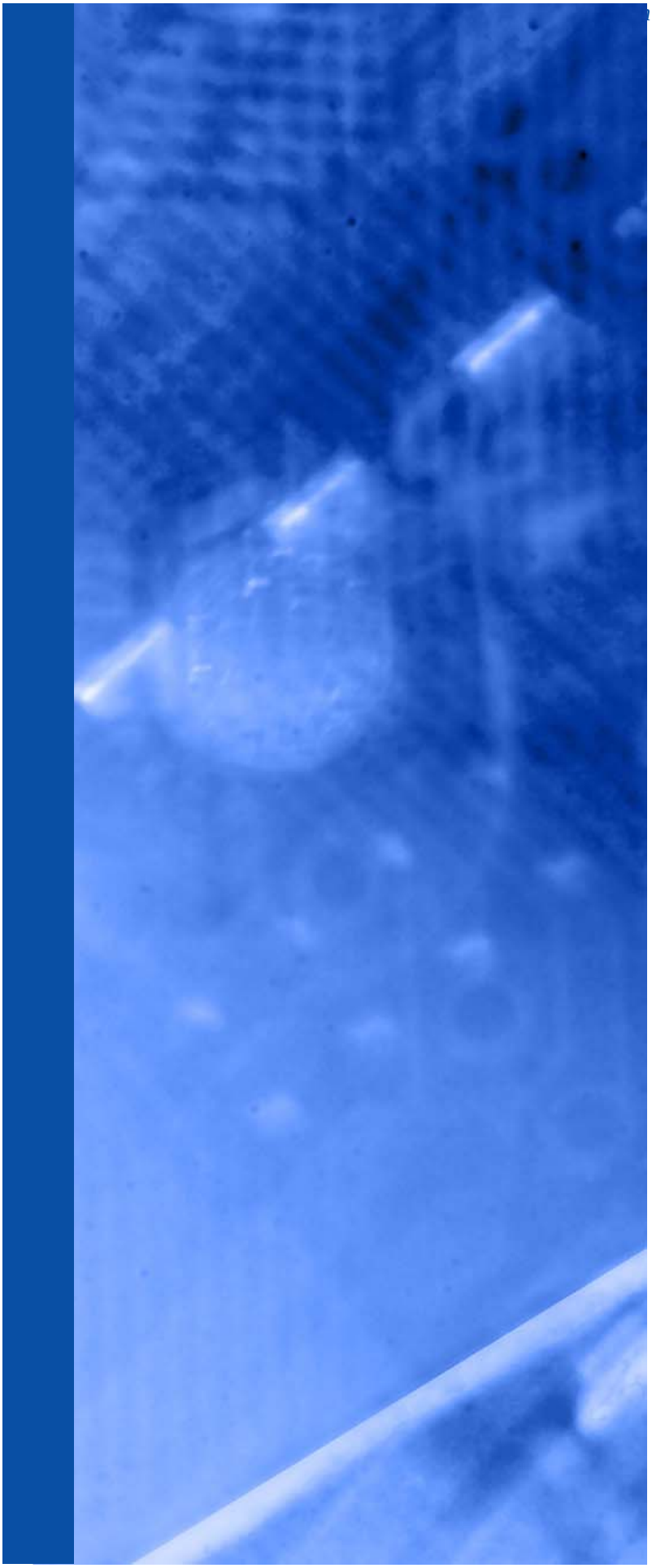

White Paper

Web Content Management, Portal, Collaboration:

Three Names, One Solution

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Executive Summary

Companies often approach the problem of getting the right information to and from the right people at the right time without thoroughly considering the entirety of what needs to be communicated or how it should be delivered. As related to internal and external Web technologies, resolving this problem requires the delivery of timely, relevant, and compelling information through Web content management solutions, the targeting of information to specific content consumers through portal applications, and the inclusion of feedback in multi-directional information exchanges through collaboration technologies. Addressing the issue holistically requires each of the three components: WCM, portal, and collaboration.

WCM provides the ability for the enterprise to present its best face to the world without knowing anything about who's looking. Portal refines this into a presentation based on what is known or what is learned about the observer. Finally, collaboration incorporates observers' feedback into a process that changes the process itself. Ultimately, without WCM, there is no online brand. Without portal, there is no targeting. Without collaboration, there is no improvement.

Introduction

Consider the multinational law firm that needs to improve the quality of its Web presence, reduce the complexity of creating and maintaining content for its internal and external Web sites, target specific content to individual employees, incorporate multimedia content from guest contributors and business partners into its Web site, and integrate the "overall solution" with an existing enterprise CRM application.

Next, think about the healthcare and medical research organization that wants to parlay the influence and prestige of its internationally-acclaimed academic publications to its online brand, target highly relevant articles to specific physicians and special interest groups, and elicit feedback from patients both on the usefulness of its Web content and the usabilty of the Web site itself.

Finally, contemplate the municipal tourism board that hopes to launch a profitable, travel-related Web portal that will attract business and leisure travelers by providing high-quality, interactive, informational resources linked to the retail and service Web sites of local and regional merchants. As part of continuous improvement initiatives, the underlying solution will need to incorporate feedback from customers who transact business through the portal.

The goal of this white paper will be to explain how the people, process, and technology in these actual scenarios relate to Web content management, portal, and collaboration solutions. More precisely, the paper will attempt to map the components of these types of solutions to the specific parts of the scenarios above where they fit best. But first, we will discuss some of the typical ways companies come to decide they need WCM, portal, or collaboration technologies in the first place.

Next, we will address the issue of how best to get the right information to the right people at the right time. We will subsequently examine the three Gilbane client scenarios above. And finally, we will provide perspective on how often the dilemmas in scenarios like these can be satisfied with discrete WCM, portal, or collaboration products.

Variations on One Problem Require a Single, Comprehensive Solution

Too often, companies assess their needs for a Web content management application, a portal solution, and collaboration tools as independent projects. These initiatives pop up as a result of business stakeholders inheriting responsibility for "the WCM problem," usually definable in terms of a general corporate feeling of "losing ground to competitors on the Web," an isolated incident that draws attention to the deficiencies of a company's Web site, or from a CTO who senses that "the WCM application isn't keeping pace with other enterprise IT applications." Alternatively, an LOB manager or executive may inherit responsibility for replacing the enterprise portal because "people are not getting the information they need from our intranet" or because "we need one place where people can go to get company information." Content may be languishing in

isolated repositories, and it is “the portal’s role to expose it all.” Alternatively, a director of project management at a large corporation may become frustrated that all of his teams are creating the same materials over and over from scratch, wasting everyone’s time. He has tried to set up processes for getting people to share information, but his attempts have had only a short-lived effect or none at all. Workflow has continued to consist of people e-mailing documents back and forth. All involved say, “Oh yes, it would be great for everyone to share information. We would all save so much time, if only...” But in the end, people and process remain the same, despite these thwarted efforts.

The answer to the question, “What does each of these problematic situations have in common?” is that they all require access to content—usually much of the same content. Although the instance of technology that provides the solution to each problem varies from the others, every problem in the scenario above fundamentally rests on the inability of the business manager or executive to make effective use of content. In one scenario, the content is managed for the Web. In another, content is managed for the portal. And in the remaining one, content is managed for a group of people engaged on the same project or interested in similar topics.

The ideal solution to these problems does not come in three discrete parts. In fact, these “problems” are really not plural in number. They all reduce to an inability to make the most effective use of content in three user scenarios. This is a single business problem to which the best solution is a cohesive, comprehensive one that leverages the value of content for the entire enterprise audience. The diagram below provides a general view of the people, process, and technology involved in the solution to all variations on the problems above.

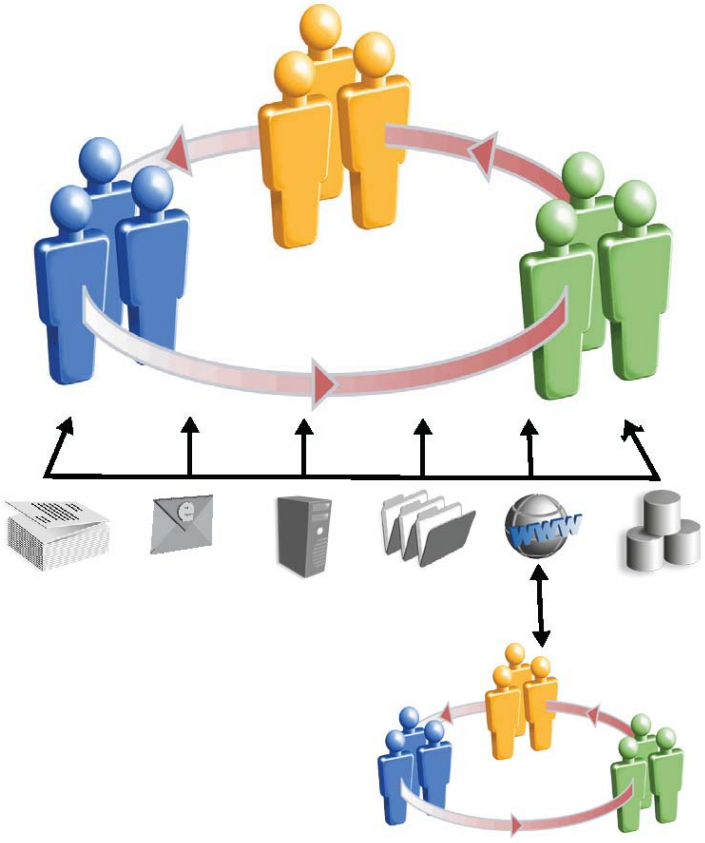

Figure 1. Comprehensive Web solutions include the WCM and portal applications required to manage and display content as well as robust collaboration capabilities on both sides of the firewall.

Use Case One

Gilbane Client: Multinational law firm seeking a "WCM solution"

A multinational law firm recently engaged the Gilbane Group in a consulting project aimed at the recommendation of a "WCM solution" that would allow them to:

- Maintain and extend the quality of their online Web presence
- Reduce the complexity of creating and maintaining content for their internal and external Web sites
- Target content to specific employees
- Include multimedia in their Web sites from occasional or guest participants
- Integrate existing desktop applications such as Microsoft Outlook as well as proprietary client-focused applications with the recommended "WCM solution"

Here is a visual representation of what the client wanted to achieve:

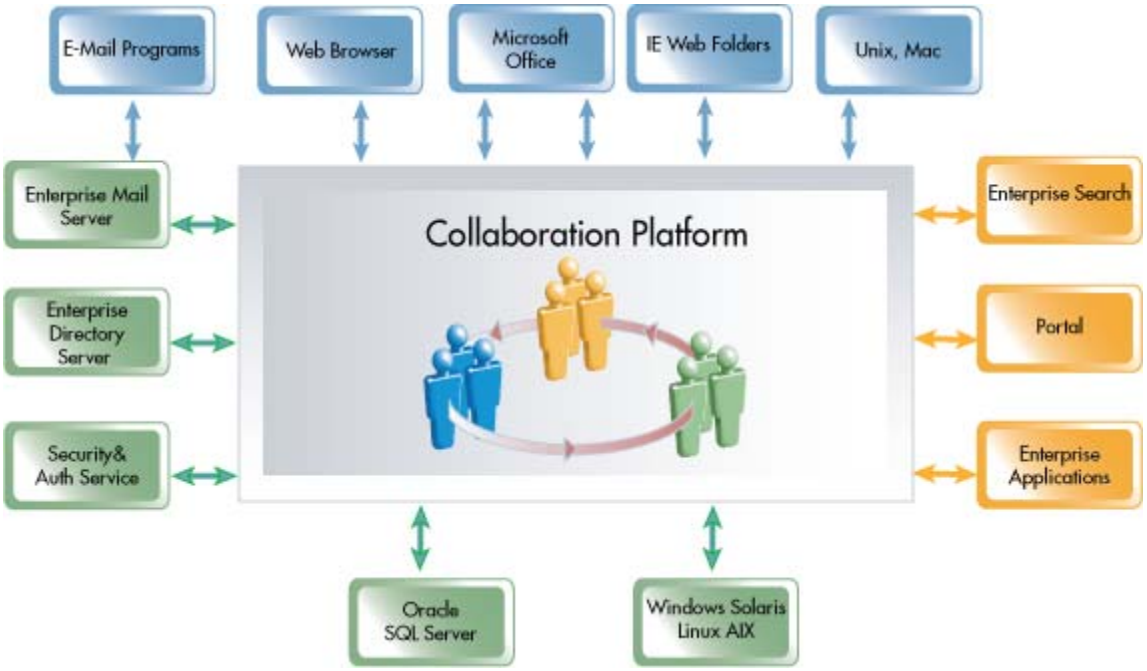

Figure 2. The people, process, and technology of the comprehensive Web solution form a integral whole and cannot logically be separated.

Given these goals, it became clear that the solution would have to include not only a WCM application, but also components of a portal solution and robust collaboration tools.

For the four years prior to project onset, the firm had been managing its intranet, internet, and extranet sites separately, with less-than-optimal content sharing. The

tools and technologies used to manage these sites were often discrete and dissimilar. The processes used for the creation, deployment, and maintenance of sites were labor intensive, varied, and—because the people involved sometimes had little interaction with each other—redundant. In short, the firm's information technology department had built from scratch an in-house content management application along with a multitude of stand-alone supporting applications that on the whole did not allow for the delivery of the right information to the right people at the right time. While the ability to manage basic content for static Web sites was in place, there was no automated workflow, content asset versioning, page templating, or common repository services. The firm needed an enterprise-scale WCM solution. There was also no way to personalize content for specific consumers. The firm needed a portal solution. Furthermore, there was no option for dynamically including people or their feedback in content-related processes. The firm needed a collaboration solution. Of course it required the presentation of its "best face" on the Web, but it also needed the timely, relevant, and compelling delivery of targeted content to employees and customers as well as the inclusion of feedback from those customers in reports to attorneys. In sum, the firm thought it needed a WCM solution. What it needed was a WCM-portal-collaboration solution.

Use Case Two

Gilbane Client: International healthcare and medical research organization inquiring about " WCM and Portal"

In a recent client inquiry from a well-known healthcare and medical research organization, Gilbane was asked about the defining differences between WCM applications and portal applications. The client said it wanted to know for three reasons: (1) the pervasiveness of confusing information on solution providers' Web sites; (2) apparent overlaps in the functionality between the two product categories; and (3) suspicion that their requirements bridged product boundaries. Our response was as follows:

"This question has two answers—a theoretical one and a practical one. In theory, portals provide a doorway (portal < Latin porta, gate) that, when opened, allows content consumers to view a particular set of content. The exact set of content to which consumers are exposed is (a) dynamic, and (b) controllable, either by the application administrator or by the consumers themselves. Because the function of the portal essentially rests in this "doorway" or "frame" function, some customers see portal software as an empty shell or framework, with a set of underlying services, to which content-connected portlets can be added. WCM applications, on the other hand, theoretically provide all of the features and functions required to create, manage, expire, and archive content. This feature set typically includes authoring and editing tools for multiple content types, automated workflow, versioning, audit control, channel management, metadata management, library services, templating, access controls, etc.

"In practice, however, the feature sets of WCM and portal applications often overlap. One vendor's portal product might provide the same feature as another vendor's WCM application. Because portals are composite applications that expose component applications, this phenomenon may also extend to products or modules such as ERP, CRM, search, collaboration, campaign management, etc. For this reason, depending on how vendors group features and functions in their product offerings, any given set of WCM or portal requirements may be satisfied by a variety of product combinations. One vendor's WCM application may suffice. Another vendor's portal product may also be a good fit. And a third vendor's solution may include WCM, portal, and collaboration modules.

"Because of this variation in vendors' grouping and naming conventions, Gilbane clients should, during the technology selection process, seek solutions to their set of content technology problems without becoming distracted by the exact names or number of modules or products required to provide the solution. Let vendors include whatever products they wish in their RFP responses, but hold them responsible for (a) satisfying every requirement, (b) identifying the modules that satisfy each requirement, and (c) giving a total price for all of the modules included in the response. In the end, "WCM and portal" by any other name is still "WCM and portal."

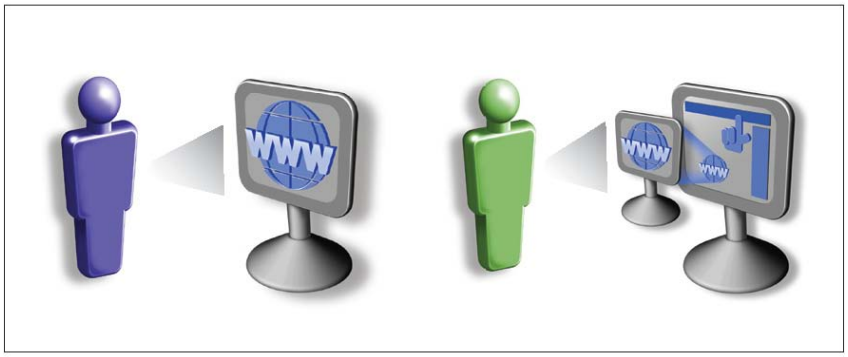

Figure 3. On the left, we see a random content consumer on the Web viewing a static homepage managed by a WCM system. Nothing about the consumer affects the Web page's content. On the right, we see a particular content consumer viewing a customized instance of a Web page managed by a WCM system and personalized by a portal application, which creates unique combinations of content based on stated user preferences and observed online behavior.

To that, we would add that clients should always ask themselves whether their goal is simply to deliver compelling content online. If the answer is "yes," then they should consider a best-of-breed WCM application. Should they also want to control which information is delivered or to whom information is delivered based on the profile of the consumer, they should also consider a portal solution. And finally, if they want a multi-directional flow of information—in order to improve business processes, for example—they should also consider collaboration products. A WCM-portal-collaboration solution becomes necessary whenever people and process need to interact iteratively to achieve business goals such as improved customer service, higher quality product development, or more effective continuous improvement initiatives.

> ***"A WCM-portal-collaboration solution becomes necessary whenever people and process need to interact iteratively to achieve business goals such as improved customer service, higher quality product development, or more effective continuous improvement initiatives."***

Use Case Three

Municipal tourism board seeking a "WCM solution" in order to develop a travel portal with "strong social aspects"

Currently, the Gilbane Group is working with the tourism board of a large municipality to help them choose the right technology solution for their travel and tourism portal. The travel and tourism industry represents one of the largest revenue streams for the city and its businesses, and the need for getting information about the city to potential leisure and business travelers—and to the city's businesses that stand to sell goods and services to those travelers—is critical to the city's economic viability. The tourism board has also stated that it is critical for them to understand the sales conversions rates (percentage of those expressing interest in goods and services who actually make purchases) on their own and their partners' Web sites as well as to get feedback from customers regarding what information was useful and what was not. To be successful, the travel and tourism portal needs to display information about the goods and services the city has to offer, both to individuals and businesses, based on their particular interests. So that the quality and profitability of the site improves over time, the portal also needs to incorporate feedback from content consumers themselves into ongoing Web site improvement initiatives. The city's generic description of the goal is "to have a useful, profitable, highly interactive travel Web site that generates interest in and revenue for the city'."

	WCM	Portal	Collaboration
Audience			
Enterprise	Does the solution successfully promote the online brand?	Does the solution improve penetration of the target audience?	Does the solution support process improvement through multi-directional information exchange?
Internal Application Users	Is the feature set complete and easy to use?	Is the feature set complete and easy to use?	Is the feature set complete and easy to use?
Online Information Consumers	Can I find the information I want?	Do I automatically get the information I want, whether I knew I wanted it or not?	Can I give feedback on what needs to be changed?

Figure 4.

Figure 5. A personalized instance of a Web site delivered to a specific consumer based on his interests. Note that the flow of information is bi-directional—the site accepts user feedback. This representation of a WCM + Portal + Collaboration solution is essentially what the municipal tourism board needs.

"People, Process, and Technology" – Getting the Right Information To and From the Right People at the Right Time

To be sure, the individual components of an overall WCM-Portal-Collaboration solution involve different combinations of people, process, and technology. But the goal of delivering the right information to and from the right people at the right time is a unified one, and it draws the various people, processes, and technologies together into a cohesive whole that can only be assembled when all of the parts are present.

Only as components of an overall solution can WCM, portal, and collaboration technologies comprehensively address online branding, content targeting, and process improvement concerns.

WCM provides the ability for the enterprise to present its best face to the world without knowing anything about who's looking. Portal refines this into a presentation based on what is known or what is learned about the observer. Finally, collaboration incorporates observers' feedback into a process that changes the process itself. Ultimately, without WCM, there is no online brand. Without portal, there is no targeting. Without collaboration, there is no improvement.

About Vignette

For over ten years, Vignette has been an undisputed leader in Web Content Management. The requirements of our early customers drove support for previously untested tactics like personalized experiences, online social networking, and a wide range of content types. The key to their success of all of these customers was Vignette's ability to help them both manage and deliver vast amounts of content.

Today, organizations' aspirations are far more sophisticated than simply providing a compelling Web site. They expect to fully exercise the Web as a vehicle for managing every aspect of the customer experience.

Vignette's technology offerings have also grown in sophistication. Today we address the broad next-generation Web initiatives of large organizations in virtually every industry. We make it possible for our customers to provide online experiences that are personal, social, and available from virtually any device or channel. Everything we do is about enriching and optimizing the online experience—for customers, employees, partners, patients, constituents, and any other significant audience.

Our solution includes content management, portal, and collaboration products that consistently gain third party recognition, as well as adoption by some of the world's most powerful online brands. Our three core products work together and can be used in any combination to create the quality and quantity of online interactions that each of our customers requires.

Vignette is headquartered in Austin, Texas with operations worldwide.