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Compass Guide to WCM, Q1 2019
Evaluation of Adobe Experience Manager Sites

By: Tony White

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Adobe Experience Manager Sites 6.4 Product Evaluation

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ARS LOGICA POSITION

Adobe Experience Manager (AEM) Sites has long been a leader in the WCM market. Its content marketing tools rank first among all platforms evaluated, and the vendor co-leads the industry for momentum and strategic vision. Technically, AEM's development tools also take an industry first place, and its extreme scalability place it among the top two WCM offerings. Functionally full-featured and technically mature, AEM enjoys a unique position alongside Adobe's other Cloud applications, which together comprise the most complete digital engagement platform available.

NOTES & RESOURCES

Sources of Information
Some company and product information contained in this report was collected via Ars Logica's 172-item vendor questionnaire. Vendor responses were independently verified through customer interviews, implementation monitoring, product documentation, Ars Logica's knowledge base, and hands-on product testing.

Platforms Included
The Compass Guides include the platforms that Ars Logica considers to be the most significant in the WCM market. While scores on our business and technology scorecards vary widely, each platform evaluated will be a best-fit given the right use case, and may therefore prove worthy of shortlisting.

Customer Interviews
Ars Logica has interviewed users of every product covered in the Compass Guides, including Adobe Experience Manager Sites.

Implementation Monitoring
Since the 1990s, Ars Logica founder Tony White has kept close tabs on ongoing WCM implementations. Some of this knowledge is represented in the Compass Guide reports.

No Vendor Influence
Ars Logica retains complete editorial control over the Compass Guides and receives no funding in their production.

Adobe Vendor Overview

Adobe is a technology vendor with deep expertise in two broad areas: creative applications for both individuals and enterprises, and experience-driven software and services for enterprises. The former include longtime standards such as Photoshop, Illustrator, InDesign, Premiere, Dreamweaver, et al., and the latter brings together three large platforms now known as Marketing Cloud, Analytics Cloud, and Advertising Cloud. While Adobe is perhaps best known for its Acrobat and former Creative Suite products, Ars Logica's interest in the company relates mostly to what was formerly known as its Enterprise and Developer Business Unit, which assumed responsibility for Day Software's CQ5 when Adobe acquired Day in 2010. Adobe is almost indisputably the software industry's pre-eminent technology vendor in both of its core competencies.

Company Profile

Year Founded: 1982

Headquarters: San Jose, CA

Employees (or FTE equivalents): 21,350

Geographies: Global

Revenue: $9.0 billion

Product Types Offered: Digital experience management, creative

Commercial or Open Source: Commercial

Strategic Implementation Partners: Accenture, Axis41, Cognizant, Deloitte Digital, IBM iX, Mirum, PwC Digital Services, SapientRazorfish, VML, XumaK

Top Competitors: Acquia, BloomReach, Episerver, OpenText, SDL, Sitecore

Key Vertical Industries: Consumer packaged goods, financial services, healthcare, insurance, media & entertainment, retail, technology, travel & tourism

Product Profile

Product Name: Experience Manager Sites

Version: 6.4

Next version release date: Q2 2019

Market segment: Enterprise

Average Sales Price (License Only): $350,000

Technology Platform: Primarily Java

Key Strengths: Industry's best content marketing tools, rich development environment, excellent usability and UI quality, extreme scalability, machine learning capabilities (Sensei), market momentum and strategic vision

Key Limitations: Implementation complexity, resource-intensive system maintenance, price, vendor's market insight and product strategy outpace its ability to execute

Highest-Value Use Case: Global deployment of omni-channel digital engagement initiatives

Vendor History & Product Evolution

Adobe traces its origins to 1982, when it was founded as a company dedicated to developing a standard computer printing language, which took the form of PostScript. The rest of Adobe's early history included the development of a range of digital fonts, along with its first consumer products, Illustrator and Photoshop. Ars Logica's interest in Adobe, however, relates to the company's former Enterprise Business and Developer Unit, which became the curator of Day Software's CQ5 when Adobe acquired Day in 2010.

First released in 2001, Day Communiqué -- the predecessor of AEM, Adobe CQ5, and Day's multiple CQ versions -- was revolutionary for its ability to unify middleware, content management, and portal software. For its early users, Communiqué often became the locus of control over disparate corporate data sources. The middleware-like capabilities of Communiqué came from Unify, a virtual repository using a software bus architecture that rendered data from practically any source usable. Large enterprises had long found themselves navigating a sea of middleware in attempts to make enterprise information consumable by single software platforms, and Communiqué pioneered in this area.

Having served IT departments almost exclusively, Day decided in 2006 to invest in making its user interfaces user-friendly. The result was that, in November 2008, after a complete UI overhaul, CQ became relevant to business users. By 2009-2010, the platform was enjoying such widespread acclaim among customers that Adobe opted to acquire the company.

Since the mid-2010 acquisition of Day Software, Adobe has remained among the top few vendors in the WCM market. This report details why AEM Sites currently finds itself – depending on the weighting of evaluation criteria – at or near the front of the pack.

Key Recent Developments

Four enhancements both to AEM and Adobe's "Clouds" top the list of key recent developments: (1) New cross-cloud integrations (using Adobe's Cross-Cloud APIs) allow AEM's digital asset management to automatically identify and synchronize content between the Marketing, Analytics, and Advertising Clouds. (2) AEM and Microsoft Azure are now available as a joint solution. (3) All of Adobe's Clouds now incorporate dynamic content meta-tagging. (4) Sensei, Adobe's artificial intelligence technology, increasingly collapses barriers between channels (including virtual vs. physical) in the customer journey. This is of extreme relevance to AEM content within the broader context of digital marketing, and it underlies Adobe's "Fluid Experience" messaging. In version 6.4, Adobe has tighened the integrations between its creative and marketing platforms, allowing for unified workflows between design teams, marketers, and data analysts.

Profiling the Ideal Buyer

The ideal buyer of AEM Sites will be seeking a solution beyond Sites itself, and likely beyond AEM – the more "beyond," the more ideal. The most obvious prospective customer is the large enterprise with requirements to implement the broadest possible range of well-integrated digital marketing technologies with which to engage audiences across all touchpoints. Less obvious, but equally ideal, is the midsize organization that relies heavily on the digital component of its brand and virtual nature of its customer in-teractions. The common characteristic among satisfied AEM customers is willingness to accept the pre-made technology choices inherent in a suite-based platform. Strongly IT-driven organizations and those with cultures of frequent ad hoc software development often opt for best-of-breed platforms.

- **Large enterprises with broad digital marketing requirements**
  Because of its price, complexity, and position within Adobe's lineup beyond WCM, AEM Sites is best suited to large companies looking to implement and integrate a wide range of enterprise digital engagement technologies.

- **Midsized organizations that rely heavily or solely on digital brands and virtual interactions**
  While reliance on the digital component of brands and virtual nature of customer interactions is nearly ubiquitous, organizations -- even smaller ones -- whose existence relies largely or solely on digital marketing acumen may here be able to cost-justify otherwise "much too expensive" software.

- **IT organizations that embrace the pre-made choices of a suite-based platform**
  Buyers who choose AEM Sites as their WCM solution should have IT departments that understand what it means operationally to support -- on a day-to-day basis -- a large suite-based technology platform. A degree of technical freedom is taken away in return for consistency and synergy across a wide range of applications.

Adobe Experience Manager Will Not Be a Good Fit, If...

AEM is *not* the platform for companies expecting technology to make them good marketers. Ars Logica's consulting engagements have consistently shown that creative departments with well-defined market-ing goals can use AEM to achieve them in sophisticated fashion. But creativity and marketing talent must come first. While it is a stretch to say that AEM can substitute for the good technical marketer, excellent non-technical marketers may find that AEM allows them to accomplish marketing goals which IT depart-ments would otherwise declare unfeasible. The most important take-away from this section is this: AEM – more than any other platform – requires a top-to-bottom organizational understanding of the complexity of implementing successfully.

Key Product Strengths

AEM Sites is a formidable WCM platform that sits within Adobe's Marketing Cloud, which when accompanied by Analytics Cloud, Advertising Cloud, and Adobe Core Services, constitutes Adobe's broadest offering -- Experience Cloud. In the four categories in our evaluation criteria for business users, AEM Sites garners a first, co-first, and second-place ranking. Similarly, in the four categories for technologists, the product achieves a first and third-place ranking. AEM is clearly one of the top two offerings in the WCM market – its fit with particular use cases will depend on the weightings of selection criteria.

AEM Sites boasts the industry's best content marketing tools (see Page 11). The importance of this selection criterion cannot be overstated. Ars Logica finds in its consulting engagements that this diverse functional category typically gets a 40 percent weighting among criteria for non-technical users.

Similarly, the platform excels in usability and interface quality, garnering a second-place ranking among all platforms evaluated. For some clients, UI considerations trump all other evaluation criteria because poor user adoption rates can almost single-handedly doom implementation success. Products with good usability and otherwise average functional scores are often regarded more highly by customers than technically excellent products with average or poor usability. In the words of one client, "Why would we spend half a million dollars on a product that nobody wants to use?"

FIGURE 1 Adobe Experience Manager Sites 6.4, Key Product Strengths and Limitations

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Below are several key product strengths and limitations that potential buyers should keep in mind when assembling vendor shortlists.

KEY STRENGTHS	KEY LIMITATIONS
Industry's best content marketing tools (ranked first of all platforms evaluted)	Price justifiable only with usage of other Marketing and/or Experience Cloud products
Excellent development tools (ranked first of all platforms evaluated)	Implementation complexity and resource intensity of ongoing system maintenance
Vendor's market momentum and strategic vision (co-ranked first of all platforms evaluted)	Vendor's market insight and product strategy outpace its ability to execute
Superb usability and user interface quality (ranked second of all platforms evaluated)	
Extreme scalability (ranked third of all platforms evaluated)	

Source: Ars Logica, Inc.

Sources of information: product testing, product updates, customer interviews, vendor questionnaire

Next, AEM boasts excellent development tools (ranked first of all platforms evaluated). Developers will find a rich development environment in which to customize the platform, and customers will find an unprecedented number of service providers with extensive large-implementation experience. Technologists will also appreciate the platform's extreme scalability (ranked third of all platforms evaluated).

Finally, the vendor's market momentum and strategic vision (co-ranked first of all WCM vendors evaluated) have at times proven second-to-none. One slight criticism here -- above average rates of stalled or abandoned initiatives -- results from buyers' pre-purchase lack of understanding of the product's complexity. We urge customers to develop a thorough selection, planning, and implementation strategy early-on.

Key Product Limitations

First and foremost among AEM Sites' limitations is the rather extreme implementation complexity and resource intensity of ongoing system maintenance. AEM – and its predecessor, Adobe CQ5 – have witnessed exceedingly rapid evolution since 2010 when Adobe acquired Day Software. Only when customers understand the true scope of the Marketing and Experience Clouds (stemming largely from technology acquisitions with heterogeneous code bases) can this platform can be cost-justified and its complexity embraced. We have seen a number of clients whose digital marketing goals proved overly ambitious relative to their implementation preparedness and budgets (sometimes initially enough to cover product licenses alone). They have either experienced excruciating pain or outright failure. This is not so much a reflection on AEM Sites itself as it is a statement about the urgency of understanding the breadth and depth of Adobe's offerings. But when prospective customers have true omni-channel marketing goals, proper implementation strategy, sufficient product training, and adequate funding, AEM Sites is usually a logical shortlist candidate.

The price of AEM Sites can usually only be justified with the usage of other products or services in the Experience Cloud platform: Marketing Cloud (Campaign, Target, Social, Primetime), Analytics Cloud (Analytics, Audience Manager), Advertising Cloud, or Adobe Core Services (People, Places, Assets, Mobile, Activation). It is worthy of note that – as with many of the market's other leading products – some AEM components are purely SaaS-based, while others are offered as managed services.

Finally, as a logical companion to Adobe's top ranking for market momentum and strategic vision, the vendor's ability to execute has historically run somewhat behind its mental roadmap. The caveat to prospects is to verify that all of the pieces of an envisioned solution are on Adobe's pricelist – and are available for delivery – at the time of purchase.
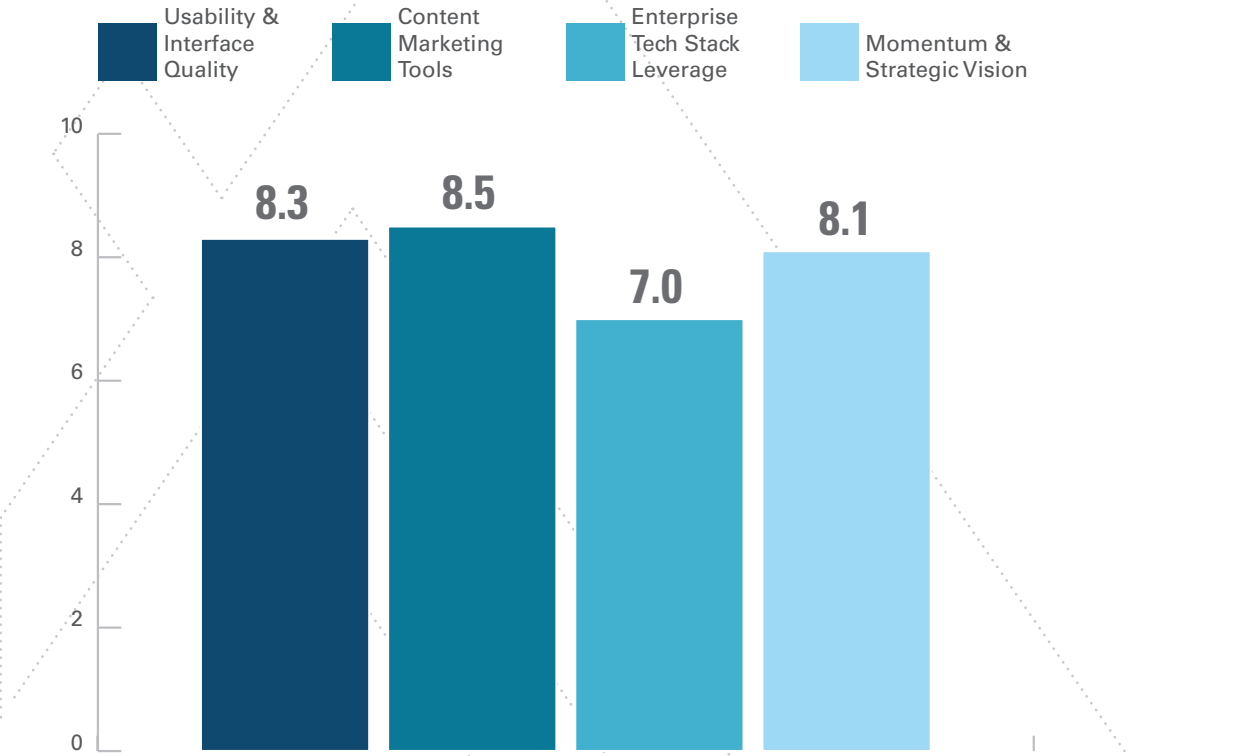
Vendor/Product Report Cards

The features, functions, and technical underpinnings of WCM products vary considerably, as do the customer requirements they are intended to satisfy. For this reason, the only reliable way to assure the best product fit for a particular client is to spend anywhere from several weeks to several months assessing the client's specific needs and analyzing product capabilities line by line. Still, Ars Logica is frequently asked to rate products in categories such as those in Figures 2 and 3. In using these ratings, please take care to weight each category in accordance with its importance to your needs. While the average scores across these categories might be the same for two products, proper weighting will likely cause the scores to diverge -- often significantly.

**FIGURE 2**   Adobe Experience Manager Sites 6.4 Report Card for Business Users

Figure 2 shows Ars Logica's rating of AEM Sites 6.4 in four WCM categories of critical importance to business users. Refer to Page 11 for an explanation of the evaluation criteria.

Sources of information: product testing, product updates, customer interviews, vendor questionnaire

FIGURE 3   Adobe Experience Manager Sites 6.4 Report Card for Technologists

Figure 3 shows Ars Logica's rating of AEM Sites 6.4 in four WCM categories of critical importance to technologists. Refer to Page 12 for an explanation of the evaluation criteria.
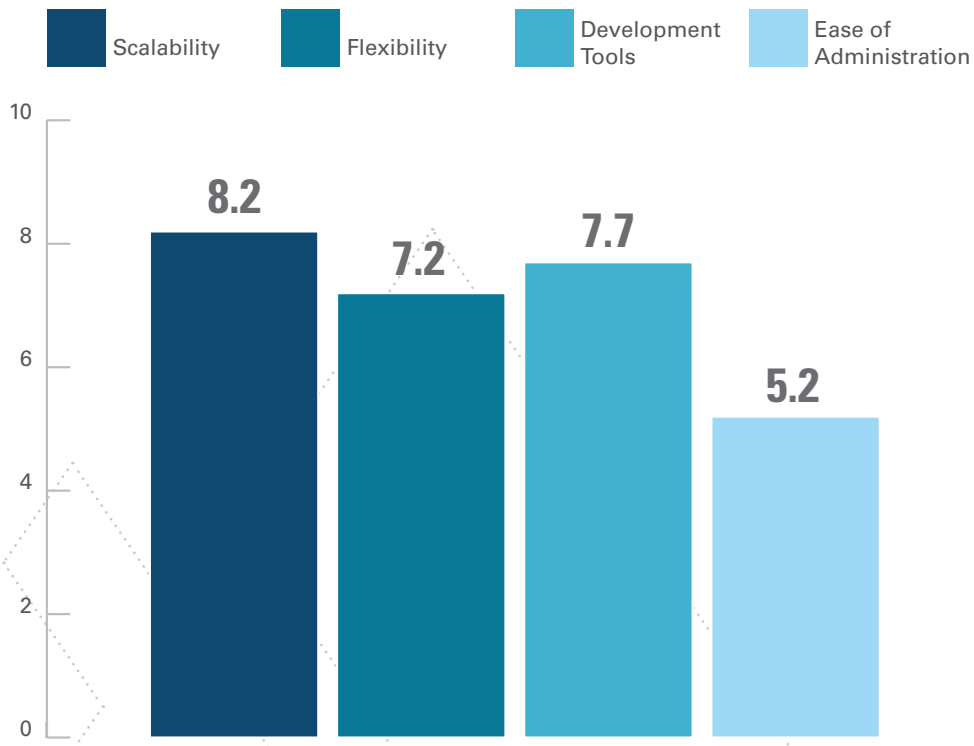
Sources of information: product testing, product updates, customer interviews, vendor questionnaire

Report Card Evaluation Criteria

In the process of analyzing WCM solutions, Ars Logica has established a set of evaluation criteria, which at the highest level can be separated into four categories for non-technical business users and four categories for technologists. Scores in these categories represent averages of a large number of detailed criteria, and are meant to be used as a means of quickly comparing products within the same market segment.

Criteria for Business Users

- **Usability & Interface Quality**
  Usability refers to the relative ease of learning and using a WCM application. For non-technical business users, factors contributing to high scores in this category include intuitive and consistent user interfaces, streamlined task completion (i.e. minimal number of steps to complete a task), integration with the desktop and between product modules, contextual editing capabilities, and documented high user adoption rates among a vendor's customers.

- **Content Marketing Tools**
  Marketers needs tools within WCM platforms to improve sales conversion rates, increase average transaction amounts, draw customers back to their websites, analyze online behavioral patterns, and deliver unique customer experiences. This category rates the presence and quality of such tools, including segmenting, targeting, testing, personalization, site optimization, and mobile support.

- **Enterprise Tech Stack Leverage**
  This category assesses a product's ability to integrate with and leverage the data and functionality of essential enterprise technology platforms such as CRM, ERP, marketing automation, e-commerce, portal, analytics, and social media management.

- **Momentum & Strategic Vision**
  This category represents a combination of a vendor's market momentum (current market share adjusted for acceleration or deceleration over the past 24 months) and the completeness of its market strategy, which includes commitment to technology and implementation partners, meaningful evolution of WCM products, and support for marketing programs.

Criteria for Technologists

- **Scalability**

  Scalability refers to the ability of a product to function well as system demands increase. Factors contributing to scalability are database size, query efficiency, bandwidth consumption, ease of system management, caching efficiency, load balancing, and mass content deployment capabilities.

- **Flexibility**

  Flexibility denotes a product's ability to integrate easily with existing enterprise infrastructure, including operating systems, Web servers, databases, directories, development tools, and other enterprise applications such as ERP, CRM, e-commerce systems, search, portals, and so forth.

- **Development Tools**

  This category describes the quality of a product's integrated development environment (IDE), the technologies that the IDE incorporates, and overall ease of customized application development. Although this category refers primarily to development frameworks, other ad hoc tools are also included, such as page- and site templating, alternate interfaces, scripting tools, configuration utilities, pre-defined coding functions, mobile development accelerators, and any other functionality that enables or eases the installation, development, and customization of WCM implementations.

- **Ease of Administration**

  Some WCM products require significantly more work to administer than others. This category rates the relative resource intensity required to keep the system running smoothly, where higher scores reflect less work. Roughly speaking, higher scores also indicate better coordination of application components due to more methodical system design.

ARS LOGICA

SERVICES

Contact

Tel: +1 617.943.5611
30 Newbury Street
Third Floor
Boston, MA 02116
consulting@arslogica.com
www.arslogica.com

Advisory Services

Ars Logica is a vendor-neutral analyst firm helping companies evaluate their digital experience requirements and select appropriate software. To address clients' questions and concerns that arise throughout the year, Ars Logica offers unlimited direct analyst access through its Analyst Anytime advisory services. These annual, subscription-based services provide guidance by phone or email within 24 hours on a wide range of issues. The number of inquiries submitted throughout the year is not limited.

Software and Technology Selection

In our technology selection engagements, Ars Logica maps clients' functional, technological, and strategic requirements to potential software platforms and identifies the vendors whose products best satisfy these requirements. We maintain a continuously updated comprehensive matrix of the feature-functionality of most digital experience vendors' products and solutions. We receive frequent briefings from these vendors and have in-depth conversations and consulting engagements with their customers, ensuring that we always understand the actual state of vendors' offerings as well as their forward-looking strategic directions.

Custom Engagements

Ars Logica's expertise in technologies such as web content management, digital experience management, digital asset management, marketing campaign management, enterprise search, and portals, gives us the open-ended ability to help clients on a wide range of projects, including: building internal business cases, assessing technology requirements, analyzing software products and vendors, selecting and assembling software solutions, crafting digital strategies, and running corporate educational seminars. We also assist vendors in developing strategic roadmaps, and we present our view of the digital experience market at industry conferences and end-user events.