Web Content Management Marketplace
Trends to Watch in 2022

Tony Byrne
February, 2022
A Different Kind of Analyst Firm...

<table>
<thead>
<tr>
<th>GEEKS</th>
<th>MYSTICS</th>
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<tr>
<td>LOSERS</td>
<td>POSERS</td>
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“the mystical quadrant”

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<tr>
<th>Independence Factors</th>
<th>Real Story Group</th>
<th>Other Firms</th>
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<tbody>
<tr>
<td>Consult to vendors?</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Speak at vendor events?</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Accept expenses &amp; hospitality from vendors?</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Write papers for vendors?</td>
<td>No</td>
<td>Yes</td>
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WCM PAST & FUTURE
Evolution Part 1: Reference Model for the 2000s - Multichannel
Model for the 2010s: Horizontal Integration

**MAJOR CHANNELS**
- Social
- Email
- Website
- Mobile
- Print
- Video

**PRODUCTION, INTERACTION, & DELIVERY SERVICES**
- CDN
  - Speed digital delivery
- OVP
  - Deliver Streaming Video
- Optimization
  - Analyze, test, and improve
- Mobile Middleware
  - Custom mobile experiences
- Community
  - Discussions and profiles
- E-commerce
  - Conduct Transactions
- Consumer Analytics
  - Collect and report on behavior
- Portals
  - Transact business
- Page Layout
  - Develop Print materials and packaging
  - Contact Center
  - Address customer inquiries

**CONTENT & ENGAGEMENT MANAGEMENT**
- Social Engagement
  - Connect and engage in social media
- Marketing Automation
  - Manage email and social campaigns
- WCM
  - Manage web content and customer experience
- DAM / MAM
  - Manage images and video

**Customer Data Backbone**
- BI
- Analytics
- PIM
- MDM
- ERP
- CRM
Forrester and Gartner on DXP: Doubling Down on the 2010s

From a customer perspective this is a crazy-quilt agglomeration of unrelated toolsets.
Silo Problem: **Isolated, Disjointed, Inconsistent Customer Experiences**

- **Ads**
  - Engagement Silo
  - Content
  - Data
  - Rules
  - Planning
  - Analytics

- **Web**
  - Engagement Silo
  - Content
  - Data
  - Rules
  - Planning
  - Analytics

- **Email**
  - Engagement Silo
  - Content
  - Data
  - Rules
  - Planning
  - Analytics

- **Mobile**
  - Engagement Silo
  - Content
  - Data
  - Rules
  - Planning
  - Analytics

- **Social**
  - Engagement Silo
  - Content
  - Data
  - Rules
  - Planning
  - Analytics

- **Print**
  - Engagement Silo
  - Content
  - Data
  - Rules
  - Planning
  - Analytics

- **Alexa**
  - Engagement Silo
  - Content
  - Data
  - Rules
  - Planning
  - Analytics

- **Chat**
  - Engagement Silo
  - Content
  - Data
  - Rules
  - Planning
  - Analytics

- **Call**
  - Engagement Silo
  - Content
  - Data
  - Rules
  - Planning
  - Analytics

- **PoS/F2F**
  - Engagement Silo
  - Content
  - Data
  - Rules
  - Planning
  - Analytics

- **IoT/Product**
  - Engagement Silo
  - Content
  - Data
  - Rules
  - Planning
  - Analytics

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Enterprise Target Reference Model for an Integrated Customer Experience

**FOUNDATION SERVICES**

- **Omnichannel Operations**: Cross-team collaboration and planning
- **Unified Customer Data**: Single source for definitive customer data & segments
- **Journey Orchestration**: Omnichannel personalization and next-best-action rules
- **Omnichannel Content**: Single source of the truth for re-usable assets
- **Customer Intelligence**: Analytics, reporting, and modeling

**CUSTOMER BENEFITS**

- **Consistent messaging**
- **“They know me...”**
- **Coherent interaction**
- **Story consistency**
- **Relevant options**

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# RSG MarTech Services Reference Model: Composable Stack

## ENGAGEMENT CHANNELS
- **Ads**
- **Web**
- **Email**
- **Mobile**
- **Social**
- **Print**
- **Alexa**
- **Chat**
- **Call**
- **PoS/F2F**
- **IoT/Product**

## INTERACTION & DELIVERY ENVIRONMENTS
- **Advertising**
  - Generate demand
- **Sites**
  - Deliver information
- **Applications**
  - Deliver services
- **Distribution**
  - Deliver via channel
- **Storefront**
  - Sell things
- **Contact Center**
  - Answer questions

## ENGAGEMENT SERVICES
- **Customer Care**
  - Manage customer inquiries
- **CRM & SFA**
  - Automate sales & manage relationships
- **Social Media Management**
  - Engage in social media & communities
- **Outbound Marketing**
  - Manage campaigns, deliver messages
- **WCM**
  - Manage web content & inbound experiences
- **Ecommerce**
  - Manage commercial activity

## ENTERPRISE FOUNDATION SERVICES
- **Enterprise Integration**: Data Collection, API Gateways, Eventing, Messaging, etc.

### CONTENT & INFO
- **Omnichannel Content Services**
  - Manage components fueled with data
- **Digital Asset Management**
  - Manage rich media & brand assets
- **Product Information Management**
  - Manage catalog structure, info, pricing

### DATA
- **Customer Data Activation**
  - Manage actionable data & segments
- **Customer Data Operations**
  - Ingest, process, and unify customer data
- **Enterprise Data Intelligence**
  - Analytics, Modeling, Reporting

### DECISIONING
- **Experience Optimization**
  - Omnichannel test & improve
- **Omnichannel Personalization**
  - Customize individual experiences
- **Journey Orchestration**
  - Set decisions for omnichannel engagement
RSG MarTech Services Reference Model: ”DXP”

**ENGAGEMENT CHANNELS**
- Ads
- Web
- Email
- Mobile
- Social
- Print
- Alexa
- Chat
- Call
- PoS/F2F
- IoT/Product

**INTERACTION & DELIVERY ENVIRONMENTS**
- Advertising
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**ENGAGEMENT SERVICES**
- **Customer Care**
  - Manage customer inquiries
- **CRM & SFA**
  - Automate sales & manage relationships
- **Social Media Management**
  - Manage campaigns & social media & communities
- **Outbound Marketing**
  - Manage campaigns & sales activity
- **WCM**
  - Manage web content & inbound experiences
- **Ecommerce**
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**ENTERPRISE FOUNDATION SERVICES**
- **Customer Data Operations**
  - Ingest, process, and unify customer data
- **Digital Asset Management**
  - Manage rich media & brand assets
- **Product Information Management**
  - Manage catalog, info, pricing
- **Content & INFO**
  - Manage content & data with data
- **Data**
  - Ingest, process, store data
- **Decisioning**
  - Omnichannel Personalization
  - Customer Data Activation
  - Experience Optimization

**Engagement Channels**
- Advertising
  - Generate demand
- Sites
  - Deliver information
- Applications
  - Deliver services
- Distribution
  - Deliver via channel
- Storefront
  - Sell things
- Contact Center
  - Answer questions

**Customer Engagement**
- Omnichannel Content Services
  - Manage content fueled with data
- Customer Data Activation
  - Manage actionable data & segments
- Enterprise Data Intelligence
  - Analytics, Modeling, Reporting
Enterprise Digital Content Management: Future Vision

**INTERACTION ENVIRONMENTS**

- Advertising
  - Generate demand
- Contact Center
  - Answer questions
- Applications/Portal
  - Deliver services
- Dealerships
  - F2F Engagement
- Websites
  - Deliver information
- Online Storefronts
  - Sell things

**ENGAGEMENT SERVICES**

- Customer Loyalty
  - Manage rewards logic and redemptions
- Sales & Support
  - Automate sales
  - Manage relationships
- Social Media Mgmt
  - Engage in social media & communities
- Outbound Marketing
  - Manage campaigns
  - Deliver messages
- WCM
  - Manage web content & inbound experiences
- Ecommerce
  - Manage commercial activity

**Omnichannel Content Services**

- Manage components fueled with data
- Re-usable and trackable content / asset / product components

**Omnichannel Content Platform**

- Product Information: Manage unified, core product information

**Translation Management Service**

- Unified translation process

*Longer-form experiential / value-story content & some static page management*
By-product: Get simpler at the engagement tier….

…Invest low and simplify high
AN EVOLVING MARKETPLACE
WCM Marketplace: Complexity Spectrum

**Highly Fragmented**

- Traditional analyst firms (Forrester, Gartner) miss breadth of market
- PaaS still predominates over SaaS
- Significant competition persists around usability and editorial model “fit”
- Competition on architecture too, but: emergence of “head optional” as dominant model
- General market squeeze: pressure on top tier players from below
- This has led to expansion into adjacent spaces among major players
Architectural Considerations: “Headless” and “Hybrid”

Traditional CMS

Cloud-first Headless
WHAT THIS MEANS FOR THE MARKET
Key Take-Aways

1. WCM Marketplace is fragmented, but compressing
2. Cautions around top and bottom of market
3. Top of market is over-stretching horizontally, and over-weighted with technical debt and complexity
4. Remain cautious about “headless-only”
5. Meta-trend around externalization of previously bundled services:
   • Content operations
   • A/B testing and optimization
   • Personalization
   • Analytics
   • DAM and other component assets
6. Vendors promoting “composable” DXPs: Caution here…
7. More roll-ups? Big caution here…
Term of the Day....

“Design-Thinking”
Business-focused
Team-based
Empirical
Iterative
Adaptive
Stay in Touch…

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