

# Magic Quadrant pour les plateformes d'expérience numérique

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Le marché des plateformes d'expérience numérique reflète la demande de plateformes pour gérer les expériences numériques des clients, des partenaires et des employés. Utilisez ce Magic Quadrant pour identifier les fournisseurs qui répondent à vos besoins sur le Web, les appareils mobiles et d'autres canaux numériques.

## Définition/description du marché

Une plateforme d'expérience numérique (DXP) est un ensemble intégré de technologies conçues pour permettre la composition, la gestion, la livraison et l'optimisation d'expériences numériques contextualisées dans des parcours clients multiexpériences.

Un DXP peut fournir des expériences numériques optimales à une variété de composants, y compris les consommateurs, les partenaires, les employés, les citoyens, les étudiants et d'autres publics, et aider à assurer la continuité tout au long du parcours de vie du client. Il fournit l'orchestration de présentation qui relie les capacités de plusieurs applications pour former des expériences numériques transparentes.

Un DXP fait partie d'un écosystème commercial numérique via des intégrations basées sur des API avec des technologies adjacentes. Les DXP sont applicables aux cas d'utilisation business-to-consumer (B2C), business-to-business (B2B) et business-to-employee (B2E).

Les fonctionnalités de base d'un DXP, fournies nativement ou via une intégration, sont les suivantes :

- Gestion de contenu
- Services de compte
- Personnalisation et prise en compte du contexte
- Analyse et optimisation
- Cartographie du parcours client

- Gestion des données clients
- Présentation, livraison et orchestration
- Recherche, navigation et aperçu
- Collaboration et partage des connaissances
- Sécurité et contrôle d'accès
- Intelligence artificielle (IA)
- Fonctionnalités cloud
- Architecture et conception de plate-forme
- Intégration, interopérabilité et extensibilité
- Prise en charge multi-expériences

Il existe également des fonctionnalités optionnelles et des marchés adjacents qui sont hors du champ d'application de DXP, mais qui apparaissent souvent dans des cas d'utilisation. Ceux-ci incluent (mais ne sont pas limités à):

- Plateformes de services de contenu
- Développement d'applications low-code (LCAP)
- Développement multiexpérience (MXDP)
- Commerce numérique
- Gestion des actifs numériques (DAM)
- Plateformes d'automatisation du marketing
- Plateformes de marketing de contenu (CMP)
- Gestion de l'information produit (PIM)
- Service à la clientèle et ventes
- Le CRM
- Gestion de la communication client (CCM)

## Magic Quadrant

**Figure 1 : Magic Quadrant pour les plateformes d'expérience numérique**





Source : Gartner (mars 2023)

## Forces et mises en garde des fournisseurs

### Acquia

Acquia est un leader dans ce Magic Quadrant. Son DXP se compose d'Acquia Drupal Cloud et d'Acquia Marketing Cloud. Acquia est la principale société commerciale derrière le système de gestion de contenu Web (WCM) open source Drupal. Acquia Open DXP offre de vastes capacités de gestion de contenu et d'expérience client, notamment la personnalisation, l'analyse, la gestion du parcours client et une plate-forme de données client. Acquia DXP est disponible en tant qu'offre PaaS (Platform as a Service), avec certains composants (Site Factory pour la gestion multisite, ainsi que DAM, CDP, Personalization, Campaign Studio et Campaign Factory) disponibles en SaaS. Acquia a son siège social à Boston, Massachusetts, États-Unis, avec une présence en Europe, en Amérique latine et dans la région Asie/Pacifique. Sa solution est souvent déployée dans les secteurs verticaux des communications, des médias et des services, de l'éducation, des services financiers, de la fabrication, de la vente au détail et des biens de consommation emballés (CPG). Bien qu'Acquia prenne le plus souvent en charge les cas d'utilisation B2C et B2B, il dispose également d'une solution d'expérience employé ciblant les cas d'utilisation B2E.

## **Forces**

- Site Factory d'Acquia est une fonctionnalité remarquable. Il s'agit d'une offre SaaS permettant aux organisations de coordonner et de mettre à l'échelle facilement le déploiement sur un réseau de sites, y compris la possibilité de cloner des sites modélisés; créer, lancer et maintenir des sites à partir d'une base de code unique; et mettre en œuvre facilement des changements de conception et de marque à l'échelle mondiale.
- Acquia a progressé plus loin que de nombreux autres fournisseurs dans cette recherche pour réaliser une synergie dans ses innovations et acquisitions dans la gestion des données clients, la personnalisation, l'apprentissage automatique et le low code. Des fonctionnalités telles que la gestion des données client et la cartographie des parcours sont améliorées grâce à l'apprentissage automatique et disponibles via une interface utilisateur de concepteur visuel low-code. Le produit comprend des modèles d'apprentissage automatique prédéfinis, mais configurables, prenant en charge le clustering basé sur le comportement, la meilleure expérience, le meilleur canal suivant, le meilleur temps d'envoi suivant et le meilleur produit suivant, entre autres.
- Acquia est l'un des rares fournisseurs DXP de cette étude à positionner activement le support pour les cas d'utilisation de l'intranet et du portail des employés. Acquia prend en charge la gestion d'événements, la gestion des connaissances, les communications des dirigeants, les actualités de l'entreprise, la collaboration, les données et les informations axées sur l'expérience des employés. Cela en fait une option convaincante pour les organisations qui poursuivent une stratégie d'expérience totale.

## **Précautions**

- Les liens open-source d'Acquia continuent de contribuer à la confusion du marché entre Drupal open source et Drupal Cloud commercial dans le cadre du DXP du fournisseur, et où les dépendances résident sur la base de code open source et la sécurité.
- Les progrès d'Acquia vers la composabilité sont lents par rapport aux autres leaders DXP, l'accent étant mis sur l'activation des équipes de fusion dans l'écosystème Acquia plutôt que sur la prise en charge de la composition d'expérience numérique (DXC) entre les fournisseurs.
- Malgré le lancement d'un kit de démarrage headless utilisant Next.js en octobre 2022, les capacités headless d'Acquia restent moins éprouvées sur le marché et ne sont pas aussi conviviales ou aussi productives que celles des autres fournisseurs DXP dans cette étude.

## **Adobe**

Adobe est l'un des leaders de ce Magic Quadrant. Son DXP est Adobe Experience Cloud, qui comprend une pléthore de fonctionnalités telles que la gestion de contenu, l'analyse, la personnalisation, le parcours client et la gestion des données client. Il est disponible à la fois en tant que service géré PaaS et SaaS. Adobe a son siège social à San Jose, en Californie, aux États-Unis, et est présent dans le monde entier. Elle a des clients dans une variété d'industries et de

tailles variées. Le principal cas d'utilisation d'Adobe Experience Cloud est le B2C, mais certaines organisations l'utilisent également à certaines fins B2B, et parfois pour le B2E.

### **Forces**

- La technologie d'Adobe est largement adoptée et le nom de la marque est très reconnaissable dans le monde de la gestion de l'expérience numérique. De nombreux acheteurs le choisissent comme une solution éprouvée et mature.
- Adobe propose un large éventail de fonctionnalités hautement sophistiquées, innovantes et étendues pour les cas d'utilisation externes de marketing numérique et de gestion de l'expérience numérique destinés aux consommateurs, y compris Adobe Experience Cloud for Healthcare, récemment lancé et prêt pour la loi HIPAA.
- Adobe dispose d'un vaste écosystème qui comprend des agences de conception et de création, des intégrateurs de systèmes, des agences de marketing et de publicité et des outils créatifs. Cela offre aux clients de nombreuses options pour déployer et prendre en charge les produits du fournisseur.

### **Précautions**

- Adobe propose un portefeuille de produits à prix élevé. Son coût total de possession (TCO) est généralement assez élevé par rapport aux autres fournisseurs sur le marché DXP.
- Adobe dispose d'une suite très complexe d'outils de gestion de l'expérience numérique nécessitant des ressources techniques considérables, avec une courbe d'apprentissage extrêmement abrupte, des compétences et des formations spécialisées et des délais de mise en œuvre étendus.
- L'innovation d'Adobe a tendance à être en avance sur le marché et en avance sur les utilisateurs finaux et les acheteurs.

### **Bloomreach (en anglais seulement)**

Bloomreach est un visionnaire dans ce Magic Quadrant. Son DXP est Bloomreach Commerce Experience Cloud, une solution modulaire comprenant Content (CMS), Discovery (recherche et merchandising) et Engagement (CDP, personnalisation et analyse). Il est disponible en tant que solution entièrement SaaS. Bloomreach a son siège social à Mountain View, en Californie, aux États-Unis, avec des bureaux en Europe, au Moyen-Orient et en Asie, et elle est également présente dans la région Asie/Pacifique, avec seulement quelques partenaires en Amérique latine. L'objectif principal de Bloomreach a de plus en plus ciblé les expériences de commerce numérique, mais il a élargi sa portée dans ce secteur. Il est déployé pour les cas d'utilisation B2C dans les secteurs verticaux tels que la vente au détail, les voyages et la banque, et pour les cas d'utilisation B2B dans la fabrication et la distribution, avec une très large gamme de tailles de clients.

### **Forces**

- Bloomreach a déplacé l'accent de la largeur monolithique vers l'agilité modulaire. Sa solution est consommable de manière modulaire, avec un CMS headless et un innovant de création de pages / expérience DXC d'intégration frontale découplé JavaScript.
- Bloomreach a connu une forte croissance en 2022. Cela peut être dû en partie à l'acquisition d'un nombre accru de clients verticaux diversifiés au-delà de la vente au détail et de la fabrication, y compris les services financiers et les voyages et l'accueil.
- Bloomreach Engagement représente des capacités de personnalisation et de gestion des données client différenciantes. Il fournit l'intégration des données et une seule couche de données partagées s'agrégeant en un seul endroit en temps réel. Il utilise l'apprentissage automatique pour créer des segments et activer des expériences de personnalisation dans Content and Discovery, ainsi que via les nouvelles API de gestion des terminaux et tout autre canal ou point de contact numérique.

### **Précautions**

- Bloomreach reste principalement axé sur le commerce numérique pour les cas d'utilisation B2C et B2B, comme en témoignent le changement de marque et la mise sur le marché principalement en tant que « plate-forme d'expérience commerciale ». La prudence peut être requise pour une utilisation dans des scénarios non transactionnels.
- Le passage à la fourniture de CMS headless fournit une architecture moderne forte, mais peut s'avérer difficile pour les prospects moins matures sur le plan numérique. Bloomreach fournit un outil d'« orchestration de l'expérience » permettant aux utilisateurs professionnels de prévisualiser et de gérer les pages développées. Cependant, les clients doivent comprendre les API GraphQL, référencer les kits de développement logiciel (SDK) des applications de page d'exploration (SPA) ou utiliser des frameworks externes tels que Vue Storefront ou SAP Spartacus pour créer le front-end.
- Bloomreach Content manque de capacités avancées en matière de contrôle d'accès basé sur les rôles par rapport aux leaders de ce Magic Quadrant, en particulier pour les cas d'utilisation B2B et B2E avancés.

### **CoreMedia**

CoreMedia est un acteur de niche dans ce Magic Quadrant. Son DXP s'appelle CoreMedia Content Cloud, et ses capacités incluent la gestion de contenu, l'intégration et l'interopérabilité. Il est disponible en tant que PaaS géré par le fournisseur ou peut être autogéré, sur site ou dans un cloud public. CoreMedia a son siège social à Hambourg, en Allemagne, et est présent dans d'autres parties de la région EMEA et en Amérique du Nord, tout en étant soutenu par des partenaires de la région Asie/Pacifique. CoreMedia est utilisé dans un large éventail de secteurs verticaux, notamment la vente au détail, les télécommunications, la fabrication, les services financiers, les soins de santé, les médias et le divertissement. Ses clients ont tendance à utiliser son DXP principalement pour les cas d'utilisation B2C, B2B et B2B2C, avec un accent particulier sur le soutien des expériences de commerce numérique.

## **Forces**

- Les atouts de CoreMedia dans le soutien des opérations multisites mondiales fournissent une plate-forme solide pour assurer la cohérence de la marque avec la production multicanal (par exemple, la vente sociale).
- CoreMedia fournit un noyau allégé, mais un large éventail d'intégrations prenant en charge des environnements complexes. Des exemples d'intégrations incluent Algolia, commercetools, Dynamic Yield, Monetate (anciennement Kibo), Salesforce (Salesforce Commerce Cloud, Salesforce Marketing Cloud), SAP (SAP Commerce Cloud) et SiteImprove.
- CoreMedia fournit une prise en charge complète de la globalisation, de l'internationalisation, de la localisation et de la traduction, ainsi que des capacités de mise à l'échelle qui prennent en charge les déploiements de marques mondiaux complexes.

## **Précautions**

- CoreMedia a une stratégie de mise sur le marché étroite, en mettant l'accent sur les cas d'utilisation axés sur le commerce numérique. Les clients potentiels doivent évaluer soigneusement leur stratégie produit, leur feuille de route produit et leur capacité à prendre en charge des cas d'utilisation au-delà du commerce numérique.
- CoreMedia dispose d'une interface utilisateur puissante, mais obsolète, et les clients doivent examiner de près la capacité de ses utilisateurs professionnels à y travailler de manière productive en demandant une démonstration pratique ou une preuve de concept.
- La migration de CoreMedia vers le cloud est inégale et va des fonctionnalités autogérées, gérées par PaaS par les fournisseurs et orientées SaaS. Campaign Hub et Event Hub sont des exemples de nouveaux services cloud natifs. Les clients auto-hébergés ont accès aux images Docker et Kubernetes, mais des dépenses supplémentaires sont nécessaires pour Microsoft Azure, Amazon Web Services ou d'autres clouds, en plus des frais de licence d'abonnement CoreMedia.

## **Pic de la couronne**

Crownpeak est un joueur de niche dans ce Magic Quadrant. Son DXP est la plate-forme d'expérience numérique Crownpeak, et ses capacités comprennent la gestion de contenu, la présentation et l'orchestration, ainsi que des capacités adjacentes pour la gestion des consentements, la conformité, la gouvernance et la sécurité. L'acquisition d'Attrakt pour la recherche et la découverte de produits a été achevée en décembre 2022, mais n'a pas été évaluée dans le cadre de l'évaluation. Il est disponible en tant que SaaS, le CMS FirstSpirit acquis ayant été activé dans le cadre de la solution DXP. Crownpeak a son siège social à Denver, Colorado, États-Unis, et est présent en Europe. Crownpeak est souvent utilisé par les organisations dans les secteurs de la fabrication, des communications et des médias, des services bancaires et des valeurs mobilières, et de la vente au détail. Il est le plus souvent déployé pour les cas d'utilisation B2B et B2C.

## **Forces**

- Crownpeak fournit de solides capacités de personnalisation basées sur l'IA à l'aide de son moteur d'optimisation de l'expérience via un modèle OEM avec rendement dynamique.
- Crownpeak a clarifié et exécuté ses stratégies de produits et de commercialisation à la suite de l'acquisition de DXP d'e-Spirit en 2021, fournissant une orientation indispensable aux clients.
- Crownpeak a des intégrations bien présentées nativement dans son interface utilisateur et dans le front-end en tant que service (FEaaS) basé sur Vue proposé par le fournisseur. Les clients peuvent utiliser ce service pour améliorer la cohérence frontale à mesure qu'ils mûrissent leur adoption de DXC.

### ***Précautions***

- Crownpeak a une présence géographique limitée en dehors de l'Europe et de l'Amérique du Nord. Les clients potentiels doivent examiner de près le réseau de partenaires dans d'autres régions.
- Crownpeak couvre nativement une plus petite partie du paysage technologique DXP que certains des fournisseurs DXP plus larges évalués dans cette recherche. Il est à la traîne par rapport à la concurrence dans des domaines tels que l'IA, la gestion des données client, la cartographie du parcours client et l'analyse.
- L'écosystème de partenaires de Crownpeak est comparativement plus petit sur un marché qui dépend fortement de ces écosystèmes pour les services de conseil stratégique et de mise en œuvre. Les clients potentiels peuvent constater que les ressources pour soutenir la mise en œuvre sont moins abondantes, tout comme les alliances technologiques par rapport à d'autres fournisseurs dans cette recherche.

### **HCLSoftware**

HCLSoftware est un challenger dans ce Magic Quadrant. Son DXP est HCL Digital Experience (DX), qui fait partie d'un portefeuille de produits HCL Customer Experience (CX) plus large. Les fonctionnalités de base incluent la gestion de contenu, DAM, un CDP récemment lancé appelé Signals et le développement d'applications low-code. Les clients HCL DX existants restent principalement sur site, bien que certains déploiements plus récents migrent vers le cloud et que HCL soit passé à un modèle de tarification basé sur la consommation. HCLSoftware a son siège social à Sunnyvale, en Californie, aux États-Unis, et exerce ses activités à l'échelle mondiale. Son DXP est déployé dans les secteurs gouvernementaux, des sciences de la vie, de l'assurance, des services financiers et autres. Il est principalement utilisé dans les grandes et très grandes entreprises pour les cas d'utilisation B2B, B2C et B2E.

### ***Forces***

- Les capacités de sécurité et de gouvernance sont des facteurs de différenciation clés pour cette « plate-forme de confiance » auto-proclamée, ce qui peut en faire un bon choix pour les grandes organisations opérant dans des environnements de sécurité et de conformité stricts.
- Pour ceux qui recherchent une approche de framework pour créer des solutions DXP complexes et personnalisées qui convergent les fonctionnalités de DXP, MXDP et LCAP,



HCLSoftware fournit l'une des rares solutions à fournisseur unique, ainsi qu'un support de services professionnels.

- HCLSoftware a des atouts différenciateurs pour le B2E autour du contrôle d'accès granulaire et de l'utilisation de son produit de collaboration HCL Connections pour alimenter les communautés intranet.

### ***Précautions***

- La complexité et la flexibilité de HCL DX peuvent s'avérer un défi pour ceux qui recherchent une solution DXP plus packagée qui ne nécessite pas de compétences spécialisées et de conseils.
- Des prix élevés et un taux relativement faible d'acquisition nette de nouveaux clients témoignent d'une dépendance à l'égard des ventes incitatives et des ventes croisées au sein de la base installée existante. HCLSoftware est rarement vu sur les listes de clients de Gartner.
- La clientèle du fournisseur provient d'un large éventail de secteurs verticaux - près de la moitié de ses revenus DXP provient des services financiers, du gouvernement et des fournisseurs de soins de santé. Les prospects dans d'autres industries doivent évaluer soigneusement la disponibilité et l'applicabilité à leur secteur vertical.

### **Kentico**

Kentico est un joueur de niche dans ce Magic Quadrant. Il offre deux options DXP. Kentico Xperience 13, lancé en 2020, est disponible en tant que PaaS avec une option de service géré. Le nouveau Xperience by Kentico, lancé en juillet 2022 en tant que successeur de Kentico Xperience 13, est disponible en tant que SaaS autogéré. Les offres de Kentico ciblent les spécialistes du marketing numérique avec un large éventail de capacités, y compris la gestion de contenu, l'automatisation du marketing et le commerce numérique. Kentico a son siège social à Brno, en République tchèque, et a une forte présence en Amérique du Nord. Son DXP est souvent déployé par des organisations dans les secteurs des services financiers, de la santé et de la fabrication. Il est généralement utilisé par les entreprises de taille moyenne dans divers cas d'utilisation B2B, B2C et B2E.

### ***Strengths***

- Kentico's organic approach to innovation offers a favorable contrast to vendors that innovate mostly through acquisition. While it may hamper big leaps in innovation and customer adoption for some new features, the organic approach also results in a more unified, cohesive platform with a common, standardized look and feel across components.
- Kentico appeals to midsize organizations that want to start simple and aspire to move up the maturity and sophistication curve in line with their developing practices and skills.
- The vendor is highly regarded for ease of use and deployment. Low- and no-code capabilities, along with headless and hybrid support in the new Xperience by Kentico offering, promise to reinforce these attributes.

### ***Cautions***

- While Kentico has improved its focus by spinning off its pure headless content management system, Kontent.ai, into a separate company, it's still left with a dual product strategy, with a major rearchitecting and transition exercise in process through 2023.
- Kentico's support for capabilities at the more sophisticated end of the DXP spectrum, including personalization, customer journey mapping, testing and optimization, customer data management and cloud support, lags behind that provided by other DXP vendors evaluated in this research.
- Kentico is relatively small and growing slowly, compared to many other DXP providers in this Magic Quadrant. It has work to do in order to regain momentum among customers and partners amid these shifts in product strategy and pricing, and packaging.

## **Liferay**

Liferay is a Niche Player in this Magic Quadrant. Its PaaS or SaaS DXP is Liferay Experience Cloud, and on-premises deployments are supported by Liferay DXP. All offerings include capabilities for experience management, content management, personalization and analytics. Liferay is headquartered in Diamond Bar, California, U.S., and also has a presence in Latin America, EMEA and the Asia/Pacific region. Its DXP is often deployed by organizations in the manufacturing, telecommunications, government and financial services sectors, and is used for B2B, B2C and B2E use cases.

## **Strengths**

- Liferay's DXP appeals to organizations that want or need to support complex and secure environments on-premises, through traditional hosting or in the cloud.
- Liferay updated its pricing and packaging to a subscription license for the whole suite, regardless of use, which provides some security to prospects with concerns about increasing costs based on greater use.
- Liferay's extensible architecture and pure-play portal heritage make it well-suited for use cases that blur the boundary between traditional B2C experiences and implementations requiring heavy integrations and custom front-end and back-end application development.

## **Cautions**

- Liferay's low-code product enhancements for developers and business users may require the latter to take additional training to overcome complexities and master the system.
- Liferay Experience Cloud is less appropriate for simpler, mainstream website and multichannel use cases, and is more focused on developing integrations to unify underlying services. Some B2C use cases can be challenging due to its limited digital marketing features, such as personalization, customer journey mapping, customer data management and less sophisticated content management.

- Liferay's momentum is slowing compared to other vendors in this Magic Quadrant, as Gartner clients perceive lower innovation and confusion with product strategy, leading to Liferay being left off of shortlists.

## **Magnolia**

Magnolia is a Visionary in this Magic Quadrant. Its DXP is called Magnolia and has capabilities that include content management, personalization and search. It is available on-premises or as a PaaS offering in a public or private cloud. Magnolia is headquartered in Basel, Switzerland, and has some presence across North America, EMEA and the Asia/Pacific region. Investment company GENUI took a majority stake in Magnolia in 2022. Magnolia 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. It is most often used for B2C and B2B use cases.

### ***Strengths***

- Magnolia embraces a composable approach, integrating adjacent technologies through no-code connector packs for multiple capabilities and low-code microframeworks for others. The vendor has spent the time and effort to ensure seamless integration of these third-party capabilities natively within the Magnolia UI.
- Magnolia Cloud supports hosting headless front-end applications. This can be a benefit to clients looking to deploy JavaScript delivery without the skills or additional infrastructure from another vendor or service.
- Magnolia has made strong progress with partnerships, with generally expanded strategic alliances that increase the options for expanding capabilities outside of the core platform offerings.

### ***Cautions***

- The platform has a deliberately narrow scope, which means that some key capabilities rely heavily on integrated third-party applications such as analytics, AI and customer data.
- Geographic coverage outside Europe and parts of the Asia/Pacific region remains low, but is expanding in North America. Prospective Magnolia customers should carefully evaluate the availability of experienced resources and implementation partners in their geography.
- Nontechnical users report initial complexities with Magnolia's UI, and the administrative interface could be improved. Prospective clients should ensure adequate training postimplementation.

## **OpenText**

OpenText is a Challenger in this Magic Quadrant. Its DXP is OpenText Experience Platform, and its capabilities include content management, analytics, personalization, optimization and DAM. It is available on-premises or can be hosted on a public cloud through Microsoft Azure, Amazon Web Services or Google Cloud Platform; on a private cloud through OpenText Private Cloud Services;

or as a fully managed service. OpenText is headquartered in Waterloo, Ontario, Canada, and has a global presence. OpenText is used in a variety of verticals, including manufacturing, government, retail, financial services and insurance. It is most often deployed for B2C use cases, but is also applicable to some B2B use cases.

### **Strengths**

- 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.
- OpenText's technology is extensible and customizable, supported by APIs for integration, documentation and the recently launched developer community.
- OpenText provides the capabilities to support a broader information management strategy beyond the scope of the DXP, including customer communications management, document management, content services and content collaboration. This may be beneficial to organizations looking to create a single vendor relationship.

### **Cautions**

- Potential DXP customers don't often consider the OpenText Experience Platform unless they have already made substantial investments in the vendor's other information management offerings. This is because OpenText isn't as innovative as some of its competitors in terms of addressing cutting-edge requirements such as DXC, composability and SaaS.
- While OpenText has expanded its cloud options, it remains largely unproven in the market, with few success stories.
- OpenText's CDP story, a crucial factor in the immediate and long-term effectiveness of a DXP, is a work in progress and relies primarily on integration with Google Marketing Platform.

### **Optimizely**

Optimizely is a Leader in this Magic Quadrant. Its DXP is called Optimizely and includes content management, personalization, customer data management and analytics capabilities. It is available on a subscription basis as a hybrid cloud solution, employing some SaaS components with management UIs, orchestrated around a single-tenant PaaS. Optimizely is headquartered in New York, New York, U.S., with a presence across EMEA and in parts of the Asia/Pacific region. Optimizely acquired Welcome (a content marketing platform) in December 2021. Its DXP is most often used at midsize-to-large enterprises in retail, manufacturing and distribution, high tech, healthcare, commercial services, and financial services. It is most often used for B2C and B2B use cases.

### **Strengths**

- Optimizely offers a broad set of digital experience capabilities that suit both customers looking for a suite approach and those that wish to mature with the platform in a modular manner.

- Optimizely's pricing and packaging are simple, scalable, modular and transparent compared to competing offerings. Consistent use of metrics for pricing and removing limits on channels and users are well-regarded by its customers and prospects.
- Optimizely's updates to better support headless (JavaScript) natively in the UI, along with Liquid templating and hosting for JavaScript front ends, provide additional options for diverse delivery needs.

### **Cautions**

- Rationalization and integration of multiple technologies acquired by Optimizely are still lacking a unified UI, while cross-product functionality between acquired and organic products remains nascent.
- Optimizely's lack of unified analytics reporting across the platform makes discovery of actionable insights disjointed.
- Many of Optimizely's products remain available stand-alone, but marketing messaging leans toward the suite approach, which causes some buyer confusion.

### **Progress**

Progress is a Niche Player in this Magic Quadrant. The core of its DXP, known as Sitefinity DX, is a WCM product, which is complemented by Sitefinity Insight for personalization and optimization, and by Corticon for decisioning, forms and business process management. The portfolio also includes differentiating capabilities such as NativeChat, a configurable conversational interface. The offering is available on-premises or as a fully managed PaaS in the form of Sitefinity Cloud. Progress is headquartered in Burlington, Massachusetts, U.S., and has a significant global presence, both through its own efforts and via partners. Sitefinity DX is typically aimed at midsize organizations looking to grow, and is most frequently deployed for B2C marketing use cases.

### **Strengths**

- The vendor's new business unit focused on digital experience management across content, design and development demonstrates a commitment to the DXP space and should result in improved coordination of Progress' product portfolio for DXP customers.
- Progress' strong multiexperience story is manifest in ThemeBuilder, a tool geared to implement and coordinate experience design across web and mobile apps and components.
- Sitefinity customers report that the product is easy for marketers and content contributors to use, even for relatively complex tasks, such as form creation and content targeting.

### **Cautions**

- Progress' cloud strategy lags behind other vendors in this research that are making faster progress toward SaaS as a deployment model. While the vendor offers a choice between on-premises and PaaS (via the Sitefinity Cloud offering), SaaS is not an option and many customers are still deployed on-premises or in IaaS. The vendor's customers are likely to miss

out on some of the unique benefits of a true, multitenant SaaS cloud infrastructure, such as upgradability.

- Some customers note the absence of templates and prebuilt modules that would ease deployment and reduce dependency on third-party development and design.
- Progress' DXP is more limited in regard to integrations, extensibility and customizations compared to other vendors in this Magic Quadrant. Some Sitefinity DX customers report issues with upgrades, integration, and cloud and data migration.

## **Sitecore**

Sitecore is a Leader in this Magic Quadrant. Sitecore's portfolio includes three "clouds" organized around common use cases and buying patterns: Content Cloud, Engagement Cloud and Commerce Cloud. Its all-in-one DXP, available on-premises or as a PaaS, is Sitecore Experience Platform (XP). Sitecore also offers a SaaS solution called Experience Manager Cloud (XM Cloud) that was announced in July 2022. Other products in the DXP stack include Sitecore Search and Sitecore CDP (both released during the course of 2022); Sitecore Personalize; Sitecore Content Hub (CMP/DAM); Sitecore Connect (released in October 2022), a hub for integration between Sitecore and third-party systems; and others. Sitecore is headquartered in San Francisco, California, U.S., and has a presence in EMEA and the Asia/Pacific region. Sitecore's DXP is used across many verticals – most often financial services, manufacturing and automotive.

## **Strengths**

- Sitecore continues its journey toward composability and the cloud, with a focus on supporting its customers' need to build iteratively rather than all at once. The vendor is also increasingly supporting DXC with demonstrated support for integrating with third-party systems, including third-party content management systems.
- Sitecore has also invested in technology that reduces time to market and improves applicability to vertical markets. New site templates act as project accelerators to enable marketers and developers to accelerate project delivery through use of a consistent starting point. XM Cloud also supports partners and customers building their own templates and increasingly employing low-code and no-code features.
- Sitecore is redoubling efforts to improve support, guidance and customer success as organizations migrate and transform their digital experience strategies. The Sitecore360 customer success program offers a wide range of onboarding services, recommended practices, structured learning, instructor-led training and proactive support, and assurance activities, such as checks, reviews, workshops and optimizations.

## **Cautions**

- Customers and prospects face a challenging decision: While XM Cloud is the clear route to a modern, composable approach, it remains less proven in the market given its recent release in July 2022. It also lacks some of the feature parity of the vendor's more seasoned, monolithic XP offering, such as web forms and the more sophisticated personalization available in the

Sitecore Personalize product (sold separately), but not in Sitecore xDB (which comes as part of XP).

- Sitecore is rationalizing and reorganizing its extended product portfolio, much of which has come through a succession of acquisitions over the last two years to catch up with other Leaders in this Magic Quadrant. The incorporation of acquired products has created customer confusion over multiple products that can deliver similar functionality (XP, XM and XM Cloud) and multiple deployment models (PaaS, SaaS and on-premises).
- Sitecore's transition entails pricing and packaging changes that are impacting both current and prospective customers. While current customers struggle with the burden of a substantial increase in investment, prospects face a complicated feature/function and cost-benefit analysis.

## **Squiz**

Squiz is a Niche Player in this Magic Quadrant. Its DXP platform is Squiz DXP, which includes capabilities for content management, search, personalization, data management and integration. It is available on-premises and as SaaS. Squiz is headquartered in Sydney, Australia, and has a small presence outside the Asia/Pacific region in geographies such as North America and EMEA. Squiz DXP is most often deployed by midsize organizations in the government, utilities and higher education verticals. It is used for B2C, B2E and B2B use cases.

## **Strengths**

- Squiz's DXP provides experience and solution accelerators along with prebuilt integration recipes that, while limited today, have the opportunity to accelerate time to value for its customers.
- Squiz Workplace provides prebuilt collaboration and knowledge sharing capabilities that could reduce implementation times for B2E scenarios.
- Squiz provides differentiated government and higher education vertical solutions, and has experience in the specific needs of and integrations in these industries.

## **Cautions**

- Squiz has made some progress in expanding sales in North America and the U.K., but remains limited in geographic resources and partners outside the Asia/Pacific region. Prospective customers should ensure that skilled resources are available in their regions.
- Squiz's DXP lacks feature sophistication and breadth across multiple areas, such as personalization, customer journey mapping, customer data management, and analytics and optimization. Customers with these requirements should plan to complement Squiz with third-party best-of-breed products.
- Squiz has limited business growth and a slower pace of innovation as compared to other vendors in this research.

## Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

### Added

- No vendors were added to this Magic Quadrant.

### Dropped

- Oracle, due to its focus on the larger scope of Oracle Advertising and Customer Experience suite of applications that goes beyond the scope of a DXP
- Salesforce, due to a change in product strategy and no longer going to market with a specific DXP product

## Inclusion and Exclusion Criteria

### Business Criteria:

- **Revenue:** Each vendor's DXP offering must have generated revenue of at least \$17 million, with at least 5% year-over-year revenue growth in the 12 months leading up to June 2022. Revenue includes perpetual licenses and/or cloud subscription and maintenance revenue. Professional services, training, onboarding and infrastructure/hosting revenue were excluded. The vendor must have acquired at least 10 net new customers in the 12 months leading up to June 2022.
- **Market presence:** Each vendor had to have been marketing and selling its DXP product since at least June 2020.
- **Geographic coverage:** Each vendor had to have a market presence in at least two of the following regions: North America, Latin America, Europe, Middle East and Africa, Asia/Pacific and Japan. Regional market presence is represented by dedicated offices and employees and/or partners in a region. At least 20% of a vendor's total revenue had to come from at least two of these regions.
- **Partner ecosystem:** Each vendor had to demonstrate the ability to deliver implementation support for customers via a certified partner ecosystem containing at least 10 implementation agencies and systems integrators.
- **Vertical market coverage:** At least 20% of the vendor's revenue had to derive from at least three of the following verticals: banking and securities, communications, media and services, education, government, healthcare provision, insurance, manufacturing and natural resources, retail, transportation, utilities, and wholesale trade. The vendor's DXP marketing had to target customers in at least three of these sectors.



- **Ecosystem activity and market interest:** Each vendor had to have an active ecosystem around its DXP, as evidenced by Gartner’s assessment of the market. This ecosystem may include aspects such as community forums, books and seminars, as well as client, partner and channel activity (by IT services firms, systems integrators, design agencies and advisory firms). Gartner also considered the degree of market interest in each vendor’s DXP, as measured by the number of end-user clients’ inquiries to Gartner analysts made via a Gartner call center or at Gartner events.
- **Go-to-market approach:** Each vendor’s go-to-market approach had to demonstrate explicit mention of its DXP in its go-to-market activities, such as positioning, marketing, messaging, pricing and packaging for its DXP. We examined aspects such as thought leadership, product marketing and product management, public presentations, events, customer experience, digital presence, social media presence and sentiment, partner channel, word of mouth, and sales strategy.

#### Product Criteria:

- **Product packaging:** Each DXP’s native product capabilities had to be available as an integrated product, under one product name.
- **Use-case support:** Each DXP had to be able to support, as a cohesive and integrated product, at least two of the three use cases – namely B2C, B2B and B2E.
- **Product capabilities:** The DXP must have:
  - *Natively:*
    - Content management capabilities for managing various content types, including (but not limited to) textual content, graphics and other rich media, web content, mobile app content, chatbot content, and voice content
    - Rich, extensible, interoperable and well-documented production/consumption APIs
    - Support for multiexperience presentation, orchestration, delivery and assembly of digital experiences via hybrid and/or headless capabilities
    - Cloud capabilities; each DXP had to be available for cloud deployment as PaaS (with or without managed services) and/or SaaS
  - *Either natively or via integrations (including with OEMs):*
    - Account service capabilities, including registration, login and password management with authentication and access control
    - Customer data management capabilities

- Customer journey mapping capabilities
- Personalization, analytics and optimization capabilities
- Practical applied AI capabilities

## Evaluation Criteria

### Ability to Execute

Organizations evaluating DXPs have wide-ranging requirements, as they often need to support multiple audiences. Broad functionality supporting different DXP deployment scenarios, long-term viability, a demonstrated track record of meeting customers' needs and an expanding market presence are important aspects of Ability to Execute in this market.

**Product or Service:** This criterion concerns core products that compete in the defined market. Included for consideration are current products, quality, feature sets, skills and so on. Products can be offered natively or through OEM agreements and partnerships. Product assessments focus on essential DXP functionality, integration, scalability, manageability, security and ease of deployment. Special consideration is given to product integrity, given some vendors' tendency to provide a collection of disconnected products and features, rather than a cohesive platform.

**Overall Viability:** This criterion includes an assessment of a vendor's financial health, overall success and product vision, together with the likelihood that it will continue to invest in its product. The assessment concerns both a vendor's overall financial health and the financial and practical success of the relevant business unit. During the assessment, the organization's cash and equity position, growth in the market, management, and financial strategy are evaluated.

**Sales Execution/Pricing:** This criterion relates to a vendor's capabilities in all sales activities and the structure that supports them. Included are deal management, pricing and negotiation, presales support, and the sales channel's overall effectiveness. Assessments are also made of the quality of the vendor's sales force, the sales force's alignment with the DXP strategy, market share, and the simplicity and predictability of pricing schemes.

**Market Responsiveness/Record:** This criterion concerns a vendor's ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customers' needs evolve and market dynamics change. It also considers the vendor's history of responsiveness to changing market demands. In addition, it considers the range and level of success of enterprise customers that use the vendor's DXP.

**Marketing Execution:** This criterion assesses general awareness of the vendor in the market, as well as any negative or positive perceptions of the vendor. It examines the clarity and efficacy of the vendor's programs designed to convey DXP messaging in order to influence the market, promote a brand, increase awareness of products and establish a positive identification in the minds of customers. This mind share can be created by a combination of publicity, promotional activity, thought leadership, social media use, referrals and sales activities. A clear understanding

by existing and prospective customers of the vendor's offerings and their development trajectory indicates successful marketing execution.

**Customer Experience:** This criterion concerns products and services and/or programs that enable customers to achieve anticipated results with the products evaluated. It assesses customer satisfaction, the quality of supplier-buyer interactions, technical support and account support. Other aspects examined include ancillary tools, documentation, customer support programs, customer success programs, availability of support communities and SLAs.

**Operations:** This criterion assesses a vendor's ability to meet its goals and commitments, as gauged by the quality of its organizational structure, skills, experiences, programs, systems, SLAs for cloud-based services, and other vehicles that enable it to operate effectively and efficiently.

**Table 1: Ability to Execute Evaluation Criteria**

<b>Evaluation Criteria</b> ↓	<b>Weighting</b> ↓
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	Medium
Market Responsiveness/Record	High
Marketing Execution	High
Customer Experience	High
Operations	Medium

Source: Gartner (March 2023)

## Completeness of Vision

Vendors that support a wide range of use cases, understand their customers' evolving needs, incorporate new customer demands into their product strategies and exhibit technological

innovation in their products exhibit good Completeness of Vision in the DXP market.

**Market Understanding:** This criterion assesses a vendor's demonstrated ability to understand and anticipate customers' needs and to translate them into products and services. Vendors with a clear vision for the market listen, understand customers' demands, and shape or enhance market changes using their vision. Vendors with the clearest DXP vision articulate their ambition while also listening and responding to buyers' demands, anticipating emerging needs, and reacting with an understanding of business demands, ecosystems and the competitive landscape.

**Marketing Strategy:** This criterion looks for clear, differentiated messaging that is consistently communicated internally and externalized through social media, advertising, customer programs and positioning statements. An effective marketing strategy is crucial to articulate differentiation from other DXP offerings and outmoded approaches to building and managing experiences specific to web and mobile presences.

**Sales Strategy:** This criterion looks for a sound sales strategy based on a demonstrated sales methodology that uses appropriate networks, including direct and indirect sales, marketing, service, and communication networks. It also assesses partners that extend the scope and depth of a vendor's market reach, expertise, technologies, services and customer base. In situations where a vendor offers multiple products geared toward DXP initiatives, it is essential to avoid channel conflict.

**Offering (Product) Strategy:** This criterion looks for an approach to product development and delivery that emphasizes market differentiation, functionality, methodology and features as they map to current and future requirements. The DXP market favors offerings that meet our core platform criteria, are integrated and rationalized, yet provide easy integration and extension capabilities, and are thus interoperable. Product and solution packaging are also important considerations.

**Business Model:** This criterion examines product revenue growth and the ease of doing business with customers. We also look for a strong partner ecosystem that amplifies the vendor's go-to-market strategy. We examine how the business model is aligned with the business objectives and requirements of existing and prospective DXP customers.

**Vertical/Industry Strategy:** This criterion assesses a vendor's strategy for directing resources (for sales, products and development), skills and products to meet the specific needs of individual market segments, including industries. Vendors must demonstrate versatility through their capabilities and expertise in various industries, as demonstrated via vertical strategies.

**Innovation:** This criterion looks for direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, and defensive or preemptive purposes. DXPs enable and exploit innovation in modern architecture, analytics, AI, knowledge graphs, context awareness, the Internet of Things and user experience design to offer differentiated, continuous and engaging digital experiences.

**Geographic Strategy:** This criterion assesses a vendor’s strategy to direct resources, skills and offerings to meet the specific needs of geographies other than its “home” geography, either directly or through partners, channels and subsidiaries, as appropriate for the geography and market.

**Table 2: Completeness of Vision Evaluation Criteria**

<b>Evaluation Criteria</b> ↓	<b>Weighting</b> ↓
Market Understanding	High
Marketing Strategy	High
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	Medium

Source: Gartner (March 2023)

## Quadrant Descriptions

### Leaders

Leaders have ample ability to support a variety of DXP use cases and consistently meet customers’ needs over substantial periods. Leaders have delivered significant product innovation in pursuit of DXP requirements, and have been successful in selling to new customers across industries.

## Challengers

Challengers demonstrate significant Ability to Execute, with strong businesses and customer bases, as well as products that suit current demands. However, they lack the vision of Leaders and Visionaries, and may therefore struggle to fully satisfy future demands from a technology or business perspective.

## Visionaries

Visionaries are forward-thinking vendors that demonstrate a firm grasp of emerging customer needs and the potential impact of new technology. However, they are lacking in terms of some aspects of their offerings, service and support, and/or business and partner ecosystems, which impairs their Ability to Execute.

## Niche Players

Niche Players focus on limited DXP deployment scenarios, have limited geographic presence outside their home market and/or focus on a narrow set of industries.

## Context

This Magic Quadrant evaluates vendors that meet Gartner's inclusion criteria for the DXP market. It is intended to aid selection decisions about vendors and products. Application leaders in charge of digital workplace applications focused on digital experience and customer experience initiatives should:

- Study the evaluation criteria by which we have determined each vendor's Ability to Execute and Completeness of Vision.
- Evaluate the vendors' Strengths and Cautions.
- Assess vendors in any of the four quadrants, with a focus on those that align with their requirements and goals.

The associated [Critical Capabilities for Digital Experience Platforms](#) aids vendor selection from a use-case and capability perspective. It should be used in conjunction with this Magic Quadrant.

## Market Overview

When organizations need to deliver highly contextualized digital experiences — beyond simple websites and mobile webpages — they require a DXP for breadth of functionality and the ability to cover an increasing variety of modalities and channels across customer journeys. DXPs are often deployed at the center of content operations ecosystems.

In 2023, the DXP market was influenced by these trends:

- **Digital experience composition:** Digitally mature prospects are looking to compose their own DXPs from modular, independent capabilities, and DXC is positioned as the point of composition for digital experiences. While some of the "leaner" DXPs provide a roadmap for this by building DXC capability and acting as a "center of gravity," broader suite DXPs are less

attractive to these buyers. An end goal of composability is to make this composition no-code; however, today, no true “composition platforms” exist. Going composable remains very much pro-code, and thus advanced digital maturity is required in those taking this path (see [Innovation Insight for Digital Experience Composition](#)).

- **Front end as a service:** Prior disruption in the DXP market by headless architectures has led to increased support of JavaScript frameworks natively within the WYSIWYG editor interface. Distinct from DXC, FEaaS is now provided by many vendors in response to the decoupled trend by offering support for the packaged hosting and management of those JavaScript front ends in the same cloud service to serve clients looking to adopt this delivery method. This provides customers and prospects with a less complicated management of the headless approach, both from a billing and architect’s perspective, as the service is visible in their cloud dashboards.
- **Composability:** Monolithic DXP suites are making slow progress toward composability, but a purely headless approach lacks the user-friendly business tooling of a monolithic close-coupled suite. The emerging composable approach remains developer-centric for managing the customer’s digital user experience. Many DXP vendors are on the path to modularize their offerings, but current vendor-defined composability tends toward using other technologies with their DXP, as opposed to having a composable platform themselves. There are many dependencies in the monolithic DXP that need to be overcome. Composability may become an existential threat to the single-vendor DXP market. However, composability remains nascent and many businesses prefer single-vendor solutions. As composability matures and “monolithic” vendors actively decompose their own solutions, these lines will begin to blur. However, already, instead of “buy or build” today, we can “buy, compose and build.”
- **SaaS:** DXP vendors have been successful because of their endless customization ability and integrations. This strength can also become a weakness when it comes to breaking changes in software updates, which has led to skipped upgrades for clients due to technical debt. DXP vendors, therefore, face a conundrum when it comes to “SaaSification” of their platforms – how to maintain the customizability, but offer an always up-to-date core DXP SaaS offering. There are a variety of approaches being pursued by vendors, from sideloading customizations through to low-/no-code solutions. Initial forays into SaaS offerings tend to have a list of limitations versus on-premises or PaaS versions of the DXP, and prospects should pay close attention to the differences. Clients should decode vendor-hosted options and ensure that they match their organization’s expectations (see [How to Navigate Cloud-Based WCM and DXP Solutions](#)).
- **Low code/no code:** No-code interfaces for business users have always been a focus and strength of DXP vendors. This enables nontechnical users to achieve much of the coordination required to manage the visitor experience without the frequent need for developer resources. With the trends in DXC and SaaS, vendors are increasing the footprint of low-code and no-code functionality. This reduces the required skills to develop against the stack in its native language, but also means that core platform updates in SaaS reduce breaking changes requiring effort to refactor code, which historically has been significant in PaaS or on-premises deployments.

- **CDP lite:** DXP vendors are starting to break apart their acquired and natively grown “customer 360” CDPs so that their customers have access to the basics for tracking and analytics across the DXP. This approach is likely to improve the utility and return on investment that customers will gain from customer data, and solves the issue of siloed data in acquired DXP functionality for vendors.
- **Employee experience:** As organizations move toward the “total Experience” which links the employee experience and the customer experience and renders them interdependent, some are choosing either to deploy existing DXPs for B2E use cases or to seek out packaged intranet applications. More organizations are looking to improve customer experience in part by improving employee experience and using a common platform to do so, while leveraging advancements in DXP (personalization, journey mapping, data management) to attract and engage employees whose connectedness, loyalty and productivity have been less certain since the start of the COVID-19 pandemic (see [Quick Answer: Should Organizations Use a Single DXP for Customer and Employee Experiences?](#)).
- **Content marketing platforms and digital asset management:** While out of scope for the core capabilities assessed in this Magic Quadrant, there continues to be a trend for vendor focus on DAM and content operations. DXPs are infrequently used to collaborate early in the formation of campaign or content ideation. DXP vendors are increasingly moving “earlier in the process” of content creation and collaboration through a combination of CMP and DAM acquisitions and native functionality to elevate their content management beyond an experience publishing engine. However, Gartner client inquiries have not surfaced any evidence of the desire to procure CMP, DAM and DXP capabilities all in one project. Therefore, this may remain a cross-sell opportunity or “land and expand” for vendors.

## Evaluation Criteria Definitions

### Ability to Execute

**Product/Service:** Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

**Overall Viability:** Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

**Sales Execution/Pricing:** The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

**Market Responsiveness/Record:** Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.



**Marketing Execution:** The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

**Customer Experience:** Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

**Operations:** The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

## Completeness of Vision

**Market Understanding:** Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

**Marketing Strategy:** A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

**Sales Strategy:** The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

**Offering (Product) Strategy:** The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

**Business Model:** The soundness and logic of the vendor's underlying business proposition.

**Vertical/Industry Strategy:** The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

**Innovation:** Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

**Geographic Strategy:** The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

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