Vendor Landscape: Enterprise Content Management for Process Workers

Stick to the process; identify key vendors for automating mission critical workflows.

INFO~TECH
research group

Introduction

There is a wide range of capability in Enterprise Content Management (ECM) for Process Worker solutions. The most advanced provide advanced options for capture, integration, and output.

This Research Is Designed For:

✓ Enterprises seeking to select a solution for ECM.

- Their ECM use case may include:
  - ○ Organizations that want to increase the efficiency of workers that engage in repetitive tasks.
  - ○ Organizations that need to improve key transactional processes such as accounts payable or onboarding.
  - ○ Organizations that must integrate their ECM strategy with other key line-of-business applications such as Enterprise Resource Planning (ERP) or Customer Relationship Management (CRM) systems.

This Research Will Help You:

✓ Understand what's new in the ECM for Process Workers market.

✓ Evaluate ECM for Process Workers vendors and products for your enterprise needs.

✓ Determine which products are most appropriate for particular use cases and scenarios.

Executive Summary

Info-Tech evaluated eleven competitors in the ECM for Process Workers market, including the following notable performers:

Champions:

- **IBM FileNet** provides extensive functional depth with a continued emphasis on analytics and process performance improvement.

- **OpenText ECM Suite** offers demonstrated technology and a compelling roadmap that fully addresses emerging trends.

- **EMC Documentum** offers rich functionality for both capture and document output.

- **Laserfiche's** industry experience and depth of channel expertise sets it apart.

Value Award:

- **Nuxeo** offers adequate ECM functionality at a compelling price point.

Innovation Award:

- **Perceptive Software** addresses the issue of integrating ECM with transactional applications in an elegant manner. It is particularly appropriate for SMEs.

Info-Tech Insight

1. **Capture is passé.**

   Getting information into an ECM system is yesterday's problem. Today's issue is how to effectively manage it once it's there. Avoid discussions about who has the best OCR technology.

2. **Roadmap is important.**

   ECM use cases chase technology. Users constantly look to consumer technology and expect similar functionality in their work tools. Support for technologies like mobility and social is crucial.

3. **Document output is making a comeback.**

   Output was once relegated to printing service bureaus. The explosion of information devices such as mobile phones and tablets has reprioritized the issue of information access and presentation.

Market Overview

How it got here

- ECM started as a series of disparate but related technologies serving specific industries. The first solutions managed paper records.
- The market was characterized by small regional vendors for specific industries. Industry mergers and acquisitions have resulted in a relatively small number of very large vendors with diverse product offerings. Local markets are served by niche products and local consultants that resell the major products.
- ECM for Process Workers addresses the most transactionally oriented aspects of ECM, including capture, records management, workflow management, and document output.
- There is considerable vendor overlap between ECM for Process Workers and ECM for Knowledge Workers. The largest vendors do both. A small subset of vendors address the specific needs of process workers.
- Cost and complexity remain key factors in determining which vendor to choose.

Where it's going

- The largest current disruptive factor to ECM is the continued growth of Microsoft SharePoint. It has ECM capability but is an incomplete solution. Specifically, it lacks effective tools for capture or records management. It has been omitted from this report, but other vendors are scrambling to provide integration options.
- The ECM market continues to be characterized by consolidation. Vendors like IBM, EMC, and OpenText continue to aggressively acquire functionality, particularly in the areas of information organization and governance, and document output.
- Mobile technology such as phones and tablets, and social functionality continue to be development priorities for all of the ECM vendors.
- The biggest hurdle for most ECM implementations isn't technology related; it's about the formulation of – and compliance with – internal policy.

Info-Tech Insight

As the market evolves, capabilities that were once cutting edge become default and new functionality becomes differentiating. Capture has become a Table Stakes capability and should no longer be used to differentiate solutions. Instead, focus on Application Integration and Integration Support to get the best fit for your requirements.

ECM for Process Workers Vendor Landscape selection/knock-out criteria: Market share and mind share

- ECM for Process Workers includes products that facilitate repetitive tasks involving disparate sources of information (including paper). Info-Tech considered vendors that have market share within the Info-Tech client base and that deliver the base functionality to meet commonly encountered use cases.

- For this Vendor Landscape, Info-Tech focused on those vendors that have a strong market presence and/or reputational presence among small to mid-sized enterprises.

Included in the Vendor Landscape:

- **Autonomy Records Management.** A leader that has extended its base technology for information discovery via extensive acquisition.

- **EMC Documentum.** The long-standing innovator that is expanding its functional footprint into new areas.

- **HP TRIM.** A small business unit in a large company that treats all documents as records.

- **Hyland Software OnBase.** A veteran that is growing through VARs and OEMs.

- **IBM FileNet.** An innovator that continues to expand its offerings via acquisition.

- **Laserfiche Rio.** A stalwart that is exploiting the new capabilities of emerging technology.

- **Nuxeo.** An innovative open-source ECM platform that appeals to smaller enterprises.

- **OpenText ECM Suite.** The deepest technology portfolio in the industry.

- **Oracle UCM.** A complete ECM stack that is integrated with the rest of the Oracle infrastructure.

- **SpringCM.** A hosted solution for complex workflow and document management.

- **Perceptive Software.** An SME solution that addresses the complexities of integration.
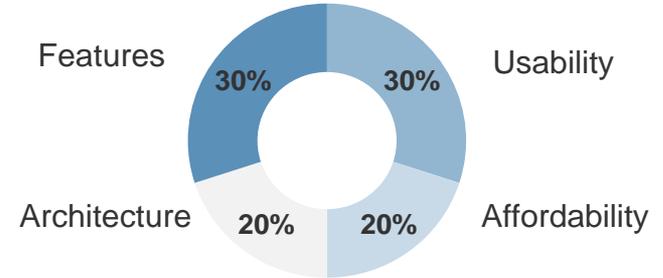
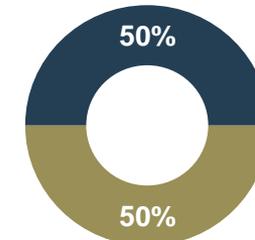# ECM for Process Workers Criteria & Weighting Factors

Product Evaluation

Features	The solution provides basic and advanced feature/functionality.
Affordability	The five year TCO of the solution is economical.
Usability	The solution's dashboard and reporting tools are intuitive and easy to use.
Architecture	The delivery method of the solution aligns with what is expected within the space.

Vendor Evaluation
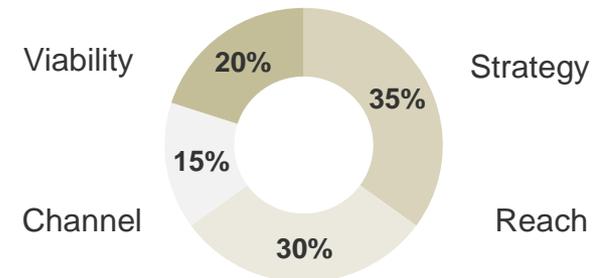
Viability	Vendor is profitable, knowledgeable, and will be around for the long-term.
Strategy	Vendor is committed to the space and has a future product and portfolio roadmap.
Reach	Vendor offers global coverage and is able to sell and provide post-sales support.
Channel	Vendor channel strategy is appropriate and the channels themselves are strong.

Features 30%
Usability 30%
Architecture 20%
Affordability 20%

Product

50%
50%

Vendor

Viability 20%
Strategy 35%
Channel 15%
Reach 30%

The Info-Tech ECM for Process Workers Vendor Landscape

Champions receive high scores for most evaluation criteria and offer excellent value. They have a strong market presence and are usually the trend setters for the industry.

Innovators have demonstrated innovative product strengths that act as their competitive advantage in appealing to niche segments of the market.

Market Pillars are established players with very strong vendor credentials, but with more average product scores.

Emerging players are newer vendors who are starting to gain a foothold in the marketplace. They balance product and vendor attributes, though score lower relative to market Champions.
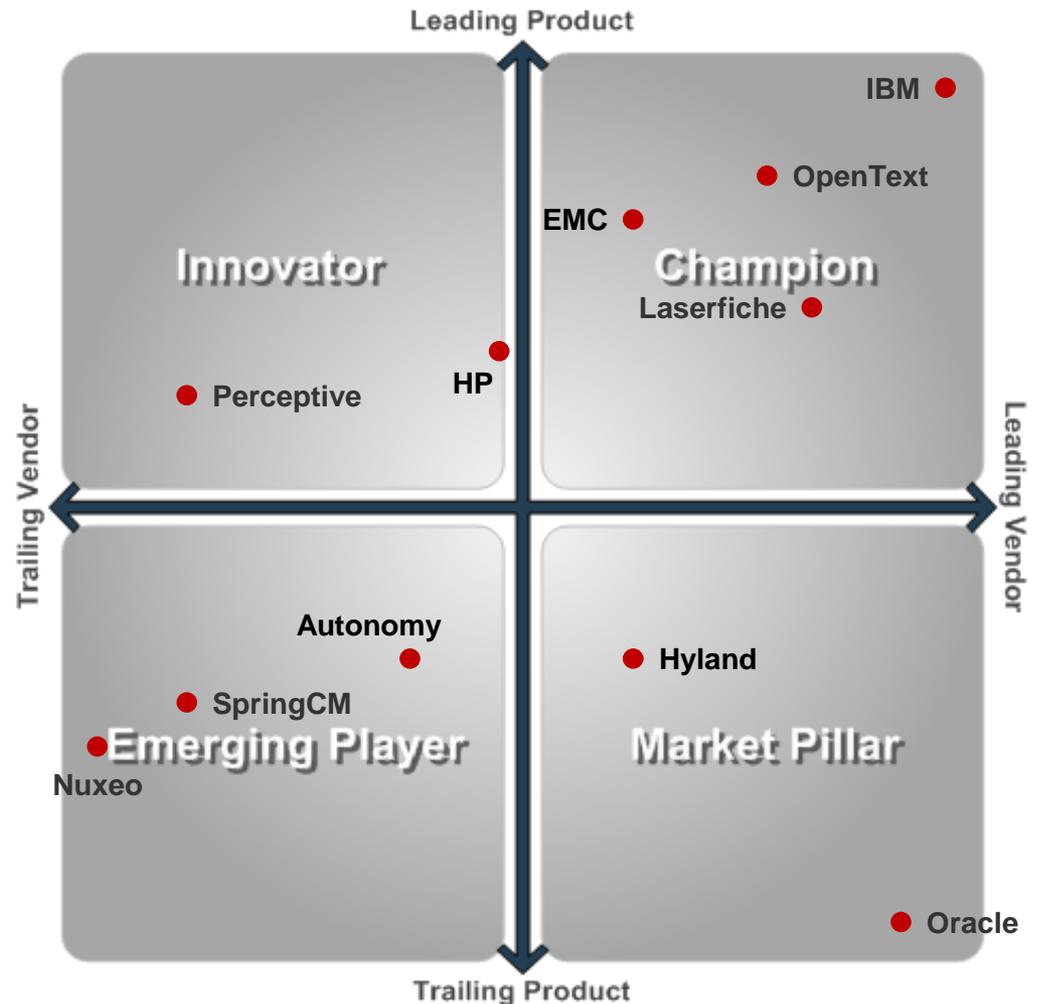
For an explanation of how the Info-Tech Vendor Landscape is created please see the slide entitled "Vendor Evaluation Methodology" in the appendices.

Every vendor has its strengths & weaknesses; Pick the one that works best for you

	Product					Vendor				
	Overall	Features	Usability	Afford-ability	Architec-ture	Overall	Viability	Strategy	Reach	Channel
Autonomy*										
EMC*										
HP										
Hyland Software*										
IBM										
Laserfiche										
Nuxeo										
Open Text*										
Oracle*										
SpringCM										
Perceptive Software										

* Pricing not provided by vendors.

**Legend:** ● =Exemplary ◑ = Good ◑ = Adequate ◔ =Inadequate ○ = Poor

Nuxeo provides the best value

What is a Value Score?

The Value Score indexes each vendor's product offering and business strength **relative to their price point**. It **does not** indicate vendor ranking.

Vendors that score high offer more **bang for the buck** (e.g. features, usability, stability, etc.) than the average vendor, while the inverse is true for those that score lower.

Price-conscious enterprises may wish to give the Value Score more consideration than those who are more focused on specific vendor/product attributes.

■ Champion
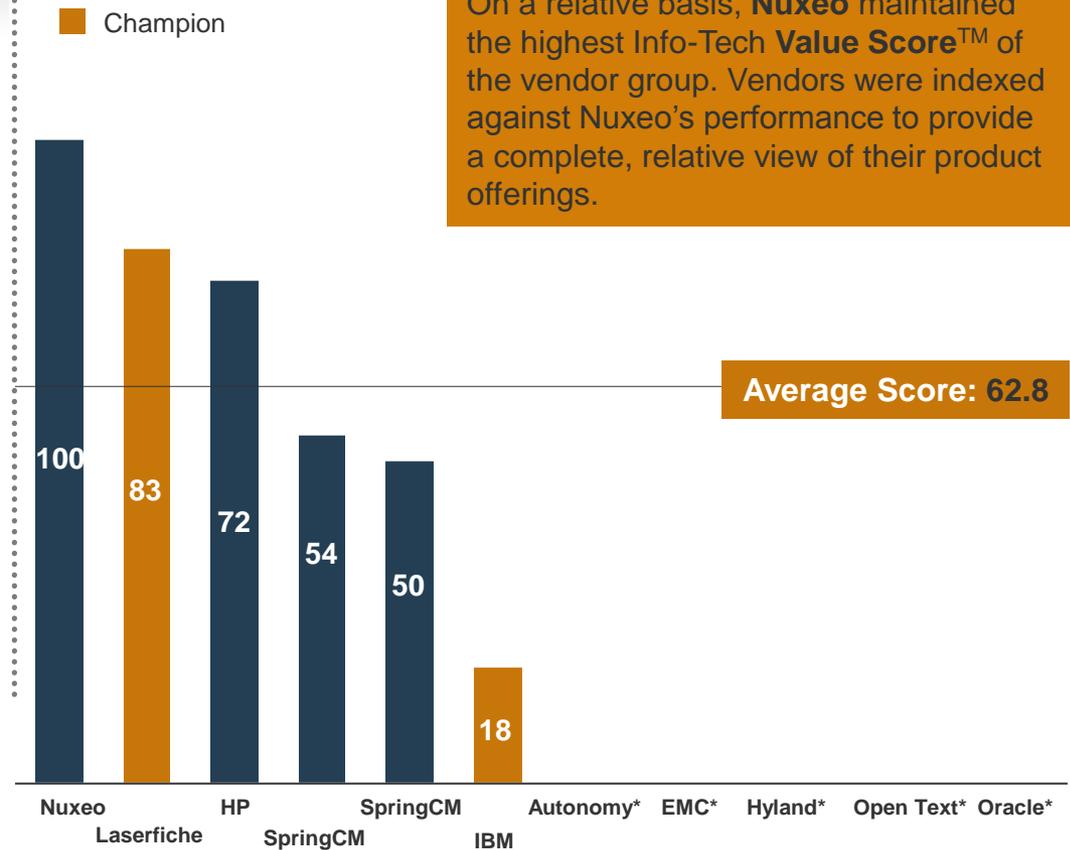
On a relative basis, **Nuxeo** maintained the highest Info-Tech **Value Score**^{TM} of the vendor group. Vendors were indexed against Nuxeo's performance to provide a complete, relative view of their product offerings.

Average Score: 62.8

Vendor	Score
Nuxeo	100
Laserfiche	83
HP	72
SpringCM	54
SpringCM	50
IBM	18
Autonomy*	
EMC*	
Hyland*	
Open Text*	
Oracle*	

* Pricing not provided by vendors.

For an explanation of how the Info-Tech Value Index is calculated please see the slide entitled "Value Index Ranking Methodology" in the appendices.

For an explanation of how normalized pricing is determined please see the slide entitled "Product Pricing Scenario & Methodology" in the appendices.

Table Stakes represent the minimum standard; without these a product doesn't even get reviewed

The Table Stakes

Feature	Description
Capture	Capture of documents from either paper sources (OCR, OMR, etc.) or from existing transactional systems (ERP, CRM, etc.).
Records Management	Support for records management (as defined by ISO 15489) including retention, disposition, lifecycle management, and adherence to file plans.
Audit Trails	Ability to monitor who has accessed specific documents and records.
Granular Access Control	Capability to limit access to specific groups of users or individuals.
Search	Tools that enable users to find relevant information based on metadata.

What Does This Mean?

The products assessed in this Vendor Landscape™ meet, at the very least, the requirements outlined as Table Stakes.

Many of the vendors go above and beyond the outlined Table Stakes, some even do so in multiple categories. This section aims to highlight the products capabilities **in excess** of the criteria listed here.

Info-Tech Insight

If Table Stakes are all you need from your ECM for Process Workers solution, the only true differentiator for the organization is price. Otherwise, dig deeper to find the best price to value for your needs.

Advanced Features are the market differentiators that make or break a product

Scoring Methodology

Info-Tech scored each vendor's features offering as a summation of their individual scores across the listed advanced features. Vendors were given one point for each feature the product inherently provided. Some categories were scored on a more granular scale with vendors receiving half points.

Advanced Features

Feature	What We Looked For
Application Integration	Support for integration with other applications (ERP, CRM, SharePoint, etc.). The focus is on enabling transactional workers to remain within their line-of-business applications.
Information Organization	Tools to improve the ability to find information via full text search or taxonomy management.
Mobile Access	Tools to enable the remote viewing of content from a tablet, mobile phone, or other mobile device.
Exception Handling	Ability to resolve exceptions from transactional processes as quickly as possible via messaging or collaboration tools.
Document Output	Generation of formatted output documents (bills, reports, statements, etc.). Support for mobile technology is particularly important.
Knowledge Worker Support	Integration of document libraries to manage check-in/check-out and version control.

# Each vendor offers a different feature set; concentrate on what you need

	Application Integration	Information Organization	Mobile Access	Exception Management	Document Output	Knowledge Worker Support
Autonomy	🟢	🟢	🟢	🟢	🟡	🟢
EMC	🟢	🟡	🟢	🟡	🟢	🟢
HP	🟡	🟡	🟡	🟡	🟡	🟢
Hyland Software	🟢	🟡	🟢	🟢	🟡	🟡
IBM FileNet	🟢	🟢	🟢	🟢	🟢	🟢
Laserfiche	🟢	🟢	🟢	🟡	🟡	🟢
Nuxeo	🔴	🟡	🟡	🟡	🟡	🟢
Open Text	🟢	🟢	🟢	🟢	🟢	🟡
Oracle	🟢	🔴	🔴	🟢	🟡	🟢
SpringCM	🟡	🟡	🟢	🟡	🟡	🟢
Perceptive Software	🟡	🟡	🟡	🟡	🔴	🟢

Legend 🟢 = Feature fully developed 🟡 = Feature partially present / pending 🔴 = Feature under developed

IBM offers a wealth of functionality and a fully developed vision for ECM

Champion

Product: FileNet Content Manager
Employees: 826,751
Headquarters: Armonk, NY
Website: www.ibm.com
Founded: 1911
Presence: NYSE: IBM
FY10 Revenue: $99.87B

$1   → $1M+

Priced between $100,000-$250,000.
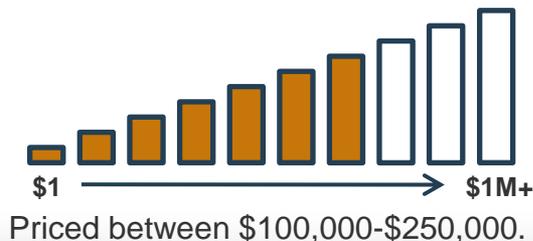
Overview
- IBM's acquisition of FileNet has sharpened its focus on ECM.
- Traditionally, IBM has been process-centric, but it has been expanding into information governance and content analytics.

Strengths
- IBM offers an incredibly broad set of functionality. There's very little that IBM can't deliver.
- IBM's solutions are particularly appropriate for large enterprises that have concerns related to content discovery, auditing, and proactive management.

Challenges
- The functional breadth of IBM's ECM offering involves complicated licensing.
- IBM is firmly focused on large enterprise, and its products may deliver more functionality than a prospect needs or is willing to pay for.

Info-Tech Recommends:

Size and complexity are the major stumbling blocks for IBM. ECM is only a small part of its product portfolio and the products are most appropriate for large enterprises.

A diverse functional footprint takes OpenText to the top

Champion

Product:	OpenText ECM Suite
Employees:	4,450
Headquarters:	Waterloo, ON
Website:	www.opentext.com
Founded:	1991
Presence:	NASDAQ: OTEX; TSX: OTC
	FY10 Revenue: $912M

OPEN TEXT
The Content Experts™

$1 ——————→ $1M+

Pricing Not Provided

Overview

- OpenText is the largest pure-play ECM vendor.
- It has grown through aggressive acquisition and developed a broad functional footprint.

Strengths

- The functional depth of OpenText's offerings is compelling for many enterprises.
- OpenText's vertical solutions for regulated industries readily address specific problems.
- Client references frequently cite OpenText as a cost-effective solution.

Challenges

- OpenText has challenges in reconciling its growing apps portfolio. It has detailed roadmaps, and prospects must review them as part of the selection process.
- OpenText offers a horizontal solution for case management, but this solution lacks the execution demonstrated by competitors.

Info-Tech Recommends:

OpenText offers an incredibly extensive application portfolio to mid-size and larger enterprises. It is still aggressively building out capabilities for BPM, SharePoint integration, and mobile.

EMC offers solid ECM capability but lacks the focus of some of its competitors

Champion

Product: Documentum ECM
Employees: 48,500
Headquarters: Hopkinton, MA
Website: www.emc.com
Founded: 1979
Presence: NYSE: EMC
FY10 Revenue: $17.015B

EMC² ®

$1 ——————————→ $1M+

Pricing Not Provided

Overview

- EMC offers a variety of ECM solutions spanning all areas of ECM. Its core offering is Documentum, a product augmented by other acquired offerings including Captiva and Document Sciences.

Strengths

- EMC can address all areas of ECM.
- EMC's offerings extend beyond the applications space to include hardware and infrastructure options.
- The support for infrastructure for Documentum is extensive and international.
- The document output capability is particularly attractive.

Challenges

- EMC's Documentum has been designed for mid to large enterprise. Smaller companies may find their value proposition unappealing.
- Content management is only a small part of EMC's business.
- Documentum lacks the advanced information organization features of some of its competitors.

Info-Tech Recommends:

EMC offers content management solutions for large enterprises that need document output capability.

Laserfiche has the base capability and channel strength to meet the ECM needs of the mid-market

Champion

Product: Laserfiche Rio, Laserfiche Avante
Employees: 250
Headquarters: Long Beach, CA
Website: www.laserfiche.com
Founded: 1976
Presence: Private

$1 → $1M+

Priced between $100,000-$250,000.
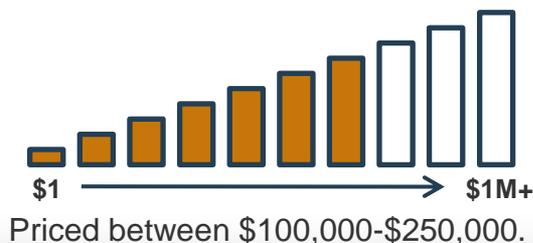
Overview

- Laserfiche has been serving process-centric SMEs for decades. It is available in two flavors: Rio for enterprise deployments, and Avante for SMEs.
- It has gained traction by offering credit for enterprises to replace their existing ECM platforms (i.e. "Cash for Clunkers").

Strengths

- Has an innovative iPhone app that allows for remote scanning using the iPhone camera. Includes OCR, and image correction technologies.
- Has an Integration Marketplace, where connectors can be purchased for a wide variety of products.
- Strong alignment with Microsoft technologies.
- Well developed channel to service mid-market demands.

Challenges

- Laserfiche lags behind competitors with respect to document output.
- It must further develop its integration with collaboration and messaging tools.

Info-Tech Recommends:

Imaging and workflow are Laserfiche strengths. It also offers innovative mobile technology. Document output functionality is lacking.

HP TRIM's great strength is its robust records management capabilities and its integration with SharePoint

Innovator

Product: HP TRIM
Employees: 324,600
Headquarters: Palo Alto, CA
Website: www.hp.com
Founded: 1939
Presence: NYSE: HPQ
FY10 Revenue: $126.033B

$1 ———————→ $1M+

Priced between $100,000-$250,000.
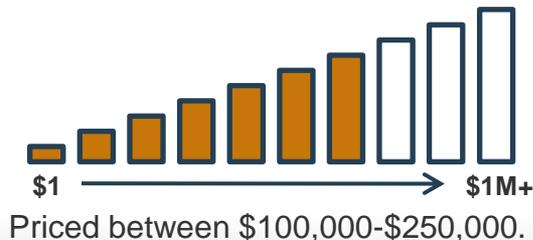
Overview

- HP TRIM arose from HP's 2008 acquisition of TOWER Software. TOWER focused on creating solutions for regulated industries such as the public sector, utilities, healthcare, banking, and finance.

Strengths

- HP TRIM features strong integration with SharePoint and other Microsoft products including Office and Outlook. This makes TRIM a compelling choice for Microsoft shops.
- It addresses most of the base requirements for process oriented ECM including records management and workflow capability.

Challenges

- TRIM is only a small part of HP's software strategy.
- HP lags in developing a mobile strategy for TRIM.
- The integration options for TRIM are limited in comparison with other platforms.
- Attaining full process worker capability may require additional software components from other vendors.

Info-Tech Recommends:

HP TRIM offers tremendous records management capabilities for enterprises of all sizes. Document output and mobility options continue to be limited.

Perceptive Software provides an effective tool to enable SMEs to integrate imaging and line-of-business applications

Innovator

Product:	Perceptive Software ECM
Employees:	600
Headquarters:	Shawnee, KS
Website:	www.perceptivesoftware.com
Founded:	1995
Presence:	Private

perceptivesoftware

$1 ——————→ $1M+

Priced between $100,000-$250,000.
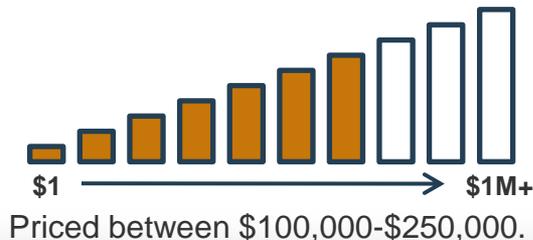
Overview

- Perceptive was acquired by Lexmark in June 2010, but it continues to operate independently.
- Its flagship product is ImageNow, a document imaging and management tool that is part of its ECM offerings.

Strengths

- Has a strong presence in the higher education market.
- Has made a deliberate decision not to acquire its technologies in order to make its product seamless.
- Handles service implementation through industry-specific in-house services teams.
- Offers a method that greatly facilitates integration with line-of-business applications.

Challenges

- Perceptive Software's primary challenges come from the relative shallowness of the offering. It's good at what it does, but lacks many of the advanced features of its competitors.
- Lack of focus on document output, including reports.

Info-Tech Recommends:

Enterprises that need to integrate imaging and line-of-business applications should consider Perceptive Software as a value solution.

Hyland Software is a leader at imaging and workflow for specific verticals

Market Pillar

Product: OnBase
Employees: 1,200
Headquarters: Westlake, OH
Website: www.hyland.com
Founded: 1991
Presence: Private

HYLAND SOFTWARE

$1 → $1M+

Pricing Not Provided

Overview

- Established in 1991, Hyland Software is a successful vendor in the mid-market ECM space. Its flagship offering OnBase provides imaging and BPM capabilities widely used in transaction and case-driven business processes.

Strengths

- OnBase has exceptional mobile support, with workflow applications for Android, BlackBerry, iPad, iPhone, and Windows phones.
- Hyland Software excels at solutions for specific industry verticals, particularly healthcare, finance, and government.
- Imaging and workflow capabilities are fully developed.

Challenges

- Hyland Software is primarily a US vendor.
- OnBase lacks a developed path for SharePoint integration.
- Hyland Software's de-emphasis of collaboration provides challenges to ongoing exception management.
- Document output is not as fully developed as with other vendors.

Info-Tech Recommends:

Enterprises that need specific solutions for their industry should look to Hyland Software. Its technology vision, however, is not as developed as that of the Champions.

Oracle offers solid functionality for Oracle shops

Market Pillar

Product: Oracle Universal Content Management

Employees: 108,429
Headquarters: Redwood Shores, CA
Website: www.oracle.com
Founded: 1977
Presence: NASDAQ: ORCL
FY10 Revenue: $26.82B

ORACLE®

$1 ——————→ $1M+

Pricing Not Provided

Overview
- Oracle's UCM is a component of Oracle's Fusion architecture.
- It includes adapters to collect unstructured information from enterprise systems such as Oracle's ERP systems, and is a natural choice for enterprises that have adopted Fusion.

Strengths
- A complete ECM platform featuring solutions for records management, document management, information rights management, and capture.
- Focus on a single technology stack offers an alternative approach to "roll up" vendors like OpenText and Autonomy.

Challenges
- Some fragmentation within Oracle's ECM solution, particularly with collaboration tools.
- Comparably weak offerings for output management and taxonomy support.
- Relatively small install base.
- ECM is becoming diminishingly important within Oracle's rapidly expanding solution footprint.

Info-Tech Recommends:
The completeness of Oracle's technology stack makes it appealing to enterprises already running Oracle ERP or JD Edwards. It lags behind competitors in terms of innovative features.

Autonomy is an Emerging Player due to its diversity of functionality

Emerging Player

Product: Records Management
Employees: 1,878
Headquarters: Cambridge, UK
Website: www.autonomy.com
Founded: 1996
Presence: LSE: AU
FY10 Revenue: $870.4M

$1 —————→ $1M+

Pricing Not Provided

Overview

- Autonomy began as a research project at Cambridge University. Its core offering is IDOL, an advanced search platform for retrieving unstructured information.

Strengths

- Autonomy is the leader in enterprise search. The IDOL platform is an incredibly powerful component of any initiative for compliance, litigation defense, or marketing automation.
- Autonomy has an impressive collection of technology. It has few weaknesses as a platform for Process Automation.
- It also has an aggressive strategy for mobile integration.

Challenges

- Autonomy's key weakness is the fragmentation of its platform. Many prospects get confused with Autonomy's often overlapping functional footprint.
- Cost is another disadvantage. Many members of the Info-Tech community won't be able to benefit from Autonomy's expansive – and expensive – EMC offering.
- The impending HP acquisition may disrupt its execution.

Info-Tech Recommends:

Autonomy offers solutions for large enterprises. The diversity of offerings makes it attractive, yet expensive.

SpringCM offers the most developed on-demand solution for process oriented ECM

Emerging Player

Product: SpringCM
Employees: Not disclosed
Headquarters: Chicago, IL
Website: www.springcm.com
Founded: 2005
Presence: Private

$1 → **$1M+**

Direct comparison not appropriate as SpringCM is an on-demand product.

Overview

- SpringCM offers a cloud-based solution for content management.
- It has been an early mover in the cloud category.
- SpringCM's primary focus is process automation.

Strengths

- SpringCM's SaaS solution is effective for enterprises that need to quickly deploy limited ECM functionality.
- Services teams work to address the most common problems: financial automation, invoice management, proposal management, sales and marketing automation, etc.
- Focused on delivering tight integration with SalesForce.com.

Challenges

- SpringCM has been an early innovator in the cloud-based ECM market, but it faces increasing threat from other vendors that are moving to the cloud. As a small company in a big market, it risks losing relevance.
- Lack of industry-specific models and an underdeveloped channel strategy compared to Hyland Software or Laserfiche.

Info-Tech Recommends:

The SaaS delivery model is attractive to many clients, but SpringCM lacks the complete functionality or market presence of its competition.

Nuxeo offers compelling functionality in an open-source package

Emerging Player

Product:	Nuxeo Enterprise Platform
Employees:	Not disclosed
Headquarters:	Cambridge, MA
Website:	www.nuxeo.com
Founded:	2000
Presence:	Private

nuxeo
Open Source ECM

$1 ———→ $1M+

Priced between $100,000-$250,000.
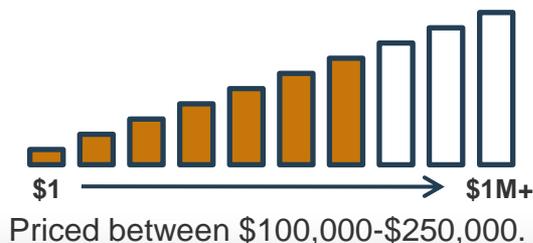
Overview

- Nuxeo EP is a multi-functional open-source ECM platform. Nuxeo's commercial installed base has traditionally been European, but it has made advances in the North American market.

Strengths

- Nuxeo has been built from the ground up with a plugin-friendly architecture to provide unmatched extensibility.
- The functional footprint is surprisingly broad, particularly for an open source solution.
- The biggest strength is acquisition cost.

Challenges

- Nuxeo is functionally limited. It includes a base module for case management but lacks most advanced features.
- Fully leveraging Nuxeo's extensibility requires development skills. Developing these skills is costly for many enterprises, particularly those that have standardized on Microsoft technologies.
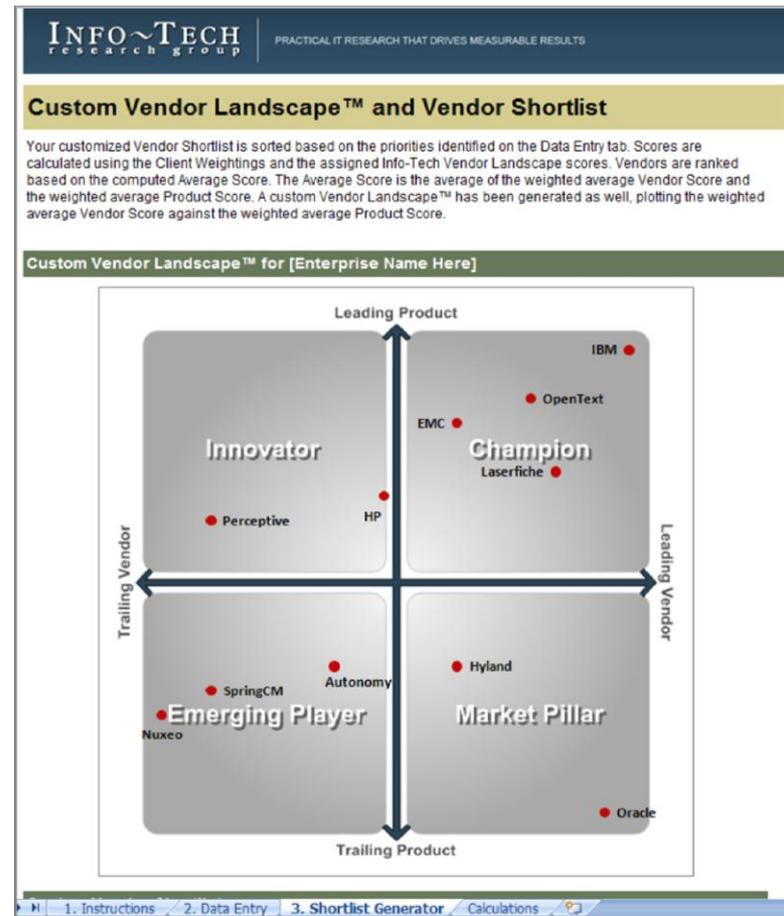
Info-Tech Recommends:

The acquisition price of the Nuxeo Enterprise Platform is attractive but it lacks most of the advanced features of ECM for Process Workers.

Identify leading candidates with the *ECM for Process Workers Vendor Shortlist Tool*

The Info-Tech *ECM for Process Workers Vendor Shortlist Tool* is designed to generate a customized shortlist of vendors based on *your* key priorities.

This tool offers the ability to modify:

- Top-level weighting of product vs. vendor criteria

- Individual product criteria weightings:
  - ✓ Features
  - ✓ Usability
  - ✓ Affordability
  - ✓ Architecture

- Individual vendor criteria weightings:
  - ✓ Viability
  - ✓ Strategy
  - ✓ Reach
  - ✓ Channel

INFO~TECH research group | PRACTICAL IT RESEARCH THAT DRIVES MEASURABLE RESULTS

Custom Vendor Landscape™ and Vendor Shortlist

Your customized Vendor Shortlist is sorted based on the priorities identified on the Data Entry tab. Scores are calculated using the Client Weightings and the assigned Info-Tech Vendor Landscape scores. Vendors are ranked based on the computed Average Score. The Average Score is the average of the weighted average Vendor Score and the weighted average Product Score. A custom Vendor Landscape™ has been generated as well, plotting the weighted average Vendor Score against the weighted average Product Score.

Custom Vendor Landscape™ for [Enterprise Name Here]

Leading Product

Innovator | Champion

• Perceptive HP | • IBM • OpenText EMC • Laserfiche •

Trailing Vendor | *Leading Vendor*

• SpringCM Autonomy • | • Hyland
Nuxeo • Emerging Player | Market Pillar • Oracle

Trailing Product

1. Instructions | 2. Data Entry | 3. Shortlist Generator | Calculations

Hyland Software, Laserfiche, and HP offer catered industry solutions to the public sector

Success is often about a solution to particular industry problems rather than just the breadth of the technology platform.

1 Industry Specialization

2 Document Output

3 Enterprise Size

Financial Services

HYLAND SOFTWARE

Laserfiche®

Public Sector

HYLAND SOFTWARE

Laserfiche®

OPEN TEXT
The Content Experts™

perceptivesoftware

EMC²

Generalists

Autonomy

IBM

SpringCM

nuxeo
Open Source ECM

hp

ORACLE®

Oracle and EMC excel at document output; OpenText's emphasis on mobile is notable

Output has changed with an increased focus on support for mobile devices and tablets.

Exemplary Performers

1 Industry Specialization

EMC²   ORACLE

OPEN TEXT
The Content Experts™

Viable Performers

2 **Document Output**

IBM   HYLAND SOFTWARE

hp

3 Enterprise Size

Adequate Performers

Autonomy   perceptive software

SpringCM   nuxeo Open Source ECM   Laserfiche

Perceptive Software excels at integration for SMEs, and Nuxeo yields attractive cost advantages

SMEs are constrained by both budget and complexity. Easy line-of-business integration is particularly important.

1 Industry Specialization

2 Document Output

3 **Enterprise Size**

Small Enterprise

perceptivesoftware

nuxeo
Open Source ECM

Large Enterprise

Niche Applications

Laserfiche

SpringCM

HYLAND SOFTWARE

Appendix

1. Vendor Evaluation Methodology
2. Value Index Ranking Methodology
3. Product Pricing Scenario & Methodology

Vendor Evaluation Methodology

Info-Tech Research Group's Vendor Landscape market evaluations are a part of a larger program of vendor evaluations, which includes Solution Sets that provide both Vendor Landscapes and broader Selection Advice.

From the domain experience of our analysts, as well as through consultation with our clients, a vendor/product shortlist is established. Product briefings are requested from each of these vendors, asking for information on the company, products, technology, customers, partners, sales models and pricing.

Our analysts then score each vendor and product across a variety of categories, on a scale of 0-10 points. The raw scores for each vendor are then normalized to the other vendors' scores to provide a sufficient degree of separation for a meaningful comparison. These scores are then weighted according to weighting factors that our analysts believe represent the weight that an average client should apply to each criteria. The weighted scores are then averaged for each of two high level categories: vendor score and product score. A plot of these two resulting scores is generated to place vendors in one of four categories: Champion, Innovator, Market Pillar, and Emerging Player.

For a more granular category by category comparison, analysts convert the individual scores (absolute, non-normalized) for each vendor/product in each evaluated category to a scale of zero to four whereby exceptional performance receives a score of four and poor performance receives a score of zero. These scores are represented with "Harvey Balls", ranging from an open circle for a score of zero to a filled in circle for a score of four. Harvey Ball scores are indicative of absolute performance by category but are not an exact correlation to overall performance.

Individual scorecards are then sent to the vendors for factual review, and to ensure no information is under embargo. We will make corrections where factual errors exist (e.g. pricing, features, technical specifications). We will consider suggestions concerning benefits, functional quality, value, etc; however, these suggestions must be validated by feedback from our customers. We do not accept changes that are not corroborated by actual client experience or wording changes that are purely part of a vendor's market messaging or positioning. Any resulting changes to final scores are then made as needed, before publishing the results to Info-Tech clients.

Vendor Landscapes are refreshed every 12 to 24 months, depending upon the dynamics of each individual market.

Value Index Ranking Methodology

Info-Tech Research Group's Value Index is part of a larger program of vendor evaluations which includes Solution Sets that provide both Vendor Landscapes and broader Selection Advice.

The Value Index is an indexed ranking of value per dollar as determined by the raw scores given to each vendor by analysts. To perform the calculation, Affordability is removed from the Product score and the entire Product category is reweighted to represent the same proportions. The Product and Vendor scores are then summed, and multiplied by the Affordability raw score to come up with Value Score. Vendors are then indexed to the highest performing vendor by dividing their score into that of the highest scorer, resulting in an indexed ranking with a top score of 100 assigned to the leading vendor.

The Value Index calculation is then repeated on the raw score of each category against Affordability, creating a series of indexes for Features, Usability, Viability, Strategy, and Support, with each being indexed against the highest score in that category. The results for each vendor are displayed in tandem with the average score in each category to provide an idea of over and under performance.

The Value Index, where applicable, is refreshed every 12 to 24 months, depending upon the dynamics of each individual market.

Product Pricing Scenario & Methodology

Info-Tech Research Group provided each vendor with a common pricing scenario to enable normalized scoring of Affordability, calculation of Value Index rankings, and identification of the appropriate solution pricing tier as displayed on each vendor scorecard.

Vendors were asked to provide *estimated* costs for ECM software licensing to address the needs of a reference organization described in the pricing scenario.

Additional consulting, deployment, and training services were explicitly out of scope of the pricing request, as was the cost of *enhanced* support options, though vendors were encouraged to highlight any such items included with the base product acquisition. The annual software/hardware maintenance rate was also requested, along with clarity on whether or not the first year of maintenance was included in the quoted appliance/software costs, allowing a three-year total acquisition cost to be calculated for each vendor's ECM solution. This three-year total acquisition cost is the basis of the solution pricing tier indicated for each vendor.

Finally, the vendors' three-year total acquisition costs were normalized to produce the Affordability raw scores and calculate Value Index ratings for each solution.

Key elements of the common pricing scenario provided to ECM vendors included:

- A three-site professional services organization with 2200 employees located at a US head office facility, a second US satellite office, and a European satellite office. IT functions are located primarily at the US head office, with a small proportion of IT staff and systems located at the European site, which also acts as a DR facility.

- The firm is interested in improving the efficiency of its 200 transactional workers working primarily in the accounting and customer service departments.

- The solution is expected to improve the overall efficiency of the workers and to facilitate the overall records management process within the enterprise.