

VENDOR SELECTION MATRIX™ BRAND CONTENT MANAGEMENT SOFTWARE

THE TOP GLOBAL VENDORS 2021

Research In Action

August 2021

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RESEARCH IN ACTION
independent research & consulting

FOREWORD

Every year, Research In Action surveys 10,000+ enterprise IT and business decision makers in order to gain insights on strategy, investments and ongoing challenges of technology innovation in the IT and Marketing Automation realm. These surveys give us access to a wealth of direct and unfiltered feedback from the buyers. It also helps us to understand how buying decisions are made in today's business environment. The Vendor Selection Matrix™ is a primarily survey-based methodology for vendor evaluation where 63% of the evaluation is based on a survey of enterprise IT or business decision makers and 37% on the analyst's judgement. The analyst's input is fed by a combination of intensive interviews with software or services vendors and their clients, plus their informed, independent point-of-view as an analyst. All of this combines to make Research in Action Vendor Selection Matrix™ reports so unique. This approach is one of the key differentiators of Research In Action in market research. For this report we interviewed 1,500 marketing and business managers with budget responsibility in enterprises globally. We selected those vendors which achieved the best evaluations scores from the buyers but disregarded those with fewer than 15 evaluations.

Our method of describing a business process and asking business managers to name software vendor(s) they associate with it collates a list of those vendors most relevant for potential buyers of an automation solution. The resulting vendor landscape for Brand Content Management (BCM) is a broad mix of vendors with a wide variety of claims: brand governance, brand portal, digital asset management, content management hubs, and even marketing resource management. Hardly any vendor can cover all process within BCM, so companies are deploying software from more than one of the vendors appearing in this landscape – 76% of the respondents have more than one vendor and 24% have six or more systems installed.

The BCM challenge also varies across the B2C and B2B spectrum; due to the complexity of a company's distribution channel; as well as whether you are a medium-sized company or a large international enterprise.

Another important variable is who leads the project: Marketing professionals or the IT organization. The challenge for many established, IT-centric, BCM vendors is to get better at communicating to business buyers in their terms.

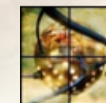
This report provides you with a useful guide to important Brand Content Management trends, preferences and challenges; names the Top 15 vendors as selected by 1,500 users based upon product, company and service quality; and will help you make an informed decision regarding which vendors could best fit your requirements. This information can then be used for a more detailed evaluation.

Always keeping you informed!

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VENDOR SELECTION MATRIX™

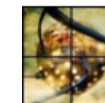
BRAND CONTENT MANAGEMENT



	STRATEGY	EXECUTION	TOTAL
1. CENSHARE	4.64	4.73	9.36
2. BRANDMAKER	4.60	4.64	9.24
3. WEDIA	4.51	4.51	9.03
4. BRANDMUSCLE	4.39	4.56	8.95
5. BYNDER	4.43	4.50	8.93
5. BRANDMASTER	4.35	4.49	8.84
7. CELUM	4.33	4.33	8.65
8. OPTIMIZEY	4.29	4.25	8.54
9. SITECORE	4.19	4.15	8.34
10. ANSIRA	4.15	4.11	8.26
11. ADOBE	3.93	3.78	7.70
12. OPENTEXT	3.89	3.68	7.56
13. CAPITAL ID	3.76	3.64	7.40
14. ACOUSTIC	3.70	3.58	7.28
15. MARCOMCENTRAL	3.63	3.59	7.21

Notes:

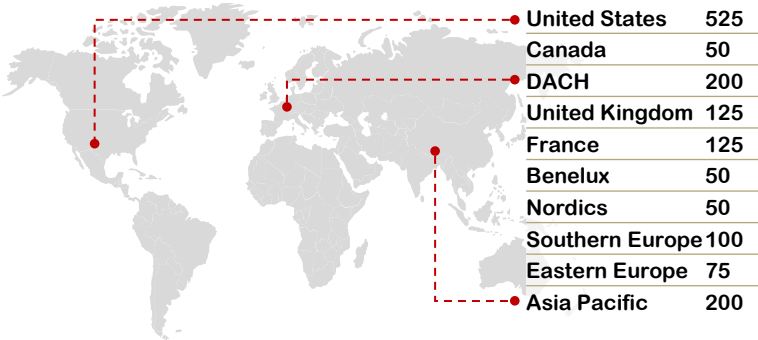
- Scale Explanation: 1 (Low) To 5 (High).
- Potential numerical deviations due to rounding.



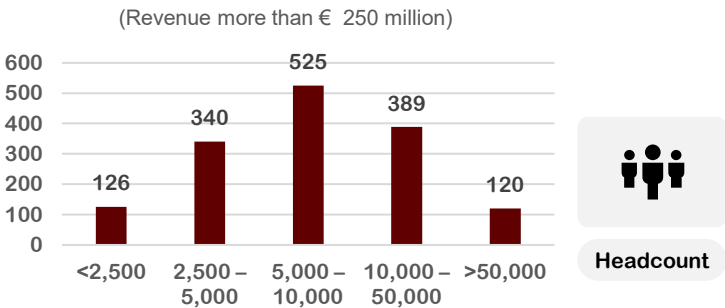
RESEARCH IN ACTION
vendor selection matrix®

OUR SURVEY DEMOGRAPHICS: MARKETING AUTOMATION

Country Breakdown



Company Size Breakdown



Industry Breakdown

Energy	97
Financial Services	256
Government & Non-Profit	92
Life Sciences	200
Manufacturing	350
Technology, Media & Telecoms	200
Consumer Packaged Goods & Retail	105
Professional Services	100
Travel & Transportation	100
Total	1,500

Job Title Breakdown

Business Unit Marketing Executive	179	Chief Digital Office	62
Corporate Marketing Executive	167	Sourcing/Vendor Management	87
VP /Director Marketing Operations	146	COO	52
VP/Director Demand Generation	135	VP IT	39
Business Executive	129	Chief Sales Officer	31
VP/Director Sales	121	CFO	25
VP/Director Marketing Analytics	112	Chief Sales Officer	15
CIO	85	Total	1,500
VP/Director Marketing Technology	66		
CTO	64		

All Research in Action surveys are gender neutral and 100% confidential.



100,000+
Data Points



1,500
Marketing and Business Managers



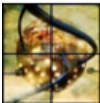
37%
Analyst's Opinion



63%
Survey Results

The Vendor Selection Matrix™ Evaluation Methodology:

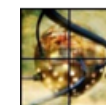
The basis of our competitive vendor evaluation reports is always an extensive buyer survey. We then select those vendors which achieved the best evaluations scores from the buyers but disregard those with fewer than 15 evaluations. The final matrix scores are a combination of the survey results, vendor input and analyst's opinion.



OUR MARKET IMPACT OVER 12 MONTHS



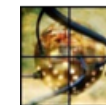
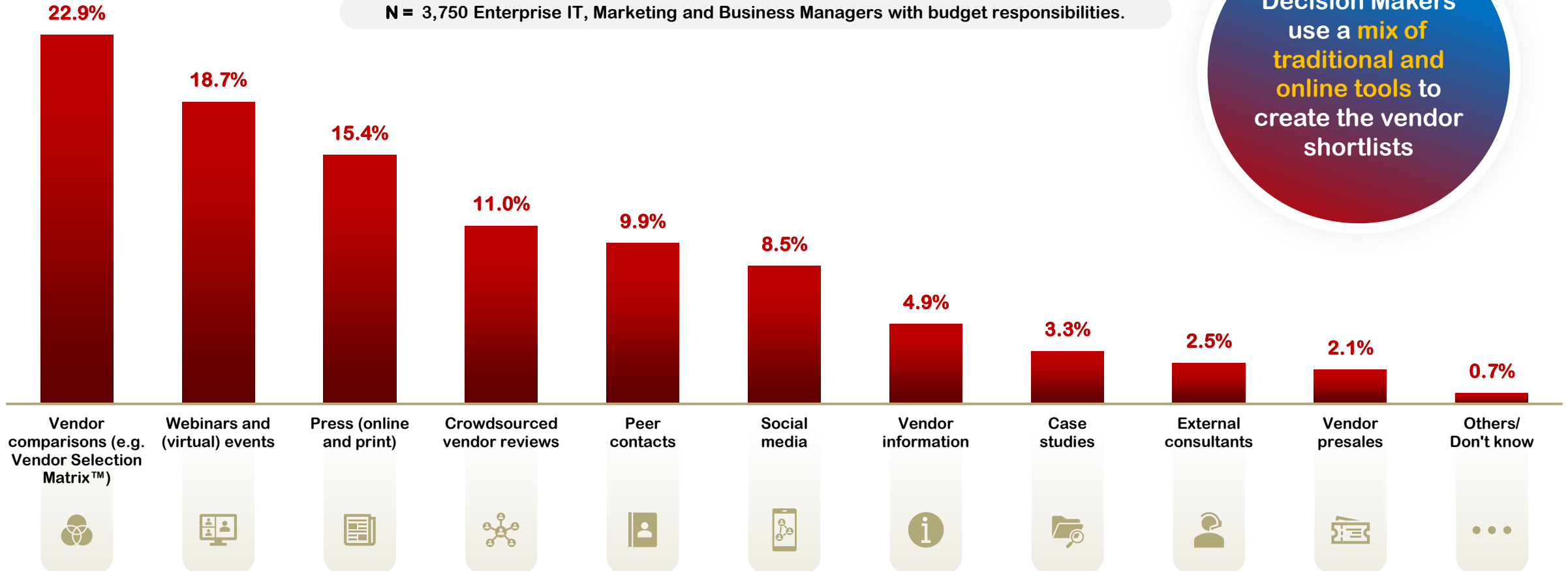
Vendor Selection Matrix™: The right mix makes all the difference
63% customer evaluations + 37% analyst's judgement = 100% success



WHAT TOOLS DO YOU USE TO CREATE THE VENDOR SHORTLIST?

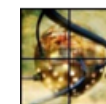
N = 3,750 Enterprise IT, Marketing and Business Managers with budget responsibilities.

Decision Makers use a **mix of traditional and online tools** to create the vendor shortlists



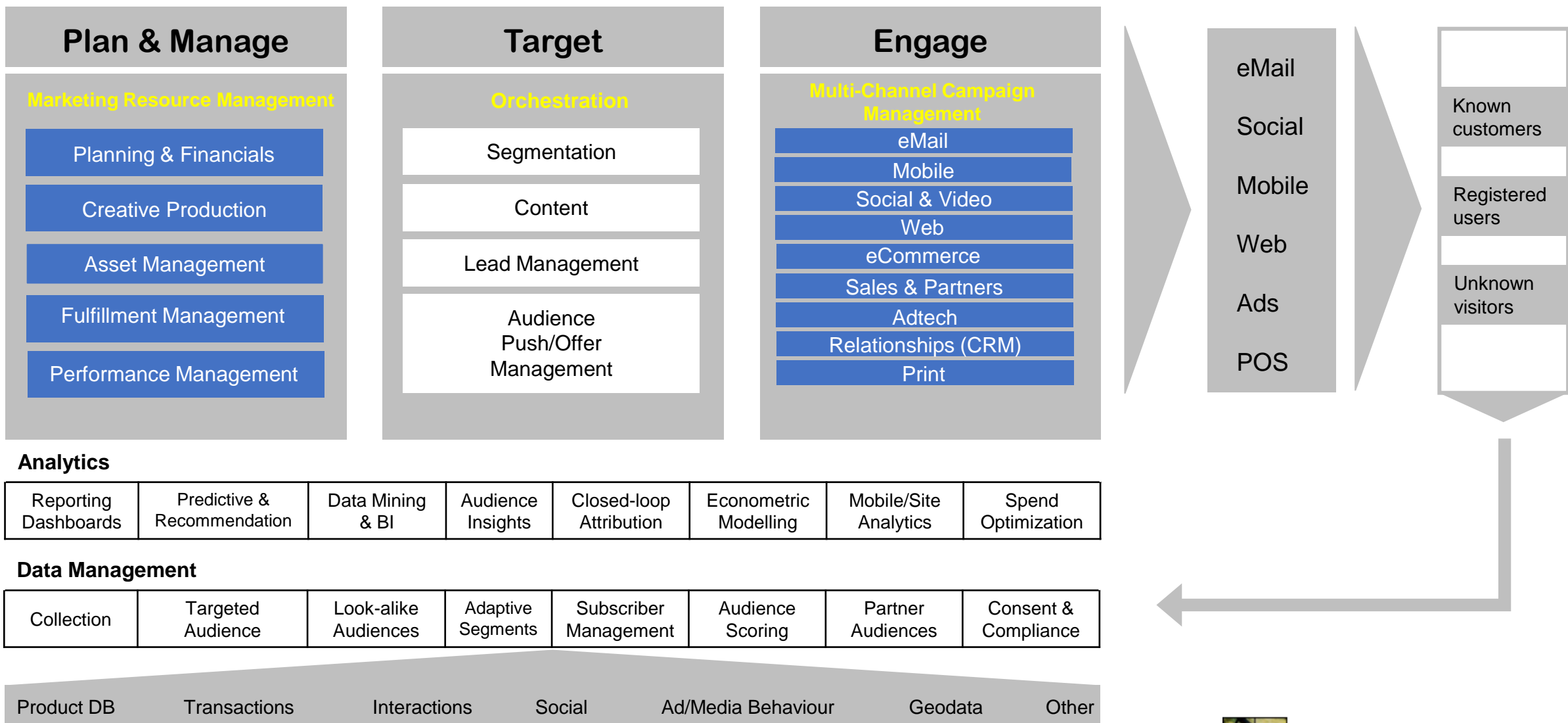
WHAT IS BRAND CONTENT MANAGEMENT ?

- **Brand content marketing is more than the traditional definition of “content marketing”, which is the process of creating valuable and useful pieces of content to attract potential customers to your ecosystem. Brand content is a broader definition of all communication that any business distributes: all content plus its deployment in various marketing channels, by all internal staff, by agencies, and by channel partners and/or subsidiaries. Brand Content Management (BCM) processes therefore involve working in tandem with many other parts of the company and external partners. It is also a balance of enablement and governance.**
- **As well as managing all digital content assets, BCM software can steer all brand messaging across the company, from corporate brand to individual messaging statements around product. Companies working in a more distributed (sometimes called local) marketing environment deploy BCM software to manage content across all their internal organizations, subsidiaries, and/or all business partners. Other labels used within this category include Digital Asset Management, Digital Content Management, Distributed Marketing and Brand Management.**
- **Companies with a simple sales model and elementary marketing maturity usually operate just a static Digital Asset Management (DAM) system to manage content of various types. Firms with complex organizations and multiple sales channels would tend towards a Through-Channel Marketing Automation (TCMA) system to cover BCM needs.**



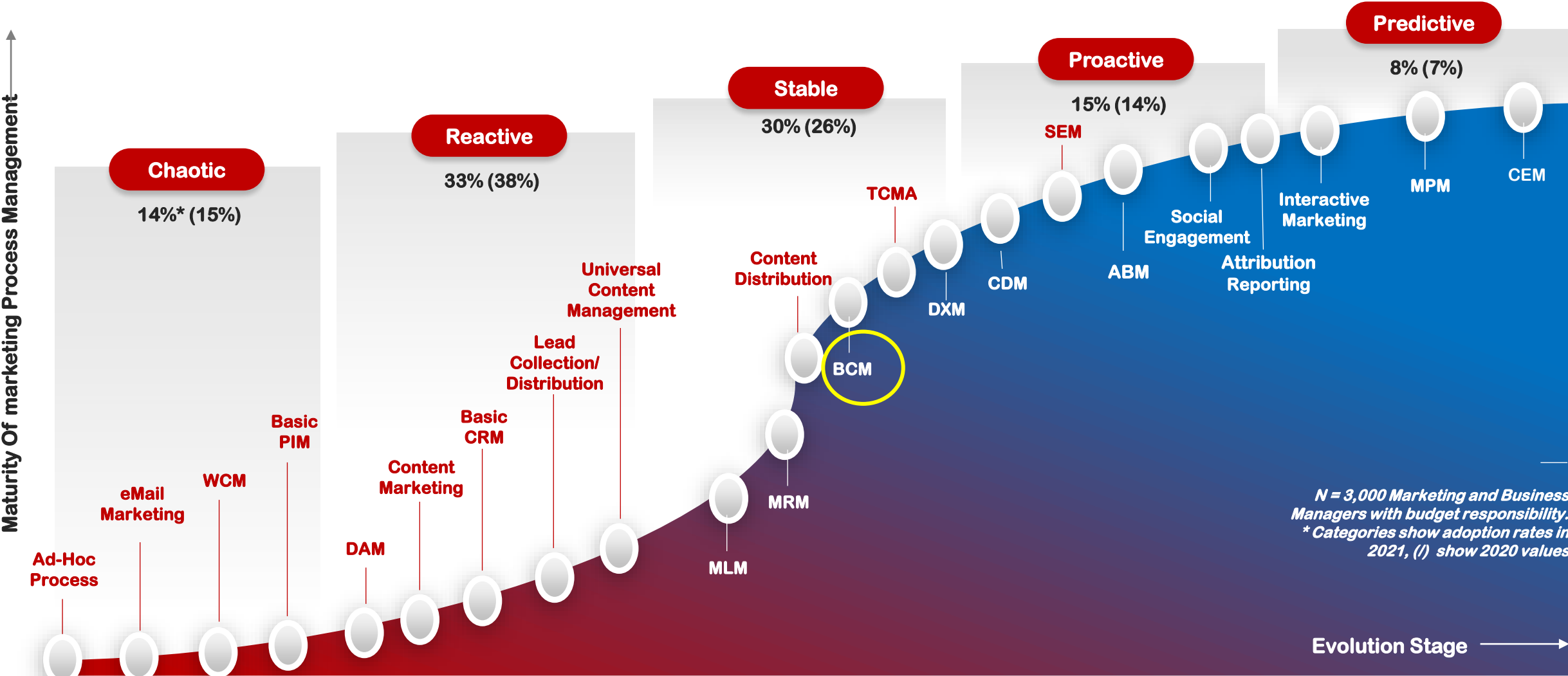
THE MARKETING AUTOMATION MARKETEXTURE

Our surveys and consulting work is based around this schematic architecture of martech processes. BCM is a strategy and encompasses many of these processes and is therefore not separately listed in the Marketexture.



MARKETING PROCESS MATURITY S-CURVE 2021

Our surveys and consulting work enable us to continually assess the maturity of marketing organizations (combination of organization, process and technology) and we observe these five phases. BCM is most prevalent in the middle stage.



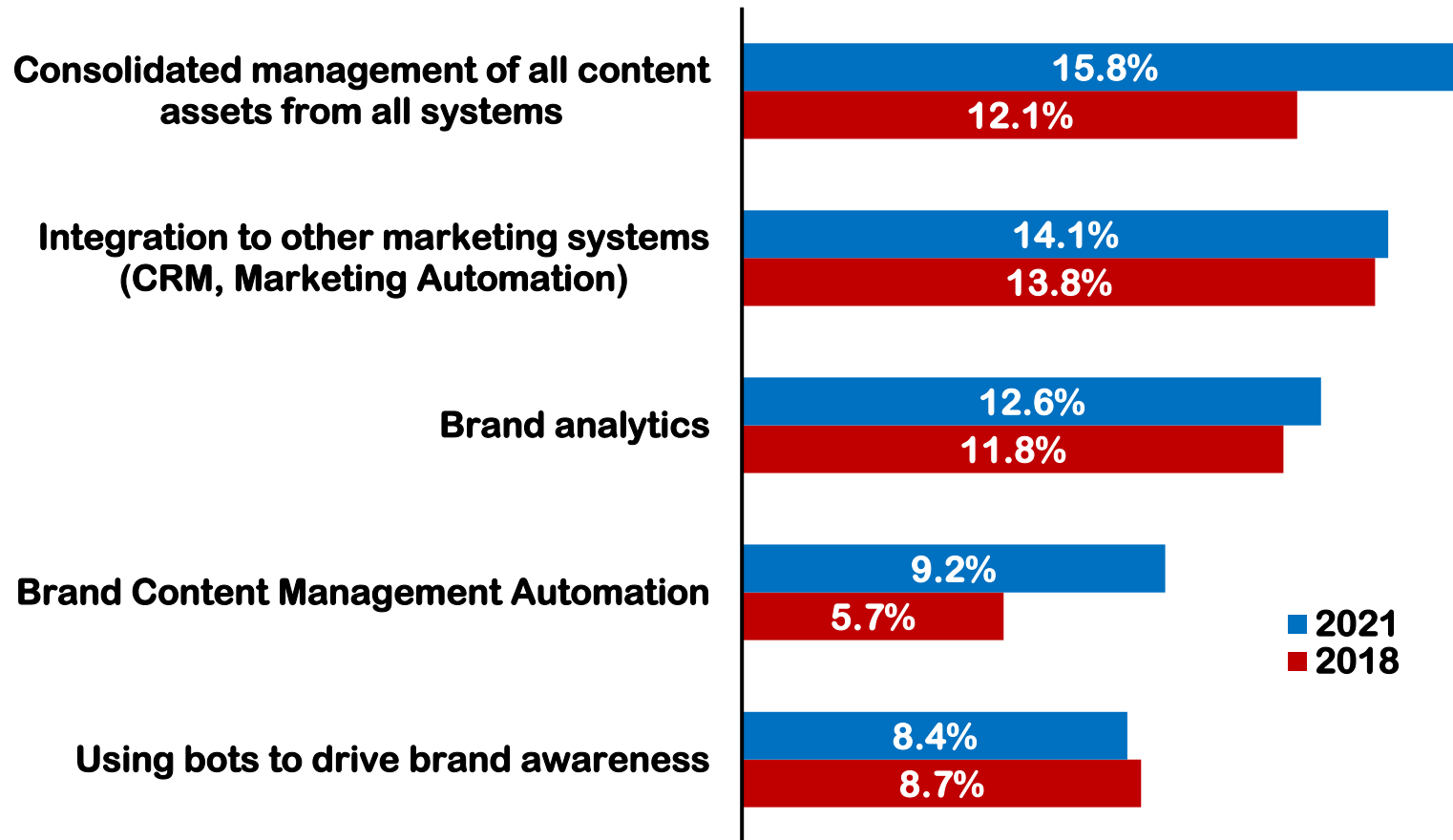
All acronyms are defined in the report Appendix



RESEARCH IN ACTION
vendor selection matrix®

RESEARCH:

THE TOP FOCUS IN BCM AUTOMATION PROJECTS IN THE NEXT 12 MONTHS



N = 1,500 Marketing and Business Managers with budget responsibilities.

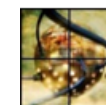
Strong focus on Consolidation and Integration.

These are the Top Five investments drivers named by enterprise marketing software buyers. We asked for their #1 focus.

In the previous survey (2018), Integration was selected by just 13.8% and Consolidation by 12.1%

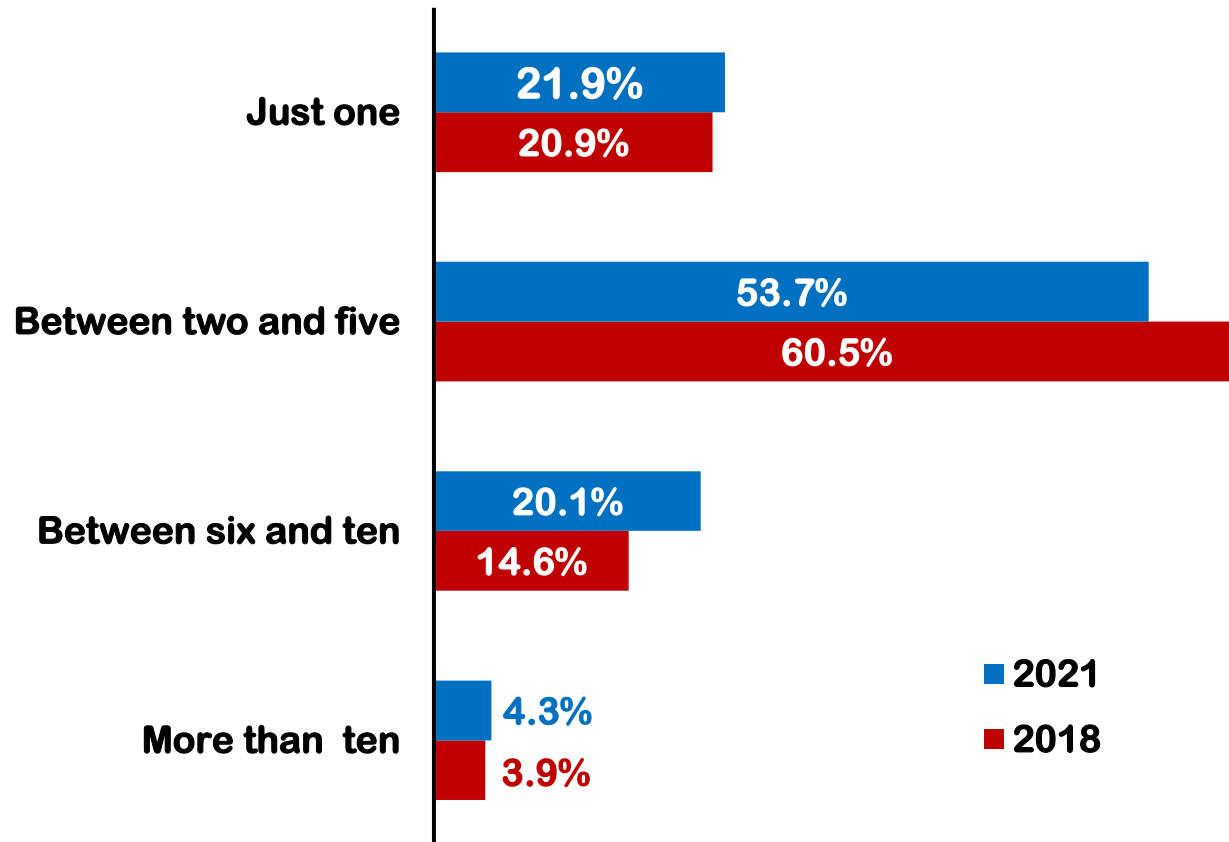
Less than 5% of the respondents selected “*Managing brand messaging across the company*” or “*Improving governance of brand messaging*”, but that is probably because those objectives are implicit in “*BCM Automation*” (9.2%).

Buyers are most likely to engage with those BCM vendors whose messaging addresses these motivations.



RESEARCH:

HOW MANY DIFFERENT SOFTWARE VENDORS ARE IN THE CURRENT OVERALL BCM STACK, INCLUDING CMS, DAM AND PIM



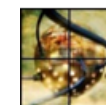
N = 1,481 (2021) and 1,475 (2018) Marketing and Business Managers with budget responsibilities.

This highlights and underscores the need for consolidation across the brand and content management stacks.

Nearly one quarter of the respondents have more than **Six** different systems in place (note: we asked “vendors”, so the number of systems could be even higher).

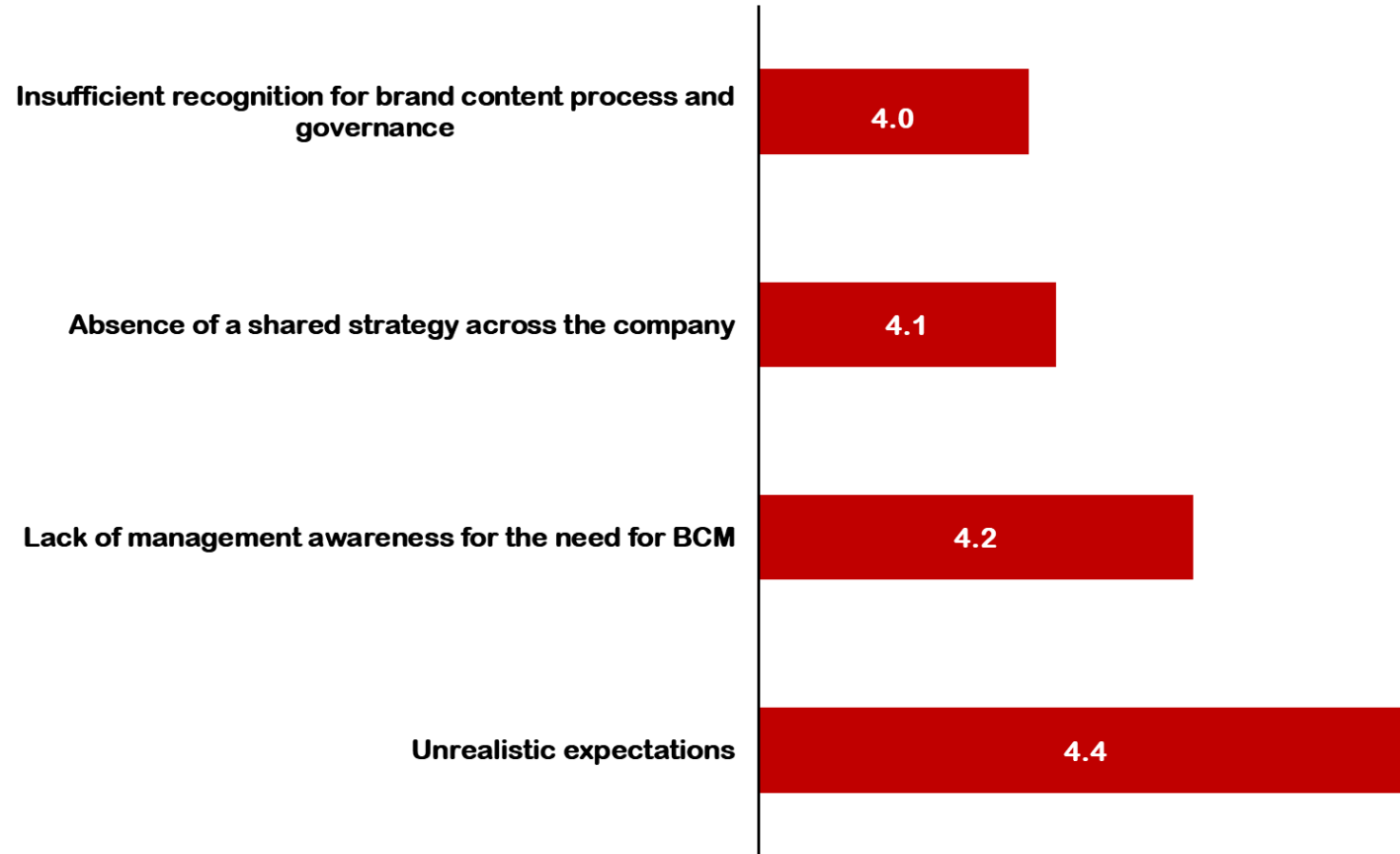
The proportion with 6-10 vendors has increased dramatically since our 2018 survey.

NOTE: The spread also varies largely across the global survey. In North America, 35% have more than 6 vendors, while the APAC equivalent is just 6%.



RESEARCH:

THE MOST SIGNIFICANT CHALLENGES IN DEPLOYING BCM



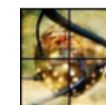
N = 1,500 Marketing and Business Managers with budget responsibilities.

The respondents were asked to score the significance of various challenges in deploying BCM in their organizations. These were the four most significant. (5 is the maximum).

The option “unrealistic expectations” is not useful at all; it served as a catch-all – sorry. The most important issues are management attention, recognition, and strategy.

NOTE: There are significant differences when analyzed by company size. Another challenge “*Ensuring collaboration across disparate organizations*” is in the Top 4 in large to very large enterprises (> 5,000 employees).

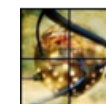
Buyers are most likely to engage with vendors that can help them address these challenges. Ideally, these could be themes for content or thought leadership marketing programs.



INSIGHTS: TOP BCM MARKET TRENDS 2021

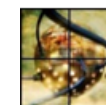
- **Marketing content needs more personalization and context.** Marketers need to render content that is as personal as possible to the target audience. Industry or business-function level content customization is now table-stakes. Personalization is now the Holy Grail*, using personal and/or behavioral data to further target the content used in marketing programs.
- **Brand Content Management systems become platforms for all formats of communication.** Brand is now more than a logo; it is a statement of purpose, a promise. The definition of brand content has expanded from corporate or product literature to include social media communications, video and other formats. BCM systems are now expected to collect, manage, distribute these communication formats through partners and across the enterprise, while also governing how the brand is used by all players.
- **Marketing attribution becomes a business fundamental.** Content performance and attribution is now a priority for B2B and B2B2C; mainly given the reality of increasing privacy legislation to adequately track behaviors and as the proliferation of available customer touchpoints mount. For companies with significant channel business, accurate attribution to the worthy partner is also an economic priority. BCM will include truly advanced, multi-touch attribution functions beyond basic attribution like first-touch, last-touch, etc.
- **The emergence of Through-Channel Marketing Automation (TCMA).** Many international B2B or B2B2C enterprises require more than just a repository of content assets for channel partners. A mature TCMA system also supports full campaign execution, including lead management, management of marketing funding across the ecosystem, and provide analytics to optimize investment and drive broader adoption.

* The **Holy Grail** (Welsh: *Greal Sanctaidd*) is a treasure that serves as an important motif in Arthurian literature.



INSIGHTS: TOP BCM VENDOR TRENDS 2021

- **The BCM vendor landscape is bewildering.** BCM vendors have a variety of roots and do not necessarily talk about this topic at first look. The best fit are DAM vendors with process support for broader content and brand management; or marketing resource management platform vendors that including brand resources in the list. Also, vendors using the TCMA (or T-Partner MA) label.
- **Marketing suite vendors are taking ownership but ...** Initially slow to address BCM challenges, the larger vendors have been busy in the last year announcing broader content management strategies. However, many of them are focused only on consolidating their own applications.
- **Integration becomes a significant challenge.** As the IT department increases its influence on all marketing projects, there is increased expectation around integration capabilities to other marketing systems, including Product Information Management and eCommerce systems. Not every vendor solution is architected to cover these needs. However, often, buyers will compromise and take a less-capable BCM solution from the larger enterprise software vendors, assuming it is better integrated.
- **BCM vendors talk technology, not business or even marketing.** Despite the strategic level of the topic, some BCM vendors can struggle to differentiate themselves. Preferring to debate on their own competing technologies, they do not help marketers to understand what is being offered and what business issues they solve.
- **Cloud-based solutions are preferred.** SaaS-based software has made this automation technology easier to adopt and integrate than the largely on-premises-based applications offered a few years ago. This is also resulting in a new market opportunity at midmarket companies with smaller sales and marketing teams who can now afford to invest.



VENDOR SELECTION MATRIX™

BRAND CONTENT MANAGEMENT



These are the Top 15 vendors as selected by 1,500 users based upon product, company and service quality.

VENDOR NAME	PRODUCT(S)
ACOUSTIC	Acoustic Content
ADOBE	Adobe Experience Manager Sites, Adobe Experience Manager Assets
ANSIRA	Ansira Edge Technology Suite, Ansira Agency Services
BRANDMAKER	Digital Asset Management, Brand Management
BRANDMASTER	Brandmaster Platform, Brand Activation Management
BRANDMUSCLE	BrandMuscle Integrated Local Marketing Platform
BYNDER	Digital Asset Management, Brand Guidelines, Video Brand Studio,
CAPITAL ID	Brand Portal
CELUM	Celum Digital Asset Management Platform, Frontify Brand Management
CENSHARE	Censhare Content Platform
MARCOMCENTRAL	Marcom Portal
OPENTEXT	Enterprise Content Management, Content Cloud
OPTIMIZE	Digital Experience Platform
SITECORE	Sitecore Content Hub (Digital Asset Management, CMP, Marketing, Brand Portal)
WEDIA	Digital Asset Management, Distributed Marketing Management, Digital eXperience Management

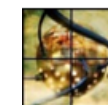
NOTE: If a vendor does not respond, Research in Action will complete its scoring assessment based on analyst experience and desk research. The vendor's products and quick facts will be documented in the report, though a vendor scorecard will not be written.

This list is alphabetical and includes all relevant BCM vendors and solutions named by the survey respondents.

Acoustic reports that they do not offer any BCM solutions, but we have left them in, as the survey respondents disagree. Brandmaster is now part of Papirfly Group. Celum often partners with Swiss vendor Frontify for BCM solutions.

Additional vendors that were cited but did not list in the Top 15, or had less than 15 ratings:

- BRANDSYSTEMS
- CODE WORLDWIDE
- HUDDLE
- IMPARTNER
- INFOR
- MINDMATRIX
- NORTHPLAINS
- PICA9
- SAS
- SEISMIC



VENDOR SELECTION MATRIX™

BRAND CONTENT MANAGEMENT



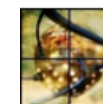
Vendor Quick Facts

VENDOR NAME	MARKET PRESENCE	GROWTH RATE	CUSTOMER TRACTION	GOOD TO KNOW
ACOUSTIC	Small	Low	Medium	Do marketing differently in order to help your brand aim higher
ADOBE	Very Big	Medium	Medium	The enterprise leader in content creation, management, and delivery
ANSIRA	Medium	Medium	Good	Channel marketing and enablement experience plus proprietary technology
BRANDMAKER	Big	Medium	Good	Bridges marketing strategy and execution with real-time transparency and control
BRANDMASTER	Medium	Medium	Good	Brand management platform created for marketing professionals
BRANDMUSCLE	Medium	Medium	Medium	US leader for local or distributed brand and content marketing scenarios
BYNDER	Big	Medium	Good	Enables teams to get content to market faster
CAPITAL ID	Medium	Medium	Medium	make your content creation as easy, quick, efficient and on brand as possible
CELUM	Medium	High	Good	Classical content marketing hub partnering with brand management vendor
CENSHARE	Medium	High	Strong	Manages content and brand complexity giving marketers their freedom to create
MARCOMCENTRAL	Small	Medium	Medium	Helps organizations accelerate sales with brand content management
OPENTEXT	Big	Low	Medium	Robust content management capabilities
OPTIMIZELY	Big	Medium	Medium	Empowers companies to compete digitally through digital experiences
SITECORE	Very Big	Medium	Strong	Supports the content planning, creation, management and delivery lifecycle
WEDIA	Medium	High	Strong	Helps enterprises manage, customize and deliver their marketing assets

MARKET PRESENCE	GROWTH RATE	CUSTOMER TRACTION
Very Big	Very High	Strong
Big	High	Good
Medium	Medium	Medium
Small	Low	Low

NOTES:

- Market Presence combines the market share and perceived Mindshare (or Share of Mind).
- Growth Rate is the anticipated growth rate for this year where Medium is the average growth for this market.
- Customer Traction combines the vendor's customer retention rate and the Research In Action Recommendation Index (RI). The RI is collected and calculated by asking the survey participants: "Would you recommend this vendor in this market to your peers - Yes or No?".



VENDOR SELECTION MATRIX™:

EVALUATION CRITERIA

STRATEGY

Vision And Go-To-Market	30%	<ul style="list-style-type: none">› Does the company have a coherent vision in line with the most probable future market scenarios?› Does the go-to-market and sales strategy fit the target market and customers?
Innovation And Differentiation	30%	<ul style="list-style-type: none">› How innovative is the company in this market?› Does the solution have a unique selling proposition and clear market differentiators?
Viability And Execution Capabilities	15%	<ul style="list-style-type: none">› How likely is the long-term survival of the company in this market?› Does the company have the necessary resources to execute the strategy?
Recommendation Index	25%	<ul style="list-style-type: none">› Would customers recommend this vendor in this market to their peers?

EXECUTION

**Breadth And
Depth Of Solution
Offering**

30%

- › Does the solution cover all necessary capabilities expected by customers?

**Market Share
And Growth**

15%

- › How big is the company's market share and is it growing above the market rate?

**Customer
Satisfaction**

25%

- › How satisfied are customers with the solution and the vendor today?

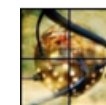
**Price Versus
Value Ratio**

30%

- › How do customers rate the relationship between the price and perceived value of the solution?

NOTES:

- 63% of the evaluation is based on the survey results, 37% is based on the analysts' assessment.
 - 40% of the evaluation is based on the survey results: (1) Recommendation Index, (2) Customer Satisfaction, (3) Price Versus Value.
 - 15% of the evaluation is based on the analysts' assessment: (1) Viability And Execution Capabilities, (2) Market Share And Growth.
 - 45% of the evaluation is based on a combination of survey results and analysts' assessment: (1) Vision And Go-To-Market (2) Innovation And Differentiation (3) Breadth And Depth Of Solution Offering.
- The Research In Action Recommendation Index (RI) is collected and calculated by asking the survey participants: "Would you recommend this vendor in this market to your peers - Yes or No?".



VENDOR SELECTION MATRIX™

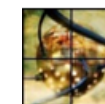
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RESEARCH IN ACTION
vendor selection matrix®

VENDOR SELECTION MATRIX™

BRAND CONTENT MANAGEMENT TOOLS

Ansira is a market leader for Brand Content Management tools with a century of experience in channel marketing and enablement supported by proprietary technology

STRATEGY	RESULT	EXECUTION	RESULT
Vision And Go-To-Market	4.25	Breadth And Depth Of Solution Offering	4.00
Innovation And Differentiation	4.00	Market Share And Growth	4.25
Viability And Execution Capabilities	4.50	Customer Satisfaction	4.00
Recommendation Index	4.00	Price Versus Value Ratio	4.25
	4.15		4.11

GENERAL:

Founded in 1919 as a clippings agency, Ansira now offers a full-service software platform for channel relationship management and brand-to-local marketing processes.

It has over 1,000 employees in the US, the UK and Australia and, as a marketing services agency, it has over 150 large and midsize business clients, including more than 25 of the Fortune 500 brands.

Over 100 of those companies, mostly in the Automotive, Retail and Tech sectors, are now also using its Ansira Edge Technology Suite™.

STRATEGY:

Ansira talks of empowering relationship and channel marketers to deliver consistent, relevant, and profitable brand experiences. The offering is services-led, powered by proprietary technology.

The Suite continues to expand as Ansira acquires new vendors such as the CRM vendor Brightwave and automotive dealership marketing service provider CDK Global.

Ansira orchestrates customer engagement and loyalty, channel empowerment, and local marketing activation. It offers marketing services like media planning and buying, digital and marketing technology strategy, and Email.

As well as being a Market Leader, the vendor scored an impressive Recommendation Index of 96%.

EXECUTION:

Ansira gains many Ansira Edge technology clients through referral and cross-selling to clients of its mainstream marketing data services around SEO and listing management, loyalty programs, CRM data, and Local Marketing Activation.

The software solution is primarily fully-managed and wrapped with brand and partner services.

Ansira has now restructured through the creation of Ansira Digital, Ansira Channel, and Sincro (rebrand of CDK) business units.

BOTTOM LINE:

The company has extensive experience in advising clients on their channel marketing and offers a capable software platform to support modern channel marketing processes and programs.

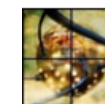
Ongoing support by private equity investor Advent International, will help Ansira to expand into new markets and developing new capabilities through both organic growth and strategic acquisitions.

It is well positioned to drive even more success for clients: providing deeper expertise by sector and agile collaboration across units to offer end-to-end solutions.



Notes:

- Scale Explanation: 1 (Low) To 5 (High).
- Potential numerical deviations due to rounding.



RESEARCH IN ACTION
vendor selection matrix®

VENDOR SELECTION MATRIX™

BRAND CONTENT MANAGEMENT TOOLS

BrandMaker is a market leader for Brand Content Management tools, bridging marketing strategy and execution to provide real-time transparency and control

STRATEGY	RESULT	EXECUTION	RESULT
Vision And Go-To-Market	4.50	Breadth And Depth Of Solution Offering	5.00
Innovation And Differentiation	4.75	Market Share And Growth	4.00
Viability And Execution Capabilities	4.25	Customer Satisfaction	4.75
Recommendation Index	4.75	Price Versus Value Ratio	4.50
	4.60		4.64

GENERAL:

Founded in 2008 in Germany, BrandMaker has over 350 enterprise customers worldwide, most of which are challenged with marketing processes more complex than normal in terms of channels, subsidiaries, and geographic spread.

The vendor is currently expanding rapidly in the US especially, with 70% of its new customers located there.

It now supports over 350,000 users in 90 countries – with an annual growth of 35% - 40% over the last years.

At the time of this report going to press, the vendor announced a merger with the marketing financial management vendor Allocadia.

STRATEGY:

The vendor provides solutions across the complete marketing resources spectrum including a stand-alone DAM solution; but also modules for marketing planning and budgeting; operations; and brand and content management.

Although its customers are mainly from the enterprise segment, the DAM installed base is more mixed as mid-sized companies opt for a BrandMaker DAM solution in one-off projects, able to take advantage of the vendor’s intuitive user interface and powerful search functions which allows other departments, agencies and occasional users to quickly find the right digital assets. AI-based image tagging improves asset retrieval and visibility

As well as being a Market Leader, the vendor scored an outstanding Recommendation Index of 99%.

EXECUTION:

The vendor’s direct sales and consulting organizations work together with leading marketing agencies and consultancies.

It also offers services for solution implementation and customization, as well as change management. Indeed, BrandMaker was scored highest of all vendors for the Customer Satisfaction category.

The survey respondents also rated its Breadth and Depth of Solution with the maximum possible score of 5.

BOTTOM LINE:

BrandMaker excels at enterprise-level brand management and is the preferred vendor for companies requiring consistent marketing fulfillment functions across hundreds of dealers, franchises or country subsidiaries.

It has now built up a Customer Success team of experienced industry marketers to ensure future growth across its customer base. Unlike many other marketing software vendors, BrandMaker has built its solution organically, so all its modules do work together by design.

Across all industries, marketing organizations are becoming more process-oriented and focused on managing all their resources more transparently. BrandMaker is extremely well positioned to take advantage of these new needs.



Notes:

- Scale Explanation: 1 (Low) To 5 (High).
- Potential numerical deviations due to rounding.



RESEARCH IN ACTION
vendor selection matrix®

VENDOR SELECTION MATRIX™

BRAND CONTENT MANAGEMENT TOOLS

BrandMuscle is a market leader for Brand Content Management tools as the established US leader for local or distributed brand and content marketing scenarios

STRATEGY	RESULT	EXECUTION	RESULT
Vision And Go-To-Market	4.50	Breadth And Depth Of Solution Offering	4.75
Innovation And Differentiation	4.50	Market Share And Growth	4.00
Viability And Execution Capabilities	3.75	Customer Satisfaction	4.75
Recommendation Index	4.50	Price Versus Value Ratio	4.50
	4.39		4.56

GENERAL:

BrandMuscle has been a thought leader and vendor for decades on local marketing processes, i.e. marketing a global brand at a local level through subsidiaries or channel partners.

They enhanced and modernized their offering when acquiring the software vendor Saepin in 2016.

BrandMuscle software is now deployed by over 300 global companies to manage nearly 1 million local business partners and over \$ 2 billion in co-op marketing funds annually.

STRATEGY:

The vendor helps its customers to manage market development and co-op funds, create and manage brand-compliance, and support location-based marketing programs.

As well as providing software to the brand-owning companies, the BrandMuscle Intelligent Marketing Platform also supports the channel partners: From managing program funding, creating corporate-compliant digital or traditional collateral, and supporting integrated marketing campaigns.

As well as being a Market Leader, the vendor scored an impressive Recommendation Index of 98%.

EXECUTION:

The vendor targets enterprises with robust co-op and MDF incentive programs and companies with over 500 "locations" (retailers, partners, etc.), in sectors with regulatory and compliance issues (eg. alcohol, finance), and with an executive responsible for driving channel revenue as a key component of the go-to-market strategy.

BrandMuscle publishes a Local Marketing Maturity Matrix™, a formula and framework that allows companies to benchmark their local marketing maturity and proficiency, providing diagnostic consulting based on results.

BrandMuscle was scored highest of all vendors for the Customer Satisfaction category.

BOTTOM LINE:

With nearly 800 full-time employees in North America and India, BrandMuscle probably has the largest client service, product development, and local marketing execution support team in the industry.

BrandMuscle is the most attractive to companies with extremely complex and/or large distributed models.

It offers a single, end-to-end solution with integrated vendors, enabling brands to easily scale local programs from strategy to execution.

BrandMuscle's greatest opportunity would be to expand internationally.



RESEARCH IN ACTION
vendor selection matrix®

Notes:

- Scale Explanation: 1 (Low) To 5 (High).
- Potential numerical deviations due to rounding.

VENDOR SELECTION MATRIX™

BRAND CONTENT MANAGEMENT TOOLS

Celum is a market leader for Brand Content Management tools with a classical content marketing hub and partnering with a leading brand management vendor

STRATEGY	RESULT	EXECUTION	RESULT
Vision And Go-To-Market	4.50	Breadth And Depth Of Solution Offering	4.25
Innovation And Differentiation	4.25	Market Share And Growth	4.25
Viability And Execution Capabilities	4.25	Customer Satisfaction	4.25
Recommendation Index	4.25	Price Versus Value Ratio	4.50
	4.33		4.33

GENERAL:

Celum was founded in 1999 in Linz, Austria and the privately-held company is well regarded as a supplier of digital asset management and content management software.

It operates offices in the US, Austria, France, Germany and Slovakia. With over 100 employees, it serves over 900 clients in over 35 countries, including international brands such as 3M, Claas, Hilti, Scott, and Swarovski.

Celum has established a deep partnership with the Swiss vendor Frontify that specializes in brand management.

STRATEGY:

Celum positions its software as the necessary central platform for successful content marketing projects. The base product, the Celum DAM Suite, is a Java-based system, available for deployment on-premise, to the Cloud, or via SaaS. The addition of the Hi-End Content Hub product enables clients to manage more complex integration scenarios, around library services and managing marketing centric content.

It also supports extensive workflow capabilities. In addition to the DAM solution and Content Hub, Celum also now offers a teamwork management solution, WorkRooms plus their “All-in-One-Suite” called Content Collaboration Cloud.

The vendor scored a strong Recommendation Index of 97%.

EXECUTION:

The vendor’s customer base is mostly European, and it works with many of its over 50 business partners to cover other regions of the world.

While not the most active or loud in marketing its capabilities, an increasing number of mid-sized organizations are still finding Celum for their projects.

The vendor has an extremely large technology-partner ecosystem of some 80 software vendors, collected through its long experience on completing client projects. This includes 18 CMS/DXP platforms, 12 PIM/ERP solutions and 18 marketing or publishing platforms.

BOTTOM LINE:

Celum has a capable BCM solution set, well suited for companies with core content library services and planning to expand to a content marketing hub.

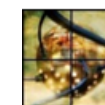
Celum is a good choice for all companies that require strong multilingual support, a business-oriented user interface, and prefer on-premises deployments.

The farming machinery manufacturing giant Claas, claims the Celum solution saves them up to two thirds in production time (and cost) from photo shooting to brochure/website rendition.



Notes:

- Scale Explanation: 1 (Low) To 5 (High).
- Potential numerical deviations due to rounding.



RESEARCH IN ACTION
vendor selection matrix®

VENDOR SELECTION MATRIX™

BRAND CONTENT MANAGEMENT TOOLS

Censhare is the overall Winner for Brand Content Management tools managing content and brand complexity giving marketers more freedom to create

STRATEGY	RESULT	EXECUTION	RESULT
Vision And Go-To-Market	4.50	Breadth And Depth Of Solution Offering	5.00
Innovation And Differentiation	4.75	Market Share And Growth	4.50
Viability And Execution Capabilities	4.50	Customer Satisfaction	4.50
Recommendation Index	4.75	Price Versus Value Ratio	4.75
	4.64		4.73

GENERAL:

This German vendor has long provided content marketing software and integration services to enterprises such as Allianz, Dyson, Land's End, Lufthansa, and McDonald's.

Censhare has about 250 employees in offices in North America, around Europe and in India, supporting more than 320 customers, with the largest one having over 10,000 users.

It provides tools and processes to manage the more complex branding and content challenges: with variations in content and delivery across regions, local markets, and channels.

Its customer base is mostly European, though there is significant growth now in the US.

STRATEGY:

The Censhare platform connects disparate content and media sources through its "universal content management hub" to serve multiple digital experience channels.

Censhare delivers three types of project: high-end DAM implementations; DAM plus digital process management; and growth projects where the client uses the Censhare platform to penetrate new markets with dynamic content.

The global survey respondents recognize the vendor as a leading innovator, scoring that category, Innovation and Differentiation, with an outstanding 4.75 out of 5.

The vendor also scored the overall highest Recommendation Index of 99%.

EXECUTION:

The vendor is reluctant to invest sufficient resources to earn recognition from the large research organizations, which can make it difficult to find for new buyers who only use those lists.

Its ecosystem of 40+ partners includes eight large Digital Marketing Service Providers that are qualified to deliver large, global enterprise projects.

As well as being a Market Leader in this matrix, the survey respondents scored Censhare #1 in the Customer Satisfaction category.

The survey respondents also rated its Breadth and Depth of Solution Offering with a maximum score of 5.

BOTTOM LINE:

Censhare is now enjoying increasing success as many enterprises revise their BCM strategy and need a more robust solution.

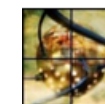
It is most successful when solving content challenges that require an integrated solution across the BCM spectrum.

The product roadmap calls for the Censhare product set to become more of a platform, enabling partners and IT departments to connect project-specific modules. This will make an already comprehensive solution provider in the enterprise DAM, brand and content management market even more relevant.



Notes:

- Scale Explanation: 1 (Low) To 5 (High).
- Potential numerical deviations due to rounding.



RESEARCH IN ACTION
vendor selection matrix®

VENDOR SELECTION MATRIX™

BRAND CONTENT MANAGEMENT TOOLS

Optimizely is a market leader for Brand Content Management tools and empowers companies to compete digitally by creating customer-first digital experiences

STRATEGY	RESULT	EXECUTION	RESULT
Vision And Go-To-Market	4.25	Breadth And Depth Of Solution Offering	4.25
Innovation And Differentiation	4.25	Market Share And Growth	4.25
Viability And Execution Capabilities	4.50	Customer Satisfaction	4.25
Recommendation Index	4.25	Price Versus Value Ratio	4.25
	4.29		4.25

GENERAL:

The vendor Episerver was founded in 1994 in Sweden and it rebranded earlier this year to Optimizely, a vendor it has acquired in 2020.

Now headquartered in both New York and Stockholm, it has offices across the globe.

Over 300,000 marketers, web editors and merchandisers use Optimizely's solutions to create, deliver and optimize brand and content rendering.

Optimizely's Digital Experience Platform (DXP) includes solutions for managing content, campaigns and digital commerce and is available as PaaS and SaaS.

STRATEGY:

Originally in the mid-market, Optimizely now promotes directly to marketers in the mid-market and in enterprises who want to reduce their reliance on IT.

The solution is packaged well for marketers and editors, who can create and manage all of their content and campaigns on one screen. It is also strong for multi-region, multi-site and multi-language customers.

The vendor knows its target personas well and continues to stress the broader capabilities such as digital commerce, personalization, AI, content delivery, customer journey management and analytics.

The vendor scored an impressive Recommendation Index of 97%.

EXECUTION:

The vendor is one of Microsoft's leading Azure ISVs and the e-Commerce solution is tightly coupled with their CMS application.

Based on a microservices architecture, supporting coupled, decoupled, and hybrid scenarios, it is most successful with customer needing strong personalization and commerce in their websites.

The vendor is growing at a rapid rate, having hired 400 new employees already in 2021.

BOTTOM LINE:

Optimizely can capture more enterprise customers, particularly in the US, as it raises its awareness and marketing momentum in these target markets.

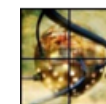
The potential for a customer of a legacy Web Content Management installation to migrate to a newer platform will be strongest when the company has a current or future requirement for digital commerce, as their competitors and customers continue to transact more online.

In those cases, the vendor promises stronger performance, greater agility and better outcomes.



Notes:

- Scale Explanation: 1 (Low) To 5 (High).
- Potential numerical deviations due to rounding.



RESEARCH IN ACTION
vendor selection matrix®

VENDOR SELECTION MATRIX™

BRAND CONTENT MANAGEMENT TOOLS

Sitecore is a market leader for Brand Content Management tools supporting the entire content planning, creation, management and delivery lifecycle.

STRATEGY	RESULT	EXECUTION	RESULT
Vision And Go-To-Market	4.00	Breadth And Depth Of Solution Offering	4.25
Innovation And Differentiation	4.25	Market Share And Growth	4.50
Viability And Execution Capabilities	4.75	Customer Satisfaction	4.00
Recommendation Index	4.00	Price Versus Value Ratio	4.00
	4.19		4.15

GENERAL:

Founded in 2001 in Denmark, Sitecore is well established as the leader for enterprise-wide, multi-site, multi-language digital marketing.

Now headquartered in San Francisco, it has over 1,600 employees serving thousands of B2C and B2B organizations at the high end of the mid-market and enterprise segments, including many of the largest brands in healthcare, financial services, retail, automotive, manufacturing, and more.

As Sitecore's technology expanded, so did its global presence. The company now has operations spanning more than 25 offices across North America, EMEA, and APAC to serve customers across more than 70 countries.

STRATEGY:

The market-driven transition to Cloud for all Sitecore's products is well underway.

Sitecore is now able to offer solutions for brand and content management, production and delivery across the whole content lifecycle, from creation to commerce. Sitecore Content Hub is a separate/standalone product from Sitecore Experience Platform (XP); however, the two are tightly integrated to operate seamlessly together when customer deploy both within their tech stack

The vendor scored an impressive Recommendation Index of 96%.

EXECUTION:

Sitecore has a global direct sales team and goes to market through indirect sales channels via a strong partner ecosystem.

The vendor's Professional Services organization offers advisory services focused on architecture, strategy, quality assurance, etc. – always in coordination with, and complementary to, partners.

The Sitecore partner program is also geared to ensure customer success from strategy through implementation and beyond.

BOTTOM LINE:

Sitecore messaging is primarily focused on managing content and it is refreshing to see an established enterprise software vendor re-invent itself so well.

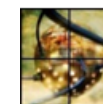
The Sitecore brand and its messaging has been refreshed to hold its own in this new market environment of digital marketing and digital experiences – the same is apparent when talking to the vendor staff and its partners.

There is a large population of experienced, and satisfied, Sitecore customers and partners incumbent in many enterprise organizations and this will ensure that Sitecore continues to be a leader in its market.



Notes:

- Scale Explanation: 1 (Low) To 5 (High).
- Potential numerical deviations due to rounding.



RESEARCH IN ACTION
vendor selection matrix®

VENDOR SELECTION MATRIX™

BRAND CONTENT MANAGEMENT TOOLS

Wedia is a market leader for Brand Content Management tools helping enterprises manage, customize and deliver marketing assets for more relevance and impact.

STRATEGY	RESULT	EXECUTION	RESULT
Vision And Go-To-Market	4.75	Breadth And Depth Of Solution Offering	4.50
Innovation And Differentiation	4.50	Market Share And Growth	4.50
Viability And Execution Capabilities	4.50	Customer Satisfaction	4.25
Recommendation Index	4.25	Price Versus Value Ratio	4.75
	4.51		4.51

GENERAL:

Founded in 2001 in Paris, France, the Wedia Group provides a SaaS solution which is used by 250 customers and 550,000 users to create, transform and distribute their images, videos and other rich content in more than 40 countries.

The vendor also has offices in Frankfurt, New York, and Sidney and has 120 employees. Clients include BMW, BNP, Daimler, Danone, DB, Harley Davidson, Michelin and Nestle.

The vendor offers software for brand management, digital asset and content management, marketing resource management, digital experience, plus project management.

STRATEGY:

Wedia is rapidly expanding from its French base into many other countries in Europe and North America and helping companies to expand their content management projects from simple DAM to fully-threaded BCM with concepts like Content Atomization, Content Snacking, Brand Management.

The past year has seen its largest growth rate ever: almost 50% year-over-year.

It is a member of the Microsoft Partner Network and a certified Gold Azure partner.

The global survey respondents recognize the vendor as a strong innovator and visionary, scoring those categories, with a healthy 4.5 out of 5 and the survey respondents awarded Wedia an impressive Recommendation Index of 97%.

EXECUTION:

Wedia sells through its own direct sales force plus selected partners, including marketing agencies, in some geographies.

It also has a subsidiary, Galilee, which focuses on SMBs in France.

The vendor often implements the software solution for its clients and maintains a proactive customer success team.

The Wedia website provides a wealth of educational and thought leadership content to help its clients develop their BCM projects further, including a “Wiki Wedia” on digital marketing terminology.

The survey respondents scored Wedia as #1 in the Price vs Value category.

BOTTOM LINE:

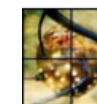
One of the particular strengths of the Wedia platform is its management of videos and other rich media, especially around the collaboration and the editing processes.

Wedia messaging is primarily focused on managing brand and content and it is refreshing to see a relatively small software vendor present itself so well, particularly with its offering of educational content which is much valued by potential buyers.



Notes:

- Scale Explanation: 1 (Low) To 5 (High).
- Potential numerical deviations due to rounding.



RESEARCH IN ACTION
vendor selection matrix®

VENDOR SELECTION MATRIX™

BRAND CONTENT MANAGEMENT TOOLS

Adobe is an enterprise leader in content creation, management, and delivery

STRATEGY	RESULT	EXECUTION	RESULT
Vision And Go-To-Market	4.00	Breadth And Depth Of Solution Offering	4.25
Innovation And Differentiation	4.00	Market Share And Growth	4.00
Viability And Execution Capabilities	4.75	Customer Satisfaction	4.00
Recommendation Index	3.25	Price Versus Value Ratio	3.00
	3.93		3.78

GENERAL:

Adobe is the largest vendor focused on marketing software in the world, headquartered in California, and its DAM functions are offered within the Adobe Experience Cloud solution family.

Built within the Adobe Experience Manager (AEM) platform, though also available stand-alone, Adobe's AEM Assets enables companies to source, manage and assemble digital assets.

Some 1,500 enterprises use AEM Assets to manage their digital assets, and the vendor recently announced its was cloud-native AEM platform which is preferred by most new customers.

STRATEGY:

The vendor has grown via acquisitions and now gathers all its products together under the Cloud metaphor, having systematically converted its product lines and business model to SaaS in the last years.

Its most recent acquisition is Workfront, an active collaboration partner for many years in many Marketing Resource Management projects including DAM.

As well as asset management, AEM Assets also supports creative marketing workflows and rich media delivery processes.

The survey respondents awarded Adobe a Recommendation Index of 92%.

EXECUTION:

Adobe has a strong product portfolio for any enterprise marketing organization and an extensive partner ecosystem of system integrators and, most importantly, marketing agencies.

It has an extensive sales and service organization worldwide. Adobe Experience Manager is most successful with global enterprises and upper-midmarket organizations across a range of industries and uses over 75 pre-built marketing activation APIs to integrate to any marketing automation system.

The survey respondents rated the Price versus Value Ratio with the unusually low score of 3.

BOTTOM LINE:

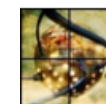
B2C and B2B marketers seeking a DAM solution, even stand-alone, should consider Adobe.

Earlier this year, the vendor announced AEM as a Cloud Service, including AEM Assets, a cloud-native experience management offering which accelerates companies' ability to deliver creative, personalized, omnichannel experiences.

Adobe is already the traditional preferred vendor for content creation for most B2C companies and many B2B organizations and has the resources and strategy to build out this position in all areas of marketing process automation.

Notes:

- Scale Explanation: 1 (Low) To 5 (High).
- Potential numerical deviations due to rounding.



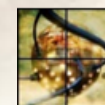
THE RESEARCH IN ACTION GMBH VENDOR SELECTION MATRIX™ METHODOLOGY

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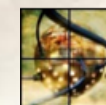
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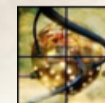
APPENDIX: MARKETING PROCESS DEFINITIONS

- **ABM (Account based marketing).** A process of leveraging collected behavioral and profile data on target companies (accounts) or even individual buying decision-makers.
- **Attribution Reporting.** The ability to recognize the contribution of individual pieces of marketing investment (campaigns, events, specific content assets) to business success. The success factors include metrics like deal progression through the funnel, deal value increase, deal velocity increase and deal closure.
- **BCM (Brand Content Management).** Process to control the brand messaging, from corporate brand to individual messaging statements around products. Companies in a more distributed (or local) marketing environment use BCM systems to manage content across internal organizations, subsidiaries, and/or all business partners.
- **CEM (Customer Engagement Management).** The full orchestration process, support by personalization, of providing and supporting an ongoing digital relationship with individual customers across the full customer lifecycle and organization.
- **Content Distribution.** Process and systems that collate, manage and distribute marketing content both from internal and external sources.
- **Content Marketing.** Publishing digital content on the company website but also on other sites to generate additional web traffic.
- **CRM (Customer Relationship Management).** In most companies, CRM was set by Sales Ops and/IT and has little marketing value. But integration to the CRM database is necessary for marketing/sales alignment.
- **DAM (Digital Asset Management).** The process of consolidating and aggregation of all data from disparate systems in the company about customers - a Marketing-led initiative to ensure the data unification project is focused directly on marketing requirements.
- **DXM (Digital Experience Management).** Creating and updating content, as personalized as possible to the consumer, and rendering it through all required digital communications channels (web, social, POS, etc).
- **eMail Marketing.** The process of setting up campaigns via eMail to purchased or built-up lists of contacts.
- **Interactive Marketing.** Digital marketing programs that provide responsiveness and deep personalization.
- **Lead Collection and Distribution.** The process of collecting and qualifying inbound marketing leads from the increased web traffic generated by content marketing. Distribution of appropriately leads to Sales.



APPENDIX: MARKETING PROCESS DEFINITIONS

- **Lead Collection and Distribution.** The process of collecting and qualifying inbound marketing leads from the increased web traffic generated by content marketing. Distribution of appropriately leads to Sales.
- **MLM (Marketing Lead Management).** Often called just “Marketing Automation”, especially in the US, this is the backbone process family to share content and run digital campaigns, nurturing and progressing leads through all digital channels.
- **MRM (Marketing Resource Management).** The budgeting and reporting processes for marketing executives consolidate management of all asset projects plus human and financial resources to support business analytics focused on the marketing organization.
- **MPM (Marketing Performance Management).** Dashboard and reporting that consolidates data from MRM, DAM and attribution reporting to list the financial return on individual and aggregated marketing investments.
- **PIM (Product Information Management).** Maintaining all product data on one system to optimize product presentation across sales and marketing channels.
- **PRM (Partner Relationship Management).** Processes around the channel partner (reseller, distributor, etc) relationship : recruitment, registration and classification, contractual details, information exchange, and more.
- **SEM (Sales Engagement Management).** A process where marketers provide relevant digital assets to a salesperson to support their customer interactions, supported by training and coaching delivered on-demand.
- **Social Engagement and Advocacy.** Processes to manage and leverage interested parties within communities and on social media.
- **TCMA (Through-Channel Marketing Automation).** Management of brand content, plus programs and campaigns, promotions, and even leads, both down and up the distribution channel of business partners.
- **Universal Content Management.** Combination of content management, DAM and PIM into one common system of record and management. It-centric organizations call this Master Data Management.
- **WCM (Web Content Management).** The process of creating and updating content on the company website.



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