



How to Choose Your Next CMS

The Four Checklists You Need to See

The content management system (CMS) started as a software solution consisting primarily of technology tools for creating and managing websites. Over time, the CMS has transitioned to products and platforms that comprise an important foundational piece of technology for most organizations.

The CMS can be a versatile technology platform that is called upon to handle significant projects and activities for different kinds of websites and other digital venues related to customers, marketing, sales, branding, and web presence.

To enable successful online marketing efforts, the CMS is often at the core of a comprehensive platform that can include e-commerce, collaboration, digital marketing, and other capabilities. In this capacity, the CMS takes on an essential role in what organizations are doing to differentiate their brands and their products.

The CMS has important work to do for many different parts of the organization, so understanding how best to evaluate a CMS offering is crucial. The opinions of people on different teams really need to be heard before making the final decision.

These people include technology evaluators, marketing managers, content creators, and line-of-business teams. Some of these people aren't necessarily knowledgeable about CMS or online marketing platforms, so it's important for all buyer and evaluator roles to work together to select the solution that best fits what the overall organization needs. They also should consider how IT and business teams want to work with it. It's equally important to understand the different kinds of value that the CMS delivers to the entire organization.



Overcoming the Challenges of Choosing the Right CMS

Technology buyers and evaluators definitely have challenges to overcome to make purchase decisions based on what the overall organization needs from a CMS and marketing technology solutions. They need to work with diverse teams in an organization to understand a variety of requirements and expectations for each team and then map those requirements to the right CMS, which is not an easy task. They also face the challenge of figuring out which CMS will provide the best value to the business and fit into the current technology infrastructure.

It's important to explore primary questions and points when researching and evaluating a CMS solution that provides capabilities for creating company websites, managing all kinds of content, supporting digital marketing efforts, and other business requirements.

The information in this paper is designed to help CMS evaluators work with other teams in their organization to consider all pertinent points of view and requirements fully when deciding which CMS to evaluate and then purchase. Evaluators will gain important insight from understanding the problems that different teams can solve by selecting the right CMS solution.

Here are four key checklists to guide you through your evaluation and decision-making process:

- 1 What do you want to accomplish with the CMS?**
- 2 How do you want to get up and running with the CMS?**
- 3 What are the key capabilities and features to consider?**
- 4 Is a comprehensive CMS and online marketing platform right for your organization?**

How you and your teams answer these questions and rate the importance of certain aspects of a CMS platform will help point you to the right solution.

First, technology evaluators and buyers should take the time to figure out the purpose of using a CMS to understand the strategic value of acquiring a solution to handle the website, marketing, and content needs of the organization.

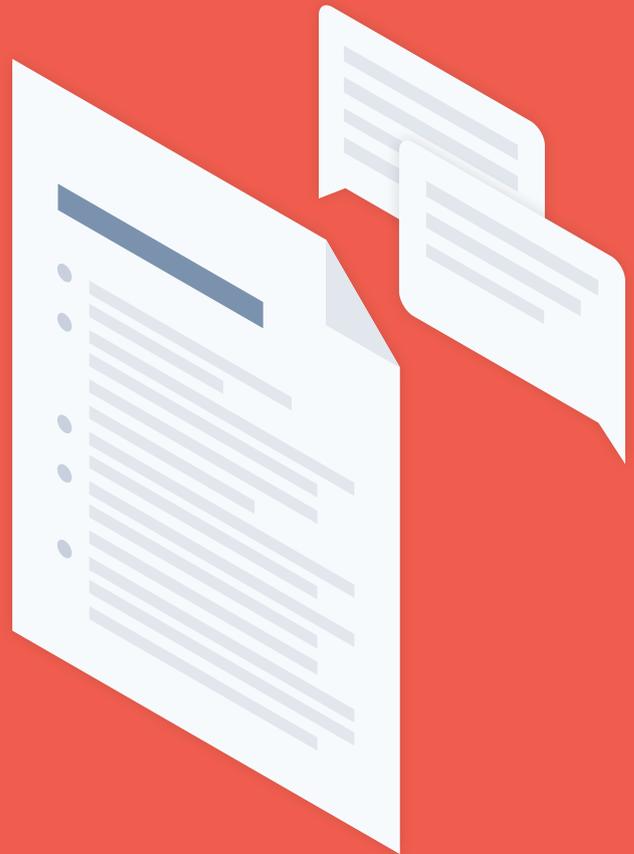
CHECKLIST 1

What do you want to accomplish with the CMS?

Before plunging into evaluations of CMS solutions, you first need to meet with all stakeholders to figure out how the CMS is to be used by different teams. Discuss team goals that need to be supported by the CMS and how they relate to the business objectives of your organization. For example, what do you want to accomplish with your website: provide information, generate leads, have an e-commerce platform, implement marketing campaigns, or all of the above? How do these goals connect to higher-level revenue and business expansion objectives?

From your company goals, work with stakeholders to define today's important use cases—and even some use cases for the near future—to frame your evaluation and purchase processes.

Organizations can fall into the trap of selecting a CMS solely from a list of features or technologies rather than thinking about how the CMS will help them for primary use cases.



What else is your organization trying to accomplish?

What do your line-of-business, management, and marketing teams want to achieve with company websites?

Multiple objectives from these different teams will clearly impact the kind of CMS solution you should consider. Have you worked in enough detail with company management and business teams to understand the extent of requirements across the organization?

Different teams may be interested in initiatives for:

- Delivering contextualized, omnichannel experiences that meet customer expectations
- Executing consistent digital campaigns that drive favorable business outcomes
- Converting customer interactions into quality leads that result in purchases and repeat business

Do you have processes in place to work well with IT and business teams to understand what they need both now and in the future?

It's important to evaluate CMS solutions that will fit well into the existing technology infrastructure and that can be supported by the IT team.

But remember: marketers are taking the lead more and more on technology purchases for software like CMSs. Marketing teams are gaining bigger budgets to purchase the technologies that they need, and teams often include marketing technologists that influence purchase decisions. You have the opportunity to make a positive impact on technology decisions by helping business and technical teams work well together to research, evaluate, and select the right CMS.

A CMS solution is not just about the technology—it impacts all the teams that work with it. To do their jobs well to benefit the organization, marketing and content teams need the right tools. A bad choice for a CMS solution can greatly hinder their efforts as well as negatively affect revenue generation and business success.

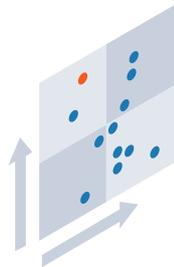
Will the CMS that you evaluate support diverse requirements and objectives for multiple teams in your organization?

What are different ways to research CMS and marketing technology solutions?



CMS vendor corporate websites

Corporate websites are still the top source for the research conducted by software buyers. CMS vendors should provide not only product information through web pages and data sheets but also detailed use cases, customer success stories, white papers, demo videos, how-to podcasts, and blogs that share expert advice. Industry analyst reports are often available as downloads. Customer references should also be available from the sales team.



Industry analyst firms

A number of analyst firms research and review CMS and digital marketing platforms. Often, these firms provide benchmark reports based on the attributes they consider important for a CMS to deliver. These firms also have definitions of CMS and online marketing solutions that better align with what many buyers are looking for. Gartner, Forrester, Real Story, and Digital Clarity Group are among the analyst firms that cover CMS and marketing technology solutions.



Crowdsourced review sites

Be sure to review closely how each site defines the CMS category to see if the definition aligns with what you are looking for in a solution. Reviews are highly dependent on the competence and truthfulness of the person writing it (purportedly an end user). For CMSs, these sites will likely include many products that are not suitable for your needs. Sites include G2 Crowd, TrustRadius, and Software Advice.



Industry expert blogs

Numerous people with extensive content management system experience regularly write about this industry, covering the optimal characteristics of CMSs for particular use cases and specific vendor offerings.



Forums, user communities, and LinkedIn groups

The users of CMS solutions are often active in various groups and forums, sharing their knowledge about how to get the most from CMSs and providing commentary about individual products.



Online publications

Several online “magazines” publish articles on the many aspects of content management, digital marketing, content marketing, e-commerce, and other relevant topics, and software solutions are often discussed. Online publications include cmswire.com, econtentmag.com, and socialmediatoday.com, to name a few.

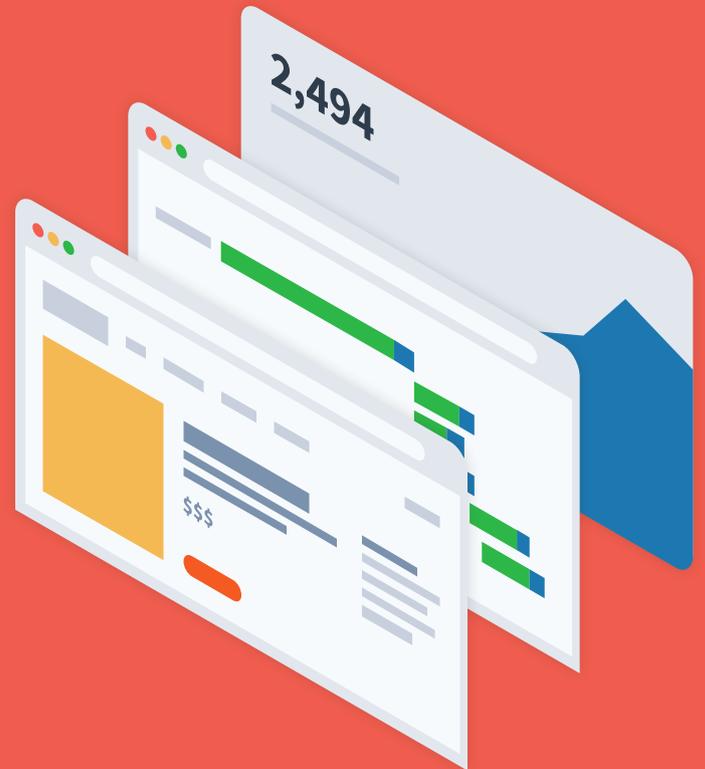
Now that you have thoroughly explored what your organization wants to accomplish with a CMS, you should fully consider how the CMS will be implemented and used by the organization now and in the future.

CHECKLIST 2

How do you want to get up and running with the CMS?

Identifying clear business and technology goals and objectives is also important when considering how your organization will start up the CMS implementation. There are implications in terms of current organizational infrastructure, supported technologies, internal and external resources, and making sure business teams will know how to use the CMS to the best of their advantage and technical competency.

How you use the CMS to deploy sites needs to align well with your current requirements and with possible future directions. It's important to consider CMS solutions that offer flexible options for implementation, deployment, and support.



What is your high-level plan for working with the CMS?

Are you looking for a solution that will grow and change with your organization?

Not only can organizations grow in size, but they can also grow and change in terms of business objectives, product offerings, and business models. Specific teams also change over time. For example, marketing strategies and tactics change continuously.

Explore not only how well the CMS solution will scale as company websites expand but also the history of the vendor for keeping up with trends that are important to the teams in your organization.

What is the vendor's commitment to improving the performance and capabilities of the solution continuously? Has the vendor shown healthy growth over the past several years? Does the vendor's product vision or roadmap indicate that you are likely choosing a product with a healthy future?

How do you plan to implement the CMS? Where do you want to host your sites?

Besides their corporate website, organizations usually have a wide variety of other sites: online stores, community and forum sites, intranets, marketing landing pages and campaign sites, and blogs. The right CMS lets you implement and manage all of your sites from a single interface for ease and speed.

Often, it's best to consider CMS solutions that support different options for hosting sites, including managed cloud hosting. There should be multiple options even for cloud hosting to find the right approach for your sites, such as enabling web farms.

Does your organization serve markets around the world?

There's more to deploying engaging websites for different countries than translating copy into another language. Doing business on an international level means you have to create websites to fit the local culture of each country in your target market. The right CMS is designed to create websites and mobile sites in any number of languages while providing centralized management for maintaining unified brand and web presence across those diverse sites.

Would you benefit from consulting services to help get you and your teams up and running faster?

Check to see if the CMS vendors you are considering provide consulting services themselves, as well as an ecosystem of partners that provide such services. **Often, turning to experts will get you started faster and more efficiently.** Consulting services are better attuned to what you really need to get done first and how to plan for the long term. They can help you avoid common pitfalls and quickly learn more about the CMS.

What kinds of training would help your IT and business teams get more value from the CMS solution?

When implementing new software solutions, companies that invest in training for their end users and technology support teams are far more successful with the software. The right training ensures you are making the best use of the software faster and prevents more wrong turns. Teams benefit from the experience of experts who can answer the important questions that will lead to you achieving business goals

What is the overall cost and the value returned?

Cost is not only the purchase price to cover licenses and support. Cost also encompasses what it takes to get up and running: time, resources, and the money they cost. The risk of choosing the wrong CMS can mean a high price if proper care isn't taken in the evaluation and decision-making processes.

And cost ultimately refers to the value achieved by taking advantage of the right CMS to meet business needs. The right CMS can be a vital and versatile foundation for working with any content-related activities. It's essential for many aspects of marketing and customer interactions.

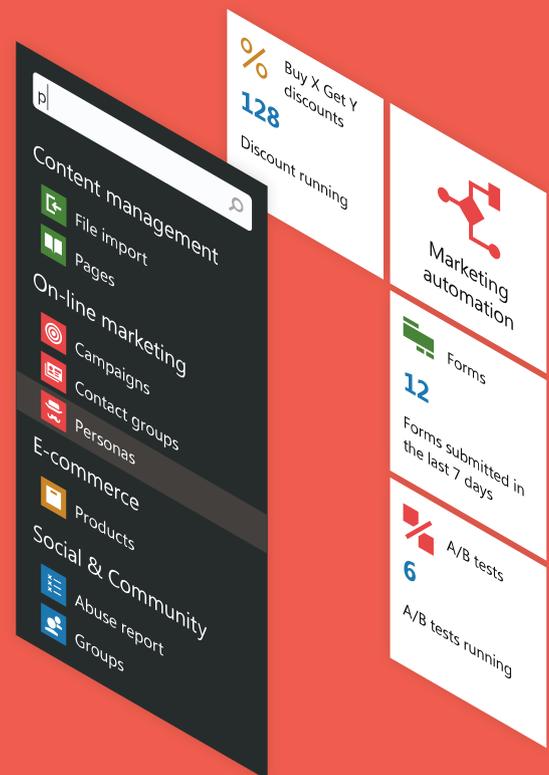
For organizations to use a CMS successfully, it's important to look at the many kinds of features and functions that different CMSs provide to figure out which solutions provide what different teams will need for their website, marketing, and content projects.

CHECKLIST 3

What are the key capabilities and features to consider?

CMS and online marketing solutions should provide a rich core of capabilities to handle many different use cases. Capabilities highlight how different users can potentially take advantage of these technologies.

But determining which capabilities are the right ones depends on the requirements and business objectives of the teams that will be utilizing the CMS.



Which of these capabilities top the list of requirements from your teams?

What do you need from user interfaces?

User interfaces (UIs) that are “friendly” to marketers and other less-technical roles (such as content managers and contributors) make a big difference in putting people to work quickly.

A well-structured user interface speeds up the completion of tasks and helps users track progress and results.

UIs can help more people work with sophisticated technologies without dependence on the IT team. The right CMS will provide ease of use and intuitive pathways through the user interface.

How important is content for everything your company does around products, marketing, and selling?

The rise in the importance of CMS solutions is directly tied to the upsurge in demand for quality content to engage customers and interest them in buying your products and services. Multiple teams in your organization have a continuous demand for content for their projects and initiatives. This calls for a versatile CMS to facilitate the creation, management, and use of multiple types of content, not only for the traditional website but also for mobile apps and sites, different marketing campaigns, and other digital venues.

The right CMS provides management of content created and used for business purposes—and of all content types. It supports testing and optimization of content and web pages and provides analytics to determine the effectiveness of web pages, marketing automation, and content marketing.

The CMS also provides content personalization capabilities to communicate with each customer on an individual level and provide them the most relevant information. Personalized content improves the customer experience with your company, especially in the context of real-time responsiveness to customer interactions.

Are you selling products online?

If yes, you need to consider a CMS solution that provides e-commerce capabilities. Your teams will want to create high-quality online commerce sites quickly. You'll also want a CMS that integrates with third-party systems (such as ERP and CRM) to move data bi-directionally between systems.

For companies selling online, repeat business is key.

A CMS with integrated online marketing capabilities is instrumental in creating exceptional customer experiences throughout e-commerce interactions. Happy customers come back to purchase again—and spread the word to people they know.

What capabilities do your marketing teams need for effective online marketing?

The CMS you evaluate should provide integrated capabilities for digital marketing activities, such as:

- Lead management and nurturing
- Marketing automation
- Personalization
- Email marketing
- Mobile marketing through sites and apps
- Responsive communications and interactions
- A/B testing

Comprehensive digital marketing capabilities greatly enhance the ability of your organization to connect with the right customers through engaging campaigns, content marketing, and interactive communications. For example, e-commerce capabilities combined with online marketing functions often work to improve the customer experience and the completion of purchases by providing services such as an abandoned shopping cart reminder.

Do your online marketing and selling strategies focus on connecting to customers anywhere?

Then you should consider a CMS solution that integrates your website with social sites, such as Twitter and Facebook. Most companies want to connect with customers wherever they are online. User-generated content is growing in importance for companies to monitor and understand.

More marketing and sales efforts are omnichannel, where customers want interactions on one channel (or device) to carry over to their next interaction channel. Customers don't necessarily look for the same experience on different channels, but they do expect—and often demand—consistency and highly-personalized experiences across all channels. Managing and monitoring omnichannel communications calls for a versatile CMS and digital marketing platform.

Will built-in collaboration and workflow tools help your teams?

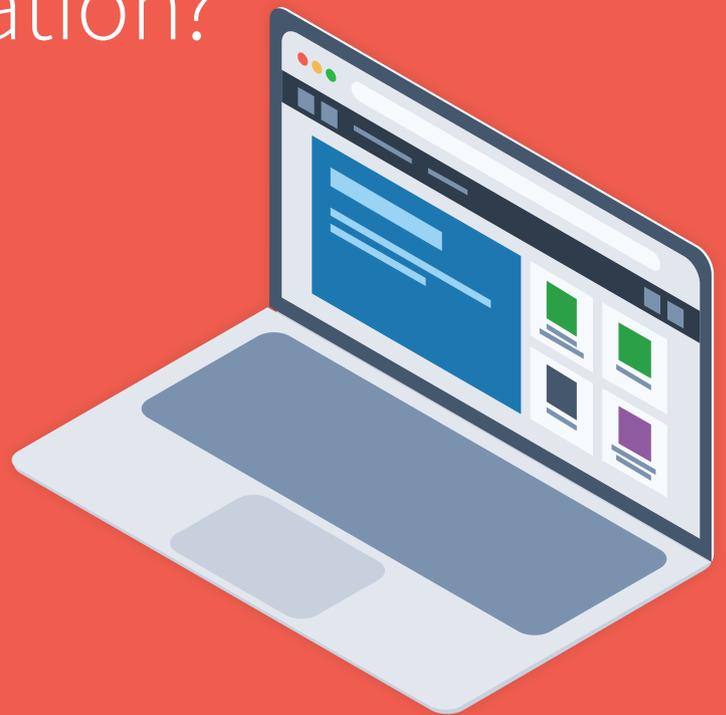
A modern CMS solution should support many kinds of collaboration between teams. Marketing, sales, design, and technology teams need to work together efficiently and effectively. With so many different kinds of content and authoring processes, workflow management for content creation and publishing is a must-have. Built-in workflow takes care of user management and version control for content activities.

Finally, it's important to consider the evaluation and purchase of a comprehensive platform that provides extensive capabilities for CMS and online marketing by exploring what such a platform offers and how well it matches the needs of the organization.

CHECKLIST 4

Is a comprehensive CMS and online marketing platform right for your organization?

A comprehensive or all-in-one CMS platform often includes functions for content management, online marketing, e-commerce, collaboration, and analytics. The technologies behind these functions are already integrated, which improves ease of use for marketing teams. A comprehensive CMS platform frequently provides ease of installation, lower maintenance costs, and a gentler learning curve for all capabilities. Otherwise, you will be purchasing separate solutions for the CMS and then for different marketing and e-commerce technologies that must each be integrated individually.



How do you decide if a comprehensive CMS platform is the right choice for your organization?

The right technology solutions greatly help many of the challenges for digital marketers?

Digital marketing initiatives often are dependent on the right online marketing technologies, continuously updated customer and marketing data analytics, and high-quality content that connects to customer needs and interests.

Organizations need CMS solutions that not only provide comprehensive capabilities for content management and online marketing, but that also support how marketers want to work with these technologies to put the best effort and creativity into online marketing initiatives.

The all-in-one platform provides numerous capabilities that already work together seamlessly

Web content management, e-commerce, and online marketing capabilities are often the most-used technologies for implementing digital marketing. Frequently, the better option is to choose a platform that already integrates these functions and capabilities.

The CMS must provide well-performing options for integration with a CRM, ERP, and other customer and transactional systems for a complete bi-directional flow of customer and transactional information.

Various data analytics results related to websites, customers, and marketing activities can be more easily shared across a comprehensive platform. Continuously updated analytics for customer information and behavior, products, and transactions are important to many aspects of online marketing.

The benefits of a comprehensive CMS platform

- **Creativity is still a high-value element of marketing.** With a comprehensive CMS and marketing platform as a toolset, marketing teams can put more time and effort into delivering creative approaches to programs and campaigns.
- **Different core technologies** (e.g., content management, marketing automation, e-commerce, etc.) **are already working together seamlessly** at a sophisticated level to help organizations with their digital marketing needs.
- All-in-one solutions usually fulfill the top content marketing and digital marketing requirements. These solutions often **combine ease of use with full-blown CMS capabilities and the most important digital functions**. Even all-in-one platforms that don't provide full depth for all features provide an easy-to-manage set of essential features that still meet most digital marketing needs.
- **Centralized management** for digital marketing activities improves workflow and speeds up time to implementation of programs and initiatives while simplifying tracking and tweaking them.
- Working primarily with one CMS vendor instead of multiple vendors can lead to **building a long-term relationship with that vendor**. Often, such vendors provide services beyond the platform itself, such as consulting, partner services, training, and access to expert advice through forums and groups.

Constraints that should be considered

- Can one platform convey mastery for all things related to content management, e-commerce, analytics, and digital marketing?
- Will the comprehensive platform keep up with the latest trends that your teams need?
- Conversely, are you sure that individual best-of-breed solutions would be the right choice for your organization, especially since each of these solutions has to be integrated with one another separately to work well for online marketing purposes?
- Do you want to maintain individual relationships with several vendors, not only for the initial purchase and implementation of each solution but also for ongoing support, maintenance, and upgrades?

Choosing the Right CMS

As with many technology purchases, evaluations of CMS platforms are more successful when they include both business and IT teams. Using a CMS and marketing software isn't just a technology project.

It's important that IT evaluators understand that the objectives and requirements of business teams are a top priority. It's equally important that business teams work with IT to select a CMS that IT can implement and support.

IT evaluators have a unique opportunity to help business and marketing stakeholders more clearly see what the right CMS can do for the creation and management of engaging websites, for delivering important content to the right customer at the right time, and for creative digital marketing programs that truly delight different kinds of customers.

As a unified team, business and IT stakeholders can jointly attend discussions and demos. These two groups can also hold separate sessions with CMS vendors but then should come back together to go over what each group has discovered in these sessions. When business and IT support each other in software purchase decisions, the organization can benefit greatly.

Choosing the right CMS can lead to an invaluable business and technology asset for your organization.

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