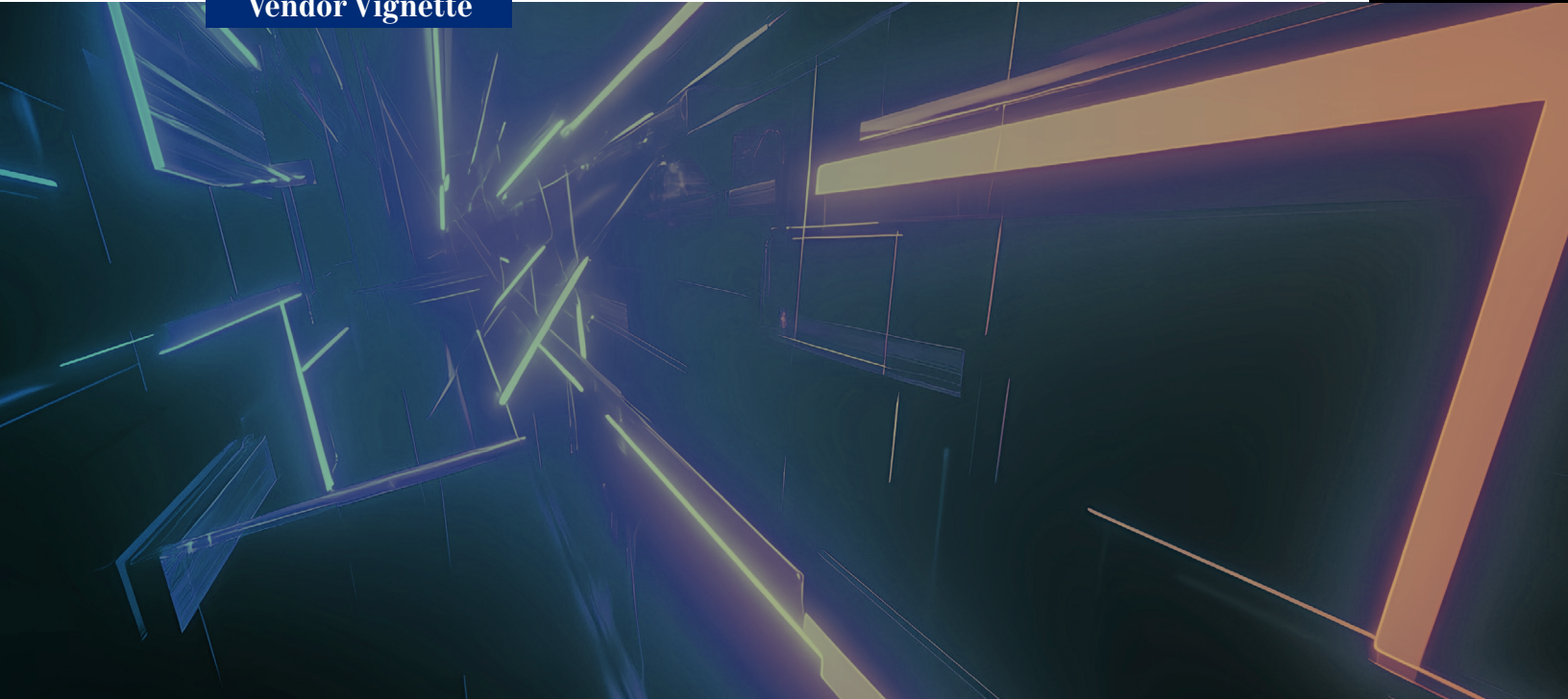




Vendor Vignette



Hyland

Hyland recently launched Content Innovation Cloud™, an enterprise content management (ECM) and unstructured data platform designed to help organizations manage, automate, and optimize document-centric workflows. It integrates AI, robotic process automation (RPA), and low-code development to enhance digital transformation initiatives and, importantly, does not require clients to migrate existing systems and applications.

Founded 1991 | HQ Westlake, OH | 4,000 employees (approx.) | \$1.2B revenue (est.) May 2025



The Company

Hyland was founded in 1991 and is headquartered in Westlake, Ohio. Although the company has made around 30 acquisitions since its founding, the most significant were the 2017 ingestion of the Perceptive business unit from Lexmark, which brought 10 companies under its banner at once, and more recently the acquisitions of Alfresco in 2021 and Nuxeo six months later in early 2022. Hyland is owned by the private equity firm Thoma Bravo, which took a controlling interest in 2007. In 2024, a leadership change at the company resulted in the appointment of Jitesh Ghai (formerly of Informatica) as CEO. We estimate that Hyland's revenues are around \$1.2 billion and that it employs approximately 4,000 people.

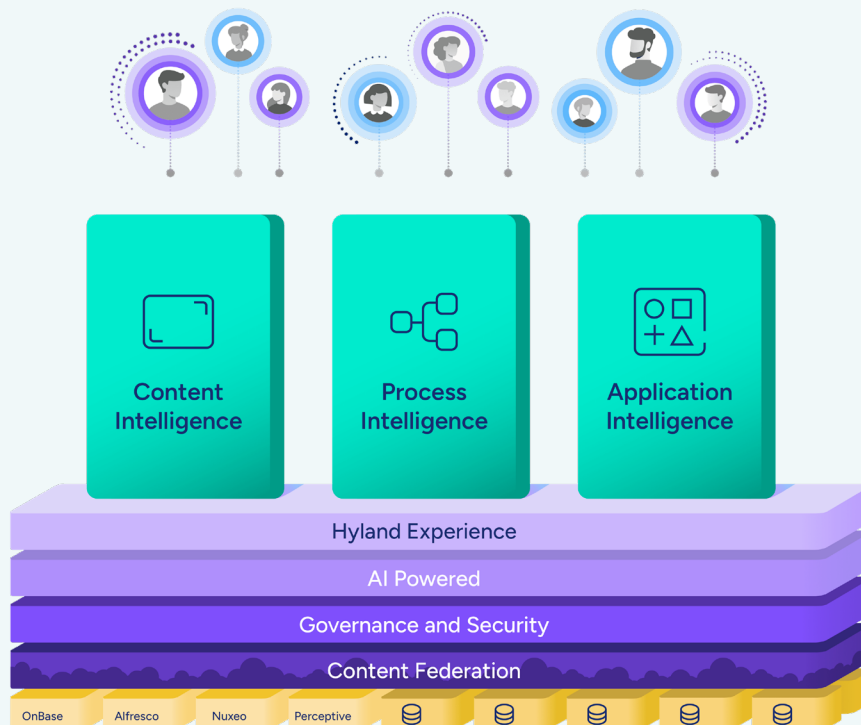


The Technology

Hyland has grown over the years (in part) due to acquisition, and no report can give justice to the breadth and scale of all the products and moving parts in the Hyland portfolio. This report will focus on the most strategic recent changes and key differentiators vis-à-vis Hyland's competition.

In September 2024, Hyland's CEO announced the launch of the Content Innovation Cloud™, a unified platform with three key pillars: Content Intelligence, Process Intelligence, and Application Intelligence (see Figure 1). This marks the first time a vision (and platform) pulls together all the Hyland product set and a chance to reset Hyland's direction toward playing a key part in modernizing legacy IT

Figure 1
Hyland's Unified Platform, Content Innovation Cloud



stacks (through AI and automation). Following are descriptions of the three pillars:

- **Content Intelligence:** Interprets and provides actionable insight into enterprise content (unstructured data).
- **Process Intelligence:** Provides continuous monitoring and analytical insights into business processes.
- **Application Intelligence:** Provides insights into the unstructured data stored and processed within third-party and industry-specific business applications; for example, ERP, CRM, HRIS systems.

The platform itself has solid underpinnings based on a collection of microservices (Docker and Kubernetes). It has been built for continuity and scale, and also to provide a developer-friendly environment offering a wide range of APIs and SDKs (though there are multiple low- and no-code options too). It also supports all the major database options, such as Microsoft SQL Server, Oracle, and PostgreSQL (the latter most commonly for Alfresco implementations).

Hyland is best known for its range of enterprise content management systems that include Alfresco, Nuxeo, OnBase, and Perceptive Content. It also has several specialized applications: in the healthcare sector, for example, it has PACSgear for medical imaging capture, Acuo for a vendor neutral archive, and NilRead for enterprise diagnostic viewing. In addition to all this, Hyland has several process automation products such as Hyland RPA, OnBase Workflow, Alfresco Process Services, and WorkView, its low-code app builder. In short, there is an exceptionally wide array of products and services under the Hyland banner, and with the Content

Innovation Cloud providing an overlay platform to extend, integrate, and design new AI-based applications, not much (if anything) is missing here.

Hyland does have its own long-standing AI system (Brainware) which is usually and logically used for intelligent document processing (IDP). Alfresco, OnBase, and Nuxeo have long leveraged AI capabilities within their systems, and there is support for many third-party AI tools such as Google Dialogflow, AWS Textract, Azure AI Document Intelligence, and others. However, as these are early days for enterprise AI at scale, the future development of many more extensive and specific AI tools by Hyland is to be expected; indeed, it's critical to deliver on its Content Innovation Cloud ambitions.

Although they will need to be further developed, the pillars of the Content Innovation Cloud do already include various AI features. Hyland's Content Intelligence product line introduces AI-ready content capabilities and support for agentic AI, including Knowledge Enrichment, a data management suite to transform unstructured enterprise content into AI-ready data; Knowledge Discovery, an AI-powered search and decision support tool that enables natural language queries across multiple repositories; and Agent Builder, providing AI agent configuration and lifecycle management. These products are designed to complement Hyland's Process Intelligence offerings, which include Hyland Automate, an AI-enhanced solution for content-driven process automation and service orchestration; Hyland IDP, an AI-powered document-capture, separation, classification, and intelligent data extraction product; and Hyland RPA, a robotic automation software suite.

In summary, Hyland Content Innovation Cloud is an enterprise content management (ECM) and unstructured data platform designed to help organizations manage, automate, and optimize document-centric workflows. It integrates AI, robotic process automation (RPA), and low-code development to enhance digital transformation initiatives.

However, it is critically important to also point out what currently makes this platform a bit different. In short, the stated goal of the platform is that you can leave all your data and processes in place, whether they remain in Hyland repositories, legacy repositories, or third-party applications, and whether they reside on-premises or in the cloud. That may seem like a small thing to some, but it's a game changer for Hyland's customer base. This is because not just Hyland but also all its competitors have long pushed clients to migrate legacy applications to the cloud to leverage new capabilities, something many were either unwilling or unable to do. Moving forward, customers can start their agentic AI journey with the systems and deployment locations they are most comfortable with.

Our Opinion

Over the past year, Hyland has undertaken a major rethink of its strategy, away from a collection of individual products and applications toward a unified platform. In our analysis, this is both timely and arguably overdue. Timely in that the growth of interest in enterprise AI provided an opportunity for Hyland to reposition itself to grow and, just as importantly, enable its customer base to drive more value from their Hyland investments, and overdue as there has been little new from Hyland in many years. We really like the new AI platform approach, and in conversation with Hyland's customers, so do they, as wisely it meets them where they are and doesn't demand unrealistic overhauls and migrations. It's a big shift for a big company, one with a big customer base, but so far, the signs are positive.

Advice to Buyers

Hyland is one of the largest and most trusted vendors in our sector. What Hyland promises to deliver, they deliver. If you are an existing Hyland customer, you should be exploring the new possibilities the Content Innovation Cloud opens up for your organization. If you're not a current Hyland customer but are a document- and process-heavy organization looking to modernize and leverage AI in general, and agentic AI specifically, then Hyland should likely be on your shortlist of options to explore.

Strengths

- A well-established, well-funded, and highly respected firm with deep expertise in document-centric environments

Opportunities

- The era of enterprise AI and agentic AI is only just getting out of the starting blocks; Hyland has a once-in-a-generation opportunity to build on this

Aspirations

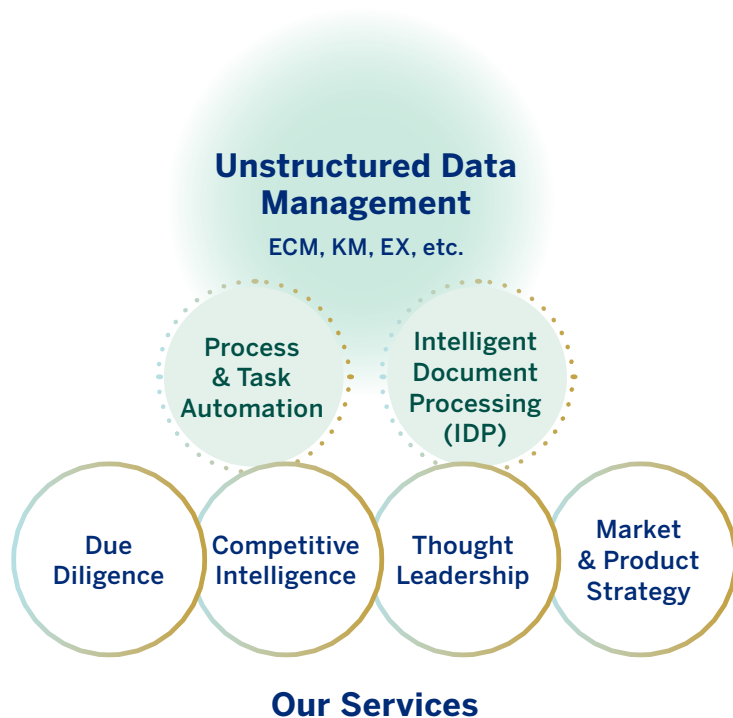
- To be the leader in enterprise unstructured data automation

Results

- Already delivering updates to the recently announced Content Innovation Cloud platform, with more upgrades and extensions expected this year

About Deep Analysis

We Research Innovation



Deep Analysis is an advisory firm that helps technology vendors, buyers, and investors understand and address the challenges of innovative and disruptive technologies in the enterprise software marketplace.

The firm's work is built on decades of experience advising and consulting to global technology firms large and small, from SAP, Oracle, and HP to countless start-ups.

Led by Alan Pelz-Sharpe, Deep Analysis works with technology vendors, buyers of enterprise technology, and investors in the ECM and enterprise automation market to improve their understanding of the information management technology landscape and provide actionable guidance.

Deep Analysis' timely book, "Practical Artificial Intelligence: An Enterprise Playbook," outlines strategies for organizations to avoid pitfalls and successfully deploy AI.

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