

VENDOR SELECTION MATRIX™ DIGITAL EXPERIENCE MANAGEMENT

The Top Global Vendors 2023

May 2023

ABRIDGED VERSION WITHOUT FULL SCORECARDS AND SCORES

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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 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 of vendors named spontaneously in the context of Digital Experience Management (DXM) is a broad mix of vendors with a wide variety of claims: web content management, content management systems, digital experience, through to digital commerce. The major enterprise application software vendors also offer their own DXM platform – the market feedback in report shows that their solutions are not appreciated though.

The suitability of a DXM platform varies according to whether you are a medium-sized company or a large international enterprise. Another important variable is whether the initiative is needed for a consumer business, B2B, or even to communicate internally (B2E) and we have investigated this further in the report.

This Vendor Selection Matrix™ report provides a useful guide to important Digital Experience Management market trends and names the Top Vendors as viewed by the market. These details are intended to help you make an informed decision regarding which vendors could best fit your requirements.

Enjoy reading it and reach out if you have questions. I know more than I wrote here.

Always keeping you informed! **Peter O'Neill**



Peter O'Neill

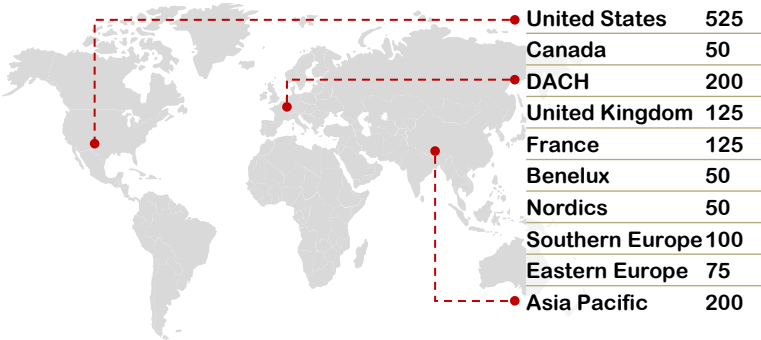
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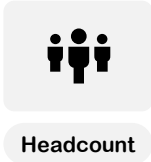
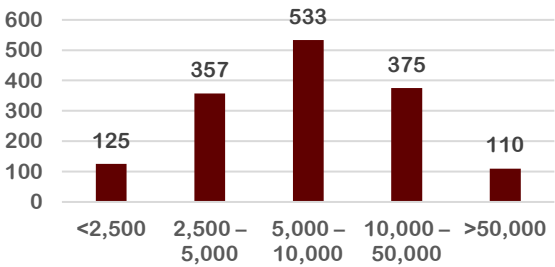
OUR SURVEY DEMOGRAPHICS: MARKETING AUTOMATION

Country Breakdown



Company Size Breakdown

(Enterprises with revenue > € 250 million p.a.)



Headcount

Industry Breakdown

Energy	95
Financial Services	255
Government & Non-Profit	90
Life Sciences	200
Manufacturing	355
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	180	VP/Director Marketing Analytics	60
Business Executive	170	Sourcing/Vendor Management	87
VP/Director Sales	145	COO	52
VP/Director Demand Generation	130	VP IT	35
VP /Director Marketing Operations	125	Chief Sales Officer	31
Corporate Marketing Executive	120	CFO	25
Chief Digital Officer	110	Chief Sales Officer	15
CIO	85	Total	1,500
VP/Director Marketing Technology	65		
CTO	65		



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.

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



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



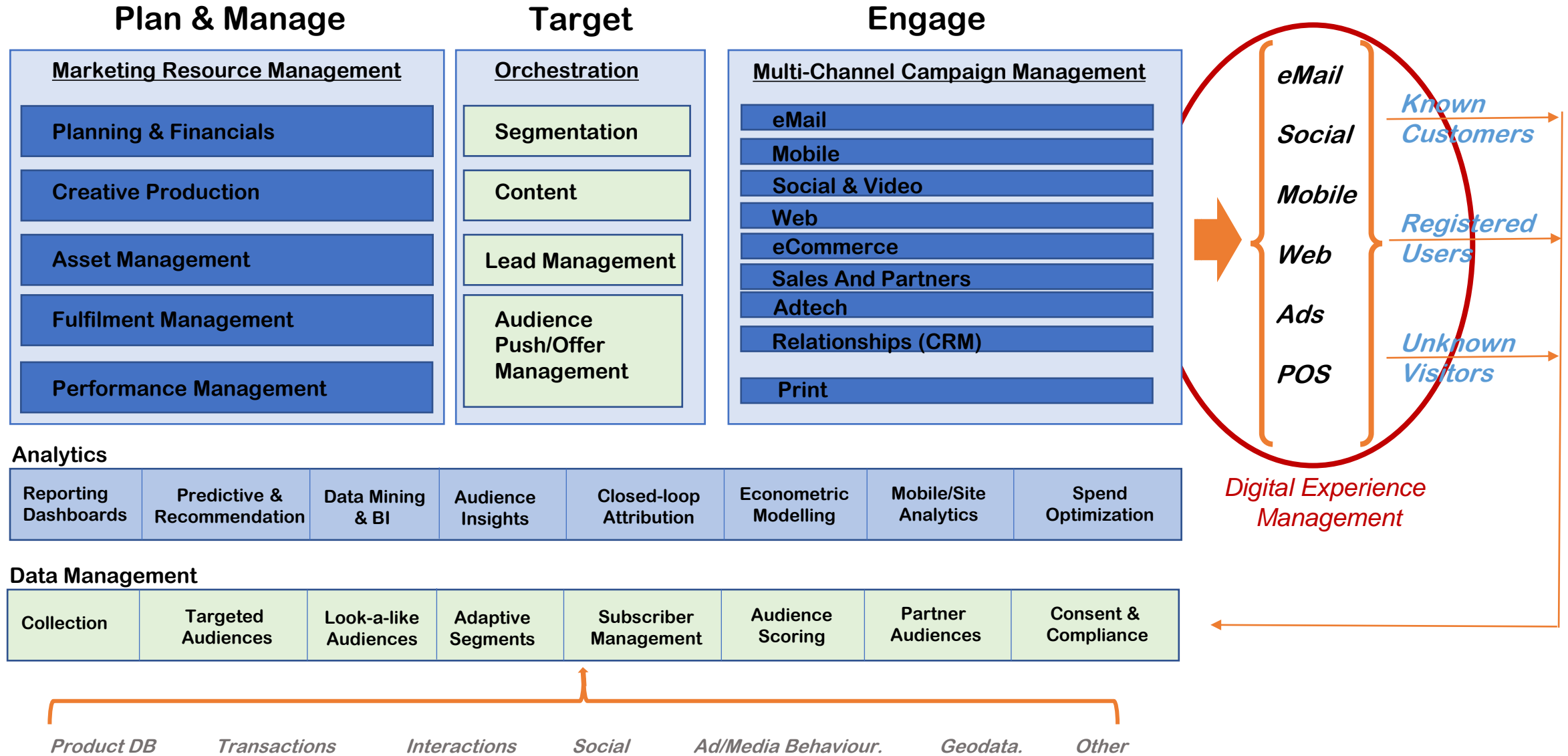
WHAT IS DIGITAL EXPERIENCE MANAGEMENT?

- The Digital Experience Management (DXM) family of processes support the composition, management, delivery and optimization of contextualized experiences offered on digital presentation platforms like websites, smartphones or other gadgets. Increasingly, these platforms are deployed within an ever-more complex, extensive and interconnected technology landscape. Businesses now need to deliver highly contextualized experiences beyond the websites and mobile apps to an increasing variety of interaction channels across the customer journey.
- It is a mature market but under disruption because of the above-named trends. DXM is used in business-to-consumer (B2C), business-to-business (B2B) and business-to-employee (B2E) scenarios, providing provide optimal digital experiences to a variety of audiences, including prospects, customers, partners, employees, citizens and students.
- Most DXM vendors have rearchitected their platforms to offer headless and/or decoupled architectures. The descriptor “headless” stands for the separation of content files from the presentation layer, allowing other applications to request content from the DXM system using APIs; applications such emails, SMS messages, video screens, augmented or virtual reality, or Internet-of-Things (IoT) devices like wearables. Leading platforms now also include other components such as analytics, social capabilities, and online forms.
- DXM processes play a leading role in eCommerce projects where the buyer experience across a myriad of channels is a critical success factor. Measuring and optimizing the “experience¹” is becoming a key business measure of success in consumer marketing as well as in both business-to-business (B2B) or business-to-business-to-consumer (B2B2C) marketing.

¹ Experience Management, see https://en.wikipedia.org/wiki/Experience_management.



THE MARKETING AUTOMATION MARKETEXTURE

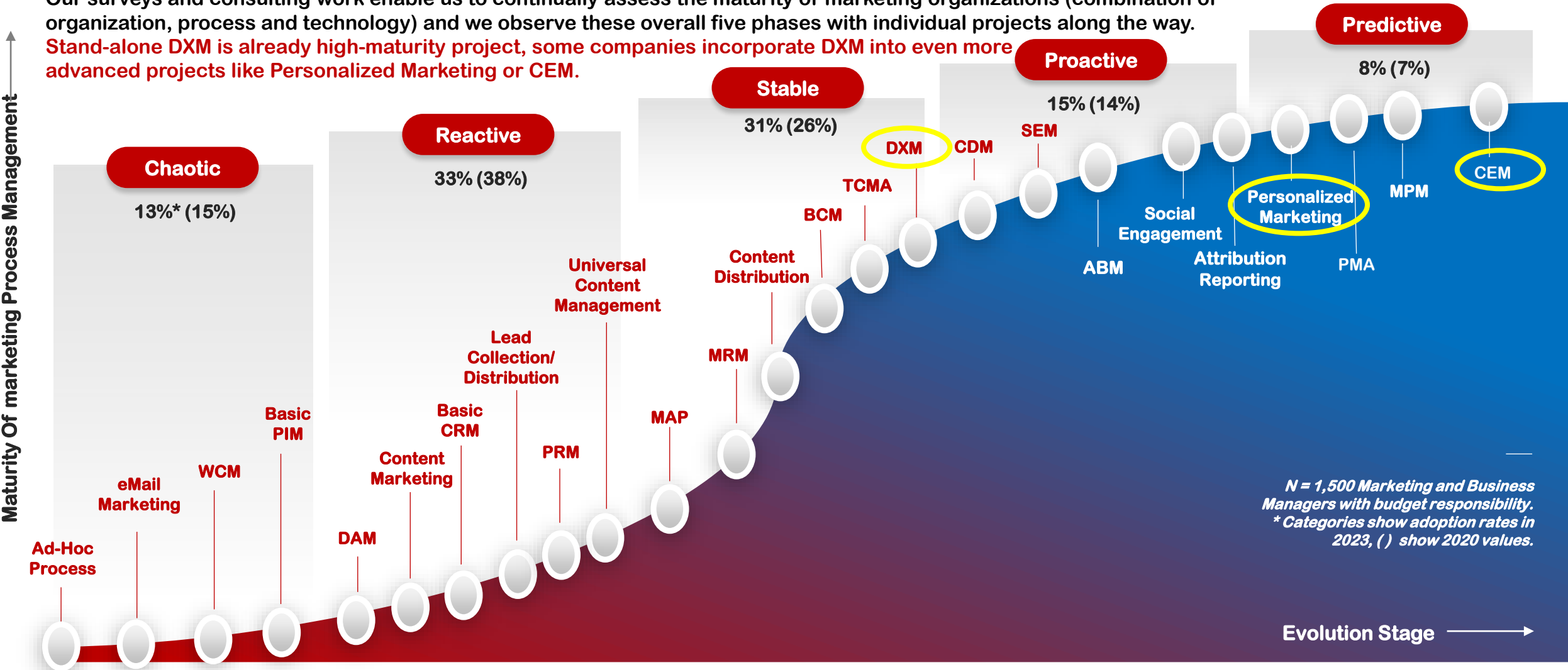


WELCOME TO MARKETING PROCESS MANAGEMENT

MATURITY S-CURVE 2023

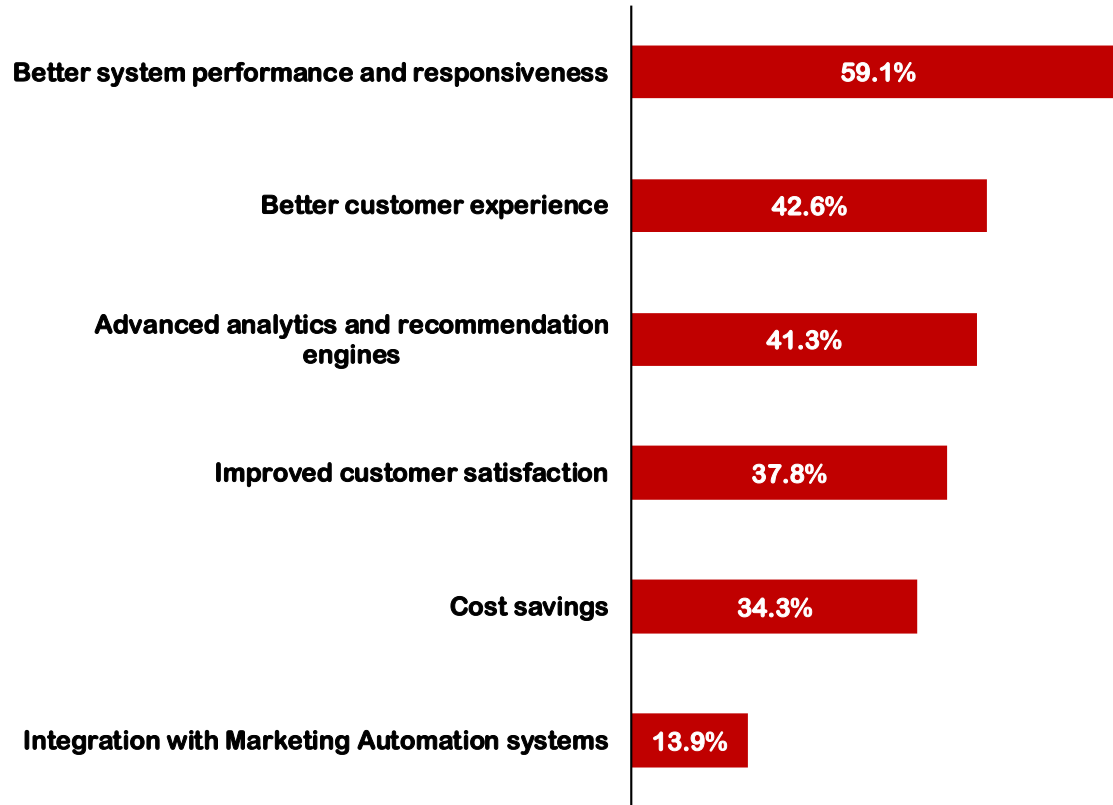
Our surveys and consulting work enable us to continually assess the maturity of marketing organizations (combination of organization, process and technology) and we observe these overall five phases with individual projects along the way.

Stand-alone DXM is already high-maturity project, some companies incorporate DXM into even more advanced projects like Personalized Marketing or CEM.



RESEARCH:

DRIVERS AND ANTICIPATED BENEFITS FROM INVESTMENT IN DIGITAL EXPERIENCE MANAGEMENT



N = 1,449 Enterprise IT and Business Managers with budget responsibilities.

First and foremost, DXM users want better system performance. There are few first-time DXM buyers left and most DXM projects are now about optimization.

We asked, “Which three key anticipated benefits are driving your investment in the Digital Experience Management automation space in the next 12 months?”.

After performance, the respondents chose **better CX, analytics and customer satisfaction** as the next priorities.

Reflecting the drive for optimization, a significant proportion of respondents interpret optimizing as **cost savings**.

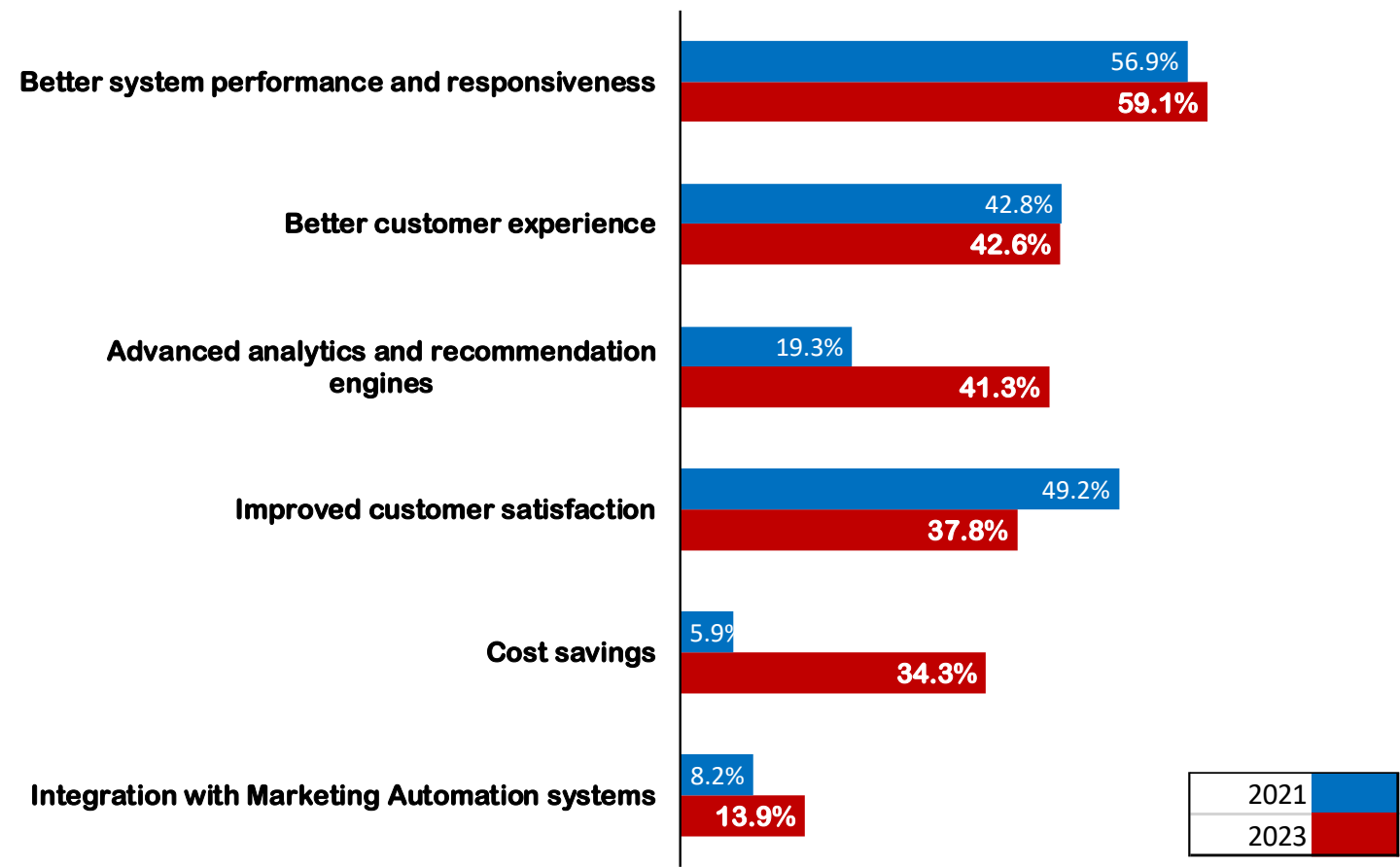
Customers no longer need DXM, they crave for **great DXM**.

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



RESEARCH:

COMPARING DXM INVESTMENT DRIVERS TODAY AND 24 MONTHS AGO



N = 1,449 (2023) and 1,384 (2021) Enterprise IT and Business Managers with budget responsibilities.

We compared the top drivers in this survey to the same question 2 years ago.

While the top 2 drivers remain consistent, reflecting the maturity of the DXM market, two drivers have increased in importance dramatically.

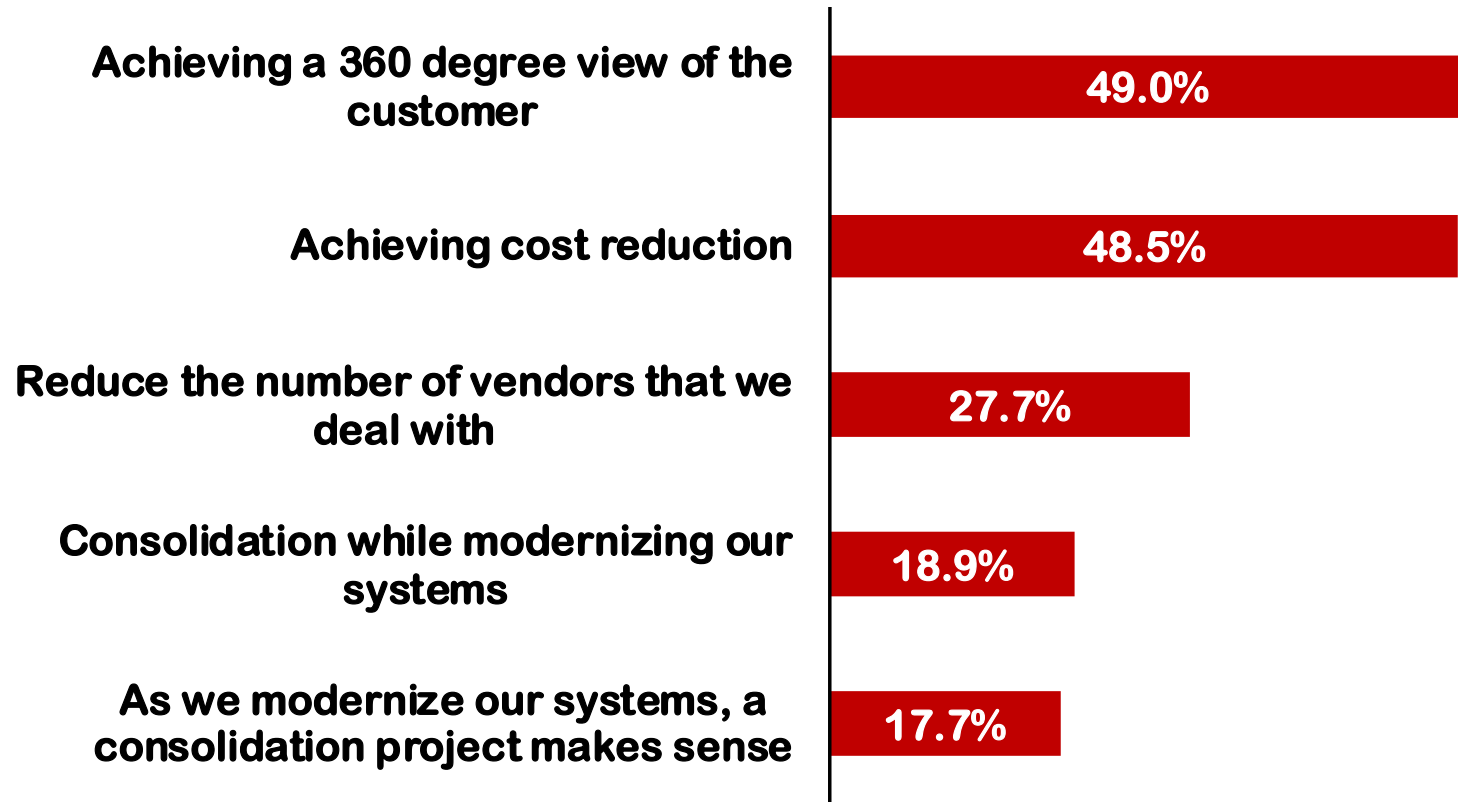
Over twice as many respondents now see **analytics** as a critical element of their DXM projects while the **cost savings** driver has multiplied almost sixfold.

The two drivers that dropped out of the top 5 were “Implementing a mobile-first strategy” and “multiple customer touchpoints”: They have become table stakes.

Buyers are most likely to engage with those DAM vendors whose market messaging addresses the current priorities.

RESEARCH:

76% OF ALL RESPONDENTS ARE CONSOLIDATING DXM, FOR THESE REASONS



N = 1,135 Enterprise IT and Business Managers with budget responsibilities.

Over three quarters of respondents confirmed that they want to consolidate their DXM systems.

We asked, “Are you consolidating your CMS, WCM, WEM, and other web delivery systems and, if so, please state why by choosing the two option(s) that closely align to your objectives.”

The top two reasons are achieving a 360° customer view and cost reduction.

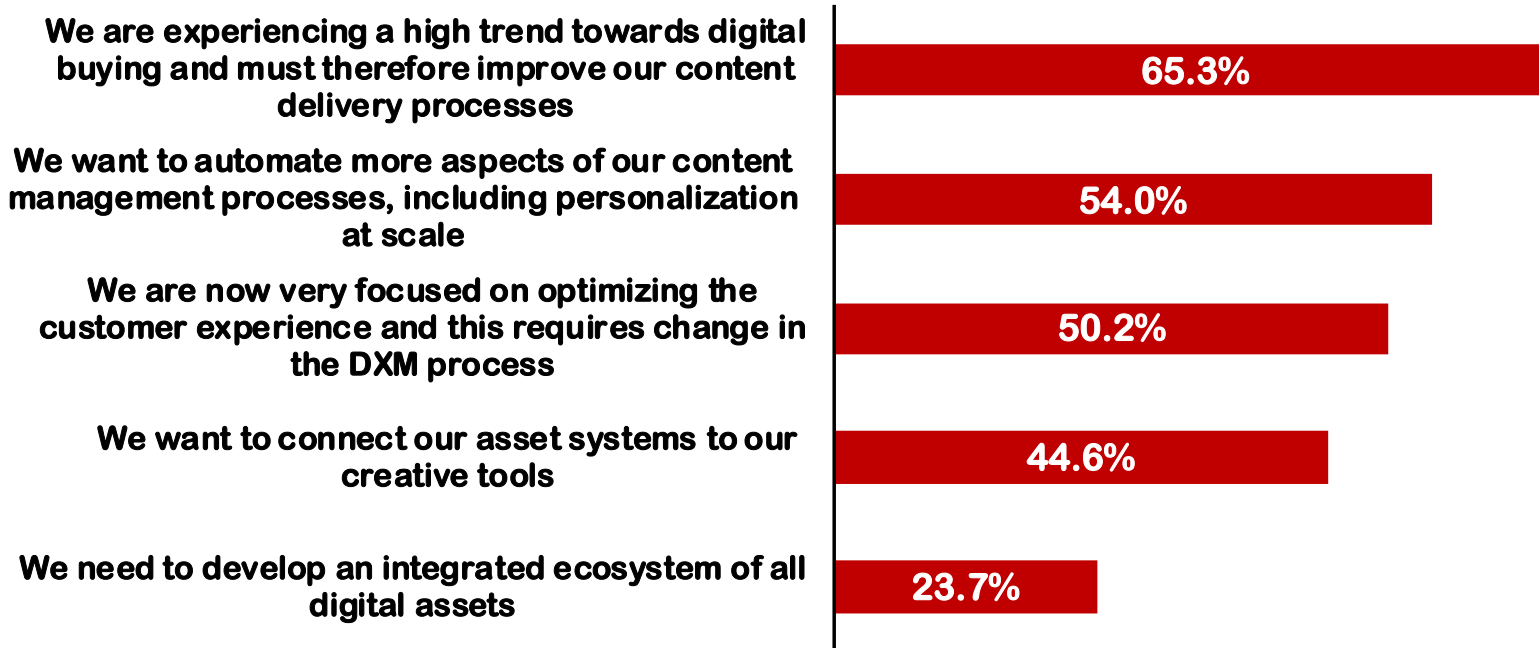
In 2021, 68% were consolidating. 80% of those cited cost savings as a reason, 49% chose achieving a 360° customer view, while reducing the number of vendors was 16% and consolidation while modernizing was 20%.



RESEARCH:

DXM IS CHANGING DUE TO THE DEMANDS OF DIGITAL MARKETING, ECOMMERCE, AND CUSTOMER PREFERENCE

Very True



N = 1,447 Enterprise IT and Business Managers with budget responsibilities.

Almost all respondents expect changes in their DXM processes in the next years, due to the demands of digital marketing, eCommerce, and customer preference.

We asked, "Please confirm each statement that applies in the following list by selecting one of the options." (the options were "Not True", "Somewhat True", "Very True".) Here are those statements selected as Very True".

Well over half cited **digital buying** and **personalization** as top drivers for change in their DXM projects.

Around a half also named **CX** and **Integration** as top drivers of change.

Buyers are most likely to engage with those DAM vendors whose market messaging addresses these needs.



INSIGHTS: TOP MARKET TRENDS 2023



Great DXM is the cornerstone of successful marketing.

The COVID-19 crisis forced businesses in all sectors to accelerate their digital transformation plans and cater to a market that prefers to interact and buy digitally. This invariably results in a DXM project; either to replace the existing DXM or WCM platform, or to consolidate.

An important factor is now the ease with which integrations can be built between DXM and applications using the content. Some applications are backend systems, others are enterprise-built applications that render content into new channels. Prebuilt connectors to common ERP, CRM, marketing automation, and e-commerce applications are now required.



New-gen citizen programmers are taking over from professional services providers.

Traditional web content management had required extensive professional services, often doubling the overall cost of a project. Modern DXM platforms are lighter and easier to use, often in-house.

In addition, adopting a Cloud version further reduces both cost and complexity. Some DXM solutions even have functions that can be controlled by specialists in the marketing department instead of requiring IT resources.

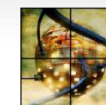
Next-gen DXM is also an organizational initiative: one of the keys to great CX is changing the overall culture from siloed to connected.



The DXM vendor landscape is rich and dynamic, but less can often be more.

The greater interest in DXM is reflected in an increasing number of vendors offering solutions, especially as other technology areas are consolidating. Even the large enterprise application vendors have DXM claims but the market response, as shown in this survey, is not appreciative.

Many DXM offerings are extensive but often not the right answer for an enterprise that already has systems in place. So, a solution providing fewer capabilities is often selected instead, which tends to mystify the losing vendor(s) but is understandable; buyers will not pay for features they do not need.



VENDOR SELECTION MATRIX™

DIGITAL EXPERIENCE MANAGEMENT



These are the Top 15 vendors and/or brands selected by 1,500 users from buyer companies in the context of Digital Experience Management, based upon product, company and service quality.

VENDOR NAME	PRODUCT(S)
ACQUIA	Acquia Open DXP
ADOBE	Adobe Experience Cloud
BLOOMREACH	Commerce Experience Cloud
CONTENTFUL	Contentful Platform
COREMEDIA	CoreMedia Content Cloud
CROWNPEAK	Crownpeak Digital Experience Platform
IBEXA	Ibexa Digital Experience Platform (DXP) (focused for B2B companies)
KENTICO	Kentico Xperience (PaaS), Xperience by Kentico (SaaS)
LIFERAY	Liferay Digital Experience Platform
MAGNOLIA	Magnolia, Magnolia Marketplace, Magnolia PaaS
OPENTEXT	OpenText Experience Platform
OPTIMIZELY	Otimizely Digital Experience Platform
ORACLE	Oracle Advertising & Customer Experience Platform
SITECORE	Sitecore Experience Platform (XP)
SQUIZ	Squiz DXP

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 full vendor scorecard will not be written.

This listing is alphabetical and includes all relevant DXM solutions named by the survey respondents.

For this report we interviewed 1,500 enterprise IT 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.

Additional vendors that were cited but did not list in the Top 15:

- SALESFORCE
- SAP
- HCL SOFTWARE
- SDL
- PROGRESS

In 2021, Coremedia acquired e-Spirit (a Market Leader in the 2021 Vendor Selection Matrix™) and has a multiyear roadmap to enhance and modernize its core offering with those assets.



VENDOR SELECTION MATRIX™

DIGITAL EXPERIENCE MANAGEMENT SOLUTIONS



Vendor Quick Facts

VENDOR NAME	Market Presence	Growth Rate	Customer Traction	GOOD TO KNOW
ACQUIA	Very Big	Very High	Strong	Providing freedom from the software monoliths
ADOBE	Very Big	High	Strong	Helping customers to achieve personalization at scale
BLOOMREACH	Medium	Medium	Medium	Powering connected digital experiences for people and business.
CONTENTFUL	Small	Medium	Medium	A next-generation content platform powering great digital experiences.
COREMEDIA	Big	Medium	Medium	Enabling teams to create powerful digital experiences.
CROWNPEAK	Big	High	Good	Deliver stunning digital experiences on any channel with a cloud-native platform.
IBEXA	Medium	High	Good	Helping B2B firms to transform traditional sales strategies into frictionless buying experiences.
KENTICO	Small	Medium	Medium	Minimize overhead and maximize ROI with a hybrid headless digital experience platform.
LIFERAY	Small	Medium	Medium	Create custom digital experiences without sacrificing speed, flexibility, or cost.
MAGNOLIA	Big	Very High	Strong	Simplifying the management of digital experiences across brands, markets, and channels.
OPENTEXT	Big	Medium	Medium	Create customers for life by delivering intelligent, relevant and efficient omnichannel experiences.
OPTIMIZELY	Medium	High	Good	Help digital teams to create & optimize exceptional customer experiences.
ORACLE	Very Big	Medium	Medium	Personalized experiences with a unified, cloud-based CMS.
SITECORE	Big	Medium	Medium	Nurture customers through their journey with personalized content in real-time.
SQUIZ	Medium	Medium	Medium	Open, fast and flexible technologies that build digital services and define a customer experience.

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%	<ul style="list-style-type: none">› Does the solution cover all necessary capabilities expected by customers?
 Market Share And Growth	15%	<ul style="list-style-type: none">› How big is the company's market share and is it growing above the market rate?
 Customer Satisfaction	25%	<ul style="list-style-type: none">› How satisfied are customers with the solution and the vendor today?
 Price Versus Value Ratio	30%	<ul style="list-style-type: none">› How do customers rate the relationship between the price and perceived value of the solution?

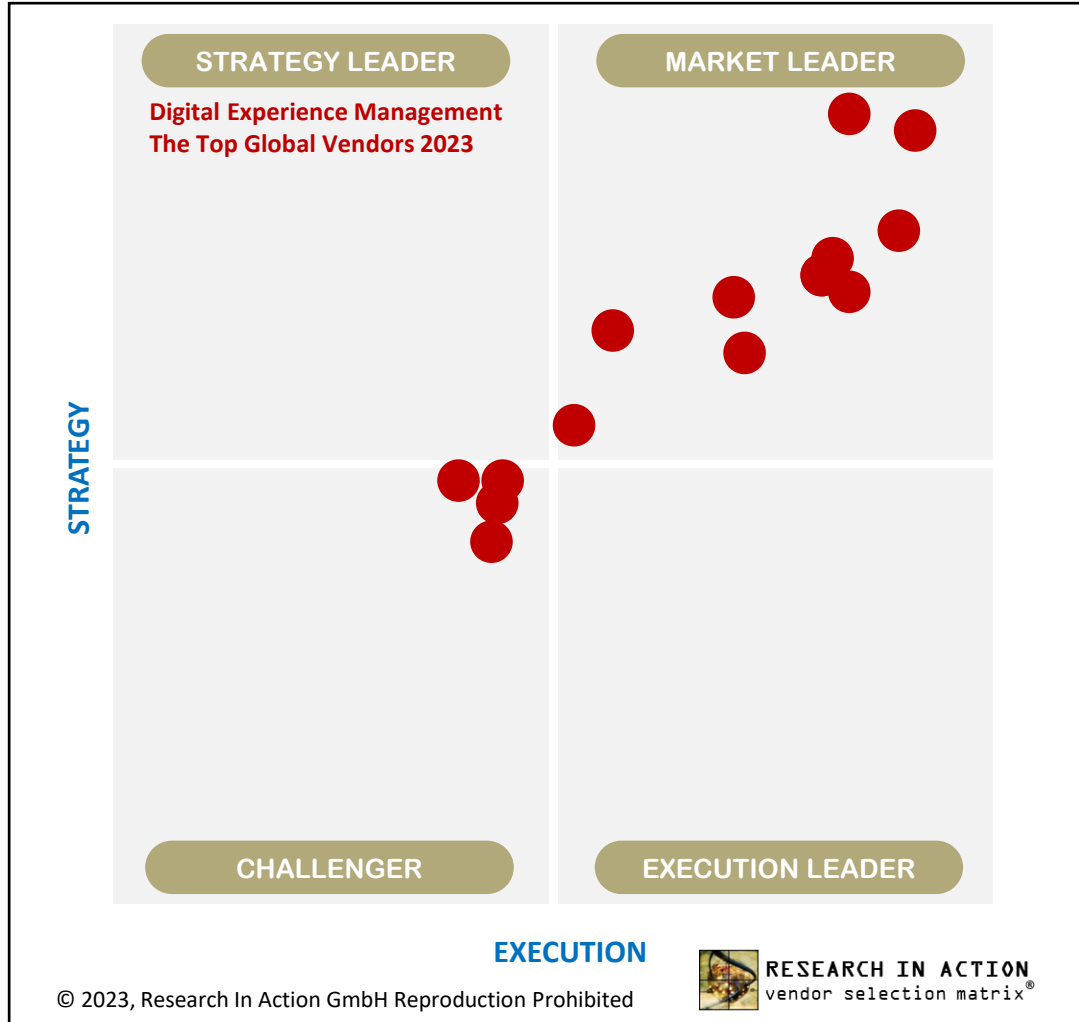
NOTES:

- 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™

DIGITAL EXPERIENCE MANAGEMENT



Market Leaders

ACQUIA
ADOBE
BLOOMREACH
CONTENTFUL
COREMEDIA
CROWNPEAK
MAGNOLIA
OPENTEXT
OPTIMIZELY
ORACLE
SQUIZ

Challengers

IBEXA
LIFERAY
KENTICO
SITECORE

Note: Vendors are listed alphabetically.



VENDOR SELECTION MATRIX™

DIGITAL EXPERIENCE MANAGEMENT

Acquia is a market leader for Digital Experience Management, helping to manage complex content and build exceptional customer experiences.



GENERAL

Founded in 2007, ACQUIA is the pioneering leader in Open-Source based Digital Experiences. After a majority investment from Vista Equity Partners in 2019, it has accelerated its growth including acquiring a series of software vendors to build out a solid solutions portfolio under Open DXP, consisting of a broad feature set that encapsulates and extends the capabilities of the open-source Drupal CMS. Open DXP enables marketers, developers and IT operations teams in thousands of global organizations to compose and deploy digital products and services that engage customers, enhance conversions, and improve digital and offline customer experiences. This includes its highly scalable Drupal web hosting, hybrid/headless CMS, CDP, with identity resolution engine, personalization, distributed / channel marketing automation and DAM and PIM capabilities.

BOTTOM LINE

Open-Source software is now an established alternative for many businesses, small or large, particularly those with enough IT developer resources to optimize software for their purpose. The vendor is most successful in B2C mid-market and enterprise companies in Financial Services, Education, Pharma, CPG, Media and Services, Retail, and Healthcare. ACQUIA has now become an established portfolio vendor for both digital experience management, marketing automation and even full digital commerce through partner solutions. Its innovative product structure and composable architecture effectively delivers a “freedom from software monoliths”. It has clear business-benefit oriented messaging for both the CIO and CMO and ACQUIA is probably one of the fastest growing vendors in this market.



VENDOR SELECTION MATRIX™

DIGITAL EXPERIENCE MANAGEMENT

Adobe is a market leader for Digital Experience Management, enhanced with cutting edge intelligence to order, adapt and publish rich experiences across all the customer journey.



GENERAL

ADOBE is the world's largest vendor focused on marketing software, with HQ in California. Its DXM functions are offered within the Adobe Experience Cloud solution family including Adobe Experience Manager (AEM) for assembling and delivering personalized content-led experiences, and Adobe Experience Platform, which provides a centralized and connected data foundation and unified profiles. The unified profiles can even update in real time and use AI-driven insights to help deliver the right experiences across every channel. ADOBE has made significant investments in headless CMS capabilities in the last couple years, most recently introducing a universal visual editor for headless sites authoring.

BOTTOM LINE

ADOBE is already the 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. Marketers seeking a digital experience management solution should consider ADOBE if they are using the vendor's products in other areas. If further ADOBE systems are installed, the advantages of using AEM are much more significant, as it is available as an embedded system to many other users in the marketing community. The native integration with Creative Cloud enables creatives to complete their work much faster and more efficiently. Through integration with Adobe Journey Optimizer, marketers can quickly and easily find the assets they need to create rich customer experiences.



VENDOR SELECTION MATRIX™

DIGITAL EXPERIENCE MANAGEMENT

Bloomreach is a market leader for Digital Experience Management, enabling product experiences that power brands, manufacturers, distributors and retailers.



GENERAL

Founded in 2009, BLOOMREACH is based in California, USA. Its flagship product, Commerce Experience Cloud, combines AI-driven search, merchandising and SEO tools with a next-generation Content Management System and omnichannel marketing platform. The vendor has introduced the concept of “conversational commerce” to emphasize its strength in enabling personalization across every marketing channel. BLOOMREACH’s declared goal is to become the undisputed leader in commerce personalization. The solution is available as a hybrid Cloud offering (some elements as SaaS, others as PaaS) and is most often used for B2B and B2C use cases. BLOOMREACH has over 900 employees and powers more than 1,400 brands.

BOTTOM LINE

BLOOMREACH is managed by a set of experienced executives into all areas of the company and is well placed to be able to take market share from legacy vendors such as Adobe, Oracle, OpenText , and Sitecore. In the last years, their average deal size has risen significantly due to increased success in the enterprise segment. With a clear focus on enriching digital commerce experiences with data and AI, BLOOMREACH can rely on its product strength in content creation, customer journey management, digital commerce, and search, including developer tools and support.



VENDOR SELECTION MATRIX™

DIGITAL EXPERIENCE MANAGEMENT

Contentful is a market leader for Digital Experience Management, enabling product experiences that power brands, manufacturers, distributors and specialized retailers.



GENERAL

CONTENTFUL was founded in 2014 as an alternative to monolithic, web-focused, content management systems claiming; “our content platform enables teams to power content in any digital product”. The vendor offers an API-based content management platform that allows businesses to create, manage and publish content on digital channels. Headquartered in Berlin, Germany, it now has over 850 employees and serves hundreds of enterprises around the world. Extremely well-funded as a private company, CONTENTFUL's latest funding round was a Series F for \$175 million on July 2021 (bringing the total up to over \$300 million).

BOTTOM LINE

CONTENTFUL is a great fit for progressive digital marketers and developers, especially at companies with a multitude of communication channels. An impressive 28% of the Fortune 500 is now building its content with CONTENTFUL software. Their most powerful reference story is empowering the Canadian telco Telus to launch the new iPhoneX on 33 websites and apps, publishing even before Apple itself could complete its project! They are very likely to be considered as a migration path for many large incumbent older-generation web experience management customer sites who are concerned about TCO and talent availability.



VENDOR SELECTION MATRIX™

DIGITAL EXPERIENCE MANAGEMENT

Coremedia is a market leader for Digital Experience Management, enabling product experiences that power brands, manufacturers, distributors and specialized retailers.



GENERAL

Headquartered in Hamburg, Germany, with nearly 200 employees, COREMEDIA has a strong customer base in EMEA with some presence in North America. Its major customers are in the communications/media, B2B manufacturing, and retail sectors. Typical of many European vendors, the vendor often also works as an agency or project house, building a full content experiences for its customers. In 2019, private equity firm OpenGate Capital took a controlling stake in COREMEDIA with the intent of modernizing the software portfolio based on MACH Alliance principles.

BOTTOM LINE

The vendor can provide comprehensive support for globalization, internationalization, localization and translation, as well as scaling capabilities that support complex global brand rollouts. This strength in supporting global multisite operations provide a solid platform to ensure brand consistency with multichannel output (for example, social selling). COREMEDIA therefore has an extremely focused go-to-market strategy, with a specialty for digital-commerce-driven use cases.



VENDOR SELECTION MATRIX™

DIGITAL EXPERIENCE MANAGEMENT

Crownpeak is a market leader for Digital Experience Management, enabling product experiences that power brands, manufacturers, distributors and specialized retailers.



GENERAL

Headquartered in Denver, CO, CROWNPEAK's Cloud-first Digital Experience Management (DXM) provides content management, personalization, search and hosting. In 2021, it acquired the DXM vendor E-SPIRIT in Germany. This merger combines the strengths of two long established DXM vendors. The new organization has over 200 employees and a truly global footprint, with offices in North America, Europe (London and Dortmund, Germany) plus Singapore to cover the APAC region. The two vendors were very compatible in that respect: CROWNPEAK had a more North America-centric customer base; E-SPIRIT started in Germany with most customers in Europe.

BOTTOM LINE

There was some overlap in product offerings as both have a Content Management System and support Digital Experience Management. CROWNPEAK is strong at B2C use cases, while E-SPIRIT is strong in B2B. While the CROWNPEAK product set is built on .NET technology and strongest of all in the content management aspects of DXM, the E SPIRIT software is built on Java technology and strongest for its AI-powered personalization, search and integrations into ecommerce platforms.



VENDOR SELECTION MATRIX™

DIGITAL EXPERIENCE MANAGEMENT

Magnolia is a market leader for Digital Experience Management, simplifying the management of digital experiences across brands, markets, and channels.



GENERAL

MAGNOLIA, founded 1997, is a privately-held company headquartered in Basel, Switzerland. It has a global reach, with 13 offices around the world and some 200 employees from over 30 nationalities serving around 450 customers in over 100 countries. The Magnolia Digital Experience Platform powers the digital presence of some of the largest companies in the world with capabilities that include content management, personalization and search. It is deployed by midsize and large organizations in a broad range of verticals, with some focus on banking, travel and hospitality, and media and communications. The headless concept of the MAGNOLIA solution allows customers to use the best tool for each of their tasks in DXM.

BOTTOM LINE

As a robust content hub, MAGNOLIA is most suitable for companies with multiple channels for engaging with customers; requiring multiple data sources and services to unify and personalize the channel experience; and having advanced editorial needs (multiple content types, languages, scheduling, workflows and personalization). It is particularly interesting for international enterprises with distributed teams and multiple markets as MAGNOLIA's multilingual capabilities provide benefits for editors and not just consumers or end-users: Allowing every business user to see the interface in their language to prevent misunderstandings.



VENDOR SELECTION MATRIX™

DIGITAL EXPERIENCE MANAGEMENT

OpenText is a market leader for Digital Experience Management, enabling clients to create customers for life by delivering intelligent, relevant and efficient omnichannel experiences.



GENERAL

OPENTEXT is headquartered in Canada and has a global presence. Its DXM solution is OpenText Experience Platform, including analytics, content management, DAM, personalization, and optimization. It is available on-premises or can be hosted on a public cloud (Microsoft Azure, Amazon Web Services or Google Cloud), or on a private cloud through OpenText Private Cloud Services. Some legacy clients operate it as a fully managed service. OPENTEXT software is used in a variety of sectors, including government, FSI, manufacturing, and retail.

BOTTOM LINE

OPENTEXT messaging is primarily focused on the concept of Information Management, a very IT-centric view of the world. However, there is a large population of experienced, and satisfied, OPENTEXT customers and partners incumbent in many enterprise IT organizations and which will ensure that the vendor continues to be a leader in its market. OPENTEXT's expertise in serving organizations in highly regulated industries makes it a good choice for buyers needing governance, security, account management and auditability in authenticated experiences.



VENDOR SELECTION MATRIX™

DIGITAL EXPERIENCE MANAGEMENT

Optimizely is a market leader for Digital Experience Management, helping digital teams to create & optimize exceptional customer experiences.



GENERAL

The vendor Episerver was founded in 1994 in Sweden and, in late 2021, it rebranded to OPTIMIZEELY, a vendor it had 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 web and commerce sites. The Digital Experience Cloud platform includes solutions for managing content, campaigns, experiments, and digital commerce. It is available as PaaS and SaaS.

BOTTOM LINE

OPTIMIZEELY has the opportunity to 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.



VENDOR SELECTION MATRIX™

DIGITAL EXPERIENCE MANAGEMENT

Oracle is a market leader for Digital Experience Management, with campaign design, advanced lead scoring, real-time firmographic data, and integrated sales tools.



GENERAL

ORACLE is one of the largest software providers in the world, headquartered in California, and its marketing software is used by many enterprises who have large contact databases and moderate-to-sophisticated requirements. ORACLE's customer experience solution helps marketers understand, acquire, and retain customers with connected data and intelligence, all with one solution. The solution consists of several products acquired over the last years: Eloqua, Responsys, BlueKai, Maxymiser, Infinity, and Content and Experience. Over time, these products will be tightly integrated and then the complete package is very impressive and compelling.

BOTTOM LINE

ORACLE presents a visionary marketing Cloud concept for the modern marketer with a clear focus on the enterprise market, but it is also presented often by ORACLE generalist salespeople who are not so well versed in the details of marketing automation. Research analysts tend to rate ORACLE highly in their waves and quadrants, based on the strong executive briefings they receive. Hopefully, as marketers' needs extend to data integration and AI, ORACLE will be able to meet their needs better. After all, the vendor is still voted as a market leader.



VENDOR SELECTION MATRIX™

DIGITAL EXPERIENCE MANAGEMENT

Squiz is a market leader for Digital Experience Management, with open, fast and flexible technologies that build digital services and define the customer experience.



GENERAL

Formed in 1998, SQUIZ originally developed an Open-Source software that offered enterprise class content management systems with Personal Home Page databases. The current offering, Squiz Digital Experience Platform, includes Cloud, content management, web search and analytics, an integration platform and a data platform. SQUIZ also offers Squiz Workplace, a cloud-based platform for employee engagement sold in ANZ, and Squiz Edify, a cloud-based portal that improves student engagement, sold in the US. The Squiz DXP is used mainly for B2C and B2E use cases, and to a lesser extent for B2B. The vendor is based in Sydney, Australia, and has offices in New Zealand, the U.K., Europe and the U.S..

BOTTOM LINE

SQUIZ is a Market Leader in this matrix because it provides a cost-effective and open digital experience platform with the ability to integrate with a wide range of applications. Its capabilities allow it to compete effectively with the largest of proprietary vendors when the customer is using software from multiple other vendors because the vendor's open architecture philosophy means customers can deploy the entire platform or a single component in a best-of-breed approach common to modern web developers. The vendor is still at the beginning of its recruitment drive to build a global ecosystem of implementation, technology and agency partners, so implementation resources are not yet available in all required regions.



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 Experience 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.
- **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

- **MAP (Marketing Automation Platform).** 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 consolidating 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.
- **Personalized Marketing.** Digital marketing programs that provide responsiveness and deep personalization.
- **PIM (Product Information Management).** Maintaining all product data on one system to optimize product presentation.
- **PRM (Partner Relational Management).** Processes around the channel partner (reseller, distributor, etc) relationship : recruitment, registration and classification, contractual details, information exchange, and more.
- **PMA (Partner Management Automation).** In an “as-a-service” business model based upon digital interactions channel partners are even more influential and advocational. As well as resellers/distributors, we have partners called affiliates, referrers, associations, commerce content providers, communities, groups, ambassadors, and more. PMA is the aggregation of PRM and TCMA.
- **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.



THE RESEARCH IN ACTION GMBH VENDOR SELECTION MATRIX™ METHODOLOGY

Vendor Selection Matrix™ Disclaimer:

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