A MODERN GUIDE TO SELECTING A CMS

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In 2022, the number of websites using a CMS rose to 67%. (Tech Jury) More companies realize the importance of having a dedicated content management system to stay competitive. And today, more companies are switching to different alternatives.

As the demand for CMSs has grown, so too has the supply. There are more options than ever when selecting a CMS, which can be a challenge as much as a benefit. The diversity of CMSs today means that customers have a wealth of options, but finding the right CMS can be a complex process.

And finding the right CMS is important. Otherwise, you likely are experiencing pain points like those found by a recent Content Science survey.

content updates were difficult or slow	53%
high dependence on developers	43%
scalability or performance issues	40%

This guide will help you take a smart approach to selecting your next CMs by outlining how to:

- Identify your organization's needs.
- Clarify and communicate risks of making the wrong choice.
- Find and evaluate CMSs with potential to meet your needs.
- Reach consensus on a CMS selection.

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5 Signs It's Time to Change Your CMS Approach

Assessing your needs and obstacles is an important first step when considering purchasing or changing a CMS. But some common obstacles many content creators face indicate it may be time to make a change.

1. **Do you have multiple CMSs?** Juggling two or more content managementsystems can lead to inefficient workflows and confusion amongst your staff. Keeping your content in a centralized repository, available to all relevant staff, promotes transparency and streamlined workflows, which lend themselves to efficient and effective content creation and management.

2. **Is publishing content difficult or slow?** If publishing your content has become difficult or slow, your production process is possibly bottlenecked by your CMS. A CMS suited to your individual needs should streamline the publishing process, not hinder it. If you're finding it difficult to publish your content efficiently and on time, it may be time to considera change.

3. **Is your content secure?** Security is one of the most important aspects of any CMS solution and should be a significant factor when making a selection. Having a provider who observes SOC2 standards, is ISO certified, and has been audited by the CSA shows due diligence and a commitment to keeping your content secure. If you feel your content is insecure, that may be reason enough to consider making a change.

4. **Can you repurpose existing content?** Repurposing and reusing content is no longer optional for content professionals. The sheer variety of channels consumers use to access content means that all of an organization's content must be compatible with multiple formats. Multi-tenant infrastructure, software that enables multiple cus tomers to use the same instance of a software, promotes unified access to a single repository of content that can be repurposed to your needs. This often comes with cost savings for the CMS provider that is then passed on to the customer. If your content team is spending too many hours repurposing existing content for different channels and sites, consider switching to a CMS option capable of taking some of this burden off your team. Multi-tenant infrastructure allows different team members to share one, unified source of content.

5. **Is your CMS compatible with other tools, tech, and AI?** As an organization grows and its needs evolve, adopting new tools and technologies becomes increasingly important. Your CMS must be effective enough to fulfill your needs and versatile enough not to slow the adoption process. Is your CMS holding you back from adopting new technology? Do you have to sacrifice one of your favorite tools to use a CMS? Is your CMS API-first, allowing you to develop and integrate tools as you need? Does your CMS offer compatibility with popular tools that are now industry standard? Don't let your CMS hold you back from considering new technology. Seek out a new CMS that can fulfill all your needs.

After evaluating the broader criteria listed above, it's time to evaluate the needs of your staff and the impact a new CMS will have on their processes. Transitioning to a new CMS is a significant decision that will impact a diverse range of stakeholders within your organization.

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The Importance of CMS to Diverse Stakeholders

Content management systems have diverse capabilities that can equip various organizational stakeholders to effectively accomplish their objectives. One of the most valuable aspects of a quality CMS solution is its ability to facilitate stakeholder teamwork.

Marketing Stakeholders	Marketers need to access the content produced by your creators to effectively publish and promote it on the web. A quality CMS makes content easy to organize, find, and publish. Headless CMS options make publishing existing content on multiple platforms much easier and reduce the workload of content creators and marketers.
Customer Experience and Success Stakeholders	Customer interactions have shifted to being conducted digitally. A CMS should help facilitate this experience, never hinder it. The right CMS can yield incredible benefits when managing external communications like webpages, email campaigns, brochures, and other promotional materials. Materials sent to promote the customer experience often go through many levels of drafting, approval, and revisions. A CMS that enables transparency can help your customer experience stakeholders identify how communications need changing and where the final versions of their materials are. Managing these materials through multiple email chains, Google Docs, and content repositories is a challenge and an unnecessary one at that. The world of content management systems has expanded to provide value to customer experience stakeholders and equip them with what they need to execute their responsibilities. Properly integrating a CMS into your Customer Relationship Management system is a powerful benefit for customer experience and success stakeholders. Inputting data on how customers interact with your content directly into your CRM system is a streamlined way to ensure that your CRM's data is constantly updated and providing you with the most effective information.

Sales Stakeholders	Sales is a highly involved and personal process that often demands significant follow-up and multiple exchanges of information. Salespeople need easy access to the right materials to provide the right information to a prospective customer.
	Losing a sale over an employee not being able to access the right materials is an unnecessary risk in the modern world of CMS solutions. Some content management systems even recommend materials to send to an interested party based on their needs. Modern CMS solutions cater to a wide variety of sales-based needs.
HR Stakeholders	Human resource content management systems enable your HR staff to store, organize, and access employee information and materials for internal communications. HR staff need the ability to distribute relevant information among your employees, and this isn't easy to do when juggling multiple or sub-par systems.
	As key members of the recruitment process, HR stakeholders need quick, easy access to important materials. Recruitment content, such as employee guidelines, benefits explainers, and company education materials are all vital to the recruitment and onboarding processes. Slow and complicated access to your organization's content can hinder these external responsibilities.
	More than most stakeholders, HR staff value security. The sensitive information managed by your HR personnel must be secure and only accessible to approved staff members.
Communications Stakeholders	Communication stakeholders need to be able to find and distribute important information. Whether it's internal communications with existing employees or external communications for public relations, these stakeholders need to stay informed to inform others.
	The organizational benefits of a CMS make staying informed easy and reliable. And when your communication staff feels informed, so will the internal and external stakeholders relevant to your organization.
IT Stakeholders	Your IT stakeholders should feel ample benefits from choosing the correct CMS. As we've already mentioned, the right CMS should have substantial security measures in place that your IT staff can monitor. Additionally, a CMS for IT professionals makes managing your content delivery network a breeze and promotes easy, permission-based access for other stakeholders.
	The right CMS streamlines IT processes for evaluating performance and identifying areas of improvement. When these areas are identified, your IT staff, or even your content creators and marketers, are able to fix the problem quickly and efficiently.

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Development Stakeholders

One of the key benefits of a CMS is that it reduces, or even eliminates, the coding knowledge required to manipulate materials and web pages. Your developers should be focused on optimizing and maintaining your organization's software, not repurposing and publishing content.

Additional API layers separating the front and back ends of a CMS solution empowers your marketing staff to manage and update your organization's publishing channels without developer input. This frees up the time of your developers to focus on tasks only they can handle.

▶▶ Many stakeholders stand to benefit from choosing the right CMS. But choosing a CMS presents its own challenges today. Let's explore what they are and how to overcome them. ◀◀

Top 3 Challenges to Selecting a CMS Today

Every organization faces its own challenges when selecting a CMS. But there are three key challenges that most organizations commonly encounter.

1. Knowing the Options
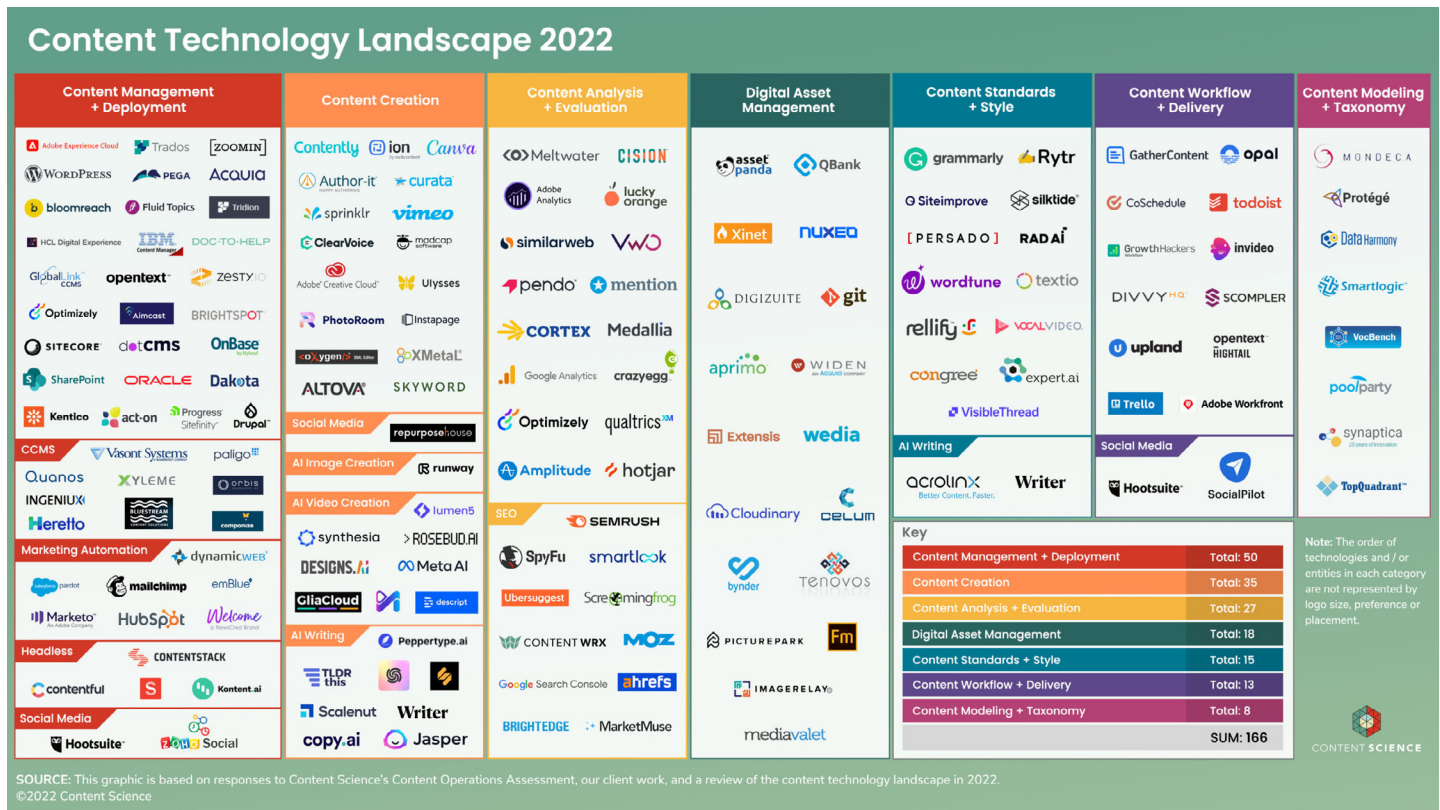
Every year, new CMS solutions are entering the market, each with its positives, negatives, and costs. Simply sorting through all the options can feel like a full-time job, and that's without even assessing their respective strengths and weaknesses.

Hundreds, possibly thousands, of CMSs are available today, which can make compiling a consideration group a challenge.

And then assessing your consideration group after it's been compiled is a challenge of its own, involving significant back-and-forth with CMS providers, going through testimonials, creating pros and cons lists, and demoing products.

Content Science recently surveyed content professionals to determine their CMS selection process. When asked about decision-makers in their process, a participant said: **"They have no preconceived notions of how they want this built. They just have an idea or a need they want fulfilled."**

You aren't alone if you're unsure about the options and your needs. This is a commonly encountered issue for many people considering a switch to a new CMS provider.

2. Sorting Through the Hype

There are many buzzwords surrounding CMS solutions aimed at promoting the idea that a company's CMS is the most top-of-the-line, efficient, AI-powered piece of software ever created. However, buzzwords don't generate value for adopters.

Different CMSs perform different functions for different organizations. Some of the most commonly encountered types of CMS solutions you might encounter include:

Open-source CMS:	Close-source/ Proprietary CMS:	Headless CMS:	Hybrid CMS:
An open-source CMS has publicly available source code that users can tailor to their needs depending on the license agreement. Many content professionals love the benefits of modifying their system to their specific needs. If your open-source CMS allows third-party plug-ins, be sure that they are validated by your provider or your content may be at risk of being breached.	This type of CMS often has solutions tailored to specific industries like real estate or medical technology companies. The purpose-built nature of these solutions can be highly appealing to customers, despite their lack of flexibility. Proprietary CMS solutions promote more security as well.	Headless CMS solutions are great at repurposing existing content for publishing on various platforms. "Headless" can be a bit of a misnomer as these solutions tend to have many heads, each dedicated to a specific channel. When researching headless CMS solutions, it's important to find out which options are truly headless and which are simply integrating features similar to the ones provided by headless CMSs.	Like headless CMS solutions, hybrid CMS solutions eliminate the problems creators and developers face when publishing on multiple digital channels. However, hybrid CMSs have a lot more variety in how they are defined.

Some have APIs grafted onto existing platforms to separate the front and back ends. Others offer the full functionality of a headless CMS with the ease-of-use of a traditional system. When evaluating a hybrid CMS solution, be sure you understand what the provider is offering and how the solution works to ensure you are making the correct decision.

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3. Aligning Diverse Stakeholders

Regardless of which CMS you choose, you need to make sure your choice aligns with the needs of all your stakeholders.

Depending on your organization's content processes, stakeholders in the CMS selection process vary in number and diversity. What does not vary, however, is the importance of their input.

This step may cause tension within your organization, with each type of stakeholder vying for you to prioritize their needs in your search. But if your organization does not reach consensus across stakeholders on the CMS selection, you're at risk for a poor implementation, reduced adoption, and even having different departments or stakeholders get their own CMS.

In Content Science's CMS survey, many participants noted the importance of having a CMS that fulfilled multiple functions. One participant said, **"The features and functionality have to fit for purpose. They have to fulfill all our generally important needs."**

Don't undercut the value of switching CMS solutions. When making the switch, find an option that fulfills the needs of all your stakeholders.

Assessing Your CMS Needs

▸ **How do I determine what I need from a CMS?**
▸ **How do I know what I'll need in the future?**
▸ **How do I rank the importance of my needs to inform my decision-making?**

These are all valid questions. Assessing your needs for a CMS is a long, involved process requiring much internal analysis. We've researched the needs of the people using a CMS and compiled a list of questions to consider in order of importance.

Authoring

✓ What are the processes, and who are the employees behind how my organization creates content?
✓ How in-depth is the content my organization creates? Do I need to provide statistics, graphics, or supporting evidence in the content?
✓ What platforms will I publish my organization's content on?

Security

✓ How sensitive is the information in my organization's content?
✓ Are there any legal concerns regarding my organization's content? (Confidentiality, NDAs, Hippocratic or financial privacy)
✓ Is my organization's content a target for hackers?

Reporting

✓ Does a regulatory body oversee my organization's content?
✓ Who will I present my organization's content to, and in what forum?
✓ What is my organization's primary audience, and how will I report information to internal stakeholders?

Integration

✓ What new tools and technologies do I hope to adopt in the future?
✓ How will this new CMS affect current operations?
✓ What indispensable technologies is my organization using now that need integration into a new CMS?
✓ (If considering AI adoption) Does this CMS have AI tools, or is it compatible with the AI tools my organization is considering?

Your organization might want to go beyond these questions to assess your needs. After gaining insight into what your stakeholders seek from a CMS, you can start the selection process.

5-Step Process for CMS Selection

Selecting a CMS is no small thing and you should treat it with great care by all stakeholders in the selection process. We have broken down the CMS selection process into four broad steps.

1. Align on Objectives + Priorities

Meet with your internal stakeholders and hold an open conversation (or two or three) to prioritize CMS needs. If your IT department becomes overloaded with website management, pursue a CMS that empowers content creators and marketers to manage it. If you need total control over how a piece of content is presented on multiple channels, then perhaps a headless CMS is what you need.

Also identify the right priority use cases. Dig deep and meet with your stakeholders to determine where the bottlenecks and hurdles are and how a CMS can reduce or eliminate them. Also pay attention to how customers navigate and find your content. Your customer experience and success stakeholders will be key in determining how your content can be better managed to encourage a better customer experience.

2. Open the Consideration Set

Opening your consideration set means not shying away from different options.
Do you need an established CMS with a dedicated support staff to answer questions and troubleshoot problems? Do you need a more specialized CMS that can fulfill specific but significant needs? Do you need a CMS with built-in tools that allow different stakeholders to perform various functions?

A recent survey of diverse professionals involved in purchasing a CMS revealed a surprising insight.

71%

of those professionals evaluated less than five CMS platforms

AND

69%

relied on word-of-mouth or a colleague's recommendation to find a CMS.

Beginning the process with such a narrow focus at a time when more and better CMS options exist than ever puts your organization at risk of an opportunity cost.

Word of mouth is a perfectly fine way to start your research, but go deeper to find the solution best suited to your needs today.

Search for solutions that specialize in the objectives and priorities established in the previous steps. You can even go to your favorite website and determine their CMS. Sometimes a website includes a footer with the name of their CMS. Sometimes a CMS's homepage advertises that website as a client. Some websites and tools allow you to ethically analyze a website to determine its CMS

3. Do the Research

Once you've met with your stakeholders, assessed and prioritized your needs, and compiled a list of possible solutions, it's time to research which CMS best fits your organization. This is an involved process that requires a significant investment of time by your decision-makers.

Gather Relevant Information

Luckily, the digital age of content has created a cornucopia of information related to CMS solutions. Of course, many CMSs have their own websites with a range of details. Take the time to research testimonials from a CMS's customers. **What are the customers saying the CMS accomplished? What problems did they experience before adopting it? What new opportunities are they finding because of the CMS? Is there anything a customer wishes were included in the CMS that may be relevant to your organization's needs?**

Also consider third party resources like these:

- Capterra is an online marketplace that acts as an intermediary between vendors and customers. Capterra offers many resources to help inform customers and make the best decisions when selecting a new technology.

- Content Science Review has a wealth of guidance and resources dedicated to content technology, stakeholder needs, and the importance of content management.

- CMSCritic offers tons of in-depth, impartial reviews on different CMS solutions that can help you narrow down your options before conducting a pilot.

- Gartner is an esteemed technological research and consulting firm that offers insights into technology solutions for organizational issues and improvement. They are known for creating comprehensive reports about various technology offerings.

- Stack Overflow is a fantastic technology site with forums, informational articles, and other resources for engineers and developers.

- The Content Advisory is a consulting firm that takes a holistic approach to improving an organization's content. They cover every step of the content process from creation to management.

- CMSWire is a digital publication covering digital customer experience methodologies, tools, and operations and providing great information about CMS solutions.

- G2 is a peer-to-peer review site that gives you honest customer feedback on the effectiveness of different technology solutions for content management, marketing, and more.

- Real Story Group is a digital workplace and market technology analyst firm specializing in omnichannel content decisions.

4. Narrow the Consideration Set

Request a Tailored Demo

This step is best reserved until your consideration set has shrunk to a manageable size. The best thing about tailored demos is the ability to ask specific questions relevant to your organization's needs. When requesting a tailored demo, try to loop in high-level stakeholders from various departments like your heads of IT, HR, and sales. Even if they can't attend the demo, ask them to compile a list of questions about how the demoed CMS can provide value to their staff and eliminate hurdles in their workflow.

Tailored demos are the best way to determine how a CMS solution could provide value to your organization. While they are one of the most time-consuming ways to research options, no other method has the same degree of personalized information.

5. Conduct a Pilot

Testing a CMS solution and evaluating how it handles your organization's priority use cases is the final step to selecting a CMS. Look for vendors that offer free trials and proof of concepts to ensure the platform you're considering fulfills the needs of all your stakeholders. Be sure to meet with your stakeholders before deciding on a solution to pilot to determine the best way to integrate this trial period into their current processes.

Before conducting your CMS pilot, define your measurable goals and objectives for using the CMS. **What processes are you trying to speed up and by how much? How many requests for help do you currently have between stakeholders and how many are you aiming for? How long does it currently take you to publish content and how much would you like that time to be reduced?**

> Knowing what to evaluate is an important part of any CMS pilot. It will also give you comparable data, should you choose to pilot more than one solution.
>
> During this pilot period, evaluate how the CMS enables your staff to leap hurdles, eliminate roadblocks, and remove bottlenecks from their processes.
>
> Pay close attention to which staff members receive the most and least benefits from the CMS. If your priority use cases are not met in a satisfactory way, it may not be the right solution for your organization. But if your organization is experiencing widespread, significant benefits, you may have a winner!
>
> In addition to asking stakeholders to rate the CMS against priority use cases, take the time to meet with the stakeholders and get their impressions. While efficiently addressing priority use cases is important, it's also important not to sacrifice the well-being of one department for the sake of another.

Facilitating a stakeholder consensus might sound difficult, but it is achievable. Setting up your pilot with clear goals is a great start, but you might need to do more. Just remember, the time you invest in facilitating consensus up front will pay off with a smoother CMS implementation and widespread adoption. Here are some tips on how to facilitate a consensus:

- ✓ Encourage department heads to communicate the positives and negatives they're experiencing during the pilot.
- ✓ Encourage anonymous evaluations from boots-on-the-ground staff that make and use your organization's content.
- ✓ Brainstorm interdepartmental methods to solve problems not being addressed by the new CMS.
- ✓ Encourage departments or teams to evaluate whether the piloted CMS meets their priority needs.
- ✓ Distribute detailed information about the CMS to departments so they can understand the ins-and-outs of the new solution.
- ✓ Offer training on the new CMS to ensure stakeholders are using the piloted solution effectively.
- ✓ DON'T buy in to the sunk cost fallacy if the stakeholder consensus is generally negative.

Conclusion

Assessing your needs, deciding to switch, researching your options, facilitating a consensus, and conducting a pilot is a long process requiring great levels of effort and collaboration.

But the potential payoff is worth it. Using a CMS that fulfills and adapts to all your needs is a valuable organizational tool that yields dividends for all stakeholders and promotes a great customer experience.

There's no need to continue if you're struggling with your current CMS. Make the decision, get informed, and execute a change that will make your organization's content the best it can be.

Handy Glossary of CMS Terms

Learn about these terms to understand CMS offerings and assess your organization's needs. All of these terms are commonly encountered in the learning process and will help you learn about what a specific CMS can do. To learn about more CMS terms and continue your education on the solutions available, read dotCMS's guide, CMS Terminology 101.

GLOSSARY

- » **API:** An API — application programming interface — is a way to simplify communication between two separate systems to share data and functionality. APIs have grown in recent years because they enable websites, mobile apps, IoT devices, and more to connect with CMSs and other backend systems. The most common set of standards for APIs were REST and SOAP, but many modern APIs are following the GraphQL approach.

- » **Authoring Environment:** The authoring environment is the capabilities a CMS has for creating, managing, and editing content or digital experiences. Many modern CMS solutions include visual or WYSIWYG interfaces to streamline the workflows of content authors. While headless CMSs often have limited authoring environments, hybrid solutions like dotCMS provide innovative authoring tooling.

- » **Decoupled CMS:** A decoupled CMS – similar to a headless CMS – separates the authoring and delivery of content. The main distinction is that these systems typically offer additional templating tools and facilitate authors in preparing content for publishing, but it's still up to developers to create the frontend presentation layer themselves.

- » **Digital Asset Management:** Digital asset management (DAM) is a system for organizing and retrieving digital assets such as photos, audio, and video and other media. Enterprise companies have a large number of digital assets, so they need a system in place for tagging, indexing, and searching through this vast data store.

- » **Digital Experience:** A digital experience is an interaction between a brand and its customers. With customers demanding interaction on numerous devices and touchpoints, digital experiences have been at the forefront of modern digital marketing. For many companies providing digital experiences has evolved into omnichannel marketing.

- » **Hybrid CMS:** A hybrid CMS combines the authoring experience from a traditional CMS with the API-driven content delivery of headless CMS or decoupled CMS. This means developers can create a variety of frontend presentations while still allowing marketers to manage content effectively.

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GLOSSARY

» **Headless CMS:** A headless CMS removes the presentation layer of content management completely. Authors can create and edit content within its interface, but it's up to developers to proactively build a frontend and retrieve the content via APIs. And because the CMS isn't aware of the frontend at all, the authoring environment is usually form-based and lacks contextual editing.

» **Open-Source Software:** Open-source software (OSS) is software with source code that's free to distribute and edit by anyone. In most cases, OSS is developed collaboratively by a variety of software developers and a community of contributors. The most popular and widely used OSS is the Linux operating system, but even enterprise organizations are increasingly adopting open-source software.

» **Personalization:** Personalization is a digital marketing strategy that focuses on tailoring content and digital experiences to individual users, audiences, or market segments. Many organizations leverage customer data to tailor their content, email, and social media campaigns to specific interests. The use of browsing history, real-time behavior analytics, and other advanced data processes has been termed hyper-personalization.

» **Platform as a Service:** Platform as a Service (PaaS) is a cloud computing model where the vendor provides infrastructure and tools for developing software using specific technologies. PaaS is a cost-effective way for developers to build and deploy applications.

» **Service Level Agreement:** A service level agreement (SLA) is a contract between a software vendor and its customer that outlines performance metrics like uptime and availability, penalties for not meeting the terms, and many other essential details SLAs are crucial for ensuring an amicable relationship between SaaS vendors and users.

» **Software as a Service:** Software as a Service (SaaS) is a software delivery model that provides customers with a cloud-based solution for a recurring monthly fee. The software vendor handles all the infrastructure requirements to deliver a scalable web-based application based on an SLA.

About the Authors

https://www.dotcms.com/

dotCMS is a content management system that helps global enterprises with sophisticated content requirements create, manage and deliver content anywhere. The dotCMS platform is best suited for organizations across industries who manage multiple brands, websites, workflows and content types across multiple languages, and need a solution that is secure and scalable for a development team to work with, but also puts power into the hands of the content & marketing teams who regularly need to make content changes. Brands such as Dairy Queen, Newell, Greensky, Chewy and Comcast have chosen dotCMS as their primary platform to scale their content operations and empower their marketing teams so they can reduce developer dependency, enabling teams to go-to-market faster, without sacrificing the flexibility and security of their CMS.

https://content-science.com/

Content Science is an end-to-end content company that partners with the world's leading brands and growing organizations to close the content gap in digital business. Content Science has earned international honors including Inc Best in Business. We bring together the complete capabilities you need to transform or scale your content approach for customer experience, employee experience, and more. Through robust analysis, smart strategy, expert consulting, creative production, and one-of-a-kind products like ContentWRX and Content Science Academy, we turn insight into impact. Content Science offers award-winning solutions such as CS Brain, CS Forge, and CS Lab to generate actionable insights into organizational content operations and improve content to promote a better user experience.