

# Yphise portfolio of valuable projects

Independent investment recommendations since 1985

Business Case Assessment

Assessment Report

## SELECTED BUSINESS CASE

# WEO - WEB EXPERIENCE OPTIMIZATION

For optimizing the satisfaction of customers, prospective clients and partners with timely and targeted content

## Yphise assessment of FatWire Content Server Suite

**BSC** Business  
Strategy and Control

**BIS** Business  
Information Systems

**ISC** IT  
Strategy and Control

**IPS** IT Project and  
Service Management

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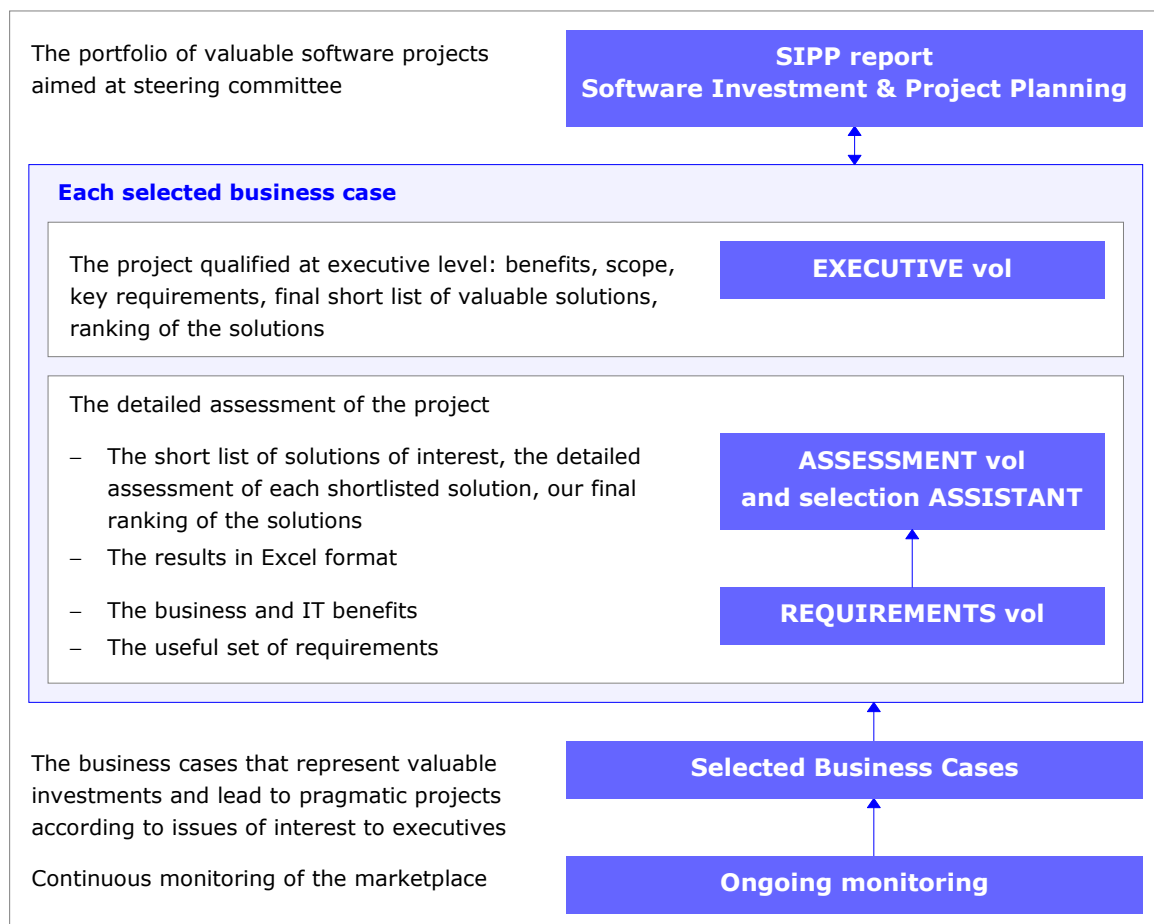
**Yphise** ISO 9001:2000-certified independent quotations  
of software solutions

## Yphise ISO 9001:2000-certified ongoing research program since 1985

Yphise independent research continuously monitors the strategies and solutions of all successful software vendors in order to select valuable and high-priority projects for improving the business performance. Each year, Yphise research draws up the portfolio of valuable projects that the executives should consider when making investment decisions. Yphise transforms high-level strategies or complicated problems in concrete projects with accurate benefits and valuable software solutions.

Yphise puts forth investment recommendations on software solutions, proprietary or open source, based on accurate assessment according to valuable business cases. Yphise judgment relies on a detailed assessment of each solution. Yphise has unique experience in identifying the useful functional and technical requirements in order to score solutions according to benefits expected by large companies.

The Yphise ongoing research program has helped executives plan, prioritize, conduct and control the useful software projects in order to increase business performance since 1985. Our independence since 1985 proves our unparalleled expertise in helping the executives stand back from operational pressure and arrive at sound decisions focused on the issues of large companies. ISO 9001:2000-certification of our research program is evidence of this expertise. This unique distinction states independence and robust methodology for assessing products according to issues and priorities of large companies.



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# 1. ABSTRACT

We are pleased to provide you with our opinion on the Web Experience Optimization (WEO) business case.

Our research demonstrates that the WEO business case represents a priority investment. Executives can invest in all confidence because this business case leads to concrete projects with strong benefits, accurate scope and valuable software solutions.

FatWire Content Server Suite Suite is a certified solution by Yphise. It received the "Yphise AWARD" certificate (valid until March 31, 2010). The "Yphise AWARD" certifies that FatWire Content Server Suite Suite is the best-ranked solution in comparison with the competition. It demonstrates that the solution has the strengths required by large companies and represents a sound investment.

We put forth this investment recommendation based on our independent ongoing research. We remind you that, since 1985, this independent research has been continuously monitoring the strategies and solutions of all successful software vendors in order to select high-priority projects for improving the business performance. This research is ISO 9001:2000-certified (since 1999). This unique distinction is evidence of independence and robust methodology for assessing software solutions according to issues and priorities of large companies.

We are sure that you will be excited by this investment opportunity and by launching the corresponding project.

Yphise research team  
March 2009

## 2. BUSINESS CASE

- 2.1 Key business issues
- 2.2 Benefits for the business
- 2.3 Yphise final short list and ranking
- 2.4 Requirements summary

### 2.1 Key business issues

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Corporate Web sites are key channels for all business activities, whatever the business area.

Marketing, sales and communication business executives need to optimize the Web experience of their customers, prospective clients and partners. This is key in order to increase business activity, generate sales or improve the company image. Business lines want actual return on investment and high conversion of rates of visits into business objectives. Web experience optimization requires delivering appropriate and timely content targeted to each visitor, at the right time and in the right layout.

Business lines need to reduce the Web management loop duration. They want quicker adaptation of their Web communication channel according to the result of previous marketing, sales and communication campaigns. This requires quickly changing the content, layout and targeting. This requires selecting accurately and efficiently the content for each visitor in order to increase satisfaction. This requires analyzing the result of the delivery decisions for improvement.

This business case is selected in the Yphise portfolio of project opportunities for the second time. The first time was in early 2007. The scope of our report has changed. The previous report focused on Web content definition and publishing. We are increasing our commitment to Web experience optimization via targeting functions. Companies are currently facing difficult challenges in attracting and retain visitors and in converting them into customers.

### 2.2 Benefits for the business

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Our research demonstrates that the WEO business case is essential in order to optimize marketing, sales and communication efficiency.

WEO solutions are a key factor in leveraging the investment on the Web. They are a key investment for any company whose business includes the Web as a communication channel. WEO solutions are a cornerstone for any business involving the reliable delivery of up-to-date information (e.g. news, investment, online sales) or requiring tuning content to a variety of prospective clients and issues (e.g. online sales, retail banking, government).

### ➤ **Increasing the business agility on the Web**

Business lines want to optimize the visitor experience on the Web. The Web sites must be closely aligned with the marketplace and most recent business opportunities. Business lines cannot bear delay between, on one hand, business decisions or product availability and, on the other hand, information published to the appropriate Web sites and the layout and presentation of this information. This requires high agility in creating, changing, updating or removing the content. Such agility requires that business lines change easily the content and its layout according to new market offers, business campaigns and events or strategic decisions.

WEO puts the Web content creation, change and publishing into the hands of business users. It manages the content changes in order to ensure integrity and reliability despite agility, i.e. avoiding any misuse that improved agility may facilitate.

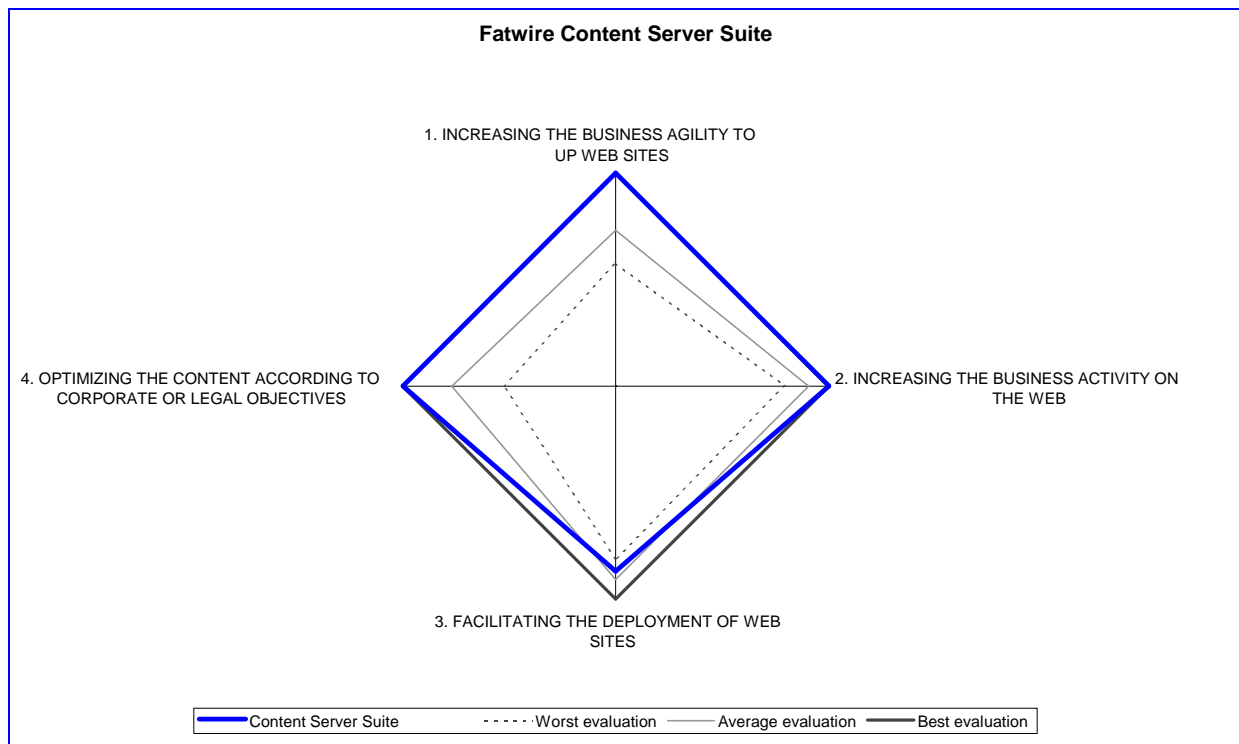
### ➤ **Increasing the business activity on the Web**

Business lines want to increase their activity on the Web. They need to deliver appropriate and timely content to each visitor. They want to target efficiently each visitor with timely offers in order to generate more business. This requires delivering the most suitable content, in the most efficient layout, at the appropriate time to each visitor, even to first-time visitors.

This requires targeting the content and the layout according to all the information available on visitors. WEO manages the various visitor profiles and adapts the content to individual visitors once these are clearly identified (i.e. explicit targeting). It also analyzes visitor behavior and selects the best contents according to the forecast needs of visitors (i.e. implicit targeting).

## **2.3 The best-ranked solution**

FatWire Content Server Suite is a certified solution by Yphise. It received the "Yphise AWARD" certificate (valid until March 31, 2010). The "Yphise AWARD" certifies that FatWire Content Server Suite is the best-ranked solution in comparison with the competition. It demonstrates that the solution has the strengths required by large companies and represents a sound investment.



The solution demonstrates all the required functions in order to easily build, manage and deploy content targeted to visitors. We appreciate its flexibility and ease of use. Content Server Suite manages asset types (i.e. content types) and methods (i.e. handling of content, including specific display). The components tied to methods can be easily defined and located in a Web site layout. The dynamic inheritance facilitates multi-language Web site management. Content Server Suite includes all the required functions in order to adapt contents to targeted users via advanced profiling capabilities. Complementary modules are available to enrich the solution with social networking capabilities (Team-Up) and analytics (Analytics module).

## **2.4 Scope and requirements summary**

The four assessment dimensions define the intended scope for WEO projects and the useful requirements in order to attain the expected benefits of this business case. They aggregate more than 170 functional or technical control items. This list of requirements is practical, in order to evaluate the capacity of the solutions to provide an adequate return on investment. It is also proactive in order to appreciate the upcoming perspectives.

### **1. Increasing the business agility to set up Web sites**

This dimension assesses how WEO solutions facilitate Web sites design and implementation by business users. WEO solutions will significantly reduce the need for technical skills at this stage. Advanced users can create easily new content type, and contributors can publish their own content. WEO solutions facilitate multi-site and multi-language management, e.g. through inheritance and reuse. They accelerate the page design via drag and drop functions in order to position the components on Web pages.

## **2. Increasing the business activity on the Web**

This dimension assesses how WEO solutions provide targeted content to visitors. WEO solutions help segmentation and select the delivered content according to explicit or implicit information. They also include social networking features in order to improve interaction with visitors.

## **3. Facilitating the deployment of Web sites**

This dimension assesses how WEO solutions facilitate deployment of new Web sites. They provide predefined integration connectors. They include testing functions. They accelerate multichannel publishing and ensure high performance. They control the workflow of content publishing.

## **4. Optimizing the content according to corporate or legal objectives**

This dimension assesses how WEO solutions help analyze the audience of Web sites for optimization. They embed analytics, or they interface with third-party analytical solutions. They provide all the information on how the sites run. This information is required in order to improve Web sites. WEO solutions ensure compliance with legal requirements. They version changes and deliver audits of the content and Web site configuration.

*The REQUIREMENTS volume provides the detailed requirements.*

## 3. IT PROJECT

- 3.1 Scope
- 3.2 Positioning of the market segment
- 3.3 Yphise final short list
- 3.4 Benefits for the IT processes

### 3.1 Scope

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Web experience optimization (WEO) solutions manage the design, creation, targeting and delivery of business information to customers, prospective clients or partners through Web channels.

They are designed to be used mainly directly by business users, without any need of technical skill or involvement of the IT teams within the content communication loop. They ensure high agility and responsiveness for the delivery of timely content. They control the staging of Web sites and content so that they comply with corporate policies, e.g. corporate consistency of information, graphical requirements, publication synchronization. They help manage consistently multiple sites for various business needs, with their own requirements of layout, language, localization and service level.

WEO solutions support the design of Web sites and the creation of any type of rich content to populate the Web site. They select the content to be displayed in visited pages, according to business rules, to the context and to the identity and behavior of each visitor. They ensure that valuable content is delivered to each visitor.

WEO solutions help business stakeholders analyze the results obtained with the selected content and targeting rules, for continual improvement.

### 3.2 Positioning of the market segment

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The evaluated market segment is a specific one, with a precise positioning and list of solutions. To avoid confusion, we differentiate it from the following list of market segments. A solution belonging to one of these market segments is inappropriate for attaining the expected benefits.

#### ➤ **Web content management (WCM) solutions**

WCM solutions focus only on the creation and publishing of content. They are suitable for untargeted communication on the Web or departmental Web sites.

WCM solutions do not include targeting functions. WEO solutions include and supplement WCM features.

E.g. Workplace Web Content Management (IBM), Joomla (community open source), OpenCMS (enterprise open source, Alkacon), Typo3 (community open source).

### ➤ **Document management systems (DMSs)**

DMSs store and track all the operational electronic documents of the company. They manage and control operational access to these documents. They ensure the integrity, consistency and reliability of all these documents.

DMSs are designed for internal management of documents. They do not manage the publishing to customers, prospective clients and partners. They can be a valuable source of content for WEO solutions or other publishing systems. Interface between DMS and WEO solutions may be useful. DMSs may include some WCM extension, but they are not designed for effective WEO. WEO solutions and DMSs are distinct and complementary.

E.g. EMC Documentum (EMC), IBM FileNet P8 (IBM), Livelink ECM (Open Text) et Vignette Records & Documents (Vignette).

### ➤ **Portals**

Portal display the content to the Web. They are end-user presentation interfaces. They use portlets to provide a dynamic content display, e.g. to personalize according to end-user preferences.

WEO solutions may populate portals with content. They do not manage or create portlets. Portals may include basic WCM features. They do not manage all the back-office content lifecycle. WEO solutions and portals are complementary solutions.

E.g. Vignette Application Portal (Vignette), WebLogic Portal (BEA) and WebSphere Portal (IBM).

### ➤ **Social networking (SN) solutions**

SN solutions provide various tools to improve, leverage and enhance the exchange and sharing of information, e.g. communities, blogs, directories, wikis. These solutions are also called Web 2.0 solutions or enterprise social software. The most well-known social networking applications include YouTube, Facebook and Wikipedia.

SN solutions do not focus on defining and managing the Web sites. However, their features can be used to optimize traffic on a Web site or develop collaboration within companies. WEO solutions may be usefully associated with SN solutions. Some WEO solutions already embed SN features.

E.g. Elgg, MediaWiki, OpenSocial (Google).

### ➤ **Search engines (SEs)**

SEs search information in various contents via keywords and advanced filters. The search can be done from a Web site or on business content managed within a company, e.g. from an intranet.

Search solutions do not manage Web content creation and publishing. Nevertheless, WEO solutions can be usefully associated with search engines. Search can be positioned directly into the Web sites for visitors or within the WEO back-office for contributors. Most WEO solutions have developed partnership with SE providers.

E.g. IDOL Server (Autonomy), Lucene, Google.

### ➤ **Analytical customer relationship management (ACRM) solutions**

ACRM solutions manage customers in order to understand how to communicate better with them. They manage contacts with customers and marketing campaigns. They analyze customer segments according to contacts and behaviors.

ACRM solutions do not manage Web content. They help define segments that can be used in WEO solutions for targeting. WEO solutions can use these segments to define targeted Web content. ACRM and WEO solutions are complementary.

E.g. Siebel Marketing Analytics (Oracle), Salesforce (Salesforce), SAP CRM (SAP), SAS Customer Intelligence (SAS).

### ➤ **Web analytics (WA) solutions**

WA solutions provide information on Web site audience and help analyze it. They manage metrics in order to identify various parameters (e.g. visitor origin, visitor number, duration, pages visited).

Analytic solutions are not intended to define and manage Web content. Nevertheless, WA solutions are useful for optimization of Web content. Content and Web page organization can be optimized according to site audience. It is essential to associate WEO solutions with WA solutions. Most WEO solutions embed analytics, or vendors have a partnership with WA solution providers.

E.g. Google Analytics (Google), WebTrends Analytics (WebTrends), Omniture Discover (Omniture).

## **3.3 Yphise final short list**

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Our short list includes solutions focused on providing targeted and attractive content to visitors in order to satisfy them, retain them and generate business.

Web content management solutions used to focus on the creation and publishing stages within the cycle of business relationship with visitors. Key business issues require a new generation of solutions. Content creation and management remain a key requirement for

the business, with more demanding agility and autonomy for the business. However, content creation and management must be supplemented with content explicit and implicit targeting and analysis for continual improvement. This is essential in order to obtain the expected benefits.

The ISO 9001:2000 certification of our process is evidence of independence and robust methodology for assessing software solutions according to issues and priorities of large companies. All shortlisted vendors demonstrate their commitment to responding to the requirements of this process. This process challenges them, as in a customer situation. It is evidence of the vendors' commitment to responding to a demanding independent assessment.

Our final short list is as follows (alphabetical order): Fatwire, Interwoven, SDL Tridion, Vignette.

FatWire Software is a pure player in Web experience management (WEM). WEM enables organizations to deliver a rich online experience to users and simplify management of their Web presence. FatWire offers a comprehensive WEM portfolio, including WCM and targeted marketing technologies, collaboration and content integration capabilities.

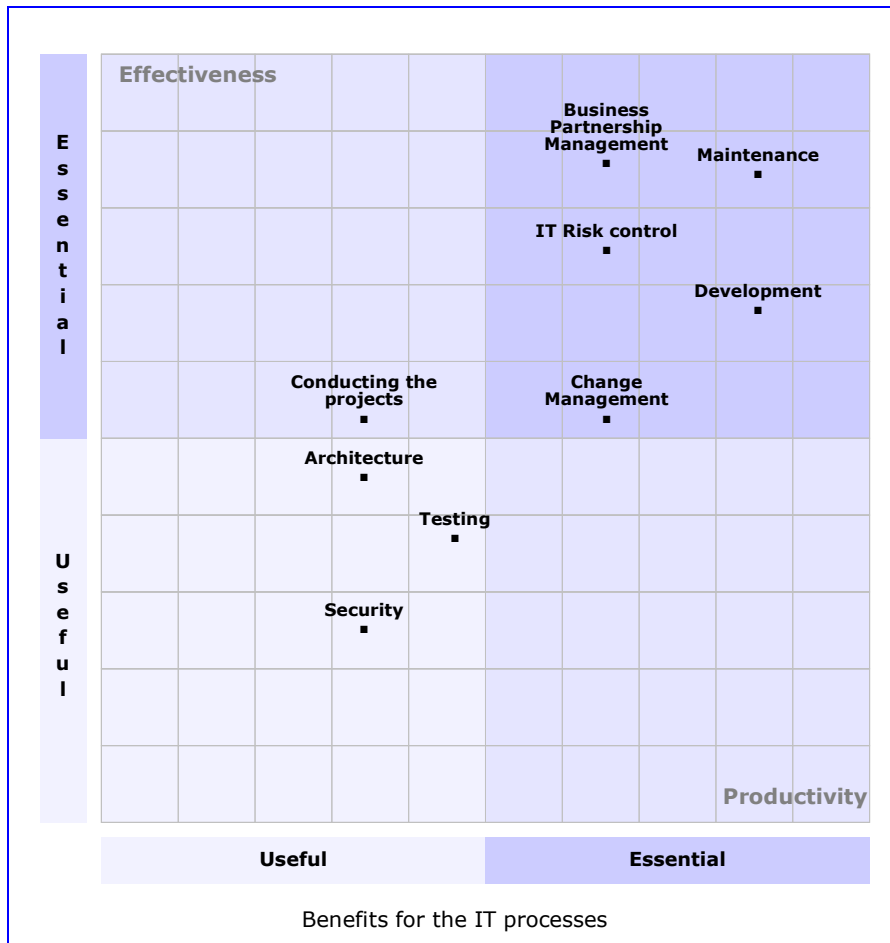
The FatWire Content Server Suite, version 7.5, includes three modules: Content Server (i.e. foundation platform), Analytics (i.e. audience analytic) and Engage (online campaigns management). The vendor also provides TeamUp, which provides collaboration and community management features. This product comes from the acquisition of Infostore. Version 7.5 of Content Server Suite was released in December 2008.

### **3.4 Benefits for the IT processes**

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IT teams need to focus on complex, structuring projects and operations. They are usually not organized to be highly responsive to minor changes such as new content publication or change in Web site templates. However, they must get involved in the implementation of the Web site management infrastructure, in the overall Web site template manufacturing, in interfacing the Web sites with other applications and in developing business-specific features. They delegate all the business operations tied to daily content management and targeting.

Our research highlights the fact that WEO solutions are a key investment for any IT department in any business area with demanding business-to-customer marketing, communication and online sales objectives.



➤ **Business partnership management**

The business partnership management process must guarantee the collection, understanding and processing of business needs. Collaboration of business units with the IT department often fails due to a lack of common wording and reference.

WEO solutions are the required foundation to quickly respond to business requests with regard to communication on the Web. They facilitate content definition and update by business users. Some elements are defined by the IT, e.g. style sheet design, methods to handle each content type, forms. They can also be easily used by business users in a business-oriented interface for Web page and site design. Some advanced business users can also directly define forms or some advanced parts of the sites.

➤ **Maintenance**

The maintenance process conducts scope-limited changes. These changes must bring added value to the business, quickly and at low cost. A key challenge of maintenance is the guarantee of non-regression of existing systems when budgets and time frames are tight.

WEO solutions are essential in order to avoid many maintenance operations on the Web sites. They facilitate content and template change by business users without

involving the IT teams. Moreover, WEO solutions facilitate in-depth maintenance that still requires IT skills, thanks to strict separation of content (e.g. articles) from presentation (i.e. Web page templates) and layout (e.g. presentation of each content object and style sheet). WEO solutions drastically reduce the maintenance workload tied to changes to Web sites.

#### ➤ **Development**

A key development challenge is productivity, i.e. releasing the correct applications on time and within budget. The development process must be optimized. Accurate processes improve the quality and responsiveness of software development.

WEO solutions are essential in order to build and update Web sites quickly, with the fewest possible technical skills. They allow business users to make changes themselves without IT interventions. They provide ready-to-use features to be embedded into Web sites without any development, e.g. search, Web 2.0 collaboration features, forms. This accelerates Web site implementation. Finally, WEO solutions facilitate reuse of Web site components between various sites. This reduces the development workload.

#### ➤ **IT risk control**

IT governance requires management of the risks that information systems represent for the company. Companies must guarantee compliance with internal policies and regulatory requirements. They must manage the operational risks tied to their information systems. They must also manage the useful internal controls in order to guarantee the compliance of operations with internal policies or regulatory requirements.

WEO solutions are the required foundation to mitigate the risks tied to public communication on the Web. Delivery of outdated information or information under nondisclosure protection is a major risk for any company. The volume and content and business rule complexity make it difficult to mitigate this risk. WEO solutions manage these policies and enforce the delivery of up-to-date authorized information.

Dynamic and targeted publishing to the Web also makes it difficult to comply with regulatory and legal requirements for traceability. Business lines must be able to demonstrate evidence of which information has been publicly delivered and when.

#### ➤ **Change management**

The change management process analyzes, plans, implements and checks the changes to the information system. These changes are issued by projects, maintenance, or product and infrastructure management. A key challenge of change management is how to ensure reliability of the information system upon numerous changes. Another key challenge is how to ensure change effectiveness and responsiveness.

WEO solutions are essential in order to reduce the changes tied to Web sites. Changing the content displayed on Web sites is no longer a change; it becomes regular

operation of WEO solutions. Updating the content becomes as easy as updating the data in regular business transactional applications. This makes it possible to focus the change management on actual changes that warrant impact analysis. Moreover, WEO solutions control all the changes internal to the solution. They manage the versions of content and configuration and support rollback.

### ➤ **Conducting the projects**

The mission of the project manager is to conduct projects according to the target value and the expected cost and duration. This requires effective collaboration among the various stakeholders involved.

WEO solutions are a key factor in optimizing the collaboration between different stakeholders on a Web project. Web site projects require a significant number of contributors, e.g. developers, designers, content creators, translators. WEO solutions help manage the task workflow and notifications for efficient collaboration of these stakeholders. They improve the conduct of projects on time.

### ➤ **Architecture**

The architecture process guarantees that the information system is in line with requirements of the business lines in terms of operations or strategies. It manages the flexibility of the operational or decisional systems in order to sustain this alignment over time.

WEO solutions are a key factor in IT flexibility. They provide a single platform to manage all the various Web sites required by the business lines. This is more flexible than silo systems, in order to manage each site. This ensures flexible exchange, reuse, update and integration into other elements of the information system.

### ➤ **Test**

The test process for each project must guarantee both the functional and technical adequacy of the result when budgets and time frames are tight.

WEO solutions are a key factor in order to manage tests of Web sites. They help preview Web pages before publishing. They manage the Web site staging. They mitigate the testing complexity due to dynamic publishing and targeted publishing.

### ➤ **Security**

The security process guarantees the meeting of confidentiality objectives and the providing of robustness against fraud.

WEO solutions are a key factor in content security. They authenticate contributors to Web sites and track who has published what content and when. They also secure access to Web content.

## 4. APPENDIX: ASSESSMENT OVERVIEW

- 4.1 Increasing the business agility to define Web sites
- 4.2 Increasing the business activity on the Web
- 4.3 Facilitating the deployment of Web sites
- 4.4 Optimizing the content according to corporate or legal objectives

### 4.1 Increasing the business agility to define Web sites

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Content Server Suite demonstrates high coverage of this assessment dimension. The solution facilitates the Web content definition via predefined elements (asset types, methods, attributes) and easy-to-use functions. New content types can be defined by business users, through the use of selection fields. The solution also provides an “attribute editor” to customize the fields and accelerate the design.

We appreciate the management “methods” in order to define various handlings or displays of a single content type. Methods or content selections can be displayed and moved easily to the Web page via drag and drop. Finally, the solution supports advanced inheritance between content items. This helps support multi-language versions of Web sites. It facilitates translation with dedicated screens and comparison between languages.

### 4.2 Increasing the business activity on the Web

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Content Server Suite demonstrates high coverage of this assessment dimension. The solution facilitates segmentation and content recommendation by segment. It includes out-of-the-box predefined profiles with predefined attributes, e.g. buyer. Profiles and attributes of new visitors can be easily defined. Some implicit information is managed in attributes, e.g. total of clickstamps on a page. Recommendations can be defined to select the content to be associated with segments. They are defined through business rules.

The solution includes comprehensive social networking features with Team-up, e.g. tagging, ranking, blogging.

### 4.3 Facilitating the deployment of Web sites

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Content Server Suite demonstrates good coverage of this assessment dimension. The solution provides efficient integration capabilities via various plug-ins, import/export Web services, Java API or through the CIP framework. This framework helps integrate into Sharepoint, file systems or Documentum databases.

The solution also demonstrates good performance capabilities via cluster management and satellite servers for cache management.

#### **4.4 Optimizing the content according to corporate or legal objectives**

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Content Server Suite demonstrates high coverage of this assessment dimension. The solution includes an Analytics module and predefined reports for tracking Web audience. It also supports integration into various dedicated third-party solutions, e.g. Google Analytics, Webtrends, Omniture. Content Server Suite demonstrates efficient versioning and audit functions. It also includes impact analysis capabilities via “referencing assets”.

*The ASSESSMENT volume provides the detailed assessment.*