

# The Forrester Wave™: Web Content Management Systems, Q1 2015

by Ted Schadler, February 4, 2015

## KEY TAKEAWAYS

### **Web Content Management Is The Backbone Of Digital Experiences**

Web content management (WCM) began life as a simple dynamic web page hosting product, but it has grown over almost two decades to become a multifaceted toolkit for building, managing, delivering, and optimizing digital experiences, the bedrock of your business technology agenda.

### **Vendors Extend Their WCM Backbones Into Marketing, Mobile, And Cloud**

After evaluating 10 products, viewing 10 product demos, listening to 10 vendor briefings, and interviewing 37 reference customers, we found an amazingly consistent market positioning and vision for growth as every vendor is focused on marketing scenarios, mobile device support, and increasingly their cloud deployment story.

### **The Results: Adobe And Sitecore Lead A Strong Field**

Forrester assessed 10 vendors: Acquia, Adobe, Ektron, EPiServer, HP, IBM, OpenText, Oracle, SDL, and Sitecore. Criteria such as cloud, mobile, and marketing and commerce integration differentiate Adobe and Sitecore. But the field is strong with vendors that we would recommend to clients depending on their specific requirements.

### **Access The Forrester Wave Model For Deeper Insight And Custom Rankings**

Use the detailed Forrester Wave model to view every piece of data used to score participating vendors and create a custom vendor shortlist. Access the report online and download the Excel tool using the link in the right-hand column under “Tools & Templates.” Alter Forrester’s weightings to tailor the Forrester Wave model to your specifications.



## The Forrester Wave™: Web Content Management Systems, Q1 2015

Adobe And Sitecore Lead A Strong Field Of Vendors

by [Ted Schadler](#)

with [Stephen Powers](#) and Steven Kesler

### WHY READ THIS REPORT

Web content management (WCM) software has become the technology and content delivery backbone of digital experiences. Firms that want to upgrade for mobile devices, consolidate potentially thousands of websites, or expand digital experiences to every customer touchpoint must choose a solid web content management product. Forrester has evaluated 10 vendors — Acquia, Adobe, Ektron, EPiServer, HP, IBM, OpenText, Oracle, SDL, and Sitecore — on 36 criteria for current offering, strategy, and market presence. We focus on baseline capabilities such as content and experience management, delivery, and optimization as well as on mobile support, cloud deployment, and integration with components such as marketing and commerce. Application development and delivery (AD&D) professionals can customize the requirements to re-rank the vendors according to their specific digital experience needs.

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### Notes & Resources

Forrester conducted product demonstrations and briefings in October and November 2014 for Acquia, Adobe, Ektron, EPiServer, HP, IBM, OpenText, Oracle, SDL, and Sitecore. We also interviewed 37 reference customers and seven partners.

### Related Research Documents

[Market Overview: Digital Customer Experience Delivery Platforms](#)  
December 9, 2014

[Market Overview: Web Content Management For Digital Experiences](#)  
December 8, 2014

[The Forrester Wave™: Digital Experience Delivery Platforms, Q3 2014](#)  
July 22, 2014

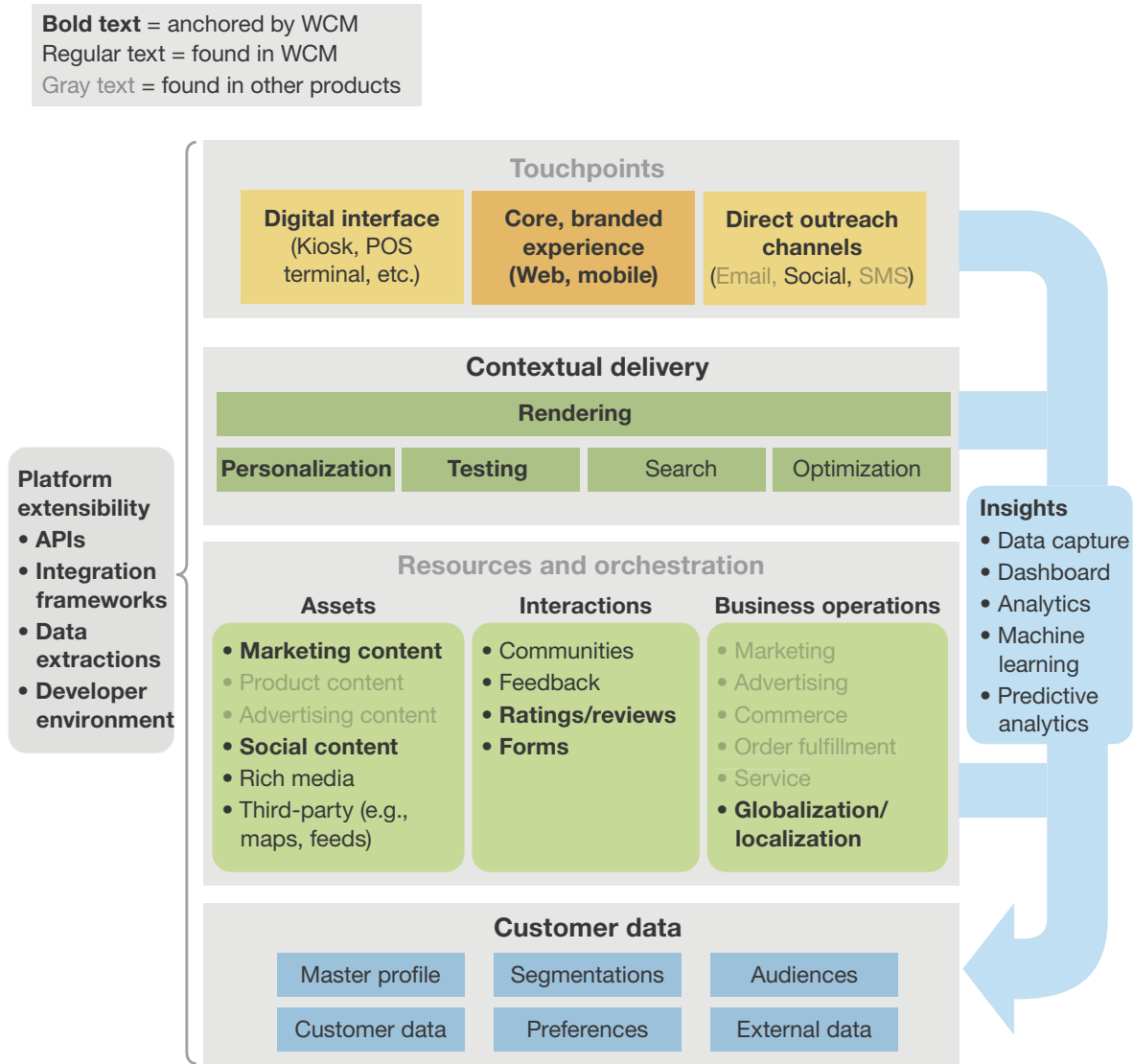


## WEB CONTENT MANAGEMENT IS THE BACKBONE OF DIGITAL EXPERIENCES

Web content management (WCM) began life as a simple dynamic web page hosting product, but it has grown over almost two decades to become a multifaceted toolkit for building, managing, delivering, and optimizing digital experiences, the bedrock of your business technology agenda.<sup>1</sup> That means the WCM market is full of long-lived and high-functioning vendors. And although the name is antiquated and belies its true, multi-channel purpose, web content management solutions have never been important than they are today because:<sup>2</sup>

- **One billion websites blanket the world — and every one of them has or should have a WCM.**<sup>3</sup> The web is woven tightly into our daily lives as consumers, patients, citizens, parents, and employees. And every one of those websites is anchored by a web content management system. That's a lot of experiences to cover. Now imagine if every web content management system went belly up at the same time. The world would grind to a halt.
- **Web content management is a backbone of digital experience delivery.** Along every step of the customer journey, from discovery to engagement, companies use some specialized product — marketing software suites, commerce suites, customer service systems, social networks, community sites, and so on. Each one of these is linked to or built on a web content management backbone (see Figure 1).

**Figure 1** Web Content Management Anchors Digital Experiences



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### WCM Systems Manage, Deliver, And Optimize Experiences

So while the WCM market has existed for decades, it continues to change, driven by customer demands for mobile, social, and personal experiences and by the rising needs of application development and delivery (AD&D) professionals and marketers to win, serve, and retain customers.<sup>4</sup> Every few years a new lineup of vendors emerges to take another swing at this colorful and once again rapidly changing market. The latest entrants, vendors like Crafter Software and Contentful, bring new mobile-first, open web architectures. The best web content management vendors:

- **Help practitioners manage content and digital experiences.** Content is at the core of great digital experiences. These tools help practitioners — content authors, editors, site designers, marketers, merchandisers, product managers, and so on — create and manage content, media, and experiences. That means great products will have a great user experience for practitioners and will give them access to all of the content assets and tools, including content authoring, rich media, workflows, taxonomy tools, and segmentation.
- **Deliver great experiences on browsers and mobile devices.** WCM vendors adapted to mobile devices with responsive web design capabilities. But the bar for delivering great experiences in a customers' mobile moment of need continues to rise. This holiday season, for example, Wal-Mart reported that 70% of its online traffic came from smartphones and tablets.<sup>5</sup> Vendors are responding (albeit slowly) with mobile software development kits (SDKs), better content application programming interfaces (APIs), and multidevice analytics.
- **Optimize experiences across every step of a customer's journey.** Testing, analytics, personalization, segmentation, and architecture to support high-volume global sites and mobile apps are critical capabilities for Forrester customers. WCM vendors support these requirements with a steadily advancing toolkit of NoSQL databases, test and target tools, and rules-based personalization.

### Vendors Extend Their WCM Backbones Into Marketing, Mobile, And Cloud

After evaluating 10 products, viewing 10 product demos, listening to 10 vendor briefings, and interviewing 37 reference customers, we found an amazingly consistent market positioning and vision for growth as every vendor is:

- **Adding marketing software suite support with uneven results.** Every vendor has a marketing technology story to tell. Adobe, IBM, and Oracle have top-shelf marketing software suites and vendors including Sitecore, SDL, Ektron, and OpenText have also made marketing — and marketing technology buyers — a priority. AD&D pros: Be sure to ask for customer references before jumping in.
- **Integrating, often inconsistently, with other components of digital experiences.** WCM vendors also anchor great commerce experiences and tie into many other applications, including online analytics and test and target tools, customer segmentation, video distribution, customer communications management, customer relationship management (CRM), digital asset management, and employee portal products. As seen in Figure 1, WCM is responsible for key elements of that portfolio. While every vendor has an integration story to tell, none integrates effectively with every component. Be sure to evaluate the WCM portfolio, not just the WCM system.

- **Looking to the cloud for growth, though lagging with SaaS deployments.** The WCM market has been stubbornly resistant to the cloud even as marketing technology has flocked to the cloud for all the right reasons: device support, economics, rapid deployment, and offloading tedious operations. Now, every vendor is bragging about its single-tenant, platform-as-a-service (PaaS) managed service offering and talking about software-as-a-service (SaaS) deployments to come. Rapidly growing Acquia has a SaaS offering already as does CrownPeak, a vendor we didn't evaluate.
- **Claiming a mobile strategy while failing to effectively support mobile apps.** Frankly, we expected mobile apps to differentiate the products. It didn't. Every vendor used responsive web design effectively in the product demos.<sup>6</sup> But mobile app support was non-existent. Since writing *The Mobile Mind Shift*, we learned how important native mobile apps are to great mobile moments.<sup>7</sup> We expect Adobe and IBM to lead the way to native or hybrid mobile apps.
- **Customizing experiences through software development with mixed results.** In our 37 customer reference interviews, we found a tremendous variety of scenarios, many requiring extensive customization and integration. This requirement makes APIs, software development, a component marketplace, and developer networks critical capabilities in the WCM market. In our evaluation, Acquia and Sitecore have the strongest API and component ecosystem strategies.

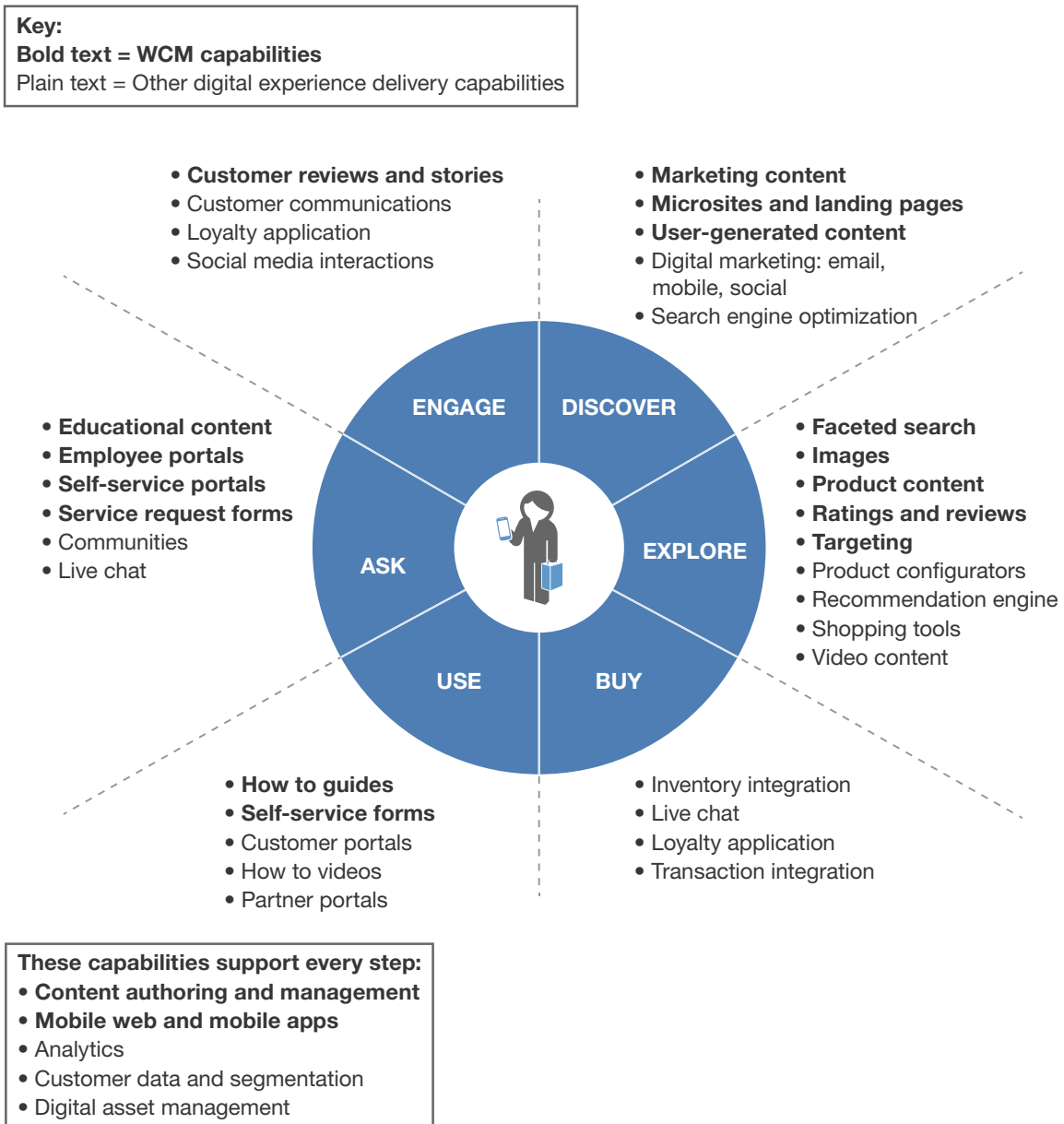
## WCM TOUCHES EVERY STEP OF THE CUSTOMER AND EMPLOYEE JOURNEY

Web content management solutions are not just for consumer experiences. With more than a billion public websites in the world and at least that many inside corporate walls, WCM is the backbone for:

- **Consumer engagement.** In the age of the customer, delivering great digital experiences is an essential strategy. As the content and engagement backbone of digital experience delivery platforms, web content management solutions are part of every scenario and application that customers touch, from discovery all the way through to engagement (see Figure 2).<sup>8</sup>
- **Business customer portals.** Business customers — and the employees that serve them — engage with digital services on every device throughout the workday. WCM solutions offer the content and engagement capabilities that business customers need. The requirements expand to include CRM integration and partners ready to build B2B solutions.
- **Dealer and affiliate networks.** Digital touchpoints extend out to dealers and franchise partners as well. Some WCM solutions are designed and have a track record of handling thousands of different agent or store or dealer sites and apps. Many existing homegrown solutions are primed for replacement with WCM solutions.

- **Employee portals.** Employees engage with company resources every day. Some WCM vendors focus on employee experiences. One retailer uses Ektron’s WCM solution to support more than 100,000 employees with a portal that works on browsers and mobile devices. With mobile devices now a dominant business tool, many old employee sites need a new WCM foundation.<sup>9</sup>

**Figure 2** The Role Of Web Content Management Systems In A Customer Journey



## WEB CONTENT MANAGEMENT SYSTEMS EVALUATION OVERVIEW

With so many scenarios and this rapidly expanding responsibility and toolkit, it's important for AD&D pros to carefully assess their web content management backbone. To help, Forrester examined its previous research, assessed enterprise customer scenarios, and conducted vendor and expert interviews to develop a comprehensive set of 36 evaluation criteria with detailed scoring for each (see Figure 3). We organized the criteria into:

- **Current offering.** We assessed products for strength in content management; web, mobile, and multichannel hosting and delivery; the ability to target and optimize experiences; and support for marketing, commerce, customer communications, employee, and business customer scenarios.
- **Strategy.** We reviewed each vendor's strategy, evaluating its focus and execution on architecture, mobility, cloud deployment, component marketplace, developer commitment, APIs, and partners. We further assess strategy based on customers' operating experiences.
- **Market presence.** We also evaluated each vendor's product customer count, product revenue, product revenue growth, and global presence. By focusing on product metrics, we focus attention on the vendor's market presence and success with its web content management product.



**Figure 3** In The Evaluation Process, We Rigorously Examine And Score Each Criterion: A Sample

Evaluation criteria	Criteria explanation	Scale explanation
<b>Current offering</b>		
Content authoring and workflow	How does the product support content authoring and workflow?	Based on Forrester’s assessment of each of the following capabilities (1/2 point each) for a maximum of five points with extra points given for advanced functionality: <ul style="list-style-type: none"> <li>• Native creative content authoring tools.</li> <li>• Pre-built integration with creative content authoring tools.</li> <li>• Native approval workflows, including delegation, administrative control, and content-category workflow modeling.</li> <li>• Integration with workflow engines.</li> <li>• Support for workflow standards like jBPM.</li> <li>• Native collaboration tools to manage teams, notifications, and workflow.</li> <li>• Annotation within the content editing tool.</li> </ul>
23 more current offering criteria		
<b>Strategy</b>		
Product architecture	How well suited is the product architecture to the requirements for digital experiences on all touchpoints?	Based on Forrester’s assessment for these capabilities of the product’s architecture with extra points given for advanced functionality: <ul style="list-style-type: none"> <li>• Content management decoupled from content delivery (1/2 point).</li> <li>• Ability to run as a multitenant SaaS deployment (1/2 point).</li> <li>• Support clustered deployment of repository and delivery (1/2 point).</li> <li>• Slow-loading page components fail gracefully and are flagged as failing (1/2 point).</li> <li>• API extensions to resources outside the product’s direct control (1/2 point).</li> <li>• Support for delivery tier capabilities such as in-memory caching, content delivery networks, geolocation, and mobile redirection (1/2 point).</li> </ul>
6 more strategy criteria		
<b>Market presence</b>		
Product customer count	How many customers (unique accounts) does the customer have for this product line?	5 = The product line has 20,000 or more customers. 4 = The product line has between 10,000-19,999 customers. 3 = The product line has between 5,000 to 9,999 customers. 2 = The product line has between 1,000 to 4,999 customers. 1 = The product line has fewer than 1,000 customers.
3 more market presence criteria		

## We Evaluated 10 Web Content Management Products

When selecting vendors for this evaluation in September 2014, we focused on those that had significant momentum, were making strategic commitments to the market, and were most common on enterprise shortlists. Forrester assessed 10 vendors: Acquia, Adobe, Ektron, EPiServer, HP, IBM, OpenText, Oracle, SDL, and Sitecore. In September 2014, each of these vendors has (see Figure 4):

- **Experience as the primary solution for web content management in large organizations.** These products serve at least some key enterprise digital experience scenario: consumer, business customer, franchisees, or employee. Not all vendors cover all scenarios, but collectively they cover the requirements of Forrester’s enterprise clients.
- **Significant interest from Forrester clients.** Forrester fielded more than 500 inquiries with enterprise clients on web content management and digital experiences in the last 12 months. Through these detailed conversations, we prioritize criteria and vendors based on enterprise needs.
- **Fifty million dollars in revenue or consistently strong momentum.** Forrester tracks more than 27 vendors that anchor customers’ digital experiences. To qualify for the Forrester Wave evaluation, we limited participation to vendors with at least \$50 million in WCM or digital experience revenue annually and significant momentum.

**Figure 4** Evaluated Vendors: Product And Vendor Information And Selection Criteria

Vendor	Product name and version
Acquia	Acquia Platform, November 2014
Adobe	Adobe Experience Manager (AEM) 6.0
Ektron	Ektron Content Management System (CMS) V9.1
EPiServer	EPiServer Cloud, November 2014
HP	HP TeamSite 7.5
IBM	IBM Customer Experience Suite 8.5, IBM Employee Experience Suite 8.5
OpenText	OpenText Web Experience Management 10.5
Oracle	Oracle WebCenter Sites version 11.1.1.8
SDL	SDL Web, November 2014
Sitecore	Sitecore Experience Platform 8

### Inclusion criteria

Experience as the primary solution for web content management in large organizations.

Significant interest from Forrester clients.

Fifty million dollars in product revenue or consistently strong momentum.

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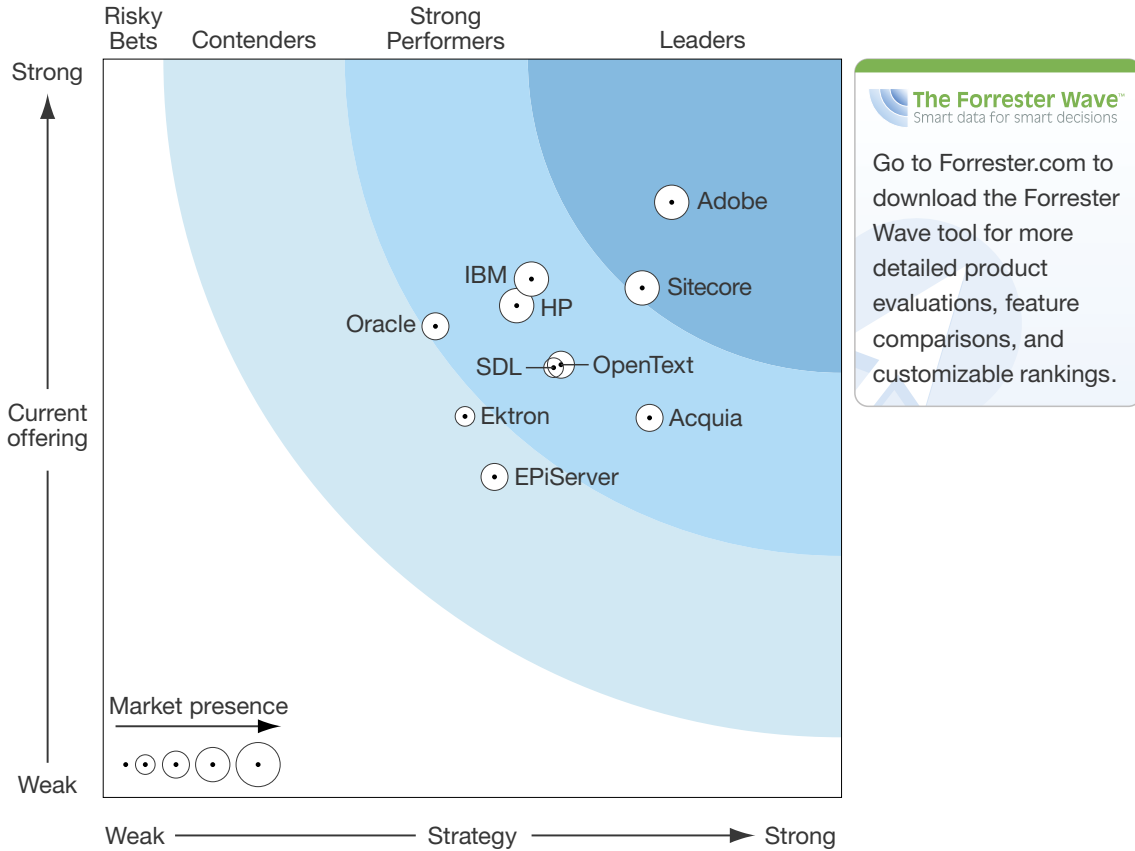
## THE RESULTS: ADOBE AND SITECORE LEAD A STRONG FIELD

The WCM vendors we evaluated cover the basics of managing, delivering, and optimizing digital experiences quite well. Vendors varied widely on many of those criteria two years ago, but they are now similar (and good) in this baseline functionality. The criteria we view as growing in importance — cloud deployment, native mobile app support, portfolio integration with marketing and commerce, testing, runtime architecture, and ecosystem support — differentiate the solutions.

To create the right shortlist of vendors, use our Forrester Wave Excel-based vendor comparison tool to dial up weightings for factors that matter most to you. Forrester's evaluation of the WCM market, weighted according to our most common enterprise requirements, revealed that (see Figure 5):

- **Adobe and Sitecore are Leaders, with Adobe dominating the field.** Adobe is a standout with its integrated portfolio. Sitecore has a strong product and high growth.
- **Cloud-based Acquia and cloud-focused IBM earn Strong Performer status.** IBM and Drupal-based newcomer Acquia show that cloud deployments can deliver strong feature sets.
- **HP, OpenText, Oracle, and SDL are also Strong Performers.** All four vendors have significant installed base and capability, though none is growing strongly.
- **Ektron and EPiServer, now a single company, are Contenders.** Since we performed this evaluation US-based Ektron and Sweden-based EPiServer have merged under new leadership to become one company with two products.

Figure 5 Forrester Wave™: Web Content Management For Digital Experiences, Q1 '15



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**Figure 5** Forrester Wave™: Web Content Management For Digital Experiences, Q1 '15 (Cont.)

	Forrester's Weighting	Acquia	Adobe	Ektron	EPI/Server	HP	IBM	OpenText	Oracle	SDL	Sitecore
<b>CURRENT OFFERING</b>	50%	2.57	4.03	2.58	2.17	3.33	3.51	2.93	3.19	2.91	3.45
Content authoring and workflow	5%	3.00	4.00	4.00	3.00	3.00	3.00	4.00	3.00	4.00	4.00
Content management	5%	3.00	3.00	3.00	3.00	4.00	4.00	4.00	4.00	3.00	3.00
Content tagging and taxonomies	5%	3.00	4.00	3.00	2.00	4.00	3.00	4.00	3.00	4.00	4.00
Digital asset management	5%	1.00	3.00	1.00	1.00	4.00	3.00	5.00	3.00	2.00	2.00
Globalization and localization	5%	4.00	3.00	3.00	3.00	3.00	4.00	3.00	3.00	5.00	4.00
Profiling and segmentation	2%	4.00	5.00	3.00	2.00	4.00	4.00	3.00	4.00	3.00	4.00
Site design	3%	3.00	5.00	3.00	3.00	4.00	4.00	3.00	4.00	4.00	4.00
Content targeting and preview	3%	3.00	5.00	2.00	3.00	3.00	3.00	2.00	3.00	3.00	4.00
Multichannel delivery	2%	3.00	4.00	3.00	4.00	4.00	4.00	3.00	3.00	4.00	4.00
Multisite support	2%	4.00	4.00	4.00	3.00	4.00	4.00	4.00	4.00	4.00	4.00
Polling, feedback, and user-generated content	3%	4.00	4.00	4.00	3.00	4.00	4.00	3.00	3.00	4.00	4.00
Mobile apps	5%	2.00	4.00	3.00	1.00	3.00	2.00	2.00	2.00	1.00	3.00
Mobile Web	5%	4.00	5.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00
Performance optimization	5%	3.00	3.00	2.00	2.00	3.00	3.00	3.00	2.00	3.00	3.00
Testing	10%	1.00	5.00	1.00	1.00	4.00	1.00	1.00	3.00	1.00	3.00
Analytics	10%	3.00	5.00	3.00	2.00	3.00	5.00	2.00	3.00	3.00	4.00
Marketing suite integration	10%	2.00	5.00	2.00	2.00	2.00	5.00	3.00	4.00	3.00	4.00
Commerce suite integration	5%	2.00	4.00	2.00	2.00	2.00	5.00	2.00	5.00	2.00	3.00
Customer communication management integration	2%	0.00	0.00	0.00	0.00	5.00	0.00	4.00	0.00	1.00	0.00
CRM integration	2%	3.00	3.00	3.00	2.00	3.00	2.00	2.00	3.00	3.00	3.00
Privacy and preferences	2%	4.00	3.00	3.00	2.00	4.00	4.00	3.00	1.00	3.00	3.00
Extranets	2%	1.00	2.00	4.00	3.00	4.00	4.00	4.00	3.00	4.00	4.00
Intranets	1%	2.00	2.00	3.00	2.00	2.00	4.00	3.00	3.00	2.00	2.00
Enterprise portal integration	1%	2.00	2.00	3.00	1.00	2.00	5.00	5.00	5.00	2.00	3.00
Product information	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

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

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**Figure 5** Forrester Wave™: Web Content Management For Digital Experiences, Q1 '15 (Cont.)

	Forrester's Weighting	Acquia	Adobe	Ektron	EPI/Server	HP	IBM	OpenText	Oracle	SDL	Sitecore
<b>STRATEGY</b>	50%	3.70	3.85	2.45	2.65	2.80	2.90	3.10	2.25	3.05	3.65
Product architecture	10%	3.00	4.00	2.00	3.00	3.00	3.00	3.00	3.00	4.00	3.00
Mobile strategy	25%	2.00	5.00	2.00	1.00	4.00	4.00	4.00	3.00	2.00	4.00
Cloud strategy	25%	5.00	2.00	2.00	3.00	1.00	1.00	3.00	0.00	3.00	3.00
API strategy	5%	5.00	3.00	4.00	3.00	3.00	3.00	3.00	3.00	3.00	4.00
Component ecosystem	10%	5.00	3.00	2.00	3.00	2.00	3.00	2.00	3.00	3.00	4.00
Partner strategy	5%	2.00	5.00	1.00	2.00	2.00	2.00	2.00	3.00	3.00	4.00
Reference customer assessment	20%	4.00	5.00	4.00	4.00	4.00	4.00	3.00	3.00	4.00	4.00
<b>MARKET PRESENCE</b>	0%	2.75	3.95	1.75	2.60	3.15	3.25	2.70	2.70	1.70	3.15
Product customer count	15%	2.00	2.00	2.00	3.00	2.00	2.00	1.00	1.00	1.00	2.00
Product revenue	40%	2.00	5.00	1.00	2.00	3.00	4.00	3.00	3.00	2.00	3.00
Product revenue growth	30%	5.00	4.00	3.00	3.00	3.00	2.00	3.00	2.00	1.00	4.00
Global presence	15%	1.00	3.00	1.00	3.00	5.00	5.00	3.00	5.00	3.00	3.00

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

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## VENDOR PROFILES

- Adobe has built the best portfolio for companies with the greatest marketing need.** San Jose, California-based Adobe's "acquire and integrate" strategy is paying off as it incorporates analytics, testing, social media, rich media delivery, and content management functionality into the Java-based Adobe Experience Manager, for a best-in-class practitioner experience. This product is among the most expensive, but is well suited for marketers, particularly but not exclusively in consumer markets. Adobe offers a rapidly-growing managed single-tenant cloud service.

Standout features include the practitioner toolkit, partner support, and mobile support. Opportunities for improvement, where they exist at all, are found in digital asset management, extranet and intranet installed base, and more experience with cloud hosting. Strategically, Adobe is well placed to continue its run, particularly as it and its partners gain mobile and cloud experience.

One customer reference uses Adobe for 3,000 affiliate websites and is pleased with the product quality overall, but particularly the practitioner tools so affiliates can manage their own digital experiences. Another customer is happy with the Adobe products for testing, analytics, and marketing. Both customers wish they had spent more time and used more experienced partners to configure the product architecture and template structure.

- **Sitecore offers a quality WCM-anchored suite targeted at marketing scenarios.** Copenhagen, Denmark-based Sitecore offers a suite that includes a WCM backbone integrated with marketing software, analytics, and social media integration, and even a commerce server. One benefit of a suite approach is a more consistent user experience and integrated toolkits such as workflow, testing, and analytics. Sitecore doesn't implement solutions, instead relying on a strong partner lineup, including services from Deloitte Digital and Razorfish. Sitecore's pricing is also attractive, particularly when compared with similar marketing-focused competitors. Sitecore's cloud offering is a managed single-tenant service, which it hosts for more than 100 customers.

Standout features for this .NET product include content tagging and targeting, customer profiling, and multisite and multichannel delivery. The product has room for improvement in the number of customers using it, native mobile app support, and cloud deployment experience. Strategically, the company's suite approach will help customers quickly configure and deploy experiences across most steps of the customer journey.

One global customer reference described a user-friendly and high-quality marketing and site hosting experience . . . once a Sitecore "guru" joined the agency team implementing the site. Another described a similarly good experience with the core product, with greatly improved web engagement — who also wished he had insisted on a partner with more Sitecore experience.

### Strong Performers

- **Acquia offers a cloud-first, Drupal WCM solution well suited to multi-site firms.** This Burlington, Massachusetts-based vendor delivers a WCM cloud service based on open source Drupal. The product's capabilities have improved since the last evaluation, and growth has accelerated to an estimated 85% annually. The product benefits from the large and active PHP-based Drupal community of developers, led by Drupal creator and Acquia co-founder Dries Buytaert. Acquia's pricing is subscription-based and attractive compared with most other WCM solutions. Acquia is cloud-first and offers the product as a managed single-tenant cloud service for more than 800 customers and a SaaS service for more than 3,000 customers.

Standout features include the cloud strategy, solid content management and delivery functionality, and a strong developer community and component ecosystem. Opportunities for improvement also abound, led by the need for stronger marketing and commerce integration, digital asset management links, and global presence. Strategically, Acquia is well-placed to help large firms consolidate their sites using the SaaS SiteFactory where appropriate.

One customer reference described how they use Acquia to consolidate 2,800 corporate sites using a small number of repeatable template designs. They are on track, with 900 sites now converted to Acquia Drupal. Another customer uses Acquia SiteFactory to deploy hundreds of templated but separately branded sites.

- **HP has revitalized its WCM product to target enterprise marketing.** Palo Alto, California-based HP has reorganized the former Interwoven TeamSite and LiveSite under the marketing division of HP Software. The Java-based TeamSite product sits alongside the search, customer communications management, and rich media products. While the organizational structure implies a marketing focus, Forrester believes that HP's offering is also appropriate for extranet scenarios such as found in manufacturing or financial services. HP has begun to deploy the product as a managed single-tenant service in a private or public cloud.

Standout features include content tagging and targeting, rich media management, testing, and a solid decoupled architecture. Opportunities for improvement lie in multichannel delivery, mobile apps, APIs, partners, and most importantly, market growth. Strategically, HP's WCM market success will depend on how well the HP sales force accepts and sells the product within HP's new HP Software business unit.

One reference customer uses the product for 45 sites in 15 languages. He likes the product for its global scale and distributed capabilities. Another has been using the product for 12 years and likes its capabilities for empowering content creators to manage their own sites. Reference customers only spoke about content-centric experiences, not marketing or commerce ones.

- **IBM has revitalized its WCM backbone under a cloud suite model.** Armonk, New York-based IBM's product is much improved since our last evaluation. To run this Java-based product on-premises, you will need to augment it with IBM modules such as mobile, analytics, and portal. Customers building an employee portal or a business extranet will find much of what they need in this product. Customers needing IBM's marketing and commerce offerings will find its WCM product to be a solid backbone, but lacking in broad partner support. IBM offers the product as a managed single-tenant cloud service hosted on its IBM SoftLayer cloud.

Standout features include good marketing and commerce integration, an improved set of practitioner tools, strong analytics, deep content management, and extranet and employee portal support. Opportunities for improvement lie in proving out the cloud capability, better testing features, and delivering mobile apps. Strategically, IBM's SoftLayer and Bluemix cloud strategy and strong digital experience delivery portfolio gives it a strong platform for enterprise and now also for mid-market firms.

One reference customer loves the refreshed product and spoke highly of the content template library that made it easy to get 3,000 affiliate sites up and running. Another was pleased with giving content creators access to the publishing tools. Both said that deployment on-premises required strong IBM WebSphere skills.



- **OpenText maintains its WCM within its information management portfolio.** Waterloo, Ontario-based OpenText understands the content management market well; not surprisingly, its Web Experience Management product (formerly Vignette) offers strong content management functionality. Forrester believes that that product is best suited for existing customers, especially those looking to consolidate their vendor portfolios. OpenText's cloud offering is a managed single-tenant service, which it hosts for more than 100 customers.

Standout features for this Java-based product lie within the enterprise content and digital asset management features, customer communications management, and decoupled delivery architecture. Opportunities exist to improve optimization features like testing and analytics, greatly improve the customer references, and integrate it with marketing and commerce suites. Developers and partners will be key to any growth because strategically, OpenText appears more focused on information management than digital experience delivery.

The customer references were not always enthusiastic about their experiences. One customer reference uses OpenText for a basic publishing scenario, as well as for a more complex collaboration site with partners, and liked the self-service content authoring capabilities. Another customer likes the content publishing tools but said that their implementation was poorly designed to scale globally. Also, customers wished they had more expertise when setting up and configuring the system.

- **Oracle has improved its WCM solution but faces slow product growth.** Redwood Shores, California-based Oracle has pursued an acquire-and-integrate strategy for digital experience delivery, but has not yet demonstrated that WCM is the backbone of that strategy. So while the Java-based WCM product, formerly Fatwire, shows solid features and improvement, it's not yet seeing growth. For Oracle customers deploying its commerce offering, this WCM system can be a smart choice due to the integration between the two products. Oracle offers the product as an on-premises license with plans to offer it as a single-tenant cloud service in the future.

Standout features include content management; audience profiling and segmentation; integration with Oracle's marketing, commerce, and portal products; and global presence. Opportunities lie in improving multisite delivery and multichannel support, accelerating anemic growth, and greatly improving customer references. Strategically, Oracle appears to have turned a corner with this product, but it still needs to show customers and partners that it's ready.

One customer reference finds the Oracle product fine for basics and is happy with the result, but says the implementation was "kludgy, built on an old JSP model; you can see the changes in ownership reflected in the code." Another global company likes the product for its portal capabilities, but also bemoaned the age of the codebase and said finding development talent was difficult, particularly in Europe.

- **SDL differentiates on localization.** Maidenhead, UK-based SDL has undergone a significant corporate restructuring to simplify its business unit structure and refocus investment on growth. The firm saw some product growth driven by European sales from an integrated content and marketing product in 2014, but the bulk of the company and its strongest differentiation come from language translation and its BluePrinting technology to support multiple sites in almost any language. SDL's cloud offering is a managed single-tenant service, which it hosts for more than 100 customers.

Standout features of this product include content authoring and tagging, multichannel delivery and multisite support, and the product architecture, particularly for multi-language sites. Opportunities lie in improving the installed base and reigniting growth, focusing on mobile apps, growing partner relationships, and integrating with more marketing and commerce offerings. Strategically, the product should appeal in scenarios with strong globalization requirements.

One reference customer works with SDL on an employee site for product sales and support. The offering covered the territory of content publishing with many authors and an authenticated experience well. Another customer likes the SDL product, but struggled to find a partner with experience, so wound up using SDL's services.

## Contenders

The vendors in the Contenders category — Ektron and EPiServer — are now a single company owned by Accel-KKR called EPiServer with new leadership. While it's too early to know how the ownership structure might change the product offerings and strategy, Forrester believes that this investor's track record of building portfolios of complementary products as it did with KANA Software in CRM indicates that it will bring EPiServer and Ektron's products together over time, starting in the cloud.<sup>10</sup> So while it's hard to predict which modules will form the foundations, we believe customers will have time and a migration path to any future merged product and company.

- **Ektron offers a solid features for mid-market companies or scenarios.** Nashua, New Hampshire-based Ektron is one of the smaller vendors in our evaluation. This .NET-based company has a solid, but limited WCM offering well suited for mid-market customers with content-centric experiences, particularly in North America. Ektron has pursued different strategies over the years — sometimes expanding through services that annoy its partners, sometimes focusing on product integration, and sometimes on new features. Currently, Ektron focuses on marketing scenarios with a WCM backbone and a marketing automation product. Ektron's cloud strategy focuses on hosting the product as a managed single-tenant cloud service.

Standout features include strong multisite support, APIs, and extranet support for business customers. Opportunities lie in improving marketing and commerce suite integration, better content targeting and workflow, and a stronger global presence. Strategically, the company will need to manage growth and product improvements under new ownership and company integration.

One reference customer raved about how well suited the product was to its content-centric intranet with 100,000 users. Another, a mid-market global company uses the product for country websites with content but little marketing.

- **EPiServer wins in Europe for mid-market firms or scenarios.** Stockholm, Sweden-based EPiServer is a new entrant in our evaluation. This .NET-based company has a solid, but limited WCM offering and commerce server well suited for mid-market customers, particularly in Europe. The company has a strong partner strategy to sell and serve customers in 30 countries as well as more than 24,000 developers registered in its network. This kind of traction indicates that companies use the product in a broad number of industries and scenarios. EPiServer's cloud offering is a managed single-tenant service, which it hosts for 1,800 customers.

Standout features include developer support and cloud hosting experience. Opportunities for improvement lie in many areas: content tagging and taxonomies, customer segmentation, localization, and mobile strategy. Strategically, the company will need to manage growth and product improvements under new ownership and company integration.

One reference customer described how easy it was to get the product up and running saying, "I was self-taught and got it running in a few days." Another customer uses EPiServer to tailor different, though branded experiences for 300 franchisees using a consistent template structure and assets.

## 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 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.** We asked vendors to conduct demonstrations of their 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

- <sup>1</sup> Businesses need an array of software technology to support digital customer experiences, but they struggle to understand and leverage the tools necessary to create and manage unified, multichannel digital customer experiences across multiple touchpoints. Application development and delivery (AD&D) professionals must evaluate, implement, integrate and build front-end experiences on-top of this fragmented landscape. Technology vendors try to help by bringing more complete digital customer experience portfolios to the market, although hopes for a homogenous environment are unrealistic at this point. In this report, we define the emerging digital customer experience delivery platform, explore the vendors delivering these solutions, and provide insight into the approaches these vendors take to integrate with the technologies in which their customers have already invested. See the December 9, 2014, "[Market Overview: Digital Customer Experience Delivery Platforms](#)" report.
- <sup>2</sup> Web content management (WCM) has never been important than it is today. Yesterday's web-only sites have become today's mobile-first, data-driven digital experiences, now squarely in the hands of business practitioners anxious to win, serve, and retain customers. Vendors with long web histories and startups compete to help you refresh, revitalize, and amplify the digital experiences for consumers, business customers, and employees. When choosing a new WCM solution, application development and delivery (AD&D) professionals must consider the disruptive impact of mobile, cloud, data, integration, and increasingly impatient business practitioners. This report lays out the disrupters, vendor landscape, and a starting point for making a smart selection. See the December 8, 2014, "[Market Overview: Web Content Management For Digital Experiences](#)" report.

- <sup>3</sup> Netcraft's September 2014 web survey reports more than a billion websites and 178 million active sites globally. Source: "September 2014 Web Server Survey," Netcraft, September 24, 2014 (<http://news.netcraft.com/archives/2014/09/24/september-2014-web-server-survey.html>).
- <sup>4</sup> Empowered customers are disrupting every industry — and CIOs need to understand how technology management must adapt in this rapidly evolving world. This report outlines how the age of the customer will place harsh and unfamiliar demands on institutions, necessitating changes in how they develop, market, sell, and deliver products and services. CIOs and their teams will be called on to support these changes, widening their agendas beyond IT (infrastructure) to include business technology (BT) — technology, systems, and processes to win, serve, and retain customers. This report serves as a clarion call to CIOs. Specifically, it explains: 1) how to achieve the right mix of IT and BT; 2) which methods will help you build a highly effective BT portfolio; and 3) how to improve collaboration with other executives in your company who are also meeting the customer challenge — in particular, chief marketing officers (CMOs) and customer experience professionals. See the October 10, 2013, "[Technology Management In The Age Of The Customer](#)" report.
- <sup>5</sup> Source: Sarah Perez, "Walmart.com Reports Biggest Cyber Monday In History, Mobile Traffic At 70% Over The Holidays," TechCrunch, December 2, 2014 (<http://techcrunch.com/2014/12/02/walmart-com-reports-biggest-cyber-monday-in-history-mobile-traffic-at-70-over-the-holidays/>).
- <sup>6</sup> Companies struggle to choose between building a mobile app and implementing a mobile website. The decision becomes a battle shrouded in competing points of view and often a lack of customer information about the benefits and risks of each. To help you make the best choice possible, we have painted the differences between mobile app and mobile Web in black and white: Use mobile apps for engagement; use mobile Web for reach. We then shaded the spectrum with the factors pushing in one direction or the other. To make the best choice for your customer, assemble a cross-disciplinary team of marketing, business, and IT, and use data on the mobile mind shift to shed light on customers' expectations and requirements. Regardless of the choice, eBusiness pros and marketing leaders will find they need to spend more money and develop a much closer working relationship with IT. CIOs will find they need new skills, a new engagement platform, and a much closer working relationship with marketing and business. See the December 17, 2013, "[Mobile App Or Mobile Web? It's A Choice, Not A Battle](#)" report.
- <sup>7</sup> Source: Ted Schadler, Josh Bernoff, and Julie Ask, *The Mobile Mind Shift: Engineer Your Business to Win in the Mobile Moment*, Groundswell Press, 2014.
- <sup>8</sup> In Forrester's 29-criteria evaluation of digital experience delivery providers, we identified the 13 most significant software vendors — Acquia, Adobe, Demandware, Digital River, HP Autonomy, hybris, IBM, Intershop, OpenText, Oracle, salesforce.com, SDL, and Sitecore — in the category and researched, analyzed, and scored them. This report details our findings about how well each vendor fulfills our criteria and where they stand in relation to each other in order to help application development and delivery (AD&D) professionals select the right products for their digital experience delivery needs. See the July 22, 2014, "[The Forrester Wave™: Digital Experience Delivery Platforms, Q3 2014](#)" report.

- <sup>9</sup> Many organizations face an aging and ineffective existing portal infrastructure. Upgrading will require a very different strategy that will not include anything that looks like an existing portal. A mature and once decidedly unsexy technology, portals (or at least the use case for portals) are hot again. These “engagement workplaces” will combine traditional publishing and employee self-service functionality with enterprise social, document collaboration, and extended transactional capabilities wrapped with pervasive mobile access. And while all of these functions will need to come together in an integrated user experience, they will likely come from different solutions and even different vendors. See the February 3, 2014, “[Brief: Your Next Portal Should Be An Engagement Workplace](#)” report.
- <sup>10</sup> In 2009, Accel-KKR acquired the assets and liabilities of KANA Software for \$40.82 million. Source: “Accel-KKR Closes Acquisition Of Kana Assets And Liabilities,” KANA Software, December 23, 2009 (<http://www.accel-kkr.com/pdf/KingMaker%20Closing%20Release%20Final%2012%2023%2009.pdf>). In 2014, after a series of portfolio-related acquisitions under the KANA brand name, Accel-KKR sold KANA to Verint Systems for \$514.2 million, an increase of \$473 million in just over four years. Source: “Accel-KKR Completes Sale of KANA Software, Inc. to Verint Systems Inc. for \$514.2 Million in Cash,” Accel-KKR, February 3, 2014 ([http://www.accel-kkr.com/Portals/0/KANA\\_close%20press%20release\\_February%203%202014\\_FINAL.pdf](http://www.accel-kkr.com/Portals/0/KANA_close%20press%20release_February%203%202014_FINAL.pdf)).

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