Content Services Strategy: An Enterprise View of Content-Centric Markets and Applications

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Initiatives: Digital Workplace Strategy

Enterprisewide content strategy remains an elusive goal. Application leaders responsible for digital workplace, customer experience and information governance must understand content-centric markets to steer their content services strategy. This research helps them identify key vendors and solutions.

Strategic Planning Assumptions

By 2022, 20% of organizations will deploy content services evolved from a content collaboration platform (CCP) for digital business requirements rather than a content services platform (CSP).

By 2022, 30% of enterprises will consolidate their traditional enterprise content management provider in favor of a content services platform that works across content silos.

By 2023, over 75% of all customer communications management implementations will be cloud or hybrid solutions.

By 2022, more than 60% of organizations will use AI-driven metadata tagging, boosting digital dexterity through improved delivery of insight.

Analysis

The markets for content-centric platforms and applications are highly fragmented. Despite recent consolidation by vendors, organizations must select and integrate multiple products in order to deliver complete solutions. Content-centric tools help capture, manage and deliver unstructured information for a wide variety of employee, customer, governance and domain-specific use cases. However, a plurality of content systems means that organizations must integrate multiple silos or suffer from friction caused by working across multiple systems. With little appetite from vendors to provide enterprisewide content services that cover a broad range of use cases, content services remain siloed and application leaders should plan with this in mind.

A strategic approach that considers the business needs and capabilities of content-centric systems is required to help organizations plan a roadmap for these services. One option is to use Gartner’s ACME model — based on the principles of activity, context, motivation and enabling technology — to define
content services in terms of their foundational, domain and situational characteristics (see Apply Gartner’s ACME Framework to Make New Work Nucleus Technology Decisions).

This research roundup builds on Gartner's unique perspective on content-centric markets to redefine content strategy in terms of employee-, customer-, governance- and domain-centric needs, as shown in Figure 1.

**Figure 1. Content Services Categories in the Enterprise**

Each of these categories can be characterized by a set of challenges that cut across markets, vendors and products.

- **Employee**: Virtual and hybrid teams are driving adoption of digital workplace technologies and use of Microsoft 365 (M365) has reached a turning point in many organizations. The personal and team productivity suite — which Gartner calls the “new work hub” (see Digital Workplace Applications Primer for 2021) — where employees can collaborate remotely on content is a priority for IT application leaders.

- **Customer**: Customer service and marketing leaders need to deliver consistent customer experiences with content spread across print, web, mobile, voice, video and messaging channels. Customers increasingly expect to access personalized content through any/all channels. Content is the
cornerstone of these interactions — whether it is delivered via a website, a mobile device, a chat bot or through postal services.

- Governance: Content growth leads to challenges for infrastructure and operations leaders who need to optimize cost for content services, without exposing organizations to regulatory and litigation risks with content. At the same time, legal and compliance teams need access to a wide range of corporate content for e-discovery purposes.

- Domain: Business leaders deploy point solutions for finance, human resources, sales and marketing for which content is a key component. Domain-specific solutions all too often fail to integrate content with corporate systems and governance practices, creating silos of information.

A failure to address content challenges means that organizations struggle to make employees and customers productive by giving them the information they need, when they need it. Developing a content strategy means knowing what information you have and where it is stored in order to create consistent employee and customer experiences where content is appropriately governed.

Research Highlights

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Gartner’s research on content-centric systems is spread over five different Magic Quadrants and eight Market Guides, with vendors from one Magic Quadrant or Market Guide rarely appearing in another. While the market for content services remains fragmented, and will be for the foreseeable future, correlating Gartner research with guidance on the content services for a specific business activity or need is only possible through analyst inquiry.

This research roundup is designed to help applications and software engineering leaders navigate the wide range of research available from Gartner grouped into the four categories of employee-centric content, customer-centric content, governance centric content and domain-centric content.

Two pieces of Gartner research bring together at least two categories and provide useful perspective.

- **Success in the Digital Experience Economy Requires Connecting MX, UX, CX and EX** brings together employee and customer experience, as well as user experience and multiexperience. It introduces total experience as a way of thinking about the seamless interaction required between the customer and employee domain, with content being a focus.

- **Reinventing ECM: Introducing Content Services Platforms and Applications** recasts how we think about content services and retires the term “enterprise content management.” This research helps application leaders rethink their approach in terms of content service platforms, components and applications.
The remaining research is grouped into employee-, customer-, governance- and domain-centric research. Figure 1 above shows the categories and their antecedents. Figure 2 provides a brief description of each. The remainder of this roundup groups research according to these categories.

### Content-Centric Markets and Applications

<table>
<thead>
<tr>
<th>Employee Centric</th>
<th>Customer Centric</th>
<th>Governance Centric</th>
<th>Domain Centric</th>
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<tbody>
<tr>
<td>Employee-centric content services provide technology for improving employee productivity integrated with digital workplace technologies and office productivity suites.</td>
<td>Customer-centric content services are used to deliver customer experiences focused on consumer needs, across traditional and digital channels.</td>
<td>Governance-centric systems provide services that can be used to offload information from operational systems to either reduce cost or improve legal e-discovery.</td>
<td>Domain-centric content services are industry and function specific applications. They may use a horizontal content service platform or other content services, but may also be independent of these.</td>
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<td>Content services platforms (CSP) focus on capture, content management, content security, information governance, search and workflow.</td>
<td>Digital experience platforms (DXPs) focus on customer-centric digital portals, customer journeys and analytics.</td>
<td>Enterprise information archiving (EIA) focuses on email and file systems.</td>
<td>Contracts life cycle management (CLM) focuses on workflow for managing legal contracts.</td>
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<td>Content collaboration platforms (CCPs) focus on collaboration and productivity.</td>
<td>Customer communications management (CCM) focuses on transactional and marketing communication using print and digital media.</td>
<td>Structured data archiving (SDA) focuses on operational data archiving and legacy systems decommissioning.</td>
<td>Procure-to-pay (P2P) suites automate workflows to request, procure, receive and pay for goods and services.</td>
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<td>Intranet portal solutions (IPs) focus on publishing content for employees.</td>
<td>Web content management (WCM) focuses on web publishing and asset management.</td>
<td>E-discovery focuses on digital discovery and provides for administration of legal matters.</td>
<td>Regulatory information management (RIM) manages workflows for the regulatory approval and maintenance of a life science product.</td>
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It is important to note that these categories are not mutually exclusive and that vendors and products in one category naturally cross into others. For instance, as well as supporting employee-centric processes, content-service platforms support consumer web portals. As well as supporting customer journeys, digital experience platforms provide intranets for delivering employee experience. As well as supporting self-service portals, a customer communications management system is an important governance-centric system for archiving and records management. As well as supporting records managers and legal teams, e-discovery solutions provide enterprise search capabilities to employees.

These categories are not hard boundaries between markets, vendors and applications. They are a top view of multiple connected markets, vendors and applications that should be considered collectively as part of a content strategy.

**Employee-Centric Content**

Employee-centric content services provide technology for improving employee collaboration and are integrated with digital workplace technologies and office productivity suites. Employee content services
include content services platforms (CSPs), which focus on content management, content security, information governance, search, productivity and workflow. They also include content collaboration tools (CCTs), which focus on collaboration and productivity. Intranet packaged solutions are internal to an enterprise and focus on the same methodology and techniques as the internet. In addition, human capital management (HCM) solutions are increasingly taking control of employee content central to their purpose.

CSPs have evolved from enterprise content management (ECM) systems. CCTs have evolved from enterprise file sync and share (EFFS) services.

The characteristics of these systems are that the content is relatively active, often processed or authored by humans and relatively low in volume.

- **Magic Quadrant for Content Service Platforms** evaluates vendors in the CSP market and helps application leaders navigate the vendor landscape and select vendors appropriate to their needs. The vendors included in this 2020 Magic Quadrant are Alfresco, AODocs, Axway, Box, DocuWare, Hyland, IBM, iManage, Kyocera Document Solutions, Laserfiche, Microsoft, M-Files, NetDocuments, Newgen, Nuxeo, OpenText, Objective and SER Group.

- **Market Guide for Content Collaboration Tools** looks at the tools employees use to create, collaborate on and manage content, and are essential for remote working and content-centric use cases. The vendors included in this Market Guide are AISHU, Axway, Box, Citrix, Dropbox, Egnyte, Google, Hyland, Inpsire-Tech, Lenovo, Microsoft, ownCloud, SER Group, Thomson Reuters and Tresorit.

- **Market Guide for Cloud Office Migration Tools** considers the challenge of cloud office adoption and helps application leaders select a migration tool to aid the transition and transformation to a digital workplace. The vendors included in this Market Guide are AvePoint, BCC, Binary Tree by Quest, BitTitan, Cloud FastPath, CloudM, CodeTwo, Microsoft, Proventeq, Quadrotech by Quest, Quest, ShareGate, Simflofy, SkyKick, SkySync and Xillio.

- **Market Guide for Intranet Packaged Solutions** — Intranet packaged solutions are defined as a collection of intranet services, built to deliver an out-of-the-box intranet experience, typically deployed in conjunction with a cloud office and which may also be the genesis of a platform for the digital workplace. The vendors included in this Market Guide are Acuvate, Akumina, Axero, Beezy, Bridgeline Digital, Habanero Consulting Group, Igloo Software, Interact, Jostle, LiveTiles, LumApps, MangoApps, Passageways, Powell Software, Simpplr, SocialChrous, Staffbase, ThoughtFarmer, Unily and Workplace from Facebook.

- **Market Guide for Enterprise Video Content Management** — As a complement to meeting solutions, video content management allows organizations to manage on-demand access to videos and deliver live meetings at scale to all employees. Application leaders can use this research to understand the market and inform selection.

- **Solution Criteria for Content Services Platforms** is designed to help application technical professionals differentiate between vendor products and select the best solution for their needs.
Customer-Centric Content

Customer-centric content services are used to deliver customer experiences focused on consumer needs, across traditional and digital channels. Customer-centric content services include digital experience platforms (DXPs) focused on composition, management, delivery and optimization of digital experiences across multiple channels and touchpoints in the customer journey. Customer communications management (CCM) focuses on marketing and transactional customer communications for both print and digital media. Web content management (WCM) focuses on web publishing and digital asset management. In addition, salesforce automation and service management categories are increasingly managing content central to their purpose.

DXPs have evolved from web content management (WCM) and horizontal portals. CCM has evolved from document generation and enterprise output management (EOM).

The characteristics of these systems are that, in general, content is relatively static, processed or authored by systems and, in the case of customer communications, is relatively high in volume. Content in customer-centric systems is also more likely to be highly regulated.

- **Magic Quadrant for Digital Experience Platforms** — Customers’ growing expectations for digital experiences make DXP adoption an urgent necessity for global organizations, but the market is fragmented and still evolving. This Magic Quadrant helps application leaders responsible for digital experiences identify vendors suited to their needs. The vendors evaluated are Acquia, Adobe, Bloomreach, CoreMedia, Crownpeak, e-Spirit, Episerver (Optimizely), HCL Software, Kentico, Liferay, Magnolia, OpenText, Oracle, Salesforce, Sitecore and Squiz.

- **Market Guide for Web Content Management** — The WCM market is mature and increasingly commoditized, and application leaders are under pressure to rationalize and modernize their WCM platforms to support digital business. While Gartner retired the Magic Quadrant for WCM following its last publication in 2019, this Market Guide defines key market dynamics and vendors central to optimizing investment strategies. The guide covers a list of 40 vendors.

- **Market Guide for Customer Communications Management** — Customer communication management (CCM) tools are using AI and cloud deployment options to improve customer experience. Application leaders should use this Market Guide to inform their choice of CCM applications. Vendors included in the research are Adobe, CEDAR CX Technologies, Doxee, Fidelity Information Systems (FIS), Hyland, Intense Technologies, ISIS Papyrus Group, Messagepoint, OpenText, Oracle, Pitney Bowes, Quadient (formerly Neopost), Sefas, Smart Communications (Intelledox), and XMPie.

- **2020 Strategic Roadmap for Web Content Management** — Approaches to planning and deploying WCM require an urgent recalibration. This research helps application leaders capture company objectives for digital transformation, examine the new role of WCM in this context and apply Gartner’s Strategic Roadmap to ensure both are aligned.

- **Adopt a Composable DXP Strategy to Future-Proof Your Tech Stack** — Instead of deploying monolithic applications, DXP can be broken down or decomposed into a set of packaged business capabilities.
This research helps application leaders responsible for transforming their existing digital stacks into a composable DXP.

**Governance-Centric Content**

Governance-centric systems provide services that can be used to offload information from operational systems to either increase operational efficiency or improve legal e-discovery. Governance-centric systems include enterprise information archiving (EIA) focused on email and file systems; structured data archiving (SDA) focused on operational data archiving and legacy systems decommissioning; and e-discovery focused on facilitating digital discovery of legal matters.

Gartner discontinued the Magic Quadrant for email active archiving and replaced it with the Magic Quadrant for enterprise information archiving (EIA) in 2010, in recognition of the wider set of content types supported by these solutions.

The characteristics of these systems are that content is relatively static, may have been authored by either systems or humans and is relatively high in volume, but not as high as customer-centric content systems.

- **Magic Quadrant for Enterprise Information Archiving** — EIA solutions archive an expanding list of data types and sources to manage corporate and regulatory compliance requirements, and e-discovery use cases. This research helps infrastructure and operations (I&O) leaders assess vendors’ ability to address current and future data-archiving requirements. Vendors included in the research are Archive360, Barracuda, Everteam, Global Relay, Micro Focus, Microsoft, Mimecast, Proofpoint, Smarsh, Veritas and ZL Tech.

- **Market Guide for Structured Data Archiving and Application Retirement** — As organizations modernize their applications and related infrastructure, the demand for structured data archiving solutions is surging. To reduce technical debt and manage legacy data when adopting new applications, I&O leaders must select and implement SDA solutions or build DIY strategies. Vendors included in the research are Archive360, CEPTES, Data Migration International Group, DataNovation, Datavard, DC Software, Everteam (a Kyocera company), Formpipe, IBM, Informatica, Micro Focus, Odaseva, OpenText, OwnBackup, PBS Software, SAP and Solix Technologies.

- **Market Guide for E-Discovery Solutions** — E-discovery solutions focus on digital discovery and administration of legal matters. I&O leaders can use this guide to help choose an e-discovery solution for their needs. Software vendors included in this research are Breakwater, Casepoint, CloudNine, Everlaw, Exterro, Ipro, Knovos, Logikcull, Microsoft, Nuix, OpenText, Relativity, Reveal, Thomson Reuters, Veritas Technologies, X1 Discovery, Zapproved and Zylab. Service providers included in this research are Ankura, Compliance, Conduent, Consilio, Deloitte, Driven, Epiq, EY, FRONTEO, FTI Consulting, HaystackID, Integreon, KPMG, KLDiscovery, Lighthouse, Modus, PwC, Ricoh and UnitedLex.
Domain-Centric Content

Domain-centric content services are industry- and function-specific applications that provide a solution to a content-centric business problem. They may use a horizontal CSP or other content services, but are also independent of these. Included in Gartner’s definition of content service applications (CSAs) are contract life cycle management (CLM), procure-to-pay (P2P) and life sciences regulatory information management (RIM) applications.

CSAs have evolved from content-enabled vertical applications (CEVA).

The characteristics of these systems are that content is active, generally processed or authored by humans, uses complex workflows and is relatively low in volume compared with customer-centric and governance-centric systems.

- **Magic Quadrant for Contract Life Cycle Management** — CLM appeals to companies of all sizes in all industries that need to manage a portfolio of content associated with contracts. This Magic Quadrant helps corporate legal and compliance technology leaders, and procurement and strategic sourcing application leaders, assess vendors’ ability to address CLM needs. Vendors included in this report are Agiloft, Apttus, CobbleStone Software, Conga, Coupa (Exari), DocSign (SpringCM), GEP, Icertis, JAGGAER, SAP Ariba, SirionLabs and Zycus.

- **Magic Quadrant for Procure-to-Pay Suites** — P2P suites automate workflows to request, procure, receive and pay for goods and services across an enterprise and leverage content extensively. This Magic Quadrant helps procurement and strategic sourcing application leaders identify vendors in this market. The vendors included are Basware, Coupa, Esker, GEP, Ivalua, JAGGAER, Medius (Wax Digital), Mercado Eletrônico, Oracle, Proactis, SAP, Synertrade, Tradeshift and Zycus.

- **Market Guide for Life Science Regulatory Information Management Solutions** — Life science companies need RIM capabilities to manage the regulatory approval and maintenance of a life science product for commercial use. Life science CIOs seeking to implement tightly integrated digital platform solutions in regulatory should use this research to inform their next-generation tool decisions. Vendors included in this Market Guide are: AmpleLogic, Amplexor, Appian, ArisGlobal, arivis, Aurea, Birlasoft, Certara, DDi, DXC Technology, Ennov, EXTEDO, Freyr, Generis, Glems, GlobalVision, i4i, Instem, Intagras, IQVIA, Kalypso (Rockwell Automation), LORENZ, MasterControl, Plexglobal.
Acronym Key and Glossary Terms

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
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<tbody>
<tr>
<td>CCM</td>
<td>customer communications management</td>
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<tr>
<td>CCT</td>
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<tr>
<td>CLM</td>
<td>contract life cycle management</td>
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<td>CSA</td>
<td>content services application</td>
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<tr>
<td>CSC</td>
<td>content services component</td>
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<td>CSP</td>
<td>content services platform</td>
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<td>CX</td>
<td>customer experience</td>
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<td>DM</td>
<td>document management</td>
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<td>DAM</td>
<td>digital asset management</td>
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<td>DXP</td>
<td>digital experience platform</td>
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<td>EIA</td>
<td>enterprise information archiving</td>
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<td>EX</td>
<td>employee experience</td>
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<td>IM</td>
<td>information management</td>
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<td>MX</td>
<td>multiexperience</td>
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<td>SDA</td>
<td>structure data archiving</td>
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<td>UX</td>
<td>user experience</td>
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<tr>
<td>WCM</td>
<td>web content management</td>
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Note 1: Characteristics of Enterprise Content

The characteristics of the four categories of content — employee, customer, governance and domain — are defined by Gartner as follows:

- **Volume** — The number of individually indexed content items with a content service platform.
- **Mutability** — Whether content is static or subject to change (i.e., dynamic).
- **Collaborativity** — The degree to which content is subject to collaborative content workflows.
- **Process** — The degree to which content is subject to substantive content workflows.
- **Longevity** — The degree to which content needs to be kept over long periods of time.
- **Formality** — The degree to which content is a formal corporate record or, conversely, is part of a transient business activity.

**Figure 3. Characteristics of Enterprise Content**

**Characteristics of Enterprise Content**

![Characteristics of Enterprise Content Diagram](image-url)

Source: Gartner
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**Recommended by the Author**

Can AWS or Azure Be Your Next Content Services Platform?

Reinventing ECM: Introducing Content Services Platforms and Applications

Summary Translation: Transcend Omnichannel Thinking and Embrace Multiexperience for Improved Customer Experience

Success in the Digital Experience Economy Requires Connecting MX, UX, CX and EX

Customer Communications Management Sees Major Shift to the Digital Customer Experience

Strategic Life Science Regulatory Information Management: From Fragmented to Holistic