



WHITE PAPER

CONTENT MANAGEMENT SYSTEMS — THE SELECTION PROCESS

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If you're a startup dotcom planning to hit the Web this year with a national or global presence, the decision to purchase and implement a Content Management System (CMS) might seem like a no-brainer. But, for organizations with large amounts of legacy content and entrenched publishing processes, taking the plunge in the world of commercial content management systems can take months or years of discussions, persuasion, and negotiations.

So now you've reached that point. You're ready to invest in a system and go forward with a new structured approach to your content. You have buy-off and budget from the powers-that-be. So what's next?

This white paper will step you through the typical process of selecting a content management system. While some organizations may be more or less structured in their process, we hope to enlighten you with our experiences of what to look for, and also how one balances due diligence against the inevitable risks associated with a purchase of any large-scale system. Particularly with commercial content management packages, there are more risks than average, since the market is still maturing. Be assured, there is also much return to be had by implementing a CMS, so let's get to it.

A Survey of the Field

You have most likely started to take a survey of the field of CMS products out there-or at least you have heard of some of well-known players in the market. Content Management Systems, as a distinct product offering, have only surfaced since about 1995. Not by coincidence, this market emergence corresponded directly to the explosive growth in Internet content and e-commerce. While the first few CMS packages hit the streets, over the past five years literally dozens of new or repositioned products have entered the field of content management. Chase Bobko generally categorizes these products into three basic camps:

- **Established.** These companies grew up in the late 1980's and early 1990's originally in SGML or document management. They have strong stories for XML and enterprise content management where the main input is office documents. They tend not to be as current on the latest technology, UI, and understanding of the Web experience, but have very proven systems for handling large amounts of content.
- **Market Leaders.** These companies were in early on the content management game. They have name recognition and a full spectrum of services and case studies. They tend to position themselves as the "total" solution by means of doing things in proprietary ways. As competition heats up, they are recognizing the need for integration strategies to serve customers who aren't ready to throw out an existing infrastructure. The market leaders are relatively safe bets for longevity and will have a fairly mature support structure relative to newcomers.
- **Newcomers.** These companies have brought new, young product offerings to the content management space. They have the strongest story for Internet-oriented companies, the best use of cutting-edge technology, and the most ability be flexible to meet new customer needs. The trade-off with newcomers is often their size and the unsure nature of their business evolution.

Our experience with CMS packages has been that while there are some products that are in their fourth or fifth version, none are particularly mature when measured against other types of widely used software packages. What you'll find is that some products do some things very well, and some things not so well. It is important to remember not all of the products do all of the same things, so it's not always easy to compare apples to apples. This is why the selection process can be a rather protracted, and oftentimes frustrating experience. There is no slam-dunk product, no nirvana. With whatever package you choose, be prepared to spend a significant portion of your budget customizing it to your needs. So, while selection isn't easy, by adding some structure to the process, it is possible to choose a product you can live with, and grow with—at least for a while.

An Overview of the Process

Deciding on a software package that can easily run into the hundreds of thousands of dollars is something for most companies that should not be taken lightly. Choosing the right CMS is similar to the selection process of any significant purchase, and is best handled by distributing a Request for Proposal (RFP).

Here are the typical steps:

- 1) Establish a product selection committee
- 2) Gather detail requirements from all stakeholders
- 3) Write up and finalize the RFP
- 4) Research and compile a list of possible products
- 5) Establish “must have” and “high want” criteria to narrow your list
- 6) Establish a scoring matrix for the RFP responses
- 7) Narrow the list of packages to those that meet your must-have criteria
- 8) Send out the RFP to 5-7 vendors
- 9) Review and Score RFPs
- 10) Closely examine top 3-4 products
- 11) Narrow to one or two options and ask remaining questions
- 12) Compile reference questions and contact references for top vendor(s)
- 13) Select the product

As you can see, there is a lot of work involved. While it is possible for this kind of formal selection process to happen in a few weeks time, more often than not it is a several month process. Plan on providing an amount of time, which will allow vendors time to prepare responses, and members of your team time to perform their roles while continuing their “other” jobs.

Now let's look at each of these steps in more detail.

Establish a Product Selection Committee

It's very important to think carefully about who should be on this committee. The size of the committee will vary from organization to organization. However, a group of four to seven people is probably optimal. The selection committee should include these kinds of people:

- **A Leader** — someone tasked with heading up the selection process. This person could be from a marketing, technical or administrative group.
- **Marketing** — someone who is thinking about the target audiences of the publications (Web sites and other things) you will create with your CMS.
- **Publishing or Web Team** — someone who has experience with the existing publishing process and who will be leading the people who will be using the system the most.
- **Editorial Team** — someone who represents the writers and editors who will be submitting content for the system.
- **Systems Integration** — someone technical who understands the various other systems in the organization with which the CMS may need to integrate.
- **Development** — someone who represents the interests of the developers who would need to do customization and templating work for the CMS.

Be sure that the people who are involved are a) the right person to represent the needs and desires of their respective groups, and b) are willing and able to devote the time to participating in requirements gathering and other meetings, reviewing the RFPs, and attending the vendor presentations.

When you first get the team together, it is likely that not all team members will have the same level of understanding of content management or a CMS. It is crucial to make time to present an overview of content management to get everyone on the same page.

Gather Detailed Requirements from All Stakeholders

All of your system stakeholders may or may not be represented in the Product Selection Committee. Regardless, it is important that someone on the committee does due diligence to make sure that there are detailed, accurate requirements, and that they have been formed with full knowledge of the needs and desires of the stakeholders of the system.

Who are the stakeholders? That will depend on your organization and how you ultimately want to use your CMS. But, here are some of the kinds of stakeholders we've encountered when selecting a CMS.

- Project Sponsors
- Marketing and Sales
- IT
- Helpdesk

- Development
- Business End Users
- Production/Publishing
- Partners
- Customer End Users

How do you get detailed requirements? Explain how a content management system helps you to collect, manage, and publish content. Make clear that it is a software system that interfaces with other software systems and explain what kinds of publications your organization plans to produce using the CMS. Then ask, “What would your needs and desire be relative to a system like this?”

Requirements gathering can happen through various methods, including surveys, focus groups, meetings, e-mail questionnaires, or individual interviews. Whatever method(s) you choose, be sure that all relevant people are involved, and plan to spend time sorting through categorizing and organizing the requirements into a well-structured document. This requirements document will serve as the basis for your RFP.

Write Up and Finalize the RFP

Some companies have set structures for their RFPs, others do not. Basically the RFP is a document that describes to the prospective product vendors what you want from the system. It takes the requirements you’ve gathered and turns them into questions that allow the vendors to say how well their products and services will meet your needs. Typically one person (the leader of the selection committee), will write up the RFP. The document should follow an outline format with numbered headings to make it easy to refer back to various sections of the document. Then the committee and other stakeholders review the document prior to submitting it to the vendors.

Every organization has its own particular requirements. Being seasoned in content management, Chase Bobko (CBI) has generalized the following categories of requirements for a CMS. While not exhaustive, this is at least a start on the types of sections that should be included in your RFP.

- **Collecting Content.** Look at what the product provides in the way of tools for authoring, conversion and acquisition of content. If you need a user interface for non-technical users, closely review the user interface (UI) and decide how easy-to-use you think it will be for your content authors. Is the UI Web-based to handle authoring from outside your general network? If your authors are used to working in standard Microsoft Office® applications, many of the CMS products offer ways to leverage these tools for the authoring process.
- **Managing Content.** The systems should offer an interface that allows you to assign users and create different content types-basically administer the system. Some areas to look at include reporting tools, batch processing tools, version control and rollback, and archiving. The repository will either be a proprietary database or the products can attach into existing databases. If you want to tie into other enterprise systems, such as a contacts database or an accounting system, you’ll want to make sure that the databases can talk to each other optimally with a native driver for the database that you have. A key aspect to a CMS is the

ability to handle workflow. Workflow is the set of steps that a piece of content needs to go through from authoring through publishing. Think about the various types of workflow scenarios you have in your organization and see how those workflows could be implemented within the system. Consider such things as automatic triggers and e-mail notifications for initiating workflow steps.

- **Publishing Content.** All CMS products use some kind of template language that includes codes that draw content out of the repository and into the published pages. The complexity of these template languages varies, as does how automated the template creation process is. In addition to templates, one of the highest values a CMS product brings to the table is the publishing engine. CMS products typically include an application server that handles the interactions between the Web server and the CMS itself. The application server will handle such things as managing the database connections and caching, which can be critical functions when you are delivering highly-personalized, dynamically-generated content. For dynamic Web sites, the speed of delivering pages is something else to consider, as well as scalability — how you go about increasing the capacity of the system — and how much additional hardware is required.
- **Business Considerations.** These are the qualities of the vendor company itself. You will want to look at their reputation, years in business, leadership, vision, company size and overall financial stability.
- **Support.** You will want to get a clear understanding of the support offerings in terms of technical support, implementation support, and consulting services. Consider what you will need for mission-critical (24x7x365) and international support. Some smaller companies may not be able to deliver.

Research and Compile a List of Possible Products

While the RFP is being written up, you can be researching products. The Web is a great place to start, along with asking friends, colleagues, and business associates. Task either a person or a small team to go out and find basic information on as many content management products as possible. The types of basic information that are helpful at this stage include:

- Product Name
- Brief Product Overview
- Target Platforms it runs on
- Key features/selling points

Establish “Must Have” and “High Want” Criteria

While you may or may not call out your “must have” criteria in the RFP document itself, defining these “must have’s” is a critical step. A must have criterion is one that will make or break the success of the system. For example, if you are running on a UNIX platform and are not willing to consider a Windows NT Server environment for your CMS, then a UNIX is a must have for the system. Other must haves might include: a browser-based user interface, version control capabilities, and a user interface for entering personalization business rules.

Whatever they may be for your organization, the “must have’s” are crucial because they are what will allow you to narrow the field to a reasonable number. Review your RFP in a selection committee meeting and determine your set of must haves. Then measure the products on your list against these criteria. If a product does not meet even one of the criteria on the must have list, they are knocked out of the running.

Once you’ve reviewed the product field against your must haves, ideally you’ll have no more than seven products left on your list. If not, make a list of your “high wants.” These are the criteria that everyone on the committee agrees are highly desirable. The “high want” elimination process should bring your list down to the desired 5-7 products. If you have fewer than 5, that’s OK. It will help the process go that much quicker!

Establish a Scoring Matrix for the RFP Responses

The RFP responses that you get back from the vendors will need to be evaluated. To ensure fairness, it is a good idea to have several people (if not all) from the committee involved in that evaluation. Typically, you would create a matrix and a scoring system that allows you to assign a number to how well the product meets the specific requirement. For example, we use a 0-4 point scale, with 0=*does not support at all* and 4=*supports the requirement very well*.

Send out the RFP to 5-7 vendors

Once your RFP document is complete and reviewed by all necessary parties, send it to the vendor representative (usually the sales rep). Allow the vendors at least 10 business days to complete and return their responses. Be very clear in your communication when the responses are due. Also provide a contact name of someone who the vendor sales rep can contact if they have any questions.

Review and Score RFPs

Once you have received all the completed RFPs, distribute copies (paper or electronic) along with the evaluation matrix to all members of the selection committee to review. Provide instructions on how to evaluate, and when the scores must be turned in. Typically not all people on a selection committee will have the knowledge to be able to review all sections. Have people score only the criteria that they feel they are qualified to score. The person who tallies the scores will need to adjust averages based on how many reviewers evaluated each requirement.

By taking the average of the scores across all of the requirements criteria, you will arrive at scores for each vendor based on all the major topics, and overall scores. Looking at the overall scores, if you find products that score much lower than the top ones, drop these out of the running. What you have left is your shortlist of products that you’ll want to see in person.

Closely Examine Top 3-4 Products

The next step is to get an up close and personal look at the products that have made your shortlist. Depending on what your high-want criteria is, you may want to schedule an initial phone/Web conference with the vendors. Many of them have demos that can be given over the Web. For example, if an easy-to-use interface for business end users is a key requirement of yours, you can get a look at the user interface in an online demo and potentially eliminate another product in this way.

Unfortunately, not very many of the companies offer demo copies of their software, especially those vendors with very high-priced packages. However, it is definitely worthwhile to ask if they have a demo version and are willing to send it to you.

Just about all of the product vendors are happy to fly to your location and present their product in person. Be sure to have them bring along a technical representative (a Sales Engineer) to answer your technical questions. Our experience is that you can schedule a face-to-face presentation with 1-2 weeks lead time. Plan to spend 3-4 hours with each vendor. Set the agenda ahead of time. We recommend providing them with a script to run through that will allow you to see how the product would work in your particular scenario. Be sure to schedule time to drill down on any technical issues you have.

Narrow Product Options to One or Two and Perform Rest of Due Diligence

Based on the presentations, you should be able to further narrow the options to two, or maybe even one product. It is likely that in your debrief sessions after the presentations, you'll likely have some open questions that you forgot to ask or that the sales representatives couldn't answer off-the-cuff. Pose any open questions and be persistent until you get satisfactory answers.

During this time, hopefully you will have learned enough about the products to be able to start envisioning how you would implement them. As a step in due diligence, we recommend obtaining a copy of the product documentation (especially if you can't get a demo copy of the product) and start thinking through, at least at a high level, on how you would go about implementing it. This process can uncover additional questions that you may not have thought of before. Plus, the ease at which you are able to find answers to your questions through the documentation is also telling about how your experience will be implementing it.

Compile Reference Questions And Contact References For Top Vendor(s)

Once you have your options narrowed to at least two, or even one, it is prudent to contact a few references for each. Most vendors can provide you with at least two customers that have implemented their product and are happy enough with it to tell you about their experience. Ask for a reference that has already completed an implementation, and ideally find someone who has similar needs to your own. For example, if you have big plans for personalization on your Web site, ask for a reference who is also using personalization.

While its only natural that these references will have mostly good things to say about their product, sometimes you're able to glean some additional information by asking certain questions, such as, "What do you like least about the product?" or "What were the surprises you ran into with the product that you didn't anticipate?" Drill down on any areas that you are lacking detail or confidence in from the information you've gathered so far. Even if you're already sold on a product, the reference calls are worthwhile and can at least prep you for what things might be more or less difficult than you anticipate.

Select and Purchase the Product

By this stage, you should be able to make a choice. If it is between two products, some factor will tip the balance, even if it ends up being a vote by the selection committee as a tiebreaker. Once the choice is made, you then enter into contract negotiations with the vendor. There are legal contracts,

service agreements, and various administrative issues to work through before you actually receive the software and can start working with it.

At this point hopefully everyone involved feels good about the decision. Ultimately, you will select the product that the selection committee feels most comfortable with, given all the criteria. While it is a big decision, keep in mind that in the world of computer software versions and entire products come and go, sometimes within a few years time frame. While you hope that your CMS is something that can grow and evolve with your organization, what you ultimately will gain from your first implementation of a CMS is a lot of valuable information about content management. That learning forms the basis for a content management approach to all of your communications. So, regardless of the particular package or the technology of today, you'll be worlds ahead of anyone who's still left in the world of random documents and flat files.