The Forrester Wave™: Digital Experience Delivery Platforms, Q3 2014

by Stephen Powers, Mark Grannan, and Anjali Yakkundi, July 22, 2014

KEY TAKEAWAYS

Adobe And hybris Are Pioneers, But Overall Completeness And Adoption Is Middling

Forrester uncovered an immature market in which no vendor is a leader. Adobe and hybris offer the most complete options, while IBM and Sitecore aren't far behind. But none of the vendors truly offer an end-to-end solution, and the references we spoke to tend not to leverage an entire vendor's offering.

Companies Want Contextual, Unified Delivery Capabilities For Customer Acquisition

Digital experience delivery capabilities help companies address challenges with providing personalized experiences across channels. Currently, both customer and vendor efforts focus on unified digital experiences in the customer acquisition phase of the customer journey, but they will soon broaden to include customer onboarding and customer service.

Unified Delivery And Data Management Are Key Differentiators

As older technology becomes outdated and less effective, primarily due to siloed delivery and data, unified delivery and data will dictate which providers will lead the pack. Vendors that can provide these data management and unified delivery capabilities position themselves to successfully deliver business-first tools to their customers.

Access The Forrester Wave Model For Deeper Insight

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 from Figure 5. Alter Forrester's weightings to tailor the Forrester Wave model to your specifications.
The Forrester Wave™: Digital Experience Delivery Platforms, Q3 2014

Vendors From A Variety Of Backgrounds Vie To Be More Than A Basket Of Solutions

by Stephen Powers, Mark Grannan, and Anjali Yakkundi
with Chris Andrews, Peter Sheldon, Cory Munchbach, and Steven Kesler

WHY READ THIS REPORT

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.

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Forrester conducted platform evaluations in March and April 2014 and interviewed 11 vendor companies: Acquia, Adobe, Digital River, HP Autonomy, hybris, IBM, Intershop, OpenText, salesforce.com, SDL, and Sitecore.

Related Research Documents

The State Of Digital Experience Delivery, 2014
April 1, 2014

Market Overview: Digital Customer Experience Delivery Platforms
November 26, 2013

TechRadar™ For AD&D Pros: Digital Customer Experience Technologies, Q3 2013
September 3, 2013
COMPANIES BEGIN THE JOURNEY TO UNIFIED DIGITAL EXPERIENCES

A decade ago, companies engaged in a “battle for eyeballs,” spending lots of money driving undifferentiated traffic to their websites under the belief that more was better. Today, companies focus on creating and delivering relevant, cross-channel, contextual experiences critical to the visitor at that moment of their customer journey.1 This isn’t just about marketing; it’s about supporting the entire customer life cycle in a digitally enabled way.

AD&D professionals face an expanding and fragmented ecosystem of technology supporting these contextual experiences. It has led to the “battle for the glass” — among software vendors vying to offer integrated, business-centric tools to create, deliver, measure, and optimize digital (and offline) channels of engagement and push experiences to digital channels of choice.

Integrated, digital experience delivery products built on web content management (WCM) and/or eCommerce foundations aim to support companies in the pursuit of unified, contextual digital experiences.2 Content products typically show strengths in areas like presentation management and basic personalization while eCommerce products’ strengths include transaction management and the supporting business processes behind those transactions.3

Organizational And Technology Silos Place Roadblocks In The Journey

A software company product manager told us: “Our end goal is a common user interface for everything end-to-end. Currently we only have that for the first third of the journey.” Many companies have begun their unified digital experience journey by focusing more on the customer acquisition stages of the journey — discover, explore, and buy — as opposed to the latter stages, which include onboarding and customer service (see Figure 1). Even within those first three stages, companies rarely have a single platform. Why? Though digital experience delivery is a decidedly cross-organizational effort shared between marketing, technology management, lines-of-business, and sales, working across organizational boundaries isn’t easy.4 In fact, 60% of respondents to our recent survey said dividing roles and responsibilities between marketing, technology management, and the business was their top challenge (see Figure 2).

These organizational silos have created challenges for implementing digital experience delivery technology. Individual groups have sourced tools on a project-by-project basis, creating system redundancies. The term “technical debt” came up frequently in our reference interviews, as customers pointed out the increasing costs of overlapping or redundant technologies over time. More importantly, this approach has created integration challenges and siloed customer data insights.
Figure 1 The Customer Life Cycle Supports Delivery Of A Complete Experience
Figure 2 Companies Face Challenges Sharing Digital Experience Responsibilities

“When it comes to roles for digital experience projects, which have been the biggest pain points?”
(Select the top three)

- Dividing roles/responsibilities among marketing, IT, and the business: 60%
- Shortage of appropriate skill sets: 58%
- Funding/budget: 51%
- Finding the right third party: 31%
- Dividing roles/responsibilities between internal groups and third parties: 30%
- Hiring the right candidate (e.g., cultural fit): 14%
- Training: 6%
- Other (please specify): 5%

Base: 148 digital customer experience decision-makers

Source: Forrester’s Q1 2014 Digital Experience Delivery Online Survey

THE TRULY UNIFIED PLATFORM: STILL MORE MYTH THAN REALITY

Given current customer needs, most of the vendor focus in this market has been on unifying the digital experience for the customer acquisition phase of the life cycle. In this context, vendors have aggressively acquired best-of-breed products related to digital experience (see Figure 3).

But vendors in this market still have significant work to do. Specifically:

- **Vendors have functionality gaps and many customers don’t want a one-stop shop.** No vendor has acquired or built all the parts to create a single, unified digital experience platform for customer acquisition, though some are closer than others. In addition, companies have already made significant investments in digital experience technologies and aren’t willing to throw away those investments in favor of a single-vendor solution. These companies want a delivery backbone — based on commerce and/or content functionality that they can easily integrate with other products, like analytics and social. An executive in charge of digital experience technology at a multibrand global manufacturer told us, “It’s still a best-of-breed world. Nobody is going for one-stop solutions. It’s not about breadth; it’s about depth in a certain function.”
■ **Vendors’ integration of acquired products lags in maturity.** All vendors in this report are lagging in some respect in terms of integrating their disparate tools. Integration among products within a single vendor’s portfolio includes functionality (sometimes overlapping), user interfaces, and data so that companies can leverage it to drive personal, relevant digital experiences. Some vendors, like Adobe, have made significant progress integrating user interfaces for a single look and feel for their tools. IBM has made progress eliminating overlapping functionality and standardizing on certain functions across products. However, the integration and accessibility of back-end data repositories across solution sets remains nascent at best for most vendors.

■ **Third-party software integration falls far short of needs.** Vendors often partner with best-of-breed providers to fill gaps in areas such as digital asset management (DAM), analytics, and testing and optimization. However, they have a liberal definition of “integration.” It may mean a loose go-to-marketing or reseller partnership dependent on field integrations; basic API-level integrations; or deeply engineered integrations in which third-party capabilities work seamlessly with the core platform. One interviewee diplomatically made the need for improvement clear when asked about integrations from their vendor, “The integrations are very good. And we’re working to make them even better.” Buyers must consider the maturity of newly announced integrations; often, “announced” capabilities equate to “beta” capabilities and may not be ready for general use.

■ **Customer acquisition does not equate to customer journey.** As mentioned above, most of the focus has been on the customer acquisition phases of the digital life cycle rather than on the complete customer journey. But in the next several years, customer acquisition technologies will mature and consolidate. Then, Forrester expects clients to focus more on unifying the digital customer acquisition technologies with those supporting the latter phases of the customer journey, like onboarding and customer service. Vendors will expand their definition of “digital experience,” and those who own technologies supporting more of the journey will have an advantage.
Content And Commerce Products Aren’t Converging As Quickly As You Might Think

Both content and commerce platforms offer management of content and active delivery of web experiences. But they have major differences as well: Commerce platforms cater to those who need support for product management, merchandising, complex transactions management, and mature back-end business processes, while content vendors offer more user-friendly tools for marketers to quickly create personalized web and mobile web presentations, as well as deeper unstructured content management capabilities. eCommerce vendors such as hybris (SAP) have viable WCM capabilities embedded within their platforms, while some WCM vendors offer basic shopping capabilities. But no one currently offers a unified, best-of-breed solution for both. Given the different use cases involved and acquisitions that have already occurred, we don’t expect to see that unified offering soon. Instead, expect many of the vendors to focus on strategic partnerships to offer integrated but separate tool sets.
DIGITAL EXPERIENCE DELIVERY EVALUATION OVERVIEW

Forrester evaluated each vendor against 29 criteria, categorized into the following three areas:

- **Current offering.** We looked at the core capabilities (e.g., content, commerce, or data) and specialized components (e.g., testing/optimization) that each vendor has assembled organically or via partnership to serve as the foundation for a digital experience platform. We focused significantly on integrations that deliver benefits such as unified user access, common data models, shared content assets for use across channels, and common reporting and analytics.

- **Strategy.** We evaluated each vendor’s vision for their platform, and their customers’ use of the platform. In addition, we investigated each vendor’s commercial partnership strategy, services partner ecosystem, release cycle, and delivery model.

- **Market presence.** We evaluated the size of each platform’s current enterprise client base, while also factoring in overall corporate revenue, revenue growth, employee base, and geographic footprint.

**Vendor Selection Criteria**

Forrester included 13 vendors in our evaluation of the digital experience delivery platform market including: Acquia, Adobe, Demandware, Digital River, HP Autonomy, hybris, IBM, Intershop, OpenText, Oracle, salesforce.com, SDL, and Sitecore. Oracle and Demandware chose not to fully participate in the process, so we placed these platforms in the Forrester Wave™ based on our knowledge of each solution set from past analysis and publicly available information so as to provide a complete picture of the competitive landscape. While this market is immature, these 13 vendors represent the strongest that the market has to offer in terms of stability, functionality, and experience providing a primary enterprise product supporting on-site experiences. Each vendor in the evaluation (see Figure 4):

- **Offers a core capability, which can be extended via additional tools.** Each vendor platform includes foundational capabilities that can deliver digital experiences and can be extended via additional modules, solutions, integrations, and customization.

- **Provides integration capability between owned and third-party products.** Each platform has a minimum level of open standards support to enable integration with legacy systems and other digital experience delivery solutions.

- **Showcases referenceable customers at the enterprise level.** Each vendor must be able to provide referenceable enterprise customers (companies with $1 billion or more annual revenue) to attest to the platform’s general availability and viability.
- **Demonstrates minimum annual revenue of $75 million (USD)**. Each vendor must have the ability to invest in ongoing product development, has longevity in the marketplace, and has a proven revenue track record with large enterprises.

- **Generates interest from Forrester clients**. Each vendor’s solutions must generate interest from Forrester’s client base via our inquiry process or other interaction channels.
### Figure 4 Evaluated Vendors: Vendor Information

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Product(s) evaluated</th>
<th>Platform Components (if sold separately)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acquia</td>
<td>• Drupal 7&lt;br&gt;• Acquia Cloud&lt;br&gt;• Acquia Search</td>
<td></td>
</tr>
<tr>
<td>Adobe</td>
<td>Adobe Marketing Cloud 14.3.1</td>
<td>• Adobe Experience Manager 5.6.1&lt;br&gt;• Adobe Analytics 1.4.1&lt;br&gt;• Adobe Social 3.2.1&lt;br&gt;• Adobe Target 3.9.1&lt;br&gt;• Adobe Campaign 6.1.1</td>
</tr>
<tr>
<td>Demandware</td>
<td>Demandware Commerce</td>
<td></td>
</tr>
<tr>
<td>Digital River</td>
<td>Digital River Global Commerce</td>
<td></td>
</tr>
<tr>
<td>HP Autonomy</td>
<td>Autonomy Marketing Cloud (announced June 12, 2013)</td>
<td>• HP Marketing Performance Suite&lt;br&gt;• HP Digital Marketing Hub version 1.0&lt;br&gt;• HP TeamSite version 7.4.1&lt;br&gt;• HP ExploreCloud version 4.5&lt;br&gt;• HP MediaBin version 8.1&lt;br&gt;• HP IDOL version 10.5&lt;br&gt;• HP Optimost 5.8&lt;br&gt;• HP Customer Communications Management Suite&lt;br&gt;• HP Exstream 8.6</td>
</tr>
<tr>
<td>hybris (SAP)</td>
<td>hybris Commerce Suite 5.1</td>
<td></td>
</tr>
<tr>
<td>IBM</td>
<td>IBM ExperienceOne (announced May 13, 2014 and was not evaluated as a unified platform)</td>
<td>• IBM WebSphere Commerce 7&lt;br&gt;• IBM Experience Suite Rich Media 8.001&lt;br&gt;• IBM Marketing Center 9.1&lt;br&gt;• IBM Campaign 9.1&lt;br&gt;• IBM Interact 9.1&lt;br&gt;• IBM eMessage 8.2&lt;br&gt;• IBM Tealeaf 8.8&lt;br&gt;• IBM Xtify (SaaS no version)&lt;br&gt;• IBM Marketing Operations 9.1&lt;br&gt;• IBM Digital Analytics</td>
</tr>
<tr>
<td>Intershop</td>
<td>Intershop 7.4</td>
<td></td>
</tr>
<tr>
<td>OpenText</td>
<td>OpenText Experience Suite 10.5 (announced April 9, 2014)</td>
<td>• OpenText Web Experience Management 8.5&lt;br&gt;• OpenText Media Management 7.2&lt;br&gt;• OpenText Tempo Social 8.3&lt;br&gt;• OpenText Campaign Management</td>
</tr>
<tr>
<td>Oracle</td>
<td>• Oracle Marketing Cloud&lt;br&gt;• Oracle CX Commerce</td>
<td></td>
</tr>
<tr>
<td>salesforce.com</td>
<td>ExactTarget Marketing Cloud</td>
<td></td>
</tr>
<tr>
<td>SDL</td>
<td>SDL Customer Experience Cloud (announced January 27, 2014)</td>
<td>• SDL Social&lt;br&gt;• SDL Web Content Management&lt;br&gt;• SDL Campaings&lt;br&gt;• SDL eCommerce&lt;br&gt;• SDL Analytics</td>
</tr>
<tr>
<td>Sitecore</td>
<td>• Sitecore Experience Platform 7.1&lt;br&gt;• Sitecore Commerce Server</td>
<td></td>
</tr>
</tbody>
</table>

Source: Forrester Research, Inc.
THE RESULTS: AGGREGATION VENDORS FIGHT ALL-IN-ONES FOR SUPREMACY

The digital experience delivery market is nascent, and as such there were no clear leaders in our evaluation (see Figure 5). The content products generally offer minimal embedded commerce capabilities, and integration with dedicated commerce solutions is clearly not yet seamless. Conversely, most commerce products don't offer as much functionality as their content counterparts for supporting marketing needs. And both types of products don't have enough functionality for leveraging data for contextual experiences, particularly when that data lives in a third-party repository. However, the Strong Performers and Contenders in our study have made a good deal of headway in support of digital customer acquisition:

- **Aggregation strategies appear mostly promising.** Adobe is making the greatest strides on the technical integration of acquisitions, with a vision for a common architecture and user interface. IBM and Oracle have repackaged their deep bench of products into more coherent digital marketing offerings. HP Autonomy, OpenText, and SDL have digital experience technology portfolios as well, but not as broad as the first three mentioned, and functionality gaps and/or shortcomings in corporate strategy exist. While its marketing-centric strategy differs from the rest, salesforce.com acquired ExactTarget and is now integrating it with other products in the salesforce.com portfolio, such as Radian6 and Buddy Media. However, clients told us that integrations for evaluated vendors are nascent.

- **Strongest all-in-one offerings can punch above their weight with partnerships.** Vendors who build rather than buy capabilities generally include integration from the start, but this approach can limit commercial and technical flexibility. Sitecore and hybris have built strong offerings and partnered to fill in functionality gaps. (Sitecore's acquisition of CommerceServer.net is a notable exception to its all-in-one strategy). SAP acquired hybris, but recent developments suggest SAP wants to leave hybris as an independent entity, except where Hana integration makes sense. The commerce-centric vendors Demandware, Digital River, and Intershop provide software partner marketplaces to broaden their footprints and assist in integration efforts. However, for these commerce-centric platforms, revenue share pricing models can prove more limiting than the functionality itself. Acquia, which specializes in services for the Drupal WCM product, has integrated offerings for commerce and testing and optimization, and it touts its open-source roots as a further benefit for integrating third-party products.

This evaluation of the digital experience delivery platform market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool, downloadable from forrester.com.
Figure 5 Forrester Wave™: Digital Experience Delivery Platforms, Q3 ‘14

For Risky Bets, Contenders, Strong Performers, and Leaders, the figure shows a matrix with:

- Current offering: Weak to Strong
- Market presence: Full vendor participation to Incomplete vendor participation

Vendor placement includes:
- Adobe
- hybris (SAP)
- Sitecore
- IBM
- Oracle
- Intershop
- salesforce.com
- Digital River
- OpenText
- HP Autonomy
- Acquia
- Demandware
- SDL

Source: Forrester Research, Inc.
**Figure 5** Forrester Wave™: Digital Experience Delivery Platforms, Q3 ’14 (Cont.)

<table>
<thead>
<tr>
<th>CURRENT OFFERING</th>
<th>Forrester's Weighting</th>
<th>Acquia</th>
<th>Adobe</th>
<th>Digital River</th>
<th>HP Autonomy</th>
<th>hybris</th>
<th>IBM</th>
<th>Intershop</th>
<th>OpenText</th>
<th>salesforce.com</th>
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<th>Sitecore</th>
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<td>3.00</td>
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<td>Content and presentation deployment</td>
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<td>Personalized delivery and optimization</td>
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<td>Globalization/localization</td>
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<tr>
<td>Reporting and digital analytics</td>
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<td>1.90</td>
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</tr>
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</table>

| STRATEGY                                      | 50%                   | 1.95   | 3.40  | 1.55         | 1.55        | 3.65  | 2.50| 2.15     | 1.95     | 2.05           | 1.95 | 2.50     |
| Vision                                        | 35%                   | 2.00   | 4.00  | 2.00         | 2.00        | 4.00  | 3.00| 2.00     | 2.00     | 2.00           | 2.00 | 2.00     |
| Execution and enterprise track record          | 35%                   | 1.00   | 3.00  | 1.00         | 1.00        | 3.00  | 2.00| 2.00     | 2.00     | 2.00           | 2.00 | 3.00     |
| Critical software integrations                 | 5%                    | 3.00   | 3.00  | 3.00         | 2.00        | 3.00  | 2.00| 3.00     | 3.00     | 3.00           | 3.00 | 3.00     |
| Services partner network                      | 10%                   | 1.00   | 5.00  | 0.00         | 1.00        | 5.00  | 3.00| 1.00     | 1.00     | 1.00           | 1.00 | 3.00     |
| Professional services                          | 0%                    | 0.00   | 0.00  | 0.00         | 0.00        | 0.00  | 0.00| 0.00     | 0.00     | 0.00           | 0.00 | 0.00     |
| Cost structure                                 | 0%                    | 0.00   | 0.00  | 0.00         | 0.00        | 0.00  | 0.00| 0.00     | 0.00     | 0.00           | 0.00 | 0.00     |
| Release cycle                                  | 5%                    | 5.00   | 0.00  | 5.00         | 0.00        | 5.00  | 0.00| 5.00     | 0.00     | 0.00           | 0.00 | 0.00     |
| Delivery model                                 | 10%                   | 4.00   | 3.00  | 2.00         | 3.00        | 3.00  | 3.00| 3.00     | 3.00     | 3.00           | 3.00 | 3.00     |

| MARKET PRESENCE                                | 0%                    | 1.40   | 3.20  | 1.60         | 3.30        | 2.20  | 3.40| 1.40     | 3.20     | 2.30           | 2.70 | 1.80     |
| Installed base                                 | 60%                   | 1.00   | 3.00  | 1.00         | 3.00        | 1.00  | 3.00| 1.00     | 3.00     | 1.00           | 3.00 | 1.00     |
| Revenue                                        | 10%                   | 1.00   | 5.00  | 3.00         | 5.00        | 5.00  | 5.00| 5.00     | 5.00     | 5.00           | 3.00 | 3.00     |
| Revenue growth                                 | 10%                   | 5.00   | 1.00  | 1.00         | 0.00        | 3.00  | 1.00| 3.00     | 3.00     | 4.00           | 2.00 | 5.00     |
| Employees                                      | 10%                   | 1.00   | 3.00  | 1.00         | 5.00        | 3.00  | 5.00| 1.00     | 1.00     | 3.00           | 1.00 | 1.00     |
| Locations                                      | 10%                   | 1.00   | 5.00  | 5.00         | 5.00        | 5.00  | 5.00| 5.00     | 5.00     | 5.00           | 3.00 | 3.00     |

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

Source: Forrester Research, Inc.
VENDOR PROFILES

Strong Performers

Adobe's content management and targeting products form the backbone of its capabilities.
San Jose, California-based Adobe has leveraged acquisitions from Day Software and Omniture among others to establish a platform with a broad array of functionality. Its digital experience delivery capabilities include WCM, DAM, targeting, and social. Adobe embeds these as part of a “marketing cloud” that also includes analytics, media optimization, and campaign management. It has a common user interface across most of these components (campaign management, acquired from Neolane, is currently the notable exception). Data management is a work-in-progress; Adobe announced earlier this year its “master marketing profile” which offers a single view of the customer across its solutions, but it was not available at the time of evaluation. Adobe's biggest gap is its lack of commerce offering. Instead it has formal partnerships in various stages with hybris, Intershop, and Elastic Path, as well as unofficial commerce integrations developed by third-party systems integrators (SIs). The hybris integration, currently the longest-standing, gets mixed marks from customers, while the other two supported integrations don’t currently have live referenceable customers.

Strategically, Adobe differentiates with its vision of the connective tissue between its tools, and its aim for single customer profile. However, like most of the other vendors in this report, Adobe doesn't provide a complete tool set across its solutions for importing and exporting data. Another area for improvement: integration. Customers report that integration between Adobe components still needs work, and third-party integrations are mainly limited to commerce. Other potential drawbacks include the high costs, complexity (a technology VP at a conglomerate told us, “Adobe can be a really powerful tool if you set it up right, but you have to know what you're doing to get this up”), and a fragmented sales/support model among the different products. Adobe is the best fit for companies with sophisticated needs requiring best-of-breed solutions, and who have the budget to support them.

hybris (SAP): an eCommerce vendor with strong digital experience aspirations. Munich, Germany-based hybris is an eCommerce-based vendor with potential to rival Adobe. It has been a dominant force in the eCommerce space for many years and complements this base with solid functionality across other digital experience areas, including WCM, product information management, analytics, and testing and optimization. hybris doesn't have the portfolio breadth of some of the other evaluation's Strong Performers, such as Adobe and IBM. It is weak in areas such as social depth and DAM. SAP, which acquired hybris last year, offers a best-of-breed campaign management tool, but integration with the hybris platform is currently nascent at best.

hybris has a particularly strong vision, which includes optimizing the entire customer journey, not just digital, and integrating internal and external tools. We particularly liked the attention paid to internal business processes (a natural strength of commerce vendors when compared with content vendors), not just external experiences. Like others in this evaluation, hybris' current data
functionality only addresses the issues of third-party data in a limited way. However, the potential to integrate hybris with SAP’s Hana could give the vendor the potential to aggregate DX data from multiple sources and serve hyper-personalized experiences. Though Adobe is currently a partner, in the long term we expect hybris (SAP) to wind up as a formidable competitor.

- **Sitecore aims to provide an all-in-one solution, augmented by a commerce acquisition.**
  Copenhagen, Denmark-based Sitecore offers a platform that combines its WCM and digital marketing system solutions, which it now sells as a single product. Sitecore’s solution also includes email campaign management, personalization, testing/optimization, and social capabilities, though these are not considered best-of-breed. Unlike many others evaluated, Sitecore’s products are fully integrated with the exception of CommerceServer.net, which it acquired in November 2013. The integration of CommerceServer.net is currently in progress. Customers spoke positively about the services and strategy help that Sitecore offers, but the same customers hesitated to praise the personalization functionality (one customer indicated there’s a robust offering, but a steep learning curve).

  Sitecore has a marketing-centric vision based on leveraging data from all Sitecore-supported customer touchpoints in order to build a 360-degree customer view. Its vision on the connective tissue of tooling and leveraging data is particularly strong, though we’d like to see Sitecore embrace third-party data as well. As a one-stop shop, Sitecore has less incentive for integrations with third-party products, and this is reflected in its road map. Sitecore has a good relationship with several service partners around the globe, who claim to have deep Sitecore competencies. The price point for Sitecore is on the lower end of the spectrum compared with other Strong Performers in this Forrester Wave evaluation, though is still high enough that one customer felt “locked in” due to the high capital investment.

- **IBM wields its acquisition power as it builds a broad digital experience portfolio.** Armonk, NY-based IBM has exhibited strong ambitions for digital experience delivery by bulking up its technology portfolio via acquisitions of Coremetrics, Sterling Commerce, and Unica, among others, to complement core commerce and content offerings. IBM’s broad set of functionality also includes portal, product information management (PIM), analytics, and other marketing tools. IBM, however, still has a number of areas to improve on, particularly in unified business user interfaces across the tool sets, content and presentation deployment, and personalized delivery and optimization across solutions. Like many other aggregation vendors, IBM still has work to do on integrating its products together; one customer told us that the offering feels “cobbled together,” while another praised the volume of functionality but pointed out, “it still demands a lot of effort to build.” IBM needs to continue to build its existing partnerships with vendors that offer best-of-breed products (e.g., its original equipment manufacturer [OEM] relationship with MediaBeacon for DAM).
IBM’s clear strength is how it defines digital experience delivery much more broadly than many of the vendors in this report, emphasizing both customer-facing experience and employee experience. It will be well-positioned to expand its digital experience capabilities beyond just customer acquisition to include functions like onboarding and service and support. Another key part of IBM’s strategy: its services branch, IBM Interactive Experience, which acts as a digital services firm for strategic, design, development, and implementation services. IBM must continue to evolve strategies to integrate its tool sets, and deeper integration with third-party tools. IBM must also continue to invest in agency partnerships — outside of IBM Interactive Experience and OgilvyOne, it lacks the same level of big-name agency partners as some of the other vendors evaluated here. IBM is best fit for companies that have existing IBM relationships and products and that look to expand digital strategies beyond marketing and customer acquisition.

**Contenders**

- **Acquia has yet to realize its potential.** Burlington, Massachusetts-based Acquia leverages the open source Drupal product to build a digital experience delivery business by providing enterprise-scale support, hosting, advice, and other services. Its strengths are in the areas of WCM and social depth tools. But little of the rest of Acquia’s functionality – such as commerce and optimization – truly stands out from other vendors in this evaluation. It does promote the idea of integrations with third-party products rather than pushing its solution as the answer to all digital experience delivery problems. But we have not yet spoken with any references who have done extensive integrations with third-party products.

  Acquia’s stated vision is to offer content, commerce, and community tools as a digital experience foundation for unified experiences across multiple platforms. Acquia’s vision is differentiated in the areas of integration and data. But Acquia customers we spoke to as part of this research have deployments that are nascent and more limited in scope when compared with other vendors included in this report. Customers we spoke to are taking only limited advantage of integration capabilities. Acquia’s relationships with agencies is also weaker compared with other vendors offering digital experience platforms, so potential buyers should be very clear on where they will source outside help before they seriously consider Acquia. But given its lower price point and that not all customers have the ability to take advantage of the level of functionality that a vendor like Adobe offers, Acquia has the potential to play a significant role in the digital experience delivery market.

- **Demandware’s B2C commerce focus and pricing model makes it most relevant to retail.** Burlington, Massachusetts-based Demandware has a 10-year track record as an enterprise business-to-consumer (B2C) eCommerce solution. Demandware has a tight commerce focus and software-as-a-service (SaaS) delivery, a common data layer, common user interface, and common API set (minus the recent Mainstreet Commerce acquisition). Demandware’s data extensibility has room for improvement including native support for two-way data flows to external databases. Given its SaaS delivery model and revenue-sharing-only commercial model, Demandware’s
multichannel delivery relies more heavily on its Link technology marketplace to extend its functionality beyond eCommerce (with basic WCM, embedded PIM, basic testing/optimization, and basic social depth available). In these primarily one-way relationships, Link partners build integration accelerator solutions, Demandware certifies and then distributes the plug-ins to extend multichannel distribution beyond the Web and include more back-end data and content sources.

Demandware’s strategy is tightly focused on B2C commerce. It continues investing into this space with its recent order management system acquisition of Mainstreet Commerce and is building out its own infrastructure to support increasingly global demand. Demandware’s services partner network (Link solution partners) include some global players including Accenture, Razorfish, SapientNitro, and Cognizant. Demandware is most relevant to those in the retail space who want to build out their broader digital experience delivery capabilities centered on commerce, as opposed to a broader platform supporting more of the customer life cycle. Note that Demandware did not participate in the research for this report, so Forrester based its findings on past briefings, products demos, and customer reference interviews.

- **Digital River runs deep on commerce, but needs more content–driven experience support.** Minnetonka, Minnesota-based Digital River has been in the eCommerce space for 20 years, differentiating from its primary commerce competition by acting as the merchant of record on behalf of clients. The platform is built from the following standalone products: Global Commerce (for eCommerce, PIM, search, basic testing/optimization, basic DAM, basic WCM, and basic social depth) and BlueHornet (for basic cross-channel campaign management [CCCM]). Given the limited scope of the Digital River platform — combined with the fact that the solution is 100% SaaS — core traits are strong: a common UI, data layer, reporting/analytics, and release cycle. However, while touting broad global commerce support, the platform does little to meet content localization workflows. Additionally, Digital River’s data extensibility capabilities are modest and primarily focus on pulling data into its solution.

Digital River’s strategy is focused on holding its course as a deep, SaaS-based eCommerce offering, supported primarily by in-house marketing services teams. External integrations to other software solutions are limited to a few partnerships for social depth (Bazaarvoice) and single sign-on (Janrain), but the remainder fall into the field-integration category. Digital River’s services partner relationships are currently limited, but it has stated it is developing deeper implementation partner relationships with Accenture and Deloitte. Digital River remains a good fit for midlevel enterprises focused on commerce that are amenable to a semi-walled-garden approach for their eCommerce needs.

- **HP Autonomy needs to focus beyond data.** Several years ago, Palo Alto, California-based HP acquired Autonomy, a vendor with an 18-year track record in the enterprise content management space. Its digital experience delivery functionality includes WCM, DAM, testing and optimization, and basic cross-channel campaign management. eCommerce and PIM capabilities are available via basic integrations with hybris and Digital River. HP’s strengths
include individual components like DAM, CCCM, and testing/optimization, where it’s begun experimenting with more real-time and predictive capabilities. HP’s Exstream customer communications management product, which can support customer onboarding, offers capabilities beyond customer acquisition. But HP Autonomy’s platform lacks cohesiveness among the various products, with no common UI or data layer. HP’s customers cite the “overly customizable” nature of the large offerings, which slowed implementation and integration efforts especially where cross-solution documentation and support was lacking.

HP Autonomy is a vendor in flux, trying to absorb multiple acquisitions and attempting to remain relevant in a market where many of its implementations are legacy. Its strategy increasingly focuses on data and analytics built from multichannel customer behavior, but it does not have sophisticated integration to its content management and delivery capabilities. Its partner story is weak. Software partners include hybris, Digital River, salesforce.com, and Marketo, but we see limited evidence of co-development, indicating a potential lack of depth of these relationships. HP’s services partner ecosystem is relatively broad, but most partners report that their HP Autonomy services focus on maintenance and support of legacy systems rather than new implementations. HP Autonomy is best fit for existing HP customers and content-centric enterprises with large, complex requirements that demand heavy customization.

- **Intershop vies to be a flexible platform, but marketing tools lack maturity.** A stalwart in the eCommerce space, the Jena, Germany-based company complements a top-of-the-line commerce platform with relatively rudimentary marketing tools. WCM, campaign management, PIM, DAM, testing, and social capabilities are native to the Intershop 7 platform, but some of these tools lack the maturity of other products on the market. As a single-solution offering, Intershop stands out through a consistent user interface across nearly all of its platform components, and embedded capabilities for both personalization and analytics that are necessities for data-driven marketers.

Intershop strives to provide an agile platform that enables business users to model and configure a seamless customer journey across all touchpoints. But despite deep roots in eCommerce, Intershop’s efforts to branch out into the marketing field are not mature. Intershop boasts partnerships with best-of-breed content and analytics providers, though enterprise-level customers leveraging these integrations are few. Intershop has recently partnered with Adobe, and the two companies have embarked on developing reference integration between the Intershop platform and Adobe’s Experience Manager. A lack of diverse regional market share works against Intershop in the fight for big-name clients, as more than 80% of its customers are based in Western Europe and can claim just a few dozen total customers in North America. However, a relatively low price point is a bright spot.

- **OpenText’s platform focuses on content and process, but continues to be siloed.** Waterloo, Ontario-based OpenText has more than 20 years’ experience in the enterprise information, content, and process management software markets. OpenText’s platform spans functionality across WCM, DAM, campaign management, social depth, and PIM.
Given its lack of eCommerce functionality, OpenText has begun to invest in partnerships with hybris, Oracle Art Technology Group (ATG), Elastic Path, and Demandware, though these nascent integrations have yet to gain an enterprise track record. Unsurprisingly given its background, OpenText’s strengths are in its core business process management and content management capabilities. But it currently lacks a common UI and data access layer.

OpenText’s strategy looks to build on existing enterprise strengths surrounding business process, portal, and information management. This makes sense in light of customer references that cited OpenText’s applicability to very large, on-premises, content-centric, and complex environments. OpenText has a history of supporting employee-centric experiences over customer-centric ones; it needs more buy-in from digital agencies that are conspicuously missing from OpenText’s SI-centric partner ecosystem. OpenText is best fit for organizations where technology management groups are leading the charge and have established OpenText relationships due to heavy content and process needs.

- **Oracle drives big, but still unfulfilled, vision across commerce, content, and campaigns.**

  Redwood Shores, California-based Oracle has been particularly aggressive in acquiring components for its digital experience delivery platform. Its offering includes commerce and content components — acquired from ATG, Endeca, and FatWire Software complemented by others including marketing automation, customer relationship management (CRM), and cross-channel campaign management. Many individual components are strong, particularly eCommerce. Overall, Oracle has well-rounded features in areas like targeting and contextualization, customer interaction tools, and search. However, Oracle has some work to do in leveraging all its acquisitions. Integration between the various products is still in progress. Oracle also must continue to invest in areas like unified data capabilities, unified UIs, and globalization/localization.

  Oracle’s products are capable of supporting a broader customer life cycle, not just customer acquisition. Oracle has a large hurdle to overcome in realizing its multiple acquisitions. Like many vendors in this Forrester Wave evaluation, it has not fully integrated multiple tool sets. Oracle also seems to have prioritized commerce investments over content ones; Oracle has been investing in the experience management tools embedded in Oracle Commerce rather than the standalone content product. While Oracle boasts a number of traditional systems integrators and IT consultancy partners, it needs to continue to invest in partnerships with digital agencies that often do implementation work. Oracle is a best fit for organizations with a strong existing Oracle relationship and for those focused heavily on commerce-driven use cases. Oracle did not participate in the research for this report, so Forrester based its findings on past briefings, products demos, and customer reference interviews.

- **salesforce.com’s digital experience capabilities are more vision than reality.**

  San Francisco, California-based salesforce.com acquired ExactTarget last year and is leveraging it as a centerpiece of its Salesforce1 customer platform. Unlike others in this evaluation, salesforce.com does not have its own delivery tier; rather it aims to embed and optimize content regardless of platform. While this may seem like an odd fit for a digital experience delivery evaluation,
salesforce.com's vision laid out last fall — to create a platform to sell, service, and market — plus its market presence make it an interesting player. However, salesforce.com's vision, in its executive briefing with Forrester, encompassed no more than ExactTarget marketing's capabilities, as opposed to the broader Salesforce1 vision presented at its Dreamforce event in 2013, which included a much broader customer life cycle, mobile, and development story.

The ExactTarget platform itself has strengths: a slick business user interface, a journey builder tool, and multichannel delivery. The surprising weaknesses? Integration with other products in the salesforce.com portfolio, such as CRM and Force.com (its website publishing solution). Globalization and localization of content also is a weakness, but salesforce.com does not specialize in unstructured content (unlike virtually all the others mentioned in this report), so this is less surprising. Ultimately, salesforce.com has a lot of important pieces of the digital experience delivery platform, but without a more coherent, integrated story, it will fare better at selling those individual components, rather than being the centerpiece of a more cohesive platform.

- **SDL shows promising functionality but lags on strategic vision.** UK-based SDL launched its Customer Experience Cloud packaging in January to unify its collection of digital experience delivery products. This includes SDL's language translation and localization tools along with products gained via acquisitions of Tridion (WCM); Alterian (cross-channel campaign management); Fredhopper (search and targeting); Calamares (media management), and Trisoft, LiveContent, and XyEnterprise (documentation). SDL's WCM tools in particular offer strong capabilities. Its BluePrinting capabilities, which support managing global and local content and presentation elements and are integrated with its translation services, are a major differentiator. Areas of improvement include user interfaces, as some products like Fredhopper still have independent UIs, data management, and contextualization, which need more predictive and automated outside-of-commerce use cases. SDL also lacks an eCommerce solution, and it has relied on weak partnerships with other vendors.

SDL's biggest challenge is strategy. SDL has traditionally managed its products in silos. Like many vendors in this Forrester Wave evaluation, SDL must bridge (both strategically and technically) the different components of its Customer Experience Cloud. SDL also has much work to do on its partner ecosystem — it lacks established partnerships and integrations with other best-of-breed technology vendors. While it has begun to develop some partnerships — such as with North Plains Systems for DAM — these partnerships are still nascent; some are, at first glance, mostly just partnerships in name only. SDL also lags behind many other vendors in agency and systems integrator partnerships, creating a challenge for its customers who need to find a partner with deep experience in the SDL tool set. SDL is a best fit for organizations looking to support global, non-transactional digital experience delivery initiatives with heavy localization needs.
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 two data sources to assess the strengths and weaknesses of each solution:

- **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 at least 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. For more information on the methodology that every Forrester Wave follows, go to http://www.forrester.com/marketing/policies/forrester-wave-methodology.html.
Integrity Policy

All of Forrester’s research, including Forrester Wave evaluations, is conducted according to our Integrity Policy. For more information, go to http://www.forrester.com/marketing/policies/integrity-policy.html.

ENDNOTES

1 Organizations have long personalized their websites for customer segments. Now they need to go further, first by delivering the right experience to the right user at the right time and on the right device and next by delivering relevant, tailored experiences that meet individual user needs by combining historical, behavioral, and profile data with real-time situational feedback. See the January 13, 2014, “Advance To Next-Generation Personalization” report.

2 Ultimately, WCM tools are no longer just about managing web content. Instead, they have evolved to become the cornerstone of an ecosystem of tools that support digital experiences for customers. See the April 8, 2013, “The Forrester Wave™: Web Content Management For Digital Customer Experience, Q2 2013” report and see the October 7, 2013, “The Forrester Wave™: B2B Commerce Suites, Q4 2013” report.

3 Companies need cohesive digital customer experiences, but marketing and eCommerce groups often operate in silos with differing objectives, which leads them to buy and operate independent solutions for brand content and transactions. See the November 19, 2013, “Content And Commerce: The Odd Couple Or The Power Couple?” report.

4 Forrester recently surveyed 148 technology, marketing, and business professionals with decision-making roles in digital experience (DX) delivery technologies, and we asked them about their strategies for the coming 12 months. See the April 1, 2014, “The State Of Digital Experience Delivery, 2014” report.

5 This landscape report, part of the digital experience delivery playbook, defines the use cases, business value, and outlook for the 14 technologies that compromise the core digital customer experience technologies. See the September 3, 2013, “TechRadar™ For AD&D Pros: Digital Customer Experience Technologies, Q3 2013” report.
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