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The Forrester Wave™: Digital Asset Management For Customer Experience, Q2 2012

by Stephen Powers and Anjali Yakkundi, May 9, 2012

KEY TAKEAWAYS

“Digital Asset Management” Causes Confusion In An Evolving Market

Forrester defines a digital asset as any item of content that has been formatted into a binary source. In reality, the term does little to describe what DAM solutions actually provide. These solutions now support four distinct use cases: high-end production, marketing operations, corporate audio and video, and line-of-business general purpose.

The Rich Media Management Market: A Lot Of Davids But No Real Goliath

The market is immature and fragmented and has surprisingly few big-name players. Forrester categorizes players in the space into four buckets: enterprise content management (ECM) and customer experience management (CXM) stack players, midmarket players, veteran smaller players, and emerging smaller players.

DAM Moves Out Of Its Siloed Past Into A CXM Future

Organizations look to integrate rich media management solutions with other enterprise applications -- particularly those that deliver online content. And DAM's role in supporting persuasive content makes it an important part of the new set of CXM solutions for engaging customer experiences.

OpenText And Autonomy Lead, With ADAM Software And Adobe Close Behind

Forrester evaluated the strengths and weaknesses of top DAM vendors. OpenText and Autonomy (an HP company) were ranked as Leaders. Strong Performers include ADAM Software, Adobe, North Plains, MediaBeacon, and nonparticipating vendor EMC. Contenders include celum, Canto, Widen Enterprises, and Xinet. Extensis (a Celartem company) was a Risky Bet.

The Forrester Wave™: Digital Asset Management For Customer Experience, Q2 2012

OpenText And Autonomy Lead The Rich Media Management Pack, With ADAM Software And Adobe Close Behind

by [Stephen Powers](#) and [Anjali Yakkundi](#)
with [Dave West](#) and Shannon Coyne

WHY READ THIS REPORT

The digital asset management (DAM) market is fragmented and in flux. With a myriad of vendors offering anything and everything under the name “DAM,” application development and delivery (AD&D) professionals are often confused about which solution to choose. And the evolving customer experience management (CXM) ecosystem means that DAM must integrate with technologies to enable the management and delivery of compelling customer experiences. In Forrester’s 15-criteria evaluation of the DAM market, we identified 12 significant vendors in the space — ADAM Software; Adobe; Autonomy, an HP company; Canto; celum; EMC; Extensis, a Celartem company; MediaBeacon; North Plains; OpenText; Widen Enterprises; and Xinet — and then researched, analyzed, and scored them. This report details our findings on how DAM vendors measure up and plots where they stand in relation to each other in order to help AD&D professionals select the right solution for their rich media management needs.

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Forrester conducted evaluations in Q1 2012 and interviewed 12 vendors and more than 25 user companies.

Related Research Documents

[The Forrester Wave™: Web Content Management For Online Customer Experience, Q3 2011](#)

July 13, 2011

[The Rich Media Management Mystery](#)

April 28, 2011

[Market Overview: Rich Media Management Software](#)

December 21, 2010



“DIGITAL ASSET MANAGEMENT” CAUSES CONFUSION IN AN EVOLVING MARKET

What is a digital asset? Forrester defines a digital asset as any item of content that has been formatted into a binary source. Using this definition, digital assets could include anything and everything: Microsoft Office documents, audio files, HTML pages, videos, etc. In reality, the term “digital asset management” does little to describe what DAM solutions actually provide. The term “digital asset management” is both imprecise and misleading for several other reasons as well:

- **Vendors use the DAM term inconsistently.** Vendors sell multiple different types of product offerings under the DAM name. Depending on who you talk to, DAM can mean anything and everything. Forrester consistently witnesses client confusion as a result. For example, Forrester spoke with a healthcare organization that bought a DAM solution but only used it to store business-oriented text-based documents. Not only did this organization not store any persuasive rich media content, but it had no future plans to store rich media content on the system. And some vendors are just as confused as prospective buyers about the use cases for and meaning of a DAM solution.
- **Historically, DAM has been a production- and print-oriented solution.** DAM has been viewed as somewhat of a niche component of enterprise content management (ECM). Organizations in traditional rich-media-heavy verticals such as publishing, media and entertainment, and advertising have used DAM to support the print channel. As online needs increase, DAM is evolving to support multiple types of rich media content across multiple channels — but the DAM moniker has stuck, creating confusion between more traditionally oriented products and solutions oriented to supporting emerging use cases.

Rich Media Management Solutions Now Support Four Distinct Use Cases

As the DAM term has become muddled, Forrester continually fields questions from confused clients who are simply looking to answer, “What is DAM and how do I begin to look for a solution?” What they are really looking for is software to manage rich media assets. Our definition:

Rich media management software encompasses software that enables the production, management, distribution, and retention of rich media assets such as images, graphics, audio, and video.

In reality, however, clients are confused because rich media management encompasses multiple disparate use cases.¹ For example, an organization looking to support global marketing collateral has different needs than an organization looking to support corporate communications collateral such as training videos. While both organizations need to manage rich media, their differing needs require two very different types of solution. As such, DAM generally supports four high-level use cases (see Figure 1):

- **High-end production.** This use case tends to be aligned with the more-traditional rich media industries such as media, entertainment, and publishing. These use cases require the highest level of functionality (e.g., facial recognition, speech-to-text, and deep integration with creative tools) in order to manage content at each phase of the content life cycle, from creation to management to distribution.
- **Midlevel marketing operations.** Marketing departments need to support an increasing amount of rich media multichannel marketing content throughout the content life cycle. Vendors will sometimes use the term “marketing asset management” for solutions geared toward these use cases, which often require deeper integration with other marketing technologies such as marketing resource management (MRM) or product catalog management. Like high-end production use cases, marketing use cases tend to require higher-end rich media management functionality (e.g., globalization/localization and advanced workflow). Based on client inquiry and consulting, Forrester has seen the greatest growth in this area of the market.
- **Corporate audio and video.** Some firms need rich media management to support internally facing content such as training videos and corporate recordings. These use cases require rich media management solutions with less functionality, as many organizations will use the solution as a repository for finished work and have fewer resources dedicated to maintaining the solution. Software-as-a-service (SaaS) solutions are particularly attractive for this use case.
- **Line-of-business general purpose.** Some organizations require a rich media management system to be a one-size-fits-all solution across departments. They might house brand collateral, online content, and internal content all in the same system, which isn't specifically tailored to any one of those content types. These organizations want a parking lot for all their finished rich media assets and may not need the bells and whistles that higher-cost and functionality-rich solutions provide. Though these use cases may include marketing content, marketers only use a DAM solution as a repository, not a well-integrated platform to manage content throughout the content life cycle.

Few vendors have directly lined up to support only one specific use case; instead, most solutions support multiple use cases, and many vendors offer multiple tiers of solutions to support different user needs.

Figure 1 The Four Digital Asset Management Flavors

	High-end production	Midlevel marketing operations	Corporate audio and video	Line-of-business general purpose
Application type	Platform	Out-of-the-box solution	Out-of-the-box solution	Out-of-the-box solution
Verticals	Media, entertainment, publishing	Retail, marketing departments across verticals	Across verticals	Across verticals
Cost	\$200,000	\$50,000 to \$100,000	Cost varies	Less than \$10,000

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Source: Forrester Research, Inc.

THE RICH MEDIA MANAGEMENT MARKET: A LOT OF DAVIDS BUT NO REAL GOLIATH

Unlike its more mature counterparts, such as ECM or web content management (WCM), the DAM market is immature and fragmented and has surprisingly few big-name players.² Most vendors are small — so small they frequently have revenues well under \$30 million a year — and they focus exclusively on rich media management. The players in the space include:

- ECM and CXM stack players.** Vendors such as Adobe, Autonomy (an HP company), EMC, and OpenText provide broad offerings that go beyond just rich media management. EMC and OpenText offer ECM solutions that support content across the ECM spectrum.³ Adobe and Autonomy focus on CXM solutions that support online customer experiences.⁴ Despite their size advantage over much smaller players, Forrester estimates that even these well-known vendors do not have large shares of the DAM market.
- Midmarket players.** Surprisingly, almost no vendors are classified as midmarket players (in terms of revenue) in the rich media management market. Extensis (a Celartem company) offers a solution geared toward supporting the creative professional. North Plains is an established DAM veteran that has been in the market for the past 18 years, and it continues to sell a DAM solution geared toward the heavy production and marketing operations use cases. With its 2012 acquisition of Xinet, which took place after evaluations were completed, Forrester estimates that North Plains has become the largest pure-play DAM vendor in the market.
- Veteran smaller players.** These vendors tend to be veterans of the DAM space and include Canto, Chuckwalla, MediaBeacon, and Xinet. As a whole, they've begun to slowly expand support beyond traditional use cases. Canto and Chuckwalla both focus on both enterprise and departmental deployments. Chuckwalla's strength is in its support for the line-of-business use case, and it has a strong track record in the book publishing industry. MediaBeacon and Xinet have both expanded into supporting marketing use cases along with the more traditional production-oriented use cases.

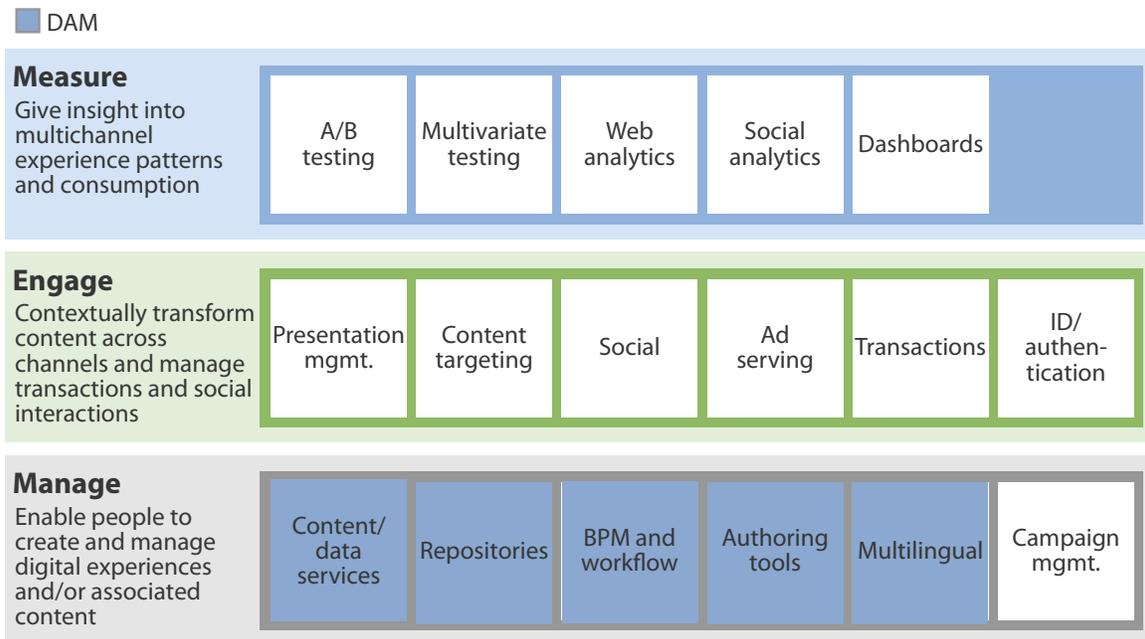
- **Emerging smaller players.** These vendors — most founded in 2000 or beyond — are emerging as viable competitors to the stack and legacy players as many of these vendors continue to pull in impressive, global organizations as clients. Vendors in this space include, but are not limited to, ADAM Software, celum, Nuxeo, webDAM, and Widen Enterprises. European vendors ADAM Software and celum focus on supporting marketing collateral. WebDAM, a cloud solution founded in 2005, has found considerable success with the higher education market and is now eyeing an expansion into other verticals. WebDAM's recently announced partnership with Box will help expand its scope and visibility. Open source vendor Nuxeo is currently building out its rich media management solution as a key component of its ECM suite offering. Widen Enterprises, a SaaS vendor, has recently experienced considerable growth, particularly in the manufacturing vertical.

DAM MOVES OUT OF ITS SILOED PAST INTO A CXM FUTURE

Clearly, DAM is undergoing many changes both in the vendor landscape and in the way it's used. Forrester increasingly speaks with organizations looking to integrate DAM with other enterprise applications — particularly delivery solutions. Breaking away from its past, DAM is no longer viewed as a siloed solution; its role in supporting persuasive content makes it an important part of the new set of CXM solutions (see Figure 2). The CXM solution set is emerging from the components of multiple technologies in order to better support the creation and management of rich, interactive, multichannel experiences. Forrester defines CXM as:

A set of solutions that enable the management and delivery of dynamic, targeted, consistent content, offers, products, and service interactions across digitally enabled consumer touchpoints.

DAM is a process-based solution that enables business users to create rich and engaging experiences by helping them create and manage unstructured rich media content, a key component in managing customer experiences.⁵

Figure 2 Rich Media Management's Role In Customer Experience Management

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Source: Forrester Research, Inc.

DAM FOR CUSTOMER EXPERIENCE EVALUATION OVERVIEW

To assess the state of the DAM market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top DAM vendors.

Evaluation Criteria: Current Offering, Strategy, And Market Presence

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 15 criteria, which we grouped into three high-level buckets:

- **Current offering.** We focused on DAM tool breadth and extended capabilities for managing content. The capabilities evaluated include: workflow, approval, and business process support; search and metadata support; taxonomy; globalization and localization support; security; reporting tools; video and audio support; integration capabilities; distribution, digital rights management (DRM), and rendition management; and internal and external collaboration.
- **Strategy.** We reviewed each vendor's strategy, evaluating its strategic vision and planned enhancements. In particular, we gauged how well evaluated vendors positioned themselves in a fragmented marketplace and how they plan to align themselves within the growing CXM and marketing requirements.

- **Market presence.** To determine a vendor's market presence, we took into consideration each vendor's installed base, company financials, professional services, global presence, and license and reseller partners.

Selected Vendors Have Strong Enterprise Track Records And Market Leadership

Forrester included 12 vendors in the assessment: ADAM Software; Adobe; Autonomy, an HP company; Canto; celum; EMC; Extensis, a Celartem company; MediaBeacon; North Plains; OpenText; Widen Enterprises; and Xinet. Each of these vendors met the following inclusion criteria (see Figure 3):

- **Revenue of at least \$5 million.** All included vendors must have total annual revenue of approximately \$5 million. The revenue cutoff was kept low in order to recognize the large number of small players in the emerging rich media management market.
- **Vision and thought leadership.** Included vendors are among a group of thought leaders in the DAM market. Along with providing robust functionality, included vendors demonstrate vision on how DAM will evolve into the future. While the included vendors may continue to support the traditional rich-media-heavy industries (e.g., media and publishing), they are also delving into new opportunities where rich media management supports the CXM ecosystem.
- **Enterprise interest and track record.** Enterprise customers — defined as those with more than \$500 million annually in revenue — frequently deploy the products offered by the included vendors, whether through enterprisewide deployments and/or department-level deployments.
- **Forrester client interest.** Forrester clients express interest in learning more about the evaluated vendors, frequently asking about the evaluated vendors within the context of inquiry, advisory, and/or consulting.

Figure 3 Evaluated Vendors: Product Information And Selection Criteria

Official company name	Product evaluated	Product version evaluated	Version release date
ADAM Software	ADAM	4.6	June 2011
Adobe	Adobe CQ5 DAM	5.4	March 2011
Autonomy, an HP company	Virage MediaBin	8	January 2012
Canto	Canto Cumulus	8.5.2	November 2011
celum	celum Imagine	4.9	January 2011
EMC	Digital Asset Manager	6.5	December 2011
Extensis, a Celartem company	Portfolio Server	10	July 2011
MediaBeacon	R3volution	3.5	April 2010
North Plains	TeleScope	9.01	January 2012
OpenText	OpenText Media Management	7	April 2010
Widen Enterprises	Widen Media Collective	6.0	January 2012
Xinet	Xinet WebNative Suite	17	December 2012

Vendor selection criteria

Revenue of at least \$5M. All included vendors must have total annual revenue of approximately \$5M. The revenue cutoff was kept low in order to recognize the large number of small players in the emerging rich media management market.

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Source: Forrester Research, Inc.

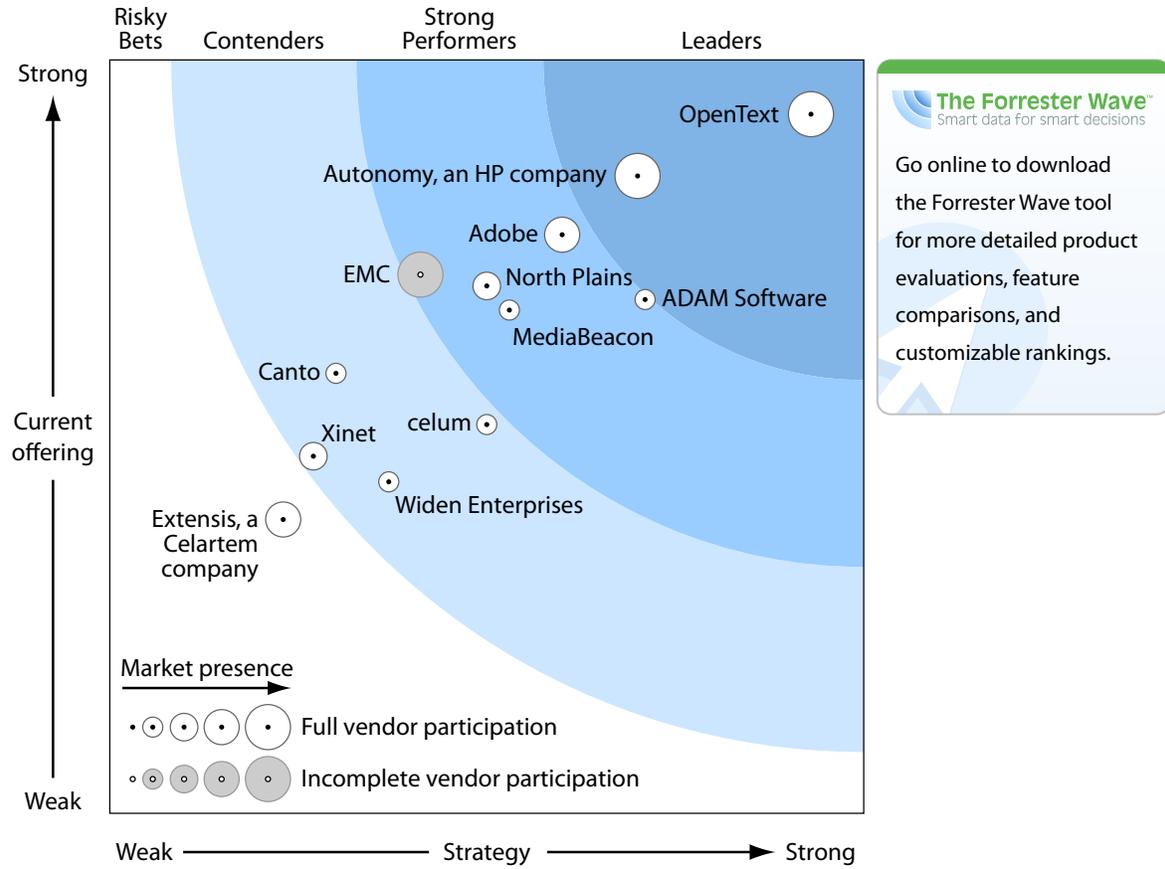
THE RESULTS: OPENTEXT AND AUTONOMY LEAD AN IMMATURE MARKET

The evaluation uncovered a market in which (see Figure 4):

- **OpenText and Autonomy lead the pack with strong, enterprise-class solutions.** OpenText and Autonomy offer the most complete, cutting-edge DAM solutions. Autonomy offers impressive, differentiating functionality for time-based assets, while OpenText has across-the-board best-of-breed functionality. Both vendors have some complementary CXM offerings as well as a solid vision for DAM's role in relation to other CXM solutions. Both vendors must continue to develop their CXM strategies; otherwise, they face the risk of being overshadowed by the up-and-coming Strong Performers.
- **ADAM Software, Adobe, North Plains, MediaBeacon, and EMC offer competitive options.** ADAM Software and Adobe both offer comprehensive CXM visions. Adobe owns multiple CXM components and has a compelling digital marketing strategy, giving it perhaps the highest CXM potential of any evaluated vendor. However, it has yet to move the CQ DAM product out from CQ WCM's shadow. ADAM Software offers a flexible platform solution but must continue to improve its partner network and build an enterprise track record in North America. MediaBeacon, North Plains, and nonparticipating vendor EMC all have solid functionality but share the same problem: lack of a comprehensive, leading CXM vision.
- **Contenders celum, Canto, Widen Enterprises, and Xinet tackle the midmarket.** Canto, celum, Widen Enterprises, and Xinet all offer comprehensive solutions that work best as department-level deployments. Canto's functionality is broad, but it has yet to show outstanding functionality or strategy in any one area. Celum offers a compelling strategy geared toward supporting the CXM solution set, but its functionality and enterprise track record haven't yet lived up to its strategic vision. Widen Enterprises and Xinet both offer promising solutions in their respective niches (advertising and manufacturing, respectively) but must continue to work to build functionality in order to appeal across verticals.
- **Risky Bet Extensis supports creative professionals but lacks depth and breadth.** Extensis' offering works best as a solution for creative professionals with a passionate customer base. However, while it has satisfied customers, Extensis' solution still lacks the general depth and breadth in functionality as well as the strategic execution that the other vendors have developed. Extensis must improve its strategic direction and functionality in upcoming releases in order to compete with the Contenders.

Given the fragmented nature of this market, this evaluation of the DAM market is intended to be a starting point only. We encourage readers to view detailed product evaluations and adapt the criteria weightings to fit their individual needs through the Forrester Wave™ Excel-based vendor comparison tool. These weightings should be adjusted depending on which DAM use case best matches your own.

Figure 4 Forrester Wave™: Digital Asset Management For Customer Experience, Q2 '12



Source: Forrester Research, Inc.

Figure 4 Forrester Wave™: Digital Asset Management For Customer Experience, Q2 '12 (Cont.)

	Forrester's Weighting	ADAM Software	Adobe	Autonomy, an HP company	Canto	celum	Extensis, a Celartem company	MediaBeacon	North Plains	OpenText	Widen Enterprises	Xinet
CURRENT OFFERING	50%	3.41	3.84	4.23	2.92	2.58	1.95	3.34	3.50	4.64	2.20	2.37
Workflow, approval, and business process support	15%	5.00	5.00	5.00	1.00	2.00	0.00	2.00	4.00	5.00	1.00	2.00
Search and metadata support	17%	2.00	4.00	4.00	4.00	2.00	3.00	5.00	3.00	4.00	2.00	2.00
Taxonomy	6%	3.00	3.00	3.00	3.00	3.00	1.00	3.00	3.00	5.00	3.00	1.00
Globalization and localization support	9%	4.00	5.00	4.00	4.00	4.00	2.00	2.00	4.00	5.00	1.00	2.00
Security	4%	5.00	3.00	5.00	5.00	5.00	5.00	3.00	5.00	5.00	3.00	1.00
Reporting tools	8%	4.00	5.00	5.00	5.00	4.00	4.00	4.00	4.00	5.00	3.00	4.00
Video and audio support	14%	3.00	3.00	5.00	1.00	1.00	1.00	4.00	3.00	4.00	3.00	3.00
Integration	10%	4.00	4.00	4.00	3.00	3.00	2.00	2.00	4.00	5.00	1.00	3.00
Distribution, DRM, and rendition management	5%	4.00	4.00	4.00	3.00	4.00	2.00	3.00	3.00	4.00	4.00	1.00
Internal and external collaboration	12%	2.00	2.00	3.00	3.00	2.00	2.00	4.00	3.00	5.00	3.00	3.00
STRATEGY	50%	3.55	3.00	3.50	1.50	2.50	1.15	2.65	2.50	4.65	1.85	1.35
Product road map and strategic direction	35%	5.00	4.00	4.00	1.00	4.00	1.00	2.00	2.00	4.00	2.00	2.00
Enterprise track record	50%	3.00	2.00	3.00	2.00	1.00	1.00	3.00	3.00	5.00	2.00	1.00
Partner network, professional services, and vendor-provided services	15%	2.00	4.00	4.00	1.00	4.00	2.00	3.00	2.00	5.00	1.00	1.00
MARKET PRESENCE	0%	1.40	3.80	5.00	1.40	1.80	3.60	1.40	2.40	4.60	2.00	2.20
Revenue and vendor's business	60%	1.00	5.00	5.00	1.00	1.00	4.00	1.00	2.00	5.00	2.00	1.00
Customer base and geographic and vertical market penetration	40%	2.00	2.00	5.00	2.00	3.00	3.00	2.00	3.00	4.00	2.00	4.00

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

Source: Forrester Research, Inc.

VENDOR PROFILES

Leaders

- **OpenText boasts impressive functionality and emerging CXM strategy.** Waterloo, Ontario-based OpenText is an ECM vendor with an emerging CXM vision. When it acquired Artesia in 2004, OpenText took one of the leading DAM products off the market. Across the board, OpenText's renamed Media Management product has impressive functionality — particularly its support for collaboration, taxonomy, and search. OpenText needs to continue building on this best-of-breed functionality and develop comprehensive video and search support. Because of its robust functionality and relatively higher cost, OpenText is not for beginners and is best suited for higher-end use cases. Its strategic vision is particularly aided by its growing portfolio of CXM solutions and partnerships, including its WCM product, OpenText Web Experience Management, and a partnership with SAP (offering a DAM integration module for SAP's CRM solution and reselling Media Management through SAP). Strategically, OpenText has begun to expand DAM's role in the CXM solution set by offering both an on-premises solution (the version evaluated for this report) and a lighter-weight SaaS solution in order to address various levels of need. To remain a Leader in the market, OpenText must continue to focus on DAM as part of the CXM ecosystem.
- **Autonomy offers a comprehensive, first-class solution for advanced use cases.** Cambridge, UK-based Autonomy — acquired by HP last year — inherited the Virage MediaBin product when it bought Interwoven in 2009. Autonomy's strategy focuses on key industry mega themes such as multichannel content creation and intelligent search to aid information workers. It offers robust functionality and is best suited for the high-end production use case. Unsurprisingly given Autonomy's position as a search vendor, Virage MediaBin has particularly robust search support. It has also stayed ahead of the video curve, offering some of the most comprehensive functionality for supporting time-based assets. Despite its impressive functionality, buyers should understand that Virage MediaBin is not for beginners — it is an expensive and heavy-footprint solution that customers sometimes have difficulty implementing. Multiple customers have also noted particular difficulty with customer service. In order to remain a Leader in the market, Autonomy must continue to build out a cohesive vision of how DAM supports the CXM ecosystem instead of relying on the Intelligent Data Operating Layer (IDOL) as the primary marketing tool.

Strong Performers

- **ADAM Software offers a comprehensive platform but must grow its partner network.** Ghent, Belgium-based ADAM Software offers a platform to support the marketing operations use case. Although a relatively smaller vendor in the space, ADAM Software is well positioned to support large-scale, multinational deployments within marketing departments and plans to move further into the marketing execution space with a solution to support basic

product catalog management needs. ADAM Software's strategy is a key area of strength; it has a comprehensive, forward-thinking vision to use DAM as a backbone as part of a CXM and marketing execution ecosystem. Stand-out functionality includes workflow support (ADAM Software supports a native business process management suite [BPMS] engine) and globalization and localization support. Key challenges for ADAM Software include increasing functionality for search and audio and video, expanding its partner network with both agencies and other CXM solutions, and building a strong consumer base and reputation outside of Europe.

■ **Adobe offers comprehensive DAM support but must prove itself as a standalone product.**

San Jose, California-based Adobe acquired its CQ DAM product via its 2010 Day Software acquisition. Adobe hopes to move CQ DAM out of CQ WCM's shadow in the coming years, selling the product both in conjunction with WCM and as a standalone solution. CQ5 DAM remains particularly strong because of these tight integrations — the CQ DAM and CQ WCM products are built on the same platform and require just a license key to turn on the DAM product. Adobe's digital marketing story is aided by the fact that it has many of the rich media creation, management, and distribution pieces: the creative tool set (Creative Suite), video publishing (Scene7), and delivery (CQ WCM). These integrations and the complementary product portfolio give Adobe a strong story for supporting the CXM ecosystem. Key challenges for Adobe include improving support for time-based assets within CQ5, collaboration tools, and taxonomy management. Strategically, Adobe must continue to work on improving CQ DAM's track record as more than just a CQ WCM companion.

■ **North Plains boasts impressive functionality but is threatened by a lack of CXM strategy.**

Toronto, Ontario-based North Plains is a legacy DAM vendor that has impressive functionality across the board, particularly in the areas of workflow and audio and video support. North Plains continues to boast high visibility among the Forrester client base and is often cited in competitive situations. Strategically, North Plains targets increased workflow and collaboration support. However, while its functionality is impressive, North Plains has yet to create a comprehensive CXM strategy despite a partnership with MRM vendor Aprimo. North Plains continues to focus the majority of its attention on DAM as a siloed solution, and as such it continues to enjoy the most success with clients using the DAM solution as a standalone without any additional integrations. After we completed our product evaluations for this report, North Plains announced its intent to acquire Xinet and sell Xinet's WebNative Suite as a complementary solution. This move will give North Plains a stronger hold with creative teams but still does not provide any strategic CXM advantage. North Plains must continue to develop functionality and form a more comprehensive CXM strategy or risk being overshadowed by ambitious Contenders.

- **MediaBeacon's functionality gives it potential, but growing pains hold it back.** Minneapolis, Minnesota-based MediaBeacon focuses exclusively on its DAM offering, MediaBeacon R3volution. MediaBeacon differentiates from competitors with its strong search capabilities, a widgets-based user interface, and its existing relationship with Cognizant and IBM (which has no DAM offering, though Forrester expects this to change in the near future). While overall functionality continues to be strong, MediaBeacon must continue to improve workflow and globalization support in order to keep up with competitors that have shown improvements in these areas. However, MediaBeacon's biggest threat comes from its lack of CXM vision and the unusual number of customer complaints about customer service and scalability. MediaBeacon hopes to solve the latter by increasing its ties with Cognizant for customer support. However, MediaBeacon's lack of CXM vision threatens to leave it a siloed, niche player instead of an integrated piece of the CXM puzzle.
- **EMC has the functionality but has yet to move outside its Documentum installed base.** Hopkinton, Massachusetts-based EMC (a nonparticipating vendor in this evaluation) is a legacy player that has long been at the forefront of the ECM market. It has a broad range of capabilities and strengths, particularly in its traditional document management support. Its Digital Asset Manager product's strengths fall within the traditional bread-and-butter functionality of content management such as rendition management and workflow. Strategically, EMC positions Digital Asset Manager as part of the ECM suites of solutions and relies on a partnership with SDL Tridion to support the delivery of online rich media. While EMC's functionality and resources have potential, EMC has yet to position Digital Asset Manager as part of a comprehensive overall CXM strategy. Instead, EMC continues to sell the product to those who already have components of the Documentum suite. EMC must grow the Digital Asset Manager product to help it emerge from Documentum's shadow.

Contenders

- **Celum hopes to live up to its strategic vision with upcoming increases in functionality.** Linz, Austria-based celum is a comparatively new vendor on the scene, founded in 2000. Celum focuses exclusively on providing a DAM solution geared only toward supporting marketing departments across verticals through brand management, product management, and general content management. As part of this strategy, celum has a formal partnership with eCommerce vendor Hybris: Hybris OEMs a celum-powered module on top of its eCommerce solution. Celum chooses not to sell to the high-end production use case but instead offers three product lines depending on the level of sophistication required. While celum has decent functionality, its challenge is to live up to its comprehensive vision with improved functionality across the board. Celum has begun to address this with its rollout of the Synergy product (Forrester evaluated celum Imagine, not Synergy, for this report), but celum has yet to establish an enterprise track record with this product.

- **Veteran Canto struggles with marketing positioning.** San Francisco, California-based Canto offers its Cumulus DAM solution as one that is particularly suited for the line-of-business, general purpose use case. Canto focuses on its security capabilities and plans to increase its integrations with other enterprise applications (particularly SharePoint). Cumulus has standout functionality to support mobile worker content management needs, and it has aggressively invested in this area. As such, Canto has developed Cumulus applications for Android, BlackBerry, and iOS and continues to invest heavily in mobility. However, despite across-the-board functionality that makes it a relevant vendor, Canto struggles with strategic vision and execution. Canto product management has given little thought to how DAM fits into the CXM and marketing ecosystems, and Cumulus still works best as a siloed solution.
- **Widen must improve functionality and vision to sustain its enthusiastic consumer base.** Madison, Wisconsin-based Widen Enterprises has experienced considerable success with its SaaS product in the manufacturing vertical and has begun to expand into marketing departments across verticals. Widen's smaller IT footprint, relatively lower cost, and ease of implementation make it best suited for those who need a DAM solution for brand management but have limited resources. Widen's strength is its cloud vision, aggressive update cycle (two major and two minor releases a year), and its particularly passionate user base driven by exceptional customer service. However, Widen still lags behind other vendors in terms of overall functionality (search and globalization/localization, in particular) and market-leading vision. In order to evolve into a best-of-breed solution, Widen must create a more comprehensive strategic vision of DAM as a CXM solution, which should help Widen guide future functionality improvements.
- **Xinet eyes a place in the CXM ecosystem but has yet to execute on this vision.** Berkeley, California-based Xinet has had considerable success in the advertising vertical and continues to enjoy the most success with these customers. Recently, Xinet has begun to extend its reach beyond just advertising and has dipped its toes into supporting marketing and corporate communications content. To support this extension, Xinet has begun to align its strategy around the CXM set of solutions, looking particularly to a closer convergence between WCM and DAM. But even though Xinet has recognized the importance of the convergence between DAM and WCM, it hasn't executed on this vision with formalized partnerships or prepackaged integrations with leading WCM or other CXM solutions. In terms of functionality, Xinet's strength lies in its expanding video support and the sheer number of languages supported out of the box (18 total language packs available), but workflow and search are still areas of relative weakness. New owner North Plains plans to sell the Xinet platform in addition to the North Plains platform. While this acquisition may bring greater resources to boost Xinet's functionality, it does not yet address Xinet's strategic weaknesses. In order to grow in this rapidly evolving market, North Plains and Xinet must create a more comprehensive CXM strategy.

Risky Bets

- **Extensis targets the creative professional with a lightweight, easy-to-implement solution.** Portland, Oregon-based Extensis offers DAM and font management solutions and is a relative veteran on the DAM scene. Extensis offers a relatively inexpensive and quick-to-implement DAM solution designed with creative professionals in mind. Extensis will even sell its DAM solution as a complementary product, aimed at creative professionals, to larger-footprint rich media management solutions. Extensis' key area of focus is a user interface (UI) that — while lacking the bells and whistles of some higher-end solutions — is intuitive for creative professionals. Along those lines, Extensis' strategy focuses on supporting the content creation process by offering a simple end user experience. Extensis' key weakness, however, is its lack of across-the-board functionality, particularly in workflow, search and taxonomy, and audio and video. In order to become a viable and scalable enterprise-class solution, Extensis must better balance increased functionality with its mantra of ease of use. Otherwise, Extensis will remain relegated to being a complementary, niche product meant for smaller workgroup deployments instead of a true enterprise-class DAM solution.

SUPPLEMENTAL MATERIAL

Online Resource

The online version of Figure 4 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 the following 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 and vendor strategy session.** We asked vendors to conduct demonstrations of their product's functionality and to conduct strategy sessions to communicate vision and strategic execution. 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 at least two 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 lab evaluations, questionnaires, demos, and/or 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 The rich media management marketplace remains fragmented and complicated, in part due to the widely varying definitions of the term digital asset management. In order to make sense of this complicated space, AD&D pros should examine their own needs against the set of capabilities within four flavors of DAM: high-end production, mid-level marketing operations, corporate audio and video, and line-of-business general purpose. See the April 28, 2011, "[The Rich Media Management Mystery](#)" report.
- ² The DAM landscape is fragmented and has multiple vendors offering a variety of solutions. Forrester interviewed more than 20 DAM vendors in order to gauge the types of solutions that are offered. See the December 21, 2010, "[Market Overview: Rich Media Management Software](#)" report.
- ³ Enterprises have increasing volumes of content and increasingly need to support multiple content types in different ways. They don't necessarily need a single ECM vendor that supports all content types. Instead, when developing a content strategy, organizations should consider persuasive, transactional, and foundational content functionality to support specific business use cases. See the April 14, 2011, "[Plan Your ECM Strategy For Business, Persuasive, Transactional, And Foundational Needs](#)" report.
- ⁴ A new type of solution is emerging from a variety of content management, eCommerce, and marketing technology products. The goal? To support targeted experiences — both automated and rule-driven — across multichannel digital experiences as well as offline points of contact such as call centers and stores/

branches. Organizations use increasingly complex cross-channel strategies to drive customer response, and more will take advantage of customer experience management (CXM) solutions — particularly in the online channels — to drive optimized experiences, improve service levels, and increase sales. Content management solutions will provide an important foundation for CXM and will need to integrate with other applications to form CXM solutions. See the August 10, 2011, “[Harnessing The Convergence Of Customer Experience Management Solutions](#)” report.

- ⁵ Rich media content is at the core of creating engaging and dynamic online experiences. Marketers should utilize the pin-up content format of the empowered era in order to engage customers: video. To engage consumers in this fragmented new landscape, companies must elevate product strategy, elevate content strategy within that, and integrate video at its core. See the January 26, 2011, “[Put Video At The Heart Of Your Content Strategy](#)” report.

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