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Content Management

To organize reams of information and crowds of contributors to build sites, firms must select a content management vendor with strong momentum and a product that excels at repository and user management.

2 MARKET LANDSCAPE
- Established products are flexible but expensive to deploy.
- Pre-Web document managers, software giants, and niche players force veterans to innovate.

4 WHAT USERS NEED
- Firms are starting to invest in content management.
- Users think workflow, ease-of-use, personalization, and version control are top requirements.

8 RANKING CRITERIA
- Vendor momentum matters most.
- Product features like collaboration, repository management, and metadata are also very important.

10 VENDOR ANALYSIS
- We researched, analyzed, and ranked the leading vendors.
- Rankings at http://www.forrester.com/TechRankings.

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② # MARKET LANDSCAPE

Four Kinds Of Vendors Help Firms Steer Clear Of Content Chaos

To avoid having a Web site that's a mess -- haphazard storage, error-prone manual processes, and one-off designs -- companies need content management software. But which vendor to choose? The options have broadened beyond the Web content management veterans to include document management ISVs, niche players, and software giants.

CONTENT MANAGEMENT BRINGS ORDER TO WEB SITE MAYHEM

Companies with growing Web sites expose their businesses to error and breakdown as site content mushrooms along with the number of people supplying and consuming it. Bringing order and control where it's needed in this process without sacrificing flexibility is the purpose of a content management system -- which Forrester defines as:

> *Software for contributing, collaborating on, and controlling Web content -- from text and code to multimedia.*

Firms Face Four Types Of Vendors, From Web Natives To Document Managers

The demand for content management is bringing together a diverse pool of competing software vendors. Each of these vendors weaves together very different technology expertise into their products.

- **Established vendors offer large, complex suites.** Vignette and Interwoven are content management veterans that continue to dominate the market. Of the 30 content management buyers we talked with, 60% have purchased from these two vendors. Both vendors have strong revenues and company resources. They maintain a primary focus on developing and selling content management products that span the enterprise -- most deployments cost between $1 million and $3 million and take months to complete.

- **Document management vendors now focus on the Web.** The core of content management -- centralized storage with distributed editing and creation -- comes from *document* management old-timers like Documentum and FileNET. These vendors are developing new features and forging new partnerships to tailor their products for Web content types and delivery.

- **Niche players specialize in deployments.** Smaller vendors tackle focused needs to make the most of their limited resources. Stellent specializes in extranet and intranet deployments, for example, while Gauss and Mediasurface focus primarily on the European market.

- **Software giants creep into the market.** Large software vendors that sell complementary products have started to get serious about content management (see the October 16, 2001 TechRankings™ TechInsight "Software Giants Creep Into Content Management").[1] Microsoft has moved aggressively by acquiring NCompass Labs in May 2001. For now, IBM and Oracle are building their own solutions by extending their database technologies to support the management of unstructured content with features like version control and library services. IBM also recently released its Lotus Web Content Management Solution, which is targeted more at the Web content management market.

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W H A T   U S E R S   N E E D

Users Are Getting Their Feet Wet With Content Management

Firms have been switching from homegrown solutions for content management to packaged products. Despite high installation costs, they're glad they did. But immediate benefits like better workflow and delegated authoring tools are just the beginning. Users say that they'll need wireless support and personalization to handle future site complexity and growth.

THE CONTENT MANAGEMENT MARKET IS JUST WARMING UP

Forrester interviewed 53 new media managers about their content management strategies. Thirty have bought content management solutions. The rest are using homegrown solutions.

Companies Have Just Started Buying

Of the 30 firms that have bought content management products, 40% purchased in the past four months. For another 30%, the decision to buy occurred in the past nine to 12 months. For most of these firms, it's the first time they've invested in a content management product (see Figure 1-1).
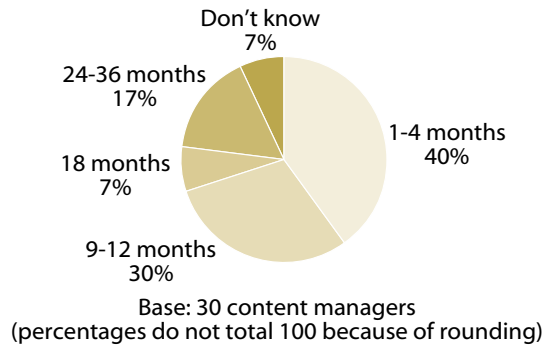
> "We made the decision to replace our homegrown site last month. We now have more authors and editors then when we started, and we desperately need some kind of workflow. We have to coordinate content that targets very different audiences. We have customers, journalists, shareholders, students, and prospects visiting our site." (Electronics company)

> "We started implementing Interwoven's newest version a couple weeks ago. We didn't have a content management product before. Everything we did was in-house. We decided to buy because our system wasn't scalable. We outgrew the old way and had to go with an outside product." (Television network)
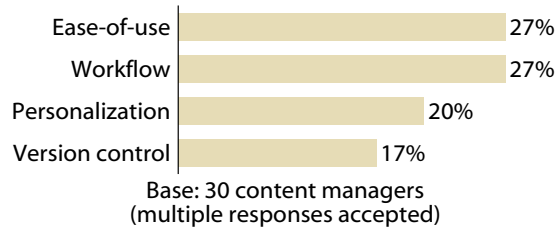
> "We've had an internally developed content management application that we've been using for two years. We haven't bought because most of the stuff on the market was more like tool kits than polished products. Now there is more to choose from -- we just decided to go with a product." (Communications company)

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Figure 1 New Buyers Look For Workflow, Version Control, And Ease-Of-Use

1-1 **"How long have you been using your content management product?"**

Don't know
7%

24-36 months
17%

18 months
7%

9-12 months
30%

1-4 months
40%

Base: 30 content managers
(percentages do not total 100 because of rounding)

1-2 **"What were the primary reasons for selecting your content management product?"**

Ease-of-use 27%
Workflow 27%
Personalization 20%
Version control 17%

Base: 30 content managers
(multiple responses accepted)

Source: Forrester Research, Inc.

Three Vendors Lead The Pack

Seventy-seven percent of interviewees that bought a content management system chose Interwoven, Vignette, or BroadVision. Ease-of-use, workflow, personalization, and version control topped the list of expectations that drove users to these products (see Figure 1-2).

"Our industry is regulated heavily by the government. Interwoven has strong workflow and version control, and that's important to us. All the content on our Web site needs to be correct and approved before publishing."
(Insurance company)

"We chose BroadVision because it leverages the skills that business users already have by supporting content creation with popular desktop authoring tools, thus lowering costs and increasing productivity. It streamlined publishing by allowing users to easily track and control complex content projects."
(Electronics company)

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Getting Up And Running Is Hard, But New Owners Already See Benefits

Fifty-three percent of the interviewees that bought content management products told us that installing the products was harder than they expected -- and 40% spent more than $500,000 to get started. But these firms are still happy customers -- 84% rated their content management products as good or excellent. Why? Workflow and easy-to-use tools again top the list.

> "We're surprised about the complexity and the amount of planning required to get to the point of using Interwoven. There is a presentation piece and workflow that need to be developed and engineered -- we are dependent on people who have training in Java. We are just at the beginning stages of using the product, but the process is clear. Upper management's eyes have been opened."
> (Insurance company)

> "When we first launched with Vignette, we were using 3.0, and then we moved to 4.2. Neither gave us a complex enough workflow and notification, so we had to build our own to make it as flexible as we needed. The installation and customization was harder than we expected, but I would give Vignette top marks. The upgrades and its support have been great." (Diversified services company)

Some Firms Want More Personalization And Wireless Support

We asked our interviewees about their expectations of content management products for the future. Although no single feature dominated their responses, personalization and support for wireless devices were mentioned the most frequently.

> "In the future, we would like to see most of our customer support handled over the Web. That means plugging into the latest wireless technology like WAP so we can communicate with customers on various devices, wherever they may be."
> (Travel company)

> "We need personalization to help filter information. We have a very complex site: We sell home appliances, electronics, lawn and garden tools, and clothing. We want to serve product information to customers based on what we know about them so we don't lose them." (Online retailer)

INTERVIEW CONCLUSIONS

From our conversations with new media managers, we conclude that users need products with:

- **Workflow and version control.** Homegrown solutions spell chaos as sites grow. Firms buy products for things like version control, administration, and workflow.

- **Easy-to-use interfaces.** Users say installing these products isn't easy, but they're happy with the efficiencies they get from easy-to-use Web interfaces and tools.

- **Personalization and wireless support.** Companies' future needs are a mixed bag, but many plan to target customers and other visitors anytime, anywhere, and more individually -- using personalization engines and wireless delivery.

RANKING CRITERIA

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Vendor Momentum Matters Most

We assessed each contender based on hundreds of detailed product and vendor characteristics. In this economic environment, Forrester believes that vendor momentum is the most important factor for picking a content management product. But even strong vendors need products that support collaboration and repository management.

FORRESTER'S VIEW OF FIRMS' CONTENT MANAGEMENT NEEDS

Our analysis is based on identifying the relevant decision criteria to help firms build customized product rankings that reflect their needs.[2] To select a content management system, companies should start by looking for vendors that shine at the factors that we consider important:

- **Momentum.** In today's economy companies can't afford to invest in vendors that won't be around for the long haul. To avoid dead-end investments, firms need to bet on vendors with strong financials, market experience, and product commitment, as well as global presence.

- **Collaboration.** Content management requires coordination and collaboration across business units and users -- from everyday Joes to technical Pros involved in the process (see the June 1999 Forrester Report "Creation Tool Strategies").[3] To emphasize the importance of collaboration, firms should increase the weightings of the Workflow, Library Services, and Delegated Administration subattributes underneath the Capabilities attribute.

- **Repository management.** Managing heavy loads of content and user interactions requires an organized, well-administered repository that can also be audited. To reflect the importance of repository organization and management, companies should increase the weightings of the Storage And Archiving subattribute underneath the Capabilities attribute.

- **Metadata.** We weight metadata heavily in several areas of our criteria because so many of our interviewees want to focus on personalizing their site content. Enriching content with structured metadata is critical for supporting search and personalized content delivery.

Content Management Vendors Must Specialize

To help firms build scalable Web sites, content management products should focus on design and integrate with supporting technologies.

- **For creation, publishing, and delivery, partnering is best.** We heavily weight technology partnerships because content management vendors should use strong third-party technologies, where available, for functions like authoring, template creation, personalization, and publishing and delivery.

- **Standards support eases integration.** We weight relevant standards highly in every occurrence in our criteria. Content management products must support XML and Java standards in particular. Proprietary -- or absent -- object models and messaging formats slow down firms' path to launch.

VENDOR ANALYSIS

Forrester Ranks The Market Leaders

Forrester researched top vendors and tested their products in the lab to uncover their strengths and weaknesses. The rankings and each vendor's detailed scorecard are available to clients on Forrester's Web site.

WE RESEARCH THE MARKET LEADERS

To decide which products to research, we apply a consistent selection filter to the contenders based on their momentum and financial status, along with our knowledge of the market.

- **Ranked.** BroadVision, divine, Documentum, FileNET, Gauss Interprise, Interwoven, NCompass Labs, Stellent, and Vignette.

- **Not ranked.** We excluded Macromedia because it has stopped feature development on its Spectra product. We also excluded eBT because its board of directors has advised the complete liquidation of its assets. We have removed Eprise, Mediasurface, and Starbase because their product strategies are in transition and they've been hit the hardest by the economic slowdown. We have archived their scorecards and will consider re-evaluating them in 2002 if their products gain significant momentum in the market.

GO TO FORRESTER'S SITE FOR PRODUCT SCORECARDS

Forrester's TechRankings online research database contains extensive scorecards with detailed data and analysis about the vendors we have evaluated, along with analytical tools for studying and comparing them interactively.

For Forrester's full research and latest rankings in this category, please visit **http://www.forrester.com/TechRankings.** We update the product scorecards and rankings monthly to reflect changes in this rapidly evolving market.

PRODUCT SUMMARIES -- IN ALPHABETICAL ORDER

Below, in alphabetical order by vendor name, are product summaries about each product ranked in this category as of November 2001. This list is the tip of the iceberg: The bulk of the research is online.

BroadVision's One-To-One Publishing 5.5

BroadVision's acquisition of Interleaf's BladeRunner technology gives it strong storage and authoring capabilities. Its XML repository manages workflow and library services, passing content through an adapter to the original One-To-One Publishing repository for presentation, personalization, and delivery. But this is the extent of the two products' integration -- users will experience inconsistent administration and workflow UIs. BroadVision continues to dedicate resources to the product and plans to release a new version of the product in Q4 2001, which will improve the integration of these two repositories. Despite these plans, firms investing in this platform need to consider BroadVision's sharp decline in resources and revenue.

divine's Content Server Enterprise Edition v3.6

Open Market was recently acquired by divine, an Internet incubator turned software company. It will give Open Market's product the financial and company resources it was missing, but the product risks being lost in divine's diverse product line. divine acquired a solid product in Content Server Enterprise Edition 3.6, which runs on leading J2EE application servers from BEA, IBM, and iPlanet. Since the product is built on these application servers, it has strong connection pooling, load balancing, and session management. Its main strengths are in areas like content creation, library services, delivery, and usability.

The product's scores reflect our assessment of the vendor's Content Server Enterprise Edition 3.6, Content Centre, Catalog Centre, Personalization Centre, Marketing Studio, Satellite Server, and Integration Centre.

Documentum's 4i Content Management Platform 4.2

With its roots in document management, Documentum has evolved its product to a Web-content-management solution by embracing the Java standard and integrating with third-party products like application servers and personalization engines from ATG and BEA Systems. This lets the vendor capitalize on its expertise in areas like workflow, library services, and administration, and it makes the product a sound investment for large-scale content management. The vendor has been successful in getting more than 500 of its 1,300 total customer to use its Web content management product.

The product's scores reflect our assessment of the vendor's eContent Server 4.2, Developer Studio 4.2, WebPublisher 4.3, WebCache 4.3, Engagement Server 4.2, Content Personalization Server 4.2, and Documentum Administration 4.2.

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FileNET's Panagon Web Services 3.1, Content Services 5.1, Web Publisher 4.1

FileNET's product -- Panagon Web Services, Content Services, and Web Publisher -- has not fully crossed the bridge from document management to content management. It has solid document management features like library services, repository organization, administration, and workflow, but it doesn't integrate with third-party Web design tools and has weak publishing with no personalization. The vendor's strong revenues, global presence, and experience will support it, though, as it continues to evolve from its document management roots.

Gauss Interprise's Versatile Internet Platform 5e

Thanks to its international presence, Gauss has a fast-growing customer base with some marquee names like USA TODAY and WorldCom. The product excels at metadata administration, content creation, and usability, but its workflow environment is restrictive. Gauss acquired Magellan Software to address this problem, but until its integration is complete, firms will need to draw on the vendor's systems integrator partners like PricewaterhouseCoopers and Deloitte & Touche for tying the products together.

The product's scores reflect our assessment of the vendor's VIP ContentManager, VIP PortalManager, VIP ContentMiner, VIP Intelligent Templates and Forms, and VIP XML Gateway.

Interwoven's TeamSite 4.5

Interwoven has built an impressive customer base thanks to TeamSite's excellent content and template creation tools. The product has a Java interface for distributed authoring, and it integrates with third-party design tools. It tightly manages content interactions through strong version control and check-in and checkout capabilities. Its workflow engine comes with a graphical design UI. The product relies on third-party app servers for content delivery but not for its own functions, such as publishing and repository management. The product's main shortcomings are usability and object integration. It's easy to integrate with the product because it exposes content through a virtual file system, but this doesn't enable deep, object-level integration. For customized implementation, the vendor has important partnerships with systems integrators like Accenture and IBM Global Services.

The product's scores reflect our assessment of the vendor's TeamSite Front-Office, TeamSite Templating, and Open Deploy.

NCompass Labs' Resolution 3.1

In May 2001, Microsoft acquired NCompass Labs, a vendor that built a content management solution for the Windows platform. Microsoft has released NCompass Labs' product as one of its .NET servers and has trained its sales force and customer support groups on it. Forrester is evaluating the new product, Microsoft Content Management Server 2001, during Q4 2001. Since this new product is based on NCompass Labs' Resolution, this scorecard provides a glimpse of Microsoft's upcoming strengths in templating and publishing. But we'll wait and see if Microsoft can improve the product's workflow and scalability.

The product's scores reflect our assessment of the vendor's Resolution Server, Resolution Design Client, Web Publishing Client, and Site Stager.

Stellent's Content Management System 5.0

Stellent has made some solid improvements to the Stellent Content Management System 5.0, including support for Java, tighter workflow management, and integration with third-party personalization engines from Net Perceptions, ATG, and BEA. In addition to these enhancements, the product has distributed content creation through delegated administration, integration with third-party creation tools, user-friendly Web-based UIs, and robust library services. The product's weakness is its scalability -- it has no session management and only limited fault tolerance. Stellent's company resources are not yet at the scale of Vignette or Interwoven, but it continues to grow its revenues and its customer base (it has 1,200 customers for this product). It also has established partnerships with some large integrators like Andersen and EDS, but it has only certified 70 engineers across these integrators. Stellent was formerly known as IntraNet Solutions.

The product's scores reflect our assessment of the vendor's Stellent Content Server and Stellent Content Publisher.

Vignette's V/5 Suite 5.6.2

Vignette has evolved its content management platform from a heavily customized tool kit to a more mature application, with solid features in areas like personalization, publishing and delivery, library services, and administration. The product now runs on J2EE application servers from BEA and IBM, and it relies on these application servers for its performance architecture. Firms will still find that the product's interfaces are inconsistent and complex, and they should expect to invest heavily in the vendor's large professional services organization or in its systems integrator partners, which include Accenture, PricewaterhouseCoopers, and iXL for customization help. Vignette is one of the few vendors in this market that has the resources to support large companies.

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The product's scores reflect our assessment of the vendor's Vignette Content Management Server, Vignette Advanced Deployment Server, Vignette Lifecycle Personalization Server, Vignette Relationship Management Server, Vignette Business Integration Studio, Vignette Collaborative Commerce Server, Vignette Content Aggregation Server, Vignette Content Syndication Server, Vignette Mobile Application Suite, Vignette Multi-channel Communications Server, Vignette Enterprise Application Portal (EAP), and Vignette Solution Accelerators.

M E T H O D O L O G Y

The TechRankings Methodology: Open, Objective, Rigorous

Forrester's TechRankings research combines data from hands-on lab testing and vendor research with strategic market analysis and insight about technology users' needs. The ranking criteria are developed in the open with feedback from users, researchers, and vendors. The market and company data is verified through third parties like customers and partners. Vendors are invited to review their scores and substantiate factual changes.

OUR CRITERIA ARE BUILT ON AN OPEN DEVELOPMENT PROCESS

For completeness, objectivity, and business relevance, the TechRankings criteria are:

- **Built to comprehensively model technical and business success factors.** We model each category by breaking it down into its characteristic attributes. These represent baseline features -- like personalization and legacy integration -- and unique innovations. The criteria also include nontechnical factors like customer support, partnerships, and market penetration.

- **Published to the industry and amended based on value to users.** Forrester solicits feedback on the ranking criteria from academics, vendors, and the market. Our analysts incorporate model changes that help companies select vendors and stay current with market and technology change.

- **Prioritized to reflect real business needs.** After the ranking criteria solidify, the TechRankings team quantifies the relative business importance of each attribute using weightings. Weightings derive from Forrester's strategic market analysis and interviews with technology users.

- **Tailorable to each user's unique business requirements.** TechRankings offers Forrester's view of the importance of each criterion. But it also gives clients the freedom to alter how attributes are weighted, so they can customize rankings to their needs.

Products Get Points For Lab Results, Not Marketing Claims

The scores that a product receives reflect the reality of what it is designed to do, and can with reasonable effort be made to do, in its current release. To ensure this accuracy:

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- **Ranked vendors must subject products to the testing lab.** Products go through two days of intensive laboratory testing. Vendors that do not subject their products to testing are not eligible to be included in TechRankings.

- **Products get points based on what vendors show, not what they say.** Scoring is based on tangible evidence. TechRankings does not consider product futures.

- **Ranked vendors review and can appeal findings.** Each vendor receives its product scorecard for review prior to a ranking's publication. Based on substantiated, documented responses from vendors, Forrester makes corrections.

- **Facts about vendors are verified systematically.** Nonproduct characteristics like the size of a customer base and international support are also scored. Forrester applies due diligence to ensure that this data is reliable by consulting third parties like partners, peers, customers, and public filings.

Rankings Are Updated Continuously As The Market Evolves

The TechRankings findings are kept up-to-date through continuous research and analysis. When a vendor releases a significant new version of a product, we run the new release through lab testing before adding it to the rankings.

OBJECTIVITY STATEMENT

Forrester does not charge vendors in any form to participate in TechRankings, and it tests and analyzes all products in a category using identical, publicly available criteria. Any vendor wishing to be ranked may apply by contacting Forrester's TechRankings research team at either techrankings@forrester.com or +1 617/613-6000.

E N D N O T E S

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1   Microsoft, IBM, and Oracle have all developed strategies to compete in the content management market.

2   Product costs are insignificant relative to implementation and site maintenance costs, but we still include cost data. Users who are sensitive to license fees can increase this weighting relative to others to factor in cost and obtain a customized ranking.

3   Forrester defines Pros as content creators familiar with advanced tools like Microsoft FrontPage, Adobe Photoshop, and Macromedia Dreamweaver. Joes are end users who contribute content through use of standard desktop applications like Microsoft Word, PowerPoint, and Excel.