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The Forrester Wave™: Digital Asset Management For Customer Experience, Q4 2014

by Anjali Yakkundi, November 25, 2014

KEY TAKEAWAYS

OpenText, ADAM, HP, And North Plains Offer Competitive Solutions

Forrester's research uncovered a market in which OpenText and ADAM Software lead the pack. HP and North Plains Telescope rated as strong performers. Adobe, celum, Canto, MediaBeacon, Widen, and North Plains On Brand came in as contenders.

Customers Demand Deeper DAM Capabilities

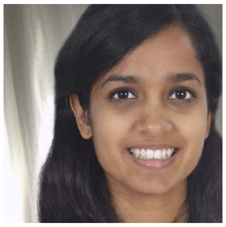
The DAM market is growing because more AD&D pros implement DAM solutions as a way to help marketers and eCommerce pros address media management challenges like video management, globalization/localization, rendition management, analytics tied to the content level, and content creation workflows.

Business-Centric Features Separate Leaders From The Rest Of The Pack

Legacy DAM technology has becomes outdated, with vendors offering little more than static repositories. Now, certain characteristics differentiate vendors: usability, strategic vision and direction, workflow, and globalization/localization.

Access The Forrester Wave Model For Deeper Insight

Use the detailed Forrester Wave™ model to view every piece of data used to score participating vendors and create a custom vendor shortlist. Access the report online and download the Excel tool using the link in the right-hand column under "Tools & Templates." Alter Forrester's weightings to tailor the Forrester Wave model to your specifications.



The Forrester Wave™: Digital Asset Management For Customer Experience, Q4 2014

OpenText And ADAM Lead, With HP And NorthPlains Close Behind

by Anjali Yakkundi
with Stephen Powers and Steven Kesler

WHY READ THIS REPORT

In Forrester's 38-criteria evaluation of digital asset management (DAM) vendors, we identified the 10 most significant software providers — ADAM Software, Adobe, Canto, celum, HP, MediaBeacon, NorthPlains On Brand, North Plains Telescope, OpenText, and Widen — in the category and researched, analyzed, and scored them. This report details our findings about how well each vendor fulfills our criteria and where they stand in relation to each other to help application development and delivery (AD&D) professionals select the right partner for their DAM needs.

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Notes & Resources

Forrester conducted lab-based evaluations in summer 2014 and interviewed 10 vendor and user companies: ADAM Software, Adobe, Canto, celum, HP, MediaBeacon, North Plains On Brand, North Plains Telescope, OpenText, and Widen.

Related Research Documents

The Forrester Wave™: Enterprise Marketing Software Suites, Q4 2014
October 21, 2014

The Forrester Wave™: Digital Experience Delivery Platforms, Q3 2014
July 22, 2014

Do You Need Digital Asset Management?
June 5, 2014

DAM PLAYS A NEW ROLE IN THE AGE OF THE CUSTOMER

Today, everyone is a content publisher. This is due to lower content creation costs (consider the cost of creating HD videos now versus five years ago) and the increasing need to deliver engaging, rich-media-driven experiences. As organizations across verticals morph to become content publishers, they increasingly need DAM solutions to both manage the content creation process and also manage finalized rich media content. The key drivers for this interest in DAM:

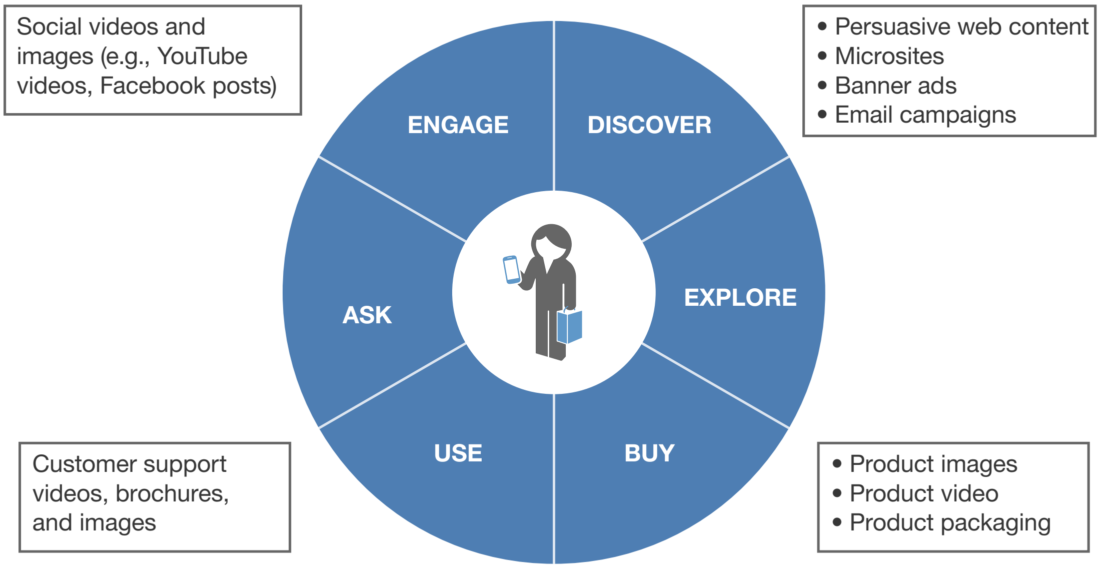
- **Omnichannel experiences drive a need for a core rich media management hub.** Rich media is important for delivering rich experiences across established channels like web, kiosks, digital signage, print, and mobile, as well as emerging channels like wearable devices and smart cars. This extra channel complexity — which requires the ability to manage multiple renditions of content, more robust rights management, and localized content versions, and the need to manage these customer-facing assets in a core content hub — has led many organizations to source DAM solutions.[1]

- **Experiences across the customer life cycle create complexities in managing rich media.** Customers use rich media content to engage with customers across the customer life cycle, not just for customer acquisition.[2] DAM solutions must effectively support both the increase in the amount of content with more scalable solutions, the ability to manage complexities like different content types (e.g., 3D and CGI for product packaging), and better integration with various systems (e.g., CRM and customer services tools, WCM, and eCommerce).

- **The need for greater marketing and business agility.** Firms are revamping marketing and business processes in order to ensure that marketing, eCommerce, creative, and other groups are able to quickly respond to customer needs.[3] As part of this, organizations look to DAM solutions to streamline content creation processes and to drive better content reuse.

Clearly, customer experience and marketing needs now drive the interest in DAM. As such, DAM has become a key system of record for an organization's business technology (BT) agenda.[4] Forrester defines the BT agenda as technologies, systems, and processes to help organizations win, serve, and retain customers.[5] DAM helps organizations support the most engaging, customer-facing content types — videos, images, 3D, etc. (see Figure 1).

Figure 1 Examples Of Rich Media Content Across The Customer Life Cycle



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TODAY'S DAM SOLUTIONS MUST SUPPORT TWO KEY AREAS OF CAPABILITIES

As the interest in DAM increases, customers' needs and expectations are rising. These firms are looking to DAM to help drive omnichannel experiences across the customer life cycle and to help drive greater marketing agility. In the age of the customer, organizations expect DAM solutions to support the following two areas (see Figure 2):[6]

- **Digital experience delivery.** DAM solutions must provide deeper functionality to prepare rich media content to be delivered globally and across channels. To do this, solutions must support vision and functionality to support greater automation in managing global/local versions of content, various renditions of content across channels, and integration with key systems of engagement.

- **Marketing and business agility.** DAM solutions must allow marketers and other business users to work with greater agility as well as operational efficiency and effectiveness.[7] To do this, DAM solutions must support vision and functionality to support greater business process management, automation for key content management tasks, and integration with a greater enterprise marketing technology ecosystem to fuel greater efficiency and effectiveness.[8]

Beyond just strategy, the market is struggling to keep up with user demands for capabilities and feature functionality. Many vendors offer just a basic, static repository that offers little more functionality than file shares or network drives (see Figure 3).

Figure 2 DAM Capabilities Support Marketing Agility And Digital Experience Delivery

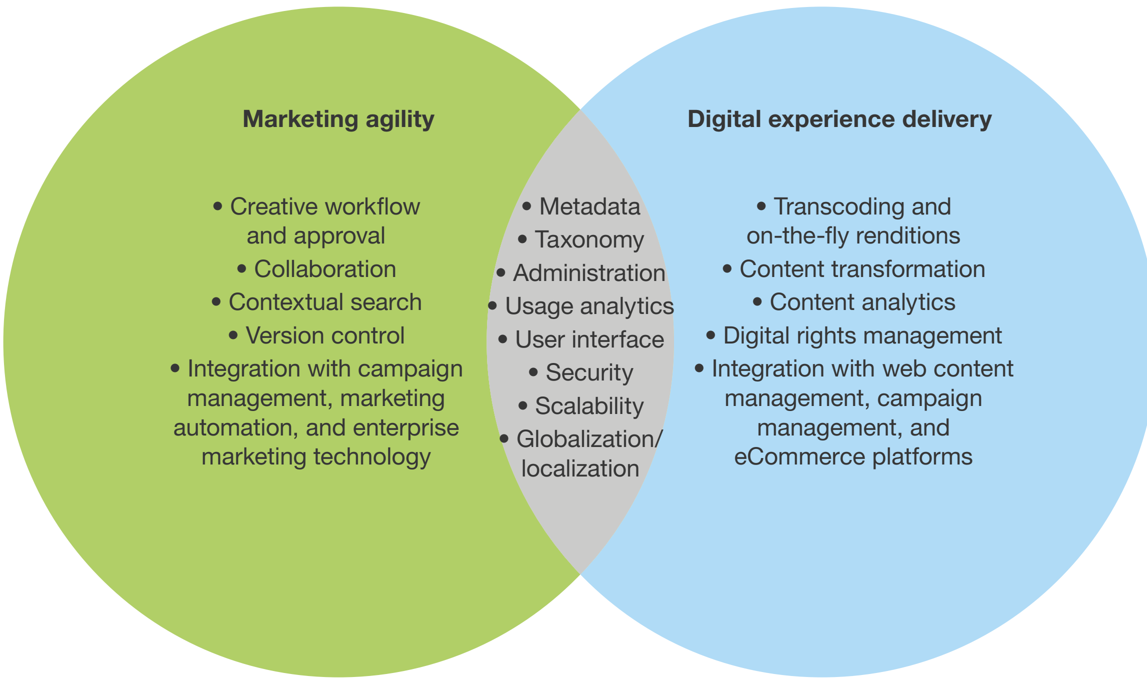

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Figure 3 DAM Vendor Capabilities Generally Fall Short

	What customers want	How most vendors fall short
Usability	• Web and mobile compatible UI • Tasks completed within 3 clicks • Intuitive interfaces require little training	• Web-only interfaces • Tasks completed in 3+ clicks • Non-intuitive interface that require training
Metadata	• Cascading metadata • Automated tagging and "smart rules" based tagging	Manual tagging
Taxonomy	• Configurable inheritance • On-the-fly taxonomies	Limited business-user flexibility for defining ontologies and relationships
Search	Contextual, predictive search	Static, tag-based search based on searching tags
Rights management	Flexible rights management based on expiration, region, embargo dates, etc.	Basic rights management via expiration date only
Globalization/ localization	Multi-level content inheritance with the ability to cascade changes	No clear hierarchical relationship.
Workflow and approvals	Complex approval workflows and integration with workflows from other systems	Basic workflows that support serial tasks
Rendition management	On-the-fly renditions for specific channels/device types	Manual transcoding for specific channels/device types
Integration	• Packaged connectors • Integration frameworks • Open APIs	API-level integration only
Analytics	Link customer analytics data back to the content level for content optimization	No capabilities

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VENDORS COME FROM MANY BACKGROUNDS TO SUPPORT RICH MEDIA NEEDS

Despite the interest in DAM from clients, surprisingly few stack players have entered the market; in fact, some of the biggest players in the digital experience and marketing technology space (e.g., salesforce.com, IBM, Oracle, SAP) have not touched the best-of-breed DAM space. Instead, the market remains fragmented and littered with niche players. The players include:

- **Stack vendors focused on DAM as part of a broader narrative.** Vendors such as Adobe, Hewlett-Packard (HP), and OpenText provide broad offerings that go beyond just rich media management. Their overall vision and broader portfolio focuses on areas like enterprise content management and enterprise marketing. Interestingly, while other stack vendors (e.g., SDL, salesforce.com, Oracle) haven't gotten into the best-of-breed DAM space, they have greatly increased capabilities for embedded DAM functionality.[9]

- **Long-time players continue to move beyond their publishing roots.** These vendors focus exclusively on DAM, are often veterans of the DAM space, and include players like Canto, North Plains Telescope, North Plains Xinet, and MediaBeacon. As a whole, they've begun to expand support beyond traditional use case and support marketing- and customer-experience-driven use cases. These vendors must innovate or face extinction.

- **Emerging vendors look to capitalize on a fragmented market.** These pure-play vendors — most founded in 2000 or beyond — are trying to capitalize on a fragmented market space. Vendors in this space include, but are not limited to, ADAM Software, celum, WebDAM, and Widen Enterprises. These vendors must continue to innovate or else lose out due to the market presence and legacy track record of stack and long-time players, respectively.

DIGITAL ASSET MANAGEMENT EVALUATION OVERVIEW

To assess the state of the DAM market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top DAM vendors.

DAM Evaluation Criteria: Current Offering, Strategy, And Market Presence

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 38 criteria, which we grouped into three high-level buckets:

- **Current offering.** We focused on DAM vendors across major categories: workflow and approval; metadata, taxonomy, and search; globalization/localization; foundational library services; and marketing-centric capabilities, including integration with other digital experience and marketing technology solutions.

- **Strategy.** We reviewed each vendor's strategy, evaluating its strategic vision and planned enhancements. In particular, we gauged how well evaluated vendors positioned themselves in a fragmented marketplace and how they plan to align themselves to support marketing agility and digital experience delivery. We also evaluated execution on this vision by weighting heavily enterprise traction, enterprise track record, and customer reference satisfaction.

- **Market presence.** To determine a vendor's market presence, we took into consideration each vendor's installed base, vertical penetration, company financials, professional services, global presence, and license and reseller partners.

Included Vendors Demonstrated Enterprise Interest, Traction, And Thought Leadership

Forrester included 10 vendors in the assessment: ADAM Software, Adobe, Canto, celum, HP, MediaBeacon, North Plains On Brand, North Plains Telescope, OpenText, and Widen. Each of these vendors has (see Figure 4):

- **Forrester client interest.** Forrester clients express interest in learning more about the evaluated vendors, frequently asking about the evaluated vendors within the context of inquiry, advisory, and/or consulting.

- **Enterprise market traction.** Included vendors are often competing for enterprise class deals (based on knowledge gathered from Forrester client interviews, customer reference interviews, and vendor responses to anonymized survey), and illustrate vision and thought leadership within the DAM space.

- **Revenues totaling at least $10 million.** All included vendors must have total annual revenue of approximately $10 million. The revenue cutoff was kept low in order to recognize the large number of small players in the emerging rich media management market.

MOST VENDORS BATTLE IT OUT TO BE CONTENDERS, WHILE ONLY FEW LEAD

The evaluation uncovered a market in which (see Figure 5):

- **OpenText and ADAM Software lead the pack.** Long-time player OpenText demonstrated all-around robust functionality and has supported some of the most complex enterprise deployments, though middling strategy threatens to hold them back. ADAM Software, a new leader in this space, illustrated forward-thinking vision, increasing market traction, and depth in certain areas, but the product has some key foundational gaps that must be addressed.

- **HP and NorthPlains Telescope offer competitive options.** HP and North Plains Telescope ranked as Strong Performers, and both solutions offer all around breadth in functionality and have strong enterprise track records for complex, enterprise deployments. But both also suffer from the same problem: middling strategy and challenges with execution. Solving this challenge and making improvements to core DAM functionality will bring these vendors to the leader position.

- **Six vendors fight to remain relevant or gain traction in the market.** Adobe, MediaBeacon, celum, Widen, Canto, and North Plains On Brand battle it out in the Contender category. Each of these products illustrated strength in certain categories, whether it be largely improved core DAM features (e.g., Canto, MediaBeacon, Adobe), usability (e.g., Widen, On Brand), or strategy (e.g., celum). However, each of these vendors must continue to round out features, usability, integrations, and strategic vision and execution in order to remain relevant.

This evaluation of the DAM market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

Figure 4 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product evaluated
ADAM Software	ADAM 5 v5.2
Adobe	Adobe Experience Manager, Assets v6.0
Canto	Cumulus v9.1
celum	celum Enterprise Edition v5.7
HP	MediaBin v8.1
MediaBeacon	R3volution v6.6
North Plains	On Brand v2.7
North Plains	Telescope v9.2
OpenText	Media Management 7.3.1
Widen	Media Collective v7.2

Vendor selection criteria
Forrester client interest. Forrester clients express interest in learning more about the evaluated vendors, frequently asking about the evaluated vendors within the context of inquiry, advisory, and/or consulting.
Enterprise market traction. Included vendors are often competing for enterprise class deals (based on knowledge gathered from Forrester client interviews, customer reference interviews, and vendor responses to anonymized survey), and illustrate vision and thought leadership within the DAM space.
Revenues totaling at least $10 million. All included vendors must have total annual revenue of approximately $10 million. The revenue cutoff was kept low in order to recognize the large number of small players in the emerging rich media management market.

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Figure 5 Forrester Wave™: Digital Asset Management For Customer Experience, Q4 '14

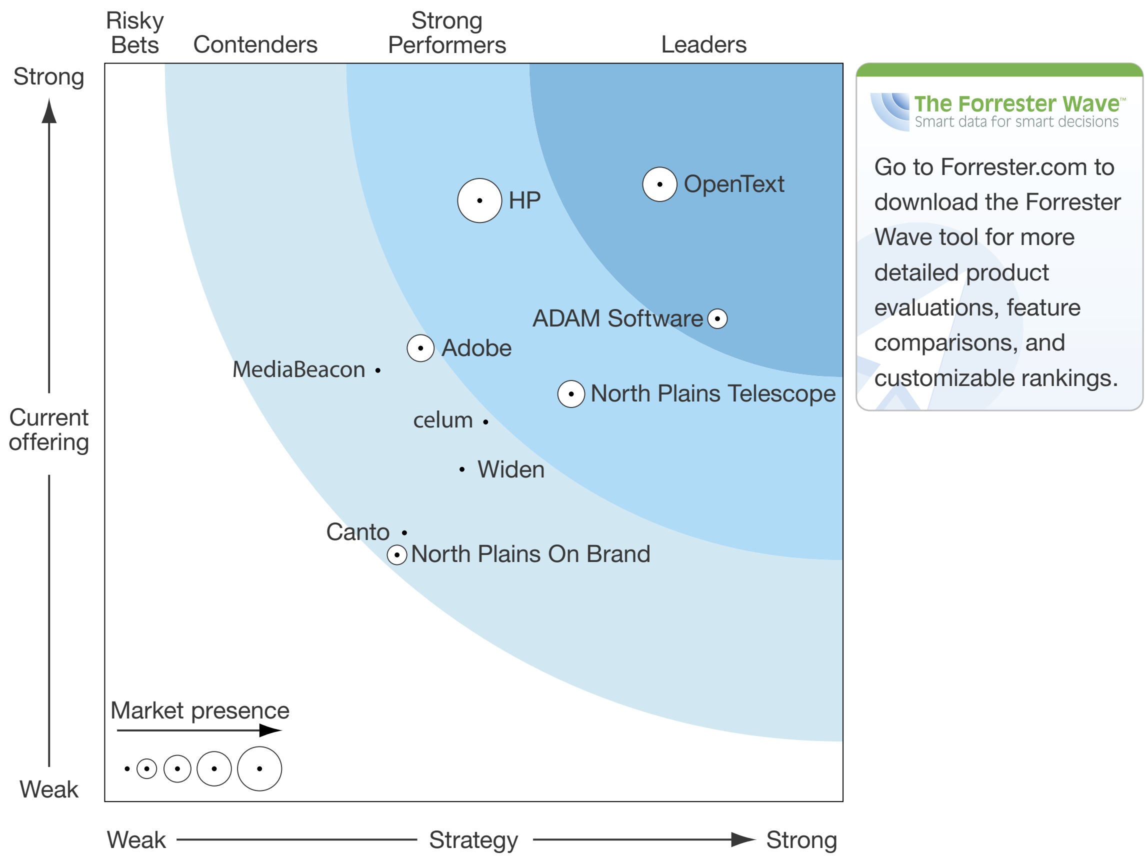

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Figure 5 Forrester Wave™: Digital Asset Management For Customer Experience, Q4 ‘14 (Cont.)

	Forrester's Weighting	ADAM Software	Adobe	Canto	celum	HP	MediaBeacon	North Plains On Brand	North Plains Telescope	OpenText	Widen
CURRENT OFFERING	50%	3.27	3.07	1.82	2.57	4.07	2.92	1.67	2.76	4.18	2.25
Workflow and approval	15%	4.40	3.10	1.15	3.70	4.30	1.35	1.80	3.00	4.40	2.80
Metadata and taxonomy support	19%	2.01	2.66	2.33	2.67	5.00	4.33	1.34	3.00	4.67	3.00
Globalization and localization	16%	4.25	1.70	1.55	1.65	3.30	1.95	1.95	2.85	4.50	0.80
Foundational library services	17%	3.64	3.74	2.80	3.70	4.24	3.00	2.43	3.14	4.70	3.40
Video support	17%	2.70	3.50	1.10	1.40	4.90	4.10	0.75	2.95	3.30	1.10
Marketing tools	16%	2.96	3.75	1.84	2.36	2.48	2.33	1.81	1.56	3.47	2.27
STRATEGY	50%	4.15	2.14	2.03	2.58	2.54	1.85	1.98	3.16	3.76	2.42
Product road map and strategic direction	25%	4.00	3.00	2.00	3.00	3.00	0.00	3.00	3.00	3.00	3.00
Enterprise track record	22%	3.00	1.00	2.00	3.00	3.00	3.00	2.00	4.00	5.00	2.00
Enterprise customer feedback	19%	5.00	1.00	5.00	5.00	1.00	3.00	3.00	1.00	3.00	5.00
Services partner network	10%	5.00	3.00	1.00	1.00	3.00	3.00	1.00	3.00	3.00	0.00
Professional services	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Delivery model	4%	1.00	2.00	1.00	3.00	1.00	3.00	3.00	1.00	1.00	2.00
Enterprise market traction	20%	5.00	3.00	0.00	0.00	3.00	1.00	0.00	5.00	5.00	1.00
MARKET PRESENCE	0%	1.66	2.98	1.00	1.00	5.00	1.00	1.68	2.01	3.98	0.67
Overall revenue	33%	1.00	5.00	1.00	1.00	5.00	1.00	2.00	2.00	5.00	1.00
DAM revenue	34%	1.00	1.00	1.00	1.00	5.00	1.00	3.00	3.00	2.00	1.00
Customer base and geographic and vertical market penetration	33%	3.00	3.00	1.00	1.00	5.00	1.00	0.00	1.00	5.00	0.00

All scores are based on a scale of 0 (weak) to 5 (strong).

VENDOR PROFILES

Leaders

- **OpenText leads the pack with robust functionality, but isn't necessarily for beginners.** Waterloo, Ontario-based OpenText offers a flexible platform with an impressive list of customer references. Accordingly, functionality is robust, with strengths in foundational capabilities: metadata, taxonomy, search, workflow, and globalization. The product also integrates with SAP systems (e.g., SAP CRM, SAP hybris) and with other OpenText solutions. Key functionality gaps primarily revolve around business-centric functionality, with customer references noting poor usability for users and admins, as well as challenging implementations and upgrades.

  DAM fits well into OpenText's strategy around enterprise information management. However, the strategy around DA M to support digital customer experience and marketing agility has changed little since Forrester's last evaluation in 2012. OpenText must continue to evolve strategic vision to remain relevant, or else risk becoming an outdated legacy solution. OpenText is best suited for organizations with high-end DAM needs that have the resources to manage and maintain a complex platform.

- **ADAM Software offers a leading vision and robust functionality, but has foundational gaps.** Ghent, Belgium-based ADAM Software has gained traction within Europe and North America and boasts a number of global deployments. The solution has impressive functionality in workflow and globalization/localization. ADAM has also increased its partnerships, deepening ties to other .NET vendors like Teradata Aprimo and Sitecore, and services partners. ADAM still has major gaps, most glaringly around search and metadata support, which are surprisingly far behind other vendors. Another gap is usability, which clients describe as adequate at best.

  ADAM Software's vision is a key area of strength: It has a comprehensive, forward-thinking vision to use DAM as a backbone for digital experience delivery (including commerce) and enterprise marketing ecosystem. Included as part of this is a vision to support deeper product content management outside of the traditional DAM scope. Some reference customers however, worry that ADAM's far-reaching vision may threaten focus on foundational DAM improvements they seek from the vendor. ADAM is best-suited for organizations with marketing and eCommerce-centric DAM needs, and those that may have increasing global complexities.

Strong Performers

- **HP continues to offer robust functionality, but has lost market momentum.** Palo Alto, California-based HP's MediaBin product is a long-time DAM player that has changed hands often, most recently with HP's acquisition of Autonomy. MediaBin is strong in foundational areas like: metadata, taxonomy, search, workflow, video, and library services. However, many clients question whether HP's touted metadata and video capabilities are more hype than function, and most weren't using much of these capabilities. Additionally, the product still has some fundamental gaps around usability, globalization/localization, and challenging implementations and upgrades.

HP's strategy places DAM squarely with its other customer experience-oriented solutions, like WCM and testing and optimization. HP has recently renewed investment in marketing solutions, but some customers and prospects question the commitment to DAM among the broader HP software portfolio. Many Forrester clients have moved off MediaBin due to questions around HP's commitment to the product, as well product complexity. HP is best suited for organizations with complex rich media management needs, particularly around metadata and taxonomy, and firms already invested in other HP Autonomy tools.

- **North Plains Telescope offers breadth of functionality, but struggles with execution.** Toronto, Ontario-based North Plains recently acquired DAM solutions Vyre and Xinet to join its flagship product, Telescope.[10] Telescope has supported many enterprise deployments and the vendor increased improvements in areas like video and search. While no one capability of the product stands out as particularly best-in-class, it does have a breadth of capabilities that meet most organization's needs. The most cited areas of improvement are usability and integration with other key systems, where they've done little to capitalize on partnerships with vendors like SDL.

  North Plains' real challenge is execution. Their three DAM products significantly overlap and are not integrated together. Telescope customers also report that new versions are unstable on release, professional services are shaky, and there's no formal account management (one reference firm noted they called "whoever would listen" when there were account challenges). It's worth noting that NorthPlains has recently hired new upper level management team to help fix these operational issues. North Plains Telescope is best-fit for firms looking for overall breadth of functionality for enterprise deployments and that have internal DAM expertise to support it.

Contenders

- **Adobe makes big strides, but falls short of its best-of-breed vision.** San Jose, California-based Adobe has worked to decouple its DAM from its WCM solution (which are built on the same platform), selling the solutions both together and separately. Adobe has made a myriad of feature improvements in areas like collaboration, foundational library services, and integration with other Adobe (e.g., Adobe Creative Suite) and non-Adobe (e.g., SAP hybris) solutions. Key gaps include support for metadata, taxonomy, and globalization/localization. Clients have noted challenges in scaling the product, particularly for large, enterprisewide deployments.

Adobe uses its DAM to bridge its Marketing Cloud and Creative Cloud. Overall, Adobe's vision for marketing technology is very strong.[11] But for DAM, Adobe's strategy is stuck between offering DAM as a best-of-breed versus the reality of the solution, which are embedded capabilities built on top of a WCM foundation. Customers also note challenges with Adobe's sales and professional services, noting they have little DAM-specific knowledge. Adobe is best suited for organizations that have already invested in various components of the Adobe Marketing Cloud and those that are looking to support departmental deployments to digital marketing groups.

- **celum improves functionality but still has work to do to gain traction in the market.** Linz, Austria-based celum has made significant improvements since our last evaluation. The most notable enhancements are around workflow and foundational library services. celum has also worked to increase vendor partnerships, like WCM vendors EPiServer and e-Spirit. The product, however, still has notable gaps, particularly around metadata, taxonomy, and globalization. The services partner network also needs work, as most customers must either rely solely on celum professional services or a fledgling hodgepodge of niche providers.

  celum's strategy focuses on traditional DAM needs, managing social content, and product content management. Overall, the vision is strong, acknowledging DAM's growing role in marketing efficiency and digital experience delivery. However, the vendor still has some work to do to better communicate and streamline its messaging as it's moving up market and into North America. celum is best-suited for organizations looking for an enterprise DAM solution without the extra bells and whistles, particularly those with a strong European presence.

- **For MediaBeacon, it's all about the metadata . . . but little else.** Minneapolis, Minnesota-based MediaBeacon is razor-focused on differentiating with its metadata, taxonomy, and search support, all of which are robust. Additionally, it's worked to maintain a core partner network which includes both Cognizant (which resells a software-as-a-service (SaaS) version of MediaBeacon with added accelerators) and IBM (which also resells the solution). But little innovation has been done on the product, with major gaps around workflow and approval and globalization. Additionally, clients report that despite the updated, HTML5 interface, usability remains a significant challenge.

  Besides features, MediaBeacon's biggest challenge is strategy. The company showed no real vision around supporting marketing operations and digital experience delivery. Professional services also remains a tremendous challenge for MediaBeacon customers—we regularly hear from customers who wait 6-12 months for bug patches, and even then will have to contact the MediaBeacon CEO directly to get the patch. MediaBeacon is best suited for organizations with heavy focus on metadata, taxonomy, and search, and with large internal development resources or strong partners to make up for the vendor's shortcomings.

- **Widen's strategy evolves, but must fill functionality gaps to remain relevant.** Madison, Wisconsin-based Widen Enterprises offers a SaaS solution. Since our last evaluation, they have begun expanding support for enterprise marketing deployments. Interestingly, they were one of the only vendors that showed us functionality to bring customer analytics data back to the content level. They also showed improvements in areas like metadata and search support. But even in those areas, and others (like globalization/localization and foundational library services), the product still generally lags behind other vendors.

  Since our last evaluation, Widen has significantly revamped its strategy and now focuses on positioning the solution within a greater marketing technology landscape. The strategy has begun resonating with the market, but Widen still has work to do to better differentiate against the many other so-called "marketing technology" vendors on the market and distinguish DAM's unique value proposition in the space. Widen is best suited for organizations looking for a SaaS solution that they can start within departments and expand across a larger marketing organization.

- **Canto shifts its strategy, but lightweight functionality holds them back.** Canto is a long-time player in the DAM market, and has updated its solution, particularly around support for metadata and taxonomy, foundational library services, and integration. But even with these improvements, functionality is generally far behind some of its competitors. Increased capabilities are needed across the board, especially to transform the solution away from being just a static repository. This includes enhancements in areas like approvals, globalization/localization, video, and library services.

  Canto's strategy has evolved since our last evaluation, and positions the solution as a key customer experience technology. But Canto has significant work to do to better differentiate against the myriad other "customer experience" vendors on the market, and distinguish DAM's unique value proposition in the space. Additionally, while Canto has been strong in the mid-market, they still struggle to gain traction in the enterprise space. Canto is best suited for organizations looking for lighter-weight, lower-cost alternatives for departmental level deployments.

- **North Plains On Brand is lightweight, at best, but with best-in-class usability.** Toronto, Ontario-based North Plains acquired SaaS solution Vyre, now rebranded as On Brand, to support organizations with heavy brand management and content consumption needs. As such, the product is strongest in its usability — unlike many other vendors in this evaluation, clients reported high satisfaction with the user interface (UI). But outside of this, capabilities are lightweight at best. To meet the brand portal vision, the solution must increase functionality across all areas, but particularly in search, metadata, taxonomy, video, and foundational library services.

Like with Telescope, On Brand must better integrate (both technically and strategically) with North Plains' other offerings, as the solutions have significantly overlap and have not been integrated together. The On Brand product helps complement Telescope with greater usability and brand management capabilities. Customer references did report On Brand has executed better than the Telescope product in terms of account management and services due to strong legacy On Brand teams. North Plains On Brand is best suited for organizations looking for a SaaS DAM solution to serve as a lightweight brand management portal.

SUPPLEMENTAL MATERIAL

Online Resource

The online version of Figure 5 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution:

- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.

- **Product demos.** We asked vendors to conduct demonstrations of their product's functionality. We used findings from these product demos to validate details of each vendor's product capabilities.

- **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with three of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to http://www.forrester.com/marketing/policies/forrester-wave-methodology.html.

Integrity Policy

All of Forrester's research, including Forrester Waves, is conducted according to our Integrity Policy. For more information, go to http://www.forrester.com/marketing/policies/integrity-policy.html.

ENDNOTES

[1] Companies have shown interest in DAM due to the increasing use of rich media assets, such as photos, graphics, and video, to support marketing agendas. Forrester clients across industry verticals have begun implementing and adopting global DAM solutions. For example, Forrester recently spoke with enterprise stakeholders in verticals like consumer packaged goods, healthcare, retail, travel and hospitality, and financial services, all of which either had an enterprisewide DAM solution in place or were considering getting one. See the January 24, 2014, "Market Overview: Digital Asset Management, 2014" report.

[2] The world your customers live in is complex — a maze of media, devices, conversations, and interactions — and to make a connection between them and your brand means finding new ways to stand out to the right audience. Marketing has to facilitate that complex engagement across the customer life cycle, from when customers initially identify a need, research their options, and make and use a purchase. See the October 14, 2014, "Evaluate Marketing's Customer Life Cycle Maturity" report.

[3] These future roles require AD&D leaders to shift from organizations designed to deliver primarily back-end services and internal applications to ones that also support customer-facing applications. This transition will take years — so AD&D leaders must start on it now. See the September 10, 2014, "Build Your Dream Team: Organizing To Deliver Exceptional Digital Experiences" report.

[4] Marketing leaders need help mastering context to deliver relevant and appropriate engagement in specific touchpoints. This tier in the engagement platform uses services to capture and serve up that context. See the July 29, 2014, "Top Technologies For Your BT Agenda" report.

5 While the broad edicts are the same across all businesses, the strategy, investment, and institutional specifics are not. The BT agenda must factor enormous business, technology, and political complexity. Stakes will be high; rewards and risks, significant. See the August 21, 2014, "Applying Technology, Systems, And Processes To Win, Serve, And Retain Customers" report.

6 Face it: Your technology-empowered customers now know more than you do about your products and services, your pricing, and your reputation. Technology has tipped the balance in favor of the customer. They can buy anything instantly and have it delivered to anywhere. And in a world of global sourcing and efficient supply chains, your competitors can copy or undermine the moves you take to compete. Your only successful response — the only way to retain customers and their loyalty — is to become customer-obsessed. See the September 12, 2014, "The CIO's Blueprint For Strategy In The Age Of The Customer" report.

7 Change is accelerating. Only the agile company can survive. But what constitutes agility in the modern era? An agile enterprise embraces change as a matter of routine, whether that change is driven by market trends or is internal and operational; it reacts more quickly to both threats and opportunities. Agile companies enable decisions to be made quickly at lower levels in the organization; leaders concentrate on building this culture over day-to-day decision-making. See the September 9, 2013, "The 10 Dimensions Of Business Agility" report.

8 Forrester has defined DAM as a core technology to the enabling digital experience delivery for enterprise organizations. The others include: A/B and multivariate testing; eCommerce; email marketing platforms; mobile analytics; online video platforms; optimization; portals; product content management; recommendations engines; site search; social depth platforms; web analytics; and web content management. See the April 4, 2014, "14 Digital Customer Experience Tools To Engage With Your Customers" report.

9 Adjacent technology solutions — such as web content management, eCommerce, product information management, campaign management, email marketing, marketing resource management — have increased functionality for managing rich media. Many organizations now struggle with the question: Do we go with a best-of-breed DAM solution or should we use the embedded rich media management functionality we've already invested in? See the June 5, 2014, "Do You Need Digital Asset Management?" report.

10 The Vyre product has been rebranded, and is evaluated as On Brand in this Wave.

11 Two recent Forrester Wave™ evaluations include Adobe and position its solution near the top of the charts. See the October 21, 2014, "The Forrester Wave™: Enterprise Marketing Software Suites, Q4 2014" report and see the July 22, 2014, "The Forrester Wave™: Digital Experience Delivery Platforms, Q3 2014" report.

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