

The Forrester Wave™: ECM Business Content Services, Q3 2015

Our Evaluation Of 11 ECM Vendors And How They Stack Up

by Cheryl McKinnon

August 28, 2015

Why Read This Report

In Forrester's 31-criteria evaluation of enterprise content management (ECM) business content services vendors, we identified the 11 most significant software providers — including Alfresco Software, Box, EMC, Everteam, IBM, iManage, Lexmark International, M-Files, Microsoft, OpenText, and SpringCM — 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 enterprise architecture (EA) professionals select the right partner to manage their business' critical content.

Key Takeaways

Business Content Services Emphasize

Document Sharing, Collaboration, And Usability

Forrester has defined two categories of vendors by their strengths in serving business content and transactional content use cases. While many customers will still seek a single vendor for both sets of needs, the requirements are distinct enough to merit two separate Forrester Wave evaluations this year.

Veteran ECM Providers Dominate, But A New Crop Of Leaders Emerges

New Leaders, including Alfresco Software, Box, Everteam, Lexmark International, M-Files, and Microsoft, join established players EMC, IBM, and OpenText, but the relative strengths of the vendors remain diverse. Technology managers can download the Forrester Wave model to view the data used to score participating vendors and create a vendor shortlist.

Cloud Offerings Become A Credible Alternative For Business Content Services

Complex on-premises suites are transitioning to modern content platforms, often with subscription-based delivery and licensing models. New Forrester Wave entrants, such as Box, iManage, and SpringCM, and established vendors, including EMC, Lexmark International, and Microsoft, are investing in next-generation cloud platforms.

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Forrester conducted demonstrations and executive strategy briefings with 11 vendors: Alfresco Software, Box, EMC, Everteam, IBM, iManage, Lexmark International, M-Files, Microsoft, OpenText, and SpringCM.

Related Research Documents

[Five Key Trends That Are Shaping How We Manage Enterprise Content](#)

[The Forrester Wave™: ECM Transactional Content Services, Q3 2015](#)

[Rethinking ECM: Content Finds Its Place In Agile, Mobile, And Growth-Focused Enterprises](#)

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ECM Continues To Coalesce Around Two Use Cases

Worldwide, Forrester estimates enterprise content management to be a market worth \$9 billion in 2015.¹ Nearly 90% of current ECM decision-makers plan to expand their rollouts over the next year.² This year, Forrester took a fresh approach to its evaluation of ECM solutions. In 2011 and 2013, we tracked how well key vendors managed both transactional and business content. We have now formally split the evaluations into two separate Forrester Waves to reflect the two distinct scenarios.³

Business Content Drives The Day-To-Day Workplace Experience

Business content typically originates inside the enterprise, but the growing need to work with external stakeholders — customers, partners, regulators, and citizens — is changing how EA professionals assess their vendors and prioritize requirements. Business content includes familiar formats, such as office documents, spreadsheets, email, and multimedia. This type of content captures insights and informs a wide range of business activities. The content may be formal (with structured templates or forms) or informal (created ad hoc). Key capabilities include flexible user interfaces, document management, team collaboration, search, and secure file-sharing.

Transactional Content Drives Customer-Focused Processes

Transactional content often originates outside of the enterprise, from third parties such as customers and partners. Complex workflows or business process management (BPM) tools support these high-volume activities. Transactional content includes scanned faxes or print streams generated from back-office applications. Many companies mine customer interactions to find patterns and trends in what clients say to predict how they might behave in the future. Readers can find a deeper assessment in the transactional content services space in the Q3 2015 ECM transactional content services Forrester Wave.⁴

Foundational Repository Services Are Table Stakes For Both ECM Categories

Core library services such as check-in/checkout, access controls, life-cycle management, search, and taxonomy (metadata and/or folder structures) continue to be essential capabilities for ECM technologies that address the business, transactional, or both, use cases. These core capabilities are also fundamental to the emerging content platform market, whereby both established and new vendors offer modern, cloud-friendly repositories that serve as the foundation for mobile-enabled content applications.⁵

Vendors Put The Needs Of Information Workers First To Succeed

Forrester's survey of ECM decision-makers shows consistent results year-over-year. Better search and better sharing of content persist as top business drivers behind an ECM deployment — and have since 2009. Digitization of business processes and regulatory or legal compliance are also key drivers.⁶

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Traditional ECM vendors were initially slow off the mark in their response to end user demand for simpler web and mobile interfaces, intuitive search, and simple sharing with internal and external users. This delayed response opened the door to new competitors.

Busy Information Workers Want To Find And Share Content

Newer players, focused on collaborative content use cases, have capitalized on established ECM vendors' delayed investment in usability, particularly for simpler search and sharing. While many of these newer vendors are weaker in high-volume transactional content processing or advanced life-cycle management features, they have filled a gap in the ECM market for day-to-day business content. Forrester notes that since the 2013 Forrester Wave:

- › **Vendors have embraced the requirement to share content with external parties.** Features to support the secure, external sharing of content with trusted partners, customers, or agencies are largely mainstream for ECM vendors focusing on business content. Differentiation across vendors now relates to elegance of the user interface and the pricing or licensing models to support this capability at scale.
- › **Search has continued to evolve with faceted, conceptual, and semantic approaches.** Nearly all of the evaluated vendors support faceted search — using metadata or other attributes to navigate or pivot through large results sets. Some vendors, but not all, continue to invest in search to reveal themes, concepts, or clusters of related documents, using statistical approaches or entity extraction capabilities.
- › **Analytics and data visualization have remained in an early delivery phase.** The next frontier for search innovation will be to incorporate more data visualization capabilities to allow users to navigate through large volumes of content using heat maps, tables, calendar widgets, or other cues. Proactive display of usage patterns, including mining social graphs of frequent collaborators, sets apart a couple of the evaluated vendors but is not yet typical.

Most — But Not All — Vendors Have A Vision For Their Next-Generation Platform

ECM today is predominantly deployed on-premises, and demand for the on-premises model will persist, particularly in highly regulated industries. Yet Forrester expects interest in cloud to shift over the next three to five years as enterprises refresh their ECM road maps.⁷ Major vendors such as Microsoft, with Office 365 and SharePoint Online, are providing compelling reasons for clients to look at cloud for content services. IBM is moving key ECM applications to its SoftLayer cloud, and EMC looks to its Pivotal team to supply infrastructure for its next generation of content services. The accelerating move to cloud to create, store, and share business content has compelled vendors to make investments in newer architectures. These newer platforms are designed for the elastic, flexible, and large-scale storage requirements of cloud:

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- › **“Born cloud” vendors such as Box and SpringCM lead in cloud-to-cloud integration.** As enterprises invest in software-as-a-service (SaaS)-based process applications, the requirement for a content hub — a system of record — for supporting documents will increase.⁸ Cloud offerings for these applications, such as CRM or human resources (HR) applications, will be top areas of SaaS growth from 2015 through 2016. Bi-directional integration with Salesforce, for example, sets Box and SpringCM apart from traditional on-premises ECM providers.⁹
- › **The shift from suite to platform is more than rebranding.** Vendors are shifting to cloud-first road maps, but the assembled-via-acquisition architectures of the previous century have hit their expiration dates. Many of the vendors evaluated have recently re-architected their core content repository services, are in the process of doing so, or are building entirely new, next-generation platforms as part of an ongoing commitment to ECM.
- › **Business content plays a role in the four-tier engagement architecture.** Enterprise architects who are serious about fast-tracking their moves to more digital — and mobile — engagement models are investing in four-tier architectures. This approach means a decoupling of client, delivery, aggregation, and services layers. Content repositories (whether on-premises or in cloud) are part of this services layer.¹⁰ The importance of interoperability services and open APIs will continue to rise, allowing content to become part of broader information ecosystems.¹¹

Explore Other ECM Vendors For Specific Use Cases

Several vendors that didn't meet all of Forrester's criteria for Forrester Wave inclusion also offer credible alternatives to the 11 vendors assessed here. Other key players to consider for the management of business content include:

- › **Fabasoft, for secure software-as-a-service (SaaS) ECM, especially for European firms.** Fabasoft serves the European market with SaaS-based document management, records management (RM), business process management, collaboration, and search capabilities and has particular strengths in Austria, Germany, and Switzerland. European data centers make this vendor an attractive choice for public sector and regulated industries with strict data sovereignty requirements.
- › **Hewlett Packard Enterprise, for strong document and records management needs.** Hewlett Packard Enterprise Records Manager 8.x, based on the Tower Software (TRIM) acquisition in 2008, is a solid offering to manage business content and has capabilities beyond just records management, despite its name. The offering was among the first ECM products to adapt a fully responsive design, mobile-friendly user interface. With the recent divestiture of the Worksite product portfolio to iManage, HP Enterprise Records Manager emerges as the vendor's primary content management product and benefits from integrations with its broader portfolio of eDiscovery and information governance technologies.

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- › **MicroPact, for case-centric content applications.** MicroPact has a foothold in US federal and state governments, offering a rapid-application development platform for content-rich case management applications. Commercial clients are also fueling recent MicroPact revenue growth and geographic expansion. MicroPact offers both private and public cloud SaaS options and received FedRAMP certification for its cloud services in 2014 and 2015.
- › **Nuxeo, for a technologically advanced, open source content platform.** Nuxeo Platform is architected specifically for development of enterprise content and process applications. The core platform, which includes packaged applications for document management, digital asset management, and case management, is available under Lesser General Public License (LGPL) open source licensing. Nuxeo's strategy is to provide an extensible content platform with a flexible API and strong support for open standards. This vendor derives revenue from support and maintenance subscription services and online customization tools for its open source platform.
- › **Upland Software, for ECM and work management.** The FileBound offering from Upland Software provides a solid set of document management, records management, collaboration, and workflow capabilities. Upland's focus is to deliver a set of capabilities for a business-centric approach to planning and managing work activities. Embedded analytics extract data from content to optimize work processes. Deployment options include on-premises, cloud, or subscription to the multitenant Filebound Cloud.

Evaluation Criteria For ECM: Business Content Services

To assess the state of the ECM for business content services market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of the top 11 vendors.

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 31 criteria, which we grouped into three high-level buckets:

- › **Current offering.** We assessed the technologies based on the breadth of the tool set, with particular emphasis on usability, ease of adoption, and fit for managing collaborative business content. We surveyed customers to get firsthand observation on the strength of particular capabilities.
- › **Strategy.** ECM vendors must show coherent strategies to help their customers manage business content within a broad information ecosystem that increasingly includes cloud-based enterprise applications, mobile use cases, external users, and the need for interoperability.
- › **Market presence.** We evaluated each vendor based on its current customer base, the size of its ECM offering revenue, its geographic presence, and its vertical focus.

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Selected Vendors Emphasize The Needs Of Users In Addition To Technology Managers

Forrester included 11 vendors in this assessment: Alfresco Software, Box, EMC, Everteam, IBM, iManage, Lexmark International, M-Files, Microsoft, OpenText, and SpringCM. Several of these vendors also have solid offerings in the transactional content services market, and we evaluated six of them in that Forrester Wave.¹² We selected vendors based on the following characteristics (see Figure 1):

- › **Breadth of functionality.** Each evaluated vendor includes specific functionality to support the creation, use, and management of business content. Key offerings include document management, collaboration, secure sync-and-share, search, and life-cycle management.
- › **Leadership in content management.** Selected vendors demonstrate the ability to shape the direction of the market, either through innovative delivery models or through their dominant market presence.
- › **A proven enterprise track record.** Included vendors have a solid existing customer base among customers with revenues of over \$1 billion and can integrate to the other enterprise applications that these companies rely upon. Additionally, vendors included had a minimum of approximately \$10 million in annual revenues.
- › **Interest from Forrester clients.** Forrester clients ask about the evaluated products within the context of inquiry, advisory, and/or consulting. These products are credible candidates for shortlist consideration when our clients are planning an ECM deployment.

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FIGURE 1 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product
Alfresco Software	Alfresco One (5.0)
Box	Box
EMC	Documentum Platform (7.2) Captiva (7.1) InfoArchive (3.1) Documentum xCP (2.1) Documentum D2 (4.2) My Documentum for Microsoft Outlook (7.1) Archive Services for SAP (7.0) EMC Documentum Records Management Suite (6.7) Document Sciences xPression (4.5) Syncplicity Enterprise Edition Connectors <ul style="list-style-type: none"> • Documentum Connector for Microsoft SharePoint (7.1) • Syncplicity Connector for Documentum (1.1)
Evertteam	Evertteam (5.1)
IBM	IBM Content Foundation (5.2.1) IBM FileNet Content Manager (5.2.1) IBM Datacap (9.0.2) IBM Case Manager (5.2.1) IBM StoredIQ (7.6) IBM Content Manager OnDemand (9.5.2)
iManage	iManage Work (formerly WorkSite) (9.2) iManage Insight (formerly Universal Search) (8.2) iManage Share (formerly LinkSite) (1.3) iManage Govern (formerly Worksite Records Manager) (6.2)
Lexmark Enterprise Software (Lexmark International)	Perceptive Content (7.0) Perceptive Intelligent Capture (5.6) Perceptive Search (10.3) Perceptive Connect (multiple ERP Connector products) Perceptive Document Filters (11.2) Perceptive Software Document Composition (6.0) Perceptive Acuo VNA (6.0.1) Perceptive Saperion In Place Migration Services Accounts Payable Automation (5.8) Perceptive Process (7.3) Processit (7.4) ReadSoft Online
M-Files	M-Files (10)
Microsoft	Microsoft SharePoint 2013

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FIGURE 1 Evaluated Vendors: Product Information And Selection Criteria (Cont.)

Vendor	Product
OpenText	OpenText Content Suite Platform (10.5 SP1) OpenText Content Intelligence [includes ActiveView and WebReports] (10.5) OpenText ECM Everywhere (10.5.2) OpenText Tempo Box (10.5.2) OpenText Electronic Signatures (10.5) OpenText eForms Management (10.5) OpenText Remote Cache (10.5 SP1) OpenText Process Suite (10.7) OpenText Contract Center (1.0) OpenText Discovery Suite (10.5. SP1) OpenText Auto-Classification (1.4) OpenText Semantic Navigation (1.2.1) OpenText Federated Query Search (10.0) OpenText Extended ECM for SAP Solutions (10.5 SP1) OpenText Microsoft SharePoint Services for Extended ECM for SAP Solutions (10.7 SP1) OpenText Vendor Information Management for SAP Solutions (7.5 SP4) OpenText Travel Receipts Management for SAP Solutions (3.5) OpenText Accounts Payable for SAP Solutions (9.8) OpenText Employee File Management for SAP Solutions (4.0 SP2) OpenText Archiving and Document Access for SAP Solutions (10.5 SP1) OpenText Application Governance and Archiving for Microsoft SharePoint (10.7 SP1) OpenText Extended ECM for Oracle E-Business Suite (10.5 SP1) OpenText Capture Center (10.6) OpenText AppWorks Gateway (1.2) OpenText System Center (1.0)
SpringCM	SpringCM

Inclusion criteria

Breadth of functionality. Each evaluated vendor includes specific functionality to support the creation, use, and management of business content. Key offerings include document management, collaboration, secure sync-and-share, search, and life-cycle management.

Leadership in content management. Selected vendors demonstrate the ability to shape the direction of the market, either through innovative delivery models or through their dominant market presence.

A proven enterprise track record. Included vendors have a solid existing customer base among customers with revenues of over \$1 billion and can integrate to the other enterprise applications that these companies rely upon.

Interest from Forrester clients. Forrester clients ask about the evaluated products within the context of inquiry, advisory, and/or consulting. These products are credible candidates for shortlist consideration when our clients are planning an ECM deployment.

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New Leaders Emerge; Criteria Shift To Mobility, Usability, and Flexibility

Our evaluation uncovered a market where new vendors are emerging as credible alternatives to established vendors (see Figure 2):

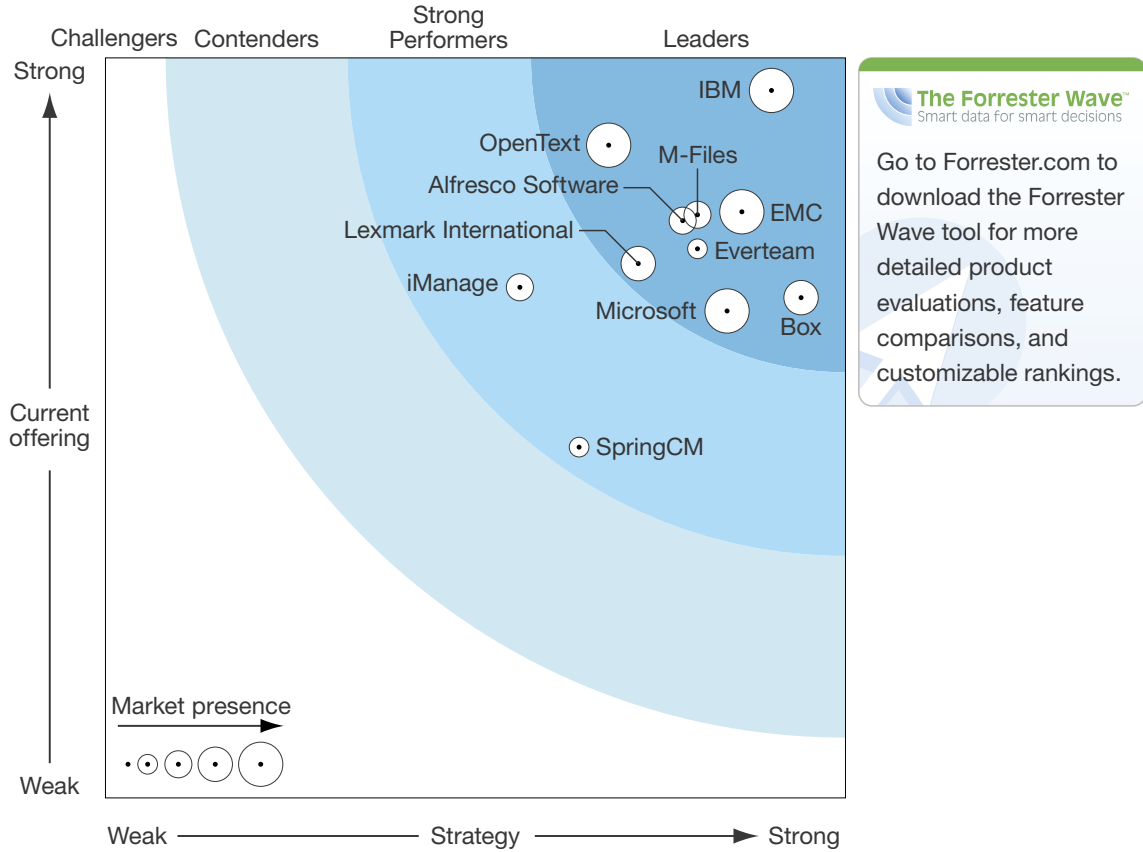
- › **Perennial Leaders EMC, IBM, and OpenText continue to offer broad capabilities.** Longtime Leaders in both the management of business and transactional content hold onto their top positions with balanced offerings to meet a broad set of collaborative, compliance-driven use cases.
- › **Alfresco Software, Lexmark International, M-Files, and Microsoft emerge as Leaders.** With this Wave's criteria focused on content sharing; findability; and flexible, modern architectures, these four vendors now cross into leadership positions. As enterprises assess their road maps for business content services, Forrester anticipates further traction with these vendors.
- › **Alternative vendors Box and Everteam are also Leaders.** These newer vendors offer increasingly credible alternatives to the traditional suite vendors, particularly for clients with a clear cloud-first, mobile-friendly, or analytics-driven content management agenda.
- › **Strong Performers iManage and SpringCM focus on specific markets.** iManage has long had traction in the legal, consulting, and professional services markets and sets its sights on being an innovator in work management beyond just document management. SaaS vendor SpringCM offers lightweight ECM capabilities but has a clear focus on supporting content management use cases related to sales and marketing requirements.

This evaluation of the ECM for business content services 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.

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FIGURE 2 Forrester Wave™: ECM Business Content Services, Q3 '15



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FIGURE 2 Forrester Wave™: ECM Business Content Services, Q3 '15 (Cont.)

	Forrester's Weighting	Alfresco Software	Box	EMC	Everteam	IBM	iManage	Lexmark International	M-Files	Microsoft	OpenText	SpringCM
CURRENT OFFERING	50%	3.90	3.38	3.96	3.71	4.78	3.45	3.61	3.94	3.29	4.41	2.37
System capabilities	100%	3.90	3.38	3.96	3.71	4.78	3.45	3.61	3.94	3.29	4.41	2.37
STRATEGY	50%	3.90	4.70	4.30	4.00	4.50	2.80	3.60	4.00	4.20	3.40	3.20
Product strategy	100%	3.90	4.70	4.30	4.00	4.50	2.80	3.60	4.00	4.20	3.40	3.20
MARKET PRESENCE	0%	2.50	3.95	4.55	1.80	4.75	2.50	3.55	2.05	5.00	4.70	1.55
Revenue	50%	2.00	3.90	4.10	1.10	5.00	2.00	3.10	1.10	5.00	4.90	1.10
Customers and markets	50%	3.00	4.00	5.00	2.50	4.50	3.00	4.00	3.00	5.00	4.50	2.00

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

Vendor Profiles

Leaders

- › **IBM leads with innovation in cloud and mobile; licensing constraints are a negative.** IBM has made important investments in its universal client, IBM Content Navigator, to offer consistent user experiences across web and mobile content applications. Strong support for modern APIs and interoperability standards positions IBM well in the multirepository, multivendor reality of the largest of enterprises. Strong offerings for life-cycle management, eDiscovery, and process management position it well for both business and transactional content management use cases. However, as large enterprises explore customer-centric use cases — such as sharing and managing documents with large numbers of external participants — IBM needs to refine its licensing models to meet this emerging ECM requirement.¹³
- › **EMC holds a leadership spot yet falls behind in its vision for collaboration.** EMC's Documentum and related client interfaces, such as D2, xCP, and Syncplicity (which was divested by EMC in July 2015), offer a broad range of ECM capabilities, particularly in areas such as life-cycle management, search, content intelligence, and file sync-and-share via the Syncplicity add-on.¹⁴ EMC has not innovated as quickly as competitors have in the key area of modern, intuitive, document-centric team collaboration. EMC offers a strong systems integrator and partner channel and is committed to delivering vertical applications for the specific needs of highly regulated

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industries. The Enterprise Content Division, as the line of business responsible for ECM at EMC, has a multiyear vision for its next-generation content platform that leverages the capabilities of sister companies Pivotal (for cloud services) and VMware (for virtualization).

- › **Box has key feature gaps but has created a methodical road map to address them.** Box's cloud-based content platform is often on the shortlist for secure and mobile content-sharing and document-centric collaboration use cases. In line with customer priorities, it is addressing key feature gaps in areas such as workflow, retention management, and extended metadata. For example, it launched extended capabilities for information governance in June 2015. A strong partner model, including IBM, also helps address advanced requirements such as case management or eDiscovery. Box's iterative, cloud-based delivery model is a differentiator, allowing it to measure customer adoption of new capabilities and use these insights to steer clear of the feature bloat that has plagued ECM. While Box does not support key interoperability standards such as content management interoperability services (CMIS), its representational state transfer (REST) APIs, handling billions of calls per month, allow it to integrate broadly. While adoption of Box by large, regulated industries continues to grow, Forrester continues to watch the long-term sustainability of its current business model.
- › **M-Files is unique with its strong metadata-centric approach to ECM.** M-Files continues to strengthen its presence in North America and offers a unique metadata-driven approach to categorizing documents, a welcome move away from the skeuomorphic folder-based interface used by most ECM vendors. A strong channel drives global growth, and M-Files has particular traction in industries with high quality and compliance requirements, such as life sciences and manufacturing. While M-Files does not support the CMIS standard for interoperability, it does support strong integration capabilities via its APIs, including REST. M-Files has solid document management, workflow, reporting, and team site support. Its cloud strategy supports the needs of enterprises seeking flexible hybrid options, enabling replication of documents from on-premises to cloud to meet remote access use cases.
- › **Alfresco Software continues its growth but needs to work on RM.** Alfresco Software provides a strong offering for ECM, particularly for customers that value interoperability, usability, hybrid cloud alternatives, and support for open standards and APIs. Alfresco has demonstrated a solid capacity to displace traditional ECM implementations due to relatively modern architecture, experienced partners, and its subscription-based pricing model. Increased investment in BPM with its Activiti project promises to bring it into a broader set of ECM opportunities over time. Life-cycle management and basic eDiscovery capabilities are among the weak spots for Alfresco, with its retention, disposition, and legal hold policies applicable only to "declared records" rather than to any type of managed content.
- › **OpenText is strong for compliance-driven use cases but not with user experience.** OpenText holds true to its longtime strategy of offering content life-cycle management, discovery, and security services for large enterprises, particularly those with rigorous regulatory compliance

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requirements. OpenText has made important investments in secure file-sharing, synchronization, and team collaboration with its Tempo product line and aggressive investments in cloud capabilities. Its recent acquisitions expand its global reach with data centers and accelerate its move to managed services and subscription revenue. However, further investment in user experience and modern user interfaces is still a work in progress. Of the major ECM vendors, OpenText lags in articulating its vision for its next-generation content platform.

- › **Everteam is strong in collaboration and analytics but has low brand recognition.** Everteam comes from a solid position in the European market, with a focused launch plan to expand into the North American market from 2015 to 2016. Its strategy will be to offer specific SaaS-based packaged content applications as it invests in its US operations. Everteam has an impressive set of capabilities for content analytics and embeds this as part of its core platform. Optional semantic analysis and categorization based on machine learning enhance sophisticated search. Basic life-cycle management addresses the needs of enterprises requiring consistent disposal or archiving policies, but this capability has not been certified for any of the major records management standards.
- › **Microsoft dominates ECM market share but needs partners for advanced capabilities.** Microsoft SharePoint continues to lead the market and mindshare for this market, and its assertive, cloud-first road map will compel many enterprises to consider cloud services for ECM.¹⁵ SharePoint's strengths continue to lie in its broad document management capabilities and support for collaboration and team sites as well as its support for integration and interoperability. Microsoft's cloud strategy for ECM focuses on Office 365 and SharePoint Online. This cloud offering represents its primary area of innovation, with key features such as file sync-and-share and social graphing delivered in the cloud first. Customers frequently use on-premises SharePoint as a platform for content applications and often extended it with partner applications or add-ons for advanced ECM capabilities such as records management, business process management, or email management.
- › **Lexmark International has strong capabilities but is still integrating acquired products.** Lexmark International has a strong set of business content services offerings, including document management, enterprise search, file sync-and-share, and life-cycle management. Lexmark has built out its ECM offerings largely through acquisition and continues its work to integrate these tools as well as build out its next-generation modular content platform, Perceptive Evolution. Workflow and document routing are also strong, with customer references rating these capabilities highly. Lexmark has a set of integration packages under the Interact branding that bring ECM capabilities into traditional on-premises enterprise applications as well as newer cloud-based applications such as Google Apps and Salesforce. Team collaboration is an area of weakness for Lexmark, although integrations for Microsoft SharePoint and portal products such as Jadu help fill this capability gap.

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Strong Performers

- › **iManage delivers solid document and life-cycle management but lags on collaboration.** Newly independent iManage, spun out of HP in July 2015, offers a solid set of foundational content management capabilities with particular strengths in document management with the Worksite product. Users can benefit from strong integrations to common authoring tools, including a rich client for Outlook. Worksite’s capabilities can be extended with continued partnership with HP Inc. for advanced process automation and electronic forms, along with analytics from HP Enterprise. Native collaboration and file sync-and-share capabilities are basic, with little synchronization between the LinkSite file-sharing tool and the ECM repository. Worksite does not currently support the CMIS standard for interoperability and lags on support for comprehensive support for REST APIs.
- › **SpringCM has a vision to be a content hub for sales automation and CRM applications.** SpringCM deserves consideration by enterprises that want to use content as a strategic asset within their sales and marketing automation activities. As a pure SaaS vendor, SpringCM has adopted a go-to-market strategy around the Salesforce ecosystem, helping companies align key content assets with customer records and sales opportunities and improving the experience of client-facing roles such as sales professionals. SpringCM has a solid set of cost-effective document management, task management, and file-sharing capabilities but lacks robustness in some of the features that ECM decision-makers may expect, such as advanced life-cycle management, eDiscovery, and support for multilingual environments.

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Supplemental Material

Online Resource

The online version of Figure 2 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 surveys.** To validate product and vendor qualifications, Forrester also conducted reference surveys of a minimum of 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>.

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Integrity Policy

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

Survey Methodology

Forrester's July 2015 Global Enterprise Content Management Online Survey was fielded to 268 technology management professionals. Forrester fielded this survey during July of 2015. Respondent incentives included a summary of the survey results. Exact sample sizes are provided in this report on a question-by-question basis. This survey used a self-selected group of respondents, Forrester contacts interested in enterprise architecture and content management, and is therefore not random. This data is not guaranteed to be representative of the population, and, unless otherwise noted, statistical data is intended to be used for descriptive and not inferential purposes. While nonrandom, the survey is still a valuable tool for understanding where users are today and where the industry is headed

Endnotes

- ¹ As CIOs prepare and manage their 2015 tech budgets, they can confidently push for an increase of 4% to 6% in their purchases of tech goods and services, depending on their country. To learn more about adjacent markets and the size and scope of markets such as enterprise content management, see the "[The Global Tech Market Outlook For 2015 To 2016](#)" Forrester report.
- ² Eighty-six percent of ECM decision-makers plan to increase their ECM deployment or usage, with 28% anticipating significant increase and 58% anticipating somewhat of an increase. Source: Forrester's July 2015 Global Enterprise Content Management Online Survey.
- ³ For the 2011 and 2013 ECM Waves, Forrester evaluated all vendors against one set of criteria and produced a Wave for overall, business, and transactional scores, using different weighting techniques. For 2015, Forrester has formally split the criteria, producing two separate evaluations. To learn more about key vendors in the transactional content services segment of ECM, see the "[The Forrester Wave™: ECM Transactional Content Services, Q3 2015](#)" Forrester report.
- ⁴ To learn more about transactional-focused ECM vendors, see the "[The Forrester Wave™: ECM Transactional Content Services, Q3 2015](#)" Forrester report.
- ⁵ For a deeper dive into the technology capabilities that comprise ECM, see the "[Assess ECM Suites, Platforms, And Point Solutions To Solve Content Challenges](#)" Forrester report.
- ⁶ Forrester fields an annual global enterprise content management online survey each year; the first survey launched in 2009, and the most recently fielded survey was in July 2015. Source: Forrester's July 2015 Global Enterprise Content Management Online Survey.
- ⁷ Currently, 65% of surveyed ECM decision-makers are deployed in their own data centers. Source: Forrester's July 2015 Global Enterprise Content Management Online Survey.
- ⁸ We project enterprise process applications to be the largest growth area for SaaS over 2015 to 2016. This category includes enterprise resource planning (ERP) and customer relationship management (CRM), among others. To learn more, see the "[The Global Tech Market Outlook For 2015 To 2016](#)" Forrester report.
- ⁹ To learn more about the use cases and benefits of integration ECM and Salesforce, see the "[Manage Your Customer Content In The Salesforce Context](#)" Forrester report.

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- ¹⁰ To learn more about the four-tier architecture for mobile engagement, see the “[Mobile Needs A Four-Tier Engagement Platform](#)” Forrester report.
- ¹¹ To learn more about real-world adoption of content management interoperability services standards, including CMIS, see the “[Mobilize, Monetize, And Harvest Enterprise Content With Interoperability Standards](#)” Forrester report.
- ¹² To read more about key vendors in the transactional content services segment of ECM, see the “[The Forrester Wave™: ECM Transactional Content Services, Q3 2015](#)” Forrester report.
- ¹³ In June 2015, Box and IBM announced a joint partnership. Forrester expects this new relationship to help IBM fill gaps in its ability to support external use cases. Source: “IBM and Box Forge Global Partnership to Transform Work in the Cloud,” IBM press release, June 24, 2015 (<https://www-03.ibm.com/press/us/en/pressrelease/47185.wss>).
- ¹⁴ As of July 2015, EMC divested itself of Syncplicity to private equity firm Skyview Capital but plans to continue reselling the product. It retains a financial stake in the company. Source: “EMC’s Syncplicity Business to be Acquired by Skyview Capital; EMC Will Remain a Financial Stakeholder,” Syncplicity press release, July 7, 2015 (<https://www.syncplicity.com/about-us/press/emcs-syncplicity-business-to-be-acquired-by-skyview-capital-emc-will-remain->).
- ¹⁵ Microsoft has consistently been named the most-used ECM platform for both document management and records management. Source: Forrester Research And ARMA Internationals Records Management Online Survey, Q2 2015 and Forrester’s July 2015 Global Enterprise Content Management Online Survey.

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