

How to Choose a Content Management (CMS) Platform

You need a new website that is both effective for your customers and manageable for your internal team. With so many aspects to consider, the process of selecting the right content management system (CMS) can be daunting. With the right approach, it doesn't have to be.

As premier partners with several of the leading CMS companies, we've helped hundreds of organizations select the best platform for their needs. In this white paper, we'll explore the steps you need to take, the questions to ask, and the pitfalls you need to watch out for.

Step-By-Step

Many platforms offer similar features and functionality. How do you get past the lofty claims and determine the best option for you? Here's your step-by-step guide to making an informed decision.

1

Engage stakeholders.

Start with the right people in the room. Include cross-functional stakeholders from the beginning of your process to capture their perspective and to generate buy-in. They will have a wealth of information about internal processes and customer needs. The more communication you have with this group, the more successful your project will be. Choose who to involve in the core decision-making team and who acts as a consultant.

2

Define and validate the needs of your customers today and for the future.

Now that you have your list of internal needs, focus on your current and potential customers. Some of the research and documentation we perform for a website project include:

- › **Persona definitions** – who are your best customers, what are their motivations and barriers? Be sure to include new audiences you may want to cater to in the future.
- › **User journeys** – how do they go about researching and making decisions? What channels and touchpoints do they encounter along the way?
- › **UX requirements** – what expectations do your target audiences have from your website?

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A successful website is consumer-centric. If you only consider the whims and desires of the internal team, your project will fail.

Develop detailed CMS requirements.

Much like you have your list of requirements when buying a house, you need CMS requirements to make the right decision. This document will act as a guide to select the right system with the right features. We've outlined some of the most common requirements below to help you think through your list.

- ▶ **Content Management** - Managing content will likely be the biggest use case on your website. The key thing to consider is your team's distribution and capabilities. Larger, more technical teams can manage a more complex CMS. Smaller teams with less expertise will want a simpler, easier to use interface. Features to consider should be:
 - ▶ Workflows – do you have an approval process to follow?
 - ▶ On-page editing – do you need a visual editor, or will a modular back-end work?
 - ▶ Global content – how much of your content will be re-used needing to be centrally managed?
 - ▶ Asset management – what are your needs for managing images and documents uploaded to the website? Is a third-party DAM platform necessary?

- ▶ **Personalization** – Content personalization delivers the right content to the right audience at the right time. It can offer relevant product/service recommendations that better align with your customers and prospects, leading to increased conversions. Determine what data you will use to create personalized content. Are your segments based on website usage or will you need to import customer data from a separate system?

- ▶ **Lead scoring, nurturing and marketing automation** – Many systems provide built-in support for these types of marketing activities. The out-of-the-box features might be enough for your needs. But if your marketing plans are more sophisticated, you should use a third-party such as HubSpot, Pardot, Marketing Cloud or others.

- ▶ **Ecommerce** – Ecommerce can be complex and will require detailed requirements around inventory, check out process, payment processing and many other factors. Begin mapping out the step-by-step process of getting your products online through fulfillment. How many SKUs do you offer? How many product options? Do you have an ERP system or shipping software to integrate? How is shipping calculated? What payment types do you take? Do you have product photos or videos?

- ▶ **Integrations** – You may have other systems to integrate into your website such as CRM. Outline each of these systems as well as which data points will be moving both into and out of the CMS.

- ▶ **Multi-site or multilingual support** – You may have a need for multiple websites. Many CMS features a multi-site instance that allows you to run many sites in one CMS. You may also need a multi-lingual website. Determine which languages and how in-depth the localization needs to be.

- ▶ **User roles and permissions** – How many different types of users will need to access the CMS and which features do they need?

- ▶ **Technical and development features** – Your IT or development team should outline their technical needs for custom development and hosting. Be sure to select a system with a rich developer community and well-supported partner programs to supplement your team.
 - ▶ Upgradability
 - ▶ Built-in staging
 - ▶ Internal API layer
 - ▶ API development support
 - ▶ In-house consultants
 - ▶ 24/7 support
 - ▶ External partners
 - ▶ Partner resources

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Request a product demo of each platform.

Now that you have your requirements and budget, sign-up for a demo of each platform. Put each one through its paces to see how your most necessary features work in the real world. It's at this point where you may start to prioritize your requirements as a "must-have" or a "nice to have". Make a list of pros and cons of each CMS so you can compare apples to apples. Regroup with your selection team and start the evaluation phase.

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Evaluate and decide.

Everything is in front of you, now you're ready to evaluate each system. Remember that your development costs are dependent upon the complexity of both the site and the CMS. You may need to prioritize or road map certain features or enhancements for future projects.

We find that selecting the right system usually boils down to three criteria: in-house skill sets and expertise, the number of integrations, and budget. If you zero in on those items, you can make the right pick.

Pitfalls To Watch Out For:

- The total cost of ownership is out of budget. Remember to include development costs, hosting, yearly upgrades, and ongoing maintenance.
- Not staffed to manage and upkeep the platform. Select a CMS which will be within the skill sets of your staff and your training budget.
- Not utilizing the platform. This typically happens around tools such as personalization, marketing automation, and lead scoring. If your team is not versed in using these tools, consider outsourcing to a marketing agency that can both create your strategy and execute it.
- Thinking about your needs today, but not tomorrow. Remember, the right CMS should grow with you – but be careful about being swayed by bells and whistles you'll never need.
- Not considering what needs to integrate with it. Make sure you know what other systems and data need to talk or interact with the website. Legacy systems, CRM, ERP, marketing automation or email platforms, E-commerce and many other solutions likely need to be integrated. The programming language and/or the way the CMS is built could either limit or facilitate integrations.

We are here to help!

Selecting a new CMS can be a huge undertaking and requires significant time and resources. A full-service digital marketing and technology agency like SilverTech, with dozens of certified Sitecore, Kentico, and Sitefinity developers and marketers, can help you along the way to make sure you get what you need from your investment.

If you need help selecting or validating your CMS choice, reach out to our team. We're happy to help.



About SilverTech.

SilverTech is a digital marketing and technology company redefining how businesses engage with their customers. Founded in 1996, SilverTech delivers digital strategies and solutions that connect user experiences with innovative tech to maximize results. With services such as digital consultation and strategy, website design and development, content management implementation, custom application development and full-service digital marketing, SilverTech provides an unexpectedly enjoyable experience to solving even the most complex business problems.

SilverTech has worked with national and global brands such as Segway, Drexel University, Nova Scotia Power, Fulton Bank, State of New Hampshire Travel and Tourism, and Conservation International.

For more information visit www.silvertech.com or email sales@silvertech.com.



Change the game.

Manchester Office
196 Bridge Street
Manchester, NH 03104
603.669.6600

www.silvertech.com

Indianapolis Office
9101 N. Wesleyan Road, Suite 400
Indianapolis, IN 46268
317.805.4376

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