

Ovum Decision Matrix: Selecting a Web Experience Management Solution, 2018–19

Summary

Catalyst

The way in which individuals access information is changing. There are many more channels through which content can be delivered including wearables, virtual reality and augmented reality devices, and the IoT, which means that enterprises must be able to deliver content to all of these devices as well as marketing vehicles such as video screens and kiosks. At the same time, consumers (and employees) are demanding a much higher level of self-service, from researching products before they buy or reading technical documentation or customer reviews to solve problems rather than phoning the call center, to onboarding when signing up for a service, completing an application, or starting a new job. This means enterprises must produce much greater volumes of content in areas such as technical documentation and product manuals. Other areas that can help to promote brands are community sites where customers are encouraged to post articles and reviews about products, and ratings, which provide the self-service information demanded by customers. Enterprises can also provide online forms to speed up applications, reduce the number of paper documents, accelerate processing, and increase self-service. Ovum Decision Matrix: Selecting a Web Experience Management Solution, 2018–19 provides a comparative report of leading web experience management (WEM) solutions, enabling organizations to select the solution that best suits their requirements.

Ovum view

Deploying a mobile-first web content management (WCM) platform is no longer sufficient to enable enterprises to provide customers with engaging, highly personalized experiences. Enterprises should be implementing WEM solutions that provide support for new and emerging channels such as augmented and virtual reality, chatbots, and the internet of things (IoT). They should be looking at solutions that offer core platforms that are “headless” or de-coupled”. Not only does this allow content to be delivered to applications that push content out through these new channels, but it also provides maximum flexibility to enterprises that want to take a best-of-breed approach to WEM. All enterprises should now be on the road to digital transformation, and implementing a modern WEM platform with headless or de-coupled capabilities, analytics, digital asset management (DAM), online forms creation, and social capabilities, is an enabler of digital transformation.

Most WEM vendors have rearchitected their WCM platforms to offer headless and/or decoupled architectures. In the case of headless this means separating the content from the presentation, and allowing other applications to request content from the WCM using APIs. These applications can include websites, emails, SMS messages, video screens, augmented or virtual reality, or IoT devices. They can also include other WEM components such as analytics, social capabilities, and online forms, allowing enterprises to adopt a best-of-breed approach to WEM. A decoupled architecture works in the same way as headless, except the presentation is stored with the content, allowing enterprises to deliver experiences to other applications rather than just the content. However, most decoupled WEM solutions can also be deployed in a headless architecture. Cloud is also becoming more widely used as a deployment model, with some vendors claiming that most new customers are deploying WEM in the cloud, and many existing on-premises customers are also migrating to the cloud. Some WEM vendors offer software-as-a-service (SaaS), but an increasing number are providing platform-as-a-service (PaaS). When selecting a WEM solution ensure that it has a headless and /or decoupled architecture as well as good cloud capabilities. Machine learning and artificial intelligence (AI) are

both playing an increasingly important role across the WEM portfolio in areas such as DAM, where it is being used for auto tagging by analyzing content; in web analytics and recommendations engines for selecting highly personalized content to send to potential customers; and in chat bots to provide accurate responses to a wide range of questions.

The WEM market place is very mature, which means there is less differentiation between vendors than there was a few years ago. Areas of differentiation in the future will come from new and emerging technologies such as machine learning and AI, and how they are applied throughout the WEM technology stack. Another area of differentiation is how far individual vendors extend into marketing automation and e-commerce. Some offer no capabilities, but provide native connectors to leading products in these areas, while others offer lightweight capabilities that serve the requirements of enterprises that do not need complex capabilities in these areas. Vendors, such as IBM and Oracle have standalone marketing automation and e-commerce products in their portfolios, enabling enterprises to adopt a one-stop-shop approach to digital marketing. Adobe is aiming to join them as it was announced during the writing of this report that Adobe is to acquire Magento Commerce, a leading commerce platform provider, which will complement the marketing automation capabilities that Adobe already has.

Key findings

- WEM is now mature technology area that is on the cusp of more disruption.
- WEM vendors are investing in areas such as e-commerce and marketing automation in an attempt to provide end-to-end marketing solutions.
- Many new channels have emerged over the past couple of years that WEM vendors must support, such as augmented and virtual reality, IoT, wearables, and voice-enabled devices.
- Vendors must future proof their portfolios in order to support new channels as they are developed.
- WEM vendors have gone headless by rearchitecting their products to separate content from the presentation, allowing content to be requested by third-party applications.
- Headless architectures make it much easier to implement best-of-breed WEM solutions, rather than buying a complete solution from a single vendor – which also eliminates the need for rip and replace.
- Integration is key to WEM in 2018, with APIs provided to integrate the content in the WCM repository with third-party applications, allowing enterprise-controlled content to be reused by third-parties such as digital agencies.
- Most WEM vendors now provide cloud deployment options, which reflects an increase in demand for cloud solutions.
- AI is being implemented across WEM from auto tagging in DAM systems to analytics and recommendations engines to help target individuals with highly relevant content.
- Nine of the 12 vendors assessed in the WEM Ovum Decision Matrix are in the Leader's category, with the other three not far behind in the Challenger's category, which reflects the mature nature of WEM.

Vendor solution selection

Inclusion criteria

There are a large number of vendors that offer WEM, 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, 2018–19, a vendor solution needed to meet the following criteria:

- Each system had to be capable of being deployed standalone and not be dependent on any other components of an enterprise content management (ECM) platform.
- The system had to include a fully-featured core WCM platform and repository.
- Content and display templates needed to be created and stored separately.
- The product had to either include analytics or integrate with leading third-party analytics systems.
- DAM capabilities should be included.
- It included social capabilities.
- Extensive mobile support was provided along with responsive design.
- Integration with market automation, e-commerce, and CRM systems was necessary to support the end-to-end customer journey.
- The products needed a significant level of recognition among enterprises, cover a range of verticals, and have 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, 2018–19, 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/service 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.
- **Online forms:** The functionality required to create and manage forms that can be used across WEM from applications to forms for onboarding.
- **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.
- **Cloud capabilities:** The product-set has been rearchitected to run in a cloud environment. This may be running in the WEM vendor's own data center or in a public cloud, and may be SaaS or PaaS.
- **Integration capabilities:** This is the ease with which the WEM platform can be integrated with third-party applications either using native connectors or APIs.
- **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:** The stage that the product/service is currently at in the maturity lifecycle is assessed here, relating 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.
- **Deployment:** Referring to a combination of assessed criteria and points of information, Ovum analysts provide detail on various deployment issues, including time, industries, services, and support.
- **Scalability:** Points of information are provided to show the scalability of the solution across different scenarios.
- **Innovation:** Innovation can be a key differentiator in the value that an enterprise achieves from a software or services implementation, and this is assessed in this criteria.
- **Enterprise fit:** The alignment of the solution is assessed in this dimension, and the potential ROI period identified.

Market impact

The global market impact of a solution is assessed in this dimension. Market Impact is measured across five 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 revenue growth estimate for the next 12 months is calculated as a percentage of the growth rate of the fastest-growing solution in the market. The percentage is then multiplied by 10 and rounded to the nearest integer. In addition, 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. The two values are then combined.
- **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 selling and marketing the product well. The products offer competitive functionality and good price-performance proposition, and should be considered as part of the technology selection.
- **Niche vendor:** 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 web experience management Ovum Decision Matrix Interactive, an online interactive tool providing you with the technology features that Ovum believes are crucial differentiators for leading solutions in this area, please see the Ovum Decision Matrix Interactive tool on the Ovum Knowledge Center.

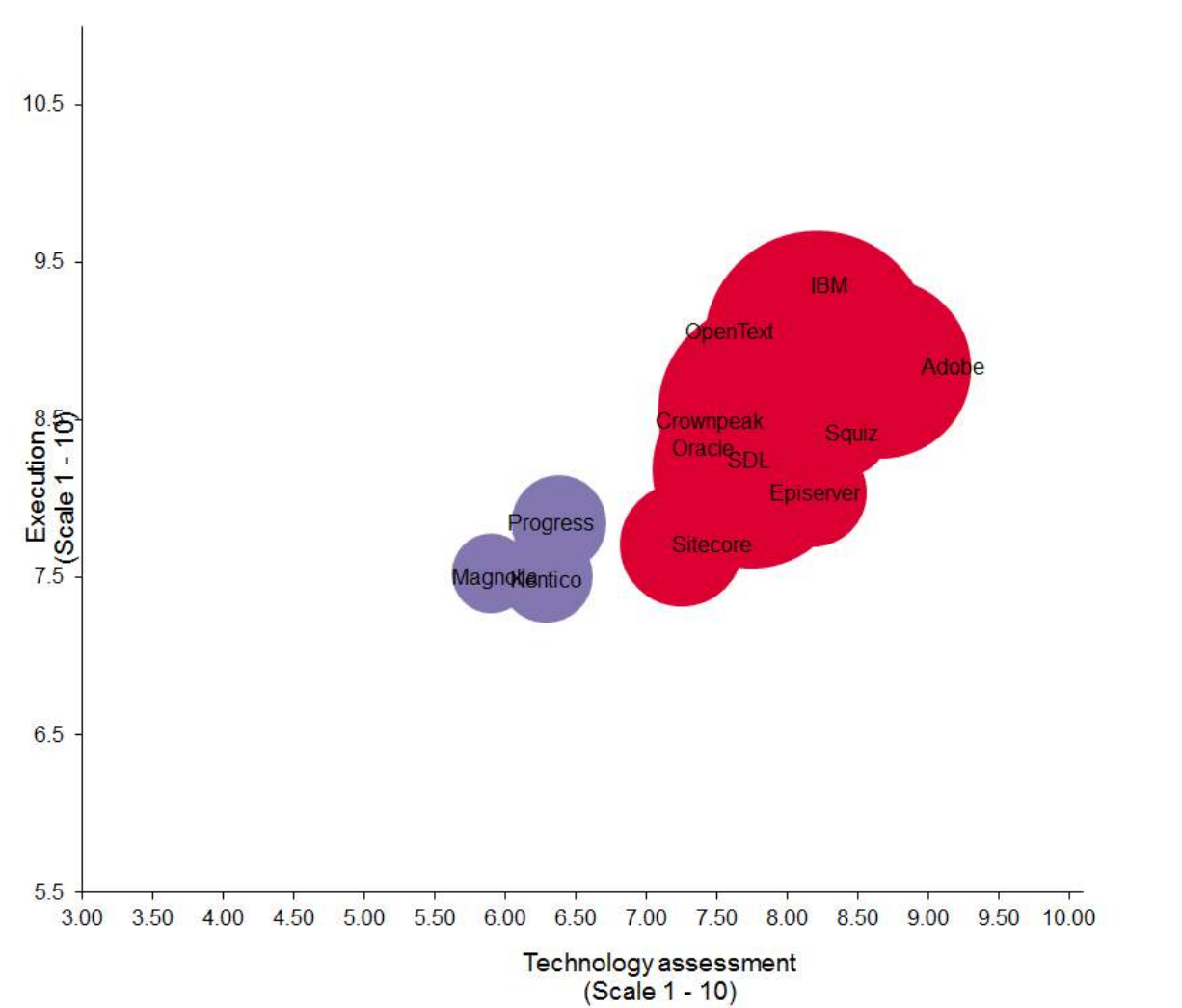
Market and solution analysis

Ovum Decision Matrix: web experience management, 2018–19

The WEM space is very mature with very little to choose between vendors in terms of core capabilities, which is reflected in the results of the Ovum Decision Matrix, where there are nine Leaders, with three Challengers who are not far behind. Despite a great deal of consolidation in this area over the past few years, there are still a large number of vendors, with many of them

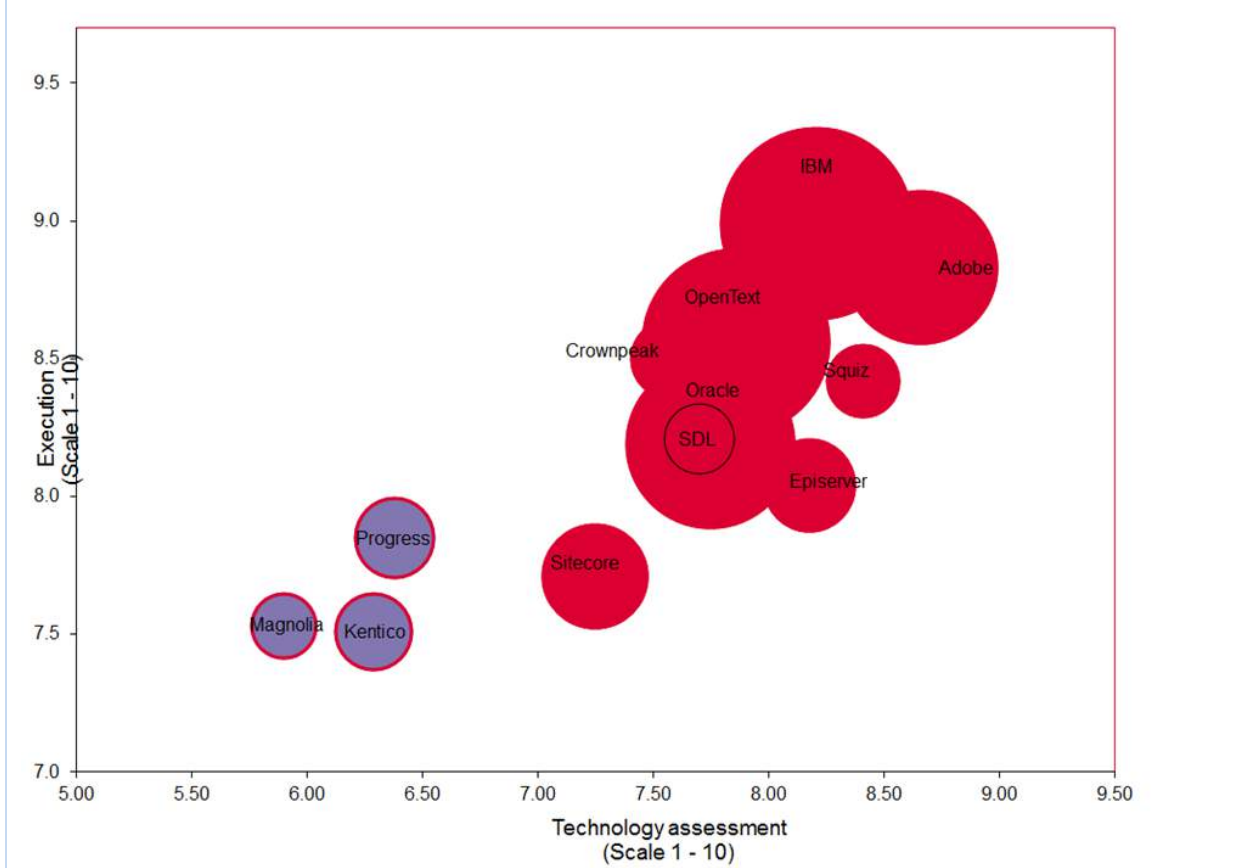
independent specialist vendors. Most WEM vendors offer a choice of cloud or on-premises solutions, although Crownpeak is a cloud-only vendor, and other vendors are finding that most new implementations are for cloud options rather than on-premises, which is resulting in vendors focusing more attention on their cloud services. Ovum believes that more vendors will offer cloud-only solutions within the next few years. Cloud capabilities are therefore an important element of this Ovum Decision Matrix. Integration has become a key component of a WEM platform, particularly as vendors have moved to headless architectures. However, integration with other products that make up a marketing solution are important including marketing automation, e-commerce, and customer relationship management (CRM) systems as well as backend enterprise resource planning (ERP) applications. It is often the smaller specialist vendors that have the best integration capabilities, as larger vendors often offer end-to-end solutions that include marketing automation and e-commerce products. However, some specialist vendors are also developing capabilities in marketing automation and e-commerce areas.

Figure 1: Ovum Decision Matrix: web experience management, 2018–19



Source: Ovum

Figure 2: Expanded view of Ovum Decision Matrix: web experience management, 2018–19



Source: Ovum

Table 1: Ovum Decision Matrix: web experience management, 2018–19

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

Source: Ovum

Market leaders: Adobe Experience Manager, Crownpeak Digital Experience Management, Episerver Digital Experience Cloud, IBM Digital Experience Manager, OpenText TeamSite, Oracle Content and Experience, SDL Tridion DX, Sitecore Experience Platform, Squiz Customer Experience Platform

Adobe Experience Manager (AEM) is a WEM platform that allows marketers and IT to design and deliver experiences across multiple channels, including web, mobile, in store, digital signage, and any endpoint in the customer journey. Adobe has an above average score in all but one technology area, reflecting its position as a well-rounded and functionally-rich WEM solution.

Crownpeak offers a comprehensive WEM solution, Digital Experience Management (DXM), which is available solely as a cloud service delivered on Amazon Web Services (AWS). It includes content and asset management, personalization and testing, search, social media, integrations with legacy systems and third-party applications, data quality management, and digital governance with consent and monitoring tools. Crownpeak was a Challenger in the previous WEM Ovum Decision Matrix, and its promotion to a leader demonstrates that cloud-based products delivered as a service are as feature rich as on-premises solutions.

Episerver Digital Experience Cloud uses an increasingly microservices-based architecture in support of coupled, decoupled, and hybrid scenarios to help its customers deliver engaging, targeted experiences in support of the customer journey. It combines content, commerce, multichannel marketing, and predictive analytics in a single platform. Episerver has moved up from the Challenger category in the last WEM Ovum Decision Matrix, reflecting additional capabilities that have been added to the product.

IBM offers two solutions for WEM: IBM Digital Experience Manager, an on-premises solution, and IBM Digital Experience on Cloud, which is an IBM Hosted DX Platform to build content sites. In addition, IBM Watson Content Hub, a SaaS solution, provides a content and asset management service with embedded Watson access for artificial intelligence. IBM is strong across all technology areas with above average scores in most categories.

OpenText TeamSite provides a comprehensive web content management (WCM) platform, which is supported by DAM, business intelligence and analytics, intelligent forms automation, marketing optimization, workforce optimization, voice of the customer, and customer communications management. Together, these create a comprehensive WEM solution that can be implemented on-premises or in the cloud. It is particularly strong in DAM capabilities where it supports speech recognition and converts speech to text, which are features not yet supported by most other vendors.

Oracle has re-architected its experience portfolio to be headless, which allows its content to be accessed by its extensive portfolio as well as by third-party products. It provides an on-premises solution, Oracle Content and Experience and a cloud option Oracle Content and Experience Cloud, to address the requirements of increasing numbers of customers that are adopting cloud solutions. Oracle is particularly strong in its analytics capabilities, although it scores above average in most categories.

SDL Tridion DX is SDL's WEM solution, which manages content across the full customer lifecycle. It includes SDL Tridion Sites for WCM and SDL Tridion Docs for structured content management. Marketing content, commerce content, and in-depth product information are brought together through a shared delivery tier to provide a unified digital experience. It has strong capabilities in core features

and DAM. It also has the advantage of having translation services, which makes it attractive to enterprises with websites that require translation into multiple languages.

Sitecore Experience Platform (XP) is a fully connected customer experience platform that combines WCM, personalization, application integration, marketing automation, email marketing, social media, commerce, optimization, and analytics. It provides on-premises and cloud options. Sitecore is especially strong in core features, analytics, and mobile capabilities.

Squiz Customer Experience Platform (Squiz CXP) comprises Squiz Matrix and Funnelback as well as Squiz Cloud, which provides the option to deploy the solution on the customer's infrastructure or in a third-party cloud. Its portfolio provides the features required to help enterprises accelerate their digital transformation processes and reach their desired outcomes more quickly. Squiz has strong capabilities in most technology categories and it has always competed effectively against much larger vendors.

Market challengers: Kentico EMS and Kentico Cloud, Magnolia, Progress Sitefinity

Kentico EMS combines content, commerce, and digital marketing capabilities. Kentico Cloud is a headless CMS that provides content management and personalization for enterprises wanting to adopt the SaaS model. Kentico has moved from being a "niche vendor" in the last Ovum Decision Matrix to being a Challenger in this one, and the vendor is particularly strong in core features and analytics.

Magnolia is an open source WEM vendor with a solution that helps organizations ingest content, use the content to build digital experiences, and publish and track the content through multiple digital touchpoints. It can be deployed on-premises or in the cloud. It has been designed for developers to package and deploy a site's configuration, which provides an advantage over its competitors who are now adding features to support developers. It has good DAM and online forms capabilities. Magnolia has also moved from being a niche vendor to a Challenger in this Ovum Decision Matrix.

Progress Sitefinity is a WEM system that enables adaptive user experiences, AI and predictive capabilities, and the ability to connect to all systems, and provides internet scalability. It can be deployed on-premises or in the cloud. This is the first WEM Ovum Decision Matrix that Progress has participated in. Progress is especially suited for organizations that need to deliver multichannel experiences with strong support for headless and support for mobile, chat, and other channels. It has extensive core features, and has good capabilities in other areas.

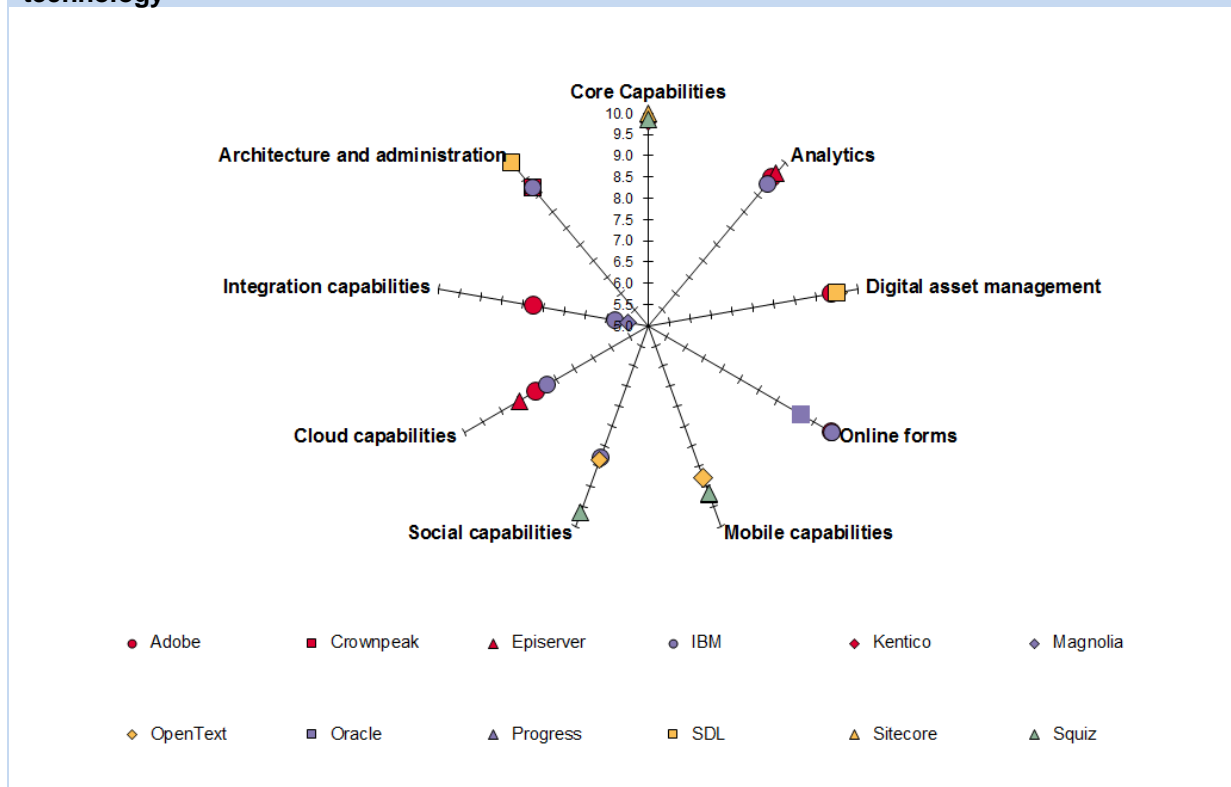
Niche vendors

No vendor solutions fall into this category

Market leaders

Market leaders: technology

Figure 3: Ovum Decision Matrix: web experience management, 2018–19 – Market leaders – technology

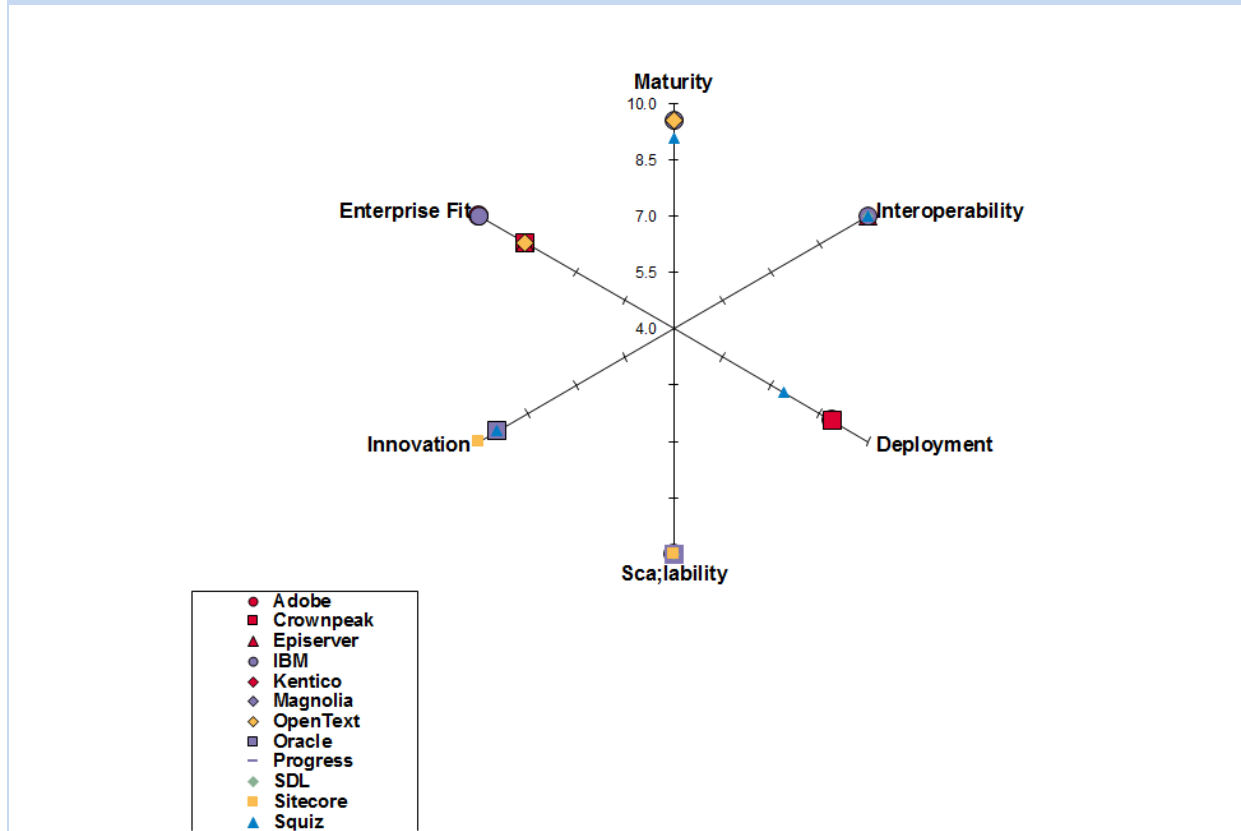


Source: Ovum

Most of the vendors are leaders in one or more technology areas. All vendors have high scores in core features with Kentico, Sitecore, and Squiz leading the way. When it comes to analytics Adobe, Episerver, and IBM come out on top. Not all vendors have their own in-house developed analytics and either embed third-party analytics in their solutions, or integrate with third-party solutions such as Google Analytics. In DAM, Adobe, OpenText and SDL are the leaders. It is interesting to note that OpenText also provides DAM as a standalone product. Some vendors provide lightweight DAM features, which are sufficient for enterprises with medium quantities of assets, but for enterprises with large volumes of assets or multiple brands to maintain a specialist solution is required. All vendors provide online forms capabilities with some also offered as standalone products, but here Adobe, IBM, and Oracle lead the way. Enterprises should ensure that any WEM solution being considered provides the ability to create forms. OpenText, Sitecore, and Squiz provide the most mobile features, while IBM, OpenText, and Squiz have the strongest social capabilities. However, social is an area where some vendors are weak. While they provide integration with social network sites, they do not support enterprise social networks, which many enterprises deploy internally. Adobe, Episerver, and IBM lead the way in cloud capabilities, but this is an area where all vendors have strong cloud offerings. When it comes to integration Adobe, IBM, and Magnolia are the leaders, but all vendors provide APIs to allow integrations to be built to third-party applications.

Market leaders: execution

Figure 4: Ovum Decision Matrix: web experience management, 2018–19 – Market leaders – execution

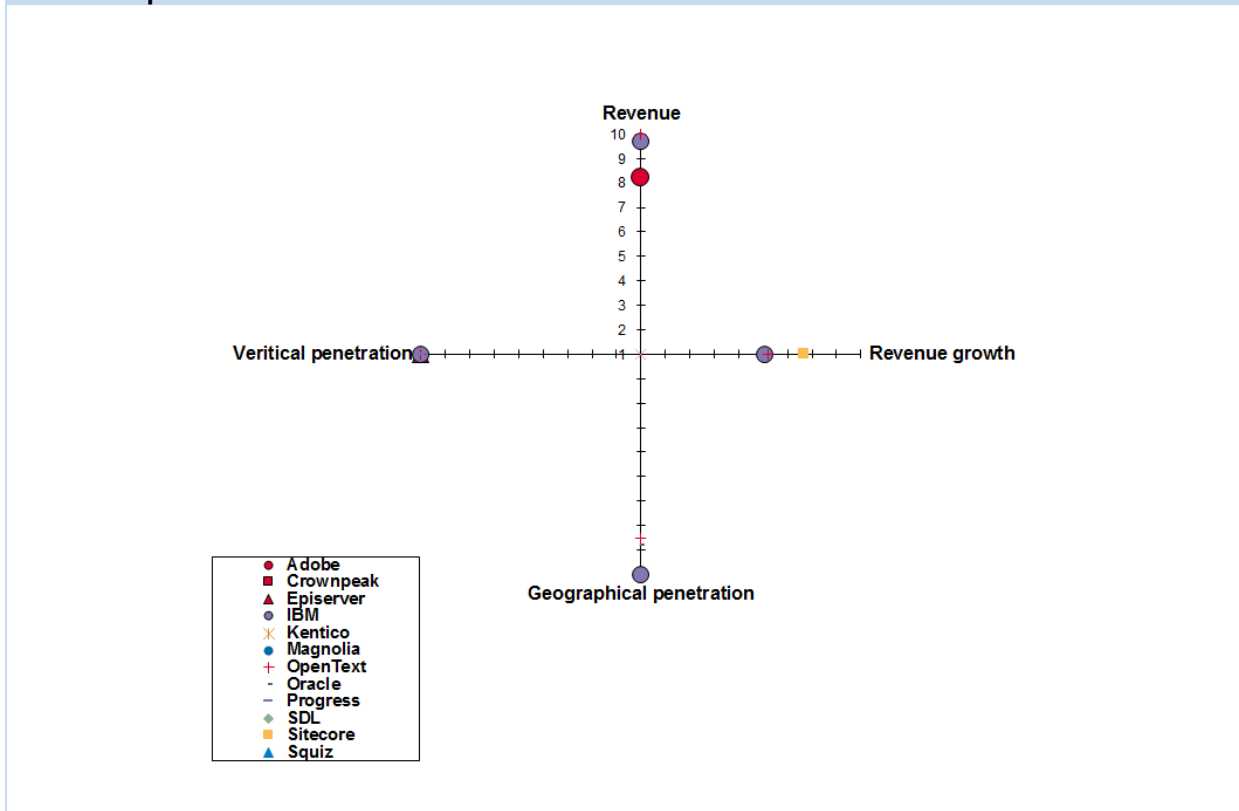


Source: Ovum

The maturity category includes the length of time that the vendor's cloud offering has been available as well as the on-premises software. While all vendors (except the cloud-only Crownpeak) have well-established on-premises solutions, several are relatively new to the cloud market, and this has marked them down in this category, with the leaders being IBM, OpenText, and Squiz. Several vendors score full points for interoperability, which covers areas such as out-of-the-box integrations. Top scorers are: Episerver, IBM, Progress, SDL, and Squiz. The deployment category includes solution-specific templates for a number of listed vertical industries, and it is here that most vendors lost marks, with Adobe, Crownpeak and Squiz leading the way. More than half of vendors scored full marks in the area of scalability, with marks lost on the size of deployments. Some products are targeted at the enterprise market and the vendors therefore do not have very small deployments. In innovation, Magnolia, Oracle, Sitecore, and Squiz came out on top. Finally, in enterprise fit, which includes the time to ROI, Adobe, Crownpeak, Episerver, IBM, and OpenText were the leaders, although all solutions were well aligned with mainstream IT architectures and roadmaps.

Market leaders: market impact

Figure 5: Ovum Decision Matrix: web experience management, 2018–19 – Market leaders – market impact



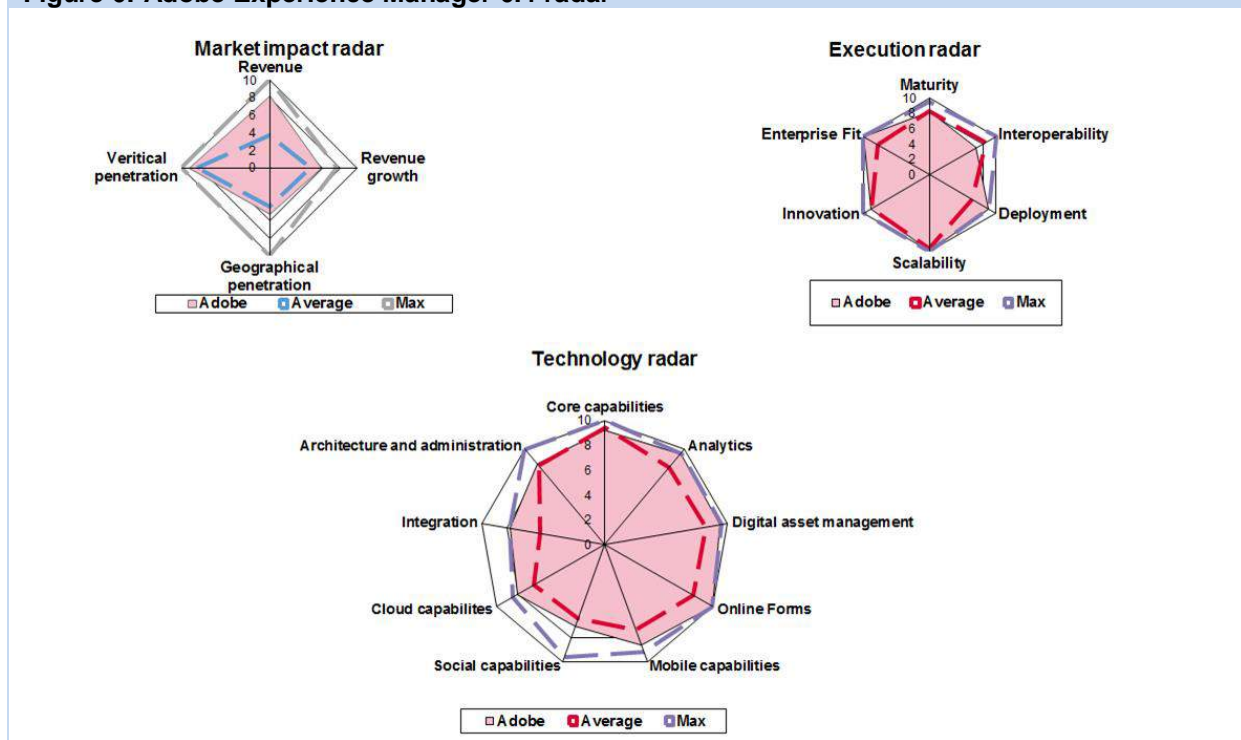
Source: Ovum

In terms of revenue, it is no surprise that Adobe, IBM, and OpenText have the largest revenues closely followed by Oracle. In terms of revenue growth IBM, OpenText and Sitecore come out on top. In geographical penetration, which examines the geographical presence of vendors, it is again the large vendors that have the advantage with IBM, OpenText, and Oracle the leaders, although the smaller vendors have large networks of partners that deliver their solutions, particularly in areas where they do not have a direct presence, allowing them to reach a global marketplace. In vertical penetration, there are several vendors that score full marks, but again most vendors are able to deliver their solutions to all vertical industries, either through their own developed vertical solutions or from solutions developed by partners with expertise in particular industries.

Vendor analysis

Adobe Experience Manager 6.4 (Ovum recommendation: Leader)

Figure 6: Adobe Experience Manager 6.4 radar



Source: Ovum

Ovum SWOT assessment

Strengths

Adobe Sensei provides machine learning and AI

Adobe Sensei uses Adobe's AI and machine learning framework, which can be accessed and applied across AEM to help drive opportunities and deliver the most relevant experiences. It learns what different types of customers want, identifies significant events, and makes recommendations to help marketers drastically lower time to create and manage experiences and ensure that customers get the right content, at the right time, on the appropriate device. Adobe Sensei also helps marketers efficiently manage and search vast repositories of assets by using Smart Tags – auto-generated metadata tags that are applied to assets. Smart Tags can be trained to identify brand-centric objects and customize keywords for metadata tags. Smart Crop automates the process of resizing assets for different screen sizes, without losing the focus on the object within the asset, for example, by removing backgrounds from images rendered on mobile devices. Smart Layout recommends personalized layout for each audience segment that optimizes the content for each segment.

Adobe Analytics provides insights to help personalize content

Adobe Analytics is a leading analytics solution that is often deployed as a standalone product by enterprises using third-party WEM. It provides a wide range of insights, including metrics on how users navigate through a website, showing which pages are popular and which are not; it analyzes

individual user journeys, allowing enterprises to build profiles of individual users as well as segments, providing marketers with the insights required to create marketing campaigns; and it records customers' digital interactions in the context of their location to better deliver localized content.

AEM Forms helps make processes paperless

AEM Forms is a forms creation and customer communication application that is mobile optimized and can be applied in a large number of scenarios, including digital enrollment, onboarding, and ongoing communications. In addition to reducing the amount of paper that needs to be processed, it also speeds up processing through the ability to introduce automation.

Single Page Applications (SPA) allow marketers to quickly build webpages

The SPA Editor allows SPAs to be built on the framework of choice. Marketing and developer authors are able to collaborate and edit content seamlessly, regardless of the authoring framework used. Progressive web app entry is supported, allowing native mobile app accessibility.

Weaknesses

Adobe Experience Manager is perceived as being complex to implement

While AEM provides many of the necessary capabilities for digital experience delivery, it may be regarded as too large and complex for some organizations looking for a templated solution. Although Adobe has done a lot of work to make its solutions easier and quicker to implement, a perception persists that a lot of professional services may still be required, including the need to add integrations to external systems and create customizations. Because of this perception, smaller companies may shy away from considering Adobe. However, with its cloud options and core components, Adobe has simplified the implementation processes and with no infrastructure dependency. The headless and decoupled architecture options simplify the implementation, as enterprises can implement the core components and integrate with third-party applications to create a best-of-breed solution.

Opportunities

A demand for more intelligence in WEM solutions is providing new opportunities

Enterprises are demanding WEM solutions that help them make decisions based on real-time data and knowledge of customers. With its AI and machine learning capabilities, Adobe is well positioned to help enterprises to predict visitor behavior and therefore provide the optimum content to provide highly personalized and targeted content, delivered through the appropriate channel. Some of the features proved by Adobe AEM are content ideation and search, content creation, content management, content personalization, content delivery, and content performance. Intelligent systems can democratize high-value enterprise capabilities and help pave a path into midmarket and smaller organizations.

Decoupled and headless architectures provide flexibility and help future-proof enterprises' investments

Employees are expected to achieve more with fewer resources, and this is true with WEM, as marketers need to be able to deliver content through current and future channels. They also require greater interoperability with third-party applications as they strive to deliver ever more engaging experiences. In addition, they need to develop new sites in the shortest possible time and have the ability to expand and scale with minimal additional costs. With headless and decoupled architectures and best practices to get enterprises up and running, Adobe is well positioned to increase sales of AEM.

Threats

The WEM market is crowded with vendors

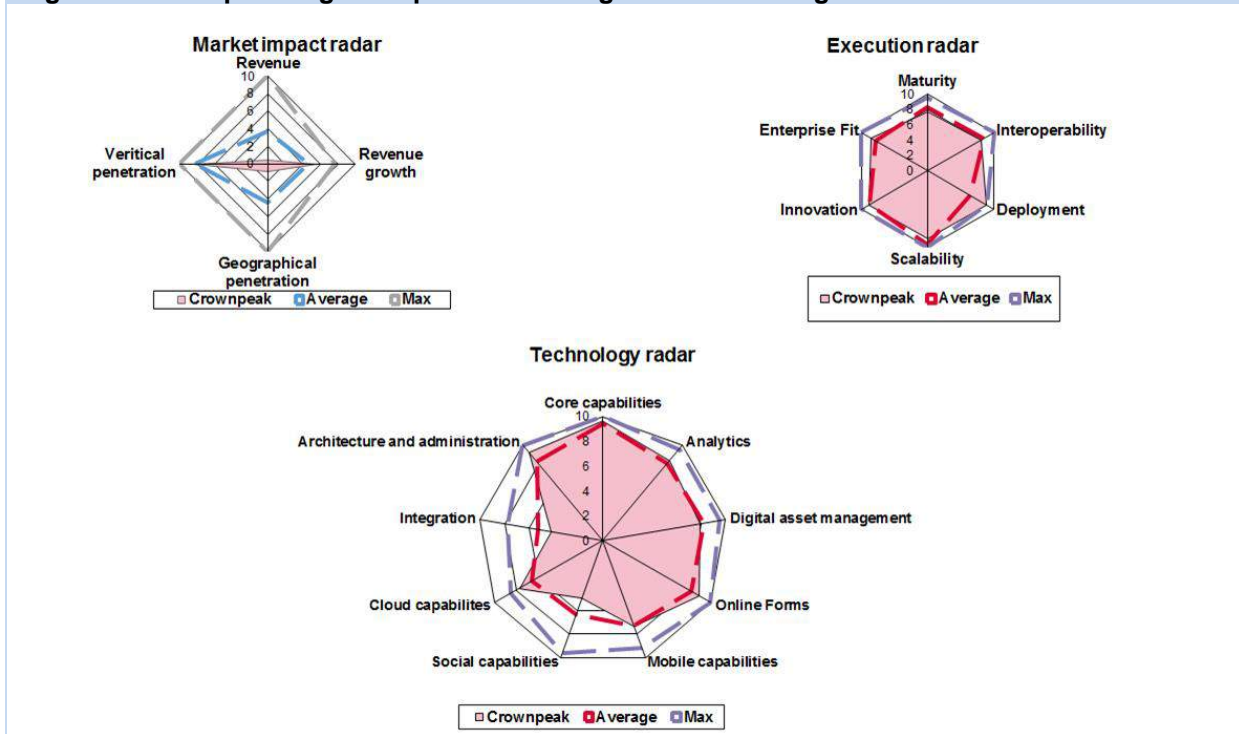
There are a large number of competitors in the WEM space, including enterprise content management vendors that attempt to provide end-to-end content management capabilities such as WEM, as well as specialist WEM vendors. A number of vendors, including Adobe, are attempting to provide end-to-end digital experience management solutions by combining marketing automation, e-commerce, and WEM capabilities. Adobe was one of the first vendors to combine marketing automation and WEM. In June 2018, Adobe completed its acquisition of Magento Commerce, adding e-commerce capabilities.

Enterprises need to update their web content management (WCM) platforms

A large number of organizations are still using dated WCM platforms. They may believe that a responsive mobile-first environment is sufficient and therefore be reluctant to move to the latest WEM platform. WEM vendors such as Adobe need to communicate the message that a modern WEM platform with a headless or decoupled architecture is required to support new and emerging customer touchpoints.

Crownpeak Digital Experience Management (Ovum recommendation: Leader)

Figure 7: Crownpeak Digital Experience Management radar diagrams



Source: Ovum

Ovum SWOT Assessment

Strengths

Extensive authoring and experience management capabilities provided

The core content management system has been designed to allow nontechnical users to create, preview, and manage digital experiences across a wide range of channels, including websites, mobile applications, and portals driven by back-end systems. Content can be edited inline, forms can be created, templates and reusable components are provided using a drag-and-drop interface, testing and targeting rules can be built from the page editor, and content can be published directly to social media platforms. Content localization and translation tools are just some of the many features.

A number of features help marketers target content

Web Content Optimizer allows business users to create and configure data-driven, contextualized, dynamic customer experiences with little or no coding required. Simple business rules and complex data-driven criteria are supported, and A/B and multivariate testing are available directly from the page editor. Users can be targeted using ambient, behavioral, form, or third-party data, and integrated forms can be built using a drag-and-drop interface.

Using APIs, Crownpeak DXM can integrate with best-of-breed applications

Crownpeak's integration capabilities allow for dynamic connections with best-of-breed applications and key customer data sources. Any data source can be used to personalize and target offers across digital customer touchpoints. Connectors and integrations are available for more than 50 applications, such as MAP, CRM, ERP, and analytics. Back-office systems are supported with a REST-based, bidirectional, 25-method API. In addition, custom interactive dashboards can be built for integrated applications.

Site search includes advanced features to ensure that content can be found as soon as it is published

Crownpeak search provides a highly scalable, high-performance indexing and query platform. Real-time indexing of any website or document collection, regardless of whether it is managed by Crownpeak, ensures document availability as soon as content is published. Content suggestions are made based on defined user behavior criteria, and Auto Language Recognition supports single-, double-, or multibyte (UTF-8) character sets. Faceted search, type-ahead search, tag cloud, search, and synonym search for commonly misspelled words are available. Crawling parameters and search results can be customized for different user experiences and privacy scenarios.

Weaknesses

Crownpeak DXM cannot crawl social network sites for brand mentions

Although some social network capabilities are provided, third-party products are required to crawl social network sites for brand mentions. As it is imperative that enterprises quickly detect and react to brand mentions, particularly those containing negative sentiment, the ability to monitor social network content is important. However, Crownpeak's open architecture makes it easy to integrate with third-party products.

Opportunities

Crownpeak can benefit from the growing interest in cloud solutions

Crownpeak offers a highly available cloud platform built on AWS, which provides scale, performance, and reliability, enabling the vendor to take advantage of the growing demand for cloud-based managed services. As a cloud-only solution, Crownpeak DXM is optimized for cloud, and it offers customers fast deployment times and easy integration with back-end and other third-party systems.

Crownpeak Digital Quality Management (DQM) and Digital Governance provide security, compliance, and control capabilities

DQM provides features that many of Crownpeak's competitors do not. It is especially valuable in helping enterprises with comprehensive assessment and reporting on compliance with SEO best practices, accessibility standards, regulations, and customer-defined branding standards. Additionally, Crownpeak Digital Governance helps organizations comply with GDPR as it provides visibility across all digital touchpoints and monitors and achieves compliance with the personal data collection consent requirements across multiple jurisdictions. Its tools survey and report on third-party technologies operating across the organization, which will appeal to enterprises struggling to comply with GDPR.

Threats

The WEM market is crowded with vendors

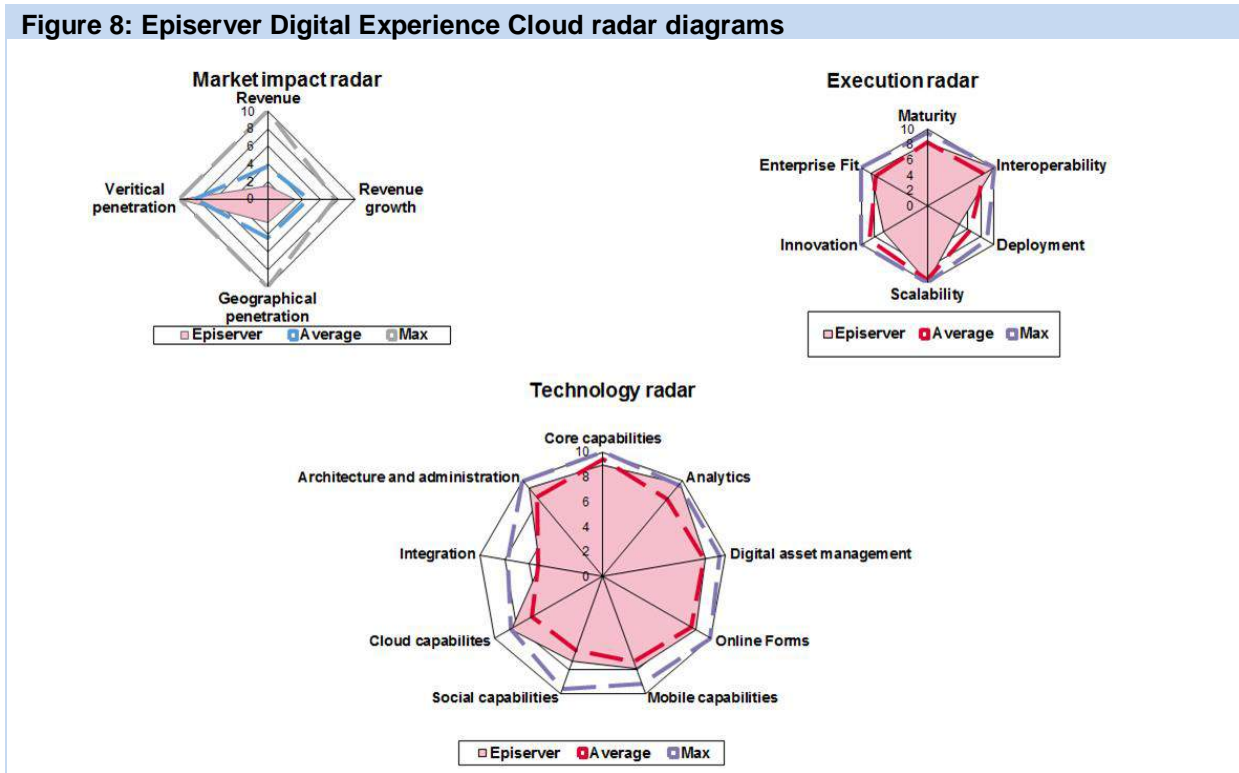
There are a large number of competitors in the WEM space, including enterprise content management vendors that attempt to provide end-to-end content management capabilities such as WEM and specialist WEM vendors such as Crownpeak. A number of vendors also are attempting to provide end-to-end digital experience management solutions by combining marketing automation, e-commerce, and WEM capabilities. However, with Crownpeak's flexible approach in supporting both decoupled and headless architectures and its integration capabilities, enterprises can easily integrate their preferred marketing automation and e-commerce products to create a best-of-breed approach to digital marketing.

Not all enterprises are upgrading their WEM solutions to modern platforms

WEM is an important element of digital transformation, but not all enterprises are upgrading to the latest platforms. Some believe that a mobile-first platform is sufficient and thus fail to benefit from new decoupled and headless architectures that can enable them to support new channels and technologies as they emerge. Vendors such as Crownpeak need to communicate the message that new decoupled and headless architectures are required for digital transformation, and that with SaaS platforms such as Crownpeak's, customers do not have to worry about upgrades.

Episerver Digital Experience Cloud (Ovum recommendation: Leader)

Figure 8: Episerver Digital Experience Cloud radar diagrams



Source: Ovum

Ovum SWOT Assessment

Strengths

Prepackaged solutions help organizations address specific requirements

Episerver's prepackaged solutions take the complexity out of selecting what capabilities are required to address specific scenarios. Experience-Driven Commerce provides retailers, brands, manufacturers, and wholesale distributors with the necessary tools to deliver personalized experiences to online shoppers through their preferred channels. The Individualized Content solution combines artificial intelligence (AI), assisted segmentation, and contextual data to personalize and sequence rich content experiences. Intelligent Campaigns helps users create, automate, and understand the performance of omnichannel campaigns across web, mobile, email, text, social, and the IoT by combining AI and customer data to personalize experiences based on real-time behavior.

Episerver Digital Experience Cloud includes extensive search capabilities

Episerver Find is a multilingual enterprise search solution that allows users to search across all elements of their websites, including documents, PDFs, and other subsidiary websites. It can also dynamically build landing pages based on user search terms. Episerver Personalized Find is an add-on solution that personalizes rankings in search results. Using AI to analyze a customer's history, real-time web browsing, and email behavior, it presents contextually relevant products.

Extensive personalization and recommendation capabilities are provided

Episerver has a number of modules that provide personalization features. Episerver Perform uses AI to personalize website product recommendations by analyzing every visitor, visitors' individual

customer journeys, and the actions of similar customers. It then presents real-time recommendations based on the data and marketing strategies. Episerver Advance uses AI to personalize content and content recommendations across a company's digital channels. Content is selected based on the visitor's profile, interests, and real-time behavior as well as the popularity of content. Episerver Reach ensures that emails are personalized for each recipient. It can also send personalized emails that are triggered by real-time behavior, such as abandoned baskets or browsed products.

Multichannel campaign management is included in the solution

Episerver Campaign comprises a suite of intelligent marketing products to help business users create, manage, orchestrate, personalize, and execute campaigns across all their channels using AI and customer data to personalize communications, based on real-time behavior across email, social, web, print, SMS, and push notifications.

Weaknesses

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 networking sites to help build profiles as standard, although its CDP can be enriched with social data via configuration.

Opportunities

Episerver can benefit from the growing interest in cloud

Episerver's ISO 27001-backed and Microsoft Azure-based cloud service allows organizations to easily expand their WEM deployment, adding new capabilities as required, rather than having to pay up front for capabilities that they will not require immediately. Cloud deployments in WEM are growing rapidly, and Episerver should be able to benefit from this, especially as it is able to guarantee data sovereignty for Europe, North America, and Asia-Pacific. In addition, it is providing features that help organizations comply with the General Data Protection Regulation in the EU.

Consumers are expecting personalized content much earlier in their relationship with a brand

The ability to personalize content is becoming a much more important requirement for organizations. Episerver is investing in products and applications to enable AI-driven personalization to improve customer experiences. In addition, its extensive analytics capabilities, including A/B testing, will provide additional opportunities to further expand its rapidly growing customer base.

Threats

The WEM market is crowded with vendors

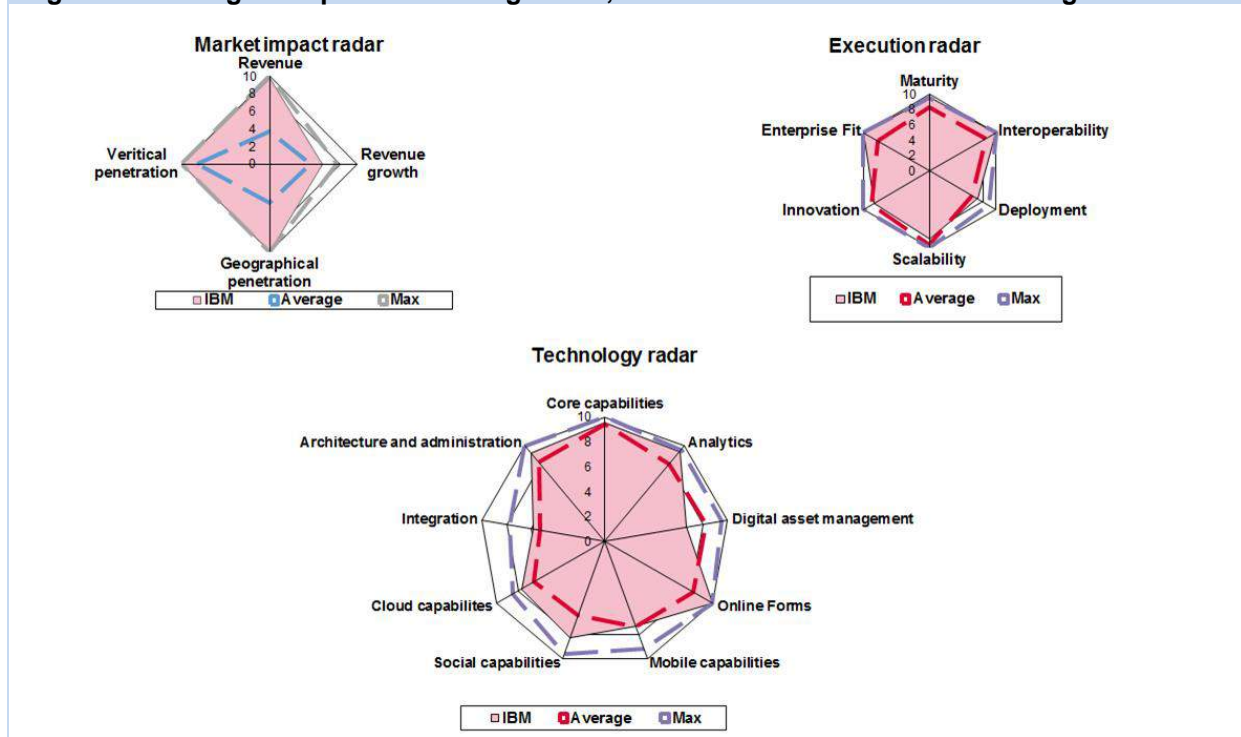
There are a large number of competitors in the WEM space, including enterprise content management vendors that attempt to provide end-to-end content management capabilities such as WEM, as well as specialist WEM vendors. A number of vendors, including Episerver, are also attempting to provide end-to-end digital experience management solutions by combining marketing automation, e-commerce, and WEM capabilities. However, Episerver's focus on midmarket organizations and divisions and subsidiaries of enterprises is a different approach than many of these competitors that are targeting large enterprises.

Enterprises need to update their web content management platforms

A large number of organizations are still using dated WCM platforms. They may believe that a responsive mobile-first environment is sufficient and therefore be reluctant to move to the latest WEM platform. WEM vendors such as Episerver need to communicate the importance of a modern WEM platform that includes a headless architecture to support new and emerging customer touchpoints.

IBM Digital Experience Manager v9.0, IBM Watson Content Hub (Ovum recommendation: Leader)

Figure 9: IBM Digital Experience Manager v9.0, IBM Watson Content Hub radar diagrams



Source: Ovum

Ovum SWOT Assessment

Strengths

Digital Experience Manager includes traditional WCM capabilities

IBM Digital Experience Manager includes features that are expected in a traditional WCM solution, including the ability to define content types, create and edit content, lay out pages, define a site structure, apply styles and themes, define workflow for approvals, edit content inline, enforce publishing rules, define multilingual content and sites, and personalize sites. Integration is provided for IBM Watson services, such as IBM Watson Tone Analysis. DXM authors can apply inline, real-time AI-powered analytics services that process text and can help content authors refine their targeted communications.

IBM Watson Content Hub powers digital experiences

IBM Watson Content Hub provides a number of capabilities that help users content-enable applications, including mobile apps, single page applications, billboards, and IoT. APIs allow developers to access content for use in other applications. AI provides services such as Visual Recognition, which applies cognitive tags to digital assets to create searchable libraries. Visual

Recognition understands the contents of images, analyzing them for scenes, objects, faces, colors, food, or explicit content, then automatically defines an array of specific tags for each asset.

Digital Experience Manager provides prebuilt connectors for popular enterprise applications

Web application development tooling included with the Digital Experience Manager solution provides prebuilt connectors for popular enterprise applications as well as native web and REST services support, which allows integration with a broad range of applications such as Salesforce, SugarCRM, and other standards-based service enabled systems. Integration capabilities are also included for back-end and third-party data and applications, allowing rich content to be used in engaging experiences, such as a transactional banking digital experience.

Developers can use their tools of choice

Support of open standards frameworks and APIs and developer tools of choice allow developers and designers to work with standard modern web technology such as HTML, JavaScript, and CSS files; JS libraries and frameworks such as Angular, Bootstrap, Handlebars, and jQuery; as well as modern web development and design tools.

Weaknesses

The size of IBM's portfolio might be too extensive for some organizations

IBM provides an extremely 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 smaller companies to implement an enterprise solution.

Opportunities

A growth in digital channels is providing opportunities for IBM to extend its reach

The increase in channels that enterprises must now produce content for is driving a demand for decoupled architectures that allow the experiences to be created and managed by line-of-business users, while front-end developers can deliver the experience to virtually any digital channel via open APIs. IBM supports both decoupled and headless architectures, which allow content to be delivered to new and emerging channels as well as more traditional channels.

AI provides opportunities for users to work more efficiently

AI features that are embedded throughout the IBM WEM portfolio allow users, including content managers, marketers, and merchandisers, to work more efficiently. This is done through the elimination or reduction of mundane tasks, such as the analysis of audio, text, and visual data in multimedia content via Watson Video Enrichment and Natural Language Interaction for building and deploying chatbots and virtual agents with Watson Conversation.

Threats

The WEM market is crowded with vendors

There are a large number of competitors in the WEM space, including enterprise content management (ECM) vendors that attempt to provide end-to-end content management capabilities such as WEM and specialist WEM vendors. A number of vendors also are attempting to provide end-to-end digital experience management solutions by combining marketing automation, e-commerce,

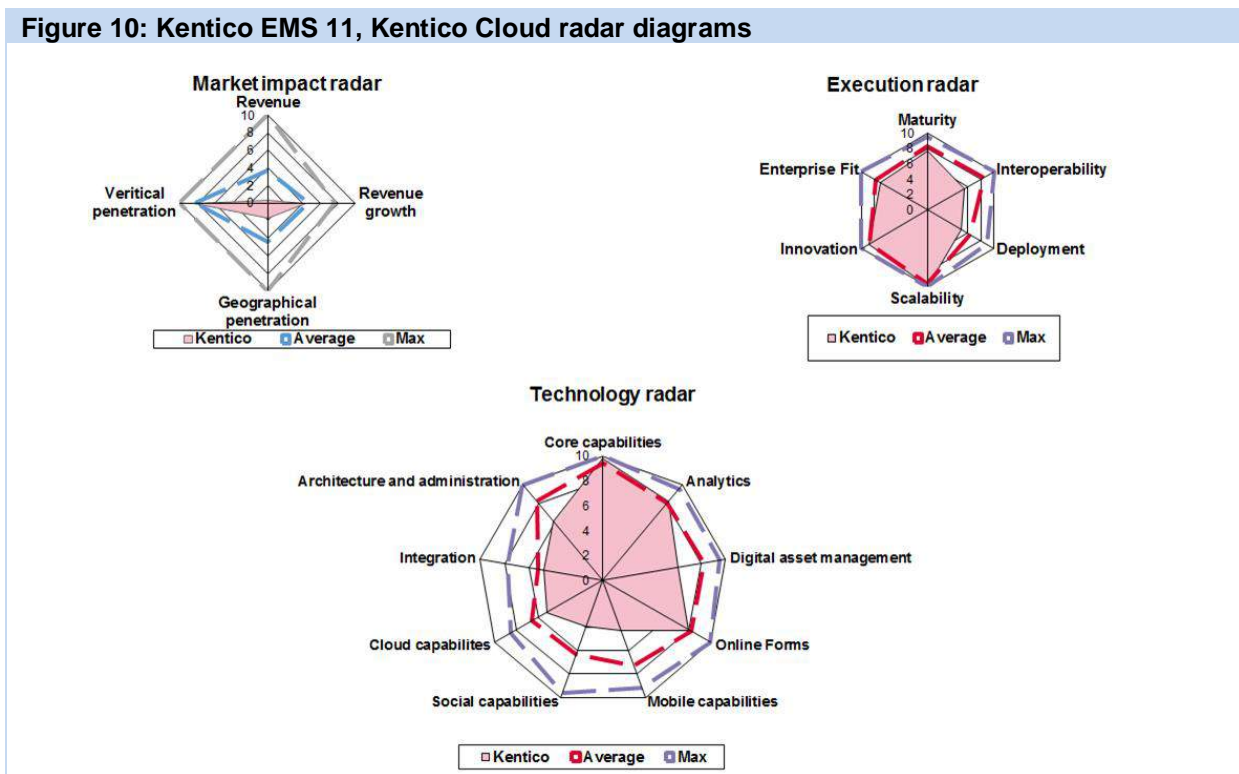
and WEM capabilities. IBM is an ECM vendor, but it also provides e-commerce and marketing automation products, which means it can provide end-to-end capabilities.

Enterprises need to update their web content management (WCM) platforms

A large number of organizations are still using dated WCM platforms. They may believe that a responsive mobile-first environment is sufficient and therefore are reluctant to move to the latest WEM platform. WEM vendors such as IBM need to communicate the message that a modern WEM platform with a headless or decoupled architecture is required to support new and emerging customer touchpoints.

Kentico EMS 11, Kentico Cloud (Ovum recommendation: Challenger)

Figure 10: Kentico EMS 11, Kentico Cloud radar diagrams



Source: Ovum

Ovum SWOT Assessment

Strengths

Kentico EMS provides an all-in-one platform for WEM, marketing, and e-commerce

Kentico provides a single platform that addresses requirements in portal (WCM), e-commerce, intranet, community, and online marketing scenarios. It runs on the Microsoft .NET platform and can be deployed on-premises or in the cloud. The advantage of a fully integrated solution is that it provides marketers with all the tools they need in a single solution. Kentico shares information across all marketing tools and integrates with existing customer relationship management (CRM) and enterprise resource planning (ERP) systems, removing the problem of inconsistent customer data stored in multiple silos.

Marketing automation features are provided out-of-the-box

A number of features are included that, while not providing an entire marketing automation solution, will satisfy the requirements of many mid-sized organizations. Rules-based conditions can be set within processes to determine the content that each visitor is shown at each stage of their 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.

Intranets, extranets, client portals, and custom collaboration solutions can be installed, configured, and deployed

A number of features facilitate collaboration within Kentico. A workgroups module provides a collaboration environment for employees or partners to collaborate on projects, share ideas, and upload documents. Integration with SharePoint allows a bi-directional flow of content from SharePoint to Kentico websites from a single screen. User-generated content support allows authorized users to create content on a live website without using the administration interface. This is a useful feature for community sites where visitors can share expertise, knowledge, and ideas with others. The workflow designer allows administrators to track, manage, and approve content through each stage of the publishing process. Approval processes can be designed and customized.

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, allowing them to 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.

Weaknesses

Does not include social network monitoring capabilities

Kentico 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.

Opportunities

Kentico's e-commerce capabilities will appeal to mid-sized organizations

Kentico EMS provides some e-commerce capabilities, and although it is not a full-blown e-commerce application, it will provide features that will satisfy the requirements of some organizations. It includes integration with third-party ERP, CRM, and payment gateways. Other features include a customizable checkout process, the ability to apply discounts and promotions, and integration with Ucommerce's e-commerce platform for more extensive capabilities. These features should provide opportunities for Kentico to increase sales in mid-market organizations.

Growing interest in the cloud provides opportunities for growth

The number of WEM cloud deployments is growing rapidly, and Kentico should benefit from this, particularly as mid-sized organizations have traditionally been keener to adopt cloud technologies than large enterprises. With its headless architecture, Kentico's cloud proposition should appeal to a wide range of organizations.

Threats

The WEM market is crowded with vendors

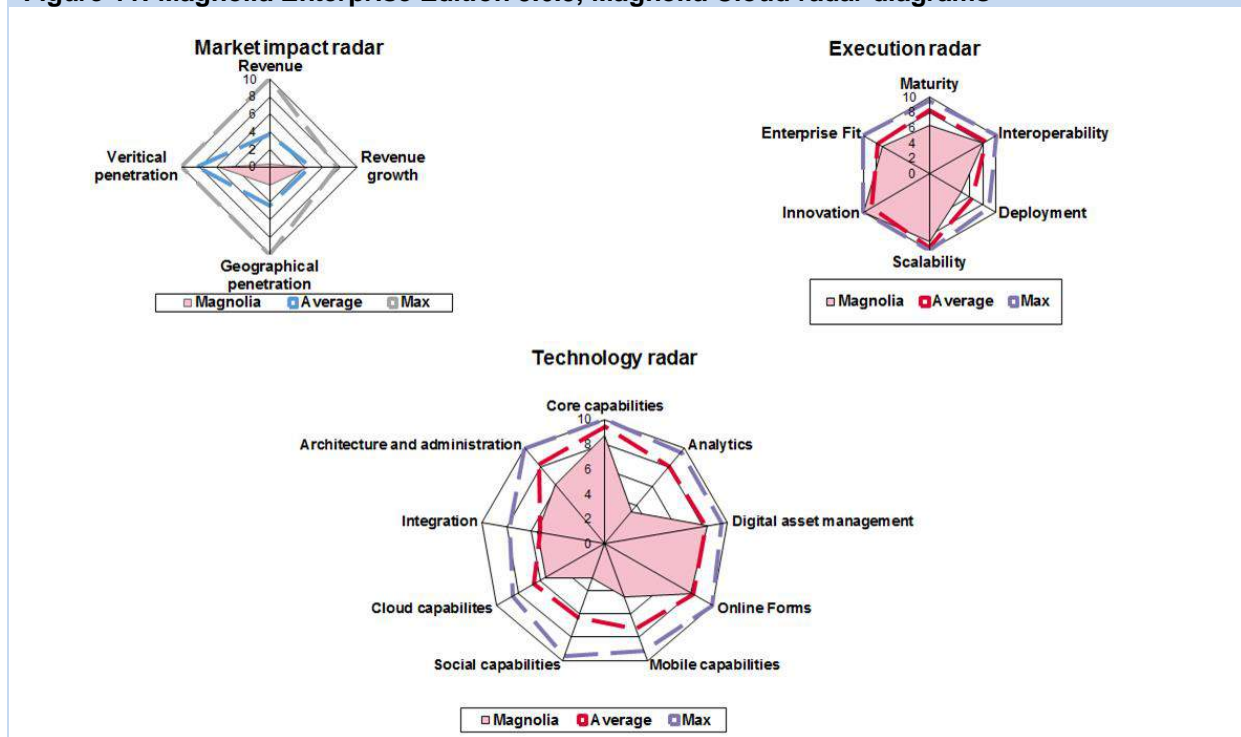
There are a large number of competitors in the WEM space, including enterprise content management (ECM) vendors that attempt to provide end-to-end content management capabilities including WEM, and specialist WEM vendors. There are also a number of vendors, including Kentico, that are attempting to provide end-to-end digital experience management solutions by combining marketing automation, e-commerce, and WEM capabilities. However, Kentico's focus on mid-market organizations is a different approach to many of these competitors that are targeting large enterprises.

Enterprises need to update their web content management (WCM) platforms

There are still a large number of organizations that are using dated WCM platforms. They may believe that a responsive mobile-first environment is sufficient and therefore be reluctant to move to the latest WEM platform. WEM vendors such as Kentico need to communicate the message that a modern WEM platform with a headless architecture is required to support new and emerging customer touchpoints.

Magnolia Enterprise Edition 5.6.5, Magnolia Cloud (Ovum recommendation: Challenger)

Figure 11: Magnolia Enterprise Edition 5.6.5, Magnolia Cloud radar diagrams



Source: Ovum

Ovum SWOT Assessment

Strengths

Magnolia supports the rapid development of web experience scenarios

Magnolia has improved the usability for developers for the past three years, 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.

Magnolia uses smartphone-inspired apps

Magnolia has abandoned the tool bars that are normally associated with WCM systems and has adopted a more mobile-friendly app system for selecting features that is easy to learn and use. Applications are displayed as tiles, and many apps are available out of the box, with the thriving community helping extend the product through the development of additional apps. Apps can also be customized to suit an enterprise's requirements.

The DAM module stores all assets in a centralized location

Assets can be viewed, managed, and edited in the Assets app. Assets can be used on pages with links to the repository created to access them. This means that if the master image in the DAM repository is changed, it is reflected on all web pages where the asset is used the next time it is viewed. All assets, including images, videos, audio, Flash, and documents, can be stored in the DAM system. By default, the DAM system supports the Dublin Core metadata standard, but additional standards can be added. Basic editing features are available, and although it is not designed for enterprises with very complex asset management requirements, it will address the needs of a large proportion of enterprises.

The Stories app allows free-form content to be quickly produced without any page-hierarchy constraints

The Stories app is ideal for semi-structured content such as blogs or news stories. It combines structured components such as title, dateline, and author with the unstructured body, which can include images, text, videos, and links. It is more flexible than structured web pages. With connectors to e-commerce platforms, it is also ideal for less structured catalogs.

Weaknesses

Limited social capabilities provided

Magnolia includes some social features, but it does not provide any analytics that would allow 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 in order to monitor social activity, as this is a feature that all organizations require in order to respond in a timely fashion to negative brand comments.

Opportunities

Magnolia can benefit from the increased popularity of cloud

Magnolia Cloud is a platform-as-a-service version of Magnolia CMS, which is hosted on Amazon Web Services, using a separate instance for each customer. Magnolia is able to guarantee data sovereignty, due to the global reach of AWS, as it can quickly deploy its platform to a new region as required.

Magnolia can exploit its open source credentials to increase its market share

Open source is 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 the

opportunity to extend its reach into the public and government sectors, but it can also increase its market share in the private sector where the use of open source is also increasing.

Threats

The WEM market is crowded with vendors

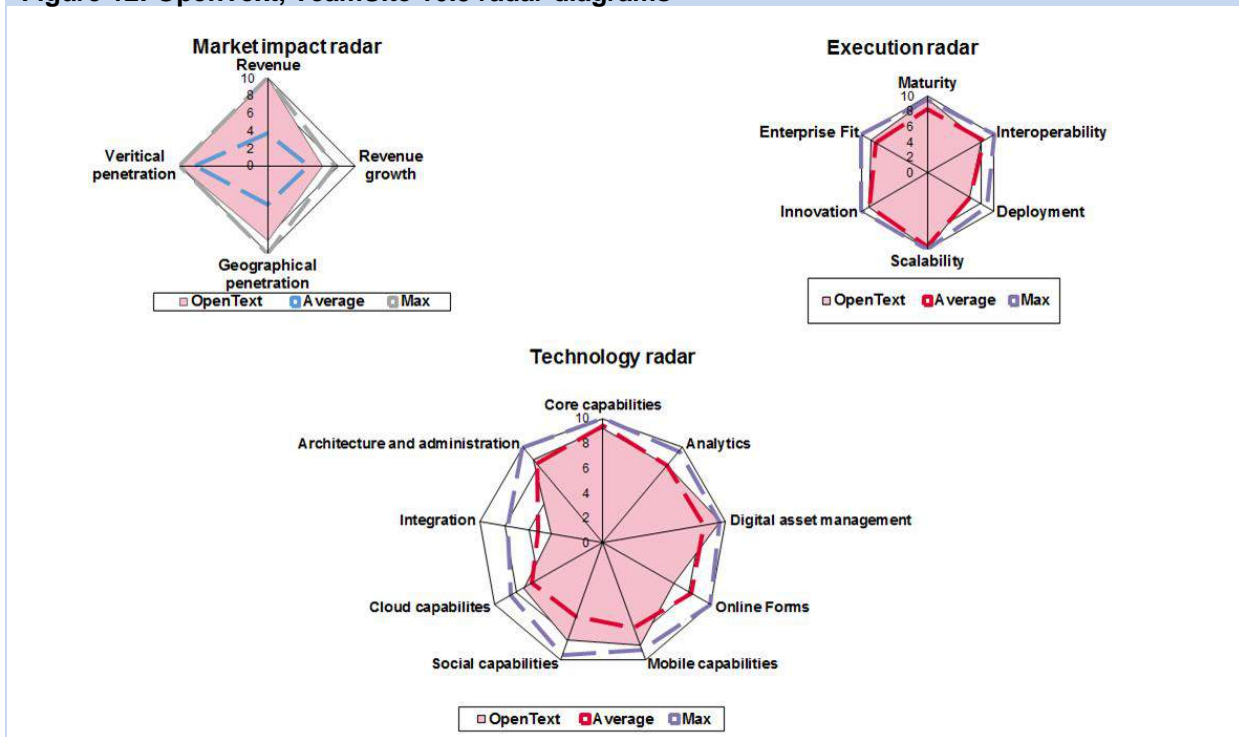
There are a large number of competitors in the WEM space, including enterprise content management vendors that attempt to provide end-to-end content management capabilities such as WEM, as well as specialist WEM vendors such as Magnolia. A number of vendors are also trying to provide end-to-end digital experience management solutions by combining marketing automation, e-commerce, and WEM capabilities in an attempt to offer a one-stop-shop approach. However, Magnolia can benefit from the growing popularity of open source.

Enterprises need to update their web content management (WCM) platforms

A large number of organizations are still using dated WCM platforms. They may believe that a responsive mobile-first environment is sufficient and therefore be reluctant to move to the latest WEM platform. WEM vendors such as Magnolia need to communicate the message that a modern WEM platform with a headless or decoupled architecture is required to support new and emerging customer touchpoints.

OpenText, TeamSite 16.3 (Ovum recommendation: Leader)

Figure 12: OpenText, TeamSite 16.3 radar diagrams



Source: Ovum

Ovum SWOT Assessment

Strengths

Integrated multichannel analytics is included

Analytics is provided by Google Analytics and OpenText Experience Analytics, which support behavioral analysis including clickstream data as well as structured and unstructured information. Social and application data can be captured and displayed through visual dashboards and reports by OpenText Experience Analytics, using Big Data Analytics and Visualizer.

Headless CMS separates content from the presentation

TeamSite provides headless and decoupled CMS, which allows content to be pushed out to third-party applications using APIs. The advantage of this approach is that content can be displayed through any channel. It is an ideal architecture for the delivery of microservices.

Integration is available with a large number of social networking sites

OpenText TeamSite can integrate with a large number of social networking sites, both consumer and enterprise focused. Social content has become increasingly important as an advertising platform and for initiating conversations around a brand. The high number of integrations include Atom, Blogger, Dribbble, Facebook Page, Fancy, Flickr, Formspring, Google+, Hypem, Instapaper, LinkedIn, Pinboard, Reddit, RSS, SlideShare, Tumblr, Twitter, Vimeo, Wikipedia, WordPress, and YouTube. In addition, integrations are provided to the following enterprise social collaboration platforms: Jive, Yammer, Chatter, Citrix Podio, IBM Connections, Cisco WebEx Social, and Social Text. This is supported by strong social capabilities.

OpenText offers Intelligent Forms Automation to allow online forms from customers to be processed

OpenText Intelligent Forms Automation allows enterprises to collect, validate, and process forms from customers and employees, facilitating two-way interaction. Processes that use the forms can be automated, with the information collected and routed to the people and systems that need it, ensuring that customer requests are processed quickly and efficiently. Forms can be designed via drag-and-drop and can be versioned, localized, and published in the same way as other artifacts in the system. Forms can be added to any LiveSite page but can also be accessed in a headless fashion from any custom display engines. Support for Single-Page Application (SPA) allows customers to manage and publish highly usable customer experiences to their intended end-users. Content edits can be made within SPA and pages that include SPAs previewed.

Weaknesses

OpenText's large portfolio of products can act as a deterrent

OpenText's great strength can also be a weakness. It has a large portfolio of WEM-related products, which allows it to provide enhanced and engaging customer experiences. However, some of the features that provide these experiences are available only in add-on products, which may mean licensing multiple products to create a solution

Opportunities

Artificial intelligence offers the opportunity to take analytics to a new level

Magellan machine learning will provide AI and automatic segmentation and targeting by using customer behavioral data collected and stored in the OpenText Experience Center CDP. When implemented, this will provide OpenText with additional opportunities to increase its market share, as analytics becomes more important in enhancing the customer journey.

OpenText has the opportunity to be a leading content service hub provider

A number of drivers are moving personalized digital experiences beyond customer acquisition in a continuous customer journey. These include changing rules of customer engagement that focus on customer retention and orientation; a demand from customers for versatility in content delivery, which must be through any interface via headless content services and omnichannel delivery; and mobile experiences that must reflect the differences in how customers engage on mobile compared to desktops.

Threats

The WEM marketplace is crowded with products

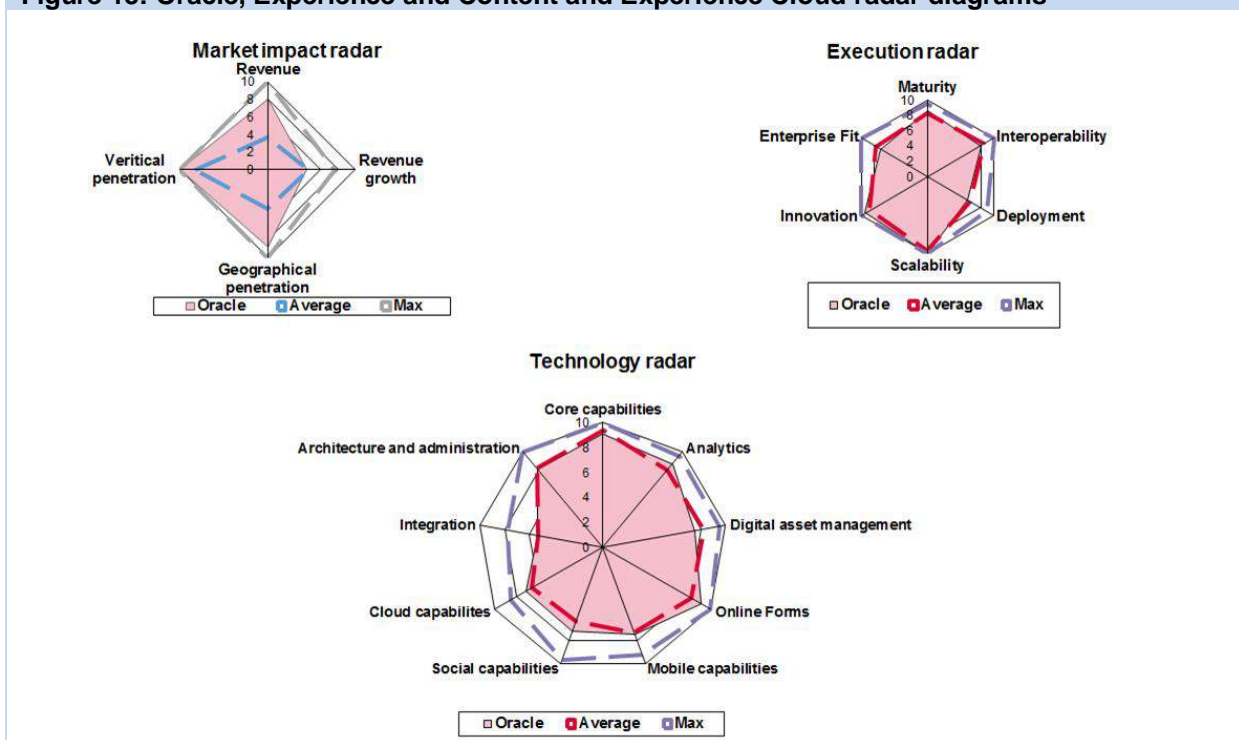
A large number of WEM products are available, making it difficult for enterprises to select the solution that best suits their requirements, especially as much of the standard functionality is now commoditized. OpenText needs to ensure that it continues to develop differentiators, such as advanced analytics in areas such as AI, which not every vendor has.

Enterprises need to update their web content management platforms

A large number of organizations are still using dated WCM platforms. They may believe that a responsive mobile-first environment is sufficient and therefore are reluctant to move to the latest WEM platform. WEM vendors such as OpenText need to emphasize the importance of a modern headless architecture to enable true multichannel digital experiences.

Oracle, Experience and Content and Experience Cloud (Ovum recommendation: Leader)

Figure 13: Oracle, Experience and Content and Experience Cloud radar diagrams



Source: Ovum

Ovum SWOT Assessment

Strengths

Experience Builder enables the visual creation of mobile-first websites

Out-of-the-box templates and components are provided to allow enterprises to rapidly build websites. A drag-and-drop interface allows widgets to be dragged onto a page. An embeddable content library and integrations with native Oracle apps are available. Once built, sites can be saved as templates, which are stored in the Template Catalog and can be reused to quickly build further sites. Templates can be imported and exported, and bootstrap templates can easily be adapted for use in catalogs.

Extensive analytics provide valuable insights into visitor behavior

Analytics capabilities provide valuable information on how different personas interact with each channel, allowing marketers to target visitors with the right content at the right time and through the most appropriate channel. Users can gain insights on how to improve engagement with customers through the metrics provided. A/B and multivariate testing allow marketers to test the effectiveness of different page layouts and content to ensure that the optimum content is offered to all visitor segments.

Oracle CEC: BOT Builder (Extension) provides an environment for building intelligent bots

Chatbots can be created using Oracle CEC: BOT Builder (Extension), which is integrated with AI and natural language processing, powered by neural networks and machine learning, to model human queries. A development environment is provided to manage the code to model the interactions. A content API fetches content for the bot replies. Bots can be exposed through many chat and voice channels, custom mobile apps, and websites.

Users can review and collaborate on digital assets

Users are able to search, access, and view assets, including corporate graphics, designs, logos, stock photography, videos, presentations, documents, audio, and brand assets. Assets can be arranged into collections, which is a way to organize assets for a new site, marketing campaign, or project, and asset approval, workflow, and publishing are provided, supporting collaboration. A useful feature is the ability for users to author content such as blogs or news articles with different layouts for delivery through different channels.

Weaknesses

Oracle has a limited number of connectors

Connectors are provided for marketing automation and e-commerce products, but these are mainly from Oracle. While these are widely deployed products, the company also needs to develop connectors to a range of third-party products as not all customers will want to use Oracle products for all of their marketing requirements. However, Oracle does offer extensive APIs to support integrations with other systems. It is in discussions with various vendors to enable them to build integrations to push video, social, and other such content to Oracle Content and Experience Cloud. Oracle will also add connectors to Box and Google Drive. This will allow the integration, management, and publication of any content.

Opportunities

Enterprises should be digitally transforming

Enterprises should have commenced digital transformation, and WEM is an important element of this. The implementation of solutions that support the customer journey across multiple channels and devices, delivering relevant, targeted, personalized content, is vital if enterprises are to remain relevant. A modern WEM solution that can be delivered as a cloud service with a headless architecture supported by microservices, that is mobile first, and that provides extensive social as well as AI and machine learning is vital in any digital transformation initiative. Oracle is ideally placed to benefit from the demand for WEM solutions that provide the modern architectures and services required for digital transformation.

Content and Experience Cloud provides Oracle with the opportunity to increase its share of the growing market for cloud

Oracle's Content and Experience Cloud is hosted on Oracle Cloud, which has multiple data centers located throughout the world. This allows Oracle to be able to ensure data sovereignty in most cases. Content and Experience Cloud is a full-featured solution that, along with other Oracle products, allows the vendor to provide end-to-end WEM, marketing, and commerce solutions. With its extensive portfolio and cloud capabilities, Oracle has the opportunity to grow its share of the WEM market.

Threats

The WEM market is crowded with vendors

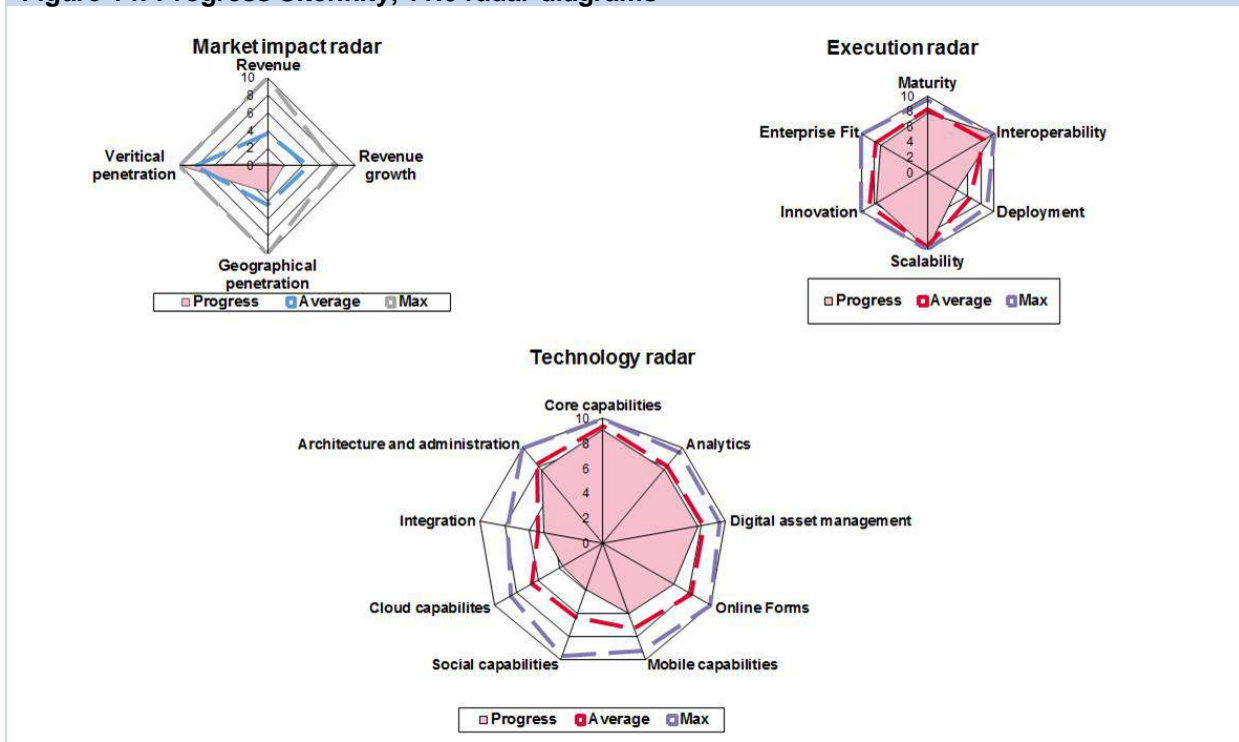
There are a large number of competitors in the WEM space, including enterprise content management (ECM) vendors that attempt to provide end-to-end content management capabilities such as WEM, as well as specialist WEM vendors. Also, a number of vendors are attempting to provide end-to-end digital experience management solutions by combining marketing automation, e-commerce, and WEM capabilities. Oracle is an ECM vendor, but it also provides e-commerce and marketing automation products, which means it can provide end-to-end capabilities.

Enterprises need to update their web content management (WCM) platforms

A large number of organizations are still using dated WCM platforms. They may believe that a responsive mobile-first environment is sufficient and therefore be reluctant to move to the latest WEM platform. WEM vendors such as Oracle need to communicate the message that a modern WEM platform with a headless architecture is required to support new and emerging customer touchpoints.

Progress Sitefinity, 11.0 (Ovum recommendation: Challenger)

Figure 14: Progress Sitefinity, 11.0 radar diagrams



Source: Ovum

Ovum SWOT Assessment

Strengths

Progress Sitefinity delivers highly personalized experiences

Sitefinity provides a number of features that help enterprises to personalize customer experiences. These include segmentation so that the most relevant content can be delivered to each customer. Content can be previewed for any segment on any device using mobile device emulators to ensure that the right content is being delivered to each segment. This enables users to view how the website looks for each audience on every device. Conversions can be measured for each segment and these can be measured against conversions for the default content presented to non-segmented visitors.

Contextual analytics provides insight into content performance

Tight integration with Google Analytics provides information about web content performance. Results are displayed in dashboards through the built-in Analytics Module. Analytics can be applied to monitor the performance of a page or any part of a page. Features include recording the number of sales, the number of hits per page, how visitors arrive at the site, and the effectiveness of the use of landing pages, as well as collecting geolocation information, monitoring how users navigate through the site, and collecting detailed profiling information. In addition, A/B and multivariate testing are supported.

Digital asset management (DAM) is included in the portfolio

Sitefinity DAM supports the storage of thousands of digital assets including images, graphics, PDFs, text files, video, and audio. Entire folders can be dragged-and-dropped directly into media libraries while the file hierarchy is maintained. Features include a dedicated repository for the storage of

assets, support for video, a full audit trail of all actions performed on assets, meta-tagging, and repurposing of assets for delivery through multiple channels.

Integrations extend the WEM capabilities

A number of connectors are provided for integration with specific products. These include SharePoint, Google Analytics, Dropbox, Salesforce, MaxMind GeoLite Database, Akismet Spam Protection, Lucene Search, XE Exchange Rate Service, and PayPal Payflow Pro. In addition, by using APIs, integrations can be built to most applications and microservices.

Weaknesses

Limited social capabilities are provided

Sitefinity provides some social capabilities, but features such as crawling social media sites for brand mentions, sentiment analysis, reviews, and ratings are missing. In addition, integration to social media sites is limited to Facebook and Twitter. More social capabilities would allow enterprises to build externally facing community sites and internal social sites to encourage interaction between employees. Progress plans to provide full social capabilities in a future release.

Opportunities

Progress is able to help marketers to develop and deliver campaigns faster

Using the API first core within Progress Sitefinity, developers are able to help marketers serve content across multiple channels allowing campaigns to be built and delivered quickly. This speed of delivery should help to drive sales of Progress Sitefinity.

Increased interest in cloud offers Progress opportunities

Cloud is attracting a high level of interest in the WEM market place, with most vendors experiencing increased take-up of cloud deployments. Progress is no exception, and the cloud options available to customers, including private clouds hosted by Progress on Azure and public cloud options on Azure or AWS, provide the vendor with the opportunity to increase its customer base.

Threats

The WEM market is crowded with vendors

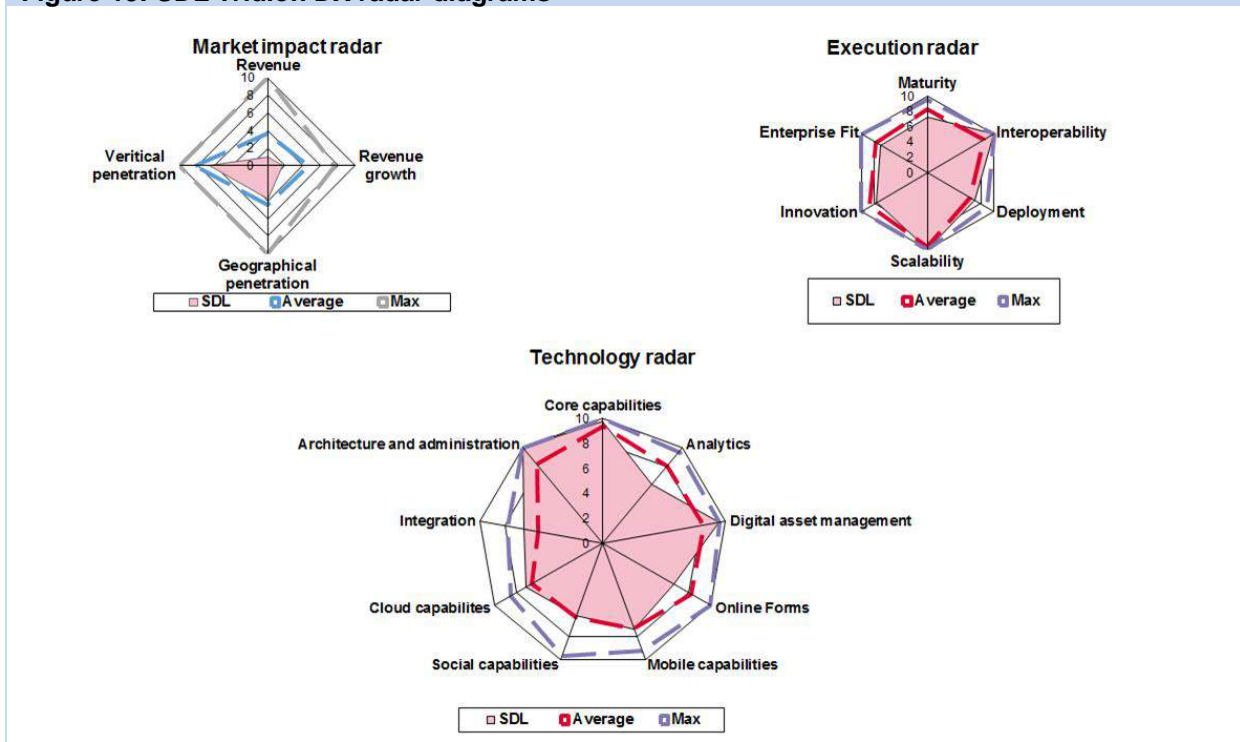
There are many vendors in the WEM market space including both specialized WEM vendors and enterprise content management (ECM) vendors that aim to provide end-to-end capabilities for the management of content. In addition, some vendors are expanding into e-commerce and marketing automation areas in an attempt to offer full digital experience management capabilities. This can make the choice of WEM vendor difficult. Progress is a little different in that it is perceived as being an application development vendor. Its marketing initiatives for its WEM products are therefore very important, as it has extensive WEM capabilities, which makes it ideal for creating engaging digital experiences.

Enterprises need to update their web content management (WCM) platforms

There are still a large number of organizations that are using dated WCM platforms. They may believe that a responsive mobile-first environment is sufficient, and therefore be reluctant to move to the latest WEM platform. WEM vendors such as Progress need to communicate the message that a modern headless architecture is required to enable true multichannel digital experiences.

SDL Tridion DX (Ovum recommendation: Leader)

Figure 15: SDL Tridion DX radar diagrams



Source: Ovum

Ovum SWOT Assessment

Strengths

Experience optimization is achieved through analytics

Personalized experiences are delivered in real time by analyzing web-session data as well as customer data from the CMS and other external systems, such as customer relationship management systems. Visitor information is collected as users navigate through the site. Using customer behavior, visitors can be segmented and delivered the most appropriate content. Customer journey mapping means that a visitor's position in the sales cycle can be recorded. Also included are A/B and multivariate testing to allow the delivery of optimum content.

BluePrinting manages content relationships and dependencies across languages, brands, and channels

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

APIs and connectors allow integration with microservices and third-party applications

There are integrations with third-party CRM, marketing automation, and e-commerce products, as well as other content management products. In addition, APIs ensure that SDL Tridion DX can integrate with virtually any application. Product connectors are made available in a variety of ways. Some are provided out the box with SDL products, they may be delivered separately (if chargeable), or they can be acquired as add-ons via the SDL AppStore. Additionally, SDL translation management and machine translation products have integrations with a large number of applications, including SDL Tridion DX.

Artificial intelligence (AI) and machine learning help deliver personalized content

By using AI and machine learning, marketers can deliver the right content in the right context across all touchpoints. Using cognitive technology, SDL combines human insight and understanding with machine learning and AI to automate personalized content.

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

Headless architectures provide opportunities by addressing the needs of growing numbers of enterprises

Enterprises in some industries such as financial services are building service layers that sit on top of back-end systems such as WCM. This requires a headless architecture. SDL customers can achieve this in two ways: through a headless on-premises deployment model or its content-as-a-service (CaaS) deployment model. In the latter case, the back-end WCM system is hosted by SDL, and the service layer and front-end technologies by the customer.

The combination of WEM and translation software drives additional opportunities

The global nature of the web means that content needs to be translated into multiple languages if enterprises are to expand their reach. The ability to streamline and manage the translation process in a more efficient way can be a factor in the choice of WEM solution. Integration of SDL's WEM and translation technologies can therefore be a decisive factor in the choice of WEM system.

Threats

The WEM market is crowded with vendors

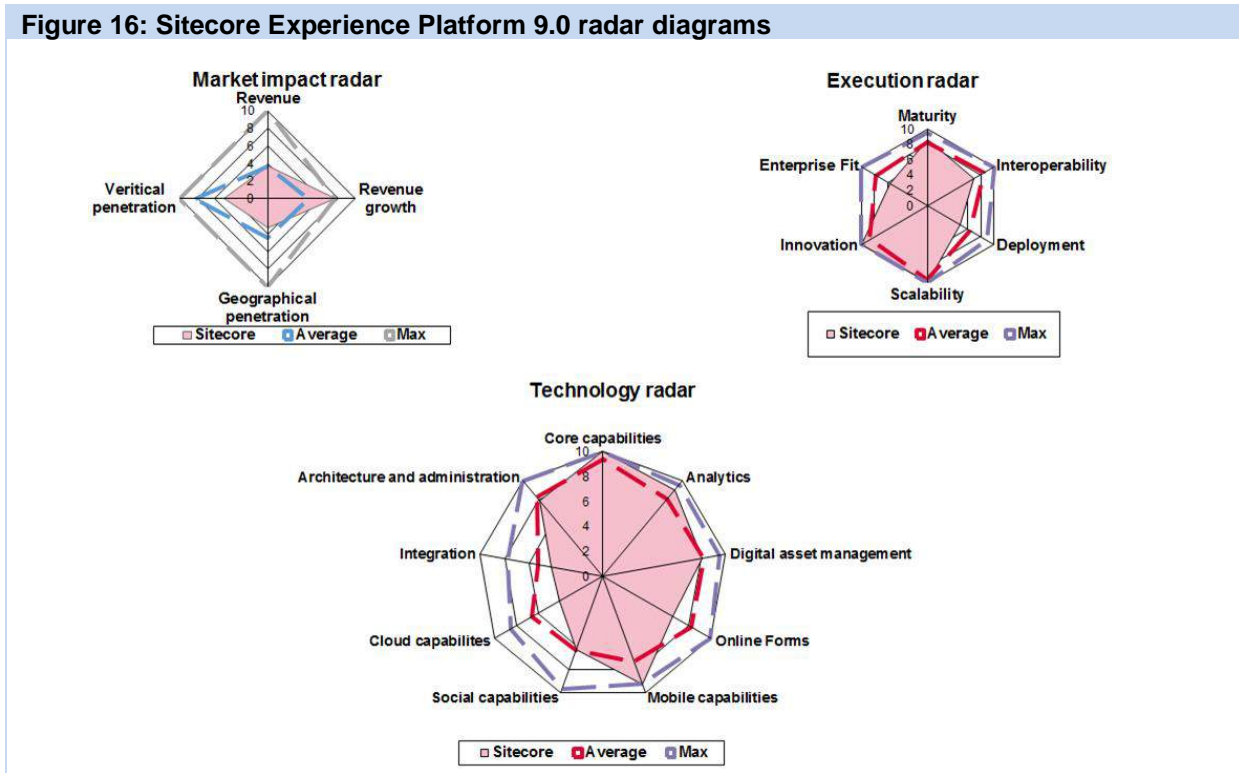
There are a large number of competitors in the WEM space, including enterprise content management vendors that attempt to provide end-to-end content management capabilities such as WEM, as well as specialist WEM vendors including SDL. A number of vendors are also trying to provide end-to-end digital experience management solutions by combining marketing automation, e-commerce, and WEM capabilities in an attempt to offer a one-stop-shop approach. However, SDL's translation capabilities provide an advantage over its competitors. In addition, its best-of-breed approach helps distinguish it for enterprises looking to get away from lock-in of a single-vendor suite, which may lack the functionality of disruptive and emerging technologies, leaving them with fewer options to deliver next-generation digital experiences.

Enterprises need to update their web content management platforms

A large number of organizations are still using dated WCM platforms. They may believe that a responsive mobile-first environment is sufficient and therefore be reluctant to move to the latest WEM platform. WEM vendors such as SDL need to communicate the message that a modern WEM platform with a headless or decoupled architecture is required to support new and emerging customer touchpoints.

Sitecore Experience Platform 9.0 (Ovum recommendation: Leader)

Figure 16: Sitecore Experience Platform 9.0 radar diagrams



Source: Ovum

Ovum SWOT Assessment

Strengths

Sitecore XP creates a single view of the customer through integrations with other systems

Sitecore XP is a single customer experience platform that combines WCM, personalization, application integration, marketing automation, email marketing, social media, optimization, and analytics. Native integration is provided with Experience Commerce. It also integrates with third-party platforms such as enterprise resource planning, customer relationship management, and customer service, as well as non-Sitecore websites. Sitecore XP captures all interactions from these systems to create a single view of the customer in a big data marketing repository, the Experience Database, which can share this customer information with other systems.

Personalization and context marketing capabilities help deliver engaging experiences

Marketers can collect and analyze key customer attributes in real time, based on location, device, and behavior. By integrating that information with purchase history, demographic data, behavioral trends, and activity across touchpoints, personalized customer experiences can be created, and automated activities introduced across touchpoints to increase conversion, customer satisfaction, and lifetime value.

Automated testing and optimization is achieved through content recommendations

Sitecore XP includes machine learning and AI, which helps marketers provide customers with the optimal experience. It recommends the best content, best segments to target, and best paths to conversion, and it automatically writes the rules to optimize this. Machine learning is also used to

estimate the engagement value to provide an indicator of the future value of exchange between the enterprise and visitor. Path analysis allows users to see where interactions are going wrong as well as where they are performing well, helping marketers optimize content.

Sitecore XP is fully customizable

Sitecore XP can be customized to give users the functionality they require by hiding the features that are not needed. Multichannel campaigns can be connected using a single tool, and workflows, taxonomies, and processes are enabled in a way that aligns with how teams operate.

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 the cloud as well as on-premises. Deploying in the 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.

Opportunities

Sitecore's cloud-first strategy will allow it to benefit from the growing interest in cloud deployments

With its cloud-based headless architecture, Sitecore is ideally placed to service the needs of marketers to manage content as a channel-agnostic service that can be seamlessly distributed, repurposed, and reused across multiple sites, channels, and a variety of endpoints. Sitecore offers two cloud options: Sitecore Managed Cloud – Standard is hosted on Microsoft Azure and delivered by Sitecore Cloud Operations, and it is ideal for SMB to upper midmarket organizations; Sitecore Managed Cloud – Premium is powered by Rackspace, again on Azure, and is suited to enterprise customers with strict compliance requirements.

Sitecore has taken steps to help enterprises using its products comply with GDPR

Sitecore has added a number of features to help enterprises comply with legislation such as the General Data Protection Regulation. These include encrypting content in motion to help secure it. Sitecore has also added features for personally identifiable information, by allowing users to determine which fields contain personal information, providing the ability to locate all data pertaining to an individual, and then deleting that data. As enterprises upgrade or migrate WEM solutions, they must ensure that the solution selected provides features to help with GDPR compliance.

Threats

The WEM market is crowded with vendors

There are a large number of competitors in the WEM space, including enterprise content management vendors that attempt to provide end-to-end content management capabilities such as WEM, as well as specialist WEM vendors. Also, a number of vendors, including Sitecore, are attempting to provide end-to-end digital experience management solutions by combining marketing automation, e-commerce, and WEM capabilities in an attempt to offer a one-stop-shop approach.

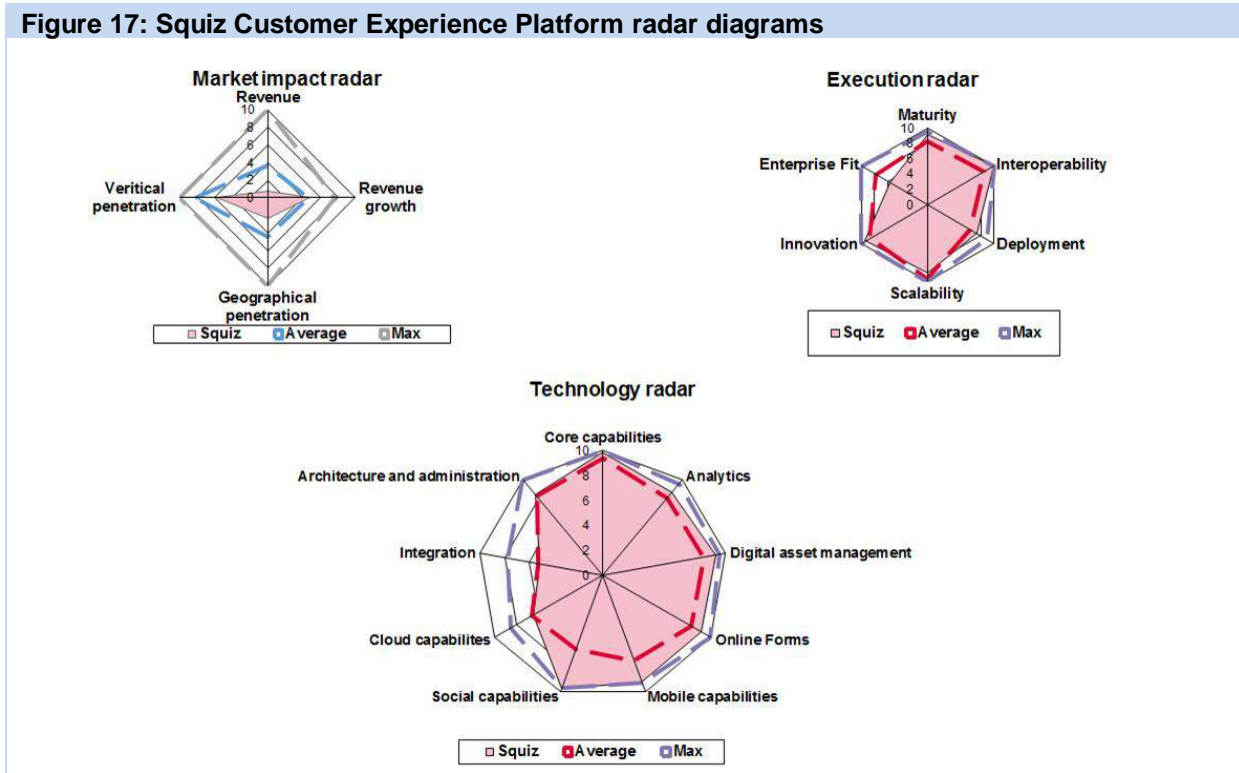
Enterprises need to update their web content management platforms

A large number of organizations are still using dated WCM platforms. They may believe that a responsive mobile-first environment is sufficient and therefore be reluctant to move to the latest WEM

platform. WEM vendors such as Sitecore need to communicate the message that a modern WEM platform with a headless or decoupled architecture is required to support new and emerging customer touchpoints.

Squiz Customer Experience Platform (Ovum recommendation: Leader)

Figure 17: Squiz Customer Experience Platform radar diagrams



Source: Ovum

Ovum SWOT Assessment

Strengths

Squiz CXP provides a flexible system for creating and managing content

Squiz CXP provides editing interfaces and digital asset management (DAM) tools to allow all staff – regardless of skill level – to create, manage, and publish multilingual content. Centrally managed editor controls determine the level of autonomy of content creators depending on the customer’s preferred publishing model.

Asset management is included in the portfolio

Squiz CXP uses an “asset model” for the management of all content and system rules. Stored assets within the system can be pages, sites, files (including multimedia files), designs, workflows, users, metadata schema, groups, roles, triggers, and integrations. Assets can easily be reused, consistent governance is facilitated, and configuration is easily achieved using a GUI.

Content analytics and insights help marketers to enhance customer experiences

A range of content analytics are provided to help marketers personalize the customer journey. Analytics are provided by Google Analytics and Funnelback, including the new Funnelback Graph, and are displayed through Squiz dashboards. Features include targeted marketing, real-time website

metrics and reporting, the number of website visits and sales, the number of hits per page, and the collection of geolocation information. Funnelback Graph provides automated insights using content and data.

System governance is supported

Governance and compliance are becoming increasingly important, especially with the introduction of the General Data Protection Regulation (GDPR) in the EU. Squiz CXP provides a set of tools for system governance. These include full audit trails, versioning, and record keeping, as well as granular permissions and rules, a publishing workflow, link integrity management, Web Content Accessibility Guidelines (WCAG) compliance, system auditing, and security management, including nightly automated security audits on Squiz's PaaS platform.

Weaknesses

There are currently few generic integrations

While the CXP has been designed as an open, integration-focused platform, and ships with connectors to CRM, marketing automation, analytics, ECM, and document management tools, compared to some vendors, there are a limited number of connectors to third-party systems. The platform allows developers freedom in server and client-side integrations, and more generic integrations are on the Squiz roadmap for future releases. With a growing customer base of high-volume transactional sites and digital service delivery, Squiz is also planning integrations with leading product information management solutions and digital commerce platforms.

Opportunities

Enterprises' digital transformation initiatives will provide Squiz with additional opportunities

Focusing on helping enterprises to digitally transform should provide Squiz with the opportunity to increase its share of the WEM market. Squiz has developed its portfolio to be quick to implement, and its ability to provide content and asset management, service delivery orchestration, integration-as-a-service, workflow, personalization, and real-time analytics will appeal to many enterprises undertaking digital transformation initiatives.

Enterprises are demanding increased connectivity

Demands for increased connectivity of people, places, and things to drive the delivery of improved experiences has resulted in Squiz investing in speech interfaces, IoT, AR, and VR. Vendors, such as Squiz, that are investing in these areas will gain competitive advantage over those that are not.

Threats

The WEM market is crowded with vendors

There are a large number of competitors in the WEM space, comprising enterprise content management (ECM) vendors who attempt to provide end-to-end content management capabilities that include WEM, as well as specialist WEM vendors such as Squiz that are maturing into digital service delivery platforms. There are also a number of vendors that are attempting to provide end-to-end digital experience management solutions by combining marketing automation, e-commerce, and WEM capabilities. However, with Squiz's support for a headless architecture and its integration capabilities, enterprises can easily integrate their preferred marketing automation and e-commerce products to create a best-of-breed approach to digital marketing.

Some enterprises may be reluctant to deploy open source solutions

Some enterprises may still be reluctant to implement open source solutions, believing that they are lightweight and associating them with being “free” software rather than the commercialized products they have become. Squiz is an innovator in the WEM space. It is one of the most extensive WEM products in terms of features and functions, and Squiz continues to develop AI and machine learning capabilities in its Funnelback product to further extend its capabilities.

Appendix

Methodology

Use this section to briefly outline how you came to these conclusions. Did you use data from Ovum tools and databases? Was there a survey of decision makers, vendors, or end users across a number of geographies? Was the research based on interactions with specific groups? Did you exploit forecasts or expertise from another part of the Ovum business?

Further reading

Fundamentals of a web experience management, , July 2018

2018 Trends to Watch: Enterprise Content Management, IT0014-003351 (October 2017)

"Title of opinion or research note in quotation marks," Product code (Month YYYY)

Author

Sue Clarke, Senior Analyst, Data and Enterprise Intelligence

sue.clarke@ovum.com

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askananalyst@ovum.com

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