

White paper

ECM or best of breed WCM

Different technologies for different needs

Summary

Different needs, different technologies

The choice – and therefore debate – between 'suite' versus 'best of breed' software is as old as enterprise software. Enterprise Content Management (ECM) technologies claim to fulfill all of the content management needs an enterprise may have. In reality, organizations typically need specific technologies for specific business requirements.

SDL Tridion is a best of breed vendor that provides persuasive Web content management solutions that enable effective communication and interaction with multiple target audiences.

Table of contents

1	Introduction	
2	ECM versus best of breed	
2.1	ECM, the wrong kind of suite	3
2.2	A different perspective on suites	5
3	Different needs, different technologies	
3.1	Scenario: the maintenance manual.....	7
3.2	Scenario: operating procedures	8
3.3	The technical perspective	9
3.4	Conclusion	10
4	About SDL Tridion	

1 Introduction

The amount of content found in any enterprise is overwhelming, and grows continuously. Content includes any type of information or resource used by all parts of an organization. Operating procedures, e-mails, marketing materials, business correspondence, internal memos, and policies – so many types of content are essential for today's business. The importance of this content for a business should not be underestimated.

Content is crucial for many purposes including financial reporting, management information and regulatory compliance. Consequently, enterprises need IT systems to manage and use this content. Just as business data is stored and managed in databases and business applications, content is stored and managed in content management systems. IT systems for business data have been in mainstream use for many decades. Enterprise Resource Management (ERP), Customer Relationship Management (CRM) and custom built transaction systems are all well-established in the enterprise IT landscape.

In contrast, content management technology is relatively new. A healthy content management industry has emerged as the importance of all types of content has grown for today's organizations. This new industry spans a wide range of different technologies such as Records Management (RM), Web Content Management (WCM), Digital Asset Management (DAM), Document Management, collaboration tools and portals.

Organizations that want to invest in content management technology face a daunting task. Buyers are confronted with a huge choice of vendors and products, all offering to manage content and all with options that may sound the same. Categories in the market are not clearly established and competing trends, acronyms and new approaches that come in and out of fashion blur the picture even further. This variation and change places the responsibility on the customer, to make careful choices based on their own criteria.

Organizations must prioritize their content management requirements based on their business needs in order to distinguish between the best solutions for their content needs. Unfortunately, vendors often claim that "one size fits all", but experience and history have proven that this type of claim can lead to painful and expensive purchasing mistakes.

This paper examines SDL Tridion's position within the overall content management landscape as defined by business needs, rather than underlying technology. It also explains how organizations can combine different content management technologies to solve various business requirements.

2 ECM versus best of breed

A number of years ago market analysts introduced the concept of Enterprise Content Management (ECM). Advocates claim that all content in an enterprise should be managed by a single product or suite of products from one vendor, regardless of the content's purpose, format or underlying business process.

Figure 1 summarizes the different types of content management included within ECM. It also shows the target users and beneficiaries for each component technology. The software industry quickly picked up the ECM concept described by analysts. Many vendors claim to be ECM vendors. Typically, they originate from one of the content management technologies and build their ECM suite by acquiring smaller companies and by "integrating" these products.

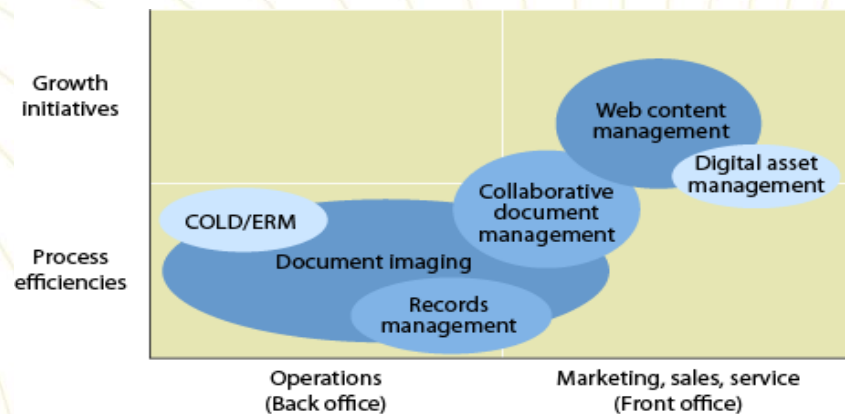


Figure 1: The Enterprise Content Management Dilemma: Point Solution or Suite?
Forrester, January 2005

The most important ECM claim is cost reduction through procurement and IT infrastructure consolidation. Of course, on its own, this sounds like an attractive proposition. As this paper will show, there are other considerations to be made.

2.1 ECM, the wrong kind of suite

The question is whether ECM can really deliver on all of its promises? Despite the strong movement towards ECM, the vendor strategy has several severe and fundamental flaws:

- **It fails to deliver on the promise** Whilst the license cost to acquire a full “ECM suite” from one vendor may seem favorable, there are few other benefits. As “suites” are assemblies of separate technologies from multiple acquisitions of unconnected technologies, little, if any of the promised IT consolidation can be delivered.
- **Resources tied up** As a direct result of the “acquire and integrate” strategy, ECM vendors have a huge task to integrate various products. This necessarily reduces their ability to deliver additional product development. Of course, this immediate issue may also have long-term implications for product development as component upgrades may affect these integrations too.
- **Limited expertise** Since ECM vendors attempt to be active in many aspects of content management, they are generally unable to acquire the same level of domain expertise as specialist vendors. As a result, their ability to innovate for specific business needs is limited.
- **Technology focus** Many ECM vendors consist of a collection of technologies. As a result, they focus on technology, rather than on business needs. This technology focus is particularly evident for organizations that need front office solutions that support growth initiatives (see Figure 1). In addition, many larger ECM vendors began in back office content management technologies such as Document Management, Collaboration and Records Management.
- **Long, risky implementation cycles** Since ECM attempts to address all of the content management needs of an enterprise, implementation cycles are long, costly and often deliver inadequate technology-driven results. ECM claims to benefit all departments in an organization. To implement an ECM requires the cooperation and training of these departments. Any project with such a wide scope creates huge risk of overrun or substantial failure.

As a result of these proven shortcomings, analysts have changed their view on ECM. While they still advise organizations to think in a holistic way about content management for the enterprise, they now suggest that organizations should carefully evaluate what combination of technologies (ECM or best of breed) best fits their specific business requirements. All major analysts confirm that best of breed vendors are gaining traction while ECM vendors are struggling to deliver on the promise and grow. For organizations, it makes more sense to buy different best of breed applications that focus on specific business requirements.

Enterprises can only grasp the business value envisioned in their ECM strategy by selecting the best products for specific purposes. This is the “best of breed” approach.

2.2 A different perspective on suites

SDL Tridion believes that content management requirements vary from one organization to another. For example, a front office process such as marketing is very different from a back office process such as handling insurance claims. This implies that the product selection processes must concentrate on business requirements first and use these requirements to select the appropriate technology.

As shown in Figure 1, back office processes need content management technology to deliver efficient processes, compliance benefits, and cost reduction. For insurance claims, the required process should be fast, rigorous and consistent to comply with the regulations and legislation.

In the front office, however, content serves a different role by supporting growth initiatives. Content is used to create relationships with target audiences (prospects, customers, partners) and to improve revenues, profit and customer satisfaction. As a result, the front office focuses on relevance, flexibility and speed:

- Interaction with target audiences is continuously monitored and improved.
- Organizations need to respond quickly to external factors such as market conditions.
- Time to market for new products and services is critical.
- Communication needs to be both consistent yet targeted.

The requirements for content management in the front office are entirely different from those in the back office. Professionals in the front office departments (corporate communications, marketing and customer service) have different characteristics and perform different tasks than those in the back office.

This provides compelling evidence that one approach cannot properly serve distinct requirements. SDL Tridion therefore believes that content management suites must be business oriented rather than technology oriented. SDL Tridion products provide organizations a way to establish and maintain effective communication with target audiences. It does this by putting non-technical professionals in control of efficient and cost effective communication for multiple Web sites, channels (print, Web, e-mail), languages, and audiences.

Transactional, business or persuasive content

Forrester Research supports this perspective on content management suites. The purpose of content rather than the format of content should determine content management requirements. Forrester identifies three types of content:

- **Transactional content** This content drives back office processes. Examples include scanned images, incoming faxes, letters and electronic records. Following processing, these types of content often need to be stored for legal purposes.
- **Business content** Organizations use this type of content to inform and support information workers within organizations. Examples include ideas, designs, recommendations, drafts and internal communication. This content needs to be secured, shared, presented, and used in collaborative processes such as product development.
- **Persuasive content** Organizations use this content to influence the behavior of audiences, such as customers, employees, investors, prospects and partners. Examples include product and service descriptions, marketing campaigns, offers, company profiles, user stories, and press releases. This kind of content needs to be published so that its intended audiences can access it through a variety of communication channels, including Web sites, e-mail, print, mobile devices and RSS feeds.

This new perspective on content clearly illustrates why organizations should focus on their business objectives rather than technology. From a technology perspective, the ECM strategy may seem to make sense (as long as it is content, we will manage it) but it does not reflect business reality.

It is therefore likely that the content management market will evolve into two clearly separated segments. ECM will be dominated by large infrastructure vendors and will continue to produce generic suites that focus on transactional and business content in the back office.

By comparison, the specific requirements of the front office will drive the growth of a new, separate market segment. This market segment will spawn a different suite of front office content management technologies, which includes current mainstream technologies (WCM and DAM) but also incorporates other technologies such as multi-channel delivery, brand management, personalization, audience management and international marketing.

3 Different needs, different technologies

As described in chapter 2, different business processes have fundamentally different content management requirements. This means that a single content management system is unlikely to meet all of these requirements. All major analysts agree that the best of breed vendors are gaining traction and even ECM vendors are retrenching into their original specialist niches. It therefore makes clear business sense for customers to identify their own requirements and select the most appropriate best of breed application based on these requirements.

Of course, there is a connection between business content, transactional content and persuasive content. For example, business content (product designs) may lead to the creation of persuasive content (a commercial offer to customers) which then results in transactional content (customer orders that require storage).

The following section describes how organizations can integrate their different chosen content management technologies and describes how R5 may be used with other back office content management products.

3.1 Scenario: the maintenance manual

This scenario describes the production, translation and distribution of a maintenance manual.

A maintenance manual is produced by the US-based product development team that is about to launch a new car model. After years of development, testing and reviews the new car model is ready for release.

The team used a document management system to create the manual. After final approval and desk top publishing, a PDF version of the manual was created for distribution. To minimize costs, the team has decided to distribute the manual only in electronic format, which also enables them to distribute updated versions to their customers easily. The product management team, part of the marketing department, distributes the manual.

The product management team uses SDL Tridion R5™ to launch and promote the new car model through the corporate Web site, an e-mail campaign, a micro site, and in updates to the dealer and customer extranets. They also need to publish the manual online. R5 enables them

to directly browse the Document Management system, select the document and publish it simultaneously to all of the online systems.

As this is a global launch requiring this whole launch process to be consistent and synchronized across 20 languages, R5 manages the translation process for them too so that any post-launch updates are also released in a single, reliable, consistent and coordinated process, as dictated by the requirements of the business, not the technology.

3.2 Scenario: operating procedures

Operating procedures are critical to the core business processes of every financial institution. As a result, they have to pass rigorous compliance processes.

In this scenario, the Central Instruction Manual (CIM) team is responsible for this process. The CIM team is located in the London headquarters of the financial institution. The team consists of people that know the business processes very well, including a compliance officer. The team also may include people from branch offices who provide knowledge about local regulations.

The CIM team uses a document management system to create the different instruction manuals that describe all the operating procedures. The documents are reviewed multiple times by different people before they are considered approved.

Since the operating procedures need to be available to all personnel inside the financial institution, the approved documents are published automatically on a special intranet site. In addition, some procedures are applicable to trading partners and suppliers and are published on an extranet site.

The documents are automatically transferred to R5 after they have been approved. The CIM team attaches metadata to the document, which determines whether the document will be available on the intranet or on the extranet as well.

The Bank has a large international presence; it has intranet and extranet sites in several national languages including English, Spanish and others. The CIM team, however, is responsible for operating procedures and R5 gives them full control over where they are published, updated and unpublished. The CIM team exercises this control directly, without the need for IT assistance. In addition, the special intranet and extranet sites provide

personalization to guide employees and trading partners to documents that are relevant to them.

3.3 The technical perspective

As discussed in the scenarios above, content management products often need to integrate with other business systems. This requires strong open interfaces, which can be accessed using a wide variety of standard technologies. Ideally, they should provide:

- Microsoft API
- Java API
- Cross-platform Web Service API

In addition, it most organizations want to use a single sign-on wherever possible in order to simplify user management. Many organizations also require integration with line of business systems (ERP, CRM) and technical middleware components to drive additional efficiencies.

In each of the scenarios outlined above, business users choose different ways to interact with their content management system. For example, they may choose to add documents to the Content Management System (CMS) manually for one process, automatically for another and in a third only have the CMS link to them but store them elsewhere. Each of these approaches has merit for different parts of an organization. The CMS should therefore support at least these three mechanisms, without introducing additional process steps.

In the maintenance manual scenario, documents could be manually added to R5. The product managers could choose to either import the documents into R5, or just store the link in R5. In the latter case, any updates made in the document management system would automatically become available in R5, and no additional steps would be required to republish an updated version.

In the operating procedures scenario, the documents could automatically be made available in R5 after workflow in the document management system was complete. The document could be physically imported into R5, so the CIM team can work on newer versions in the document management system. This import could be performed using the Web Services API of the Business Connector™, so the documents could easily be routed through the network of the financial institution.

3.4 Conclusion

This white paper has shown why organizations should carefully identify their real business requirements before choosing content management technologies:

- Determine whether content needs occur in the back office (transactional and business content) or in the front office (persuasive content).
- Identify business goals for back office and front office content and whether these goals have links between them.
- Identify specific requirements to achieve these goals.

By examining their actual situation, their business objectives and their consequent requirements, organizations can select the right technology for the right needs, focusing on business rather than technology.

4 About SDL Tridion

SDL Tridion is a global leader in Web Content Management (WCM) solutions. In addition to content creation, management, translation, delivery and archiving solutions, SDL Tridion provides brand management, targeted communication, multi-channel delivery and visitor interaction capabilities.

SDL Tridion enables organizations to provide a persuasive customer experience through all of their front office activities. Corporate communication, marketing and customer service can ensure that their communication connects with their key target audiences.

Unlike other WCM products, SDL Tridion's enterprise class WCM solution and unique BluePrinting technology enables organizations to deliver a consistent, interactive, and highly targeted customer experience in multiple languages and across multiple Web sites and channels.

More than 500 organizations rely on SDL Tridion solutions, including well-known global brands such as ABN AMRO, BBVA, breastcancer.org, Canon, Emirates, KLM, Lexus, Renault, Ricoh, Sanofi-Aventis, Scania, Toyota, Unilever and Yamaha. SDL Tridion has offices and partners throughout North America, Europe and Asia. For more information about SDL Tridion, please visit www.sdltridion.com

SDL Tridion is a division of SDL, the leader in global information management (GIM) solutions. For more information about SDL, please visit www.sdl.com

Contact information

E-mail: info@sdltridion.com

Web site: www.sdltridion.com

Copyright © 2007 by SDL Tridion.

SDL Tridion®, SDL Tridion R5™, BluePrinting™, SiteEdit™ and WebForms™ are trademarks of SDL Tridion or its affiliates. All other company or product names used herein may be trademarks of its respective owners.