

Selecting Today's Enterprise Web Content Management System

Five best practices for getting your team ready to select a tool to engage customers, deliver personalized experiences, and manage customer experience effectively

By Robert Rose and Scott Liewehr

Highlights

5

WCM systems now manage experiences and are more complex than ever

7

Ensure support for the team that “makes it work”

10

Experience management means looking beyond managing web pages

11

The critical role of platform migration

Sponsored by



HIPPO

**DIGITAL
CLARITY
GROUP**



Executive Summary

Web content management (WCM) has changed. Both marketers and consumers are taking more and more control over web content. And, as they do, it's no secret that the amount of content in the organization, along with the tools producing it, have increased significantly. The production of social and mobile content alone has more than doubled the number of properties that the average business is now responsible for managing.

Content on the web has become more mobile (via smartphones, tablets, and other devices) and more social (via Facebook, Twitter, LinkedIn, and others). Additionally, as businesses become more global, the need for web content platforms to support sites in multiple languages has also expanded.

It's just no longer productive to simply publish content out in some static way. Whether it's websites, mobile content, wikis, blogs, RSS feeds, social media, or any type of enterprise collaboration, the key is that content *is conversation*, and the two-way flow can mean that content comes into the organization just as quickly as it moves out.

“Today content is contextual. Consumers want and expect context-rich web experiences that use location, device, presence, behavior, the social web, and other information to anticipate their requirements. In short, they expect content when, where, and how they want it, exactly meeting their personal needs.”

Some web content management systems have evolved to meet many of these requirements, and many vendors have modified the nomenclature to reflect these changes. Terms such as web engagement management (WEM) and customer experience management (CXM or CEM) have found some favor among both content marketing practitioners and WCM vendors. Forrester's 2013 *Wave Report for Web Content Management* focused on the products' support for “digital experiences”



(DX) using content.¹ As DCG noted in response, Forrester’s “emphasis [is] that the domain of all these technologies pertains only to the digital side of the customer experience. It’s a valid alteration, addressing one of the biggest critiques of CXM, aside from unnecessarily creating a duplicate acronym when ‘CEM’ already existed.”²

Regardless of the acronym, the point is that the business need has changed from simply managing web content to managing user experiences and supporting a buyer’s journey across multiple channels. As a result, selecting a new WCM solution is more complex than it has ever been before.

The selection process may be staffed by your own internal team, or you may seek assistance from an expert consultancy. Regardless, there are a number of best practices that can help ensure that the selection process is well informed, comprehensive, and leads to an outcome that forms a solid foundation for the future. This Insight Paper will cover the following:

1. **Focus on ease of use.** New solutions that help to manage digital experiences are much more complex than established WCM systems – yet at the same time they must make it easier for all manner of business managers to do their jobs.
2. **Ensure the ability to change and adapt.** Today’s enterprise technology environment is a patchwork of best-of-breed solutions, enterprise vendor platforms, and custom legacy applications. Marketing and IT must be aligned in order to create a system that can be implemented, integrated, and supported over time.
3. **Don’t get caught in “analysis paralysis.”** Savvy enterprises do the up-front work to prepare for the selection process. There are more than 2,000 vendors in this space. Doing the work up front helps to make the long list of vendors short and the short list shorter.

- 
4. **Recognize that the web is no longer measured in pages.** With multiple social and mobile platforms, globalization, and the need to deliver contextual experiences, savvy enterprises are preparing for much more dynamic content delivery.
 5. **Prepare for smart content migration.** The experience management paradigm is different than the content-as-page paradigm, and smart organizations are reviewing which content should actually make the grade to new, more dynamic systems.

We will now elaborate on these best practices for preparing and conducting your WCM selection process.³

1. Focus on Ease of Use

It used to be that ease of use was measured by how easy it was to simply take a piece of content and transform it into something on the web. Every WCM vendor would highlight their WYSIWYG capabilities (what-you-see-is-what-you-get) and show how simple it was for a nontechnical user to copy and paste and edit content meant for the website.

At the center of creating consumer experiences are processes and software tools that enable marketers to better manage visitors and nurture them into deeper engagement with content. From the sales perspective, this amounts to transforming visitors into leads and prospects into customers. From the publisher's perspective, it involves enticing audiences to consume more and more content – thus generating more advertising views and increasing the likelihood that the audience will engage with that advertiser. And, from the government perspective, this it means decreasing the friction that users have with content so they can get more deeply engaged and find it easier to locate the information they need.

Whatever the ultimate goals, the processes that any of today's WCMs must facilitate are similar. A superior WCM solution should support business users as they:

- Test content across channels (e.g., desktop, mobile, social) for relevance and conversion.
- Create different content across different buyers' journey paths (e.g., social media, blog, website) for this is how customers will increasingly engage with content. This is the “experience” we are attempting to manage.
- Manage and create multiple channels, such as integration with social media, blogs, different languages, and different sites – without needing additional technical development.
- Create multiple versions of content that span the different channels

“ As experience management has become the centralizing force, WCM systems have become inherently more complex. True ease of use now is much deeper and refers to how efficient and easy it is for any number of marketing and communications professionals to do their jobs. ”

- 
- Monitor and create “personas” as they interact so that we might continually optimize (or even personalize) their engagement paths.
 - Listen and/or watch audiences in order to understand how they interact with content. Use data to gather insight into how we can continually improve all of the above and provide the ability to automatically optimize the content based on that data.

This process will reflect a cycle of continual improvement for the relevance of content and improve the experiences we are creating.

The key requirement for your WCM system is the ability to automatically optimize content across each of the visitor frameworks – and even within the individual personas within those frameworks. For example, you may have multiple personas within the “unknown visitor” frameworks (people from Los Angeles versus people from New York, for example) – and depending on the business, they may or may not be the same at the customer level.

Put simply: The WCM system must support fine-grained definition and manipulation of the individual personas so that the marketer has the ability to understand them more completely over time.

2. Ascertain Its Adaptability

In most enterprises today, the software technology landscape is a patchwork consisting of best-of-breed solutions, enterprise vendor platforms, and custom legacy applications. While internal and external customers expect all this to work seamlessly, the challenge corporate IT faces is that business needs are changing more rapidly than ever before. With today's ubiquitous web and mobile access, customers (both internal and external) expect real-time results and transactions. As DCG colleague Tim Walters noted in his Insight Paper, *Understanding the Mobile Shift*, "The transition from a PC or notebook to the 'always on' smartphone or tablet is not primarily about the smaller, more portable mobile device. It is rather about the fact that computing services are now available virtually wherever and whenever the user desires them. The mobile shift marks an evolutionary leap to the era of ubiquitous computing."⁴

The integration between content platforms and back-office systems needs to be tighter than ever, and the pressure from marketers and sales for bringing new web solutions online is increasing. Therefore, it's

increasingly unlikely that any out-of-the-box WCM solution will fit instantly in your environment and meet every requirement.

In today's enterprise environments, software systems need to be integrated and fine-tuned, adapted to meet the demands of business users, and hardened to ensure security.

Given these requirements, the key is to understand whether your team has the skills, experience, and resources it needs to customize the chosen solution(s) and build integration points into your existing infrastructure and applications. (Note that "your team" may refer to internal IT staff, the vendor's professional services organization, or a third party service provider, such as a digital agency or systems integrator.)

Sometimes, the extension points built into the solution by the vendors (called APIs) suffice, but often they don't. Bottom line: Your team should have the ability to understand the selected WCM system and to customize it to the unique needs of your business users.

“ One of the core beliefs that we maintain at Digital Clarity Group is that the team that ‘makes it work’ is as important as the selection of the technology solution itself. ”



You should also make sure that you are getting a tool that will grow and evolve not only with you, but also with the technology team that will be responsible for “making it work.”

Note that this is not an open source vs. commercial solution debate. Certainly open source software (OSS) has increased in popularity in recent years – and, in general, open source solutions offer more flexibility to customize the solution to your unique requirements. (Whereas commercial solutions typically offer benefits around support, upgrade paths, and warranties.) Regardless of which you pick, you should ask the following questions during your selection process:

- What are the guaranteed support levels and what do they include in the way of customizability?
- How, and how often, are regular updates and patches created?
- What does a given organization offer in the way of legal indemnification and liability?
- What is my upfront investment and what are the costs in my ability to manage and customize it over time to meet my unique requirements?

The key to understanding the total costs of superior solutions for experience management will be to look well beyond the initial licensing costs and more deeply into the flexibility and adaptability that the platform brings – and the costs to change it over time. A free solution will not be free if you have to pay every time you want to change it. And, a commercial license may be quite effective if it comes with the support and ability to customize the solution to exactly your needs today and in the future. Interoperability and connectivity with existing infrastructure and platforms should be easy to achieve, and the freedom to adapt the software to new demands from business users should be an inherent feature.

3. Develop Your Short List

At some point, whether or not you have retained a consultancy to help you make a list of potential solutions, you will need to develop a short list. One of the keys here is to actually take the time, as “experience managers,” to develop a business case, project definition and requirements document – and really understand the process that you want to facilitate. Identifying these focal needs will help to distinguish and filter what could be a very “long list” into something much more manageable – and will ultimately keep your “short list” down to no more than three or four solutions.

Generally speaking, make sure that you focus on relevant strengths and weaknesses when you start grading the solutions. This is another reason for a relatively short list: The more vendors you have on your list, the more you will have to grade – and the less likely you are to be comprehensive in the grading.

There are a number of tools available that can help you develop grading criteria – but obviously a great place to start is the project definition and requirements. Be sure to develop scenarios and test cases and be sure that the prospective products can handle them effectively. Establishing a proof of concept or test project can be extraordinarily helpful in determining what the software can and can't do – and how it will meet your requirements.

Beyond this functionality, there are some software requirements that you will want to review as part of the selection process, including:

- **Geographical coverage for support and service partners.** Where is the company located – and what support offices or partner coverage do they have around the world? You should especially look at where they have implementation partners and other professionals who can help you tailor the solution.
- **Vertical strengths.** Are there any specific industries where the solution is stronger than another? For example, if you are a financial services company, are there particular solutions that offer features, security, and other options specific to your unique needs?
- **Technology compatibility.** What technology will you and the implementation team be comfortable with over the long haul? This should be viewed both in light of the skills on your team and the interoperability of the services that the system will have to communicate with.
- **Licensing flexibility.** What options are available for licensing the product? Are there both installed and cloud versions available? Also, how does the licensing complement the support and services? Make sure that you ultimately compare apples to apples in terms of what the licensing covers.
- **Support services.** This is probably the most important of all the criteria to fully understand. Your WCMS should be built to change and adapt to your needs. You should have the ability to put in adjustments to service-level supports over time as your needs change.

4. Do Not Overlook Content as a Service

Savvy enterprises are beginning to look at standards-based content repositories – or Content as a Service (CaaS) – as the way to remain nimble and extract even more value out of both sides of the content management equation.

One of the biggest benefits of this CaaS strategy is how it empowers an organization to phase in more sophisticated ways of delivering content to multiple channels. For example, some companies are using CaaS to deliver only part of their website – or perhaps only their mobile channel. Or, in some cases, they are only using the content filtering and display mechanisms. These are future-looking features that will truly redefine the way that experiences can deliver value over the long term.

You should make sure that your organization looks at WCM solutions that can utilize some level of service-oriented architectures in order to deliver content on demand to customers, partners, employees – or any audience that needs to consume the content. This approach provides you with a lot of power to put “intelligence” behind the display of content.

Today’s leading systems have the ability to deliver content through an API to any content channel. This empowers you to deliver contextually aware content. But it also provides the ability to customize the interface for any type of input you may need. These may include mobile interfaces, tablet interfaces, or custom-built interfaces (e.g., a third-party application).

Many WCM vendors in the market today are *still* only worried about how to publish pages from one central interface. While this answers the old need to make it easier for business users to publish website content, it does not address today’s requirement to optimize dynamic experiences for consumers in real time.

“ As the noise of content and the ability for consumers to filter it becomes more pronounced, marketers must look to WCMS technology in order to enable a more relevant conversation with customers. ”

5. Prepare for Smart Content Migration

Once you've made the decision to move forward and select a new experience management solution, you'll want to employ some best practices in preparing your organization for the migration to the new platform. Certainly, the scope of these best practices will be unique to the size of your project – but in general, you can expect to prepare for your new tool and the migration of the old content using these four steps:

Plan and define

There is a saying that goes, “A job well begun is half done,” and for a WCMS migration, this is especially true: A good start is especially important.

Remember, there are two pieces to your WCM migration: the implementation of the new solution and the migration of the content, the code, and (most importantly) the content management processes from the old into the new solution.

To that end, you'll either work directly with internal IT, the WCM vendor, or a service partner to create the implementation plan. But regardless, you'll want to identify these key components:

- **The project definition.** Is the new WCM simply replacing the existing solution (for cost savings perhaps), or is there an experience management project and thus new marketing and content display requirements that dictate the need for a new web content management solution? This is the place to define the project in detail.

- **The timeline and assumptions.** What is the timeline for this new system to be in place, and what are the assumptions that are being made to meet these deadlines?
- **The key personnel.** Identify the roles of project people on the implementation team as well as those of the affected personnel. This includes existing content approvers, infrastructure (e.g., IT) personnel, and anyone with a relationship to the existing WCM platform.
- **Functional and technical requirements.** The project definition discussed above will stipulate functional and technical requirements that need to be addressed in the new WCM solution. These should be sorted into two categories: gap requirements (or gaps in existing WCM functionality), and new requirements that can be addressed with the new WCM solution..

Listen as well as speak

Using this plan to then set expectations is a critical part of a successful migration. Be prepared to both listen and communicate. While you certainly want to communicate the new project vision – and the new vision for the content management process – you also want to listen to the concerns users have about the existing system.

Make sure that everyone understands the new system, why it is being adopted, and what new capabilities (if any) will be possible with the new tool. It's very common that despite their dissatisfaction with the old



tool, end users will resist change. Thus, while these conversations may not affect the final implementation plan, they do ensure users that their views matter and that they have a stake in the process – which can lead to a smoother migration and more rapid adoption of the new WCM solution.

Finally, after you've gotten this feedback and communicated the vision, make sure that everyone understands that there is a limited timeframe for change requests. New requirements, features, and process changes can wait until after the new system is implemented and the migration has taken place.

At this point, your plan is finished and you are ready to take the next step.

Time to hit the delete button

As part of your project planning and definition, you should endeavor to get help in determining what (if any) content can be removed.

Migrating existing content is the most difficult part of the entire implementation. Culling unnecessary content can be a huge benefit. If your existing system is more than a few years old, it's very likely that there is old, outdated, erroneous, and irrelevant content that can and should be deleted.

Code and integration inventory

This aspect of the migration is often a major project in its own right. But in general, you will want to identify the bits of display code that are WCM: centric: in other

words, which website applications are tied directly to the WCM system and will need to be migrated or recoded with the addition of the new solution.

You will have done some work on identifying these in your functional requirements (and this is where differentiating between existing gaps and the new requirements becomes important).

The WCM system-dependent code can include such things as navigational structures and related content widgets. The question to ask is: If the existing system is turned off, what functionality and content display mechanisms do we lose?

These plans, communication, and content or code inventory will prepare you for the implementation of the WCM.

Conclusion

Effectively addressing the new demands for rich digital experiences is about selecting a tool that will unify an engagement process across your entire business. You should focus on tools that help you leverage content from throughout your entire business – and publish it in a way that enables any channel, to any consumer, in any format.

Marketing is becoming more content-centric, and as such, it needs to be much more nimble and agile with content. Your choice of a tool to engage your customers plays an important role in your ability to remain successful.

There are more than two thousand WCM solutions to choose from, varying in price, design, and functionality. Many systems provide much more than just content management capabilities. With so many WCMS choices available, how does an organization select one that meets their business and IT objectives? Simple – a well-planned and well-executed evaluation process.

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 the dire consequence of a subpar 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.

“ 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. “



Endnotes

- 1 Forrester's report on WCM is available at <http://www.forrester.com/home#/The+Forrester+Wave+Web+Content+Management+For+Digital+Customer+Experience+Q2+2013/quickscan/-/E-RES82462>.
- 2 See Scott Liewehr's April 9, 2013 blog post, "Analyzing the 2013 Forrester Wave on WCM," available at <http://www.digitalclaritygroup.com/blog/analyzing-the-2013-forrester-wave-on-web-content-management/>.
- 3 Many of the following best practices were included in the discussion of WCM selection by DCG's Scott Liewehr on CMS Connected in December 2012. A video of that presentation, which includes DCG's complete eight-step selection methodology, is available on DCG's YouTube channel at http://www.youtube.com/watch?v=HHiXmW8jgLE&list=PLl0CjHTl84BwYc3wF7lRASZyEo_htgHnk&index=1.
- 4 "Understanding the 'Mobile Shift'" is available at <http://www.digitalclaritygroup.com/blog/research/research-papers/>.



About DCG

Digital Clarity Group

With a global research-driven advisory team, Digital Clarity Group (DCG) helps business leaders navigate digital transformation in their organization. DCG works with its clients across four distinct themes - Consumer Engagement, The Social Enterprise, Innovative Change and Adaptive Technology. DCG provides independent research, customized consulting, events, and one-on-one executive advisory programs. DCG also provides guidance to technology companies and the service providers that implement their products to help deliver insight that can guide them to better strategic decisions and more useful products and services. For more information about DCG, visit www.digitalclaritygroup.com or email info@digitalclaritygroup.com.

Contact Us

Email: info@digitalclaritygroup.com

Twitter: [@just_clarity](https://twitter.com/just_clarity)

www.digitalclaritygroup.com

© 2013 Digital Clarity Group, Inc.