

NOVEMBER 1, 2019

Compass Guide to WCM, Q4 2019

Evaluation of SDL Tridion Sites

By: Tony White



TABLE OF CONTENTS

Ars Logica Position	3
Notes & Resources	3
Vendor Overview	4
Vendor History & Key Recent Developments	5
Profile of the Ideal Customer	6
Key Product Strengths	7
Key Product Limitations	8
Vendor / Product Report Cards	9
Report Card Evaluation Criteria - Business Users	11
Report Card Evaluation Criteria - Technologists	12
About Ars Logica	13



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ARS LOGICA POSITION

SDL Tridion Sites remains one of the WCM market's top three platforms, leading the industry in both tech stack leverage and scalability (co-ranked first in each category). The platform offers excellent content marketing tools (ranked third among all platforms evaluated) and uniquely flexible use of content, layout, code, and profile data as separate components. SDL's globalization/localization capabilities prove second-to-none, and the integration of Sites into SDL's DX suite of products will appeal to marketers at large/global enterprises seeking to deliver localized, omni-channel digital experiences.

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 SDL Tridion 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.

SDL Vendor Overview

SDL has been a market leader in web content management (WCM) since circa 2006 in the U.S. (pre-2007 dates refer to the company Tridion, which was acquired by SDL), several years earlier in Europe, and since roughly 2009 in Asia-Pacific. The vendor produces an extremely scalable best-of-breed platform that incorporates one of the broadest sets of feature-functionality available on the market. The Tridion Sites product is particularly well-suited to global enterprise deployments with rigorous brand management and digital marketing requirements. The vendor's DX products above and beyond Tridion Sites also make it a strong contender in the digital experience platform market.

Company Profile

Year Founded: 1992
Headquarters: Maidenhead, UK; North American headquarters in Wakefield, MA
Employees (or FTE equivalents): 4,100
Geographies: Global
Revenue: \$417 million (£323 million)
Product Types Offered: Digital experience (DX) platform, WCM, translation management, technical content management
Commercial or Open Source: Commercial
Strategic Implementation Partners: Accenture, Amaze, Capgemini, Cognizant, Deloitte, Digital, DEPT, EPAM, Isobar, SapientRazorfish, TCS, Tahzoo
Top Competitors: Acquia, Adobe, OpenText, Sitecore
Key Vertical Industries: Aerospace, automotive, consumer packaged goods, financial services, government, high tech, life sciences, manufacturing, public sector, retail, travel and tourism

Product Profile

Product Name: SDL Tridion Sites
Version: 9.1
Next version release date: Q3 2020
Market segment: Enterprise
Average Sales Price (License Only): \$200,000
Technology Platform: Primarily Java and .NET
Key Strengths: Extreme scalability; superb enterprise tech stack leverage; excellent content marketing tools; flexible use of content, layout, code, and profile data as separate components
Key Limitations: Implementation complexity, heterogeneity of the code base
Highest-Value Use Case: Global deployment of web and digital experience management initiatives with robust translation/localization requirements

Vendor History & Product Evolution

Founded in Amsterdam in 1999, Tridion launched its R3 product after several years of developing the application for clients on professional services engagements. Although the company was regional for the first couple years, the product's success was immediate, gaining traction within the Netherlands and surrounding countries rapidly. Having already acquired customers such as ABN-AMRO, ING, and Philips, Tridion launched its U.S. presence in 2006. Tridion rapidly became a market leader in the U.S., obtaining very high or top ratings from several analyst and consulting firms within the first year. This leadership position has continued *almost* unabated to the present (2013 - 2015 witnessed a slip in focus on core competencies). From May 2007 (when SDL acquired Tridion) until mid-2010, SDL and Tridion operated fairly autonomously, but from mid-2010 until mid-2012, the combined company experienced significant difficulty integrating the two cultures and lines of products. These worries have long since been overcome.

On the whole, SDL has done an excellent job of leveraging top talent in the Web division (now "Tridion" once more) for the development of other product lines, and though SDL's range of products are built with a wide variety of languages and standards – making them sometimes unwieldy for customers to customize – the company has done a commendable job of presenting a unified user experience to non-technical marketers. Evidence of this could easily be seen in the 8.x UI refinements. The 9.x versions shift the focus to SDL's customers' customers. By integrating Tridion Sites into the overall DX product suite, the question SDL has tried to answer is, "How can we best equip non-technical marketers to create effective digital experiences for *their* customers?" Part of the answer rests in SDL's Digital Experience Accelerator (DXA), which provides a best-practice baseline for alleviating *some* of the complexities of doing so.

Key Recent Developments

To recap the Q4 2017 and Q4 2018 *Compass Guides to WCM* on Tridion, major improvements in Sites 8.x included: (1) availability of cloud and on-premise/cloud hybrids with on-premise functional parity, (2) microservices-based system architecture, (3) Adaptive BluePrinting, which allows for content promotion/demotion across global content hierarchies, (4) Instant Site, a templating enhancement for quickly spinning up web properties (campaign sites or country sites, e.g.), and (5) mixed-mode upgrades, which allow customers to combine older versions of the platform with the latest releases. Sites 9.0 introduced: (1) Elasticsearch for improved personalization and experience optimization, (2) Docker containers for quicker site deployment and better scalability, (3) SAML 2.0 to support single sign-on for traffic initiated by identity management services, (4) improved "blended" experiences through integrated Sites-Docs content retrieval, and (5) GraphQL API for "headless" creation of user experiences across channels.

Sites 9.1 introduces: (1) Data Integration Framework, a best-practice methodology for building custom adapters, (2) personalization and lead capturing based on CRM data, and (3) page-based access to back-end e-commerce data for creating and managing online shopping experiences.

Profiling the Ideal Buyer

The ideal buyer of SDL Tridion Sites is the large organization with enterprise-wide WCM requirements, heavy dependence on the multi-channel value of their digital brands, and a global presence requiring high platform scalability and robust translation/localization capabilities. This is not to say that smaller companies cannot also use the product to good effect, but the customer reaping the highest value from the product will be the multinational corporation facing the challenge of managing and marketing their online brands across geographies, languages, and channels.

- **Enterprise-Scale Deployment**

SDL Tridion Sites should be considered primarily by customers with enterprise-wide WCM implementation plans. The product is sufficiently scalable to perform in the most demanding technical environments, and may not be a good value for small-to-midsize companies who will never fully leverage the product's capabilities.

- **Global Digital Presence**

A particular forte of SDL Tridion Sites, global information management is a requirement namely for companies with high volumes of content that span multiple geographies, languages, brands, and online channels.

- **Requirements beyond Tridion Sites**

While Tridion Sites may represent good value as a stand-alone, best-of-breed WCM platform in certain cases, the ideal customer would leverage many of SDL's other offerings, including its translation software (Language Cloud, Machine Translation, Translation Management, Trados Studio, and Trados GroupShare); Tridion Docs (the other main component of Tridion DX); and pre-built connectors to e-commerce, collaboration, DAM, and CRM platforms.

SDL Tridion Sites Will Not Be a Good Fit, If...

If your plans within the next two years do not include the deployment or overhaul of a multi-site, multi-geography, multi-lingual, brand-focused, public-facing Web/digital presence, you may find more value in less costly WCM solutions than Tridion Sites. Ars Logica frequently sees companies overbuy when they have only vague ideas of needing a more scalable, sophisticated product in the longer term. That said, we also see companies underbuy, usually due both to price sensitivity and ignorance of what the combination of best-of-breed WCM, e-commerce, brand management, and translation management could do for their bottom line.

Key Product Strengths

SDL Tridion Sites excels in a number of evaluative categories in our scorecards for both business users and technologists. First, the platform boasts superb enterprise tech stack leverage (co-ranked first of all platforms evaluated), due partly to SDL’s longstanding installed base of customers representing the largest of global web presences. Its enterprise application integration (BI, BPM, CRM, ERP, et al.) capabilities rate very highly. Similarly, the platform boasts extreme scalability (also co-ranked first of all platforms evaluated), again a by-product of its historical presence in the most complex of WCM implementations.

Next, although Sites 8.x contained excellent content marketing tools (ranked third among all platforms evaluated in 2017), the 9.x versions integrate the product into the overall DX suite. This will render the product’s longstanding support for the use of content, layout, code, and profile data as discrete components particularly useful for global digital initiatives that must orchestrate web, and other (structured and unstructured) content, into customer experiences.

Finally, SDL remains the undisputed WCM market leader in globalization/localization technologies, and its expertise in these areas spills into all of its products, regardless of functional classification.

FIGURE 1 SDL Tridion Sites, Key Product Strengths and Limitations

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

KEY STRENGTHS

KEY LIMITATIONS

Superb enterprise tech stack leverage (co-ranked first of all platforms evaluated)	Complexity of implementation and ongoing administration
Extreme scalability (ranked first of all platforms evaluated)	Heterogeneity of the code base
Excellent content marketing tools (ranked third of all platforms evaluated)	Price usually justifiable only with usage of other SDL DX products
Separate, flexible use of content, layout, code, and profile components	
Globalization/localization capabilities (requires Translation Management)	

Source: Ars Logica, Inc.

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

Key Product Limitations

As with any product under continuous development for more than 15 years, the code base of Tridion Sites is heterogeneous. That is, the product has evolved over the years in ways not originally envisioned, and the system architecture has become mildly cumbersome. SDL has done a good job, however, at re-architecting large portions of the platform, which now has a systemic microservices-based delivery architecture. SDL has removed “all legacy technology” from the product. Ars Logica believes that the spirit of the claim is true, but cannot yet confirm the totality inherent in “all.” Complexity always becomes evident during implementations and upgrades, and this holds true for SDL. We should add to the last paragraph that most of the truly enterprise-oriented vendors (the very upper tier of stand-alone WCM vendors, along with the infrastructure/middleware vendors) have either such a wide range of products or such highly-scalable stand-alone products that their code bases have usually come from myriad sources – they are complex both in range of functionality and technical underpinnings. A parallel phenomenon results in the “best” of enterprise WCM products having lines with strongly negative slopes from the scalability and flexibility scores to the ease of administration score in Figure 3. Once up and running, however, Tridion Sites performs nicely, and the non-technical business user need never know what’s “under the hood.” Worthy of note are the staged and rolling upgrade options. In the former, customers upgrade the Content Manager first, followed by upgrades of Content Delivery Components – one machine at a time. In the latter, customers upgrade the database first, followed by upgrades of discrete product clusters – one node at a time.

Next, the price of the product – while fully justifiable for organizations with global information management requirements above and beyond strict WCM – will put it out of reach of many medium-sized companies who would still benefit from synergies between Tridion Sites and SDL’s other offerings. To illustrate this point, Ars Logica has been involved in a number of consulting engagements with midsize companies whose initial price sensitivities have proven myopic over the ensuing 3 - 4 years – shutting them out of competitive digital experience management opportunities that require more wide-ranging functionality than that provided by the mid-tier WCM platforms they selected.

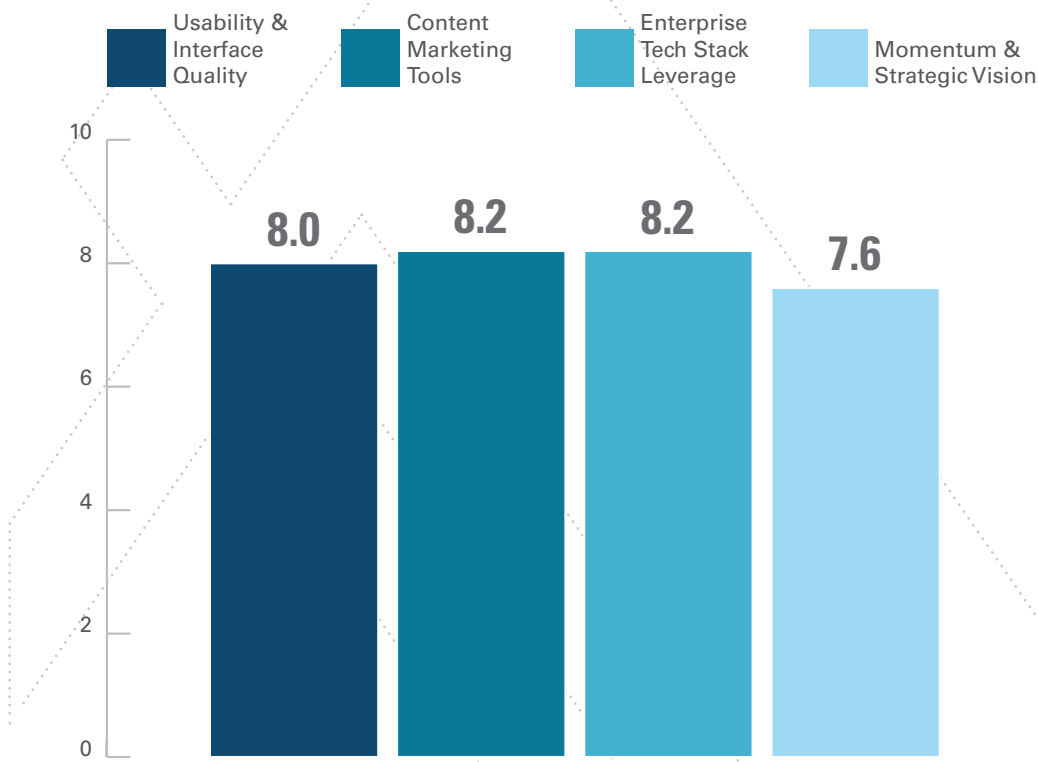
Ars Logica has been quoted in the media regarding what one article’s title describes as “SDL’s failed customer experience message.” We stated, “it’s a shame the marketing hasn’t been better.” We were also very clear that the platform remained “very good technically – fully competitive with Adobe, Sitecore, and other leaders in the experience management field.” Simply put, SDL lost focus on some of its core competencies in 2013 – 2015 by stretching its marketing message – not the platform’s capabilities – too thin. Since WCM has always been a core competency of SDL (Tridion prior to 2007), the operative advice for this report’s purposes is that pre-2016 negative market momentum, overly-broad marketing strategy, and sub-par sales execution now be forgotten by prospective customers. They are no longer relevant.

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 SDL Tridion Sites Report Card for the Business User

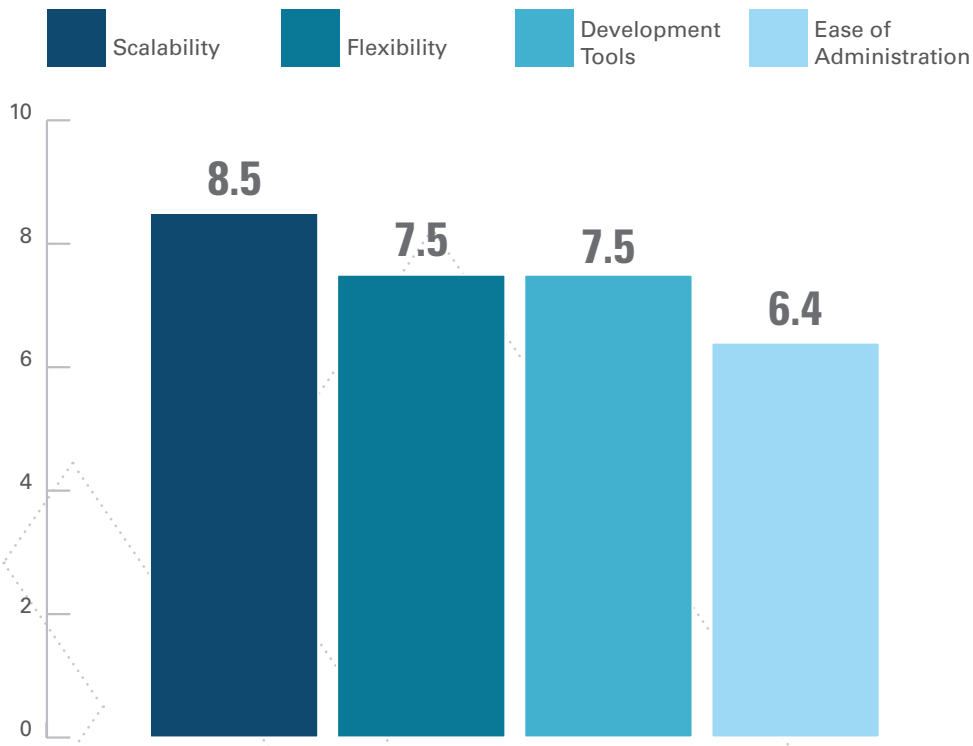
Figure 2 shows Ars Logica's rating of SDL Tridion Sites in four WCM categories of critical importance to business users. Refer to Page 11 for an explanation of the evaluation criteria.



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

FIGURE 3 SDL Tridion Sites Report Card for Technologists

Figure 3 shows Ars Logica's rating of SDL Tridion Sites 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 need 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.



SERVICES

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.

Contact

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