

CONTENT MANAGEMENT SYSTEM VENDOR SELECTION GUIDE



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LONDON RESEARCH

ABOUT LONDON RESEARCH

London Research is focused on producing research-based content for B2B audiences. We are based in London, but our approach and outlook are very much international. We work predominantly, but not exclusively, with marketing technology (martech) vendors and agencies seeking to tell a compelling story based on robust research and insightful data points.

As part of Communitize Ltd, we work closely with our sister companies Digital Doughnut (a global community of more than 1.5 million marketers) and Demand Exchange (a lead generation platform), both to syndicate our research and generate high-quality leads.

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Linus, an experienced digital marketing and ecommerce analyst, is the Co-founder and Director of London Research, which was launched in 2017. London Research is a sister company to Digital Doughnut, the world's largest community of marketers and digital professionals, and also to Demand Exchange, an advanced B2B lead generation platform. Linus previously spent more than a decade setting up and building the research function at Econsultancy, a digital research and training company now owned by Centaur Media. After leaving Econsultancy, where he oversaw the production of hundreds of survey-based trends reports, buyers' guides and best practice guides, he launched ClickZ Intelligence for B2B media company Contentive. Linus holds degrees from the University of Oxford and Cranfield School of Management.



Introduction

Selecting a vendor for your organization's content management system (CMS) is a huge decision. It's essential to go through a well-planned vendor selection process and carry out the right due diligence to ensure you get the best fit for your business. Under-buying will leave you unable to achieve your objectives, while over-buying means paying for features for which teams are not ready, or which do not align with your digital strategy.

This London Research CMS Vendor Selection Guide, produced in partnership with Progress Software, aims to clarify the overall process and the individual stages you need to go through before you sign a contract with your chosen vendor.

We strongly believe that different types of vendor will suit different types of business; it's your responsibility to find the best match. This guide equips you with the tools and framework you need to make the right decision, giving you peace of mind that you've chosen the best vendor to meet your organization's needs.

The CMS in context

The CMS has long been a staple of digital marketing, and continues to be the cornerstone for successful marketing and commerce. However, what businesses require from their CMS has changed dramatically in recent years, making the selection process even more important.

Historically, a CMS enabled content to be formatted, assigned and delivered to the appropriate web page and website. But as the number of digital channels used by marketers to engage with customers increased, so did the number of places where marketers needed their content to appear. This resulted in the emergence of the headless CMS, which separates content creation from presentation, allowing content processed by the CMS to be delivered to multiple channels – such as mobile apps, voice assistants and digital signage – via APIs.

The problem was that this passed control of content delivery to IT, so any changes required by the marketing department had to be actioned by developers. This slowed down the process, increasing both IT's workload and marketers' frustration.

The next development was the hybrid or decoupled CMS. This created a low/no-code environment for marketers, giving them back a simple way to control changes to their content, while still allowing that content to be delivered across multiple channels.

The experience imperative

The quality of the digital experience a company delivers to its customers has become increasingly important for business success. A high-quality experience must be persistent and consistent across channels. It also requires the personalization of marketing communications – increasingly in real-time – based on data from across the organization, and delivered via whichever channel the customer is using at the time.

At the same time, the proliferation of channels is creating more work for marketers. In turn this puts pressure on systems to be as efficient and easy to use as possible for both internal teams and external partners.

All this is beyond the capability of your standard CMS, and has led to the emergence of the digital experience platform (DXP).

Forrester describes the DXP as “software to manage, deliver and optimize experiences consistently across every digital touchpoint.” At its heart is a CMS, but around it the DXP wraps other systems critical to the delivery of high-quality digital experiences. These allow companies to:

- enable true omnichannel capabilities
- integrate back-office applications
- streamline business process management; and
- establish measures around governance and compliance

The need for a digital experience strategy

Before you begin to assess which CMS best meets your needs, you should revisit and refresh your digital experience strategy, or develop one. Understand your customers' journeys throughout their entire lifespan and, at each touchpoint, identify their information needs and device preferences. Assess how these might change in the future as a result of emerging technologies and changing consumer behavior. For example, what role might smart speakers play in the experience your customers want from you in the future?

Your choice of CMS or DXP should then be informed by this strategy. If, for example, you only use limited marketing channels beyond your website, and you don't see that changing in the future, a traditional CMS may be sufficient. If, however, you're engaging with social media, web applications, CRM, ERP, commerce, and native mobile, as well as bringing together digital and physical experiences, you'll need a DXP. And if you see yourself moving into the world of prescriptive analytics, where artificial intelligence chooses and delivers the best next action for each customer in real time, a DXP will be an essential foundation.

Your digital maturity

As well as knowing where you're going – thanks to your digital experience strategy – you also need to understand where you are – your digital maturity. Be realistic. Identify the steps you need to take to execute on your strategy. Audit the experience you have in this area, and work out how much help you are likely to require.

This will guide your decision on whether to work with an agency partner in your choice of a CMS and its implementation; going it alone is not recommended unless your business is moderately to extremely mature in its digital experience. Your audit will also help you avoid over-buying CMS capabilities, as this leads to a more expensive and under-utilized CMS.

Who should own the CMS selection process?

Marketers have assumed greater responsibility for technology in recent years, and increased ownership and influence in the area of the CMS is a case in point.

Historically, the IT department – and, ultimately, the Chief Information Officer (CIO) – has typically been responsible for the CMS and its role in helping organizations to publish, manage and edit content. But as the web experience has become more of a fundamental component of the overall customer experience, and an increasingly important tool for marketing communication and lead generation, Chief Marketing Officers (CMOs) and their direct reports have become key stakeholders in the CMS selection process.

As a result, the CMS selection process should be a partnership between the marketing and IT departments. IT must ensure connectivity, compatibility and security, as well as the alignment of the chosen product with the company's martech strategy. Marketing must ensure they have full control of areas like content distribution, page creation, testing and personalization. The CIO and CMO (and their respective teams) should work together to ensure that the CMS meets the requirements of the organization from both a technical and internal user perspective, as well as providing the best possible experience for website visitors, both customers and prospects.

Ideally, if a company has a Chief Digital Officer, the CMS should reside in their department as part of their digital experience or DXP initiatives. It also makes sense – for organizations which have them – to involve Chief Experience Officers in the decision-making process. If a company has a Chief Marketing Technology Officer in place, it may be that this executive leads the process. Similarly, if a company has a Head of Content, then that person should be instrumental in ensuring that the most suitable CMS is selected by the business.

This guide is aimed primarily at marketers, notwithstanding the importance of technical considerations such as scalability, integration requirements and whether the underlying infrastructure is hosted on-premises or in the cloud. It is also worth adding that, in the case of ecommerce businesses, decisions about content management need to be taken in the context of ecommerce platforms, and vice versa.

The vendor selection process

Those selecting a CMS vendor (or, indeed, any technology vendor) typically need to go through the following stages:



An effective process for going through these steps can help you deliver the following benefits for your organization:

- Clear understanding of purpose within the organization
- Buy-in from internal stakeholders
- Clear articulation of project scope and objectives to potential vendors
- Consistent comparison and evaluation of suppliers
- Selection of the most suitable vendor based on your criteria

Build the business case for investment

There is no point embarking on a vendor selection process unless you have won the business case for investment.

The table below summarizes some of the potential benefits of a best-of-breed CMS for your business. Although viewing the CMS as a fundamental part of the DXP emphasizes its pivotal role in customer relationships, it is important to include the benefits to employees and partners in your analysis.

The key to success is to apply these generic benefits to your own business objectives and processes, so you can estimate as accurately as possible the potential upside in terms of increased sales and reduced costs in actual dollars, pounds or euros.



Benefits of a modern CMS

Increase revenue	Reduce costs	Enhance customer experience and loyalty	Improve measurement and data
<ul style="list-style-type: none"> • Boosting visitor numbers through improved customer acquisition • Better search engine optimization (SEO) and improved internal site search • Increased conversion rates leading to more transactions • Greater volume of content about products and services • Better organization and architecture of content • Shorter content-upload times • Increase customer journey insights and prescriptive recommendations for better conversions 	<ul style="list-style-type: none"> • Increased automation of processes • Reduced requirement for internal IT resources dedicated to day-to-day content management • Cloud-friendly technology that can scale without the need for re-platforming later • Reduced call-center costs through better online content and services 	<ul style="list-style-type: none"> • Enabling omnichannel distribution of content, including to social networks, mobile and wearable devices, web applications and partner networks • Offering a more intuitive digital customer experience • Supporting a high-performance website to reduce lag and latency, and increase reliability • Consistency of branding across different types of content and different platforms • Improved website layout and design • Support for customization and personalization 	<ul style="list-style-type: none"> • Understanding the value of content, for example the performance of individual articles or units, at all touchpoints, including those outside the company's website • Enable A/B testing to allow greater agility and innovation in delivering digital experiences • Integration with digital analytics platform • Mapping the customer journey • Creation of predictive and prescriptive insights via advanced analytics

Define internal CMS requirements

There is no point looking at the software on the market until you have thoroughly understood your own requirements. Technology on its own is rarely a silver bullet, so identify any internal constraints that could prevent you from realizing tangible benefits from better software.

You also need to carry out an inventory of the type of content being published, across all your touchpoints and engagement activities.

First and foremost, talk to the users. Gain a thorough understanding of how many CMS users you have, and their profiles. Interviews, workshops and surveys can all be used to elicit information about their needs.

Consider creating user scenarios or stories that can surface the challenges internal users are facing, and also the opportunities that a better CMS could bring. These scenarios can also feed into the RFP document later in the vendor selection process.

The most important part of this process is to align your CMS needs to your business objectives, your digital experience strategy and your technology strategy. Think about where your business is going, so that you can choose the right vendor to support you on your journey, rather than deciding on the basis of needs that might soon become redundant. At the same time, thinking this way will help you avoid buying features your teams aren't ready for, or which aren't essential to your progress.

Questions you should be asking at this stage include:

- Do you have a small number of users who can be trained to get maximum value from a feature-rich CMS, or do you have a large number for whom simplicity is the over-riding criterion?
- Do you need to manage multiple languages and sites to support a global/multi-regional footprint?
- How do user requirements vary in different geographical regions?



Working with an agency partner

Whether you choose to work with an agency or partner to implement your new CMS depends on the complexity of the deployment and the IT resources at your disposal. The more customized the system and the more challenging the integration with the rest of your martech stack, the more likely you are to need external help. Working with an agency partner is also highly recommended if you are changing from a traditional CMS to a DXP.

If you already have an agency on board as a trusted advisor, take a look at their recommended solutions first. If you don't, but you plan to appoint one to help implement your CMS, consider either appointing them first and reviewing their supplier recommendations, or getting the perspective of possible agency partners in advance. Keep in mind that some agencies will specialize in working with one or more particular vendors.

As noted earlier, implementing a new CMS in-house is only recommended when your IT team has significant experience in the area. It is also important to look at the whole picture; how big an impact will your implementation have on the rest of the IT department's workload, and how will that affect other parts of the business?

The flipside is that working with an agency or other partner will speed up the deployment process, and can help you leapfrog your competition.

The request for information (RFI)

In putting together your initial "long list", ask your professional network to recommend vendors worth investigating, as well as carrying out desktop research into the more obvious suppliers to gain a good understanding of what is on offer.

Look at online business software reviewing services such as G2 Crowd (Grid Reports), TrustRadius and SoftwareReviews to find out what customers are saying about their CMS vendors' technology and broader business capabilities (e.g. customer service). Other useful enterprise resources include analyst content such as the Forrester Wave reports.

Buyers can also consult the Digital Doughnut website for background information on CMS trends, and for whitepapers published by vendors.

Resources from Progress Software include:

Engaging Omnichannel Experiences Are the Key to Competing—And Winning

[VIEW](#)

The Evolution of Digital Experience

[VIEW](#)

Digital Experiences in 2020 Infographic

[VIEW](#)

Decide the shortlist of vendors

For practical purposes, it makes sense to consolidate your list of vendors as much as possible before sending out a detailed Request for Proposal document and carrying out more robust comparisons.

At this stage you should be able to weed out unsuitable vendors. They may lack core or specific capabilities that are necessary for your particular requirements; they may not have the necessary business credibility and case studies; or they may not be set up for your type of business.

Consider whether you need something “turnkey”, or something very customized to your requirements. Turnkey CMSs are usually identified with small companies, while more customized options are associated with enterprise businesses, but that’s not the whole story. Businesses from mid-size up to small enterprise can excel with a turnkey CMS. The decision depends on a number of factors:

- the type of CMS you feel you need (traditional, decoupled or hybrid)
- how many channels you intend it to encompass, immediately and in the foreseeable future;
- the size and complexity of the marketing stack with which it needs to be integrated; and
- your company’s digital experience maturity, and its competencies for adopting the additional capabilities.

These factors will also help determine whether you’ll require a partner agency for successful implementation.

Making an initial assessment of potential suppliers’ professional services capabilities is also highly recommended. Complex implementations can be challenging if you have limited internal resources, or if those resources lack experience of handling such tasks. If the relationship is likely to be high-touch, rule out suppliers who don’t have an office in your country or time zone.



The Request for Proposal (RFP)



The information below provides high-level information about a Request for Proposal (RFP) document. This is the culmination of the internal planning work that has scoped out your CMS requirements so you can find the most suitable vendor.

The RFP process – as distinct from the RFP document specifically – can be used to describe the end-to-end project, starting when you have won the case internally for investment in a CMS and ending when you have agreed commercial terms with a supplier.

When thinking about the RFP document specifically, make sure you include the following:

- Introduction
- Process and timelines
- Business overview and context
- Detailed requirements, specifications and selection criteria
- Assumptions and constraints
- Budget
- Terms and conditions

Requirements, specifications and selection criteria are clearly intrinsic to this document, and this is where the work you have done internally pays off. You can also include usage scenarios to help you sort the wheat from the chaff.

Vendors should also provide information about their preferred agency partners, if a separate implementation partner is going to be required, and about their product roadmap or digital strategy.

When the document is completed, RFPs can be posted, emailed or posted on your own website or even a third party's.

Note that this document is typically distinct and more detailed than a Request for Quotation (RFQ) which is specifically geared towards making a comparison of pricing based on stated requirements. An Invitation to Tender (ITT) document, commonly used in the public sector, is a more exhaustive document than the RFP. The ITT will thoroughly outline the scope of the project, including both technical and business requirements.

Evaluation of shortlisted vendors

The aim at this stage is to find the vendor who most closely meets your detailed requirements, as defined in the RFP document.

You should invite your shortlisted vendors to pitch their offering and present their software, so you can meet them in person. It may make sense to schedule a day or half-day session when the relevant internal stakeholders can block out time so they are also available.

You should create a requirements matrix, (see our example on page 15) that is appropriate for your needs in terms of your chosen criteria for scoring and even the scoring system. This can be completed after you have digested prospective suppliers' RFP documents and seen them demonstrate their software.

Our suggested 17 main criteria are as follows:

1. End-user experience

Straightforward, efficient, relevant and consistent; the quality of the consumer experience a brand delivers has become a crucial point of differentiation from its competitors. Brands need to be able to deliver the right content to the right person at the right time via the right channel. That requires a 360-degree view of that person and all the brand's previous interactions with them. Brands also need to deliver their content seamlessly across all channels in order to avoid customers losing trust in the experience. If your CMS can't handle these fundamental requirements, nothing else on this list matters.

2. Back-end UI

An intuitive user interface is probably the second most important selection criterion for any business choosing a content management system, given the amount of time that can be wasted – and frustration caused – by platforms that are not user-friendly. Heavy internal users of the CMS should be consulted on the attributes they would like to see in a new platform, but obvious ones include low/no code functionality and straightforward image editing and uploading.

3. Workflow

A modern CMS should enable administrators to track, manage and approve content through different stages of the publishing process. You may want to define and assign multiple workflows based on topics, languages and authors. Role-based user levels and archiving of comments are all important features of workflow capabilities. Version control ensures that CMS users are not working on the same piece of content at the same time.

4. DAM

Digital asset management (DAM) can be regarded as a discrete and adjacent area of marketing technology, but it is something that many vendors have incorporated as part of their CMS platforms. As the name suggests, DAM functionality enables CMS users to store, organize, find and share digital content such as images, video, audio and text.



5. Personalization

The ability to serve personalized and relevant content is becoming increasingly important to companies, as consumers become less tolerant of a blanket approach that doesn't take their own specific interests and behavior into account. A modern CMS must allow personalization through the creation of user personas and the ability to segment users based on a plethora of data sources, ranging from purchase history and CRM data to referral and search keyword information.

6. Responsiveness

Customers have long been more likely to view content from a mobile device than from a desktop PC, so basic responsive capabilities across channels are now table stakes. The next level is being able to deliver equally great experiences for progressive web apps (PWAs) and hybrid apps, which are a combination of native and web apps.

7. SEO

Like responsive features, search engine optimization (SEO or organic search marketing) is now something that CMS platforms very much cater for, though also to varying degrees. Search-friendly URLs are now commonplace, and thankfully the days of meaningless and unfeasibly long web page addresses are almost over. Other SEO-related attributes include the creation of sitemap xml files and support for canonical URLs, which, put simply, allow you to indicate to search engines that certain similar URLs are actually the same. More advanced capabilities include being able to prescribe actions to improve UX and SEO.

8. Support, training and partner ecosystem

Support and training are essential if you want your chosen CMS platform to run as efficiently as possible. It is also important to know there is someone you can pick up the phone to at short notice when things haven't quite gone to plan.

Make sure there are agencies and delivery partners with the technical knowledge around your chosen CMS and its underpinning technology (e.g. .NET) to help deliver what you require, including any customization. The more bespoke your platform, the more likely you are to need support, either directly from the vendor or from your agency partner, if you are working with one. When booking the demo or pitch, insist that your account manager should attend, as they will keep the salesperson from over-promising.

9. Multi-site management

Some brands will need to be able to operate multiple – and sometimes completely independent – web properties, often with different groups of developers working on them. Choosing a CMS that can handle this situation should save money, as well as simplifying any interactions between the sites, such as content sharing.

10. Internationalization

Whether you are a global organization or a small business with aspirations for more cross-border business, the ability of your CMS to function across different markets and languages could be critical. You may have different website set-ups in different countries or a single corporate site in different languages. Multi-site and multi-language support, translation management and time zone functionality are all important features that need to be considered.

11. Analytics and reporting

It is obviously important to understand how your campaigns are performing against key metrics and performance indicators. However, as the need to provide customers with more personalized engagement grows, it is becoming increasingly critical to be able to move from this rear-view mirror type of reporting to predictive and prescriptive analytics which surface insights and trigger actions for future campaigns as part of wider marketing automation activities. The use of machine learning to analyze a plethora of data sources and provide this forward-looking evaluation and recommendation is becoming an important point of differentiation for CMS vendors.

12. Omnichannel delivery

In the context of a CMS, this means the ability to deliver your content seamlessly across different channels and devices – such as email, social, and mobile apps – via APIs. Other specific attributes here could include marketing campaign automation, the ability to schedule and deliver newsletters, the ability to embed social feeds and to publish directly to social platforms.

13. Development

The marketing team aren't the only people who have a vested interest in the company's choice of CMS. Work with your CIO or CTO to ensure you choose a system that meets the requirements of the developers who will deploy, maintain, upgrade and extend it. Questions to consider include whether you want your CMS hosted on-premise or in the cloud, whether it supports continuous integration and continuous deployment/delivery of new software, and whether it offers the integrations your existing martech stack – and your development strategy – require.

The choice of software framework may be key. For instance, a .NET Core platform clears the way for the development of cross-platform apps, allowing a dev-ops team to work on the operating system of their choice. This eliminates the need to hire additional programmers or to purchase additional hardware. Other platforms could be preferred as well.

14. Security and compliance

Your CMS needs to do two things. It has to protect both your data and your wider software infrastructure from malicious intervention, and it has to make it simple for you to comply with legal requirements around data storage and use, for example GDPR and CCPA. This is another area where the involvement of your CIO or CTO is critical to the decision-making process.

15. Integration

The ability to integrate with other technologies within your company is likely to be a key success factor. Find out how easily you can connect with the rest of your martech stack, for example CRM, marketing automation and ecommerce platforms, and whether there are standard APIs or more complicated customization requirements. Look too at how straightforward it is to connect to the systems used by other departments, such as sales, supply chain management or BI. It's also important to see what level of integration is required with the systems used by your partners or agencies. Again, it makes sense for your CTO or CIO to be heavily involved in defining your needs.

16. Ecommerce

Ecommerce is relevant for all businesses at some level, not just those with a product catalog. Because a transaction is the desired conclusion of the journey that starts with marketing, it's essential that the integration between ecommerce and content is absolutely seamless. Data from the consumer journey should enable the ecommerce experience to be tailored precisely, maximizing the chance of conversion. After the transaction, the handing on of the customer to after-sales should be equally transparent, so that post-sale customer care content can be personalized too.

17. Vendor roadmap

Make sure that your chosen vendor has a roadmap that matches the demands of your business strategy and recognizes developing technologies such as machine learning, which is already being harnessed for marketing optimization and content creation. You also need to be certain that they are able to respond quickly to changes in consumer behavior.

As well as the features outlined above, you should also consider whether vendors boast other adjacent capabilities such as email marketing, marketing automation, lead scoring and A/B testing.

There is a skill in teasing out whether vendors really have the capabilities in question, and it is not necessarily binary. If vendors are given a "yes" or "no" choice when asked about a specific capability, they will typically go for the affirmative option even if that feature has not yet been released (or sometimes even planned).

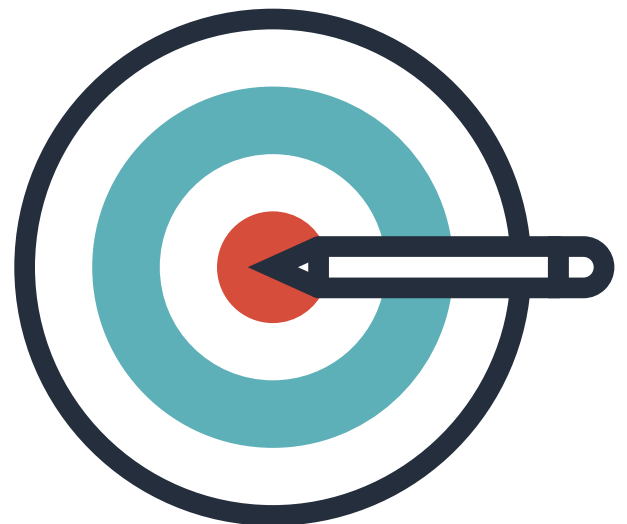
Read between the lines and make your own call on whether the vendor is suited to a particular requirement. The matrix is a useful tool for assisting your selection process but should, ultimately, be your servant and not your master.

Scores given for each capability can always be a matter for debate, but, at worst, any disagreements and discrepancies can help to further the discussion about the true critical success factors.

Select your CMS partner

Your evaluation of shortlisted vendors and your due diligence have surfaced the most appropriate vendor for your needs. You can now commence your contract negotiations after any necessary fine-tuning of scope and requirements has taken place. If you have them, your procurement and legal teams will be involved to ensure that there are no unwelcome surprises further down the line.

Ideally, there should be a discovery phase to ensure that the terms of the contract are realistic for both parties, and to ensure that the specification document is as definitive and accurately defined as possible.



Vendor scoring matrix

CAPABILITY	SCORES (0-10)					
	Vendor A	Vendor B	Vendor C	Vendor D	Vendor E	Vendor F
1. End-user experience						
2. Back-end UI						
3. Workflow						
4. DAM						
5. Personalization						
6. Responsiveness						
7. SEO						
8. Support, training and partner ecosystem						
9. Multi-site management						
10. Internationalization						
11. Analytics and reporting						
12. Omnichannel delivery						
13. Development						
14. Security and compliance						
15. Integration						
16. Ecommerce						
17. Vendor roadmap						
TOTAL SCORE	A	B	C	D	E	F

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