The Only Guide You'll Ever Need to Select a Web Content Management System:

An 8-Step Guide to Successful WCMS Selection

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Introduction: It's Not Just About the Technology

Today it is not enough to just manage your web content. If you want to reach and engage your target audience – be they customers, students, citizens, or donors - your online strategy must deliver accurate, relevant content in the right format and at the right time.

Choosing the right Web Content Management System (WCMS) to build your online strategy is key. However, there are more than 2,000 WCMS solutions currently available in the market. These solutions vary in price, design, and functionality, and many systems provide much more than just content management capabilities. The average organization has neither the time nor expertise to sift through all these options. And if you have an existing WCMS system, you may not need to change the underlying system at all in order to add more capabilities. But choosing the best technology is not enough to guarantee you success.

At Digital Clarity Group, after running more than 100 technology selections worldwide, we believe that while selecting the right technology is important, selecting the right service provider (agency or systems integrator) to implement that technology and carry forth the organization's strategy is just as critical, if not more so. Technology alone is neither the reason for success nor the reason for failure. If you engage the wrong service provider, you run the risk of exceeding your budget, blowing past your deadline, failing to meet user and stakeholder expectations, or never going live at all.

The goal of this guide is to simplify the WCMS selection process for your organization based on what Digital Clarity Group's analysts have learned works best *in the real world*.

The 8-Step Process

Step 1. Validate the Need

If you are considering investing in a new WCMS, your first question should be: do we even need to do this? Do we really have a technology problem at all? Could we solve our problem by instead addressing our content, course-correcting our strategy, or by updating, modifying, or complementing our existing technology? Implementing a new WCMS solution whether from scratch, or migrating from one solution to another, is incredibly disruptive and time-consuming. It can take a company up to two full years to select, implement, and migrate content onto a new system, let alone addressing the challenge of user adoption and training.

If you believe that you do need to invest in a new WCMS, your first step should be to identify the WCMS requirements. Requirements are a collection of both needs and wants. Both are important, but needs should be addressed first. Start with your existing CMS system. Look first at what is working and should be included in the new system, then ask what is missing. Don't forget to consider possible future needs in order to ensure that any new WCMS will be able to meet those as well. In an ideal world, the compiled list of wants and needs should be reviewed with your existing technology vendor and service provider to understand the degree to which they can be addressed by the existing technology. Maybe there are additional modules available, or perhaps your organization has fallen off the upgrade path and a newer version would suffice, or perhaps there are complementary technologies or potential customizations that would help. Exploring all options with experts who have your interests at heart is a well-considered step before getting too far along in the process.

An investment of time, money and resources this significant should align with at least one or two, high-priority strategic goals for your organization, such as providing great customer service or improved efficiency and speed-to-market. Identifying and aligning with these initiatives will help secure the senior leadership support needed to help champion the purchase and implementation so that they get approved over other competing projects.

Ultimately all your stakeholders will need to buy into the same goals. People tend to want the latest technology modules and widgets, and business units often have different needs and agendas. The IT department is unlikely to have the same needs and wants as the marketing department. These conflicts are natural, but getting alignment at the outset is critical to such an important and impactful endeavor.

Step 2. Compile Requirements

Once you have validated the need for a new WCMS, the next step is to gather the organization's requirements that will help it achieve its goals. Some of the questions that need to be answered at the outset of the project include:

- Who will use the system, and how will they use it?

- Will it go from a handful of users in one department (centralized model) to a large number of employees in all business units (decentralized model)?

- What business functions will it support?

- What other systems will it need to interact with?

- What types of content are being managed and what channels do they support?

- What processes will the technology be supporting, and how complex are they?

- Will the organization use this opportunity to execute a full re-branding of the company's internal and/or external digital presence?

- Who are the teams who will administer within the system, and what is your strategy to interact with them?
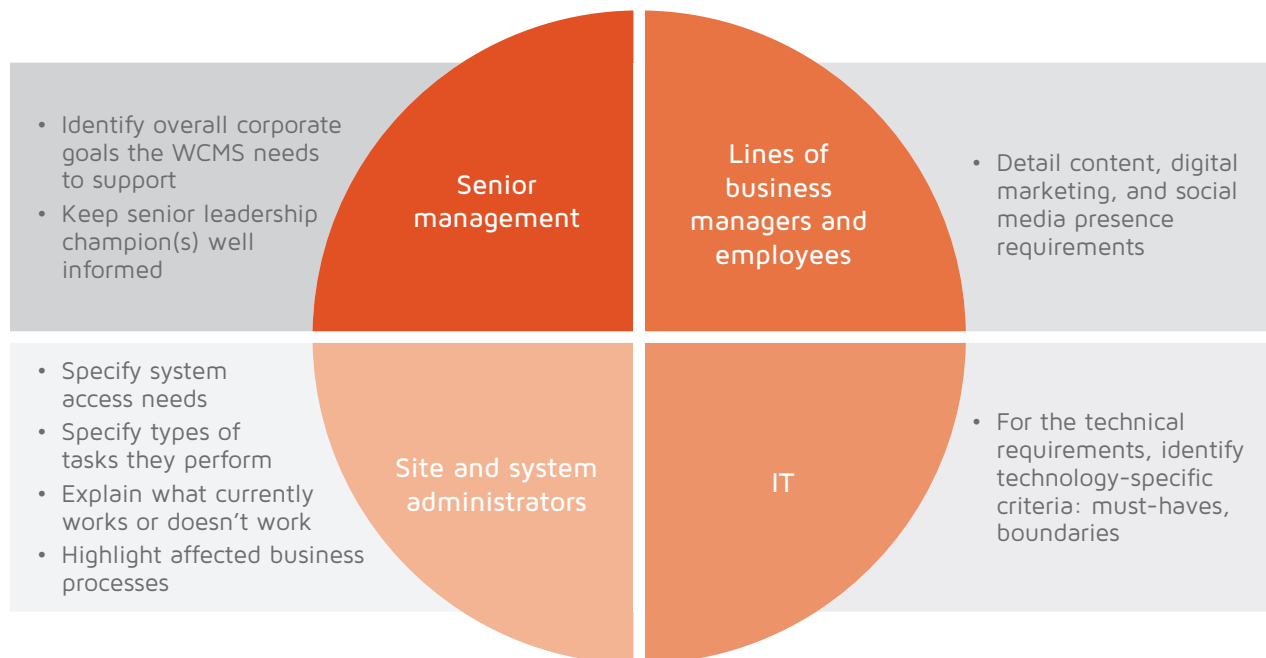
- How long will the new system take to plan, design, develop, and deploy?

To gather requirements you need to interview representatives from all affected stakeholder groups. The key is to ask what they are trying to achieve with the new system, which will then need to be translated into what that means from a WCMS perspective. You should interview a wide range of stakeholders, beyond regular users, on what success looks like for their roles.

For most companies, these stakeholders will tend to include four key groups:

Figure 1.

Stakeholder groups

- Identify overall corporate goals the WCMS needs to support
- Keep senior leadership champion(s) well informed

Senior management

Lines of business managers and employees

- Detail content, digital marketing, and social media presence requirements

- Specify system access needs
- Specify types of tasks they perform
- Explain what currently works or doesn't work
- Highlight affected business processes

Site and system administrators

IT

- For the technical requirements, identify technology-specific criteria: must-haves, boundaries

Depending on the organization, the list of stakeholders may vary significantly. For a university, stakeholders might also include faculty and students, whereas for a regional or local government, stakeholders might include elected representatives, civil servants, and citizen or community groups. Be sure to include representatives from all major stakeholder groups, and all levels of your organization.

In addition to developing the technology requirements, you should also develop a set of requirements for the service provider you plan to have guide your organization through the implementation. Requirements may include the capabilities they will need to bring to the project, such as technical prowess or creative skills, or possibly the approach they will need to take in order to successfully work with your organization. Depending on the project scope, they may also need capabilities in analytics, business and organization strategy, connecting digital and analog/offline worlds, content strategy, organizational change, user experience, and user research,

Step 3. Determine Focal Needs

Once you have compiled your list of requirements for both the technology and the service provider, the next step is to identify those that are the most relevant for the short-listing process. We call these "focal needs." The complete list of requirements is still relevant and will be used to evaluate the shortlist later in the process, but most of the requirements on the list are unlikely to help reduce the vendor choices in a meaningful way. Determining five to ten focal needs will help you to pare down the list of possible

vendors to a meaningful few. Determine a separate list of focal needs for both the technology and the service provider.

Focal needs have at least one of two characteristics:

- **They are idiosyncratic** to your organization. Every organization is unique, and the uniqueness of a requirement should translate it into being a focal need. For example, the need to support a complex multilingual environment would require robust globalization features and functionality not found in most systems.

- **They are a high priority** for your organization. As an example, most companies want a nice user experience. However, if an organization — such as a university — has a truly decentralized content management model with hundreds of users who access the system with varying frequencies, an extremely intuitive and easy-to-use interface is essential for successful adoption.

Step 4. Create a Technology Shortlist

After you have determined your organization's focal needs, you are ready to compile a list of potential vendors that can meet those needs. Ideally, you should look to identify a shortlist of three technology vendors. In order to narrow the list, look beyond what the platforms commonly share, and find the differentiators. In most cases, there is an approximate 80/20 split on common versus unique capabilities across WCMS offerings. However, while the options in the market may have very similar lists of features, it is how those

features work and the complexity of the processes that they support that differentiate them for each other.

Narrowing the list to three technology vendors can be daunting considering the more than 2000 WCMS options on the market. You can get to a more manageable list by making a few core decisions at the outset regarding your technology framework, budget, partner's strengths, and potentially engaging an external consultant.

Baseline element	Considerations
Determine the most relevant technology framework	• Is .NET, Java, or PHP best suited for your organization and the team that will support the technology? • Is a cloud or managed services option available to meet your needs? Would the organization consider these types of solutions? • Are there databases or operating systems that need to be considered? ** Input from your IT team is required here.
Confirm your budget	• Don't aim above your means for a vendor that may appear in an analyst firm report as being best-of-breed (there's no such thing!) if that vendor serves large enterprises and you are a midsize or smaller organization. • Keep in mind that an implementation partner also has to be factored into the overall budget. With many commercial systems, an estimate of three to four times the cost of the license is appropriate for most implementations, but that can vary widely, especially if open source tools are selected or if the scope of the engagement is beyond mere implementation. • Even if you have ample budget, you shouldn't exclude smaller technology players, since they might be the best fit for your needs. Over-buying can be equally as dangerous as under-buying in this significant, long-term technology investment.
Assess your partner's strengths	• Do you already have a relationship with a service provider? Is a digital agency of record in place at your organization? If you intend to use an existing partner for the implementation, then start with an examination of those systems in which they are already fluent. Only if those systems do not suitably meet your focal needs should you investigate others. • Existing relationships with service providers are highly valuable and should not be underestimated: If the organization that will implement and work with the technology is also empathetic to your organization's strategy and goals, then you should definitely look to leverage their skill set first.
Engage an external consultant	• A knowledgeable and experienced consultant will be much more likely to recommend a narrow list of solutions for you without being influenced by biases or internal pressures.

Compiling a shortlist of comparable technologies will definitely take some time and effort, especially if a third part consultant is not engaged. However, it is critically important to get it right.

Step 5. Create a Service Provider Shortlist

Organizations should consider the service provider — be it an agency, systems integrator, or other type of consultancy — in parallel with the technology vendors, if not beforehand. Often the integration team's success is gauged by their on-time and on-budget performance, but more importantly they should be evaluated on their fluency with the selected product and how well they can fulfill the organization's requirements in a way that resonates with the business, senior stakeholders, and the overall strategy of the organization. Ultimately, success is determined by whether or not the needs of the organization were met, and not just on whether the implementation was delivered on time or on budget.

Once a technology shortlist has been established, a parallel list of service providers should be developed. It is also good practice to ask each of the short-listed vendors for recommendations for three of their best service provider partners, but that is only one criteria. Each should be investigated to understand their approach and methodology, project team size, capabilities (as they align with your focal needs, product fluency, and overall 'fit'), vertical experience, etc. It is also extremely important to speak with reference customers about their experiences.

Step 6. Conduct Information Exchanges

The vendor/partner meetings, like the shortlisting of vendors and service providers, are earlier in our 8-step process than is common in WCMS technology selections, and take a different approach than a typical vendor demonstration. Traditionally, vendor demonstrations come towards the tail end of the RFP

process, after responses have been submitted, and are a dog-and-pony display of the bells and whistles the platform has to offer. However, since you have already compiled a short-list of qualified vendors by this point, the on-site information exchanges — where there is dialogue between you and your potential partners — act as a kind of in-person pre-RFP response session, allowing for a shorter, more productive RFP process after the on-site sessions are completed.

Having face-to-face sessions with the potential partners prior to the RFP gives you an opportunity to share your needs, budget, timeline, pain-points, and other concerns, in detail and with more context so that the vendors and service providers can provide a more thorough and tailored response. It also provides a final "gut check" that the RFP is thorough and encapsulates the scope of work being sought.

The on-site information exchanges also give you a forum to tell all of your stakeholders, from your organization and the service provider's organizations, what you are asking of them and each of their roles in the process. These sessions also allow the service providers to educate you on what they can accomplish for your organization, and will give you a sense of how well your teams work together.

We've found that the most effective and efficient way to conduct the vendor demonstration day is to plan for a long day:

Morning: 30 minutes with IT stakeholders, then the rest of the morning with , administrators (those who create pages).

Lunch break

Afternoon/rest of day: current or future end-users and stakeholders, with the focus on reality- based scenarios rather than canned demonstrations.

Evaluating the on-site sessions

In vendor and service provider selections, ranking is a better approach than scoring. Scoring is a common procurement tool to show that due diligence has been performed, but it has its drawbacks. One person's view of the 1 to 5 scale may be different than another, and that the view of an individual may change between the beginning of a process, before you have seen any of the technologies or met any of the potential partners, and the end, where you have seen many and met everyone.

At the end of each session/day, all stakeholders should rank each platform and the service provider team. Ranking, as in assigning first, second, and third place, rather than individual evaluators rating or scoring each on an arbitrary 1-to-5 scale, simplifies identifying the top choice team by removing the ambiguity and complexity of trying to assign a score.

Providing the selection team with a summary sheet of the agenda and purpose for the on-site information exchange and product demonstration, as well as the agreed upon focal needs, related business goals, and the t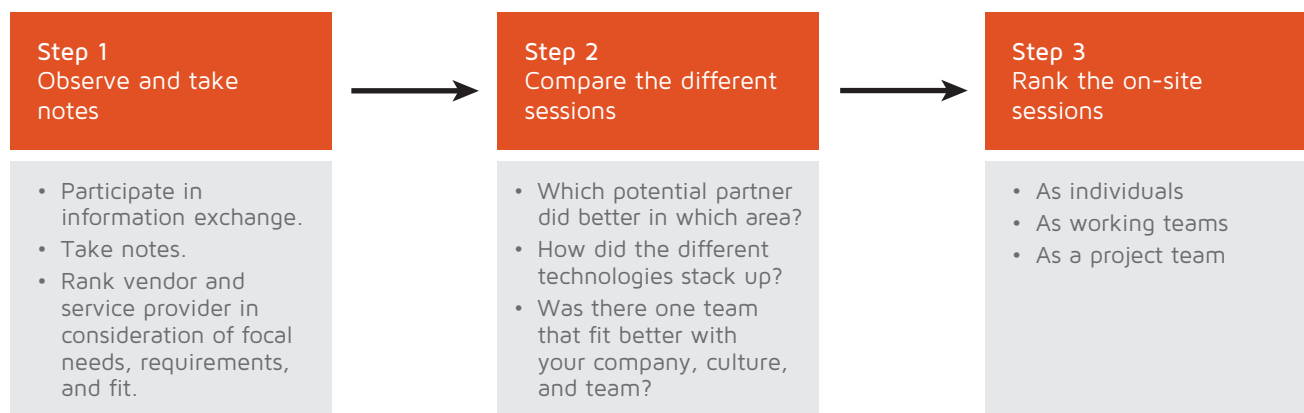ypes of functionality and competencies being sought, will help evaluators focus and provide them a common ground for the appraisals. Stakeholders should rank each platform and/or partner team on the topics of the day that are most relevant to them. There is not much point in asking the copy writer to rank a potential partner's technical integration capabilities if they don't have a technical background, but by all means let team members provide the input outside of their typical scope if they have relevant knowledge and are keen to contribute.

Once the rankings are in, you may want to take it a step further and weight individual or team ranking for the different areas of evaluation based on the level of pertinence or impact of those areas on what the group or individual does. For example, content contributors' and editors' rankings might receive more consideration on a platform's usability and partner's content strategic approach. In comparison, system architects' opinions would be more heavily weighted regarding the platform's technical capabilities and the potential partners' technical capabilities.

Ranking the demonstration teams should be a three-step process:

Figure 2.

Ranking demonstration teams

Step 1
Observe and take notes

- Participate in information exchange.
- Take notes.
- Rank vendor and service provider in consideration of focal needs, requirements, and fit.

Step 2
Compare the different sessions

- Which potential partner did better in which area?
- How did the different technologies stack up?
- Was there one team that fit better with your company, culture, and team?

Step 3
Rank the on-site sessions

- As individuals
- As working teams
- As a project team

Once the evaluations have been completed there should be a first, second, and third place for each of the technology vendors and service providers. These rankings can then act as a reference point to have a conversation with your team on the identified preferences based on the different areas of evaluation. Keep in mind that just because a vendor and servicer provider are ranked 1st overall, doesn't mean that you have to pick them. How they excelled over another team in a certain area may be the prompt for more questions to be asked of the other two teams to ensure you have a clear understanding of the differences.

Step 7. Conduct the Request for Proposal (RFP) Process

After the Information exchanges are completed, you are ready to conduct the RFP process.

Most companies jump to the RFP process right away, before holding onsite discussions and demonstrations. However, doing an RFP too early on is a big mistake and a waste of time for everyone involved. If the RFP is conducted before the information exchange, it is likely that neither the service providers nor the technology vendors have enough information about your organization, its needs, or your budget to effectively respond. If they respond at all, they will blindly answer your checklist of questions and provide you with a cost estimate that is meaningless since they do not know enough to provide you with an accurate proposal.

Much has been written about how to develop an RFP based on scenarios and to avoid the "checklist" approach. We agree wholeheartedly: it is important to do your homework first and be as informed as possible both about your needs as well as their capabilities to understand what it is that you really want to ask the shortlist of vendor/service provider teams. This

approach will get you meaningful answers and create a collaborative environment for both you and your prospective partners — after all, the RFP process should be viewed as an early step to a long, mutually beneficial partnership. Putting the RFP process at this stage of the process will eliminate the 60+-page cut-and-paste RFP responses that the vendors do not have time or desire to write and that you have no time to read. By running the RFP towards the end of the selection process, you will be familiar with the vendors following the Information Exchange, and they will know enough about your organization and your needs to provide you with the best possible proposal.

Step 8. Hold a Proof of Concept Period

After you have received RFP responses and identified the preferred the vendor/service provider team to implement your new WCMS, we suggest you then schedule a paid Proof of Concept (POC) for your stakeholders to test that the new technology works in your environment the way it did in the demonstration period.

During the POC, the service providers should be able to show you how the system works for you and your specific needs, and to give you a more informed cost proposal for the scope of work at hand. A small financial investment and two weeks of time will allow the buyer to assess the appropriateness and the "fit" of the services partner, as well as provide them an opportunity to gather the knowledge they need to more accurately forecast and finalize the scope of work and cost for the project.

This approach can also help answer some of the many questions you will have. Does the team ask good questions? Do they have the right answers and deliverables? This is also the perfect time to assess

how well the WCMS addresses your focal needs, as well as how the actual implementation team plans to implement the technology. Keep in mind that this is not a full implementation of the technology, but more so a test to ensure it can connect with the necessary systems and solutions already in place within your IT landscape.

Proof of concept versus Bake-Off

We recommend a PoC with one technology vendor and one service provider, rather than a Bake-Off between multiple of each.

A PoC and a «Bake-Off» are not the same thing, although many people use the terms interchangeably. A Bake-Off pits two or more technology vendors against each other. It is aimed at providing a side-by-side comparison of their products and services, with the intent on selecting a "winner" as a final step in a selection process. However, bake-offs are flawed for a number of reasons:

- They are often a decision-making procrastination tactic disguised as a competition to find "the best". There is no best, and the stakeholders usually have a sense of which finalist they prefer anyway. A bake-off doesn't change their minds.

- They usually focus more on features and functions than on outcomes. It is rare that a product, when combined with services, cannot do something.

- They devalue the finalists by putting them in a cage-match of sorts. This is not the way to start a collaborative partnership.

- Finally, for all the reasons above and many more, many vendors will not participate in bake-offs, and therefore buyers risk losing potential best-fit options for reasons that have nothing to do with their capabilities.

In comparison, a PoC provides evidence that the preferred technology vendor and/or service provider can successfully execute project-related tasks. In the case of a technology vendor, this short, hands-on trial period proves that the proposed platform can integrate with existing infrastructure as well as deliver the necessary functionality. A service provider PoC usually lasts a little bit longer and allows the teams to "test the waters" for fit, as well as to set parameters and finalize the scope of work for the project. A PoC provides assurance that the identified partners will be able to meet all requirements for the design, development, and execution of the new solution, be it technical, creative, or strategic.

Summary

Today's industry-leading WCMS solutions offer far more than just content management. They continue to evolve towards becoming complete integrated e-business platforms, offering capabilities that support all aspects of business including marketing, collaboration with customers, channel partners and employees, customer support, and online fulfillment transactions.

In addition, system integration with other enterprise applications such as CRM and ERP systems further generates business value from a WCMS solution. However, to fully realize the value offered by these advanced solutions, a more comprehensive analysis of both business needs and the capabilities of the WCMS solution are essential.

Further Reading

For help on identifying the right service provider for your implementation, consult our Guides to Service Providers in Web Content and Customer Experience Management (free sample for download, payment required for full versions):

- Guide to Service Providers for Web Content and Customer Experience Management, North American Edition (2014)

- Guide to Service Providers for Web Content and Customer Experience Management, Europe edition (2014)

For more information or if you would like to discuss your project needs with a professional and experienced WCMS analyst, contact Digital Clarity Group at info@digitalclaritygroup.com.

About DCG

Digital Clarity Group

Digital Clarity Group is a research-based advisory firm focused on the content, technologies, and practices that drive world-class customer experience. Global organizations depend on our insight, reports, and consulting services to help them turn digital disruption into digital advantage. As analysts, we cover the customer experience management (CEM) footprint – those organizational capabilities and competencies that impact the experience delivered to customers and prospects. In our view, the CEM footprint overlays content management, marketing automation, e-commerce, social media management, collaboration, customer relationship management, localization, and search. As consultants, we believe that education and advice leading to successful CEM is only possible by actively engaging with all participants in the CEM solutions ecosystem. In keeping with this philosophy, we work with enterprise adopters of CEM solutions, technology vendors that develop and market CEM systems and tools, and service providers who implement solutions, including systems integrators and digital agencies. For more information about DCG, visit www.digitalclaritygroup.com or email info@digitalclaritygroup.com.

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