AD&D pros and line of business developers.** Pro developers select low-code for business developers when: 1) the platforms are the quickest option and 2) the use case doesn't warrant the cost of either coding or low-code for AD&D pros. Line of business developers usually select low-code platforms for BDs rather than platforms for AD&D pros.

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Low-Code Platforms For Business Developers Evaluation Overview

The target customer — business developers and power users — drove our approach to this evaluation. We rewarded simple and direct developer experiences and products that are easy to access and adopt, requiring sales engagements at the customer's discretion. Further, we gave higher scores to products that can address multiple use cases. Products and vendors focused on niches scored lower, but that does not mean their products are poor.

We used 2-hour briefings and reference-customer surveys to rate these products, using 10 assessment criteria, and ranked them on a three-point curve. Possible grades were, from highest to lowest, Differentiated, On par, and Needs improvement (see Figure 2, see Figure 3, and see Figure 4).

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FIGURE 2 Assessment Criteria

Criteria	Platform evaluation details
Startup experience	Does the platform provide a singular, simple, straightforward initial development metaphor for business developers? If multiple experiences are supported, are they simple and direct? Is the on-boarding experience straightforward, including transparent pricing and costs? Are training/help materials easily accessed and readily apparent?
User interface development	Does the platform provide full control without coding over UX, including screen layouts based on different devices and screen resolutions? Does the platform provide forms support via declarative tools: rich range of controls, easy inclusion of third-party controls, anonymous forms, multicolumn forms, nested subforms, wizard-driven forms? Does the platform provide tools to create UX logic without coding?
Data management	Does the platform provide declarative tooling to create a single virtual, “visual” view of multiple data sources, with full support for create, read, write, and update operations? Does the platform automatically map data from multiple data sources into a coherent virtual data model with full support for CRUD operations? Does the platform provide data modeling tools appropriate for business developers? How much effort must business developers expend to work with familiar data files and sources within the platform?
Digital process automation	Does the product provide a declarative workflow development experience? Does the workflow experience address events and notifications? Does the workflow-development experience make document collaboration straightforward? Is the vendor’s integration solution well integrated with its workflow-development experience?
Reporting and analysis	Does the product create dynamic reports and visualizations that app users can modify at runtime and use to perform analysis? Does the platform include a built-in data warehouse or similar mechanism to support analysis applications? Does the platform provide OOTB reports and dashboards on usage, performance, and operations? Does the platform provide declarative/visual tools for creating custom queries, reports, and dashboards?
AD&D support and governance tools	Does the vendor provide tools that let pros in application development and/or IT organizations manage global permissions; see which apps are deployed and understand their usage of platform resources and/or data; manage deployed apps; and institute development life cycle policies, sandboxes, and other guardrails? Does the platform provide an enterprise store, launch site, or similar features for distributing apps? Does the platform provide QA and/or performance tools pro developers can use to optimize apps created by business developers?
Cloud platform attributes	Does the platform provide a self-service public cloud edition priced appropriately for business developer consumption? Does the public cloud platform offer security certifications, including PCI Level 1, and annually updated SOC 2 Type II, FedRAMP, HIPAA, and EU Privacy Shield? Local data residency options? Does the platform provide prebuilt applications, sample apps, components, and/or templates to support development projects?

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FIGURE 2 Assessment Criteria (Cont.)

Criteria	Platform evaluation details
Vision	<p>How well does the product vision align with the need for its clients to win, serve, and retain customers?</p> <ul style="list-style-type: none"> • Does the three-to-five-year vision support top-line (revenue- and growth-generating) business outcomes for clients? • Does the vision enable great customer centricity/customer experience? • How well does the vision align with current customer trends and future customer needs? • Is the company identifying and addressing competitive threats? • Does the product/service vision have support and visibility from senior executives?
Road map	<p>How strong is the company's execution road map?</p> <ul style="list-style-type: none"> • How strong is the company's ability to define specific time frames, milestones, and benchmarks in its strategy? • Does the company have a near-term (~one year) plan to execute on its vision in areas such as product enhancements, innovation strategy, commercial model enhancements, and partner ecosystem expansion? • Does the company have the resources and capabilities to deliver on its stated road map?
Market approach	<p>Is the company executing a successful go-to-market approach? Can the company show tangible evidence of a successful approach to customers today, in terms of:</p> <ul style="list-style-type: none"> • Revenue growth marketing messages • Vertical market strategy • Geographic strategy • Account momentum/growth • Commercial model

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FIGURE 3 The Forrester New Wave™: Low-Code Development Platforms For Business Developers, Q4 2017

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Low-Code Development Platforms For Business Developers

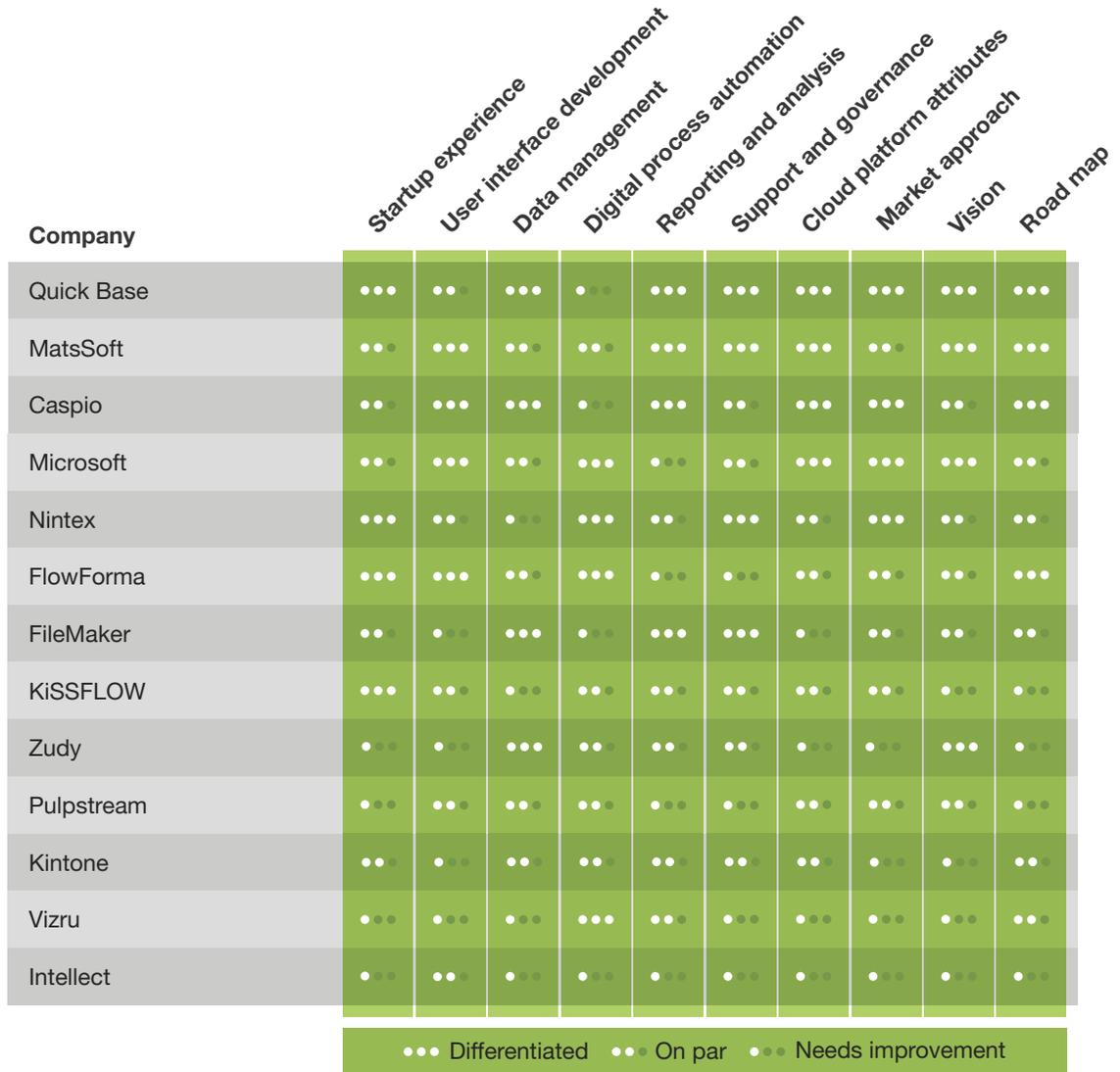
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FIGURE 4 Vendor QuickCard Overview



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Quick Base: Forrester’s Take

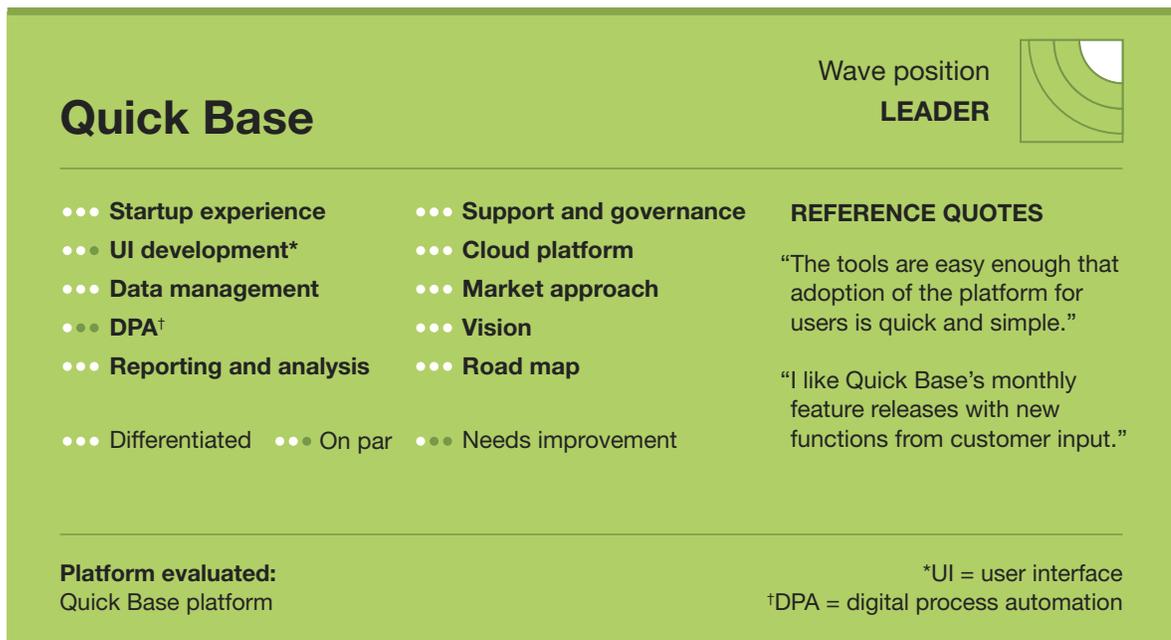
Our evaluation found that (see Figure 5):

- › **Quick Base offers rich startup experiences and strong data management.** Quick Base provides plenty of data power made accessible by well-designed tools and automation. The vendor offers free entry points for novices to experts, backed by ample help and resources.
- › **Its mobile UX and workflows fall short.** Quick Base doesn’t yet offer responsive design, which makes mobile UX development clunky. And to automate business process, developers work with data triggers and notifications; there is no process designer.
- › **It lets business pros build everyday data apps.** Quick Base allows business pros to build and sustain everyday data-intensive apps. People currently use tedious spreadsheets and desktop databases; Quick Base gives them more power and runs apps on a managed, scalable platform.

Quick Base Customer Reference Summary

Quick Base allows users to become productive within a day or two and create operations applications quickly. Feature feedback is excellent, even for process features.

FIGURE 5 Quick Base QuickCard



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MatsSoft: Forrester’s Take

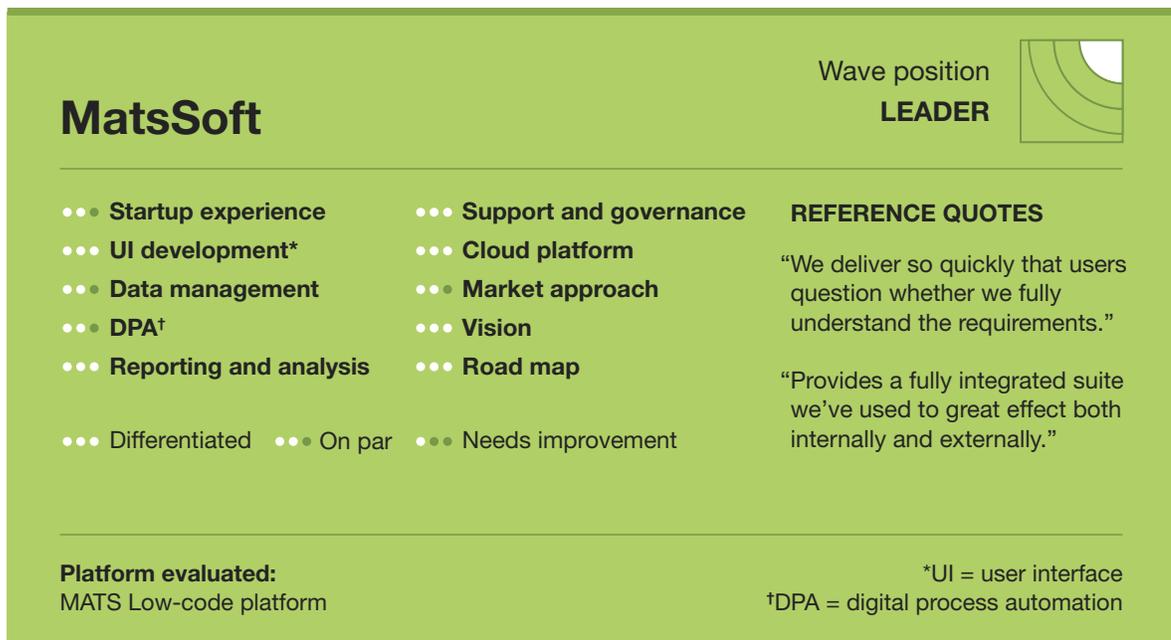
Our evaluation found that (see Figure 6):

- › **MatsSoft has long experience nurturing business developers.** MatsSoft makes everything it’s learned about empowering business developers readily available in its startup experience. UX development, data management, and AD&D support features are very strong.³
- › **Its BPMN process tools and startup experience are average.** A solid platform for data-intensive and process apps, MatsSoft doesn’t have glaring weaknesses. But the vendor’s BPMN2 notation will be too complex, and its startup experience uninspiring, for some.
- › **It’s a comprehensive platform from an experienced partner.** Turn to MatsSoft to activate a serious business-developer lead application delivery strategy supported by AD&D pros.

MatsSoft Customer Reference Summary

Customers credit MatsSoft’s breadth of features as well as tools and resources to help businesspeople quickly attain proficiency, if not mastery, of the platform.

FIGURE 6 MatsSoft QuickCard



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Caspio: Forrester’s Take

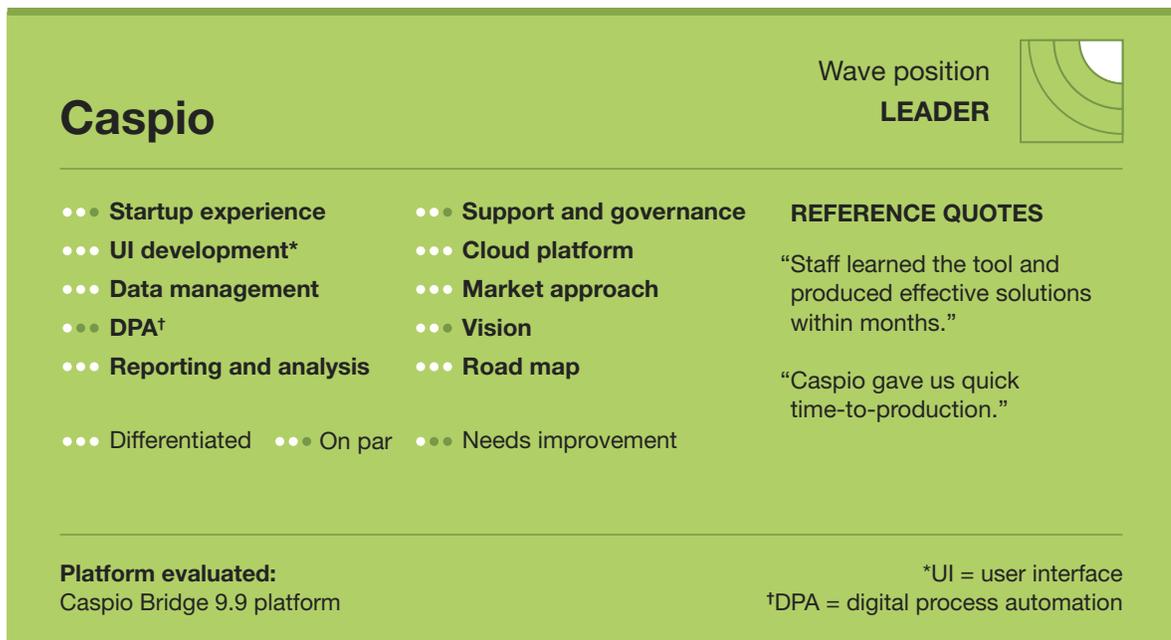
Our evaluation found that (see Figure 7):

- › **Caspio offers strong data management, startup, and adoption features.** Caspio’s core is data management, web experiences, and reporting, which business developers activate via Q&A tools and wizards. Startup experience is strong and includes adoption assistance.
- › **It has no process designer.** To automate business process, developers link actions on forms (triggers are on the road map); there is no process designer.
- › **It helps businesspeople create data-intensive web apps.** Caspio equips business experts to build and evolve data-intensive applications for customer interactions as well as for internal operations. Web and responsive-design mobile are supported.

Caspio Customer Reference Summary

Customers praise Caspio’s UI, data management, and reporting; they cite workflow as a gap. Customers advise organizing to manage the many apps Caspio allows users to create.

FIGURE 7 Caspio QuickCard



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Microsoft: Forrester’s Take

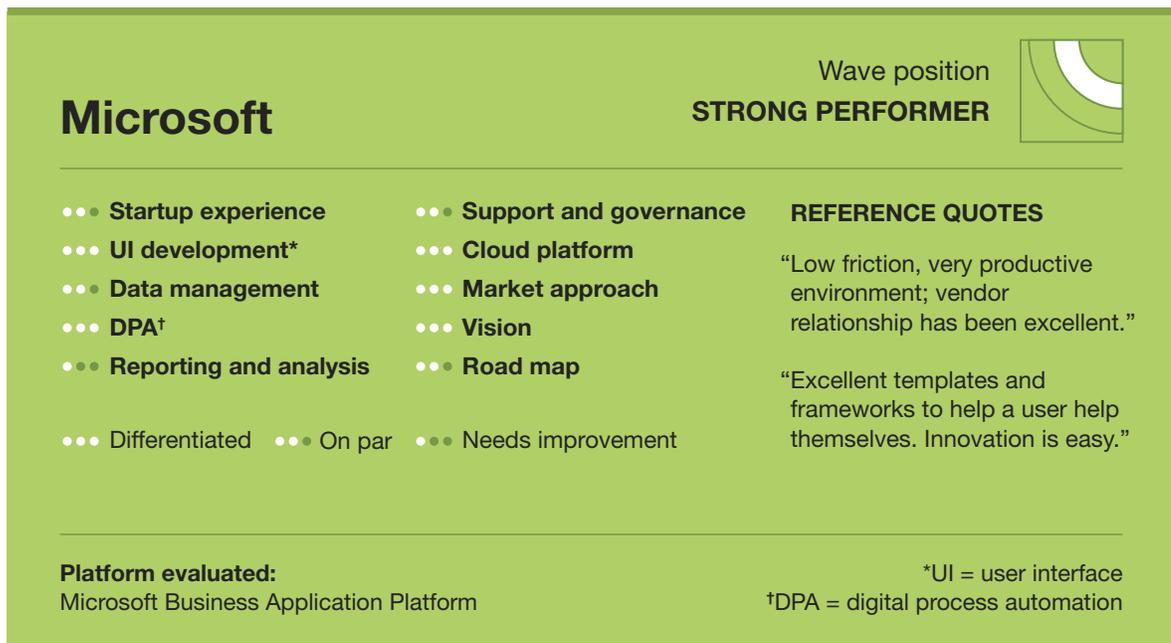
Our evaluation found that (see Figure 8):

- › **Microsoft has the broadest strategy.** Microsoft’s strategy is to serve BDs and all other dev types with tailored experiences founded on common platform technology. All devs consume and provide assets to all other devs. Success will be groundbreaking.
- › **Its product dependencies are a weakness.** PowerApps and Flow are strong, but some features either require use of another product (SharePoint, Power BI) or are on the road map (full realization of Common Data Services). Calibrate accordingly.
- › **It’s a logical extension to Microsoft products and skills.** PowerApps and Flow are standalone tools, but they have obvious value empowering business developers to extend Office 365, Dynamics 365, OneDrive, and SharePoint 2016, which are included.

Microsoft Customer Reference Summary

Customers praise Microsoft’s templates and tools generally, and those for user experience specifically, as well as the responsiveness of Microsoft support.

FIGURE 8 Microsoft QuickCard



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Nintex: Forrester’s Take

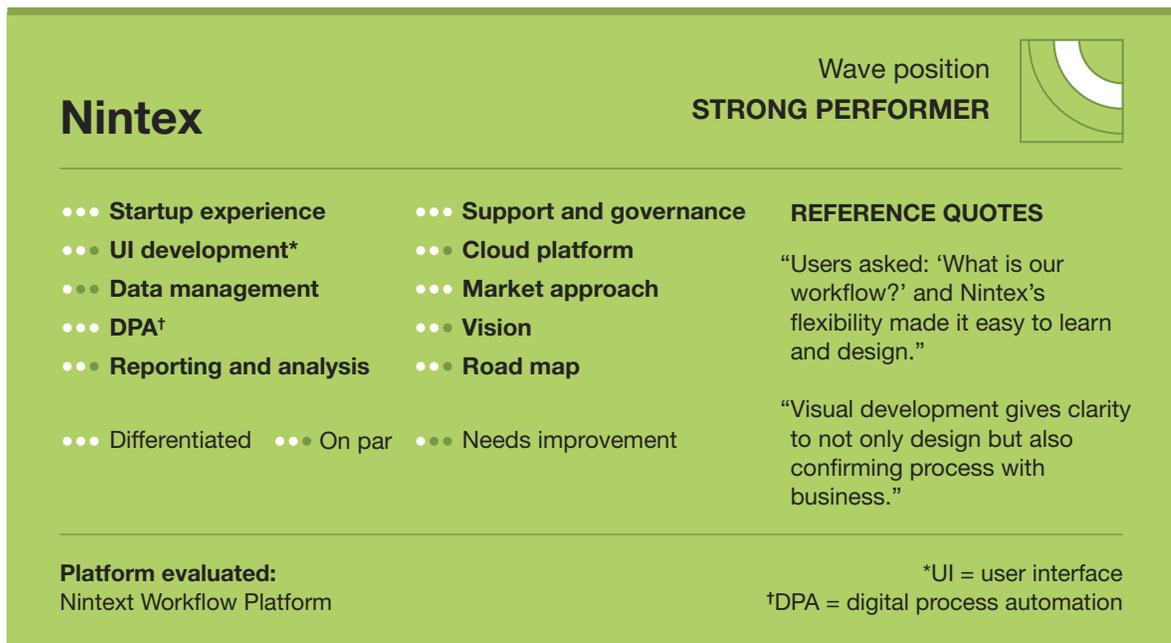
Our evaluation found that (see Figure 9):

- › **Nintex has a strong process platform and startup experience.** Processes are the core of Nintex; the tooling is rich and flexible, uses responsive design, and builds in integration. Startup is free, takes minutes, and aids work with in situ help and learning.
- › **Users can’t expect strong data management.** Nintex is one of the best process tools in this assessment, but it offers only basic data management features. Platform extensions and tools for data-intensive applications are on Nintex’s road map.
- › **It’s a powerful front-office process automator.** Nintex allows business experts to automate and evolve front-office processes both small and large very quickly. The vendor integrates well with Office 365 and SharePoint but has independent value.

Nintex Customer Reference Summary

Front-office processes abound yet are not well understood. Nintex’s platform is flexible enough to let business experts design, debate, and test their way to solutions.

FIGURE 9 Nintex QuickCard



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FlowForma: Forrester’s Take

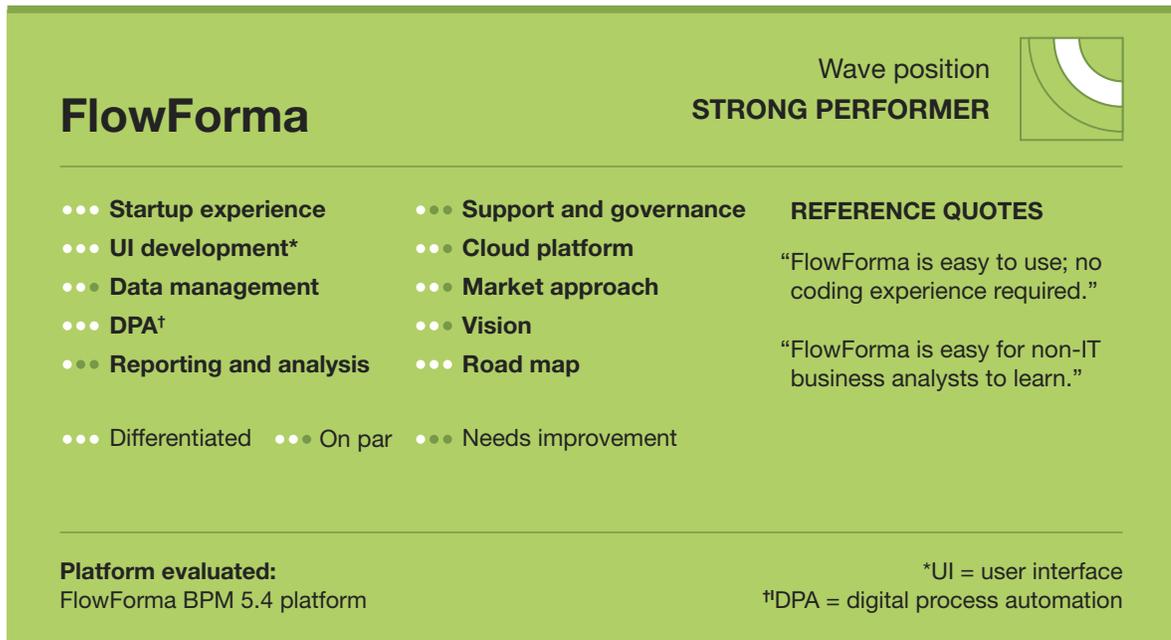
Our evaluation found that (see Figure 10):

- › **FlowForma boasts an easy on-ramp and rich process tools.** FlowForma has a strong startup experience, with aids for adoption and customer success. Users answer questions during forms design to define data, including rules and triggers. Integration is built into the process designer.
- › **It has data limitations and SharePoint dependency.** Data models are implied from forms; reporting is only on processes. Thus, it may fall short on data-management needs. FlowForma requires Microsoft SharePoint for document storage and user management.
- › **It creates process apps on Office 365 foundation.** Relying on Microsoft Office 365 for productivity and sharing? FlowForma is a strong — and proven — alternative to Microsoft’s various tools for mostly internal workflow/business process automation.

FlowForma Customer Reference Summary

Customers value FlowForma’s commitment to no code, but they note reporting and integration challenges. FlowForma earns high marks for responsiveness and customer support.

FIGURE 10 FlowForma QuickCard



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FileMaker: Forrester's Take

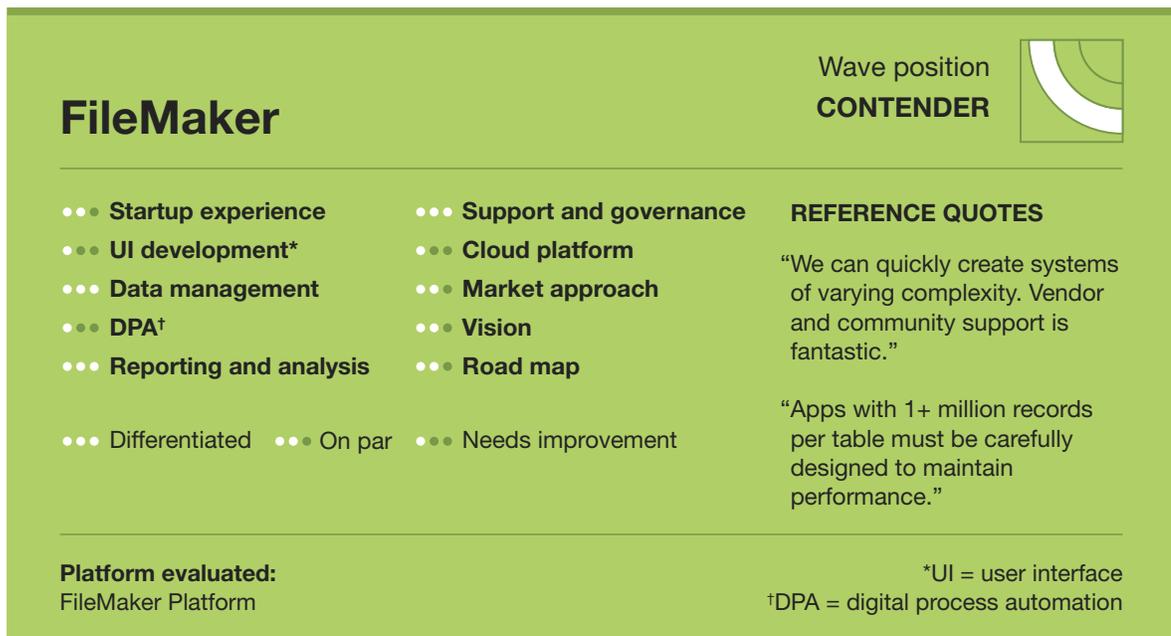
Our evaluation found that (see Figure 11):

- › **FileMaker controls data, from desktop database to low-code platform.** FileMaker has proven strengths in helping businesspeople gain control of data; those features are its foundation as a low-code platform. High scale is possible, but big databases require careful design.
- › **Process modeling is not available.** Businesspeople can define processes only through actions linking forms, created using scripts. FileMaker does not include a process modeler. REST integration is on the road map.
- › **It's all about your data.** FileMaker is strong for data-intensive applications and retains its historically strong reporting and publishing features. Don't rely on FileMaker for responsive-design web and mobile applications and process modeling.

FileMaker Customer Reference Summary

FileMaker's ease of use allows quick startup and time-to-value for business experts. Data management is excellent. Exercise caution on scaling and licensing for web use cases.

FIGURE 11 FileMaker QuickCard



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KiSSFLOW: Forrester’s Take

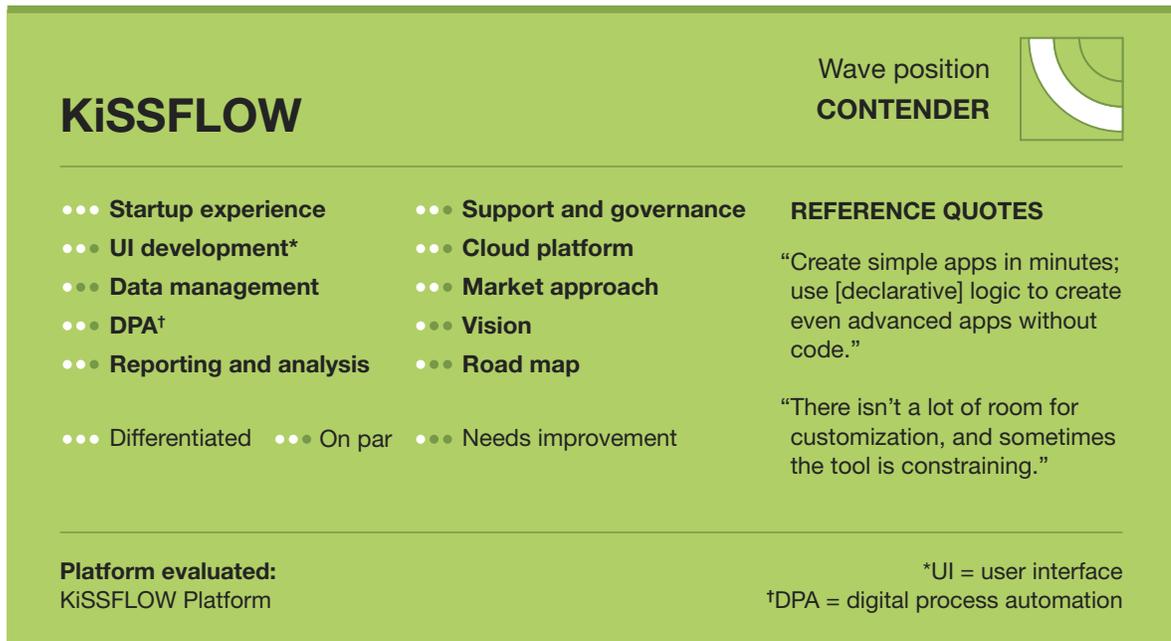
Our evaluation found that (see Figure 12):

- › **KiSSFLOW takes an innovative development approach.** KiSSFLOW weaves together forms/ UX creation, data and process definitions, integration, and reporting into a unitary and dynamic experience. The startup experience is excellent, with good AD&D tools provided.
- › **Data operations and workflow are limited.** KiSSFLOW’s data management applies to individual applications; creating a cross-app logical data view is difficult. Process development is easy but deliberately constrained by the development experience.
- › **Use KiSSFLOW for departmental and team apps.** It’s not applicable for big, complex enterprise use cases; still, BDs using Excel and email to propel processes today will automate much more deeply with KiSSFLOW.

KiSSFLOW Customer Reference Summary

Customers advise carefully matching use cases to KiSSFLOW’s framework and tooling, particularly for process automation projects.

FIGURE 12 KiSSFLOW QuickCard



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Zudy: Forrester’s Take

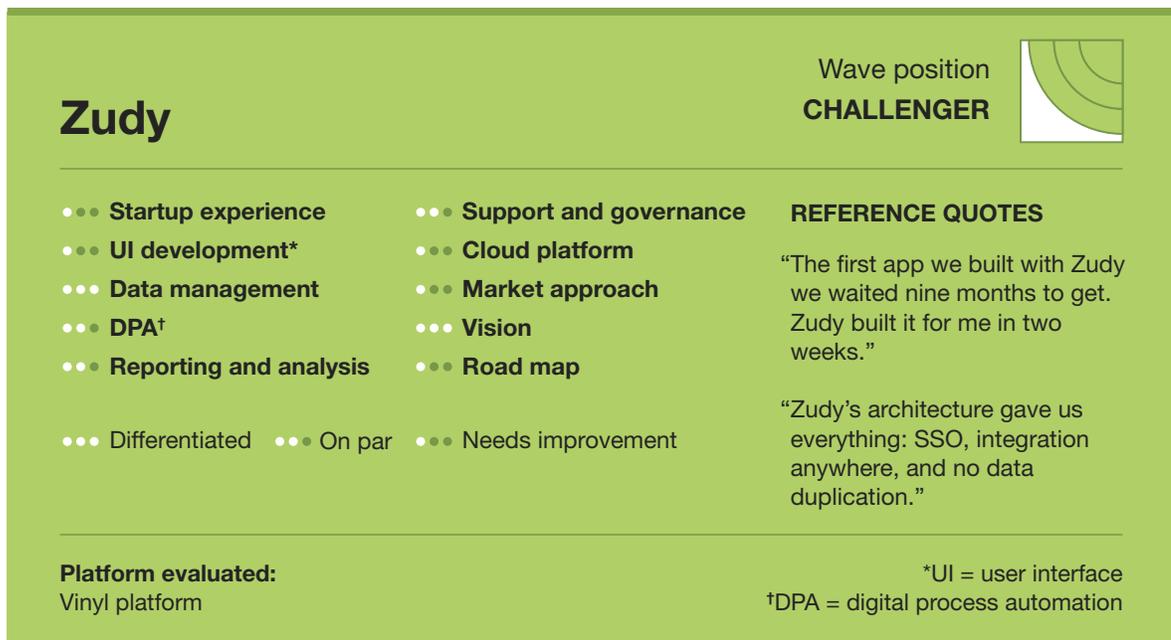
Our evaluation found that (see Figure 13):

- › **Zudy lets you develop apps via a novel Q&A interface.** Businesspeople make a quick start on an app by answering simple questions about it, and then dive into deeper configurations to complete it. Zudy offers help, and the platform is aggressively priced.
- › **Zudy is late to self-service cloud platforms.** The vendor’s public cloud service is new and still lacks broad geographic coverage and an engaging self-service startup experience for prospects.
- › **It’s a good fit for business leaders who need new business services.** For BDs who need operational apps but can’t get priority from central AD&D, Zudy and its platform support enterprise-app delivery led and sustained by business experts.

Zudy Customer Reference Summary

Customers adopt Zudy to get new operational apps quickly without relying on central AD&D. They value the platform’s no code approach and praise the vendor’s assistance.

FIGURE 13 Zudy QuickCard



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Pulpstream: Forrester’s Take

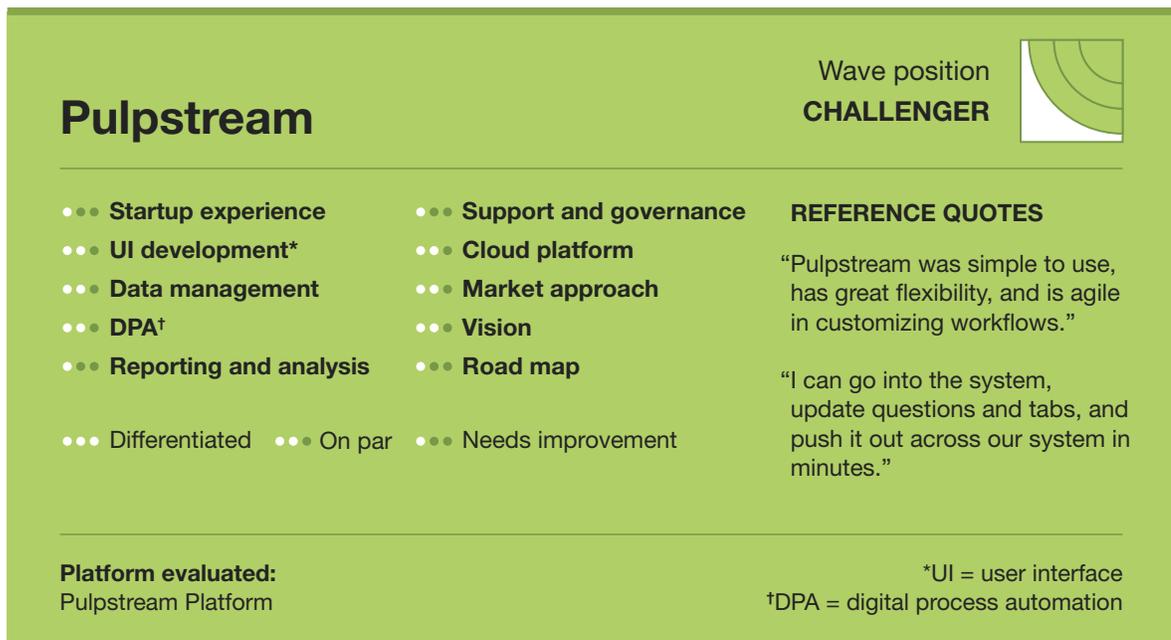
Our evaluation found that (see Figure 14):

- › **Pulpstream offers a rich mobile UX designer and data modeling.** Pulpstream’s mobile UX modeler is rich, flexible, and takes advantage of native device features. Data modeling is rich, yet simpler to define than table-based approaches. Users define processes through form actions.
- › **Process modeling is possible only through form actions.** Customers build processes by defining actions on forms within a stream, a natural but limited method. Salesforce integration is easy, but Pulpstream needs more adapters. The startup experience is uninspiring.
- › **Its best use is to automate field-operations processes.** Primarily through use of mobile devices, field personnel can use Pulpstream to gather and communicate process inputs, guide actions, and report on outcomes.

Pulpstream Customer Reference Summary

Customers confirm Pulpstream’s core use case, highlighting strengths in mobile development, data management, and reporting. Integration ratings depend on the required targets.

FIGURE 14 Pulpstream QuickCard



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Kintone: Forrester’s Take

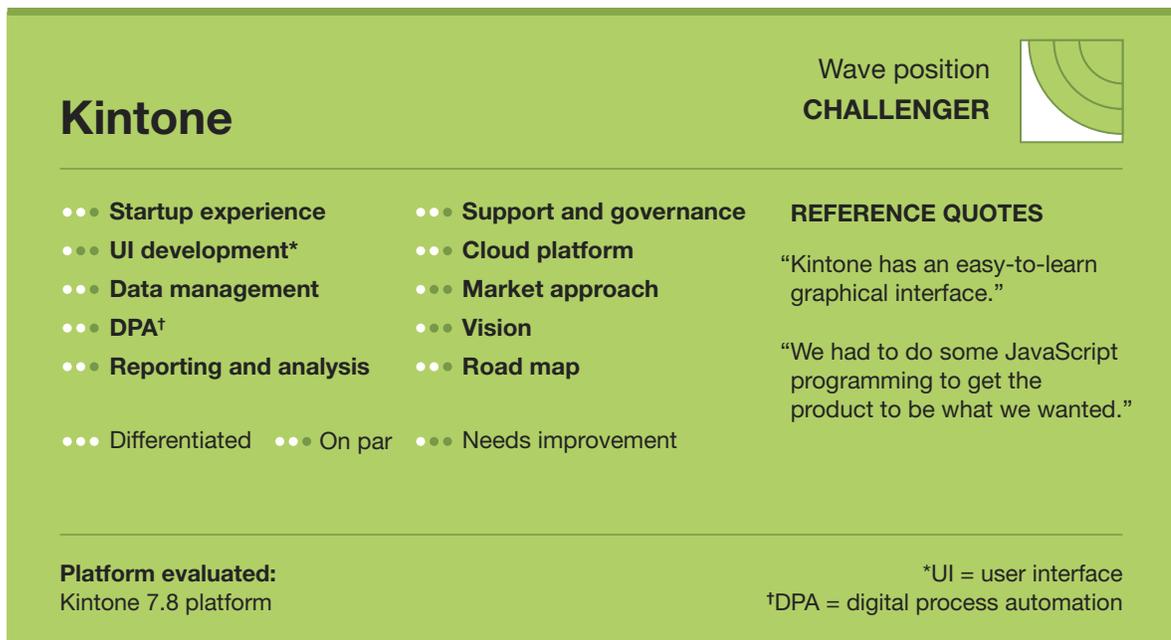
Our evaluation found that (see Figure 15):

- › **Kintone offers a straightforward data-action process and potential for shared data.** Although forms/UX and data anchor development in Kintone, it’s easy to add actions to automate workflows. All data definitions are shareable across apps, and the UX design is responsive.
- › **It’s a potentially complex experience, difficulty to configure.** Kintone provides many resources at startup, but the experience can be confusing. Platform customization may require JavaScript coding. The platform also lacks process modeling.
- › **Today, Kintone is best for automating long-tail data-intensive operational processes.** Expect a full process modeling experience that will round out the platform in mid-2018.

Kintone Customer Reference Summary

Customer feedback was inconsistent but reflected different usage patterns. Usage on one project earned higher scores than usage on multiple projects.

FIGURE 15 Kintone QuickCard



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Vizru: Forrester’s Take

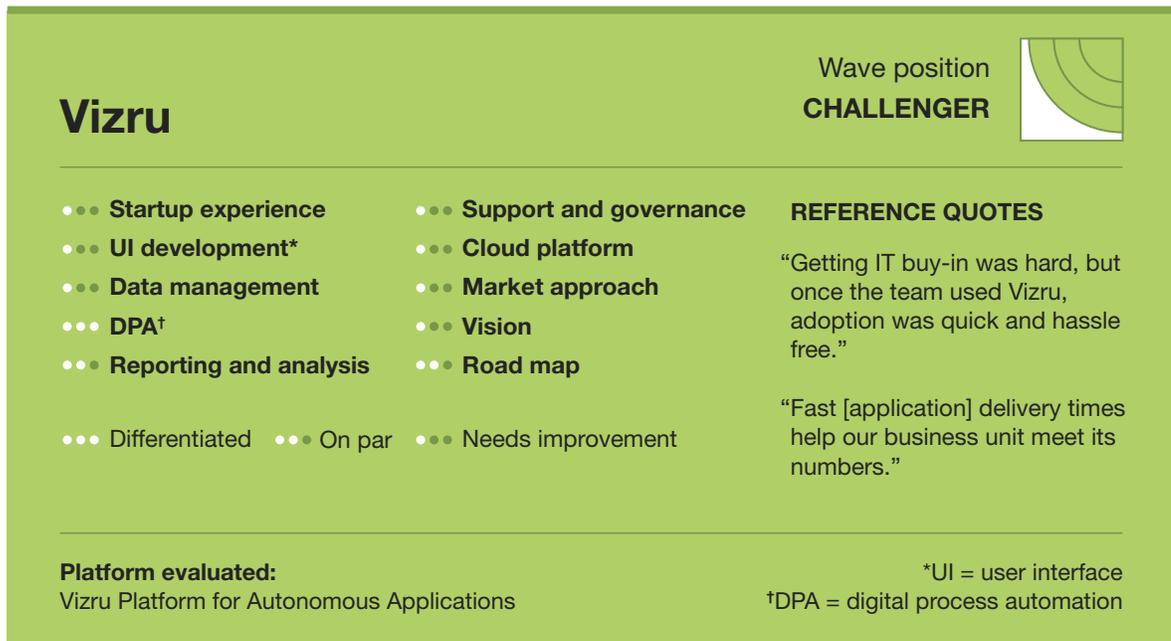
Our evaluation found that (see Figure 16):

- › **Powerful concepts fuel delivery, stencils, data sheets, and process.** Developers typically start with a prebuilt app (stencil) and complete delivery by customizing data model and files through a spreadsheet and rich workflow and integration tools.
- › **The self-service cloud service and low-code business model fall short.** Want to experiment with Vizru? You’ll need to engage with a sales rep. Pricing is opaque, and the vendor’s cloud service has no security certifications yet.
- › **Vizru is for you if you’re planning to distribute your apps.** For Vizru, low-code tools for business developers are a means to allow ISVs and enterprises to create, sustain, and distribute configurable enterprise apps. Vizru’s ideal customer is a franchisee.

Vizru Customer Reference Summary

Vizru’s tech customers have to overcome coding bias but prove Vizru speeds delivery of enterprise operational applications. Some rely on Vizru’s help for their first app.

FIGURE 16 Vizru QuickCard



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Intellect: Forrester’s Take

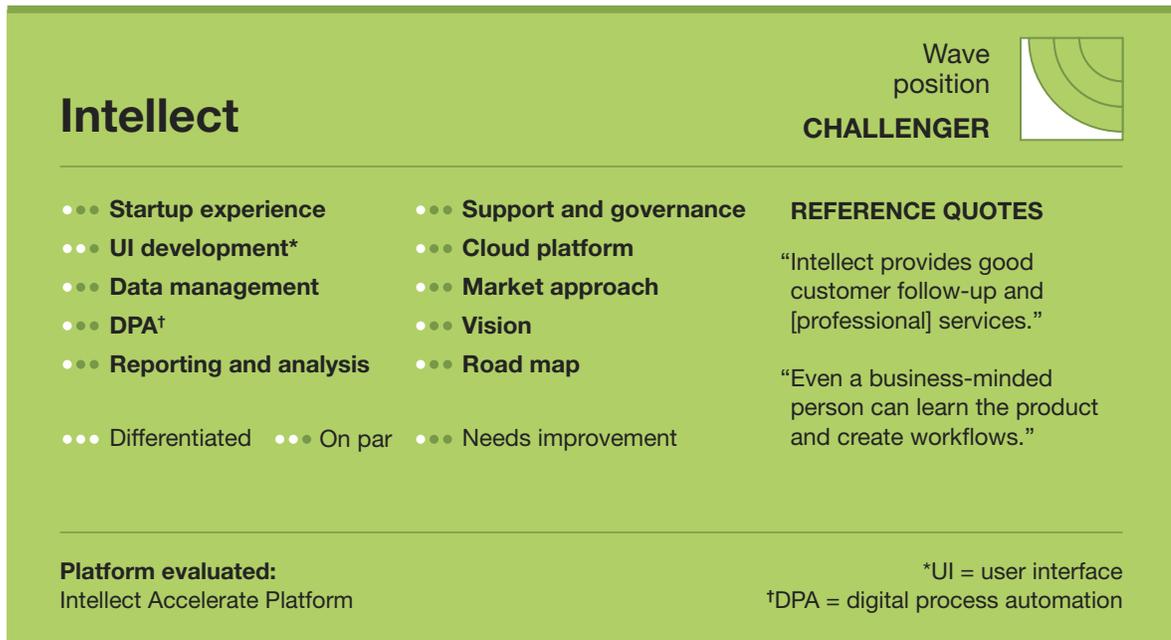
Our evaluation found that (see Figure 17):

- › **Intellect has a strong but limited UX, workflow at the core.** Forms and UX development are powerful but easy; the platform requires separate web and mobile designs. Intellect’s process designer features built-in integration with PDF and other document sources.
- › **There’s no self-service and only limited integration.** Intellect engages directly with customers to start. Data-source integration is emerging; Zapier will solution in the near future. Reporting is limited, and Intellect includes minimal AD&D support tools.
- › **Intellect is best for document-heavy operational processes.** This includes learning and quality management (for which Intellect sells packaged solutions). Business experts can build and maintain apps, but back-office integration may require coding.

Intellect Customer Reference Summary

Customers emphasized the importance of Intellect’s help in gaining user adoption, and verified the product’s usability by nondevelopers to create process applications.

FIGURE 17 Intellect QuickCard



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Endnotes

- ¹ For the sake of brevity, we use the term business developers in the name of this market segment. The products are aimed at two of the three citizen developer personas: business developers and power users. For those definitions and more, see the Forrester report "[How To Harness Citizen Developers To Expand Your AD&D Capacity.](#)"
- ² The most important segments in the low-code development platforms are now products designed to raise the productivity of AD&D pros and products designed to empower business experts. For more, see the Forrester report "[Vendor Landscape: A Fork In the Road For Low-Code Development Platforms.](#)"
- ³ Source: Julia Watts, "Netcall acquires software platform MatsSoft to enter the growing low-code market," Startups.co.uk, August 7, 2017 (<https://startups.co.uk/tech-business-netcall-acquires-software-platform-matsssoft-to-enter-the-growing-low-code-market/>).

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