



The Secret To Managing A CMS Deployment – It’s Not Software

Robert Rose, VP of Marketing and Product Strategy for CrownPeak explains the importance of user adoption when deploying a content management system.

There's a great line in *The Producers* (the 1968 Mel Brooks film) where Max Bialystock says: "*I'm condemned by a society that demands success when all I can offer is failure!*" I know first hand that for many managers, confronted with deploying a new Web content management system (CMS), that sentiment is very true.

The challenge is that it's a catch-22. For any Web content management project to succeed, the stakeholders (contributors) need to adopt and embrace the new system. However, these same stakeholders are, many times, simply uninterested in learning anything new, or changing the way they perform their current jobs. It becomes the challenge of the CMS Project Manager to overcome that issue and not only roll out a successful new software tool, but a new workflow process as well.

Failure to overcome this challenge can be the death knell of the project. Failures to achieve adoption by the stakeholders can sometimes cause the organization to forfeit all of the benefits that a Web content management system typically affords. Stakeholders who grow frustrated with the system will simply ask for additional resources to support the new processes. This is exemplified when organizations add an additional resource to publish content, or to support an unwieldy software implementation, and basically turn the CMS into a very expensive FTP client. Content contributors then run back into their Microsoft Outlook holes and send out their content updates as they did before. And, at worst, this can lead to a complete avoidance of the CMS to update the site – transforming the software into nothing more than a series of large files taking up space on the server.

To be successful, the project manager assigned (or was it the one who didn't take two steps backward) must not only take steps to make sure the right software solution is chosen, but (more importantly) ensure that the content contributors and key stakeholders are invested in the success of both the launch *and* the ongoing management of the CMS.

Remember, the number one goal of a Web content management system is to empower the non-technical business users to publish to the Web site. Every other feature that you are grilling vendors about including workflow, versioning, publishing, search engine optimization and digital asset management comes along for the ride. If users don't adopt the system, the other features are useless.

So, while this isn't a comprehensive list, here are the top three things that non-technical project managers can do to ensure success in the deployment of a new CMS.

1. Communicate – Feel Their Pain

We've all heard the cliché of the project built by committee – somewhere there's a camel and the original design for a horse. But also don't forget the "*Wisdom of Crowds*" (great book by James Surowiecki). The first thing the Project Manager should assemble is a community of contributors

▶ The Secret to Managing a CMS Deployment

that will be utilizing the new CMS. Create a series of forums about what's broken with the current process, and how the new process should work.

Once these forums have been established, 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

2. Usability is More Than Just a Pretty Interface.

As you are selecting a tool to deploy, it's helpful to remember that number one goal again. If you don't provide your users with a usable tool then all of the other features are useless.

That said, usability is much more than just an easy way to cut and paste from MSWord into a WYSIWYG editor. Savvy Project Managers will pay attention to the flexibility of the system – realizing that it contributes to overall usability:

- ▶ **Workflow and collaboration:** How does the system handle workflow and is it intuitive for users? Does your organization work with a “task” based type of workflow, a more non-linear based workflow or something highly structured with complex legal review. How does the tool facilitate collaboration as content is moving through a workflow. Is it intuitive? Is it easy?
- ▶ **Flexibility for users:** To put it in the estimable words of Star Trek's Spock – How does the system handle the needs of the many vs. the needs of the few or the one? If you have users with only one particular task on a repetitive basis, can we limit their interface down to just that task? Can you name your own workflow steps, so that they make sense to you and not have to learn an artificial “application” language.

▶ The Secret to Managing a CMS Deployment

- ▶ **Flexibility for content re-use:** Making sure that the system makes content as easy to re-use as possible across as many different channels as possible.

Additionally, as you make these decisions during the implementation of the CMS, now is not the time to stop your community forums. You need input from your authors and editors on how things should proceed:

- ▶ How can we apply a common language or wording on input forms and sections of our Web site so that we all know what's being managed.
- ▶ Establishing a common interface for all authors, so that they can help each other. Yes, flexibility is good, but homogeneity breeds community.
- ▶ Workflow shouldn't herd the cats. Again, providing for flexible workflow can produce structure, but too much structure can breed frustration with the software when the author needs something done and their "approver" isn't around.

3. Life After Launch – Now Is When Your Community Investment Pays Off

Because CMS projects have many touchpoints with different parts of the organization, making sure that you have invested stakeholders across all of them is extraordinarily important. Establishing an effective training, "application ownership" and support strategy can be the most important part of an effective project.

For some reason, training, and support 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.

But, the two equal sides of a successful CMS project 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.

Assigning an "owner" is also important. 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 agreement to work from. It will set expectations for everybody's responsibility.

► The Secret to Managing a CMS Deployment

Remember, content management is a process – it's not a product. There is no "end". Once you've deployed a solution, the journey is just beginning. Establishing a structured project, with clear investment by the people who will be using the software day to day is paramount to achieving a successful deployment. Dedicating resources to support and ongoing management is the critical key to maintaining that success over time.

Even if our colleagues believe that becoming "empowered" is really corporate-speak for "adding to my to-do list", they will certainly enjoy becoming part of what can become a huge success for the organization. A well-deployed, well-managed content management system can make a tremendous difference to success of any business. And, who knows, you may even end up like Max and Leo – successful producers despite having to manage a content management system deployment.

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

sales@crowpeak.com
www.crowpeak.com
Toll Free: 800-887-1944
Tel: 310-841-5920

Copyright 2000-2007 CrownPeak Technology. All rights reserved. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopy, recording, or any information storage and retrieval system, without permission from CrownPeak Technology. CrownPeak is a trademark of CrownPeak Technology in the United States. All other company, product and service names and brands are the trademark or the registered trademark of their respective owners.