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The Forrester Wave™: Web Content Management For External Sites, Q2 2009

by Stephen Powers and Tim Walters, Ph.D.
for Information & Knowledge Management Professionals

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SDL Tridion, Interwoven, And FatWire Lead, While Microsoft Makes Inroads

by **Stephen Powers and Tim Walters, Ph.D.**

with Matthew Brown, Peter Schmidt, and Keith K. Tsang

EXECUTIVE SUMMARY

Forrester evaluated 10 leading Web content management (WCM) vendors across approximately 115 criteria and found that SDL Tridion continues its leadership in enabling organizations to deliver persuasive customer experiences on publicly facing Web sites. SDL Tridion and fellow Leaders Interwoven and FatWire provide business-user-oriented tools that enable not only the management of content, but targeted delivery, analysis, and optimization of content consumption as well. Strong Performers Open Text and Oracle provide solid WCM solutions that nicely complement (and integrate with) other products in their respective enterprise content management (ECM) suites. Strong Performers Vignette and Day Software offer functionality mostly on par with the Leaders, but fall short in strategy relative to the Leaders. Microsoft ekes in to the Strong Performer category with enhanced WCM functionality in SharePoint. Contenders include IBM, whose basic WCM integrates with its WebSphere Portal, and EMC, which is pursuing a unified content strategy.

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Forrester conducted evaluations in February 2009 and interviewed 10 vendor companies, including Day Software, EMC, FatWire, IBM, Interwoven, Microsoft, Open Text, Oracle, SDL Tridion, and Vignette. Forrester also interviewed 30 user companies who use one or more of these vendors' products.

Related Research Documents

["Web Content Management Investment Continues Despite The Challenging Economic Climate"](#)

January 12, 2009

["To Succeed With Web Content Personalization, Start Failing Now"](#)

November 7, 2008

["The Persuasive Content Architecture"](#)

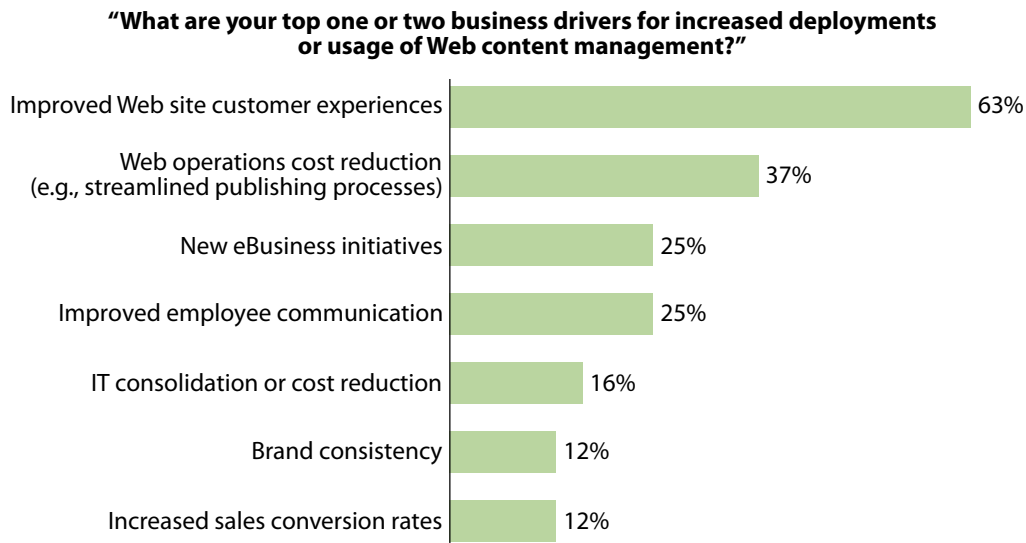
July 2, 2008

WCM EVOLVES INTO A KEY COMPONENT OF A PERSUASIVE CONTENT ARCHITECTURE

Web content management (WCM) has come of age. Enterprises continue to invest in WCM projects, but they no longer use it to merely store content and publish online. Instead, they want to accomplish specific business goals, such as increased sales conversion rates and improved customer service (see Figure 1).¹ WCM has evolved to become part of a persuasive content architecture that enables organizations to leverage content residing in different systems and target it on the Web and in other channels, such as mobile and print.² Testing and analytics figure into persuasive WCM as well — enterprises require tools to report how audiences and various segments consume content. Site managers can now view content usage in line with site management and authoring tools and adjust content accordingly.

Some of this extended functionality exists natively in WCM products. Yet increasingly, vendors offer integration with their own or third-party tools devoted specifically to analytics and reporting, A/B and multivariate testing, eCommerce, customer relationship management (CRM), and other components of enterprise content management (ECM), such as document output for customer communications management and digital asset management (DAM). These other systems and applications need to work together with WCM so, for example, content authors can convert and publish documents from a document repository, use customer information from a CRM to serve targeted content, and transform rich media from a DAM repository in the Web channel (see Figure 2).

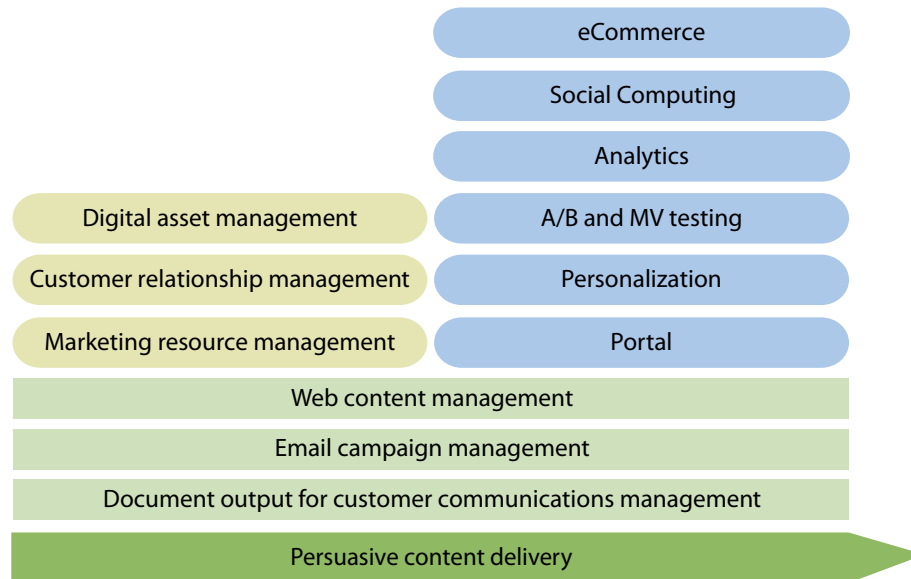
Figure 1 Customer Experience Drives Web Content Management Initiatives



Base: 187 IT and business decision-makers who responded that they plan to increase WCM deployments or usage in the next 12 months (multiple responses accepted)

Source: October 2008 North America, Europe, And Asia Pacific Web Content Management Online Survey

Figure 2 Extended Persuasive Content Ecosystem



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Source: Forrester Research, Inc.

Business-User-Friendly Tools Serve As A Foundation For Increased Productivity

As core WCM functionality grows commoditized among top vendors, WCM tool sets and user interfaces have become differentiators. Leading WCM vendors have moved away from tools featuring pop-up windows and frequent browser page refreshes. Instead, they offer interfaces powered by rich Internet applications (RIA), which enable drag-and-drop administrative and design functionality, fewer refreshes, and ultimately fewer clicks to publish content. These more intuitive UIs can also translate to less upfront training for content contributors, especially those infrequent contributors who don't author enough content to ever become truly fluent on less intuitive tools.³ When evaluating WCM products for productivity, information and knowledge management (I&KM) pros should consider:

- **In-line and in-context editing to enable management of content in context.** In-line editing does not require any kind of pop-up or refresh; authors can go to a Web page and edit content directly in the page. In-context editing allows users to find content within the context of a Web page but then edit the content in another window. The difference between in-context and true in-line editing proves to be a key productivity differentiator for some organizations.
- **Integration of desktop authoring tools for infrequent users who need familiar tool sets.** For those content contributors who don't want to learn the vendor's proprietary tool sets, using a desktop tool such as Microsoft Word eases training and user adoption issues. Basic integration enables content authors to check in, check out, and publish content from within the Microsoft

Word ribbon. Advanced functionality — such as that offered by SDL Tridion — allows content authors to add and modify metadata from within a Word template with the appropriate fields for the given content type.

- **Easy-to-design workflows to enforce disciplined publishing processes.** I&KM professionals in a recent survey indicated that they need to improve their workflow capabilities and processes for Web content.⁴ In some verticals, publishing to the Web channel has become a more disciplined process, either to enforce brand consistency or to meet regulatory compliance. Superior workflow functionality includes graphical user tools enabling business users — not IT — to design workflows, support escalation, and enter workflow tasks in email applications such as Microsoft Outlook.
- **Globalization and localization management for multiple country and/or brand sites.** Globalization processes — especially in US enterprises — remain largely manual. Many companies now recognize, however, that they must provide Web content in more than one language. They find that manual processes consume more resources, reduce time-to-market, and promote inconsistency. WCM vendors with distinctive functionality in this area offer graphical, business-user-oriented design interfaces, enabling site managers to create localization schemes that let local managers inherit and override content and link into third-party systems for automated translations.⁵

Integration With Other Persuasive Content Components Becomes Critical

A third of respondents to our recent WCM survey listed integration with other enterprise applications or content repositories as the leading area requiring improvement in existing WCM solutions.⁶ Enterprises need better integration to support persuasive Web sites because:

- **Audience targeting is essential, as one-size Web sites no longer fit all.** While some WCM vendors have offered targeting capabilities for years, buyers often shelved that functionality after the purchase due to other priorities and overhead involved in personalization. Managing complicated personalization rules, for example, proved difficult and time-consuming. But this WCM feature set has matured, with vendors offering out-of-the-box functionality for algorithm-based recommendations, in addition to more sophisticated ways of managing segments or importing information from CRM systems.⁷
- **Analytics, testing, and optimization trump blind hunches about customer experience.** Though some WCM vendors have offered limited analytics capabilities, marketing departments have been reluctant to give up third-party packages such as WebTrends and Omniture. While leading WCM vendors continue to offer some native analytics functionality, they have also increased focus on third-party analytics integration. Some now enable content contributors to easily place tags within content produced by the WCM and to view analytical data from the third-party package within the context of the authoring environment. This benefits editors who can modify pages while accessing usage information.

- **Rich media capabilities lend sizzle.** As more Web sites incorporate audio, video, and RIAs such as Flash and Silverlight, enterprises need to manage these content types within WCM. WCM vendors have begun offering more native rich media management capabilities, as well as the ability to pull rich media content from DAM systems. RIA management remains primitive, but some WCM products treat RIAs as distinct content types that authors can “marry” to text-based content. This enables business users to “edit” the RIAs in context, just as they now edit text.
- **Portal integration enables managed content in self-service sites.** As more self-service shifts from print and call centers to the Web, enterprises have turned to portals to manage and enhance those experiences. Content management has traditionally been weak or nonexistent in portal products, so vendors with distinctive functionality in this area offer tight integration or recommended integration frameworks with leading portals, such as IBM WebSphere and SAP NetWeaver.
- **Social Computing engages Web site visitors with interactive experiences.** While third-party Social Computing tools abound, some organizations have benefitted from managing user-generated content (UGC) within WCM systems. This enables them to treat UGC as any other content, applying workflow, adding metadata, and reusing it on other sites or in other channels.
- **Multichannel features lend consistency to customer interactions.** Enterprises have tired of recreating the same content for different channels — such as mobile and print — due to resource constraints as well as consistency issues. The ability to leverage Web content and transform it to other channels — such as mobile, email, or even to high-volume output management solutions — is increasingly an important feature.

EXPERIENCED VENDORS TACKLE CONTENT MANAGEMENT AND CONTENT ENGAGEMENT

In this evaluation, Forrester examined vendors that can enable marketers, eBusiness teams, and operations teams to manage content, target it to segments of Web site visitors, deliver to other channels, and optimize based on content consumption. Forrester included 10 vendors in this assessment: Day Software, EMC, FatWire, IBM, Interwoven, Microsoft, Open Text, Oracle, SDL Tridion, and Vignette. We selected vendors that have (see Figure 3):

- **A minimum of approximately \$25 million in annual revenues.** Vendors included in this evaluation have a proven WCM product and generate approximately \$25 million or more in annual revenue.
- **Significant experience and demonstrable success in enterprise-class organizations.** The WCM marketplace includes vendors focusing on enterprise-class organizations (which have more than 1,000 employees); vendors targeting small and medium-sized businesses (SMBs); vendors targeting the public sector only; and vendors attempting to be all things to all markets. Forrester selected vendors that target enterprise-class organizations and have demonstrable success with 100 or more customers in this market segment.

After examining past research, user-need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria (see Figure 4). We evaluated vendors against approximately 115 criteria, which we grouped into three high-level categories:

- **Current offering.** To assess product strength, we evaluated each offering against four groups of criteria: 1) content management administration; 2) content publishing configuration and administration; 3) multisite/channel management capabilities; and 4) product architecture.
- **Strategy.** We reviewed each vendor’s strategy, evaluating how well each vendor’s planned enhancements will position it to support current and evolving persuasive content requirements, and whether or not the vendor has a path to delivery of those enhancements given its current technology, internal resources, and partnerships.
- **Market presence.** To determine a vendor’s market presence, we evaluated each vendor’s installed base, company financials, professional services, global presence, and license and reseller partners.

Figure 3 Evaluated Vendors: Product Information And Selected Criteria

Vendor	Product and version evaluated	Version release date*
Day Software	Day CQ WCM 5.1	November 2008
EMC	EMC Documentum 6.5 SP1	December 2008
FatWire	FatWire Content Server 7.5	December 2008
IBM	IBM Lotus Web Content Management 6.1	June 2008
Interwoven	Interwoven TeamSite 6.7.2 SP1	March 2008
Microsoft	Microsoft Office SharePoint Server 2007	January 2007
Open Text	Open Text Web Solutions 9	December 2008
Oracle	Oracle Universal Content Management 10gR3	May 2007
SDL Tridion	SDL Tridion 5.3 SP1	December 2008
Vignette	Vignette Content Management 7.6	December 2008

Included vendors must:

Have a proven WCM product and generate approximately \$25 million or more in annual revenue.

Have significant experience and demonstrable success in enterprise-class organizations. The WCM marketplace includes vendors focusing on enterprise-class organizations (which have more than 1,000 employees); vendors targeting small and medium-sized businesses (SMBs); vendors targeting the public sector only; and vendors attempting to be all things to all markets. Forrester selected vendors that target enterprise-class organizations and have demonstrable success with 100 or more customers in this market segment.

*All evaluated versions were generally available before January 1, 2009.

Figure 4 Evaluation Criteria

CURRENT OFFERING	
Content management administration	How extensive are the product's content administration and management capabilities?
Content publishing config and admin	How does the product support content publishing and delivery configuration and administration?
Multisite/channel management capabilities	How does the product provide multisite and/or channel management capabilities?
Product architecture	How well does the product fit in IT environments?
STRATEGY	
Product direction	What is the vendor's technology and differentiation strategy for its Web content management solution?
Financial resources to support strategy	Is the vendor profitable? If so, for how long has it been profitable? What is the vendor's cash flow? Does the company have sufficient revenues, profits, and cash flow to support its strategies?
Development team	How many developers are working on the WCM product?
Cost	What is the cost of this product?
MARKET PRESENCE	
Installed base	How large is the vendor's installed base of customers for this product and for all products?
Company financials	How strong are the company's financials?
Services	How strong are the vendor's implementation and training services?
Global presence	What is the vendor's commitment to global customers? Specifically, what is the vendor's commitment to North America, South America, EMEA, and Asia Pacific?
License partners and resellers	How many companies license or resell this product?

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Source: Forrester Research, Inc.

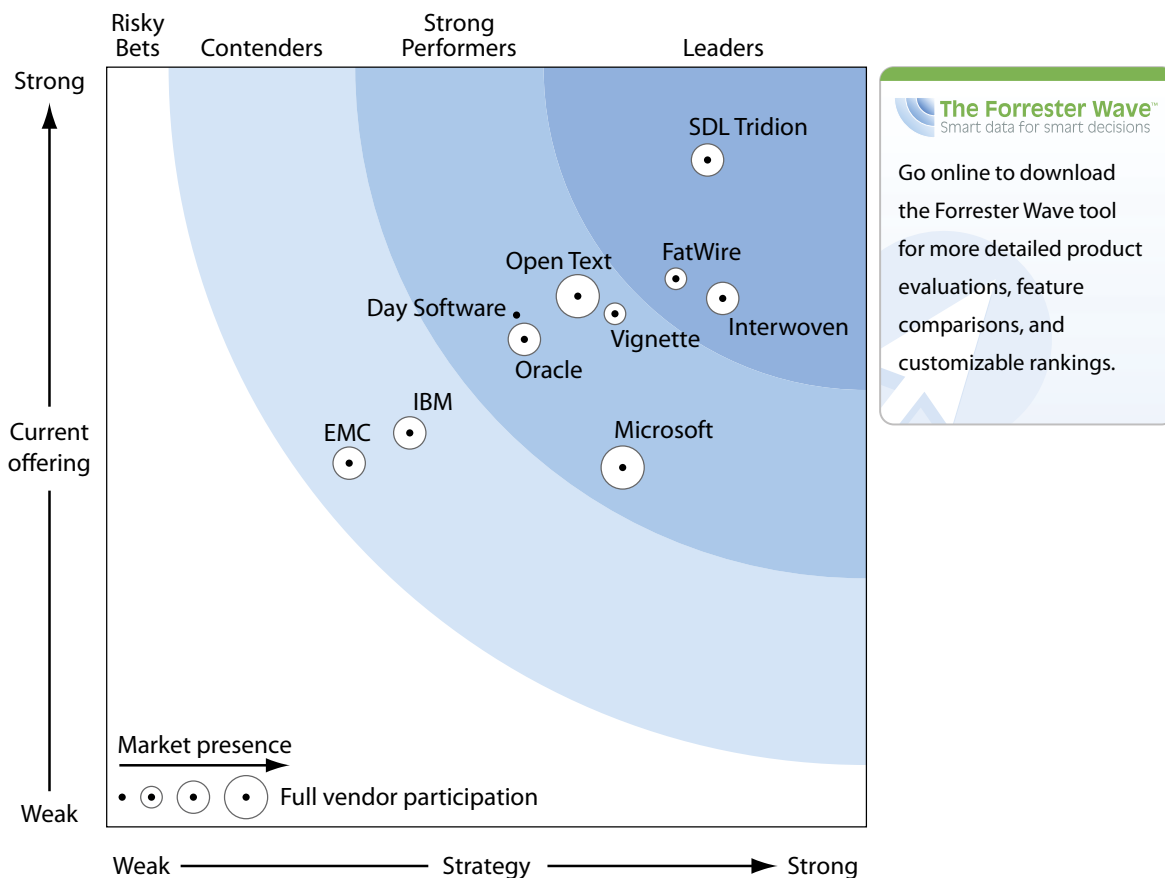
THE RESULTS: SDL TRIDION OUT ON TOP, WITH INTERWOVEN AND FATWIRE CLOSE BEHIND

Our results showed that (see Figure 5):

- **SDL Tridion, Interwoven, and FatWire lead with a rich array of WCM components.** These three vendors remain on the forefront of the persuasive content experience, offering strong functionality in the areas of content targeting, multisite management, rich media capabilities, and Social Computing. In addition, all three vendors focus on enabling business users and marketers — rather than IT staff — to manage content and administer Web sites via graphical user interfaces and intuitive tool sets.

- **Vignette and Day have functionality similar to the Leaders, but execution remains a question.** WCM pioneer Vignette still has strong technology, but its past lack of focus and continued hangover from a rough technical upgrade has disillusioned some of its longtime customers. Day has made fewer mistakes along the way, but until recently, it has not made nearly the same effort with WCM as has Vignette; lesser effort means fewer mistakes. Day's new CQ5 product represents a significant leap for the vendor, especially in the area of usability. Now marketing and market momentum remain the vendor's biggest challenge.
- **Open Text and Oracle offer strong WCM functionality within diverse ECM offerings.** Though it doesn't quite offer the same level of persuasive functionality as the Leaders in this evaluation, Open Text has a strong WCM offering and has made an increasing effort to integrate with its other ECM products, such as document output for customer communications management and digital asset management. Oracle, in the meantime, also has a solid WCM offering, one that it plans to continue to integrate with its other offerings, such as Siebel.

Figure 5 Forrester Wave™: Web Content Management For External Sites, Q2 '09



Source: Forrester Research, Inc.

Figure 5 Forrester Wave™: Web Content Management For External Sites, Q2 '09 (Cont.)

	Forrester's Weighting	Day Software	EMC	FatWire	IBM	Interwoven
CURRENT OFFERING	50%	3.37	2.39	3.61	2.59	3.48
Content management admin	35%	3.39	2.54	2.96	1.70	3.08
Content publishing config and admin	20%	2.52	1.28	3.34	2.68	3.12
Multisite/channel management capabilities	35%	3.76	2.29	4.03	2.92	3.74
Product architecture	10%	3.65	4.40	5.00	4.40	4.70
STRATEGY	50%	2.70	1.60	3.75	2.00	4.05
Product direction	100%	2.70	1.60	3.75	2.00	4.05
Financial resources to support strategy	0%	0.00	0.00	0.00	0.00	0.00
Development team	0%	0.00	0.00	0.00	0.00	0.00
Cost	0%	0.00	0.00	0.00	0.00	0.00
MARKET PRESENCE	0%	1.82	3.41	2.86	3.94	3.84
Installed base	45%	1.70	2.10	2.50	3.20	4.20
Company financials	25%	1.00	4.25	2.75	4.00	3.00
Services	10%	2.00	4.00	4.00	5.00	4.00
Global presence	10%	3.00	4.00	1.50	5.00	5.00
License partners and resellers	10%	3.00	5.00	5.00	5.00	3.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Source: Forrester Research, Inc.

Figure 5 Forrester Wave™: Web Content Management For External Sites, Q2 '09 (Cont.)

	Forrester's Weighting	Microsoft	Open Text	Oracle	SDL Tridion	Vignette
CURRENT OFFERING	50%	2.36	3.49	3.21	4.39	3.38
Content management admin	35%	2.30	3.36	2.95	4.55	3.00
Content publishing config and admin	20%	1.89	3.14	2.28	4.18	2.88
Multisite/channel management capabilities	35%	2.50	3.47	3.50	4.18	3.68
Product architecture	10%	3.00	4.70	5.00	5.00	4.70
STRATEGY	50%	3.40	3.10	2.75	3.95	3.35
Product direction	100%	3.40	3.10	2.75	3.95	3.35
Financial resources to support strategy	0%	0.00	0.00	0.00	0.00	0.00
Development team	0%	0.00	0.00	0.00	0.00	0.00
Cost	0%	0.00	0.00	0.00	0.00	0.00
MARKET PRESENCE	0%	4.57	4.14	3.40	3.84	2.61
Installed base	45%	4.60	4.20	2.00	3.70	2.30
Company financials	25%	4.00	3.00	4.00	3.50	1.50
Services	10%	5.00	5.00	5.00	4.00	4.00
Global presence	10%	5.00	5.00	5.00	4.00	3.00
License partners and resellers	10%	5.00	5.00	5.00	5.00	5.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Source: Forrester Research, Inc.

- **Microsoft enhances SharePoint's capabilities for public-facing Web sites.** Though Microsoft still doesn't have functionality comparable to its best-of-breed counterparts, SharePoint's viral spread through organizations as a collaboration and ECM tool set has led enterprises to give it a shot for external WCM. Microsoft benefits from users' unhappiness with first-generation WCM implementations from other vendors and the availability of trained development and implementation resources relative to some of the other vendors in this Forrester Wave.⁸
- **IBM targets a portal strategy, while EMC focuses on a unified content strategy.** Use of IBM's WCM product for persuasive sites is driven by organizations' desire to leverage their existing IBM technology platform, rather than by the design or positioning of the product. For its intended purpose — adding value to WebSphere Portal — the WCM product provides solid, yet somewhat basic, functionality. EMC, meanwhile, aims to offer unified capabilities for WCM and the rest of its ECM suite. But the EMC product has limited persuasive functionality when compared to best-of-breed vendors, and it lacks a business-user-friendly tool set.

VENDOR PROFILES

Leaders: SDL Tridion, Interwoven, And FatWire

- **SDL Tridion shows strength in targeting and multichannel support.** Europe-based SDL Tridion has the strongest product of all the WCM vendors evaluated in this Forrester Wave, with a solid set of functionality for persuasive content initiatives, particularly in the areas of content targeting, multisite management, and multilingual site management (augmented by integration with language translation products from parent SDL). More than any other vendor evaluated, SDL Tridion seriously tackles the issue of repurposing Web content in the print channel with its Pitney Bowes relationship. Blueprinting technology — which enables enterprises to manage sites in multiple languages or for multiple brands — stands out from others with its graphical administrative and design interfaces. But customers Forrester has interviewed indicate that this technology can be challenging to implement correctly. Many user interfaces will receive much-needed updates in 2009, but they should go deeper than a shiny new façade on the existing UI. The vendor also must work on its Social Computing strategy. Watch for SDL Tridion to make agency and system integrator partnerships a priority as it continues its reach into the North American market and takes on Interwoven, FatWire, and Vignette.
- **Interwoven maintains its marketing pace, but questions remain about Autonomy.** Interwoven has continued its focus on supporting marketing-centric Web sites. Witness its acquisition of site optimization vendor Optimost, the introduction of targeting and segmentation tools, and improvements to the dynamic delivery capabilities of LiveSite. Leading interactive agencies continue to favor Interwoven, despite the fact that the product's core architecture is not the lightest or most flexible. But will new owner Autonomy maintain the focus on persuasive content support? Autonomy has promised allegiance to Interwoven's product development road map, which includes the architectural rationalization — including consistent UIs — of all its acquired products. Pending enhancements remain on schedule. Autonomy's IDOL (Intelligent Data Operating Layer) technology could in fact enrich and extend Interwoven's support for marketers and marketing-centric sites. Prospects and customers can be confident of the solution's strengths while remaining vigilant about Autonomy's stewardship.
- **FatWire enhances its position with community and collaboration functionality.** FatWire has augmented its persuasive support — including existing personalization and analytics capabilities — with the release of modules for community and collaboration, content integration, and delivery to mobile devices. FatWire is the smallest vendor to rank as a Leader in this Forrester Wave, and size could matter on the product development front: The last major release of the core WCM product was two years ago, and the next is pending, but not forthcoming.⁹ The personalization and analytics modules require updating to keep up with new capabilities from vendors such as Interwoven and Vignette. In addition, FatWire will need to provide integrations for leading analytics, campaign management, and site optimization solutions. FatWire does have a strong vision for supporting the next phase of the consumer-centric Web, but its challenge will be to harness the resources (through organic growth or M&A) to deliver on that vision.

Strong Performers: Vignette, Open Text, Day Software, Oracle, And Microsoft

- **Vignette boasts strong technology but needs to prove itself again.** Vignette refreshed its technology platform several years ago, strengthening an already solid offering. The vendor continues to demonstrate its commitment to persuasive support in the areas of rich media management and, particularly, recommendations. Its OEM of the Baynote recommendation engine offers exciting possibilities for targeted content that currently only SDL Tridion can match. Vignette has also refreshed its content authoring tool sets, which have markedly improved since the last Forrester Wave evaluation (though less than those from Day Software). Vignette's product suite remains a high-end solution best-suited for companies that have large-scale needs. The company is paying the price for a long period of troubled upgrades, spotty customer service, and flavor-of-the-week market strategies, as license revenues have been dramatically low recently. Still, Vignette shows signs of regaining its focus. In addition to the Baynote OEM, 2008 saw the acquisition of Vidavee for high-volume video support. Vignette has surrendered all ECM ambitions and embraced a consistent online customer life-cycle marketing message that reflects the dynamics of the consumer-centric Web. In short, the product suite and the company strategy are now strong, but Vignette must prove it can execute properly and regain the confidence of the market.
- **Open Text stands out from other ECM and platform vendors.** While Open Text does not have quite the same level of functionality as some of the Leaders in this evaluation, the company boasts a solid WCM that ranks ahead of any WCM offered by the other platform or ECM vendors. Open Text's strength lies in its ability to leverage integrations with other ECM offerings (records management, document output for customer communications management, and digital asset management). Unlike other vendors, it has already started to deliver in this area. Furthermore, the vendor has announced plans to invest \$1 billion in R&D for its ECM product suite over the next five years. Open Text's partnership with SAP has also proven strong, with customers using SAP's portal and Open Text's WCM in tandem. Other investments lie in the area of Social Computing, increased support for mobile devices, and collaborative tools to deliver on its promise of "content from anywhere, anytime." Its multilingual content management is second only to SDL Tridion's — it just needs a bit more graphical support. The vendor needs to upgrade its user interfaces to reclaim its legendary usability crown (it has a new UI scheduled for release in June 2009), but it remains well positioned to attract customers who want integrated ECM components from a single vendor.
- **Day continues to innovate with technology but needs to make more marketing noise.** In some circles, Day Software remains well known — but more as a driver behind technology standards such as JSR 170 rather than as a WCM vendor. However, Day has quietly created a clever WCM solution that efficiently extracts the maximum value to the enterprise out of those standards. Day's new Flash-enabled user interface proves both attractive and slick. Below the surface, it has enriched core functionality such as support for video and images, personalization, and communities. Day does not currently provide A/B and multivariate testing, but plans to do so for release in 2009. Surprisingly, for a European-based vendor, the product has strong but not

exemplary tools for multilingual content management. Ultimately, Day has created a powerful tool for marketing-driven sites, but from an authoring and administrative standpoint, the product lacks that extra layer of abstraction that would make it really attractive to the casual business user.

- **Oracle's UCM provides solid WCM capabilities within its ECM suite.** Oracle acquired Stellent's WCM capabilities several years ago, but it is not quite in the same league with the WCM capabilities offered by some best-of-breed vendors in this report. Oracle Universal Content Management excels at content management administration capabilities — including *very* granular access control and the ability to treat bundles of content as single entities. Like Open Text, Oracle has a strong WCM product relative to the other ECM vendors and provides a realistic option for organizations wanting an ECM solution with a viable WCM component. Given the product road map, Oracle may be satisfied (and do a very good business) by selling into its installed base rather than competing with best-of-breed vendors for standalone opportunities. The road map focuses more on beefing up integrations with other Oracle products than on advancing persuasive content functionality such as multilingual content and rich media management, though potential integration with Real Time Decisions could offer significant targeting benefits. This road map makes sense for Oracle and for I&KM pros looking for integration with Oracle products such as Siebel, WebCenter Suite, and WebLogic Portal.
- **Microsoft beefs up SharePoint's WCM functionality.** Though it does not offer functionality comparable to other Strong Performers in this evaluation, Microsoft eked into the category on the strength and momentum of SharePoint. As SharePoint continues to virally spread throughout enterprises, companies increasingly ask themselves whether SharePoint — which has been successful for intranet sites — can meet the needs of externally facing Web sites, as well. Many seem willing to take the risk; one manager at an interactive agency told us, “We’re doing a ton of these [SharePoint implementations].” SharePoint's WCM functionality does not truly stand out from other vendors in any specific area, and its weaknesses include site targeting, multilingual capabilities, and integration with other enterprise applications. But available resources prove an advantage for Microsoft, as the huge number of developers with some .NET experience can transition to SharePoint, and the enormous number of SharePoint implementations makes the skill set desirable. The familiar SharePoint interface also benefits organizations by easing adoption issues, traditionally a problem with WCM. SharePoint will add more persuasive and Social Computing functionality in a slow-but-steady fashion. Organizations looking for true persuasive content support will either need to resign themselves to doing extra customization and integration, or they should look elsewhere.

Contenders: IBM And EMC

- **IBM's WCM adds value via a deep integration with WebSphere Portal.** IBM's Web content management product struggles to compete with the leading solutions for persuasive content support, but IBM doesn't really intend the product to do so. Instead, the product exists to add value to WebSphere Portal, with which it considerably extends its base functionality. For example, side-by-side comparison of source and variant content for multilingual sites

remain absent in the WCM product but exist within the portal. As a tool within the IBM arsenal, the WCM solution fails in some predictable areas (Microsoft SharePoint integration), disappoints in some others (such as workflow support), and surprises in a few instances (with solid personalization functionality). While organizations that look for a portal with WCM support should consider the IBM tandem, those looking for persuasive content support should understand the shortcomings of this solution.

- **EMC invests in WCM, but the payoff will be in ECM.** EMC has made investments in the WCM product line over the past 18 months, and is leveraging its X-Hive and Document Sciences acquisitions. Its stated strategy for customer experience support, and alliances with marketing suite vendors such as Unica and Aprimo, indicate that the vendor appreciates that the consumer-centric Web has fundamentally transformed the requirements for WCM solutions. However, business user tools lag well behind the in-context editing and templating capabilities of the leading solutions, as does support for segmentation, targeting, and social computing. EMC aims to offer unified capabilities for WCM, BPM, records management, document output for customer communications management, and DAM, and this could entice customers looking for a single, enterprisewide, cross-channel content storage and delivery solution. As a WCM point solution, however, EMC's current offering has significant shortcomings when compared to the Leaders in this report.

SUPPLEMENTAL MATERIAL

Online Resource

The online version of Figure 5 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution:

- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.
- **Product demos.** We asked each vendor to conduct demonstrations of its product's functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with three of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of questionnaires, demos, and discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve.

ENDNOTES

- ¹ In October 2008, Forrester surveyed 261 information and knowledge management (I&KM) professionals with Web content management (WCM) decision-making or influencer roles about their WCM strategies and priorities for the coming year. Seventy-two percent of respondents indicated that they plan to continue to invest in WCM initiatives, with an emphasis on customer experience support. See the January 12, 2009, "[Web Content Management Investment Continues Despite The Challenging Economic Climate](#)" report.
- ² Customer experience expectations rise each year, and marketers now find themselves under pressure to better manage content associated with their outbound and inbound customer interactions. Enterprise content management (ECM) systems remain largely disconnected from the marketing technologies and services used to support marketing's needs — IT does not always understand marketing's context and goals. Enterprises need to view ECM in the overall marketing context and consider an integrated persuasive content architecture framework to bridge the contextual and semantic gaps. See the July 2, 2008, "[The Persuasive Content Architecture](#)" report.
- ³ Forrester has found that dedicated content resources who manage content on behalf of business people can help expedite publishing processes, as well as enable enforcement governance and standards. See the January 15, 2008, "[Four Roles Needed To Support Persuasive Content Management Initiatives](#)" report.
- ⁴ In October 2008 we surveyed more than 261 IT and business leaders with responsibility for WCM deployments. See the January 12, 2009, "[Web Content Management Investment Continues, Despite The Challenging Economic Climate](#)" report.

- ⁵ Many organizations do not take advantage of the support for multilingual content management available in their WCM solutions. See the February 17, 2009, "[People And Process Still Trump Product For Multilingual Content Management](#)" report.
- ⁶ In October 2008, Forrester surveyed 261 information and knowledge management (I&KM) professionals with Web content management (WCM) decision-making or influencer roles about their WCM strategies and priorities for the coming year. See the January 12, 2009, "[Web Content Management Investment Continues Despite The Challenging Economic Climate](#)" report.
- ⁷ Consumer demand for relevant and engaging Web experiences is forcing companies to personalize the delivery of information and offers. See the November 7, 2008, "[To Succeed With Web Content Personalization, Start Failing Now](#)" report
- ⁸ SharePoint resources are still not abundant, but Microsoft is aggressively addressing the demand with additional training. Also, it is important to recognize that developers with .NET skills will not immediately be competent SharePoint developers. See the October 31, 2008, "[To SharePoint, Or Not, For External Web Site Initiatives](#)" report.
- ⁹ In our October 2008 survey of Web content management end users, 57% said that they would like to see WCM vendors release major upgrades once a year. See the January 12, 2009, "[Web Content Management Investment Continues Despite The Challenging Economic Climate](#)" report.

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