

Back To The Future

European CMS Market update

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Agenda

- Introduction to Squiz UK
- WCMS industry has hit a critical point
- Why now? Where's it going?
- What is Squiz doing about it in Europe?
- What's the competition doing?
- What does all of this mean for MySource Matrix users?

Introduction to Squiz UK + Europe

- Founded in 2003
- 50 full time staff spread across offices in London, Edinburgh and Szczecin
- 120 clients in the UK, Poland and Scandinavia
- Clients base is a little different to Oz
 - 30% publishers
 - 30% corporate
 - 20% Higher Education
 - 10% Not for profit
 - 10% Government
- Follow @squizuk for updates

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WCMS update

- Market worth \$860 million
- 50 mergers and acquisitions since 2002
- Growing slowly despite the deep recession
- Very few 'greenfields' opportunities
- Hitting a tipping point. Why?
 - WCM is finally being integrated fully into Enterprise infrastructure
 - Technological advancements give Marketing / Business more involvement and control

Torn in two directions

- WCMS has a place in its own right but this market is shrinking
- Vendors are pushing in two different directions for growth:
 - True Enterprise Content Management (ECM)
 - Online Marketing Suites (OMS)

Why is this happening now?

- Recession
- Gartner 'WCMS projects must provide ROI within 6 months'
- Only two ways to do this
 - Business Process Management
 - Revenue generation

Flexibility of OS model means Squiz can pursue both

- ECM style projects our traditional strength
 - Emap
 - RCN
- Marketing is a new challenge
 - eConsultancy CMS buyers guide for Marketers put MySource Matrix in the top 3
- Service model facilitates, adoption and usage to meet business goals rather than license revenue
- Adjacent technologies don't need to be acquired – analytics, A/B and MVT, CRM, Marketing tools, etc

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A/B and MVT

- As Marketing / Business takes more interest in WCM, we're being driven towards delivering direct marketing functionality
- A/B testing is easy to learn but takes time to master
- MVT requires a massive design investment but delivers above average returns
- With MySource Matrix it's a lot easier but wait until you see contexts...

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The importance of search

- CMS and Search vendors merging or partnering
- Same situation as Content Management
 - Marketers focused on SEO and ignored their own site search
- CMS + Enterprise Search = increased ROI

What's the competition doing?

- Fighting hard...
- Average number of responses to an OJEU WCMS tender increased to 150
- 3 main areas
 - Commercially supported Open Source
 - High end ECM
 - New, lighter technology at the low end
- And one that needs to be dealt with on its own...

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Sharepoint

- Earns Microsoft over \$1 billion a year
- Sharepoint 2010 is a significant step forward
 - provides excellent social software, document management and business intelligence
- MS still hasn't bothered with WCM....
- Integration, integration, integration

'Regarding the WCM aspects, Microsoft has gained more customers who are using the WCM capabilities of MOSS for websites, but Gartner still has not seen Microsoft make significant enhancements to the WCM functionality.' Gartner, 2009.

What does this mean for MySource Matrix users?

- You have a unique opportunity
- Step back and consider
 - Your organisations objectives
 - Which MySource Matrix based projects can help you meet them?
 - Online service delivery?
 - Search?
 - Comms / Marketing?
 - How will you define and measure the ROI?

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