

Ovum Decision Matrix: Selecting a Web Experience Management Solution, 2016–17

Publication Date: 08 Dec 2016 | Product code: IT0014-003186

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Summary

Catalyst

Organizations need to digitally transform themselves in order to address the needs of the millennial generation (employees and consumers). A relatively quick win as far as digital transformation is concerned is web experience management (WEM), which allows organizations to provide their customers with highly relevant, engaging, personalized content on the device of choice of the customer. However, the same technology can also be applied to intranets to provide employees with a platform to exchange and collaborate on ideas, a repository for training manuals and other documents, a portal to turn manual procedures for employees into self-service processes, and a method of imparting knowledge and expertise. Organizations that are using a modern WEM platform will already be on the road to digital transformation. These platforms should include core web content management (WCM) capabilities, digital asset management (DAM), web analytics, and social capabilities, and support mobile-first. If the WEM product you are using does not offer these capabilities, then you need to consider adopting a platform that does. This Ovum Decision Matrix compares leading WEM solutions so that organizations can select the solution that best suits their requirements.

Ovum view

Digital transformation should be on the agenda of all organizations; an important element of that transformation is the way in which organizations interact with their customers, and how marketers can use new ways to engage with visitors to convert them into customers. This is especially important as consumers have a very short attention span when it comes to locating the information they want on websites. This is particularly true for millennials who are accustomed to accessing content on demand, on the device of their choice. Organizations typically have fewer than ten seconds to engage website visitors, so it is imperative that relevant content is delivered speedily, is highly relevant, and can also be delivered to a wide range of devices, allowing access to content on the move.

Organizations that are unable to do this will lose out to competitors that can. Ensure that a mobile-first strategy is adopted, allowing visitors to access content on a wide variety of mobile devices. Take advantage of geolocation features that are available in many WEM products to offer localized content to visitors, and use web analytics to personalize the experience that is offered to website visitors, ensuring that relevant, engaging content is delivered to maximize conversion rates.

WEM solutions are not a single product, but a number of tightly integrated technologies, often sold as a single platform. These are core WCM, web analytics, DAM, social capabilities, and mobile features. In order to support the entire customer journey, marketing automation, e-commerce, and customer relationship management (CRM) products are also required. While a few vendors provide true end-to-end customer experience management (CEM) solutions, most provide tight integration with these additional technologies. Therefore, when selecting a WEM solution look at the connectors that are provided to marketing automation, e-commerce, and CRM products. To be effective, these integrations must be seamless, allowing users to access the additional capabilities offered by these products from within the WEM interface. A common criticism of WEM vendors is that their solutions can be complex and difficult to implement, and while ease of implementation is something that vendors strive for, they are not there yet, and professional services are often required to help with the

deployment. Select an implementation partner that has expertise in your vertical industry, because although most vendors provide templates and best-practices advice that enable organizations to get websites up and running quickly, partners may provide connectors to industry-specific back-end systems. Also consider the various deployment models available, as most WEM solutions are available in the cloud, either provided directly by the vendor or by partners. Flexible deployment options mean that organizations have the option of deploying on-premise, in the cloud, or a hybrid model.

Confusion in terminology reigns in the content management system (CMS) space. The WCM label no longer reflects the capabilities of this category of product, as it is all about enhancing the customer experience; therefore, WEM more accurately describes the solutions that enable organizations to offer their customers engaging web experiences. The WEM market comprises a wide range of vendors that includes cloud-only, open source, enterprise content management (ECM), and specialist vendors. Ovum estimates the market to be worth about \$4bn, and projects it to rise to approximately \$6.5bn by 2020, and while this is an extremely lucrative market, there is a significant degree of consolidation taking place. Since the publication of the *Ovum Decision Matrix: Selecting a Web Content Management Solution, 2014–15* in April 2014, Ektron and Episerver have come together under the Episerver brand, and OpenText has acquired the CEM assets of HP Inc., which added TeamSite to its portfolio. OpenText is the only vendor to have two products in this Ovum Decision Matrix, but we expect to see further consolidation in the future as vendors attempt to strengthen their positions in an increasingly competitive landscape. The lines between WEM, e-commerce, and marketing automation are also blurring as WEM vendors buy e-commerce and marketing automation vendors to offer end-to-end digital marketing solutions, and marketing automation and e-commerce vendors begin to move into the WEM space, again largely through acquisition.

Key findings

- WEM is an important element of a digital transformation strategy and a quick win in terms of supporting the demands of consumers and employees.
- Integration with marketing automation, e-commerce, and CRM products is key to a successful WEM implementation, and connectors to specific products in these areas should be considered as part of the product selection process.
- WEM technologies can be used internally to help the organization operate more efficiently, as well as for enhancing customers' journeys via websites.
- The WEM vendor landscape is healthy, with a range of ECM, cloud-only, open source, and specialist vendors all providing feature-rich solutions.
- Many organizations will find that niche vendor products are a better fit to their requirements than products from some of the large multiple-product vendors, which provide features and functions that they will never need.
- WEM vendors are having to innovate more to find areas of differentiation. For example, both IBM and Squiz are developing new innovative analytics capabilities.
- All WEM vendors provide mobile-first capabilities, but enterprises should ensure that they provide support for a wide range of mobile devices and operating systems.

- Adobe, IBM, OpenText (TeamSite and WEM), Oracle, SDL, and Squiz are all leaders in this Ovum Decision Matrix, which is up from the three leaders identified in the prior Ovum Decision Matrix. This demonstrates how dynamic the WEM market has become.
- Crownpeak, Episerver, and Sitecore are challengers, and all have the potential to be leaders in a future Ovum Decision Matrix.
- CoreMedia, Kentico, and Magnolia are niche vendors in this Ovum Decision Matrix, but their capabilities will suit the needs of many organizations requiring a focused solution.

Vendor solution selection

Inclusion criteria

The WEM vendor landscape is growing rapidly as new players move into the space. Therefore, Ovum decided to include only those vendors that are well established in this space. Because of the strict inclusion criteria, some vendors declined the invitation to participate on the grounds that they do not offer the required range of capabilities.

To be included in the Ovum Decision Matrix for web experience management, 2016–17, a vendor solution needed to meet the following criteria:

- Can be deployed standalone and is not dependent on any other components of an ECM platform.
- Includes a fully featured core WCM platform and repository. Content and display templates are created and stored separately.
- Includes analytics or integrates with popular analytics systems.
- Includes digital asset management capabilities.
- Includes social capabilities.
- Provides extensive mobile support with responsive design.
- Includes integration with market automation, e-commerce, and CRM systems to support the end-to-end customer journey.
- Has a significant level of recognition among enterprises, covers a range of verticals, and has a presence in multiple geographies.

Exclusion criteria

Ovum followed strict inclusion criteria for this Ovum Decision Matrix. Some ECM platform vendors were excluded on the grounds that their WEM products were, in Ovum's opinion, relatively weak, with their strengths lying in other areas of their large ECM portfolios.

A vendor's solution was not included in the Ovum Decision Matrix for web experience management, 2016–17, if:

- The solution required functionality from a larger portfolio, such as a shared repository or a core platform.

- The vendor was focused on ECM and was weak in WCM, with its strengths lying in other areas of its large ECM portfolio.
- The vendor's offering was limited to a restricted geographical region.

Methodology

Technology assessment

In this assessment dimension, Ovum analysts develop a series of features and functionality that would provide differentiation between the leading solutions in the marketplace. The criteria groups identified for web experience management are as follows:

- **Core web content management features:** The functionality required to build websites and create, edit, and publish content. Also includes a repository and administration tools.
- **Web analytics:** Tools to analyze visitor behavior on a website as well as individual page visits, providing an aid to marketers to optimize and personalize content.
- **Digital asset management:** A system for storing and managing digital assets such as images, video, and audio.
- **Mobile capabilities:** The ability to support the creation and delivery of content in the appropriate format for a wide variety of mobile devices, including smartphones and tablets.
- **Social media capabilities:** Features that provide social-like capabilities and integration with social network sites.
- **Architecture and administration:** A platform approach with a single point of control for all the technologies delivered, and integration with enterprise security tools and regimes.

Execution

In this dimension, Ovum analysts review the capability of the solution around the following key areas:

- **Maturity:** Ovum assesses the stage that the product/service is currently at in the maturity lifecycle, in relation to the maturity of the overall technology/service area.
- **Interoperability:** In this element we assess how easily the solution/service can be integrated into the organization's operations, relative to the demand for integration for the project.
- **Scalability:** Ovum measures the scalability of the solution across different scenarios based upon various points of information.
- **Deployment:** Referring to a combination of assessed criteria and points of information, Ovum analysts provide detail on various deployment issues, including time needed to deploy, industries in which deployment has occurred, services, and support.

Market impact

In this dimension, Ovum assesses the global market impact of a solution, with measurements across four categories, each of which has a maximum score of 10.

- **Revenue:** Each solution's global web experience management revenues are calculated as a percentage of the market leader's. This percentage is then multiplied by a market maturity value and rounded to the nearest integer. Overall global revenue carries the highest weighting in the market impact dimension.

- **Revenue growth:** Each solution's future market share based on a revenue growth estimate for the next five years is estimated as a percentage of the value of the largest solution in the market. The percentage is then multiplied by 10 and rounded to the nearest integer.
- **Geographical penetration:** Where the information is provided, Ovum is able to establish the geographical reach of the product, both in terms of regional brand recognition and physical presence. Sales operations and provision of local support are also given merit.
- **Vertical penetration:** Where the information is provided, the growth rate for each vendor in vertical industries is considered, along with other market impact indicators.

Ovum ratings

- **Market leader:** This category represents the leading solutions that we believe are worthy of a place on most technology selection shortlists. The vendor has established a commanding market position with a product that is widely accepted as best-of-breed.
- **Market challenger:** The solutions in this category have a good market positioning and are sold and marketed well. The products offer competitive functionality and a good price-performance proposition, and should be considered as part of the technology selection.
- **Niche vendors:** Solutions in this category are typically aimed at meeting the requirements of a particular kind of customer. As a tier-one offering, they should be explored as part of the technology selection.

Ovum Decision Matrix Interactive

To access the Interactive Decision Matrix for WEM – an online interactive tool that provides the technology features that Ovum believes are crucial differentiators for leading solutions in this area – please download the Ovum Interactive Decision Matrix tool from the Ovum Knowledge Center.

Market and solution analysis

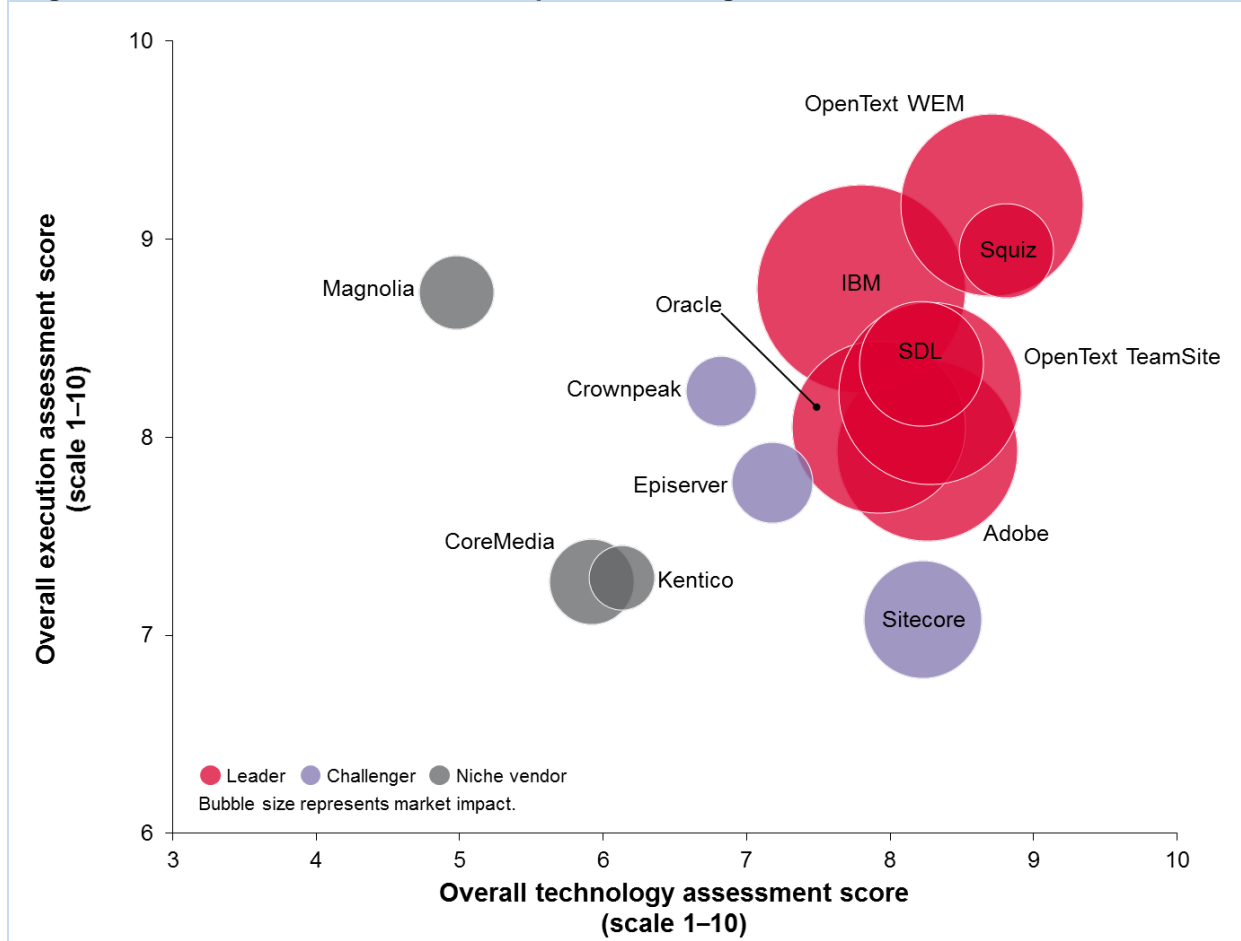
Ovum Decision Matrix: Web Experience Management, 2016–17

WEM is a mature technology area, which has evolved over the past few years from relatively simple WCM platforms to WEM portfolios that help organizations to support their customers' journeys across multiple channels and devices. There are diminishing areas of differentiation within WEM technologies, and some vendors are expanding their portfolios to offer marketing automation and e-commerce capabilities to provide end-to-end CEM capabilities. Vendors that have extended their portfolios into these areas tend to acquire vendors with extensive capabilities, which will provide more features than many organizations require. While there are some advantages to attempting to meet all CEM requirements by using a single vendor, it does tend to add complexity to the solution, and it may still require multiple licenses. In addition, some organizations do not require complex and extensive marketing automation and e-commerce capabilities, and a best-of-breed solution may be a better option. Many of the specialist WEM vendors have better integration capabilities with third-party

marketing automation, e-commerce, and CRM products than the larger vendors with end-to-end capabilities.

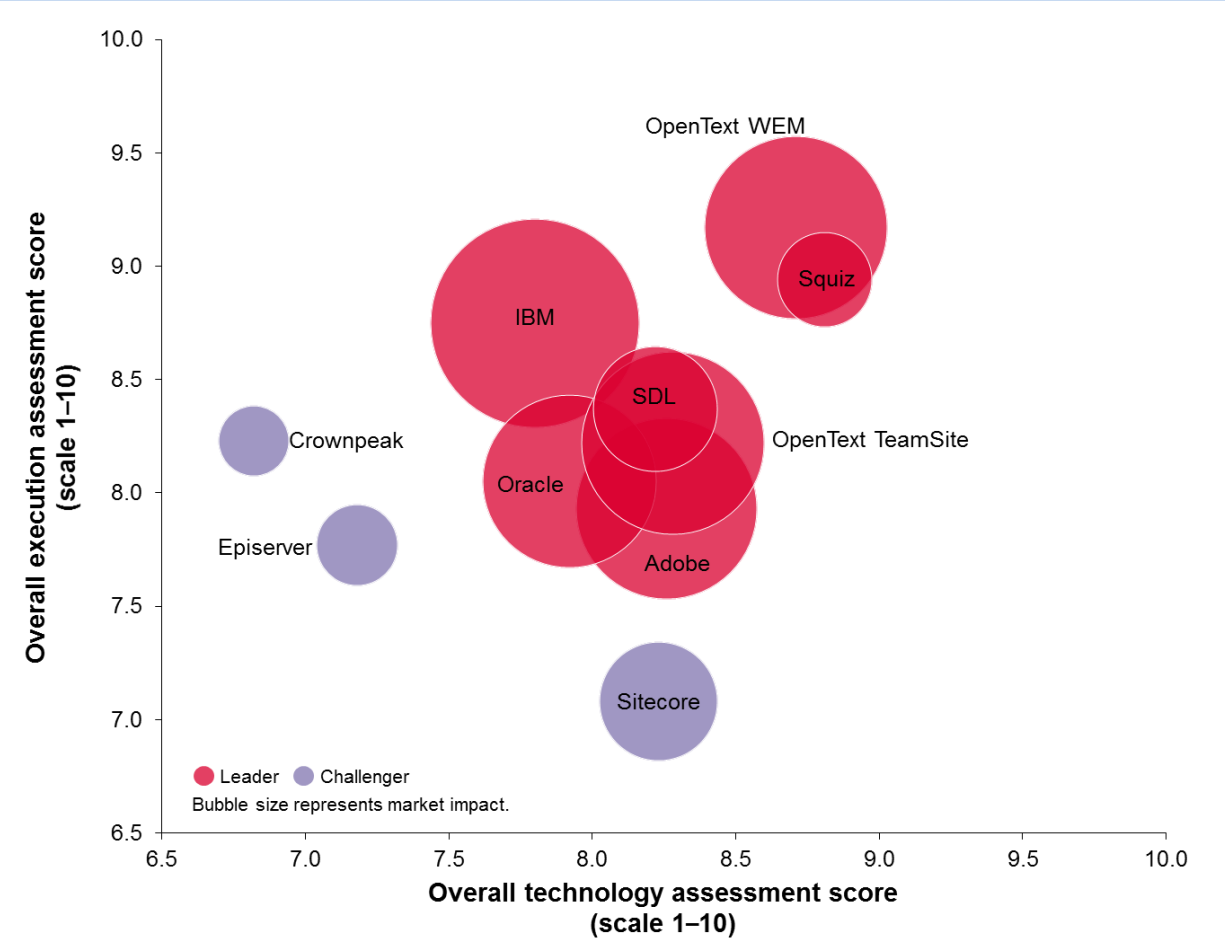
At the same time, e-commerce vendors are starting to move into the WEM space, which means in the future it will be more difficult to differentiate between WEM and e-commerce vendors.

Figure 1: Ovum Decision Matrix: Web Experience Management, 2016–17



Source: Ovum

Figure 2: Expanded view of leaders and challengers, Ovum Decision Matrix: Web Experience Management, 2016–17



Source: Ovum

Table 1: Ovum Decision Matrix: Web Experience Management, 2016–17

Market leaders	Market challengers	Niche vendors
Adobe	Crownpeak	CoreMedia
IBM	Episerver	Kentico
OpenText TeamSite	Sitecore	Magnolia
OpenText WEM		
Oracle		
SDL		
Squiz		

Source: Ovum

Market leaders: Adobe, IBM, OpenText TeamSite, OpenText WEM, Oracle, SDL, and Squiz

The market leader category comprises a combination of specialist WEM vendors and ECM vendors. There has been a lot of movement since the last Ovum Decision Matrix in this area (*Ovum Decision Matrix: Selecting a Web Content Management Solution, 2014–15*, April 2014). IBM, OpenText TeamSite (formerly HP Inc.), and Squiz remain in the leader category, where they are joined by Adobe, OpenText (WEM), Oracle, and SDL. This increase in the number of leaders reflects the way in which many of the features associated with WEM are becoming commoditized. Vendors are having to innovate in order to differentiate themselves from their competitors. Adobe, IBM, and Oracle also have products in the marketing automation and e-commerce space, which reflects the desire of many vendors to provide end-to-end CEM solutions. However, because they have their own products in these areas, their connectors to third-party products in these areas tend not to be as extensive as those of the other vendors in this Ovum Decision Matrix.

IBM, Oracle, and OpenText (TeamSite and WEM) are all large, tier-one ECM vendors with very large portfolios of capabilities, so it is no surprise to see them in the leader category of a content management-related Ovum Decision Matrix. Adobe has built a large portfolio of CEM products, which has enabled it to become a leader in several of the WEM technology areas, including web analytics.

SDL has divested itself of some of its noncore products in order to focus on WEM and its translation services, which is paying dividends as it has improved its position from being a challenger in the last Ovum Decision Matrix to being a leader this time. Squiz, the only open source vendor to appear in the leader category, continues to innovate, which allows it to score very highly in the technology dimension in this Ovum Decision Matrix.

Market challengers: Crownpeak, Episerver, and Sitecore

The challengers are a diverse group. Crownpeak is a first-time participant in the WEM Ovum Decision Matrix. As a cloud-only solution, it is differentiated from all of the other vendors included in this Ovum Decision Matrix who provide on-premise solutions, although most also now offer a cloud option, either directly or through partners. Episerver, a specialist WEM vendor, has benefited from its merger with Ektron, which has allowed features from both portfolios to be incorporated into a single product. It provides core WCM features, analytics, social capabilities, and a mobile-first facility, along with digital marketing and digital commerce. Sitecore, another specialist WEM vendor, provides a solution that is technically strong, and is moving towards e-commerce and marketing automation by extending its capabilities. It offers a single, connected platform, which provides WCM, analytics, social capabilities, process-based tools, email, and commerce, combining WEM and marketing automation. Its strong integration capabilities allow access to CRM, enterprise resource planning (ERP), point of sale, and third-party database data.

Niche vendors: CoreMedia, Kentico, and Magnolia

CoreMedia, Kentico, and Magnolia make up this category. All three products have strong features and should be considered when organizations are shortlisting WEM products. Their features will certainly suit the requirements of a great many organizations, and all three count large enterprises among their customer bases. CoreMedia Digital Experience Platform is a content and digital asset management

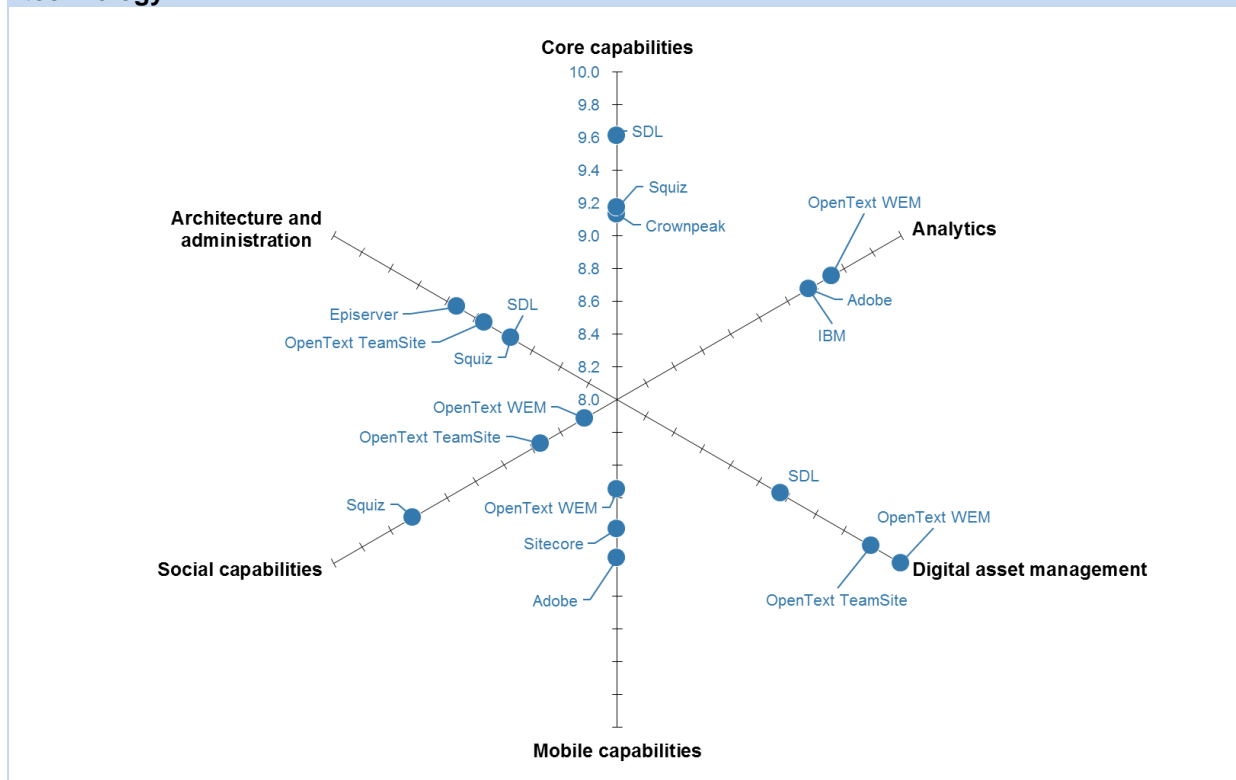
platform that supports a flexible, object-oriented content-modeling paradigm to deliver dynamic online experiences across multiple channels, pages, and websites. It is ideally suited to storing assets that need to be reused across multiple channels, and this is an advantage for CoreMedia over many of its competitors. Kentico Enterprise Marketing Solution will appeal to many organizations due to its e-commerce capabilities. In addition, with connectors provided for Active Directory, Microsoft SharePoint, and Data.com (a Salesforce.com connector coming soon), followed by a connector for Microsoft Dynamics CRM, specific integrations have been made easier.

As an open source vendor, Magnolia has struck the right balance between providing a platform that developers are happy using and creating an environment for nontechnical users to create and publish content. Magnolia's editing and administration interface uses tiles to depict applications. Each tile corresponds to a major task, such as editing a page or managing assets. Editing content can be done through either dedicated apps or a generic page editor that lets editors assemble pages from pre-built components.

Market leaders

Market leaders: technology

Figure 3: Ovum Decision Matrix: Web Experience Management, 2016–17 – Market leaders – technology



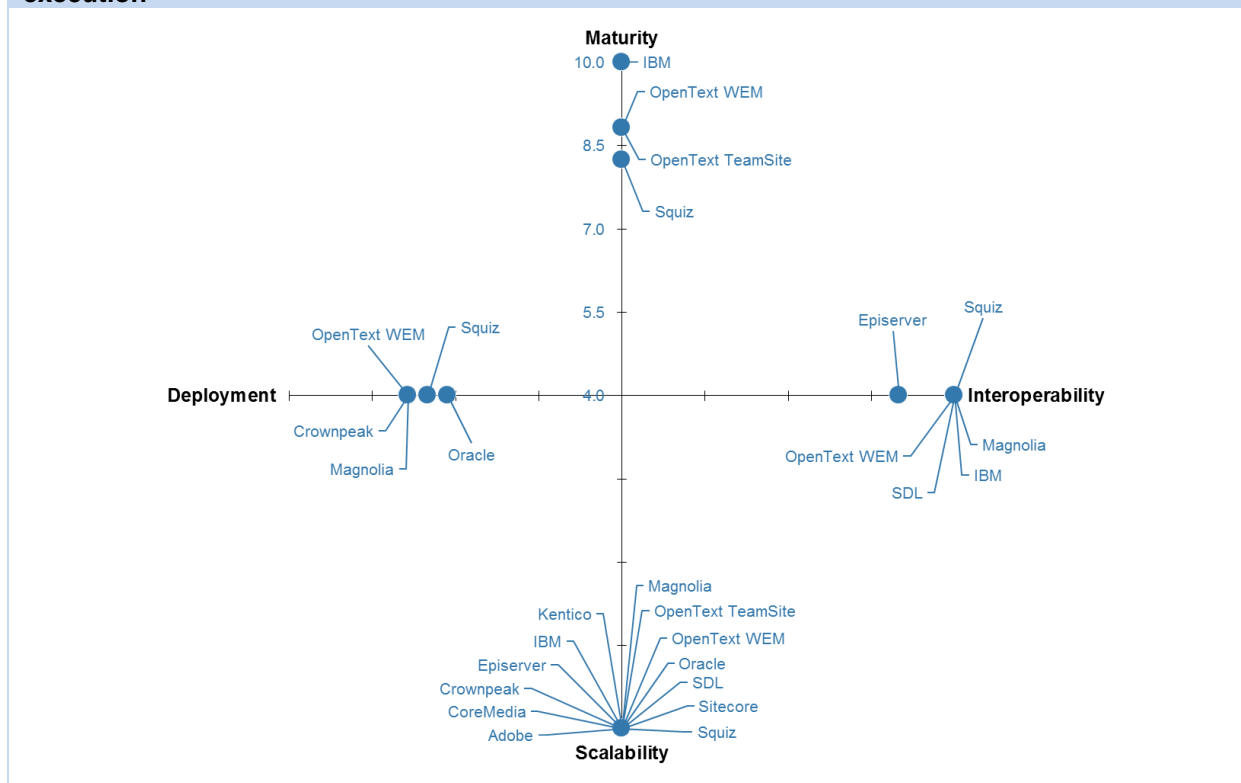
Source: Ovum

A large number of vendors fall into the leader category for the technology areas that are covered in this Ovum Decision Matrix. For core capabilities, SDL, Squiz, and Crownpeak are the top three vendors, which demonstrates that often specialist vendors, with smaller portfolios to maintain, have an

advantage over large multiple-product vendors when it comes to developing new features for core products, and should not be discounted when it comes to shortlisting vendors for new implementations. The leaders for analytics comes as no surprise as OpenText (WEM), Adobe, and IBM are all vendors with leading analytics products and capabilities. In the DAM category, the two OpenText products and SDL are ahead of the other vendors. This is an area where many WEM vendors just provide lightweight DAM capabilities, and this provides an opportunity for vendors with standalone DAM products. Mobile capabilities are led by Adobe, Sitecore, and OpenText (WEM). This is an area where there is more differentiation between vendors, but even the leading vendors' scores are lower than in the other technology areas, demonstrating that all vendors need to extend their mobile features to fully support the requirements of organizations. Mobile is an important area as all vendors must now provide a mobile-first environment, which means providing full support for a wide range of mobile devices and operating systems. Social is another area where there is great differentiation between vendors, but again the leading vendors' scores are lower than in the other technology areas. As with mobile, vendors need to extend their social features to fully support the requirements of organizations. The top three vendors here are Squiz and the two OpenText products. Finally, in the administration and architecture category, Episerver, OpenText TeamSite, SDL, and Squiz come out on top.

Market leaders: execution

Figure 4: Ovum Decision Matrix: Web Experience Management, 2016–17 – Market leaders – execution



Source: Ovum

The execution dimension has thrown up some interesting results, as it is not necessarily the vendors that have done well in the technology dimension that are the leaders when it comes to the ability to

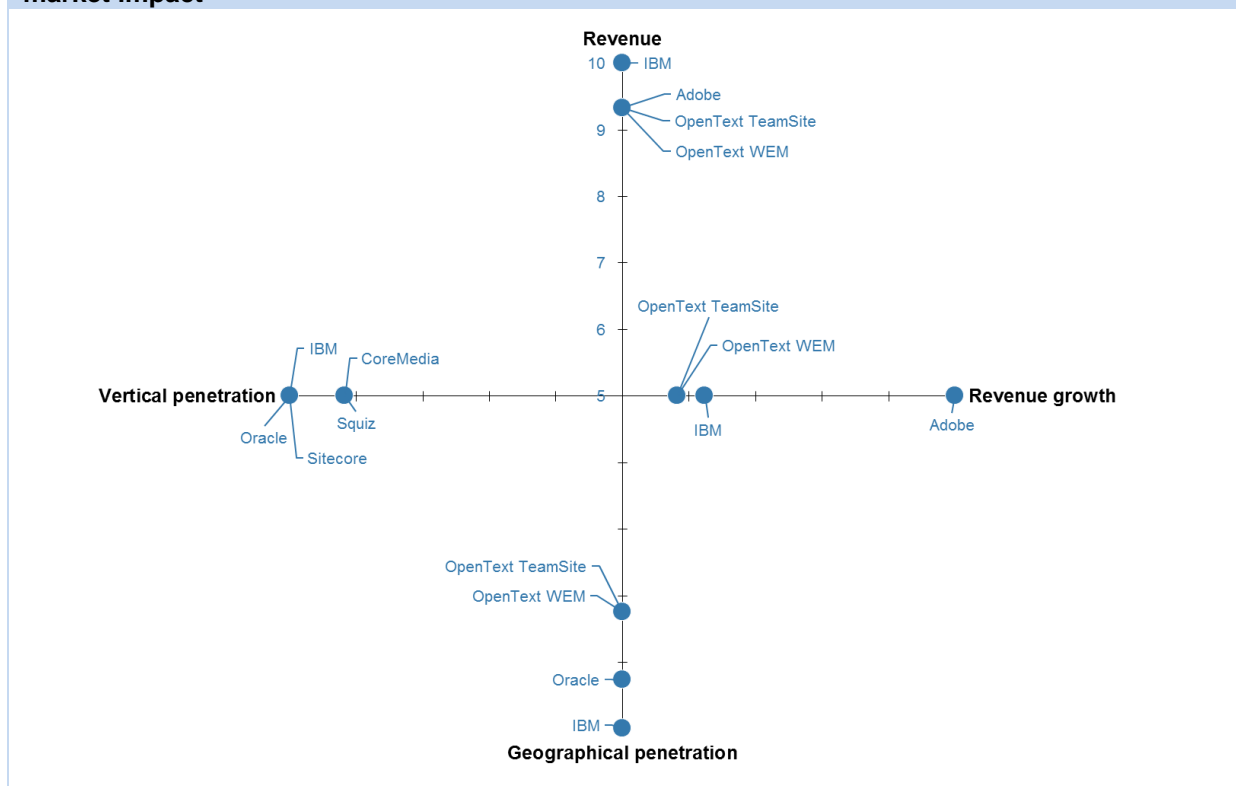
execute. This is an important factor, and something that organizations need to take into account when shortlisting WEM products.

In terms of maturity, IBM, the two OpenText products, and Squiz come out on top, partly because they all have strong roadmaps and long-term strategies. A number of vendors score full marks for interoperability. These are IBM, Magnolia, OpenText (WEM), SDL, and Squiz, with Episerver not far behind. Finally, deployment provides some interesting results as the scores are considerably lower than the other execution categories, with Crownpeak, Magnolia, OpenText (WEM), Squiz, and Oracle as the leading vendors.

Deployment is an area where vendors are often criticized because WEM products can be complex to implement, often requiring professional services either from the vendor itself or a partner. All vendors need to improve their deployment capabilities, by making solutions easier to implement and providing more out-of-the-box features that help the implementation process.

Market leaders: market impact

Figure 5: Ovum Decision Matrix: Web Experience Management, 2016–17 – Market leaders – market impact



Source: Ovum

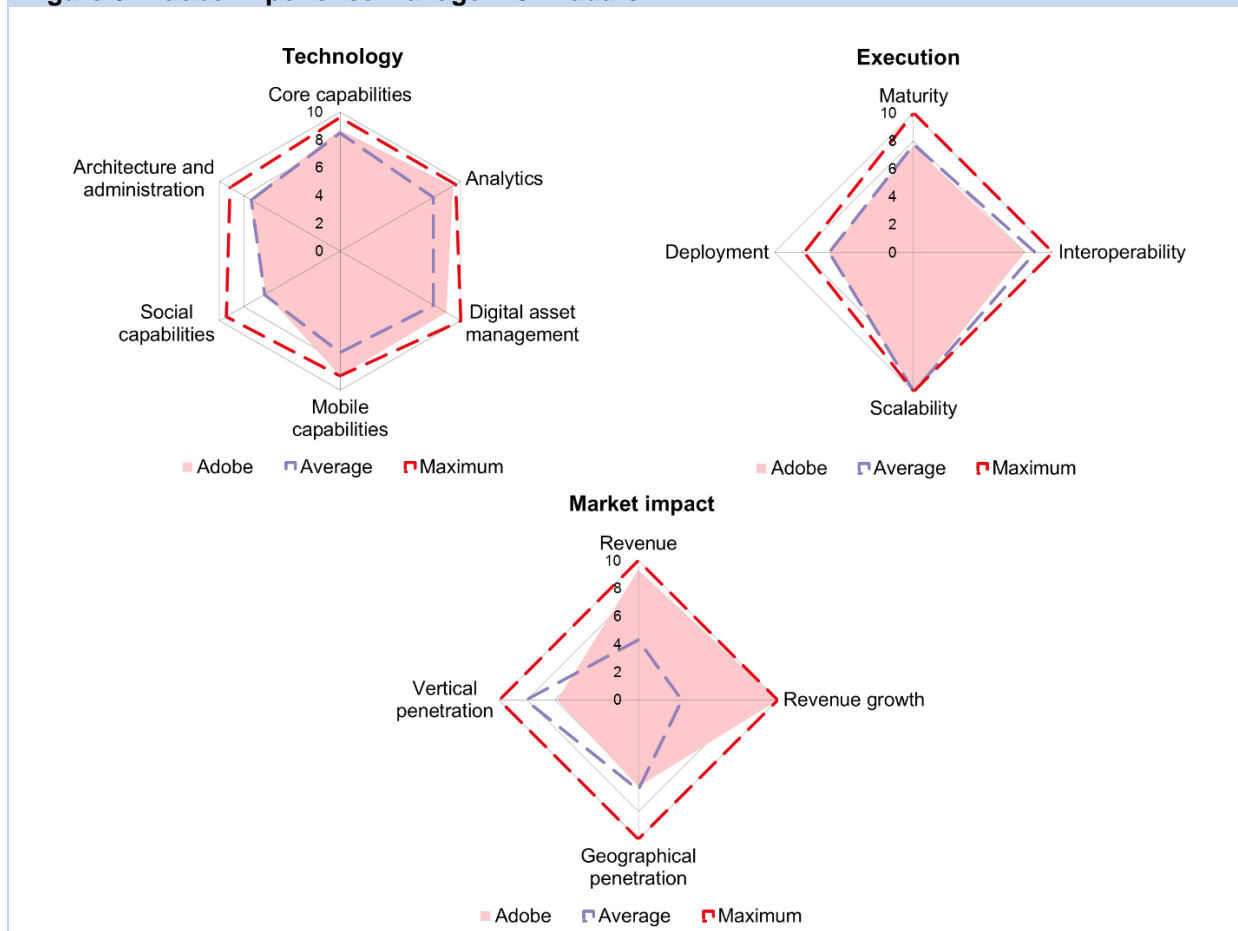
Market impact is a difficult area to assess as larger multiple-product vendors generally do not break their revenues down by individual technology areas. In terms of revenue, the largest vendors are IBM, Adobe, and OpenText. All three companies have made multiple acquisitions in the WEM area, which has allowed them to increase their revenues. In terms of revenue growth, the leaders are Adobe, IBM, and OpenText. This category estimates the market growth of each vendor over the next five years. In terms of geographical penetration, IBM, Oracle, and OpenText are considerably ahead of the other

vendors. It is no coincidence that the largest vendors have the greatest geographical reach in terms of their physical presence. Finally, for vertical penetration, IBM, Oracle, and Sitecore are the leaders, with CoreMedia and Squiz not far behind. This demonstrates that smaller vendors can successfully target and sell into multiple vertical industries.

Vendor analysis

Adobe Experience Manager v6.2 (Ovum recommendation: Leader)

Figure 6: Adobe Experience Manager v6.2 radars



Source: Ovum

Ovum SWOT assessment

Strengths

AEM Sites has been designed for ease of use by marketers: An easy-to-use interface provides marketers with the tools to create, manage, and deliver relevant and engaging experiences across responsive websites, mobile websites, and on-site screens. A single platform connects all capabilities, making it easy for IT to manage. Included are common standards, shared core services, extensibility, and easy integrations. Some analytics are included in AEM Sites, but Adobe has one of the leading

analytics products in Adobe Analytics, which is available as an add-on and provides features such as multivariate testing and real-time website analytics and reporting.

AEM Communities helps organizations build their social engine: Organizations can build dedicated social communities to encourage consumer engagement using features such as forums, blogs, file sharing, calendars, and activity feeds. This allows more effective engagement with customers.

AEM Forms simplifies form filling to speed up form processing: AEM Forms allows organizations to quickly create and publish digital enrollment services, thus reducing the reliance on paper and speeding up the process. This is an important feature for regulated industries, which need to show how they are protecting sensitive customer content. Organizations can continuously measure and optimize experiences to acquire and convert customers across the web and mobile.

AEM Livefyre allows user-generated content to be used on websites: Marketers are able to build dynamic, engaging experiences with user-generated content. By accessing and reusing content that has been shared on the web, organizations can publish better content on their sites, such as examples of DIY projects and content from social network sites, that they would not have the resource to create themselves.

AEM Assets provides extensive DAM capabilities: AEM Assets provides a centralized repository for all digital assets. It includes end-to-end asset workflow, including creation and delivery. It supports interactive rich media and enables multichannel delivery. Assets can easily be imported from a wide range of sources, and the product also connects with creative workflows.

Weaknesses

AEM is an extensive WEM solution, which can make it complex to implement: While AEM provides many of the necessary capabilities for digital experience delivery, it might be regarded as too large and complex by some organizations. Although vendors have been working to make their solutions easier and quicker to implement, professional services may still be required, especially to add integrations to external systems and create customizations. This makes it difficult for small companies to implement enterprise systems, although cloud options simplify the process because there is no infrastructure to deploy.

Opportunities

Cloud offers opportunities for Adobe to increase its market share: An increasing number of organizations are considering cloud for at least some of their WEM requirements. Many of them want not only the cloud infrastructure but also its management as a service. With its SaaS solution, Adobe can benefit from this growing demand for cloud. It is also able to offer hybrid solutions for organizations that are not ready to move to a fully managed service.

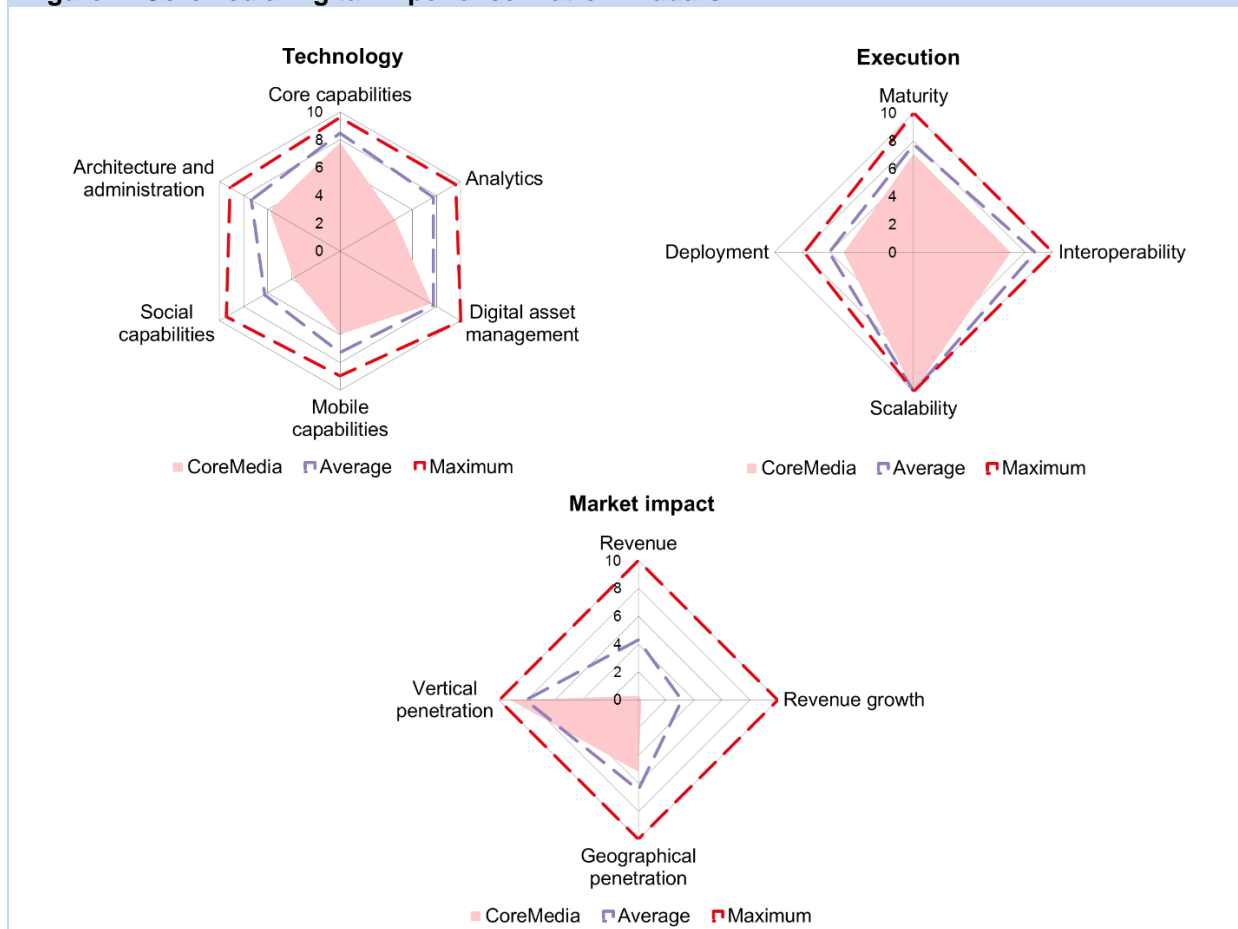
Organizations are looking for complete content lifecycle management: A good WEM solution should be able to manage the complete lifecycle of content, including its creation and eventual retirement. As part of the lifecycle, WEM needs to connect content sources and creators to the ability to deliver experiences, based on context via multiple channels. AEM allows organizations to deliver the right content to the right person at the right time and at an appropriate speed.

Threats

The WEM vendor landscape is crowded: There is a plethora of WEM vendors for organizations to choose from. These include large ECM vendors, specialist WEM vendors, and vendors that are expanding from e-commerce and marketing automation to providing some WEM capabilities. This can make it difficult for vendors to grow their market share.

CoreMedia Digital Experience Platform (Ovum recommendation: Niche vendor)

Figure 7: CoreMedia Digital Experience Platform radars



Source: Ovum

Ovum SWOT assessment

Strengths

CoreMedia Blueprints allow organizations to quickly build and deploy websites: CoreMedia Blueprints are a set of ready-to-deploy starter websites, which include best practices, templates, and pre-built design elements to allow websites to be built and deployed rapidly. Included are multisite, multilanguage, and omnichannel publishing tools. Supported environments include global brand websites, media websites, and augmented B2B and B2C e-commerce websites. CoreMedia Brand Blueprint is available in multiple languages and is based on the popular Twitter Bootstrap framework.

Collaboration features enhanced with content sets and workflows: CoreMedia provides a set of collaboration tools that encompass the entire lifecycle of content – from creation, translation, and revision of content to approval, delivery, and analysis. These tools support both ad hoc creative collaboration and more formal workflows. Business users are able to collaborate based on business functions and roles. Content sets can be defined and shared, published with a single click, or sent for approval.

DAM capabilities included in the platform: CoreMedia provides extensive DAM capabilities, which is something that not all CX (customer experience) vendors provide. A wide range of rich media assets are supported, including images, videos, and PDFs. Product data, unstructured digital content, a media library, and marketing materials can all be managed. Integrated rights management, including expiration dates, provides protection for content. Integration with Adobe Creative Cloud allows design and graphics professionals to work with their tools of choice. Advanced features include automated metadata extraction and product asset linking.

CoreMedia's e-commerce augmentation strategy provides a differentiator: CoreMedia supports multiple integration strategies for its CoreMedia LiveContext solution, allowing organizations to enhance their existing e-commerce stores with content without having to abandon existing business logic and front-end development. It can augment stores built on a variety of commercial e-commerce platforms, including IBM WCS and SAP Hybris, but CoreMedia LiveContext can also be deployed to augment homegrown e-commerce systems. Customers of IBM WCS and SAP Hybris can take advantage of a validated, productized integration, as well as a fixed-price/fixed-scope Express Deployment option, which can get them to a live, new, content-enhanced e-commerce website in as little as 10 weeks. There are also specific capabilities to enhance both B2B and B2C e-commerce websites.

Weaknesses

CoreMedia Digital Experience Platform does not include its own analytics capability:

CoreMedia Digital Experience Platform does not include analytics, which may deter organizations that favor a one-stop-shop approach to WCM. CoreMedia provides integrations with Google Analytics, IBM Digital Analytics, Webtrends, Adobe Analytics, and Nugg.ad, and allows customers to use the analytics product of their choice. CoreMedia Digital Experience Platform is able to take the output from these products and display it through its own dashboards.

Opportunities

CoreMedia is well positioned to build market share through its rapid design and DAM

capabilities: Virtually all organizations need to be able to engage with their customers via multiple channels, including the web, which requires the use of a CX platform. With its Brand Blueprints, which make it easier and quicker to design and deploy websites, CoreMedia is well positioned to pick up additional market share. Its extensive DAM capabilities support the reuse of assets across multiple channels.

IBM Marketing Cloud integration will provide additional opportunities: Built-in integration allows content to be published directly to IBM Marketing Cloud. Included is the ability to create microsites and landing pages, assemble email newsletters, and personalize landing pages based on IBM scoring and newsletter content. This will provide CoreMedia with additional opportunities as not all vendors include this valuable integration capability.

CoreMedia can increase its market share with its cloud offering: CoreMedia has recently launched a cloud service, which it manages on Amazon Web Services (AWS) servers. This is an important development as Ovum research shows there is growing support for the cloud in the ECM space with more than 70% of respondents surveyed by Ovum having already implemented at least one ECM technology in the cloud. Web experience management is a good opportunity for organizations to test the cloud.

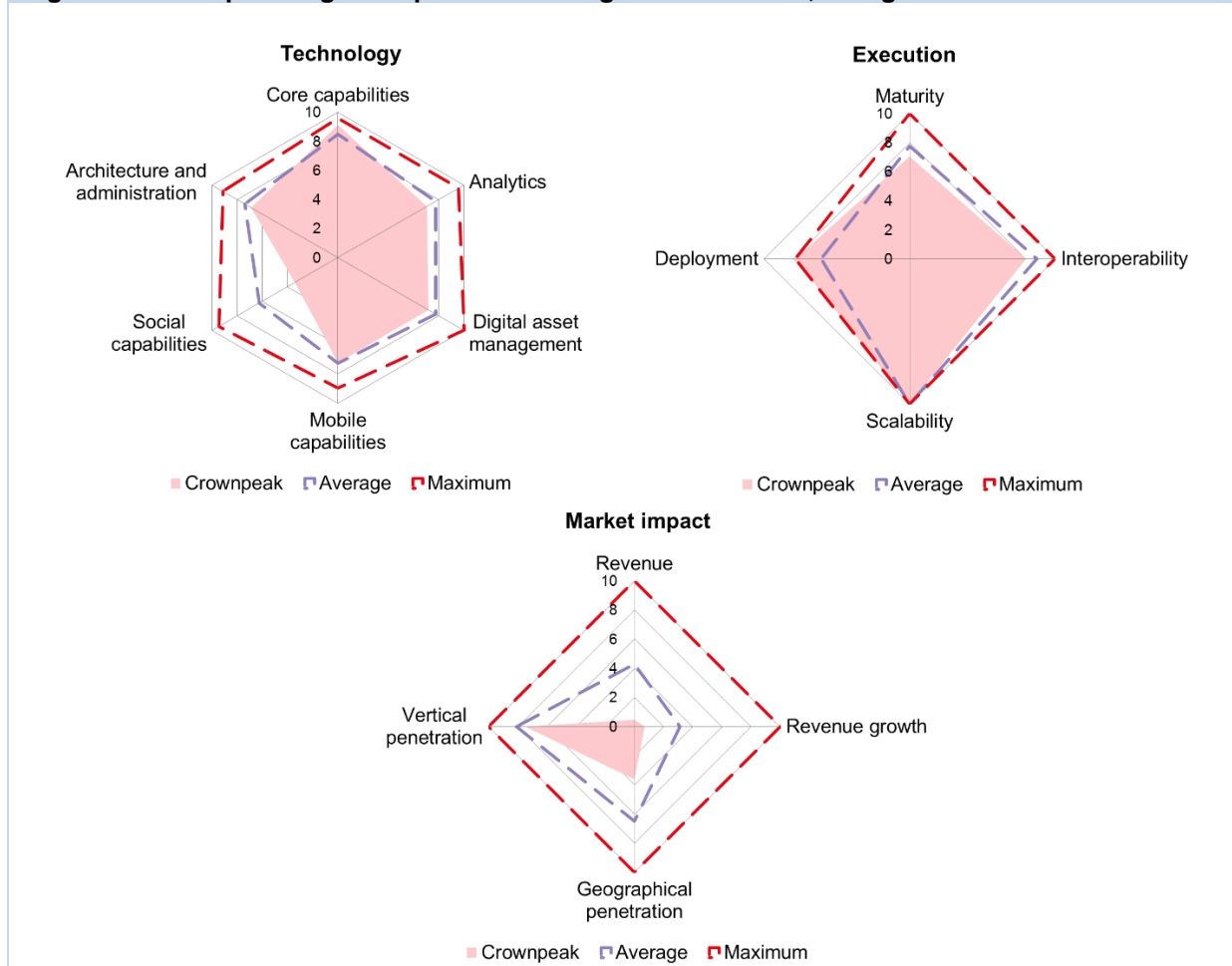
Threats

A large number of WCM products are available: The WCM market space is very competitive, with a large number of products for organizations to choose from. These include standalone products and products with WCM capabilities within ECM platforms. With strong social capabilities, CoreMedia should have an advantage over vendors with less well-developed social features.

ECM vendors have the advantage of providing a single platform for all content management needs: Organizations that prefer a one-stop-shop approach and have implemented ECM are unlikely to deploy a separate WCM system. Ovum would urge organizations to consider whether the WCM system within the ECM platform can deliver the full range of capabilities required. Specialist WCM vendors often provide more extensive features.

Crownpeak Digital Experience Management Platform, Evergreen SaaS (Ovum recommendation: Challenger)

Figure 8: Crownpeak Digital Experience Management Platform, Evergreen SaaS radars



Source: Ovum

Ovum SWOT assessment

Strengths

The product is designed to allow nontechnical users to create and manage digital experiences:

Nontechnical users are able to create, manage, and deploy content across a wide range of channels including websites, mobile applications, social networks, and portals driven by legacy applications. A requirement for minimal user training means authors can start creating content quickly. Version control allows content to be rolled back.

DAM allows management of multimedia assets: Crownpeak DAM allows multimedia assets to be managed centrally for use across all digital channels, regions, teams, and agencies. Users are able to edit assets from within the platform. All the features expected of a DAM system, including version control and access rights and permissions, are included in the product. Assets can be organized by type, metadata tag, and manual collection.

Analytics help drive targeting and personalization: Crownpeak includes analytics to enhance the customer journey. A/B tests can be developed directly from the page editor, enabling marketers to test out the most effective content before making it available to all website visitors. Web Content Optimizer allows business users to develop data-driven, contextualized, and dynamic customer experiences with little or no coding.

Weaknesses

As a cloud-only offering, Crownpeak DXM Platform will not appeal to all organizations:

Although the cloud is gaining traction in the content management space, there are organizations that will not currently consider moving applications and content to the cloud. As a cloud-only solution, Crownpeak will therefore not appeal to all organizations.

Some analytics capabilities require third-party products: Although Crownpeak provides many analytics capabilities, including A/B testing, A/n testing, and targeting in real time, the product easily integrates with third-party analytics products to provide additional capabilities and allow organizations to use existing investments.

Opportunities

Crownpeak DXM Platform is available solely as a cloud service: With rising interest in cloud services in the content management space, Crownpeak is well placed to increase its market share in this lucrative space. The service is delivered on Amazon Web Services (AWS) as multitenant shared services. All customer-specific data and content are managed on a customer-by-customer basis in an isolated stack. Websites and other digital experiences are deployed into customer-specific, dedicated hosting, which can be on Crownpeak's platform (using Amazon), any other hosting service, or even the customer's own premises.

Crownpeak should more effectively market its ability to support the requirements of multinational enterprises with multiple websites: Crownpeak is ideally suited to the requirements of multinational enterprises with multiple websites that need to provide support in different languages. One of Crownpeak's strengths is the provision of a platform that specializes in global multisite management. In order to market these capabilities, Crownpeak needs to raise its profile on a global basis.

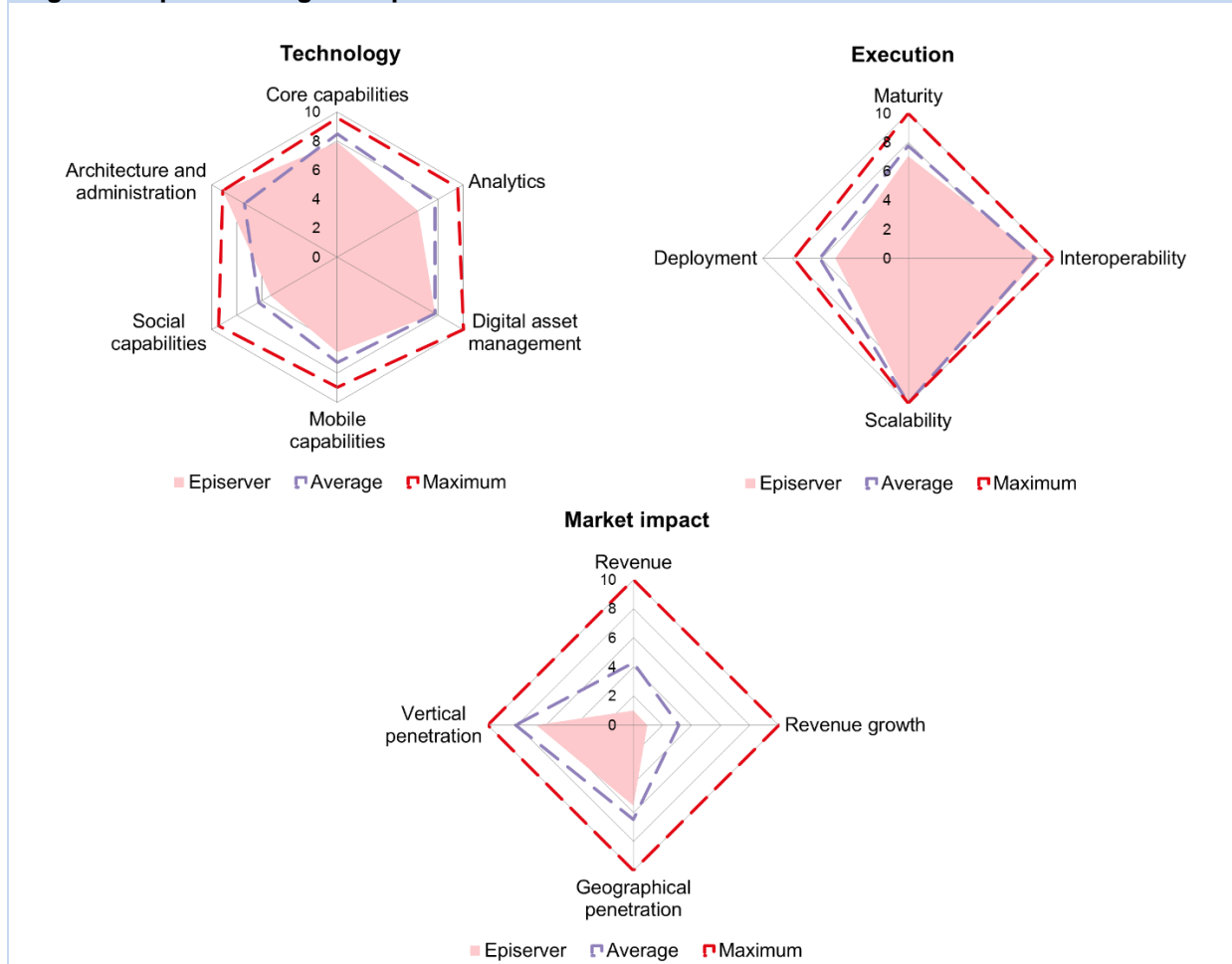
Threats

Crownpeak does not have the profile of some WEM vendors: There are a few high-profile WEM vendors and many that are not as widely known. Crownpeak falls into the latter category. There is a temptation for organizations to go with the few vendors they know, rather than investigate the entire WEM landscape looking for the solutions that best suit their requirements.

The WEM vendor landscape is crowded: There is a plethora of WEM vendors for organizations to choose from. These include large ECM vendors, specialist WEM vendors, and vendors that are expanding from e-commerce and marketing automation to providing some WEM capabilities. This can make it difficult for vendors to grow their market share.

Episerver Digital Experience Cloud (Ovum recommendation: Challenger)

Figure 9: Episerver Digital Experience Cloud radars



Source: Ovum

Ovum SWOT assessment

Strengths

Episerver Digital Experience Cloud provides a single platform for managing digital commerce, content, and digital marketing: Digital Experience Cloud is a .NET PaaS solution built on top of Microsoft Azure. It provides a unified interface, which makes it easy to learn how to use the platform and simple to move between the different components. Episerver easily integrates with other systems via a range of options: .NET API, Web Service API, Service Layer, and REST API.

Episerver Social Reach allows organizations to promote content on social channels: Episerver Social Reach is a free add-on for Episerver Digital Experience Cloud. It allows users to promote their content and marketing messages across all the major social channels including Facebook, LinkedIn, and Twitter. At the same time, they can track all incoming leads originating from those cross-channel campaigns. Episerver also provides examples of how to use the product to integrate and manage a Facebook app, personalize content based on social authentication, and allow visitors to share content.

Analytics capabilities support personalization: Marketers are able to target visitors with page content based on website behavior, geographical information, or information from external systems such as marketing automation and customer data from CRM systems. The recent acquisition of Peerius, an enterprise-class personalization and predictive analytics vendor, has added machine-learning algorithms to Episerver Digital Experience Cloud.

Commerce integration aids both business users and developers: Seamless integration with commerce products allows for the ingestion of catalogs, catalog management, cart, order management, fulfillment services, and customer service. This enables many Episerver Digital Commerce customers to use the solution for online sales without the need for any additional systems.

Weaknesses

Key analytics capabilities are not natively included in the product: Although the product includes many analytics capabilities, it does not provide all the features that many organizations will require. However, the product ships with Google Analytics, which provides the missing features: analyzing how users navigate through websites; drilling down into individual website visits to collect detailed profiling information; recording metrics such as failed logins, failed searches, and dead links; differentiating between new and returning visitors; and recording the number of hits per page.

Social analytics around brand is not provided: Episerver Digital Experience Cloud requires third-party products to provide social analytics for monitoring brand mentions and sentiment. The product also does not provide the ability to track visitors' use of social network websites to help build profiles.

Opportunities

Episerver can provide enhanced customer experiences with its capabilities: Most WEM vendors are able to provide content, context, and profile/persona, but Episerver has added a fourth dimension with catalog. This allows content, catalog, and profile/persona information to be enriched with transactional and clickstream data to form more accurate context, and therefore more effective results, in real time. To this end, Episerver has added data scientists to its research and development team to help improve digital experiences of customers. This will help Episerver to provide next-best digital experiences.

The provision of an ecosystem for federated experience management provides an advantage over the siloed approach: Episerver has an opportunity to gain market share through its ability to take a federated approach to analytics. Some vendors collect all data in a single master repository. However, since several technologies are required to create digital experiences, it does not always make sense to store all data in a single repository. With the ability of its analytics tools to span multiple data stores, Episerver can simplify the process of correlating and interpreting data from multiple channels and applications.

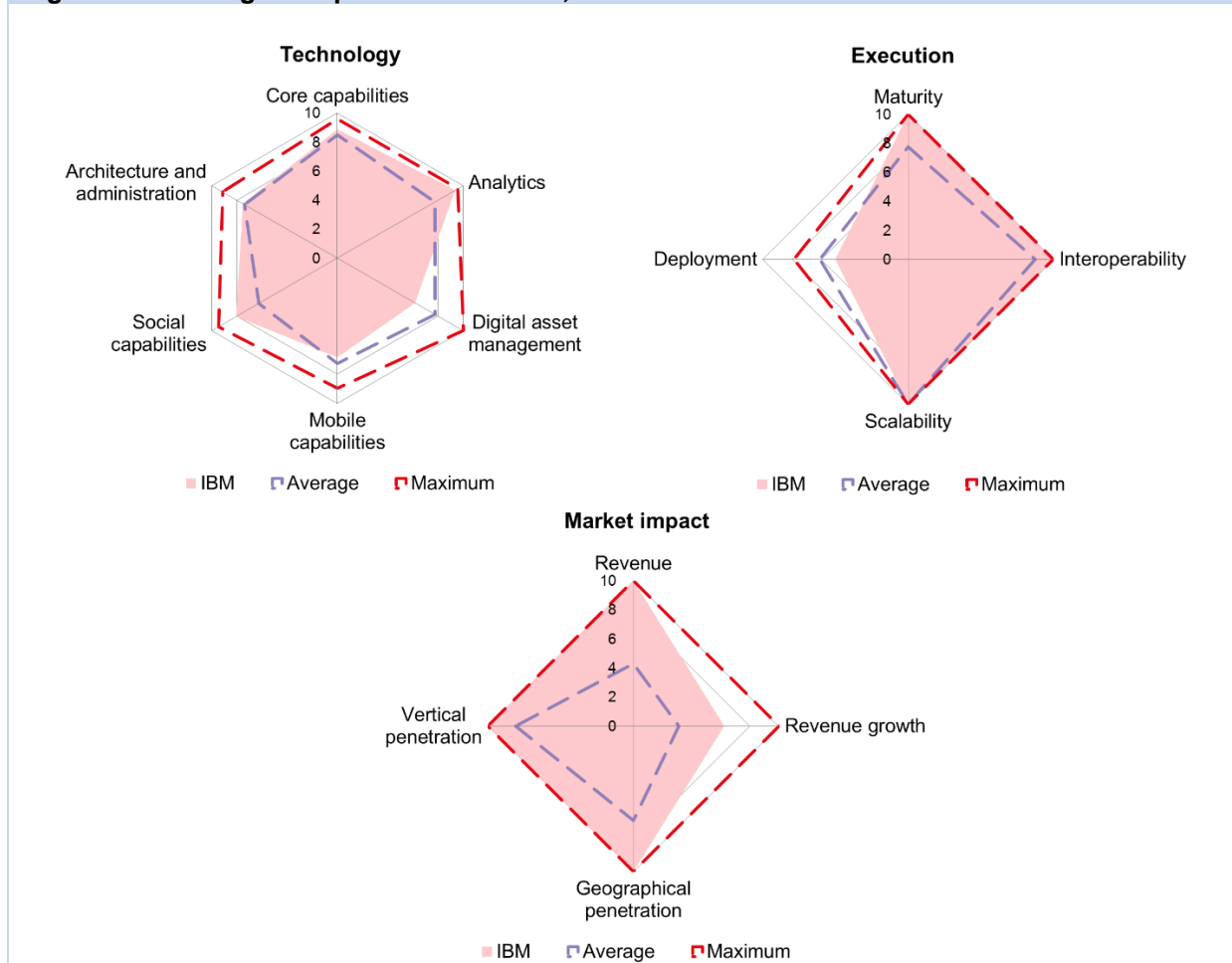
Threats

Episerver competes against vendors that provide end-to-end WEM, marketing automation, and commerce solutions: Pure-play WEM vendors face competition from a few vendors that offer a full range of systems, including WEM and e-commerce. While many organizations are happy to adopt a best-of-breed approach and procure their requirements from a range of vendors, there are some that prefer a one-stop-shop approach and select a single vendor wherever possible.

The WEM vendor landscape is crowded: There is a plethora of WEM vendors for organizations to choose from. These include large ECM vendors, specialist WEM vendors, and vendors that are expanding from e-commerce and marketing automation to providing some WEM capabilities. This can make it difficult for vendors to grow their market share.

IBM Digital Experience Software, v8.5 (Ovum recommendation: Leader)

Figure 10: IBM Digital Experience Software, v8.5 radars



Source: Ovum

Ovum SWOT assessment

Strengths

IBM Digital Experience software has been designed for ease of use: IBM has added features that accelerate content and site assembly. The features include more than 40 common digital patterns such as a rotating carousel banner, landing pages, hero images, hero text, and integration with social networking sites. Components can be dragged and dropped onto web pages, and the site manager feature allows pages to be pre-populated with reusable content, which can be selected as required. In addition, the DAM capabilities allow rich media assets such as video, audio, and images to be ingested from leading digital creative tools, centrally stored, organized, categorized, and transformed.

IBM MobileFirst provides hybrid and mobile application support: IBM Digital Experience software includes a number of features that support a mobile-first strategy, including a responsive design that optimizes authentication, navigation, and layout by detecting the general device class and resolution. IBM MobileFirst includes mobile application support for customers wishing to distribute mobile apps through stores such as Apple App Store, Android Marketplace, Microsoft App Store, and corporate app stores.

Integration capabilities allow line-of-business apps to be easily integrated: IBM Digital Experience software is an integrated solution that brings together all the capabilities required to deliver digital experiences for customers, employees, and partners. Also included are integrations to allow information from existing systems, such as SAP, Siebel, PeopleSoft, SharePoint, custom web applications, web services, representational state transfer (REST) services, and relational databases, to be combined to enhance digital experiences. User interface integration allows information from integrated applications to be viewed through the IBM Digital Experience software interface. The Digital Data Connector allows external information that resides in other repositories to be used as content.

Weaknesses

The size of IBM's portfolio might be too extensive for some organizations: IBM provides an extensive portfolio, which includes marketing automation and e-commerce solutions, as well as extensive WEM capabilities. Organizations that have limited requirements might find the features and functions too extensive, and those that prefer a best-of-breed approach may be deterred from implementing a solution from a single vendor. However, by having a cloud option, IBM has made it easier for small companies to implement an enterprise solution.

Opportunities

IBM can broaden its customer base with its cloud option: IBM Digital Experience on Cloud is a hosted, fully managed digital experience platform. IBM services take care of operations, health monitoring, upgrades, and application deployments. Contracts are annual with renewal on a monthly basis after the initial term. Organizations are able to build and deliver socially aware, omnichannel experiences for customers, partners, and employees. This provides a cost-effective solution for small organizations, which do not have the resources or the budget required to implement enterprise systems on-premise.

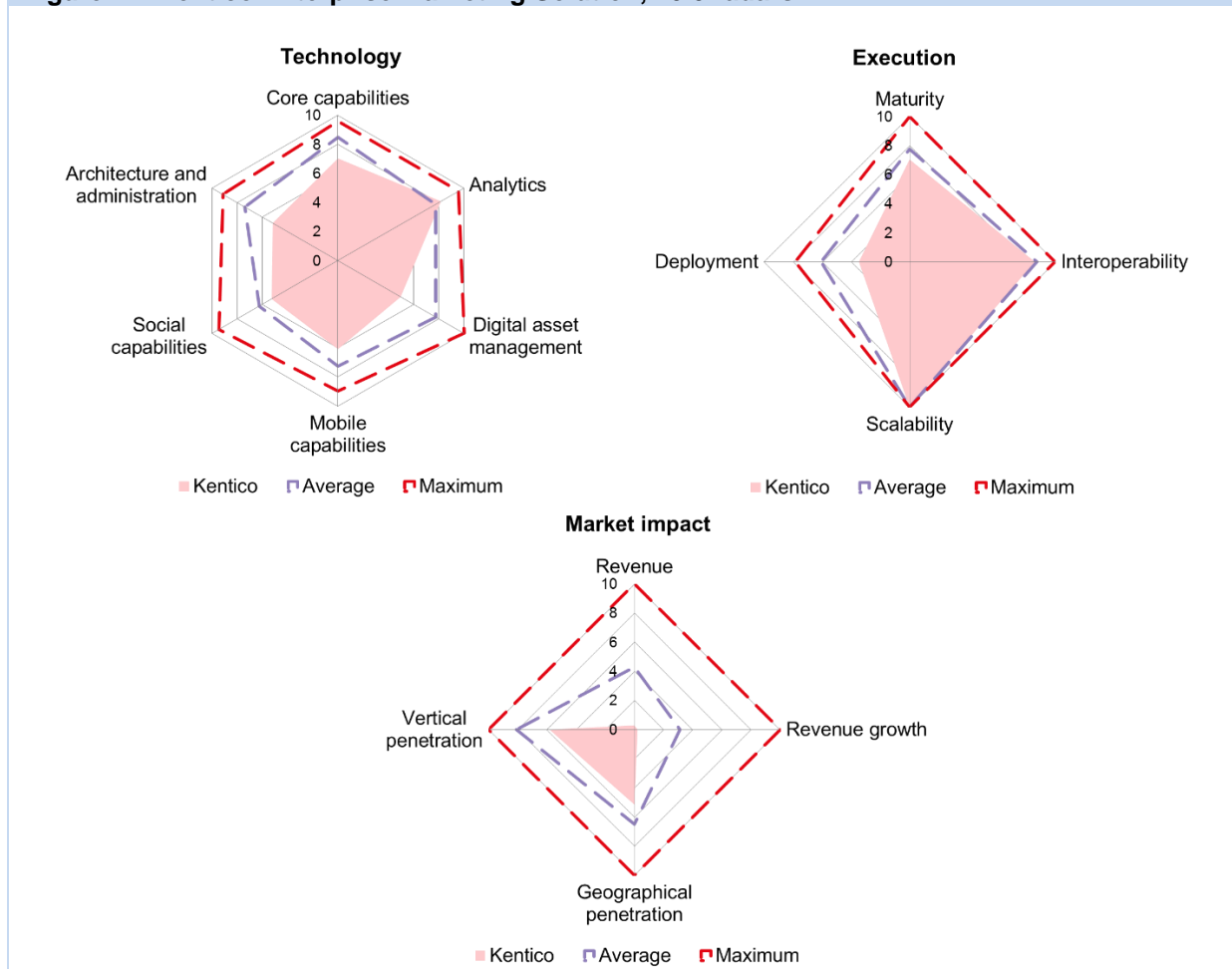
IBM can exploit the desire for targeted content: IBM Digital Experience solutions capture 21 site visitor data points to help organizations provide highly relevant content. It integrates with IBM Digital Analytics and leading third-party web analytics solutions including Webtrends and Adobe SiteCatalyst. Overlay reports provide information such as the number of unique visitors in a specified time. For advanced multivariate testing and optimization, IBM has partnered with Optimizely, SiteSpect, and Monetate. Not all WEM vendors provide their own analytics capabilities, and the strength of IBM's analytics and its innovation in this area should help it to grow its customer base.

Threats

The WEM vendor landscape is crowded: There is a plethora of WEM vendors for organizations to choose from. These include large ECM vendors, specialist WEM vendors, and vendors that are expanding from e-commerce and marketing automation to providing some WEM capabilities. This can make it difficult for vendors to grow their market share.

Kentico Software, Kentico Enterprise Marketing Solution, 10.0 (Ovum recommendation: Niche vendor)

Figure 11: Kentico Enterprise Marketing Solution, 10.0 radars



Source: Ovum

Ovum SWOT assessment

Strengths

Marketing automation features are included: A number of features are included, which while not providing an entire marketing automation solution, will satisfy the requirements of many midsized organizations. Rules-based conditions can be set within processes to determine the content that each visitor is shown at each stage of visit, which makes it ideal for campaigns. Emails can also be incorporated into processes, providing support for the sales process. In addition, organizations can engage through social channels with the ability to push content out to social networks.

A/B testing is provided: Kentico EMS provides A/B testing to allow organizations to experiment with different content and page layouts to determine which is the most effective, and therefore optimize their content. Start and end dates can be used as can a first-past-the-post approach to find the winner. Segmentations can be used to determine who receives which content, or it can be completely random. Tracking elements such as landing pages can be introduced to help monitor the effectiveness of the test. A/B testing is also available for email messages.

Kentico EMS has been designed for multisite management: Multiple sites are managed from a single central location. Multilingual support allows localizations to be created while corporate branding is maintained. Translation workflows allow content to be sent out to third parties, while the progress can be monitored from within the system.

Weaknesses

Does not include social network monitoring capabilities: Kentico EMS does not include the ability to monitor social network sites, meaning organizations will need to implement a third-party product to be able to monitor social networks to ensure that they can speedily respond to negative brand mentions.

Kentico EMS does not include a full DAM product: While the functionality provided within Kentico DAM will satisfy the requirements of many companies, it is not a full DAM system and will therefore not be suited to organizations that have complex DAM requirements and huge libraries of images and other content to manage. However, as many such organizations will already have implemented a standalone DAM system, which they will integrate with Kentico EMS, this is not a huge problem.

Opportunities

Kentico EMS allows organizations to quickly react to changing market conditions: Kentico is in a strong position to benefit from the need of organizations to be more agile and quickly adapt to changing conditions in the market. Kentico EMS provides an open API and flexible customizations, allowing organizations to easily integrate their existing ecosystem with Kentico EMS to provide speedier implementation.

Kentico can take advantage of the desire of organizations to simplify digital marketing: Kentico EMS provides a fully integrated solution, which gives marketers access to an extensive set of tools from a single location. Information is shared across all marketing tools, and the product integrates with existing CRM and ERP systems, eliminating problems of inconsistent customer data across multiple silos. This presents a good opportunity for Kentico to provide an all-in-one solution to organizations looking to reduce the number of products they require for WEM.

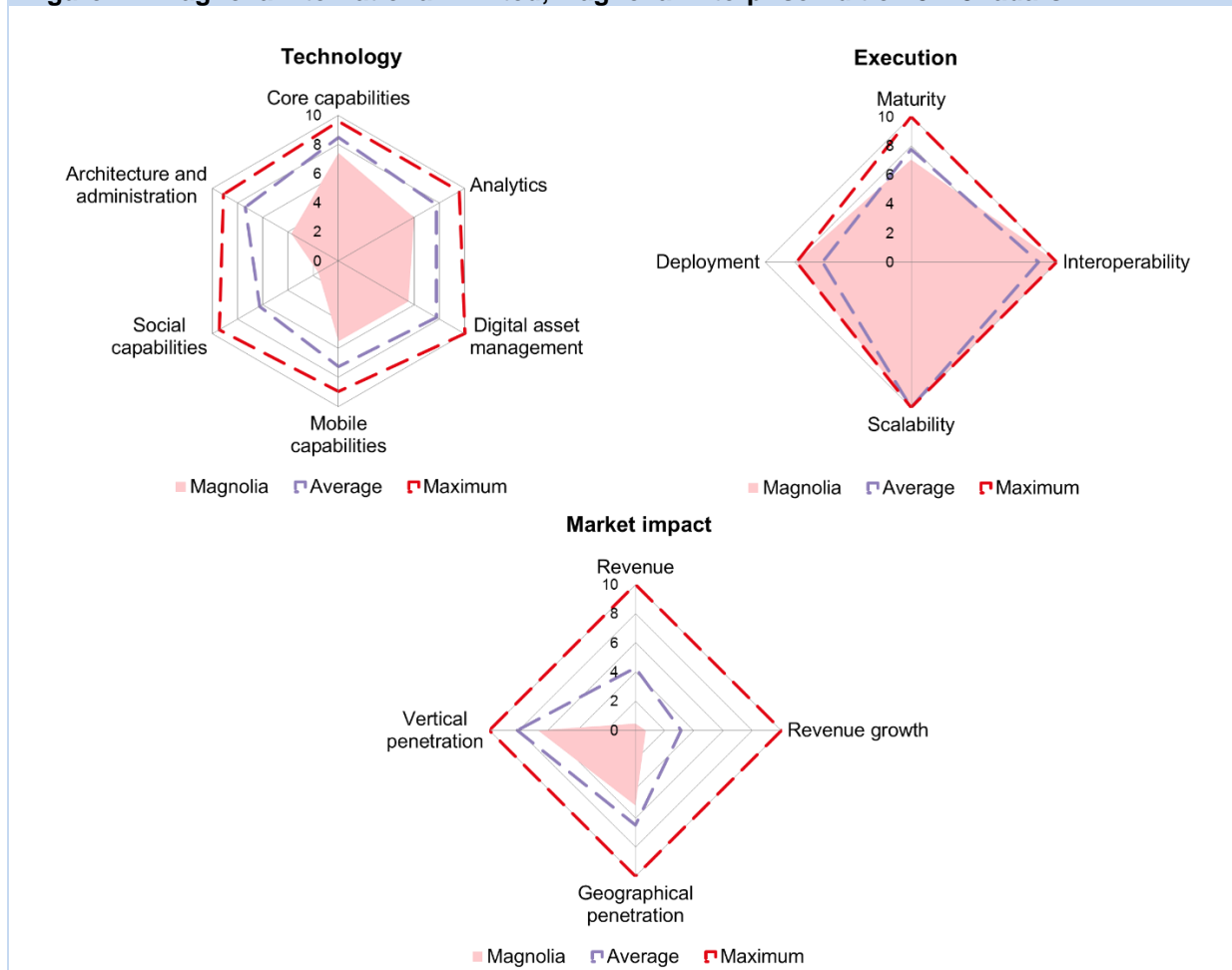
Threats

Kentico competes against vendors that provide end-to-end WEM, marketing automation, and commerce solutions: Pure-play WEM vendors face competition from a few vendors that offer a full range of systems, including WEM and e-commerce. While many organizations are happy to adopt a best-of-breed approach and procure their requirements from a range of vendors, there are some that prefer a one-stop-shop approach and select a single vendor wherever possible.

The WEM vendor landscape is crowded: There is a plethora of WEM vendors for organizations to choose from. These include large ECM vendors, specialist WEM vendors, and vendors that are expanding from e-commerce and marketing automation to providing some WEM capabilities. This can make it difficult for vendors to grow their market share.

Magnolia International Limited, Magnolia Enterprise Edition 5.4.8 (Ovum recommendation: Niche vendor)

Figure 12: Magnolia International Limited, Magnolia Enterprise Edition 5.4.8 radars



Source: Ovum

Ovum SWOT assessment

Strengths

Magnolia supports the rapid development of web experience scenarios: Magnolia has improved the usability for developers in the latest release of the product, making it easier for non-Java developers to use the platform. Light development features make it easy for developers to build front-end experiences and customize the back end using existing tools and skills.

Functionality is displayed as smartphone-inspired apps: Magnolia has abandoned the toolbars that are normally associated with WCM systems and has adopted a more mobile-friendly app system for selecting features, which is easy to learn and use. Applications are displayed as tiles, and the active community helps to extend the product through the development of additional apps.

Integration capabilities make the product ideal for complex digital experience projects: The integration capabilities, which are based on open standards, open source, an open architecture, and open APIs, make the product easy to customize. Developers are able to integrate with third-party

solutions and data sources. Integrations are provided with market automation, e-commerce, and CRM systems.

Multisite management is fully supported: Magnolia includes several features that are required for the management of multiple websites. It provides the centralized management of multiple websites, translation management features, and includes workflow that allows translation steps to be included within processes. Local support is also provided for a wide range of languages.

Weaknesses

Only lightweight DAM capabilities are included: Magnolia includes some DAM capabilities, and while these are sufficient for many organizations that have mainly images to manage, organizations with large volumes of digital assets comprising a multitude of different types will require a specialist DAM system. However, Magnolia does integrate with third-party DAM systems.

Limited social capabilities provided: Magnolia includes some social features, but it does not provide any analytics that allows organizations to monitor brand mentions or build profiles of their visitors based on their social network use. Organizations will need to implement third-party products to monitor social activity because this is a feature that all organizations require in order to respond in a timely fashion to negative brand comments.

Opportunities

Magnolia can exploit its open source credentials to increase its market share: Open source is currently in the ascendancy, with many governments actively encouraging public sector bodies to adopt open source products wherever possible. As an open source vendor, Magnolia has an opportunity to not only extend its reach in the public sector but also increase its market share in the private sector where the use of open source is rising.

Magnolia offers digital experience management as a service: Many of Magnolia's customers require turnkey digital experience solutions. Magnolia's service is based on its existing product, which provides some of the most requested scenarios from its customers. This is a good opportunity for Magnolia to extend its market reach by providing a service that matches the requirements of organizations in many vertical markets, and the vendor should extend the number of scenarios it addresses to maximize its reach.

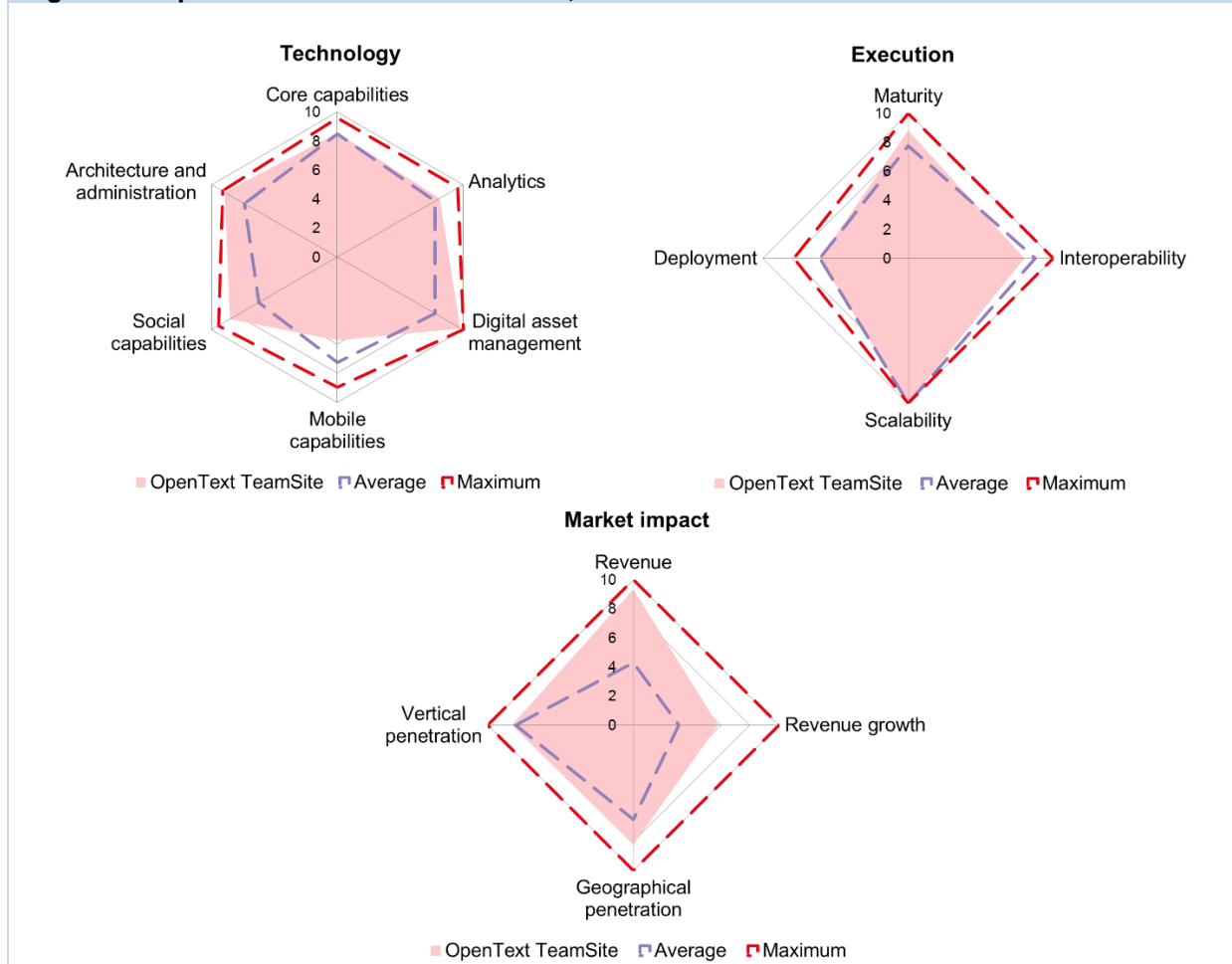
Threats

Magnolia may be regarded as a "techie" platform for developers by some organizations: Past versions of Magnolia relied heavily on developers with technical skills to create digital experiences. The vendor has now simplified its platform, and its light development features make it easier to customize the platform and create applications. However, Magnolia needs to inform organizations that may have considered but not selected Magnolia in the past that they do not need Java skills to develop applications using this platform.

The WEM vendor landscape is crowded: There is a plethora of WEM vendors for organizations to choose from. These include large ECM vendors, specialist WEM vendors, and vendors that are expanding from e-commerce and marketing automation to providing some WEM capabilities. This can make it difficult for vendors to grow their market share.

OpenText TeamSite and LiveSite, 8.2 (Ovum recommendation: Leader)

Figure 13: OpenText TeamSite and LiveSite, 8.2 radars



Source: Ovum

Ovum SWOT assessment

Strengths

TeamSite is designed for nontechnical users to create and publish content: A tile-based interface, Experience Studio, allows users to drag and drop assets, reuse page templates and components, and automatically scale content for mobile devices. Thumbnail image previews enable sites, apps, pages, and templates to be quickly located.

Extensive personalization features are included in the portfolio: From the profile information collected using functionality within the portfolio, relevant information can be automatically delivered to customers across any touchpoints. Full integration of TeamSite with OpenText Optimost allows campaigns to be coordinated across multiple channels through a single interface. OpenText Optimost provides comprehensive A/B and multivariate testing to enable targeting and personalization. This integration means users can create tests using published TeamSite content, track performance analytics, and compare results.

Real-time analytics allows dynamic personalized content to be delivered: Real-time, in-context analytics allows personalized, targeted content to be delivered to individual site visitors. Integrated analytics provides insights from profiled information about known and anonymous visitors, which allows marketers to create segmentations for campaigns.

OpenText MediaBin provides extensive DAM capabilities: OpenText MediaBin, which is fully integrated with TeamSite, provides extensive DAM capabilities, including the ability to convert speech to text, making it easier for users to locate content in media such as video.

Weaknesses

TeamSite has a limited number of connectors to third-party products: There are a limited number of connectors to e-commerce, marketing automation, and CRM products. This means that organizations may need to create their own connectors.

OpenText has a large portfolio with some duplication, which may confuse potential customers: With the addition of TeamSite, OpenText now has a large portfolio of WEM products, including OpenText WEM. There are also two DAM products. This will undoubtedly confuse potential customers while deciding which product is the closest fit for their requirements, although OpenText believes that each product is suited to a different type of customer.

Opportunities

The need for increasing automation in the targeting and personalization process will provide opportunities for OpenText: With the window for organizations to convert visitors to customers shrinking, automation in analytics platforms that turn data into insight, allowing automatic, real-time targeting and personalization, is becoming a requirement for organizations that wish to remain competitive. By continuing to evolve its software-as-a-service (SaaS)-based Optimost platform, OpenText is in a good position to be at the forefront of such developments.

OpenText's large portfolio offers opportunities to provide more of the functionality required to support the full lifecycle for customer interaction management: OpenText has a large portfolio of products that support the entire customer lifecycle beyond the digital experience management capabilities offered by TeamSite. These include optimization (Optimost), contact center (Qfiniti), social (Tempo), customer communications (StreamServe Communications Center), and big data analytics (Actuate iHub) applications.

OpenText should target marketers rather than IT in the buying process: Marketers are increasingly the decision-makers when it comes to buying digital experience management systems. OpenText therefore needs to address the requirements of nontechnical users by allowing them to easily create content, presentation, and personalization without IT intervention. TeamSite manages these requirements of marketers well with its focus on usability, which should make it easy to demonstrate the capabilities and benefits to nontechnical buyers.

Threats

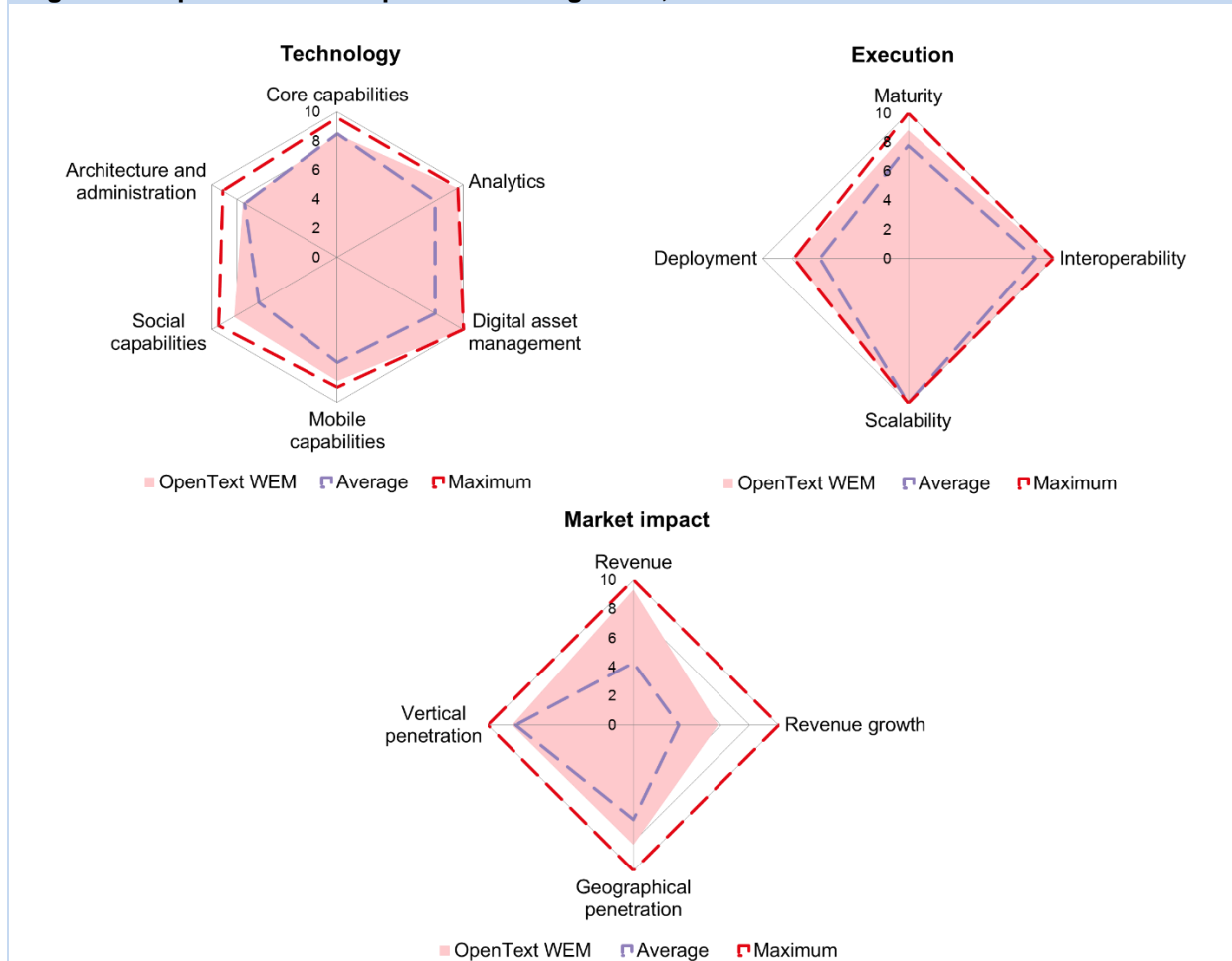
OpenText WEM is an alternate contender: OpenText TeamSite can be evaluated against another OpenText product, WEM. There is little differentiation in the WEM space, and it is particularly difficult for products from the same vendor. OpenText has positioned TeamSite as its WEM offering inside its Experience Suite for advanced market-led innovation in delivering the continuous customer journey. OpenText WEM will continue to have a customer-led roadmap for specific industries and integration

needs. When considering a product from a vendor that maintains multiple WEM products, organizations can have a difficult time deciding which product to implement.

The WEM vendor landscape is crowded: There is a plethora of WEM vendors for organizations to choose from. These include large ECM vendors, specialist WEM vendors, and vendors that are expanding from e-commerce and marketing automation to providing some WEM capabilities. This can make it difficult for vendors to grow their market share.

OpenText Web Experience Management, 1 (Ovum recommendation: Leader)

Figure 14: OpenText Web Experience Management, 1 radars



Source: Ovum

Ovum SWOT assessment

Strengths

OpenText WEM provides an enterprise-grade solution for creating and managing web content:

OpenText WEM supports all organizational customer-centric touchpoints, including intranet and extranet. It provides a transaction-oriented solution, which scales across an organization and addresses the requirements for mobile, social, and video content. With OpenText WEM supporting a responsive design, marketers are able to create content for a wide range of mobile devices to meet

the growing number of users that require mobile access. OpenText WEM focuses on creating a responsive design that supports not only different screen sizes but also adaptive layouts and navigation (by being search engine friendly), and provides selective content experiences by device.

Analytics helps in personalization and targeting of content: Analytics allows the reporting of a wide range of website statistics, including the usage of pages, content, and behaviors, as well as information on how individual users navigate through a site, allowing marketers to personalize content, build personas for segmentation, and develop campaigns.

Extensive personalization features are included in the portfolio: Using profile information collected with functionality within the portfolio, relevant information can be automatically delivered to customers across any touchpoints. Full integration of OpenText WEM with OpenText Optimost allows campaigns to be coordinated across multiple channels through a single interface. OpenText Optimost provides comprehensive A/B and multivariate testing to enable targeting and personalization. The integration means users can create tests using published OpenText WEM content, track performance analytics, and compare results.

Weaknesses

OpenText WEM has a limited number of connectors to third-party products: There are a limited number of connectors to e-commerce, marketing automation, and CRM products. This means that organizations might need to create their own connectors. However, with an integration framework, organizations are able to integrate any relevant back-office applications or external services. Examples of existing integrations are Twitter, Facebook, Gigya, DocuSign, Translations.com, Disqus, ScribbleLive, OpenText ContentServer, OpenText DAM, and SAP Hybris.

OpenText has a large portfolio with some duplication, which might confuse potential customers: With the addition of OpenText TeamSite to its portfolio, OpenText now has a large portfolio of WEM products. There are also two DAM products, OpenText Media Management and OpenText MediaBin. This will undoubtedly confuse potential customers while deciding which product is the closest fit for their requirements, although OpenText believes that each product is suited to a different type of customer.

Opportunities

Business professionals are served by a single, user-friendly platform with ease of use as its focus: OpenText has a good opportunity to increase its market share with a platform that allows business users to quickly and easily develop multichannel digital experiences by using personalization based on multichannel analytics and customer interaction. By automating many business processes and making it easier to reuse and target content, including rich media across any touchpoint, OpenText has made it easy for marketers to create content, styling, presentation, and personalization without IT intervention.

OpenText is well positioned to address a requirement for real-time engagements: OpenText enables real-time interactions by providing intelligent systems, including powerful analytics capabilities, which automatically convert data into insight to provide enhanced customer experiences.

Threats

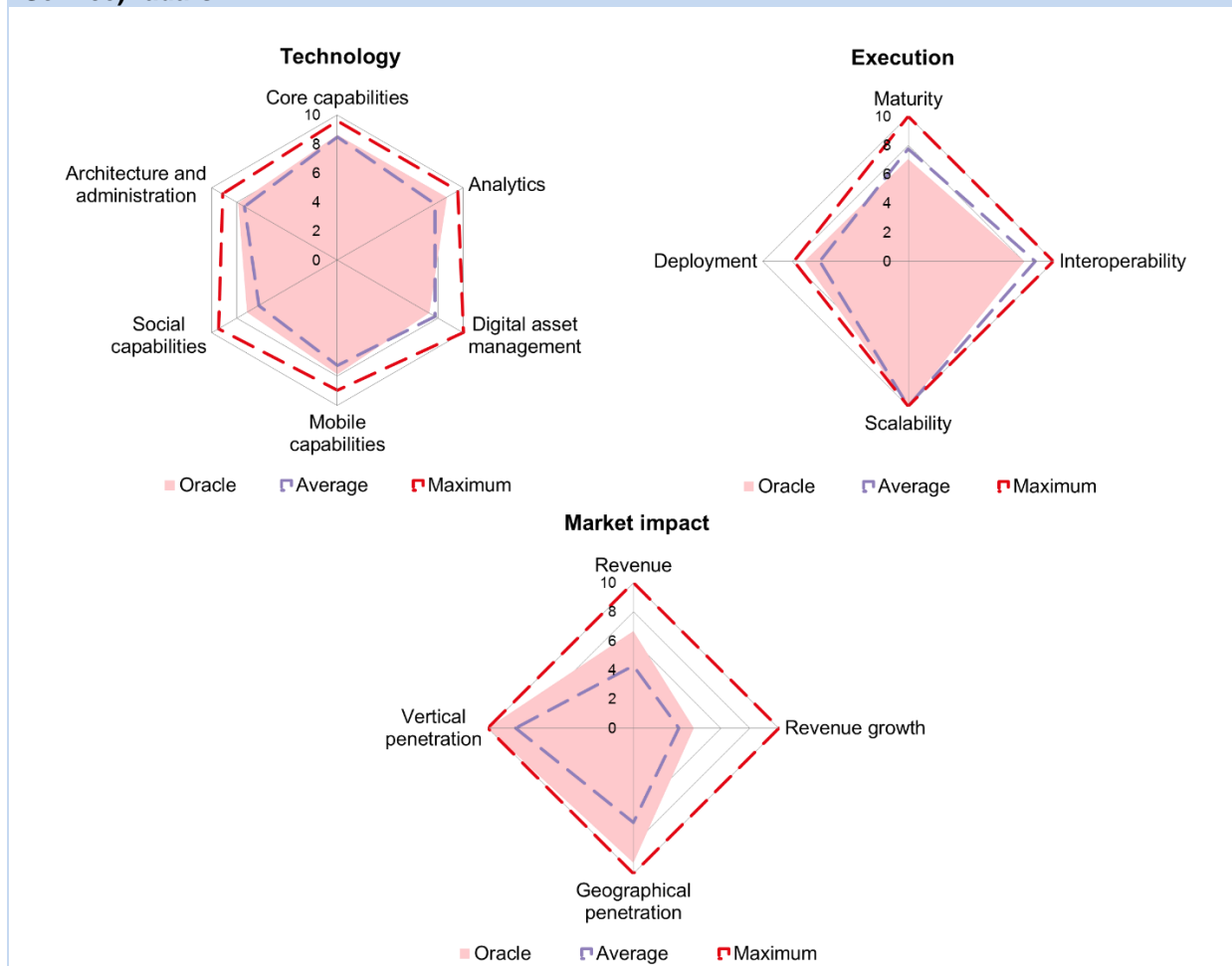
OpenText TeamSite is an alternate contender: OpenText WEM can be evaluated against another OpenText product, TeamSite. There is little differentiation in the WEM space, and it is particularly

difficult for vendors with multiple products. OpenText has positioned WEM to extend its Experience Suite to specific industries and scenarios. However, the temptation is to integrate add-on products from the vendor's portfolio with each of its WEM products. This makes for even less differentiation, and it can make it difficult for organizations to decide which product they should implement.

The WEM vendor landscape is crowded: There is a plethora of WEM vendors for organizations to choose from. These include large ECM vendors, specialist WEM vendors, and vendors that are expanding from e-commerce and marketing automation to providing some WEM capabilities. This can make it difficult for vendors to grow their market share.

Oracle Web Experience Management (WebCenter Sites 12.2.1.1.0 and Sites Cloud Service) (Ovum recommendation: Leader)

Figure 15: Oracle Web Experience Management (WebCenter Sites 12.2.1.1.0 and Sites Cloud Service) radars



Source: Ovum

Ovum SWOT assessment

Strengths

Templating framework is provided: A modular, componentized templating framework is provided for building websites. This is essential for the reuse and repurposing of site components. Some templates are provided out of the box, which can be used by nontechnical users to create sites rapidly. Responsive and adaptive templates with multiple device layouts assigned to the same asset are supported, with the ability to auto-detect the best template to render content based on device detection.

Multisite and multilingual support are included in Oracle WebCenter Sites: Multiple sites are managed from a single point of administration. Websites can be copied easily with assets shared between sites. Translations are managed from within the system through workflows, with support provided for both global and local content.

Support is included for the complete lifecycle management of content: An approvals system allows content and/or pages to be approved before publication. Approvals can be tied to workflows, which have been created and administered in Oracle WebCenter Sites. Included with Approvals is dependency management to ensure link integrity. The approval system applies to data, data definition, and programmatic components.

WEM capabilities are extended with a range of platform-as-a service (PaaS) and software-as-a-service (SaaS) extensions: In addition to core WCM capabilities, Oracle provides a full digital experience suite of products covering marketing automation (Eloqua; Responsys; BlueKai; and Commerce, formerly ATG and Endeca), collaboration (Document Cloud), mobility apps (Mobile Cloud Service), process automation (Process Cloud), sales and service automation (Sales Cloud and Service Cloud), and Portal (WebCenter Portal).

Weaknesses

Integrations with marketing automation and e-commerce products are confined to Oracle applications: Connectors are provided for marketing automation and e-commerce products, but these are only from Oracle. While these are widely deployed products, the company also needs to develop connectors to a range of third-party products because not all customers will want to use Oracle products for all their marketing requirements. However, Oracle does offer extensive APIs to support integrations with other systems.

Opportunities

Oracle can benefit from the increase in cloud adoption: Oracle offers multiple deployment options. In addition to on-premise, a number of cloud options are available. These include being hosted in Oracle Cloud using infrastructure and application server services, being fully hosted and managed in the cloud, and a multitenant SaaS option. In addition, there are various hybrid options where some components can be hosted in the cloud while others remain on-premise. With a variety of options available, Oracle is well positioned to benefit from increased interest in cloud. The multitenant version opens up Oracle to small organizations, which previously would not have been able to afford an Oracle solution.

Oracle has opportunities to sell WEM to organizations wanting more flexible ways of managing content: Oracle is providing more flexible ways to manage content and interact with multiple systems

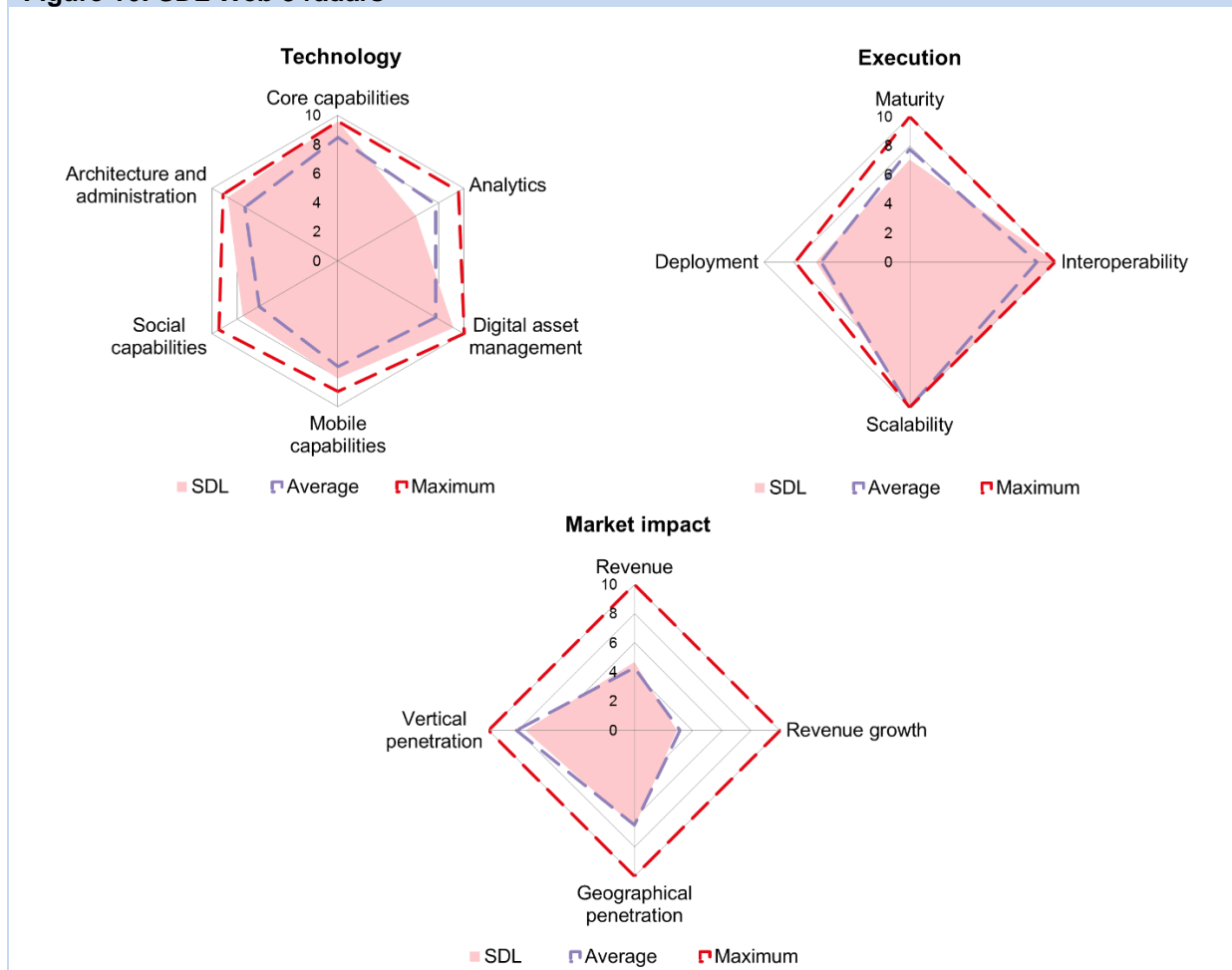
that consume content in a world of multiple channels, including mobile, digital signage, social, and Internet of Things (IoT). New business requirements demand different ways of working. Features such as mobile collaboration through Document Cloud provide this flexibility, making it easier for multiple people to work and comment on web content simultaneously.

Threats

The WEM vendor landscape is crowded: There is a plethora of WEM vendors for organizations to choose from. These include large ECM vendors, specialist WEM vendors, and vendors that are expanding from e-commerce and marketing automation to providing some WEM capabilities. This can make it difficult for vendors to grow their market share.

SDL Web 8 (Ovum recommendation: Leader)

Figure 16: SDL Web 8 radars



Source: Ovum

Ovum SWOT assessment

Strengths

SDL Web focuses on four main product areas to drive companies' online presence: SDL Web provides WCM to create, manage, categorize, approve, and deliver web content across channels, devices, brands, products, and languages; digital media management to manage, enrich, convert,

publish, distribute, and track video and rich media assets in a cloud-based environment; experience optimization, which combines web-session data with customer data to deliver a tailored personalized experience in real time; and localization to create, manage, and deliver multilingual and local online content for a mix of global brand consistency with locally relevant content.

BluePrinting manages content relationships and dependencies across languages, brands, and channels: BluePrinting helps to ensure consistent communications across channels, languages, brands, and devices. All content can be centrally managed consistently and over the long term with users being prevented from changing corporate content (except for translations), while being able to create local content.

Componentized content management creates autonomous, reusable components: All digital assets, which can comprise a wide range of types including text, images, layout, and video, are managed as autonomous, reusable components. This allows marketers to mix and match content to create the optimal combination for each scenario using an intuitive interface without any IT intervention. Content can be delivered to microsites and campaign pages across multiple channels. Integration with external repositories allows external content to be used without the need for duplication.

Weaknesses

Third-party web analytics may be required: While SDL provides a large number of analytics capabilities, either within the product or through an add-on product, some features such as monitoring the number of visitors to a website, allowing users to drill down into individual website visits to collect detailed profiling information, and recording metrics such as failed logins, failed searches, and dead links require a third-party analytics product. This is not a huge problem as there are analytics products that are available for free, and many organizations choose to implement a third-party analytics product in a best-of-breed approach.

Opportunities

Flexible deployment options provide an opportunity for SDL to increase its market share: SDL Web is available on-premise, as a cloud service, or as a hybrid model. The availability of a cloud option will appeal to small organizations, which do not have the budget or the resources to implement a WEM solution on-premise. This should help SDL to increase its market share by appealing to a new audience. Many large enterprises are also currently considering cloud deployments, and WEM is an ideal area to try a cloud environment, particularly as WEM can be run in a hybrid environment, where sensitive data remains on-premise.

SDL provides important components for customer engagement and will benefit from best-of-breed approaches: As a provider of WEM capabilities, SDL has the opportunity to increase its market share from organizations that prefer a best-of-breed approach to customer engagement solutions. There are few vendors that can provide end-to-end solutions, and as a result the majority of organizations will need to deploy solutions from a number of vendors. With strong WEM capabilities and its translation services, SDL is well positioned to be an important part of organizations' customer engagement solutions.

Threats

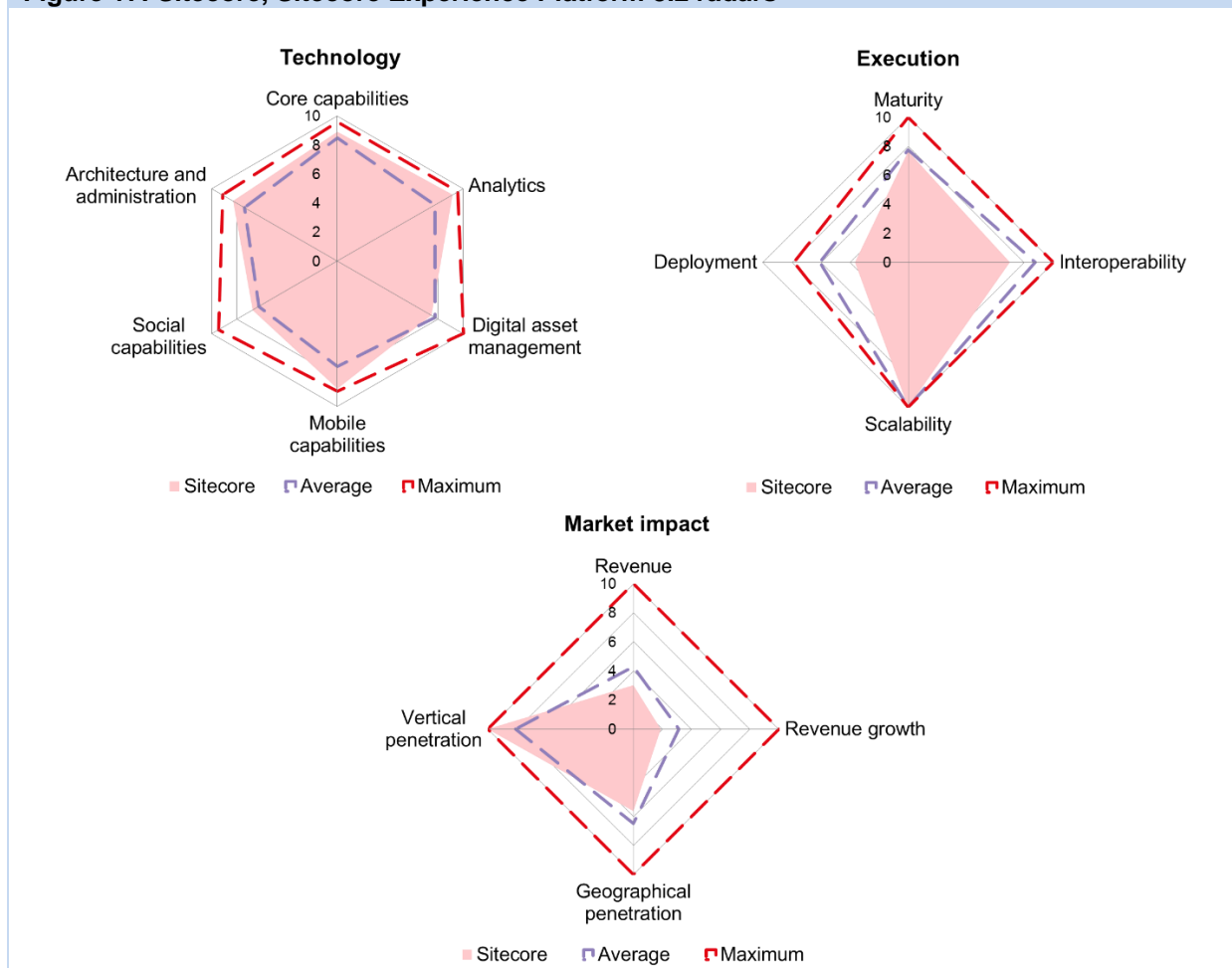
SDL competes against vendors that provide end-to-end WEM, marketing automation, and commerce solutions: Pure-play WEM vendors face competition from a few vendors that offer a full

range of systems, including WEM and e-commerce. While many organizations are happy to adopt a best-of-breed approach and procure their requirements from a range of vendors, there are some that prefer a one-stop-shop approach and select a single vendor wherever possible.

The WEM vendor landscape is crowded: There is a plethora of WEM vendors for organizations to choose from. These include large ECM vendors, specialist WEM vendors, and vendors that are expanding from e-commerce and marketing automation to providing some WEM capabilities. This can make it difficult for vendors to grow their market share.

Sitecore, Sitecore Experience Platform 8.2 (Ovum recommendation: Challenger)

Figure 17: Sitecore, Sitecore Experience Platform 8.2 radars



Source: Ovum

Ovum SWOT assessment

Strengths

Sitecore provides a single, connected platform: Sitecore Experience Platform is a single, fully connected customer experience platform, which combines WCM, personalization, application integration, marketing automation, email marketing, social media, commerce, optimization, and analytics. It also integrates with other customer-facing platforms such as ERP, CRM, customer

satisfaction, and non-Sitecore websites. All interactions are captured from these systems and a single view of the customer is created in a big data marketing repository (Experience Database). This single view is then shared with all of these systems.

Enhanced personalization and context marketing capabilities support the customer journey:

Marketers are able to collect and analyze key customer attributes, based on customer location, device, and behavior, in real time. These attributes can be integrated with purchase history, demographic data, behavioral trends, and activity across different touchpoints. This allows marketers to provide personalized experiences and automate activities across multiple touchpoints to increase conversion and customer satisfaction.

Sitecore Commerce is fully integrated to provide additional capabilities: Sitecore Commerce provides catalog, inventory, and order capture functionality, making commerce-specific interactions available in Sitecore Experience Platform. In addition, users are able to edit merchandise in bulk. The product can be deployed on-premise or in the Microsoft Azure cloud.

Weaknesses

Extensive portfolios introduce a complexity not present in less functionally rich products: A criticism of large portfolios of products is that they can be complex to implement, often requiring external resources and long deployment times. Sitecore can be deployed in cloud and on-premise. Deploying in cloud will remove some of the complexity of the implementation. The product can also be easily customized, which means that the administrator only needs to enable the functionality required by users, with the rest of the functionality hidden.

Organizations that require extensive DAM capabilities may need an add-on DAM system:

Although Sitecore offers many DAM capabilities, there are some pieces of functionality that require a third-party product, such as support for video. Third-party products are also required for the management of licenses. This is an important element for organizations with large volumes of assets that are subject to licensing agreements. Organizations that have complex DAM requirements may require a specialist solution.

Opportunities

Many organizations are not using analytics to its full potential: With its strong analytics capabilities, Sitecore has an opportunity to extend its customer base. With automated testing and optimization features, visitors can receive the optimal experience. Sitecore Experience Platform recommends not only the best content but also the best segments to target, which goes further than the capabilities offered by most of its competitors.

Sitecore can increase its market share by targeting organizations that need to manage multiple sites: One of the strengths of Sitecore Experience Platform is its ability to centrally manage multiple sites, providing multilingual support. The Sitecore client is available in ten languages, but content can be managed in any language. Workflows help to manage the translation process. Managing multiple sites where content needs to be translated into multiple languages can be a headache for organizations, and Sitecore's capabilities in this area should help it to grow its market share.

Threats

Organizations that want a best-of-breed approach will not be attracted to Sitecore's portfolio of products: While many organizations will be attracted to the end-to-end capabilities of Sitecore, there

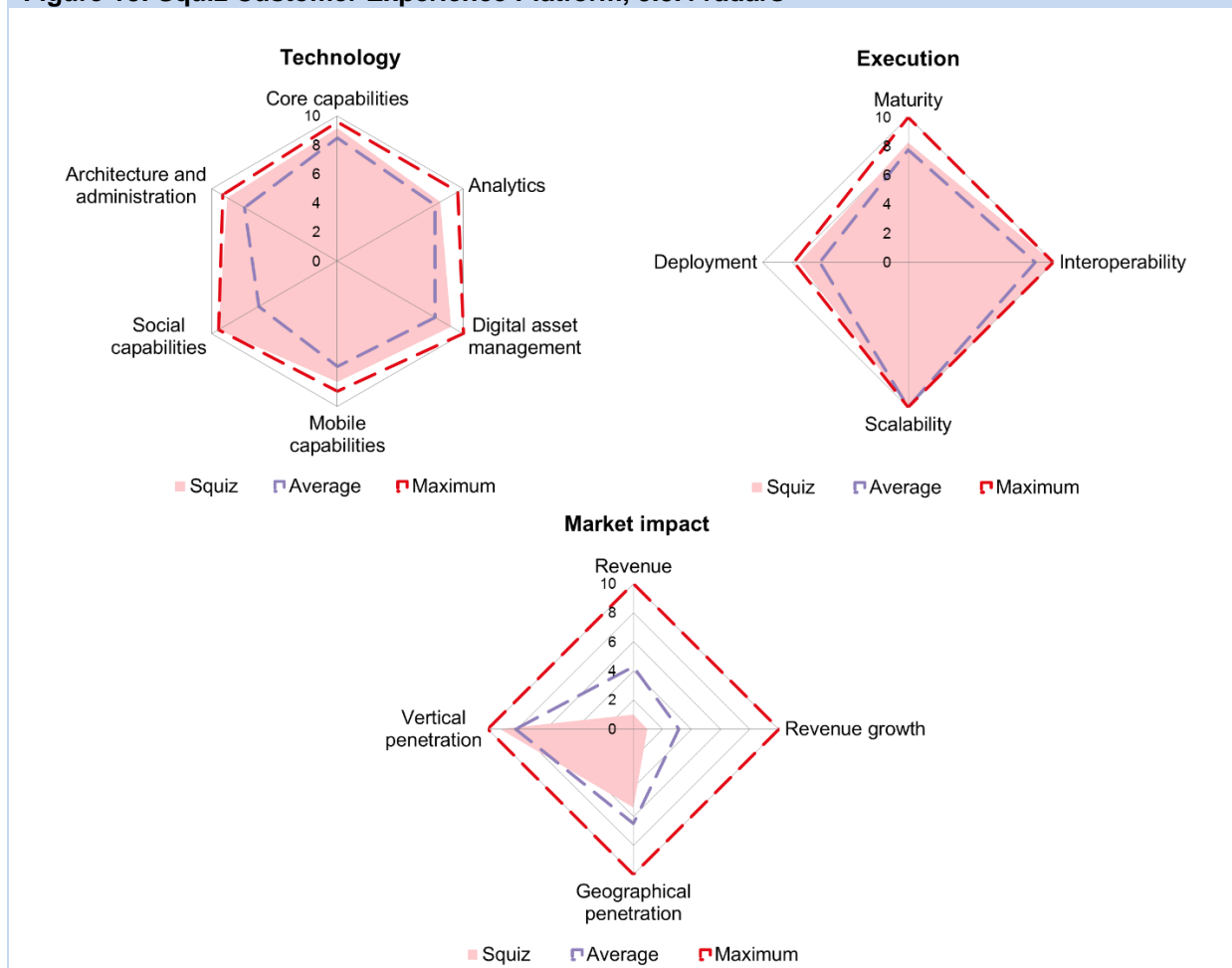
are some that prefer a best-of-breed approach. Some organizations will already have implemented e-commerce and marketing automation products and will require just a standalone WEM product.

Although Sitecore can be implemented this way, it will not be the first choice for many organizations

The WEM vendor landscape is crowded: There is a plethora of WEM vendors for organizations to choose from. These include large ECM vendors, specialist WEM vendors, and vendors that are expanding from e-commerce and marketing automation to providing some WEM capabilities. This can make it difficult for vendors to grow their market share.

Squiz Customer Experience Platform, 5.3.4 (Ovum recommendation: Leader)

Figure 18: Squiz Customer Experience Platform, 5.3.4 radars



Source: Ovum

Ovum SWOT assessment

Strengths

Squiz Digital Workspace provides an intranet for the millennial generation: Squiz Digital Workspace can be deployed on-premise or in the Squiz cloud. Secure integration with an organization's identity management system, document management system, HR database, staff directory, case management system, and instant messaging tools is provided out of the box. Fully

customizable design templates are also supplied. A responsive design allows organizations to adopt a mobile-first strategy.

Squiz Funnelback provides analytics and optimization capabilities: A number of tools are provided with Funnelback. Search Analytics provides an understanding of the content that visitors are clicking on, allowing organizations to view the effectiveness of their content. Accessibility Auditor ensures that content adheres to accessibility standards, highlighting URLs that are affected by conformity issues and suggesting how these can be corrected. Content Auditor allows websites to be tidied up by removing duplicate content so as not to deter visitors from using the sites. Funnelback's insights feature helps content creators to ensure that the content they produce can be understood by their target market by assessing content for the reading grade required to understand it. Funnelback's investment in pre-trained artificial intelligence (AI) will further augment analytics capabilities and deliver automated and proactive services specifically to support customer service managers, sales managers, knowledge workers, and marketers.

Personalized, targeted content can be easily created: Administration users are able to create personalization rules based on context, device, user attributes, role, or group. These rules are saved as templates, can be selected by business users via drop-down menus, and are applied to assets. Additionally, Funnelback can be set up to treat every click as a query, thus analyzing a user's behavior in context on the fly and retrieving information from any system across the organization. This results in high levels of personalization.

Weaknesses

There are currently few generic integrations: Squiz CXP has been designed as an open, integration-focused platform and ships with connectors to CRM, marketing automation, ECM, and document management tools. However, compared with some vendors, it has a limited number of connectors to third-party systems. More generic integrations are on Squiz's roadmap for future releases. With a growing customer base of high-volume transactional sites and digital service delivery, Squiz is planning integrations with leading product information management solutions and digital commerce platforms.

WEM implementations can be complex, thus requiring professional services: Because of the number of integrations that are typically required to back-end systems, as well as third-party e-commerce, marketing automation, and CRM products, WEM systems can be complex to implement. Therefore, they typically require professional services. Squiz is working hard to simplify the implementation process by tailoring its CXP offering for industry-specific needs and reducing the time to value for customers by targeting 90-day deployment cycles. Its PaaS offering also helps in this regard because organizations do not need to implement any hardware, although they may still need to customize the solution.

Opportunities

Squiz's partnership with Verint will deliver additional sales: Squiz and Verint have developed a digital-first government solution. It is pre-configured with a large number of government services, which means that authorities are able to set up the system quickly (in less than 90 days). It includes online forms, secure login facilities, self-service capabilities, CRM (from Verint), and Funnelback search. It can be implemented on-premise or in the cloud on a subscription basis. It includes a mapping system and localization services; therefore, users who log into the system can be delivered

personalized content. Eighty services have already been set up, including paying for government services, reporting animals in danger, and even requesting more complex services such as in-home assisted living. This provides Squiz with the opportunity to increase its sales to the government sector. There is also potential to extend the solution to the energy and utility sectors.

Squiz's PaaS solution provides an opportunity to target organizations that do not have the resources to implement on-premise systems: The Squiz cloud offers additional sales opportunities by providing organizations that struggle to implement on-premise solutions with the opportunity to deploy software normally associated with large vendors. Although Squiz Matrix, an open source system, can be downloaded for free, Ovum recommends that organizations take advantage of a licensed version that includes support, a library of pre-configured templates and functionality, and maintenance. Adopting a cloud version on a subscription basis makes this a more affordable option for small organizations.

Threats

Squiz competes against vendors that provide end-to-end WEM, marketing automation, and commerce solutions: Pure-play WEM vendors face competition from a few vendors that offer a full range of systems, including WEM and e-commerce. While many organizations are happy to adopt a best-of-breed approach and procure their requirements from a range of vendors, there are some that prefer a one-stop-shop approach and select a single vendor wherever possible.

The WEM vendor landscape is crowded: There is a plethora of WEM vendors for organizations to choose from. These include large ECM vendors, specialist WEM vendors, and vendors that are expanding from e-commerce and marketing automation to providing some WEM capabilities. This can make it difficult for vendors to grow their market share.

Appendix

Methodology

- Vendor events and analyst briefings.
- Vendor meetings and technology assessments.
- Interviews with end users.
- Discussions with service providers.

Further reading

Fundamentals of a Customer Experience Management Solution, IT0014-003087 (January 2016)

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