July 13, 2011

The Forrester Wave™: Web Content Management For Online Customer Experience, Q3 2011

by Stephen Powers
for Content & Collaboration Professionals

July 13, 2011

The Forrester Wave™: Web Content Management For Online Customer Experience, Q3 2011
SDL And Adobe Lead The Way To Customer Experience Management (CXM)

by Stephen Powers
with Matthew Brown and Joseph Dang

EXECUTIVE SUMMARY

The web content management (WCM) market is in transition. Functionality to enable publishing to the Web — whether internally or externally — has become commoditized. Yet now, the WCM market is growing based on customer experience management (CXM) needs, including multichannel delivery, content targeting, analytics, and integration with other CXM technologies. Forrester evaluated 10 WCM products across approximately 115 criteria and found that they have a lower level of maturity when viewed against these capabilities. SDL and Adobe lead due to their rich functionality, strategy, and enterprise track record. Strong Performers Sitecore, FatWire, OpenText, and Autonomy all provide strong options. Contender Ektron has solid functionality, but needs to work on its enterprise-level track record. Contender IBM lacks the broad set of capabilities others have in WCM, but has other CXM software assets and a strategic integration road map. Contenders Microsoft and Oracle have less of a CXM focus, but are legitimate alternatives for less interactive experiences.

TABLE OF CONTENTS

NOTES & RESOURCES

Forrester evaluated 10 products and 30 user companies.

Related Research Documents

A MULTITUDE OF PLAYERS POPULATES THE WCM MARKET

Evolving multichannel needs and the absence of any truly dominant players have led to a fragmented WCM market. A large number of vendors now support internal and external web publishing and experience management requirements. These players include:

- **ECM vendors.** Players such as IBM, Microsoft, Oracle, and OpenText have broad offerings across the entire enterprise content management (ECM) spectrum.[1] ECM clients may find that they can leverage existing relationships with these vendors to score favorable license deals for WCM products. OpenText continues to devote resources to two WCM products: Web Experience Management (formerly Vignette), which we have evaluated in this report, and Web Site Management (formerly RedDot), which the vendor targets at organizations that need to quickly create and deploy both internal and external websites. In addition, since we performed this evaluation, Oracle announced its intention to acquire FatWire, giving it a stronger entry in the CXM space.

- **CXM stack players.** An array of vendors have begun to put together some, though not all, of the technology pieces needed to support online CXM. IBM offers WCM, portal (IBM WebSphere), marketing tools (Unica), commerce (IBM WebSphere Commerce Server), and analytics (Coremetrics). Adobe has WCM (Day), analytics, testing and optimization, and recommendations (Omniture). SDL features WCM, globalization services, and recommendations (Fredhopper). Autonomy has WCM, search engine technologies (IDOL), and testing and optimization (Optimost). Alterian has WCM and marketing suite tools.

- **Independents.** The field of independent WCM vendors is vast and includes midmarket players (Percussion and Clickability, a software-as-a-service player now owned by Limelight); those which have previously targeted the midmarket and now aim to compete at the enterprise level (Sitecore, Ektron, and CrownPeak, another SaaS player); and a host of European players now targeting the North American market (Atex, CoreMedia, EPiServer, eSpirit, GX, and Kentico).

- **Open source.** A host of open source players abound, although Forrester clients may find the base level of functionality lower than some of the higher end, proprietary players in terms of CXM capabilities. This field includes products that with commercial backing — such as those from Alfresco, Drupal, DotNetNuke, eZ Systems, Jahia, Magnolia, and OpenCms — and those that are community-based, such as Drupal, Joomla, and Plone.

CUSTOMER EXPERIENCE MANAGEMENT: THE REAL WCM DIFFERENTIATOR

A new type of online CXM solution set is emerging from the components of multiple technologies — including WCM — in order to better support the creation and management of rich, interactive, multichannel experiences. Forrester defines CXM as:

> *A set of solutions which enable the management and delivery of dynamic, targeted, consistent content, offers, products, and service interactions across digitally enabled consumer touchpoints.[2]*

Previously, organizations, processes, and technologies to serve the online channels were siloed, resulting in overhead, inconsistent experiences, and inability to measure results. However, as online initiatives have evolved and matured, so have product offerings to support those initiatives.

The Key Components Of CXM

Three categories of solutions comprise online CXM: those based on process, delivery, and measurement (see Figure 1).

- **Process-based solutions enable business users to create experiences.** Process-based solutions consist of tools that business users (as opposed to IT users) use to create and manage structured and unstructured content for customer experiences. This category includes WCM, digital asset management (DAM), eCommerce, customer relationship management (CRM), marketing campaign management, marketing resource management, desktop publishing tools (such as Microsoft Word), and interactive development environments (IDEs).

- **Delivery solutions bring interactive experiences to customers.** Vendors often tightly couple both WCM and eCommerce solutions with native delivery tiers, enabling businesses to create content and design and deliver experiences in a single package. But other technologies enable experience delivery, including rules- or algorithm-based content targeting solutions like search, personalization, and recommendations engines; marketing automation solutions such as campaign management and offer management; and customer service interaction management solutions that support customer data and history, customer self-service, knowledge management, and customer feedback management.

- **Customer intelligence solutions enable businesses to gauge the success of experiences.** A/B and multivariate testing enable marketers and business users to test out variations of experiences on certain demographics before rolling them out to a broader audience. Web analytics tools give insight into how consumers consume content and interact with experiences. Social analytics provide insight into how consumers engage with companies by monitoring social interactions.

Figure 1 A Variety Of Components Comprise CXM Solutions

58958   Source: Forrester Research, Inc.

WCM Becomes A Critical Cornerstone In A CXM Foundation

Currently, no single vendor or product offers all of the components of an online CXM ecosystem. Even if one did exist, most enterprises have made significant investments in existing CXM components and can't make the business case to rip and replace their tools. So integration between these components will be an important component in the coming years (see Figure 2). WCM's ability to offer some of these CXM features, as well as integrate with others, is a key component of success (see Figure 3).

Figure 2 Decision-Makers Plan To Integrate WCM With Other Applications

"With which other enterprise applications to you plan to integrate WCM? Please rank the following."
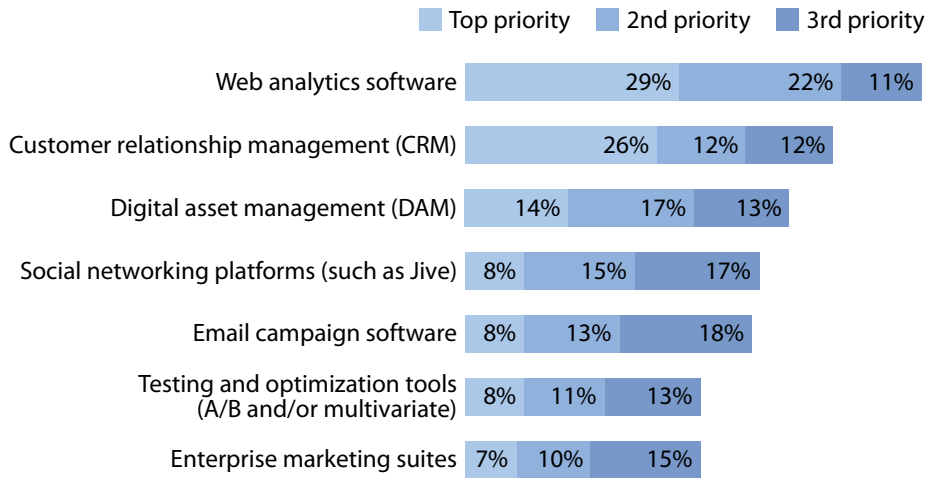
Top priority   2nd priority   3rd priority

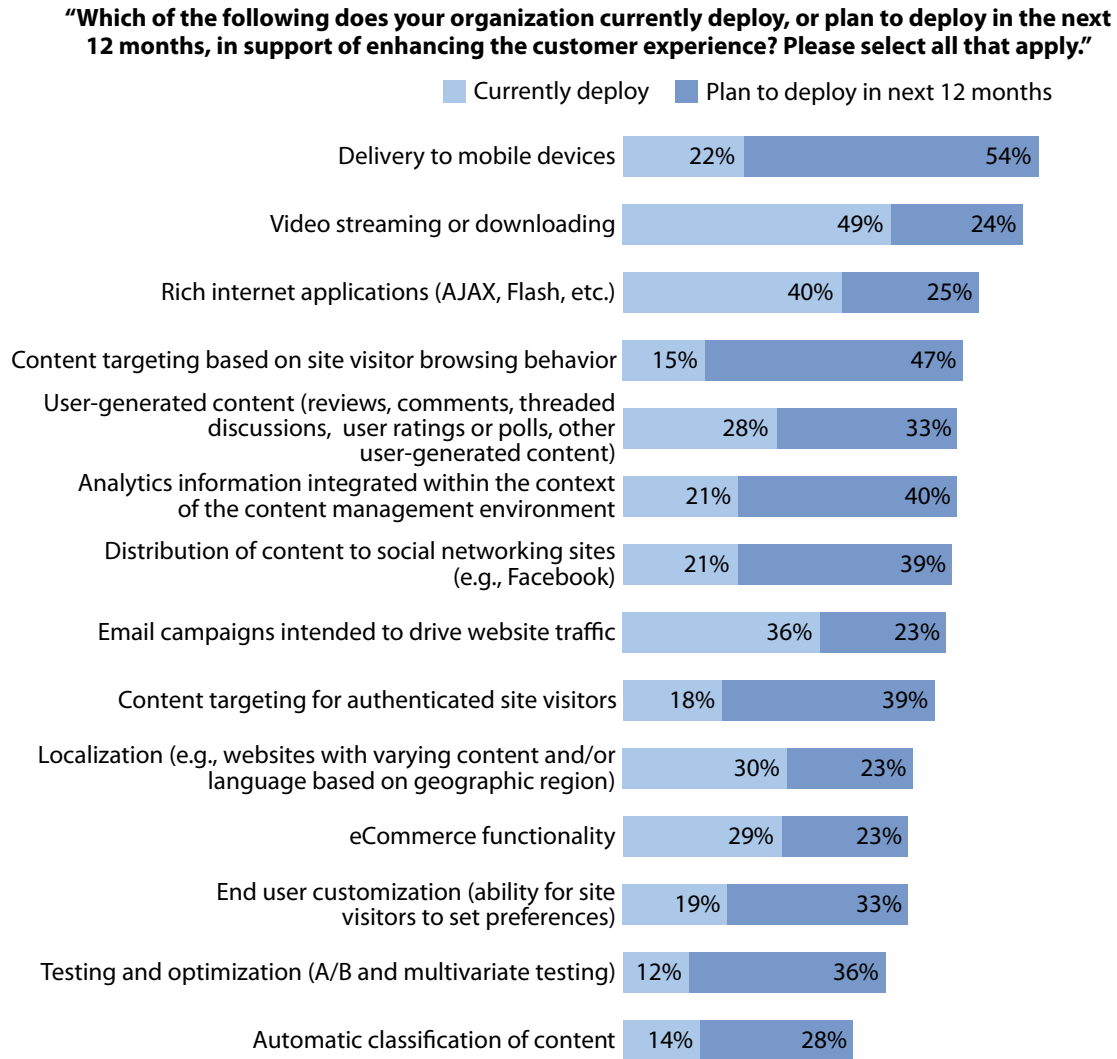|	Top priority	2nd priority	3rd priority
Web analytics software	29%	22%	11%
Customer relationship management (CRM)	26%	12%	12%
Digital asset management (DAM)	14%	17%	13%
Social networking platforms (such as Jive)	8%	15%	17%
Email campaign software	8%	13%	18%
Testing and optimization tools (A/B and/or multivariate)	8%	11%	13%
Enterprise marketing suites	7%	10%	15%

Base: 218 WCM decision-makers primarily supporting public-facing websites

Source: January 2011 Global Web Content Management Online Survey

58958   Source: Forrester Research, Inc.

Figure 3 WCM Decision-Makers Plan Customer Experience Initiatives

"Which of the following does your organization currently deploy, or plan to deploy in the next 12 months, in support of enhancing the customer experience? Please select all that apply."

Currently deploy   Plan to deploy in next 12 months

	Currently deploy	Plan to deploy in next 12 months
Delivery to mobile devices	22%	54%
Video streaming or downloading	49%	24%
Rich internet applications (AJAX, Flash, etc.)	40%	25%
Content targeting based on site visitor browsing behavior	15%	47%
User-generated content (reviews, comments, threaded discussions, user ratings or polls, other user-generated content)	28%	33%
Analytics information integrated within the context of the content management environment	21%	40%
Distribution of content to social networking sites (e.g., Facebook)	21%	39%
Email campaigns intended to drive website traffic	36%	23%
Content targeting for authenticated site visitors	18%	39%
Localization (e.g., websites with varying content and/or language based on geographic region)	30%	23%
eCommerce functionality	29%	23%
End user customization (ability for site visitors to set preferences)	19%	33%
Testing and optimization (A/B and multivariate testing)	12%	36%
Automatic classification of content	14%	28%

Base: 218 WCM decision-makers primarily supporting public-facing websites

Source: January 2011 Global Web Content Management Online Survey

58958   Source: Forrester Research, Inc.

WEB CONTENT MANAGEMENT FOR ONLINE CUSTOMER EXPERIENCE EVALUATION OVERVIEW

To assess the state of the WCM market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top WCM 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 110 criteria, which we grouped into three high-level buckets:

- **Current offering.** To assess product strength, we evaluated each offering against 10 groups of criteria: 1) content authoring; 2) presentation management; 3) library services; 4) globalization and localization; 5) publishing and deployment; 6) content targeting; 7) multichannel delivery; 8) customer experience integration; 9) social and community tools; and 10) 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 CXM requirements, and whether or not the vendor has a path to deliver 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.

Vendors Selected For CXM Functionality And Enterprise Track Record

In this evaluation, Forrester examined vendors that enable marketing and business teams to use WCM in conjunction with other components of the CXM ecosystem to support rich, interactive, multichannel customer experiences. Forrester included 10 vendors in the assessment: Adobe, Autonomy, Ektron, FatWire, IBM, Microsoft, OpenText, Oracle, SDL, and Sitecore. The WCM market remains somewhat fragmented, but these 10 vendors represent the strongest in terms of stability, functionality, and experience providing the primary WCM product for firms within the Forrester client base. Specifically, each of these vendors has (see Figure 4):

- **A product supporting interactive, multichannel experience rather than just web publishing.** Products in this category not only have content management and web publishing capabilities, but also have capabilities — such as content targeting, social tools, and enterprise application integration — supporting interactive multichannel experiences.

- **Significant track record as the primary WCM for customer experience in large organizations.** This category comprises vendor solutions primarily targeted toward organizations with revenues of more than $1 billion per year. WCM vendors in this category focus on enterprise-class organizations, scale to serve large user populations and support highly trafficked websites, and offer multisite and multilingual support.

- **Interest from Forrester clients.** Forrester clients repeatedly ask about the evaluated products within the context of inquiry, advisory, and consulting, and/or have them installed as the primary WCM for supporting customer experience-based websites.

- **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.

Figure 4 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product Name	Version	Release Date
Adobe	CQ5	5.4	February 2011
Autonomy	Autonomy TeamSite Autonomy LiveSite	7	June 2010
Ektron	CMS400.NET	8.02	October 2010
FatWire	FatWire Content Server	7.5.5	September 2010
IBM	IBM Web Content Management	7	August 2010
Microsoft	SharePoint Server	2010	May 2010
OpenText	Web Experience Management	8	December 2009
Oracle	Universal Content Management Web Content Management	11gr2	September 2009
SDL	SDL Tridion	2011	January 2011
Sitecore	Sitecore Web Content Management System (CMS) Sitecore Online Marketing Suite	6.4.1 1.1.1	January 2011 November 2010

Inclusion criteria

A product supporting interactive, multichannel experience rather than just web publishing. Products in this category not only have content management and web publishing capabilities, but also have capabilities — such as content targeting, social tools, and enterprise application integration — supporting interactive multichannel experiences.

Significant track record as the primary WCM for customer experience in large organizations. This category comprises vendor solutions primarily targeted toward organizations with revenues of more than $1 billion per year. WCM vendors in this category focus on enterprise-class organizations, scale to serve large user populations and support highly trafficked websites, and offer multisite and multilingual support.

Interest from Forrester clients. Forrester clients repeatedly ask about the included products within the context of inquiry, advisory, and consulting, and/or have them installed as the primary WCM for supporting customer experience-based websites.

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.

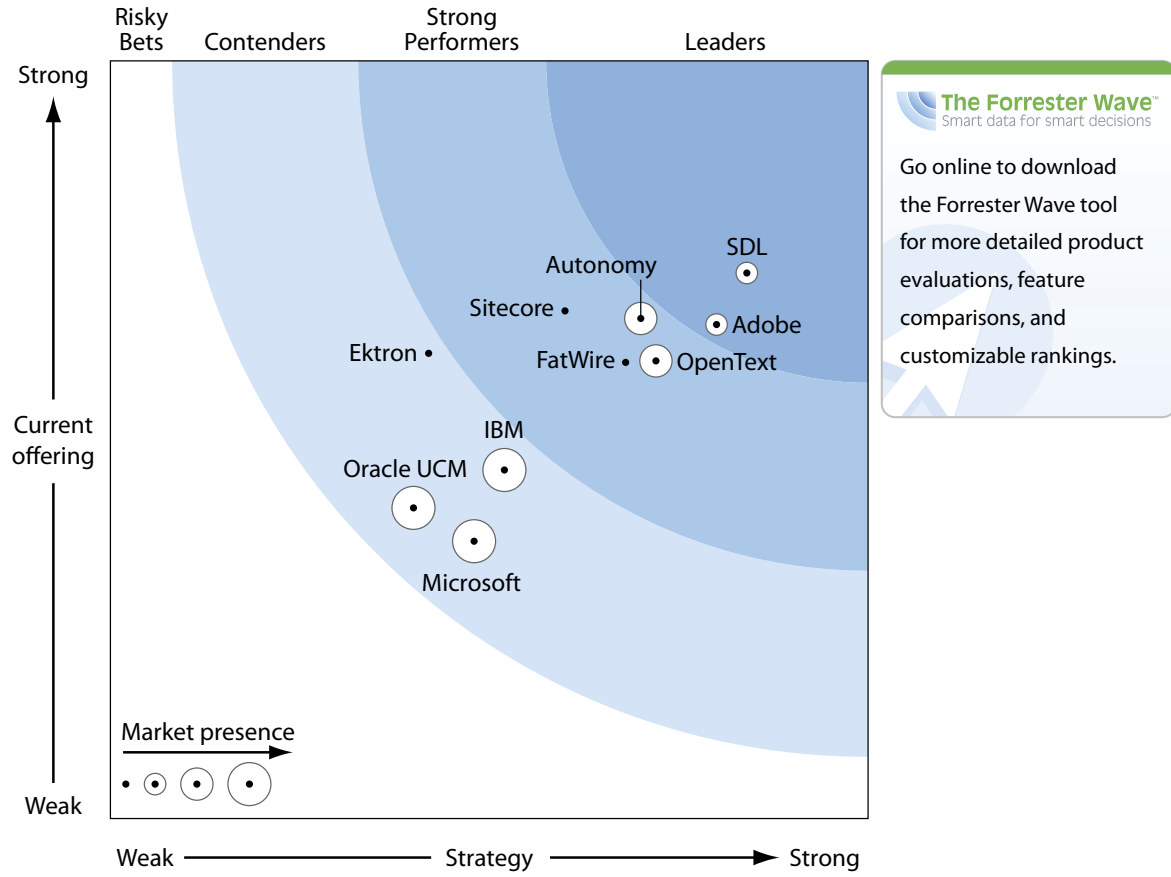Source: Forrester Research, Inc.

THE RESULTS: SDL AND ADOBE LEAD, BUT ALL NEED WORK TO FULLY SUPPORT CXM

The evaluation uncovered a market in which (see Figure 5):

- **SDL and Adobe lead due to breadth of functionality, market momentum, and track record.**
  Both Adobe and SDL provides a solid set of tools aimed at enabling business users to manage
  experiences. SDL's globalization and localization functionality remains a differentiator and has
  the potential to be an asset for mobile website management. Adobe has an excellent offering
  in terms of technology and features, and its integration with other Adobe-owned CXM
  components shows potential.

- **Autonomy, OpenText, FatWire, and Sitecore offer competitive options.** Autonomy, a Leader
  in The Forrester Wave™: Web Content Management For External Sites, Q2 2009, has multiple
  CXM components, although its demo did not reflect as broad a set of functionality as SDL and
  Adobe. OpenText's Web Experience Management product has a new architecture and solid
  functionality, but needs more integration with complementary products. FatWire's product still
  has strong functionality, although some of its peers have caught up to the vendor, which was
  also a Leader in the 2009 Forrester Wave report.[3] Sitecore shows a great deal of momentum
  with its strong feature set and product vision, but needs to continue to prove itself as the sole
  provider of experience-based WCM with larger customers.

- **Ektron offers broad functionality but needs to prove itself at the enterprise level.** Ektron has
  a solid set of functionality, but to be truly relevant to Forrester clients it needs to work on its
  customer reference list to build a track record as the primary CXM-based WCM for large-scale
  sites that use advanced features such as content targeting and multichannel delivery.

- **IBM, Microsoft, and Oracle have narrower functionality but potential differentiators.** These
  three products don't currently offer the same level of CXM-based functionality as their peers
  in this report, although Oracle has taken a step in that direction with its purchase of FatWire.
  Each of these vendors does offer potential in terms of resources (all have deep pockets) and
  complementary products (search and commerce for Microsoft; commerce, CRM, and predictive
  analytics for Oracle; and analytics, commerce, and testing/optimization for IBM).

This evaluation of the WCM 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.

Figure 5 Forrester Wave™: Web Content Management For Online Customer Experience, Q3 '11

Source: Forrester Research, Inc.

Figure 5 Forrester Wave™: WCM For Online Customer Experience, Q3 '11 (Cont.)

	Forrester's Weighting	Adobe	Autonomy	Ektron	FatWire	IBM	Microsoft	OpenText	Oracle UCM	SDL	Sitecore
CURRENT OFFERING	50%	3.26	3.30	3.07	3.01	2.30	1.83	3.02	2.05	3.60	3.35
Authoring tools	10%	3.25	3.55	2.40	3.10	1.95	2.30	4.05	1.90	4.30	4.15
Presentation management	10%	4.00	3.00	2.20	4.30	2.00	2.60	3.70	2.80	4.40	3.90
Library services	5%	3.95	4.30	2.40	3.00	2.20	2.70	4.40	3.00	3.30	2.05
Globalization and localization	10%	3.00	2.60	3.00	2.60	2.10	1.40	2.90	2.50	4.90	3.00
Content publishing and deployment	5%	4.00	3.40	1.80	3.60	3.40	2.80	3.40	3.60	3.60	2.60
Content targeting	15%	2.35	4.15	3.30	2.95	3.65	2.30	3.90	2.05	3.60	2.75
Multichannel delivery	15%	3.20	1.55	2.20	2.65	1.15	0.45	2.55	0.40	4.50	3.70
Customer experience management	15%	3.35	3.00	4.40	2.30	2.45	1.60	1.00	1.25	1.25	3.30
Social and community controls	10%	2.50	4.40	4.35	2.40	0.80	1.25	2.00	1.90	2.40	3.50
Product architecture	5%	5.00	5.00	3.50	5.00	5.00	3.00	5.00	5.00	5.00	4.00
STRATEGY	50%	4.00	3.50	2.10	3.40	2.60	2.40	3.60	2.00	4.20	3.00
Product strategy	100%	4.00	3.50	2.10	3.40	2.60	2.40	3.60	2.00	4.20	3.00
Cost	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
MARKET PRESENCE	0%	2.42	3.62	1.88	1.67	4.53	4.63	3.48	4.29	2.49	1.98
Installed base	20%	2.30	4.10	3.15	2.15	4.90	4.55	2.45	2.70	2.10	2.95
Revenue	30%	4.20	3.00	1.50	1.30	4.00	4.40	2.80	4.50	2.90	1.80
Services	20%	1.00	4.00	2.50	1.25	4.50	4.50	4.50	4.50	3.25	1.75
Global presence	25%	2.00	4.00	1.00	2.00	5.00	5.00	4.00	5.00	2.00	1.00
License partners and resellers	5%	0.00	2.00	1.00	2.00	4.00	5.00	5.00	5.00	1.00	5.00

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

Source: Forrester Research, Inc.

VENDOR PROFILES

Leaders

- **SDL leads thanks in part to its globalization and localization functionality.** Maidenhead, UK-based SDL offers a broad set of functionality for persuasive content initiatives, particularly in the area of globalization and localization (augmented by integration with SDL's language translation products). Its Blueprinting technology — which enables enterprises to manage sites in multiple languages and/or for multiple brands — stands out from others with its graphical administrative and design interfaces. Also, SDL gives more than lip service to the print channel, seriously tackling the issue of repurposing web content in the print channel with its relationship with Pitney Bowes. SDL's two notable areas where it needs improvement include management of

rich media (and the vendor took a step forward in this area after this evaluation was completed with its acquisition of European video management vendor Calamares) and integration with other CXM components such as analytics, testing and optimization, and CRM.

- **Adobe boasts first-class technology, with CXM strategy execution in early stages.** San Jose, Calif.-based Adobe acquired Day Software and its Communiqué WCM product last year, which boasts slick user interfaces that sit on top of a recently updated architecture. Adobe's WCM is especially strong on enabling business users to manage presentation as well as content via slick user interfaces, and benefits from a rich media product that was built on the same architecture as its WCM product, a differentiator in this evaluation (the rich media product is automatically installed at the same time as the WCM product and only requires a license key to activate). Adobe's challenge is uniting its various CXM components — such as the Omniture suite of marketing, targeting, and analytics products and the Adobe desktop tools — with WCM. The vendor is early in its integration plans. But it has great potential, and implementation firms report a good deal of success behind Adobe's offering.

Strong Performers

- **Autonomy offers broad CXM functionality and a strong focus on search-based capabilities.** Cambridge, UK-based Autonomy's strengths include presentation management, content publishing and deployment, rich media (surfacing functionality from Autonomy's MediaBin rich media management product), and testing/optimization (via its Optimost product). In addition, the content targeting capabilities powered by its IDOL search engine offer a potential differentiator. Also, Autonomy has made architectural improvements in its latest version, responding to criticisms of its older, heavy architecture in earlier versions. Several references did mention continued challenges with customizing the product, particularly in the areas of documentation and customer support, so those prepared to do a good amount of customization will want to do due diligence in this area. Multichannel functionality is weak compared to most others in this evaluation. And Autonomy's WCM product road map is neither as strong nor ambitious as Leaders SDL and Adobe.

- **OpenText: an ECM vendor with a CXM vision.** ECM vendor OpenText, based in Waterloo, Ontario, understands the content management market very well. So not surprisingly, the Web Experience Management product (formerly Vignette), offers strong support for content authoring and library services. But it also has strong content targeting capabilities. The biggest area that OpenText needs to work on is to either acquire complementary CXM technologies — such as commerce, CRM, and testing and optimization — or develop partnerships with technology vendors that offer them. However, OpenText's deep pockets better position it for this challenge than some of the smaller vendors in this report. OpenText also offers a refreshed product architecture, a major benefit for those anticipating customization. For this reason alone, those who have discounted Vignette when investigating vendors should give OpenText a closer look.

- **FatWire offers a solid WCM product but needs CXM partnerships.** Mineola, N.Y.-based FatWire has strong presentation management tools and deep targeting functionality with its Engage personalization module. FatWire needs to revisit the personalization functionality to make it more user-friendly and updated — it looks the same as it did in previous evaluations. Indeed, many of FatWire's tools could use an update (in terms of usability as opposed to functionality) in order to compete with slicker-looking products such as Adobe's CQ5. In addition, FatWire — as an independent vendor — faced the challenge of not having the same CXM portfolio as other WCM vendors such as Adobe and IBM. New owner Oracle will need to create integrations with other products in its portfolio, such as CRM, eCommerce, and predictive analytics.

- **Sitecore offers broad functionality in early stages of enterprise support.** Copenhagen, Denmark-based Sitecore offers an especially broad set of functionality within its suite. Sitecore's marketing tools, including campaign management, reporting, and e-forms (with CRM integration) differentiate it from many of its peers. Some of its suite strengths may not be assets to those who want to integrate WCM with third-party CXM components — like analytics — rather than using those packaged with the WCM product. And there are a few areas where the product has weaknesses — library services and rich media management in particular. Still, based on the broad functionality, product vision, and value (it offers similar functionality to some of its peers at a significantly lower license price). Sitecore is a vendor to keep an eye on.

Contenders

- **Ektron sets its sights on enterprise support with solid functionality.** Nashua, N.H.-based Ektron has developed tight integrations for its WCM with other components of the CXM ecosystem, such as analytics and CRM. Indeed, its ability to ingest analytics information from third-party products such as Omniture, Webtrends, and Google and display them via heat maps within the content management environment is a model for its peers to follow. Ektron also displays a strong grasp of the importance of the social channel, through its delivery to third-party social networks and ability to ingest profile information from those sites and use it for content targeting. Ektron's content authoring and presentation management tools, while satisfactory, are not as strong as some of its peers. Ektron's biggest challenge, though, is to develop an enterprise track record, as its customer base has traditionally been in the midmarket. During this evaluation, we spoke with several enterprise-class customer references with impressive plans, but they are early on in their implementations.

- **IBM's WCM functionality remains behind, but its CXM ecosystem is strong.** When compared to others in this report, Armonk, N.Y.-based IBM's web content manager focuses more on web publishing than on managing customer experience. It scores behind most or all of its peers in multiple categories such as authoring tools and presentation management (content targeting is a notable exception). It does offer tight integration with the IBM WebSphere Portal

Server, a differentiator, and that makes it an option for those companies looking for a tightly coupled portal and WCM. And IBM owns many other components within the CXM ecosystem, including eCommerce, analytics, and marketing tools. Given its portfolio, deep pockets, and stated strategy, IBM remains a vendor to keep an eye on, but it will have to make a considerable investment in the WCM product to get it up to par.

- **Microsoft offers solid web publishing capabilities, but lacks CXM focus.** Redmond, Wash.-based Microsoft doesn't have the same customer experience focus with its SharePoint product as some other vendors in this Forrester Wave. SharePoint's weaknesses include content targeting, integration with other enterprise applications (even those in the Microsoft portfolio), and perhaps its biggest weakness, multisite and multilingual management. SharePoint's page-based model and versioning capabilities simply don't make the grade for companies that need to share content across multiple sites but manage that content once, rather than multiple times. SharePoint's other weaknesses include multichannel delivery and social capabilities. However, available resources prove an advantage for Microsoft, as developers with some .NET experience can transition to SharePoint, and the large number of SharePoint implementations (the product is widely deployed as an internal content management and collaboration platform) makes the skill set desirable. Organizations needing a quick way to publish mostly informational websites should look at SharePoint, but those with true CXM needs should carefully consider the product's shortcomings when compared to others evaluated in this report.

- **Oracle UCM offers solid content management, but CXM functionality is untapped.** Oracle, based in Redwood Shores, Calif., excels at content management administration capabilities with its Universal Content Management product (UCM was evaluated as Oracle's entry in this report; FatWire was evaluated separately before the acquisition announcement). However, the customer experience capabilities of the product are not at the same level as some of the other products included in this report. After we completed our product evaluations for this report, Oracle announced its intent to acquire FatWire and add a more customer experience-oriented WCM to its product portfolio. Oracle will need to bring FatWire's user interfaces up-to-date, and to integrate the product with its other CXM products such as Siebel, ATG, and Real-Time Decisions. Going forward, we expect Oracle to focus UCM's WCM capabilities more on web publishing, rather than customer experience.

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 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 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] Enterprises 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, they need persuasive, transactional, and foundational content functionality to support specific business use cases. See the April 14, 2010, "Plan Your ECM Strategy For Business, Persuasive, Transactional, And Foundational Needs" report.

[2] To support the rich, dynamic experiences that customers have grown to expect on the Web, C&C pros need to strategically knit together a mix of on-premises and cloud offerings from an ecosystem of providers. See the February 8, 2010, "The Online Customer Engagement Software Ecosystem" report.

[3] In 2009, 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 websites. See the June 1, 2009, "The Forrester Wave™: Web Content Management For External Sites, Q2 2009" report.

FORRESTER®

Making Leaders Successful Every Day

For information on hard-copy or electronic reprints, please contact Client Support at +1 866.367.7378, +1 617.613.5730, or clientsupport@forrester.com. We offer quantity discounts and special pricing for academic and nonprofit institutions.

Forrester Research, Inc. (Nasdaq: FORR) is an independent research company that provides pragmatic and forward-thinking advice to global leaders in business and technology. Forrester works with professionals in 19 key roles at major companies providing proprietary research, customer insight, consulting, events, and peer-to-peer executive programs. For more than 27 years, Forrester has been making IT, marketing, and technology industry leaders successful every day. For more information, visit www.forrester.com.

FORRESTER®