The Ultimate Guide to Selecting a Web Content Management System

An 8-step guide to successful WCMS selection

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Introduction

The 8-Step Process

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Summary

About Digital Clarity Group
In today's content-driven online environment, the ability to effectively deliver accurate, relevant information in the right format, and in a timely fashion on the web is imperative for any successful online strategy. Finding the ‘best-fit’ Web Content Management System (WCMS) for your public, intranet and/or extranet websites is one of the first steps on that path to success.

There are more than two thousand WCMS solutions to choose from, each varying in price, design, and functionality. Many systems provide much more than just content management capabilities. There is also the consideration of whom you will engage to implement the new technology; selecting a service provider is as important, if not more so, than selecting the technology itself. Making the wrong decision in either of these areas can have dire consequences of a sub-par implementation that is over-budget, past the projected timeline, and which delivers results far below expectations. Or worse, an implementation that never sees a site go live.

With so many WCMS choices available, how does an organization select one that meets their business and IT objectives? Simple ... a well planned and executed evaluation process.

The following eight steps outline the WCMS selection process that Digital Clarity Group has developed and refined over the 100+ technology selection projects our analysts have conducted. Our 8-step guide will help you focus on the most important aspects of the selection: identifying focal needs to pare down the list of options to a meaningful few, and finding the right service provider to guide you through to a successful implementation.
1. Validate the Need

The first step is to differentiate between the needs and wants in regard to a WCMS. While both are important to consider, the selection of a new WCMS has to first address the identified needs. Why is a new system being considered? Is it part of a new digital marketing strategy? Or perhaps it is being driven by internal communications? This large of an investment should align with at least one, if not two, high-priority organizational goals. This will help to secure senior leadership support and the required champion to help move the project forward in light of competing interests for limited resources.

Get all your stakeholders to buy into the same goal – the concept of a new WCMS. This is particularly important as it applies to the communication/marketing and IT departments, as these teams often have differing needs and agendas as they relate to web technology. Today’s WCMS goes way beyond the basic functionality of managing content to now often include elements such as: multi-media presentation, user interaction, personalization, globalization, and many other aspects. And while everybody wants the latest technology modules and widgets, you should think about the main need for your WCMS. Sometimes the system may not need to change – maybe just the content does.

Look to your existing CMS system to help you understand what is needed. Most will start by considering what is lacking from the current system, which is important to understand, but it is equally important to identify what is working and therefore needs to be included in the new system.

One of the things to be mindful of with a new WCMS solution is that it can take a company up to two full years to get back to a point where they currently are with the existing system in terms of usability, familiarity, growth, etc. – because of that, you want to make sure that a new solution is exactly what you need.

Helpful Tip: Make sure your IT and marketing / communication departments are on the same page, and work together on the process of selecting a WCMS.

Gather all key stakeholders and take a look at the problem statement at hand and ask the most important question: Why are we looking for a new WCMS platform?
2. Compile Requirements

Since every organization is unique, their WCMS needs will be as well. This stage is about understanding the organization’s requirements for the system in light of the goal(s) it is meant to help achieve. Who will leverage the system, and in what way? What business functions will it support? What other systems will it need to interact with? What processes will be affected by its implementation? These are just some of the questions that need to be answered at the outset of the project.

Branding should also be considered; is this an opportunity to execute a full re-branding of the company’s internal and/or external web presence?

Understanding these requirements will help, when the time comes, to hone in on those WCMSs that can best meet the identified needs.

Dive into introspective mode and talk to all your key stakeholder groups.

Executive Tip: Listen to everyone in your organization. Don’t forget to make a list of future needs, in order to ensure the selected WCMS can expand to meet those needs.

Executive: To identify the overall corporate goals that the WCMS needs to accomplish. Also, make sure that the identified senior leadership champion(s) is well informed during the entire process, has/have bought into the need for a new WCMS solution, as well as the associated costs of purchasing and deploying a new system.

IT Department: For the technical requirements (including the programming language).

Lines of Business: For content, digital marketing, and a social media presence requirements.

Site and System Administrators: To understand how they access the systems, the types of tasks they execute, what works well and what doesn’t. It is also important to understand the business processes associated with content creation and maintenance.
Interview them all – the key is to ask what they are trying to achieve with the new system, which then needs to be translated into what that means in the WCMS world.

Also think about how long the new system will take to plan, design, develop and deploy – what are the realistic timelines.

3. **Determine Focal Needs:**

One of the main things about this crucial process of selecting a WCMS is pulling together a full list of the requirements and then narrowing the list down to identify those needs that are the most distinguishing – called *focal needs*.

It is this shorter list of *focal needs* that will help pare down the list of possible vendors that can meet your organization’s technology selection criteria.

So what are these *focal needs*? There are two characteristics of a focal need:

1. **They are idiosyncratic to the organization:** Each organization is different, and it is these unique elements that often translate into being a focal need. For example the need to support 25 languages simultaneously would require robust globalization features and functionality.

2. **List of high priorities:** If a company has a truly decentralized content management model with literally hundreds of users accessing the system only once every couple of months, an extremely intuitive and easy to use interface would be critical to successful adoption.
4. Shortlist Technology:

Once focal needs are determined, then it is time to identify a potential list of vendors that can meet those needs. Organizations should look beyond what WCMS platforms can have in common, and find the differentiators. In most cases there is an approximate 30/70 split on common versus unique elements within a WCMS offering. And while they may have a very similar list of features, it is how those features work that can make the difference between a successful or failed WCMS project deployment.

Narrowing the list (we recommend a shortlist of three) can be daunting with so many options, but by applying filters on a few core areas, a manageable list of vendor options can be derived.

Filter for Relevant Technologies: .NET/Java/PHP – see which one is best suited for your organization and the team that will support the technology. It is good to be in sync with your IT team throughout the selection and implementation process.

Filter for your Budget: Consider your budget before jumping onto any technology option. Keep in mind that an implementation partner also has to be factored into the financial equation. And even with ample budget, you shouldn’t exclude the smaller players, since they might be the best fit for your needs. It is good to be mindful of the amount your organization is comfortable investing in a WCMS platform. Over-buying for your needs can be equally as dangerous as under-buying in this significant, long-term technology investment.

Consult with Your Partners: It is highly recommended that you engage a consultant that you are comfortable working with to help select the technology. A neutral third party will be much more likely to recommend the right solution for you without being influenced by biases or internal pressures.

Helpful Tip: Hire a third party to derive a short list of vendors, or conduct a RFI (Request for Information) process to help narrow down the choices. It’s important to gather information from potential vendors and technology partners before the RFP (Request for Proposal) process.

If a service partner has already been decided upon for the implementation, then start with an examination of those systems they are fluent in, and then, only if those are not suitable, move to investigating others.
5. Shortlist Service Providers:

Organizations should look at the service providers (integration team) 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 your requirements in a way that resonates with the business, senior stakeholders, and the overall organization’s needs.

When your organization has narrowed down the list of WCMS vendor solutions, you must examine the service providers and their methodologies. Doing your own investigation is important, but it is also good practice to ask the short-listed WCMS vendor recommendations for two of their best integrators best suited to fulfill your focal needs. This helps tremendously in narrowing down the vendors and integrators, and our next step explains how.

6. Conduct Vendor Demonstrations:

You will notice, like the shortlisting of vendors and service providers, that the vendor demonstrations in our 8-step process are earlier in the process than one might expect. Traditionally, vendor presentations come toward the tail end of the request for proposal (RFP) process, after responses have been submitted. However, with the short-list of qualified vendors already identified by this point, these vendor demos act as a kind of in-person pre-RFP response session. Thus allowing for a shortened, more productive, RFP process to be executed.

The product demonstration process provides the opportunity for bi-directional learning so you can express to all stakeholders involved in the demonstration (from your organization to the integrators) what it is that you are seeking from them. Also, the demos allows the integrators to educate you on what it is they are able to do for your organization, and will give you a sense of how well your teams would work together.
Also, executing the product demonstrations prior to the vendors and service providers responding to the RFP allows for the opportunity to communicate your needs to the vendor (scope of requirements), as well as budgets, timelines, pain-points, etc.... in detail and with more context so that the vendor can provide a more thorough and tailored response.

At the end of the day, all stakeholders should do their ranking on each platform and the integration team. Ranking, as in assigning first, second, and third place, rather than scoring, simplifies identifying the top choice team by removing the ambiguity and complexity of trying to assign a score. Ranking the demonstration teams should be a 3-step process:

**Step 1** – Observe and take notes: Go through the demonstrations and have all the stakeholders capture their own comments and subsequent ratings/rank on scenarios pertinent to their role.

**Step 2** – Compare the different demos: Which one did better in what area – what means most to you (the focal needs) – how do the systems stack up and do you feel about the integrator having a solid grasp of the platform and the deployment of the system.

**Step 3** – Rank the demos: first as individuals, then as a team. Rank each of the demonstrations in relation to the others – there can be no ties! This should help identify which vendor and service provider will be most successful in meeting your WCMS implementation needs.

**Helpful Tip:** If you want a good partner, you need to act as a good partner!
7.   **Execute RFP Process:**

Most companies jump to this process right away. Doing an RFP early on can be a big mistake and a waste of time for everyone involved. By jumping to the RFP first, before the onsite demos, you have not given the service providers enough information about you or your needs or your budget and they are blindly answering to your checklist and questions and even providing you with a cost estimate when they don’t know anything meaningful in order to provide you with an accurate proposal.

It is crucial to do your homework first, and be as informed as possible to understand what it is that you really want to ask the final (top-3) system vendor/integration teams. This approach will get you meaningful answers and create a collaborative environment for both you and the service providers. Putting the RFP process near the end will eliminate the need for 60-page RFP responses, as you will be familiar with the vendor and integration teams by now; and they know enough about your organization and your needs to provide you with the best possible proposal.

**Helpful Tip:** Eliminating as many vendors and integrators as possible BEFORE you start the RFP process will make it easier to properly compare the vendor teams that do participate in the RFP process.

8.   **Proof of Concept (POC):**

We suggest a two-week, paid Proof of Concept (PoC) for your stakeholders to test as to whether or not the system actually works the way it was showed during the demonstration. A paid PoC saves regret, time, and money in the long run. Two weeks will provide ample time to assess the appropriateness of the technology, the “fit” of the service provider, as well as provide them an opportunity to gather the knowledge they need to more accurately price, or at least estimate, their costs for the implementation.

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? Most importantly – do they care?
This is a perfect situation to get a sense of how well the WCMS will address the identified needs, as well as how the actual implementation team plans to implement the technology.

A PoC should have two deliverables on the service provider’s end:

- They need to show you how the system works for you and your specific needs, and

- Since they now understand your organization’s needs better, they can give you a meaningful price estimate in their RFP response.
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 sales and marketing, collaboration with customers and channel partners, 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 a must.

We hope this white paper has provided value towards ensuring you make the right decisions quickly and with confidence.

For more information or if you would like to discuss your project needs with a professional and experienced WCMS Analyst, contact Digital Clarity Group.

To hear more detail on DCG’s 8-step WCMS selection process, tune into the CMS Connected December 2012 show where Scott Liewehr talks through and explains each of the eight steps.
DCG helps leaders navigate the digital transformation by providing clear, actionable advice across four advisory areas including: Consumer Engagement, Social Enterprise, and Innovative Change brought by Adaptive Technology.

Aligning business goals with a technology platform is more than just matching features to requirements. At DCG, we believe the ultimate success of technology deployment depends as much on the team that will implement the solution, as it does on the solution itself. Therefore, DCG spends as much time focusing on how and who will actually deploy the technology as we do in matching your business requirements to our extensive knowledge of the technology vendor marketplace.

DCG has a proven approach to strategic reviews of technology across the four areas in which we specialize. We review the existing practices and infrastructures (comprising people, process and technology) tailoring our review to each client’s specific business objectives. The result is a repeatable, yet scalable process that not only ensures an appropriate technology selection for the immediate project, but a strategic roadmap to help any subsequent technology selection in the future.

Ultimately, Digital Clarity Group helps to lead our clients through the most efficient, yet thorough review of the available market options. Our focus on current market trends and deep knowledge of the available vendors, help cut through the marketing and get straight to the intelligent application of technology.

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