

# Five Crucial Lessons Learned In Content Management System Selections

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# Executive Summary


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The road to any new business initiative will always include obstacles, speedbumps and hazards, but unless you are the first one to travel the road, others have encountered the challenges ahead, and your organization can learn from their experience. One of the most important actions an organization can take when tackling a new initiative is to learn how to avoid the gotchas — know the pitfalls, the lessons others have learned, and the best practices derived from the experiences of those who have done it successfully (and not so successfully).

Learning from others is particularly important when selecting new technology. Because companies don't do this every day, they lack the skill sets, knowledge base, and experience to truly understand what a selection project entails. The challenges are even greater when it comes to content management system (CMS) selections because hundreds of options characterize today's CMS landscape.

This report examines three common pitfalls and five key lessons learned by organizations that have conducted a CMS selection. Digital Clarity Group surfaced these and their accompanying best practices by talking with COOs, CIOs, marketing executives, brand managers, IT managers, CMS managers, and other business and IT professionals at fourteen organizations across a range of sizes, industry sectors (including government) and geographic regions. We asked questions like:

- How did you identify the CMS requirements?
- Who was involved in the requirements gathering and vendor selection?
- What were the steps in the process?
- How did you evaluate the vendors?
- Was a consultant or integrator also involved before and/or after selection?
- How did you get user and management buy-in?
- How long did the selection process take?
- Why did you choose your vendor and service provider?
- Is the vendor's product a good match? Why?
- Do you consider the project a success?
- Does the organization see it as a success?
- What would you do differently if you could do it over again?
- What would you recommend to others starting down this path?



From analyzing the responses to these questions, we uncovered five crucial lessons learned which should be applied to any CMS selection and will help to lower risk, speed the decision-making process, and better align the project with business strategy and objectives.

## **CMS Selection Process Lessons Learned**

**Lesson 1:** Build a cross-functional CMS team of key stakeholders.

**Lesson 2:** Communicate strategically when making the business case.

**Lesson 3:** Cast a wide net when identifying CMS and business requirements.

**Lesson 4:** Use a consultant for the selection process, and a service provider for the implementation.

**Lesson 5:** Follow a well-understood, widely communicated, agreed upon process for selecting vendors.

# Lessons Learned Help Teams Avoid Three Big Pitfalls

Every project has its share of issues and conflict, but three gaping pitfalls in particular can break a CMS selection project. As with the lessons learned, these pitfalls surfaced repeatedly during our interviews with project team leaders, key stakeholders and executive champions:

- **Selecting the CMS product based on features/functions alone.** Nearly every person we interviewed identified this pitfall, and almost every project team fell into this trap. Successful project teams caught their mistake early and refocused their requirements-gathering efforts to include more-strategic business questions. Those who didn't see the problem until much later in the process failed by either completely stopping the project indefinitely, or stopping the project and restarting from the beginning. Those that didn't discover their mistake until very late in the process, but kept going, now live with an inadequate system that doesn't meet their business requirements and already needs replacing.

Three scenarios are most likely to set the feature/function trap: the project team is staffed predominately with IT staff or is too technically oriented to see the need for


business-related questioning; the team is drawn from lower levels of the organization and either can't put executive inputs into perspective or only interviews lower level stakeholders; or the team doesn't have enough senior executive sponsorship and oversight to envision the big picture. Building a multidisciplinary team with experienced members is a key way to avoid this pitfall.

- **Dealing with persistent conflict between business and IT.** Thirty-five percent of the projects described in our research indicated that strife between IT and the business over CMS selection was a significant obstacle. At first blush, this seems like the perennial problem that plagues most technology projects, but some of the conflict in these projects rises above the typical IT-business fracas. For example, in one situation, everyone on the project team (both business and IT) resigned, leaving the project in limbo for almost three years. In another organization, multiple CIOs resigned in succession because of deep conflicts with the business that came to a head over the CMS vendor selection. And there's the project that was stopped for two years while the organization tried to overcome its internal strife.

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“ We needed to have our decision making figured out before beginning the project. Doing it in the middle of the project is really hard. WCM touches everyone in the organization, but it isn't unique. The operations manager will own it, although marketing thinks they own it and IT might want to own it. But we designed the CMS to be run by operations from the beginning of the project and this is how it is going to be managed. ”

— COO, a large non-profit



Internal conflict is not an easy problem to overcome. If the company or government agency has organizational change management staff, enlisting their assistance would be wise, but many organizations lack those skill sets. Many of the organizations we interviewed with serious conflict issues already used CMS consultants. But unless those consultants are specifically trained in conflict resolution and leading organizational change, it's too much to expect them to be change management experts in addition to facilitating the CMS selection.

- **Failing to establish clear lines of responsibility by appointing a single executive decision maker.** This is the biggest obstacle we uncovered, and is often the underlying factor behind others, both large and small. In many instances, the damaging conflict between IT and the business could have been mitigated by a single executive decision maker responsible for keeping the project from going awry by making hard choices and difficult calls. So if, for example, IT declares that the only product worth considering is SharePoint, and the CIO gives an ultimatum to other stakeholders, the executive decision maker can review that

decision and make the call on whether to consider other products or proceed with SharePoint, which keeps the project on track.

A wise chief operating officer (COO), and former CIO, told us that the need for clear lines for decision making was the single most important lesson he learned during CMS selection. He knew before the project began that this was a danger, and was the executive sponsor, but failed to take action before the project kick-off. Mid-way through the project, issues over decision-making authority surfaced, requiring him to work extra hard to turn the situation around.

To avoid this pitfall, establish clear lines of reporting for the selection project. Take a close look at the CMS project team and where/to whom individual members report, and draw lines that ensure that everyone reports to the CMS project manager and the executive decision maker in the context of the selection project. If lines are blurred or crossed such that team members are accountable to their everyday managers in different departments for this project, the initiative runs the risk of major conflict between departments and/or organizational confusion about who makes the final decisions.

# Lessons Learned By Experienced Practitioners

In addition to the three major pitfalls, our research uncovered five crucial lessons learned by CMS selection teams — often in hindsight. By understanding the experiences of their peers, project teams just getting started can identify best practices to guide them through the selection process.

## Lesson 1: Build a cross-functional CMS team of key stakeholders.

When building the project team, create layers of individuals to get the day-to-day work done and collaborate in decision-making (see Figure 1).

At its core, the team must include people who are dedicated to the project on a full- or at least part-time basis. The core must include business analysts, business managers or knowledgeable people from the primary stakeholders, who are often in marketing. Because CMS solutions are technology platforms, and IT is often required to manage and operate the system (or at least weigh in on security and privacy), IT should be part of the core team. As one project manager observed, “Always involve the IT team, even if they aren’t going to manage the website. At a minimum, they usually manage the underlying platforms, such as servers, network and infrastructure.”

Don’t forget that stakeholders could also come from customer-centric groups like sales, partner channels, e-commerce, customer service or maintenance —

Figure 1.

### Building a Project Team

#### Core members of the team often include:

- Project manager
- Sales, marketing and LOB staff
- Web specialist
- IT infrastructure staff
- CMS consultant

#### Expanded team could include:

- Security and privacy experts
- Social experts
- Commerce and branding experts

#### Decision makers usually include:

- VPs of Marketing and Marketing Communications
- Line of business VPs
- CIO
- CFO, COO and CEO

particularly if the CMS solution will support the entire firm, not just marketing. To preserve a manageable team size, those people may need to be in the next layer. Keep the core team small — around five to seven individuals — because too many people could encumber the decision-making process.

“ Don’t even think about looking at technology or partners until you know what you need to fix. Maybe your processes are broken, or you need training. Get stakeholders involved; get individuals who understand the needs to collect requirements. Use good business analysts who can elicit the real requirements. Find someone who can draw out the underlying issues — the real problems. ”

— IT manager, a major bank

Then, going out a layer, bring others into the larger project team as advisors or internal experts. For example, security and privacy experts can play a key role. The expanded team could use advice from experts in fields like branding, social tools and communications. Look deeply within stakeholders in the business functions, even examining more closely distinct activities in marketing, such as online and direct marketing or advertising. Also, the team may benefit from the input of legal, procurement or contracting experts upon examination of factors like the financial and operational strengths and weaknesses of the vendors and service providers under consideration.

Individuals recruited into the outer layer are not dedicated to the core project team, but are important resources for the team to tap into and should be considered part of the larger project team.

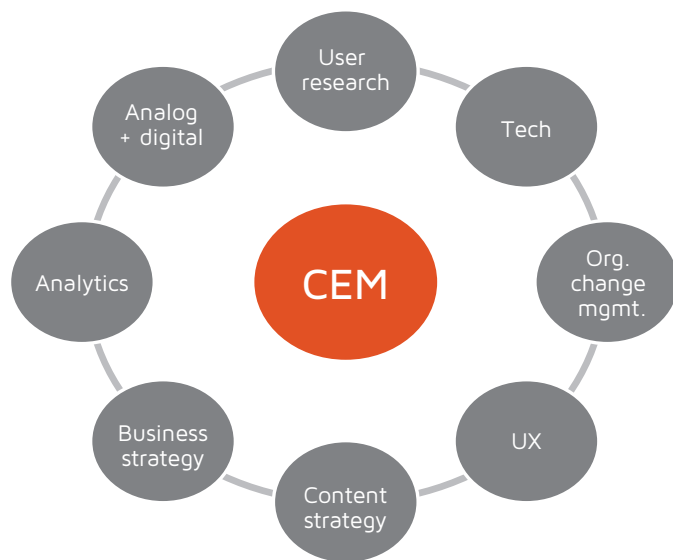
Incorporating business, marketing and technology influencers and experts into the expanded project team gives more people a stake in the success of the project, which eases organizational change management. One CMS project manager would advise new project team managers to “include a key influencer who may be among the skeptics regarding the new CMS in order to neutralize negativity at the very start of the project.” And finally, the outer layer includes the executive decision-makers and influencers who can either stop the project from proceeding or empower the project team to move ahead and who control the budget approval. This includes the senior management team that reports to the CEO or COO, and could be as far afield as the HR executive or as core to project approval as

the CFO. (Keeping in mind the typical conflicts we covered as pitfalls, including the HR exec could be fortuitous.)

In building the project team, it’s important to think broadly about the skills required to implement the CMS solution and also integrate it into the organization’s existing systems and processes. Often projects go well beyond core CMS skills. Figure 2 shows the core competencies routinely required for customer experience management, which is often the context for beginning a CMS selection project. In addition to the competencies shown in Figure 2, it’s also important for someone on the project team to understand how the CMS project and customer experience management fit into core business processes.

Figure 2.

### The Eight Core Competencies



“ Keep it simple; use sound bites of information so that others can repeat the message and story easily and accurately. ”

— Director of Internet Services, an international non-profit

## Lesson 2: Communicate strategically when making the business case.

Getting to the actual CMS selection requires the project team to successfully clear the executive team's approval hurdle. Why is it that some teams seem to do this effortlessly, while others struggle and must appear before the executive team multiple times before getting to the goal? Invariably, it's because successful teams communicate strategically when making the business case. The successful project managers we interviewed made a simple and clear business case by putting themselves in the position of those who will finance the project — the investors in the solution. They present the project in non-technical terms that make sense to executives and paint a picture from a business perspective. Successful presentations are as detailed as needed and as clear as possible on the financial investment required, but always start with the business strategy and how the project advances the business. For example, one company had new leadership at the

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“ Focus on what you need. Tech isn't the most important. When the system is in place, what can the customer use it for? Companies need to think more about the processes and less about the technology. ”

— Director of Technology, insurance

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helm, so the project manager pointed out how the new system would support the new management team's goals.

One CMS project manager (from IT) worked with the firm's internal strategic communications team to hone the project team's executive presentation. He learned several lessons critical to garnering executive team support:

- Align the CMS business case across all the business stakeholders' needs.
- Represent departmental interests as best as possible without diluting the key message.
- Communicate less about the tool and more about the organization's long term strategy.
- Tailor the message to each group, if you are required to pitch to different groups with different points of view.
- Ask executives for exactly what the team will need from them and find out what their commitment would be, should they approve.
- Include wireframes and imagery depicting elements of the system design in order to make the solution more tangible.

## Lesson 3: Cast a wide net when identifying CMS and business requirements.

How do CMS project teams develop a, business-oriented presentation that's strong enough to sway the firm's executive team? It's by doing a great job early in the project at surfacing requirements in talks


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“ Understand what you want, get all the stakeholders involved, get it signed off, get total agreement so that later you don't have unhappy people. This is essential. ”

— CMS project manager, a European consulting firm

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with business and technology stakeholders. Inexperienced project teams that are staffed by workers in junior positions find it difficult, if not impossible, to look at CMS projects broadly, because that isn't their world view in the organization. Instead, they gravitate toward the concrete, which, in this case, is typically a feature/function matchup with the business needs. Project teams of junior level employees who, in turn, interview junior level stakeholders, end up deriving vastly different requirements than a more seasoned team talking with business managers would produce. That's why it's so important to staff the core team appropriately and then cast a wide net when identifying CMS and business requirements, going beyond the technical features and functions needed. These interviews lay the groundwork for the business case that is the key to final executive sign-off and support.

Besides securing executive buy-in and preventing the CMS selection team from choosing the wrong product, casting a wide net to gather user requirements has several other benefits, including:

- Building user support and buy-in for the project
- Uncovering the skills that will be needed from the implementation service provider and other internal resources during next stages of the project
- Keeping the selection team from getting the wrong configuration (e.g., centralized/decentralized, globalization/localization)
- Ensuring that all the requirements are surfaced, not just a subset

These benefits reinforce the need to look at a wide scope of business and technical requirements when selecting a CMS solution.

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“ Do one thing at a time. Don't underestimate the learning curve. There's a significant ramp up. ”

— Marketing manager, government agency

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#### **Lesson 4: Engage outside experts for the selection process, and use a service provider for the implementation.**

Most CMS implementations require significantly more than basic WCM software. Even if the level of customization is minimal, some amount of development is usually necessary to deliver on the business requirements. Many companies we talked with had developed portals for certain types of customers or for channel partners. Service providers can offer development and specific implementation skills that the CMS vendor may not provide, which is one reason they are so essential to CMS selections and deployments.


Almost all of the companies we talked with used consultants or systems integrators to help throughout the entire selection process, and chose CMS vendors that were contractually teamed with service providers. In one or two cases, the service

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“ This process would not have succeeded without a partner. We wouldn't have known the right questions. We would have hired the wrong company to help us and we would have picked the wrong vendor. ”

— CMS project manager, a global medical devices manufacturer

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providers were digital agencies, but the majority were systems integrators that had working partnerships with the CMS vendors. In most instances, the service provider was the prime vendor, and the CMS vendor was subcontracted to the service provider. In a few situations, the service provider and CMS vendor were both contracted directly with the buying organization. In either case, the purpose of using a service partner was to lower overall project risk during the implementation phase.

One CMS project manager offered this lesson learned: Fully understand the detail needed in each build. If the project team had realized how much work was required, they would have chunked out the development instead of using a “big bang” approach. According to this project leader, “we would have been more nimble, better able to consider the interdependencies, show more interim progress, better use data to solve problems, keep our education going throughout the process, and keep up with changes in best practices and trends during development.” A service provider could have provided this insight based on prior experiences.

Selecting a services partner alongside the CMS vendor is crucial if the project team lacks core CMS skills and experience, or if the project team plans extensive custom development. Most IT shops, and certainly most marketing organizations, do not have the requisite skills creating web sites, building web templates, customizing portals, developing personalization and supporting commerce servers. In

fact, most companies we interviewed did not have strong website skills when they first started down the CMS path: it was a totally new technology to them.

Virtually every company we talked with selected consultants and service partners to help with the CMS implementation. But keep in mind that service providers aren’t silver bullets — some of the companies we interviewed had less than successful projects even though they used one or more service providers. That’s why it’s important to select a consultancy or systems integrator that has a lot of experience with the platform.

### **Lesson 5: Base vendor selection on a well-understood, widely communicated, and agreed upon process.**


While following a well-understood and well-communicated process is no guarantee that the project will have a successful outcome (i.e., the solution selected is well aligned with business needs and accepted by stakeholders), it is almost a certainty that not following a formal process will lead to problems, pitfalls and more unfortunate lessons learned. One manager reported that setting expectations by communicating the process at the start and the achieved milestones along the way was key to reducing friction through a selection process.

Almost all the organizations we interviewed followed a similar process for evaluating the CMS vendors and implementation service providers, beginning by formally engaging with the vendors. In some cases,

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“ The product we selected was a platform from a chosen vendor, teamed with a trusted partner. It could be customized to support bespoke applications; it was a stable platform for building applications. We are very happy with it. ”

— CMS project manager, a European consulting firm



the project team issued a request for proposal (RFP), while in other instances they sent vendors and service providers a requirements document in the form of a request for information (RFI). Almost all of them sent the solicitation to four to five vendors and service providers, narrowed the list down to one or two vendors, and finally performed a more detailed evaluation using selection criteria and weightings. Because of the work involved, several of the CMS project managers wished they had streamlined this approach and cautioned against issuing the RFI or RFP to too many vendors.

Most CMS project managers reported that the evaluation phase of selection took between four and six weeks, assuming the requirements-gathering process was well executed. Usually project teams required vendors to provide proposals, presentations, in-depth demos and a look “behind the scenes” at the technology. To get more insights from stakeholders and to build user buy-in, many project teams also invited additional people to sit in on project-related and vendor presentations. Also, many key stakeholders were asked to be involved in the vendor’s proof-of-concept (POC).

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“ We had a very thorough, very technical RFP with 140 pages. We had a range of quotes from \$200K to \$2.6M from a total of 10 vendors. The vendor and service provider we selected was not one we initially considered but the pricing and platform was a good combination. ”

— Director of Technology, insurance

# A Tale of Two Companies

In our research, we encountered two organizations at the opposite ends of the spectrum when it comes to applying or learning lessons, as the case may be. One business, which specializes in making organizations more effective through best practices, training and methodologies, was a perfect model for applying the lessons learned and best practices in CMS selection projects. The other, a non-profit in the medical research field, truly excelled at stepping into the pitfalls that can plague a project team and then encountered them over and over again during a six year endeavor to select a CMS. The contrast between the two organizations is so great that it provides a clear way to see what worked so well in one instance and failed so spectacularly in the other situation.

## A Textbook Example of Lessons Learned and Best Practices in Action

The driving business reason for this organization to launch a CMS project was the need for a new website and two sales-related portals. To get started, the company selected a consultancy to join the project team and help with the selection project. The project team then gathered requirements by talking with all stakeholders and prioritizing their requirements. While the project team tried to understand which features in the CMS platform mattered most, the team members also placed a high priority on understanding the overarching strategy that drove the business requirements.

The composition of this project team was vitally important to the project's overall success. Specifically, the CMS platform requirements were evaluated by the business, which mostly comprised marketing and groups within marketing, like the e-mail communications team. Concurrently, the IT team looked at underlying platforms, like security, servers and infrastructure. Plus, the project team solicited input from a wider business audience drawn from groups that sell products via the website. And finally, the senior management team got involved in the financial decision.

Once the requirements were gathered, the project team issued an RFP to five CMS platform vendors. The formal evaluation, which was based on established selection criteria, required the vendors to make proposals, presentations and in-depth demos, and to provide a look behind the scenes. Because the stakeholders had agreed upon the requirements, and the methodology was clearly delineated, the selection process was straightforward, taking about four to six weeks. After that, the first custom portal project was finished in eight weeks.

This project is impressive for many reasons, including: The project team worked as a multidisciplinary team with a shared objective, the requirements gathering and selection processes were streamlined, the CMS project became a platform for custom development supporting strategic customer and sales channel

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“ Understand what you want, get all the stakeholders involved, get it signed off, get total agreement so that later you don't have unhappy people. This is essential. Next, find people who can deliver against the needs, either internally or through partners. Then you measure their success against how well they met the requirements. ”

— CMS project manager, a European consulting firm



portals and the entire project was completed in a reasonable time period.

One can only surmise that this organization's culture and mission — which is to promote global best practices — heavily informed their CMS selection process. This project team's ability to involve the right stakeholders, interview them in-depth but quickly, and move to a straightforward but formal evaluation process clearly reflects the company's overall corporate mission and culture. The importance of organizational culture in the success of initiatives like these is also apparent, and provides a stark contrast to this one, in our second case study.

## What Can Go Wrong Will Go Wrong

In contrast to the above successful CMS selection, a medical research non-profit seeking to select its CMS has hit just about every pitfall imaginable since starting to implement a CMS in 2009. From the very beginning, the low-level project team focused on creating a feature list to replace an older WCM system instead of looking at more strategic business requirements. Compounding this error, they selected the system that IT wanted even though their service provider advised against it.

After abandoning the first CMS two years later, the company launched a new project in 2012 to re-examine business needs and rebrand the website. This time the project team used consultants to identify business requirements and evaluate vendors. But despite these precautions, IT kept returning to the old solution as the preferred product. Trying to break the cycle, the project

decision-makers hired two different consultants, but remained mired in organizational conflict. To restart the project, the project team reissued the RFP multiple times, re-examined vendors numerous times, plus re-staffed the project team several times to change the outcome. As one consultant observed, “it was a crazy, dysfunctional place.”


The problem? IT was dissatisfied with all the vendors and service providers that the project team selected, but also had significant clout, being both a business stakeholder and a support organization. Feelings ran high because IT thought the business stakeholders' preferred solution was too costly and that SharePoint was a better solution. The level of discord reached into the executive ranks and produced fallout; eventually several CIOs resigned in succession and the project manager took early retirement. Finally, the project appears to have gotten on track and the new CMS should go live in mid-2015.

The seeds of discord in this selection project probably lie in this non-profit's culture. While medical research environments, as in our first case study, are methodical, well-documented and controlled, non-profits often rely on highly decentralized decision-making without clear lines of control, especially when initiatives span departments. In this project, IT was a major business owner that provided the technology experts, so it quickly dominated sales and marketing, the other key business stakeholder. Other departments, like development, education and communication, were highly dependent on the website to raise funds, deliver training products, and communicate with external parties but couldn't

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“IT was more of a hindrance than a help. They were looking at CMS as a back-end system. They didn't realize the marketing need.”

— CMS project manager, a medical research non-profit



offset IT's voice in the project. Plus, trying to forge a consensus across this many stakeholders in a decentralized model without a culture of strong decision-making is rife with problems, especially given a powerful IT department and a low-level

project team. This project also illustrates that once conflict takes hold, it is almost impossible for CMS consultants to resolve and is best left for an organizational change management consultant.



# Final Word: Best Practices for Success

Lessons learned and best practices are integrally linked. Lessons learned are gleaned, sometimes painfully, when project teams look at their experiences in hindsight. As always, it's much easier to look in the rear view mirror than to look forward at the open highway and figure out a future direction. That's where best practices come in. They are the accumulated wisdom from organizations that have lived through the lessons learned and have come out the wiser for doing so. Their experiences can be adopted by other organizations and repeated with predictable results.

From Digital Clarity Group's perspective, the research that led to this report has uncovered a wealth of peer-to-peer insight that will be beneficial to teams embarking on a CMS and service provider selection. Based upon our own experience as analysts and consultants, we close with some advice of our own.

1. Avoid “service provider afterthought syndrome” — that practice of treating the choice of service provider as a secondary consideration. We have tried to emphasize the importance of service providers throughout

these lessons learned and in the two case studies. Don't underestimate the positive impact that the right partner will have on the value that your CMS solution delivers to the business — make your choice of consultants and service providers early and bring them in early in the project.

2. Leverage the knowledge that the CMS vendors can bring to the table. In most cases, they have a vested interest in building a base of happy customers who are eager to talk of their success with the technology. Reach out to a few likely candidates as the list gets whittled down, and be sure to ask for and call their references. Ask their customers about their selection processes, not just the technology and how it's performed for them.
3. Make sure that the project budget includes time and money for conferences and industry events. Reading about lessons learned is one thing. The opportunity to interact with others who have been-there-done-that with CMS selections will be invaluable.



# Endnotes

1. For a more in-depth discussion of the skills needed to support a customer experience management project, see the Customer Experience Management Imperative.





# 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](http://www.digitalclaritygroup.com) or email [info@digitalclaritygroup.com](mailto:info@digitalclaritygroup.com).

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