



# Content Management System Pocket Guide

| A guide to evaluating, implementing and deploying content management systems |

► A guide to evaluating, implementing and deploying content management systems

## Table of Contents

<b>Introduction</b> .....	<b>3</b>
<b>Anatomy of a CMS Project</b> .....	<b>4</b>
<b>Decide and Buy</b> .....	<b>4</b>
<b>Developing the Short List</b> .....	<b>5</b>
<b>Request for Proposal Overview</b> .....	<b>6</b>
<b>Sample RFP</b> .....	<b>7</b>
<b>Implement and Integrate</b> .....	<b>15</b>
<b>Best Practices</b> .....	<b>15</b>
<b>Manage and Maintain</b> .....	<b>17</b>
<b>Upgrade and Enhance</b> .....	<b>18</b>
<b>Conclusion</b> .....	<b>18</b>
<b>Appendix</b> .....	<b>19</b>

## Introduction.

Congratulations you've decided to embark on the journey to implement a content management system (CMS) for your Web site. This document assumes that you have already built the business case for purchasing a CMS and has been signed off on by the appropriate stakeholders. If not you may consider our "Building The Business Case For CMS" white paper – which is also offered in the [CrownPeak InfoCenter](#).

If you're decided, you're likely considering a number of solutions including installed software, open source software, hosted services and developing your own custom solution. Each have their own merits, limitations and unique requirements, but all pretty much follow a basic set of considerations for implementing and deploying.

There are definitely a lot of horror stories floating around detailing the pain, frustration and expectations of implementing a CMS. The one thing that we would like you to get out of this document is to understand that it is not that hard. Each company and each vendor approach to the process is a little different, which is why we have consolidated best practices designed to arm you with a high level set of information that will guide you through the evaluation, implementation and deployment process. To be clear this is not meant as the definitive guide to content management. There are organizations and whole books devoted to that; rather, this is a "field guide" to the process. So let's begin to inspect the pitfalls and explore the opportunities available in rolling out this new solution for your organization.

► A guide to evaluating, implementing and deploying content management systems

## Anatomy of a CMS Project.

As with any project, implementing a new CMS for your Web site, starts with a set of ideas for the types of new services, new capabilities or other desired outcomes from your new solution. This **Mandate** should be communicated and approved by your project sponsors. For the purposes of this document, references to Web sites can refer to any Web property including corporate Web sites, Intranets, Extranet, landing pages, etc.

The CMS implementation project will typically fall into the following four-step process:

1. Decide and Buy
2. Implement and Integrate
3. Manage and Maintain
4. Upgrade and Enhance

Each step has it's own challenges, deliverables and requirements so let's explore each in more detail.

### 1. DECIDE AND BUY

Once your Mandate has been approved, consider developing an "official" document which will explain the project and its desired outcome in detail. This **Project Definition** will be your requirements document as you gather all of the desired outcomes and new capabilities, and start to map them against a set of features, functions and services that you'll require from your chosen solution. Many larger organizations choose to outsource the Project Definition phase to consultants with either vertical expertise and/or previous CMS implementation experience.

In general, the goal of this Project Definition is to outline:

**The Scope of the Project:** What this project will entail (which divisions, which Web sites).

**The Business Goals of the Project:** What we will achieve from a business point of view and how we will measure the success of the project.

**The Key Deliverables:** Is there a new Web site and a new CMS, or just a CMS, other functional items?

**Key Assumptions Being Made:** What key assumptions need to be made and dependencies outlined in order to satisfy the above deliverables.

**Key People Involved:** The key people and their role on the project.

**Functional Business Requirements of the Project:** These are the key benefits not specific features. (e.g. "easier to manage content and publish to the Web" NOT "XHTML compliant output").

**Functional Technical Requirements of the Project:** Keep these high level for now – but capture any critical items (e.g. must be Microsoft based, or must be able to scale separate of Web traffic).

► A guide to evaluating, implementing and deploying content management systems

## **Cost and Duration of the Project:** Your budget and time line.

Once you have developed the Project Definition, there will typically be a natural prioritization in terms of the features, functions and services that your organization will require. Separate these, both in the document and in your selection process, into "product features", and "services/vendor" requirements. For example, you may have a strong need for implementation services, because your IT team has limited bandwidth or, in the case of some smaller organization is non-existent. Or, you may have strong product feature requirements such as workflow and auditing needs because you are in a regulated industry.

### **Developing the Short List**

Once you have defined this Project Definition, it is time to develop a short-list of potential solution providers, and develop a **Request For Proposal (RFP)**. There are a number of analysts and resource Web sites available to you online in order to develop a short list of vendor candidates for your Web content management system. We've listed a few of them in the Appendix of this document.

In general, as you develop your short list of vendors, it's best to focus on matching a few key strengths/weaknesses with your **Project Definition Goals**:

**Geography:** Where is the product available, and where are the support teams for this particular product. If you're in Chicago, do you really want to hire a solution that's delivered and supported out of Denmark?

**Vendor Strengths:** What is the vendor's main strength? What are they generally good at? This isn't necessarily feature/function types of strengths, as much as it is general core competencies. For example, some Web content management solutions specialize in vertical expertise (non-profit or publishing industry experience) or have generalized horizontal expertise (e.g. portal applications, document management, Web site publishing, managing multiple sites etc.) The key is to match your prioritized needs with vendors who align well with them.

**Vendor Weaknesses:** Of course no solution is good at everything. Resist the urge to make this just the opposite of the strengths above. These weaknesses may or may not be important to you. For example, a vendor might be particularly strong in the non-profit sector, but might be weak in their Web site personalization capabilities. But if non-profit expertise is important to you, and you have little or no need for Web site personalization, they might be a good solution.

**OS/ Databases, Hardware and Supporting Infrastructure:** If you're considering solutions that will live within your data center, what will your technical team be able to support? Most of this should fall from your **Technical Requirements**. But a key here is not to immediately eliminate solutions because of something that may or may not be understood from a technical level. For example, don't eliminate a hosted solution because you want to keep control of your Web site hosting environment. Many hosted solutions don't require you to host the Web site with them. **Note: Let vendors address technology requirements from a business point of view.** Too often the process spirals into "speeds and feeds" which is typically not how success of the Web site is measured or how the decisions are being made internally. For example, a CFO is not approving the spend on a CMS based on how many widgets it can integrate with, but rather the value that brings to the business. Vendors should be able to adequately address your goals from a business perspective, if they can't they should be eliminated from consideration.

- ▶ A guide to evaluating, implementing and deploying content management systems

**Licensing:** How is the product priced? What is the general price range. You have to match your product to your budget.

**Service and Support:** This is often overlooked at the point of purchase, but often times is the most important part of the implantation and on going use. If you do not have the support to implement the solutions according to your requirements and the ongoing service to make adjustments as necessary your project is in jeopardy before it even begins.

## Request for Proposal Overview

Based on a short list of 4 to 5 vendors, you can develop and send your RFP. We have included a **Sample RFP** for your reference in the next section below.

In general, try not to get too focused on granular sets of capabilities in a feature/function matrix. Unless you have very specific feature needs, you are unlikely to get actionable information from these feature-by-feature comparisons. Most likely at this point all of the vendors will check the “yes” box. Instead, develop “groupings” of features from the general Business Requirements you defined in your Project Definition, and have the vendor comment (in a paragraph or two) on their ability to meet these specific set of prioritized features or benefits. Also, have the vendor demo these sets of features to you during a product demonstration.

Then, once you have your short list of solutions – consider developing a 1 Month Review Cycle for the top solutions. Below is a sample schedule for a vendor review cycle:

**Week 1:** RFP goes to 4 or 5 vendors on a short list. Within that RFP, should be anything in particular that you’d like to see demonstrated during a meeting, which will be scheduled that week.

**Week 2 or 3:** Online (e.g. Webex) or in person demonstrations with all vendors on short list. If possible all stakeholders should see all demos. At this point you may start eliminating vendors based on capabilities shown in the demo.

**Week 3:** Proposals due from all remaining vendors. Keeping the proposals mercifully short. Again, we’ve included a sample RFP for you in this package.

**Week 4:** Decision and contract negotiations with chosen vendor.

If that sounds too simple – it’s because it’s often made far too complex. In general, if you do your homework on the front end – and make sure that your short-list of vendors are qualified – any of them should be able to handle the “technical functional” requirements of your project. So, the decision will (and should) come down to the following business intangibles:

- ▶ Which solution will meet all my business needs the best?
- ▶ Which solution will be easiest to use, assuring high adoption? Keep in mind our audience of contributors, reviewers and approvers.

▶ A guide to evaluating, implementing and deploying content management systems

- ▶ Which solution will enable me to get up and running the fastest?
- ▶ Which solution provides me the best support and ongoing service?
- ▶ Which solution will scale as my needs grow and change – facilitating change instead of impeding it?
- ▶ Which solution provides the best return on investment?

## Sample RFP

The following is a guide to assist you in evaluating content management vendors. This sample Request For Proposal (RFP) outlines the information that you should gather internally before going through the evaluation process as well as the questions that you should be asking of the vendors that you would like to participate in the RFP process. This is only a guide to help you better organize your thoughts and requirements, please feel free to customize as your organizational structure, technology and business process dictate.

### Objectives

The purpose of this Request for Proposal (RFP) is for [Insert company name] to evaluate potential content management system (CMS) vendors and make a purchasing decision for a Web site CMS [Extranet, Intranet, Corporate site, etc.]. We intend to purchase a Web CMS by [Insert proposed purchase date].

[Also please include any partners (systems integrators, consultants, agencies, etc.) that you will be working with and their roles. Or ask the vendor to recommend a partner based on their implementation experience, relevant project size and scope.]

### Confidentiality Notice

[Your legal team should be able to provide you with appropriate text, this is a sample and is not legally binding text.] All information presented in this RFP is confidential [A Non-Disclosure Agreement (NDA) is an optional request]. The recipient agrees to maintain all information presented in confidence and not reproduce or otherwise disclose this information to any person outside the group directly responsible for evaluation of its contents. This document should in no way be interpreted as a contract (implicit, explicit, or implied), nor does it imply any form of an agreement to candidate vendors.

### RFP Response Requirements

These requirements will be distributed to a short list of [Insert number of proposed vendors] vendors who were identified based on their stated capabilities and the likeliness that they would meet all of [Insert company name] Web content management needs.

All vendors are asked to review the requirements and prepare a cost proposal based on [Insert company name] current Web infrastructure, number of sites and anticipated number of CMS users. All proposals must be valid for a minimum of 90 days following the closing date of the proposal. Along with the proposal, the vendor must guarantee that upon accepting the proposal the vendor will execute the contract according to the procurement specifications.

- ▶ A guide to evaluating, implementing and deploying content management systems

### Key Dates

Vendors are invited to participate in a product demonstration to be scheduled [Insert date range]

The RFP should be completed by [Insert completion date and time, be sure to specify time zone] and returned via [Insert preferred delivery method] to [Insert recipient and contact information].

### Response Format

Responses must be sent in electronic [or specified format] format to [Insert recipient and contact information]. Any questions about the requirements or the CMS selection process should be directed to [Insert recipient contact information] no later than [Insert date]. Any questions and responses will be distributed to the group of vendors [This is optional, but is a standard practice].

### RFP Evaluation Process

[Insert company name] will award the contract to the CMS vendor that best meets or exceeds business and system requirements. Criteria will include, but is not limited to: [Following is a sample of evaluation requirements:]

- ▶ The features and functionality of the CMS product.
- ▶ Product support and service.
- ▶ Vendor's experience providing a CMS solution for Web sites with similar requirements.
- ▶ Vendor's ability to work within budget.
- ▶ Strength of vendor's partners [if any listed].
- ▶ Vendor's references.

### Project Time line

We expect to make a final decision on [Insert proposed purchase date] and begin the implementation on [Insert proposed implementation start date] to be completed by [Insert proposed completion date]. Below is a high level schedule of key milestones and associated dates.

- ▶ A guide to evaluating, implementing and deploying content management systems

Milestones	Date
Conference calls with vendors to demo software, answer questions and clarify expectations	Weeks of [Insert date range]
Responses due	[Insert date]
CMS vendor selection	[Insert date]
Finalize contract with vendor	[Insert date]
Design phase [If applicable]	[Insert date range]
Begin CMS implementation	[Insert date]
[Insert company name] approval of prototype	[Insert date]
User testing, iterative changes	[Insert date range]
Content migration and user training	[Insert date range]
QA	[Insert date range]
Go live	[Insert date]

## Project Background

[This section should provide a brief background on the company and Web site you are looking to manage to give the project an historical context.]

### Company Background

- ▶ Date founded
- ▶ Number of employees
- ▶ Brief description of core business
- ▶ Vertical markets served

### Web Site History

- ▶ Purpose of Web site(s) you wish to manage (ecommerce, catalogue, corporate, internal communications/information, developer, lead generation, etc.)
- ▶ Who visits the Web site(s) you wish to manage. This can be as extensive as you want based on how much data you have as well as the nature and purpose of the site(s). Basic information can include: typical visitor demographic profile (sex, age, location, title/business unit, industry), number of unique visits per day, average number of page views per unique visitor, average visit duration, and why they tend to visit you Web site(s) (this can be most visited pages, best selling product, etc.)
- ▶ Current site construction and content management system in use. For example the current site, [www.yourwebsitehere.com] is a combination of static HTML pages, which are maintained ad-hoc using Dreamweaver, and dynamic ASP pages managed through a custom built editing tool linked to a SQL database. There are approximately 3000 static HTML pages and another 1000 dynamic pages that are generated by some 10 ASP templates, and an additional 5,000 object pages in our online collections database.
- ▶ Reason you are seeking to either implement or replace the current CMS.

- ▶ A guide to evaluating, implementing and deploying content management systems

## Web Team

- ▶ Current Web team organization and their roles in managing the site. This should be titles of the team and a description of their day to day role and activity in currently managing the site.
- ▶ Current content contributors. This can represent either individual titles for contributors or entire groups within the organization. For each contributor you should try and include a brief description of the typical workflow and general usage requirement. For example:
  - Marketing: Staff in this department contributes content to the Web through 2 channels 1) by emailing Microsoft Word documents directly to the Web team or 2) some have access to the current CMS and contribute via the interface. The Web team is typically responsible for making any content updates the marketing team requests as well as building landing pages for specific marketing campaigns.
- ▶ Future Web team organization and a description of their roles in managing the site. If upon implementation of the CMS the Web team structure will be changing you should specify the proposed organizational structure and roles. This should be titles of the team and their future day to day role and activity in managing the new site.
- ▶ Future content contributors. If upon implementation of the CMS the content contributors will change from the current structure you should specify the proposed structure and roles. This can represent either individual titles for contributors or entire groups within the organization. For each contributor you should try and include a brief description of the typical workflow and general usage requirement. For example:
  - Marketing: Staff in this department contributes content to the Web through 2 channels 1) by emailing Microsoft Word documents directly to the Web team or 2) some have access to the current CMS and contribute via the interface. The Web team is typically responsible for making any content updates the marketing team requests as well as building landing pages for specific marketing campaigns.

## Technical Considerations

[Insert company name] relies upon mostly commercially available hardware and software. We are primarily a [Insert native environment, Microsoft, Java, Linux, etc.] environment. The Web CMS solution must work with our existing technical specifications: [List any technology requirements that you have. This would include your organization's platform, Web hosting arrangement and any third-party or other hosted solutions you subscribe to (e.g. salesforce.com).]

## Questions for Vendors

Please provide detailed answers to the following questions. [Insert company name] may reject conditional or incomplete proposals. [While we understand that each organization's requirements will be completely different, below is a sample structure and common list of requirements that we have found fairly common across implementations]

- A guide to evaluating, implementing and deploying content management systems

These questions are organized by functional areas, with questions pertaining to both our required and desired functionality. We are seeking a solution that satisfactorily meets the majority of our required features, and, ideally, meets some of our desired features as well.

## I. VENDOR BACKGROUND

### A. Company Background

1. Please provide a brief overview of your company, including when you were founded, how many employees you have, and how many customers you have.
2. What percentage of revenue do you typically invest in research and development (R&D)?
3. Do you work with any [insert your industry] organizations? Please list.

### B. Product Overview

1. Please list all products relevant to this RFP, including version numbers.
2. Please describe your product architecture – include diagrams if necessary.
3. Please describe your system requirements – server and client.
4. Please provide a list of databases with which your product integrates.
5. Do these integrations require customization?

### C. Competitive Information

1. Whom do you consider your major competitors?
2. How do you differentiate yourself from your competitors – what makes your product different?
3. Please provide three references of current customers with initiatives similar in scope to our project, preferably [insert industry] organizations or content-rich, information driven Web sites.

### D. Licensing, Implementation, Training, and Support

1. Please describe your maintenance and support model.
2. Please describe your implementation/professional services model.
3. Please describe your alliance program and provide a list of some of your preferred partners. We are interested in both third-party software vendors that your product integrates with, as well as the names of systems integrators that you would recommend we work with.
4. What are typical implementation costs for a similar project of this scope?
5. Please provide an overview of your education and training options.
6. How often do you release major versions?
7. Are upgrades included in maintenance?
8. How long do you maintain older versions of software for customers who don't upgrade?
9. Please provide an overview of your technical support options.
10. Please detail your technical support escalation process.

## II. [Inset company name] FUNCTIONAL REQUIREMENTS

### A. Content Creation

#### 1. Required Features:

- a) Does your product support time-based publishing and expiration of content?
- b) Does your product give authors the ability to preview the rendered format of content?
- c) Does your product have an intuitive WYSIWYG interface for users who don't have HTML skills? Please provide a screen shot of the interface.
- d) Does your product have an HTML interface for users who want to edit HTML code and not use the WYSIWYG interface? Please provide a screen shot of the interface.
- e) Can your product support CMS-managed navigation? Please describe how this can work.
- f) Does your product have the ability to integrate with XML or other standard file formats?
- g) Does your product allow enforcement of file naming conventions?
- h) Does your product allow for the creation of static "vanity" URLs?

#### 2. Desired Features:

- a) Does your product support Web-based client access to the CMS? Which browsers are supported?
- b) Does your product produce compliant mark-up that adheres to XHTML standards?
- c) Does your product allow for easy editing of CSS styles via the CMS? Can a user select and apply CSS styles when entering content? Please provide a screen shot of how this works.
- d) Can users visually build templates (i.e. no need for programming language)? Please provide a screen shot or describe.
- e) Does your product allow for the management of custom 404 pages?
- f) Does your product maintain a dynamic sitemap?
- g) Does your product integrate with any email marketing products? Please provide details.
- h) Does your product generate an XML document for Google sitemaps?
- i) Does your product allow for the creation of printable versions of Web pages?
- j) Does your product allow for the creation of surveys and polls?
- k) Does your product contain a blogging feature?

### B. ASSET SUPPORT

#### 1. Required/Desired Features:

- a) Does your product have an object repository that supports all assets?
- b) Does your product support all rich media formats?

► A guide to evaluating, implementing and deploying content management systems

## C. METADATA SUPPORT

### 1. Required/Desired Features:

- a) Does your product give administrators the ability to update metadata vocabularies and thesauri? Please describe how this works.
- b) Does your product allow users the ability to configure the metadata schema? Please describe how this works.
- c) Does your product have the ability to create and present pick lists for authors to assign properties to content?
- d) Can your system allow metadata fields to be set as "required"?

## D. WORKFLOW MANAGEMENT

### 1. Required Features:

- a) Does your product support staging and production environments? Are there extra license costs for supporting a staging environment?
- b) Is there visual differencing for text and/or code views of content (highlighted text or side-by-side viewing)? Please provide a screen shot of what this interface looks like.
- c) Please describe how workflows are created and managed.
- d) Can you notify workers of task assignment via email (i.e., one-click access links in emails)?
- e) Can users set expiration dates on content and get email alerts when content has expired?
- f) Can users create multiple workflows for different authors and document types?
- g) Can the system access LDAP or Active Directory directories to manage workflow permissions?
- h) Does your product support automated archiving of CMS data?
- i) Can users roll back to previous versions of content and/or templates? If so, please provide details.

### 2. Desired Features:

- a) Does your product allow commenting?
- b) Does the product offer automatic link checking?
- c) Can you expire and retire content while retaining dated archival copies?

## E. ADMINISTRATIVE REPORTING

### 1. Required Features:

- a) What kind of administrative reporting does the system offer? Please describe.
- b) How far back in time are reports stored in the system?
- c) In what formats are administrative reports available (i.e. Web-based, Excel, Word, PDF, etc.)?

► A guide to evaluating, implementing and deploying content management systems

2. Desired Features:

- a) Can users create and modify custom administrative reports?
- b) Do you integrate with industry-standard Web analytics software, either hosted or installed (e.g. Web Trends)? What kinds of integrations have clients done?
- c) Do you have any partnerships with any Web analytics software vendors? Please describe the nature of the partnerships and the pricing arrangements.

F. SEARCH

1. Required Features:

- a) Please describe your search architecture.
- b) Do you offer full attribute and content searching?
- c) Do you offer "guided navigation" or "faceted search" as an extension of your search product.
- d) Do you offer the ability to search multiple sites/domains as part of the standard search product.
- e) Do you offer the ability to provide "advanced search" and "segment search" against metadata managed in the CMS.

G. CONTENT DEPLOYMENT

1. Required Features:

- a) Please describe your content deployment framework.
- b) Can we schedule automated deployment to our production server?

2. Desired Features:

- a) Does your product support content in any encoding schema, including double byte language characters?
- b) Describe how your system allows output to multiple devices (e.g. wireless devices), if any?

H. ENTERPRISE INTEGRATION

1. Required Features:

- a) Can your product co-exist with ASP/.Net?
- b) Do you support IIS?
- c) Do you support OS security, LDAP, and MS Active Directory for authentication? (only applicable to installed solutions, not hosted)
- d) Do you support 128-bit encryption and peer-to-peer authentication?

2. Desired Features:

- a) Do you provide an open SDK for customization?

► A guide to evaluating, implementing and deploying content management systems

## I. PRICING

Please include a detailed cost schedule for all products and services you propose for our solution, including special terms and conditions. Pricing should cover:

- a) Software
- b) License fees
- c) Taxes and Shipping Fees
- d) Supplies
- e) Installation costs
- f) Payment schedules
- g) Terms and Conditions
- h) Discounts
- i) System support
- j) Training
- k) Total cost

## 2. IMPLEMENT AND INTEGRATE

Entire books have been written about this next phase so we certainly won't try to capture all the detail here. Additionally, the implementation and integration will differ greatly depending on the type of solution that you have chosen (e.g. installed vs. hosted). But as you put together your project plan consider the following milestones:

1. Site HTML and design
2. Content audit, both current and retired (concurrent with CMS Build)
3. CMS build and integration
4. Develop workflow and approvals (concurrent with CMS Build)
5. Review initial implementation (Initial Q/A)
6. Make iterative changes and critical initial launch path
7. Content migration/creation
8. Training on the CMS. (Best practice is to combine the training with the content migration/creation phase)
9. Test publish
10. Publish to live site
11. Q/A
12. Launch

### Best Practices:

As you develop your own project plan for implementation, here are some of our best practices based on thousands of implementations:

**Check Your Time Before You Send The Check:** Depending on the solution you choose and the size of your site, your project can take anywhere from 30 days to 12 months to implement. Be sure that BEFORE you chose a vendor, that you get an estimate and/or commitment on the implementation time line and that it meets your business need.

► A guide to evaluating, implementing and deploying content management systems

**It's A Process - Don't Try To Boil The Ocean For Launch:** Content Management is a process. Most likely you will not get it exactly right upon your first launch. There are always unforeseen obstacles and more often than not something will be left out. So, accept that now, and don't spend weeks and weeks trying to capture every little feature, workflow step, approval process and/or template that you're going to need. Phase your launches and get the key functions up first. Your CMS solution should be flexible enough for you to make easy and fast corrections along the way, AND after you've launched.

**Take Inventory – Where's the Content who's got the Content?:** Early in the implementation (or even before) conduct a content audit. The biggest challenge you will face during this project will be the migration of the existing content into the new content management system. Make yourself an Excel spreadsheet that lists all this content inventory. The audit should list all the pages on the Web site, whether they will be included in the new site, where they will live in the new site (assuming a re-design) and whether it needs to be edited prior to moving. Then, you can use that as a checklist when migrating the content.

When you determine the strategy for content migration, consider that you will likely NEVER want to do this again. So, take the time now (if you can) and re-calibrate, re-categorize, and take care in how you migrate your content. For example, if the Title, Author, Date and Body of a page are all in one field today, why not take the extra time to manually import those into three separate fields in the new CMS, rather than take the easy way out of just migrating that field automatically into a new field in the new CMS.

Also, go back to the previous checkpoint. Find out the "critical mass" of content needed to re-launch your Web site and draw a line there. You can always go back and migrate your "archive" site when you have the time.

**Combine the Content Migration and User Training:** What better way to get the contributors, reviewers and approvers used to working in the CMS than actually creating content. Migration is typically the most painful part of the implementation, but it serves as a good training course on how to use the CMS before it's actually live.

**All Content Should have an Owner:** There should always be someone responsible for the quality and placement of all the content on the site. These can be different people for different articles, assets, sections or pages on the site, but they all need to have an assigned owner responsible for making sure it is up to date and correct.

**Simplify Your Life, Your Workflow and Your Approvals:** When designing your workflow and approval processes for your new CMS, resist the urge to use the technology to "herd the cats". If your workflow process is too complex or cumbersome, be prepared for resistance to adoption of the CMS. The main goal is to get the new CMS adopted throughout the organization. Keep it simple to begin with, and then add restrictions as people either violate something, or need to be managed.

When you're through with the content migration process, and have successfully launched your new Web site with the CMS integrated you're ready for step 3.

► A guide to evaluating, implementing and deploying content management systems

### 3. MANAGE AND MAINTAIN

Choosing the right CMS software is important, but developing the right plan for services and support of that application is even more important. For some reason, services often take a back seat to product selection during the early phases of a CMS project, when budgets are often set. This may have something to do with the difficulty for software vendors to differentiate their services, and thus their desire to focus on product features and platform choices.

The two pieces of successful services are implementation and ongoing support and maintenance. Getting them both right is a requirement; but the more neglected of the two is, of course, support and maintenance. The consequences of failing to implement correctly are clear – the software doesn't work, is clunky or buggy – or all three. The consequences of failing to manage and update the system are much less clear, but over time are just as severe.

A well-chosen, well-implemented, but poorly maintained content management system will lead to a bad Web site over time. For sites that change frequently, this can happen quickly. It's sadly ironic that the software system put into place to enable a site to be managed can also be that site's eventual degradation.

Imagine an IT department who has a dedicated group of CMS experts; always ready to respond to any request by a Web site manager to adjust the CMS. Unfortunately, in most cases, this simply isn't possible. Having an expert integration firm hanging around and writing a new scope of work for every system change can be untenable as well – even if you can find one willing and available to work on a system over many years.

An internal service solution is often chosen, but as we've said, it can be difficult for an internal group to develop expertise in the application and find free developer time, especially when rapid changes are required over and over again. But wait, didn't we just say it's a requirement to have good support and maintenance – hence the dilemma? Of course, these problems are solved to a great extent by the software as a service (SaaS) model. But most organizations haven't moved in that direction yet, and need to find a balance between internal service levels and cost/resource availability.

The other half of the ongoing management of a content management implementation, and just as important as having developers working to adjust the application over time, is the application "owner". Often this is the same person who manages the project implementation, who later trains new users, plans application changes, works with vendors, and supports system users. Owning the CMS is typically only a part of this person's job. They often own all of the other Web functional pieces – search, email campaigns, analytics, and so on. They also may own responsibility for the site's content. If so, we hope they have a team to help! Whether the application owner relies on an external team, an internal team, or a combination, that team needs to exist and be responsive. A service level agreement, even if it is just a simple, internally created document, is a great document work from. It will set expectations for everybody's responsibility.

So the bottom line is this: don't skimp on building post-launch services into the project plan and budget as you start your next CMS project. Define the players and responsibilities in the immediate post-launch "tweaking blitz" and for the multi-year maintenance, upgrade, and modification program. It's not the glam part of the project, but success in the support and maintenance phase will determine how long the application lives and how successful it is in the months and years post launch.

► A guide to evaluating, implementing and deploying content management systems

## 4. UPGRADE AND ENHANCE

So, now you've launched your new CMS and your Web site. You've trained your end-users and you have a hold on your maintenance challenge. The content management solution you've chosen is flexible enough to handle ongoing system enhancements and changes – and now you can think about upgrading and enhancing both the Web site and/or your CMS.

During your selection process, this should have been a big question for the vendors. Remember one of the core questions we suggested that any CMS vendor answer is how will your solution facilitate change to my Web site ongoing and not make it hard for me to re-design, tweak or enhance my Web site.

Assuming you got a good answer there this will be key during this phase. Inevitably you will want to add new sections to your Web sites. You will want to add new micro-sites, new landing pages, new integrations with Web analytics solutions etc... This means developing new templates, new workflows, new HTML.

The key here is to approach this in just a mini-version of how you approached the initial project. So, you can go right back to the beginning of this document and start the process all over again. Create an addendum to your Project Definition document – and move on from there.

## Conclusion

Remember, content management is a process, not a product. It's all about collaboration with you, your team and your vendors.

Choosing the right Web content management solution will truly strengthen your business. It will not only create efficiency for the Web site management process, but (depending on your business) provide you with a number of opportunities to create competitive advantages, revenue opportunities and new avenues for customers and partners to communicate with you through your Web site.

You're an expert in your business – and you shouldn't have to become an expert in Web content management in order to be successful. We would suggest working with a content management vendor who will become a core part of your Web site management team as a content management expert. But then again, as you might expect – we're biased that way.

We wish you the best of luck with your CMS implementation – and we hope this pocket guide is of some help to you.

- 
- ▶ A guide to evaluating, implementing and deploying content management systems

## Appendix

Resources For Consulting and CMS Vendors:

- ▶ CMSWatch ([www.cmswatch.com](http://www.cmswatch.com))
- ▶ CMSReview ([www.cmsreview.com](http://www.cmsreview.com))

**CrownPeak**  
5880 W Jefferson Blvd  
Unit G  
Los Angeles, CA 90016

**sales@crowpeak.com**  
**www.crowpeak.com**  
**Toll Free: 866-877-5858**  
**Tel: 310-841-5920**

**CrownPeak™**  
MANAGE CONTENT NOT TECHNOLOGY