TO FIND THE RIGHT ANSWER ASK THE RIGHT QUESTIONS. Finding the right content management system (CMS) platform is an essential but daunting task for many organizations. The term “content management system” alone covers a myriad of possible capabilities, technology options, and implementation approaches. While no two organizations have the exact same content management needs, very few organizations can afford to be without an effective system for content management. There is, of course, no one right CMS for everyone. As SMITH’s content management specialists reveal, finding the right CMS for your organization starts with asking the right questions.

Here then is a look at some of the key considerations that go into choosing the best possible CMS platform for your organization.
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SMITH creates, designs, and implements a wide range of content management systems

In order to satisfy specific client needs, SMITH leverages any number of CMS platforms, including Drupal, Sitecore, Microsoft SharePoint, WordPress, Umbraco, and Joomla. Modern CMS platforms are built to accommodate multifaceted business strategies and needs. They go far beyond basic content management functions (like storage and organization) to encompass sophisticated authoring, collaboration, and administrative functionality. Modern CMS functionality makes content not only more accessible but also more actionable.

More functionality means more possibilities; it also means many variables to consider when selecting a CMS platform. To help you do that, this document details SMITH’s general approach to assessing and recommending CMS platforms, along with ways of customizing CMS platforms to accommodate particular business needs.

SMITH integrates with cutting-edge CMS platforms.
TECHNOLOGY PREFERENCES

Often, a client’s IT department will influence platform selection based on one or more of the following factors:

**Client’s familiarity with/preference for a specific technology**
An example, based on our experience in the field: Microsoft-centric IT departments are less likely to adopt open-source PHP-based solutions (and the reverse is true of PHP-centric IT departments).

**Staff availability in the area**
A given platform’s specialists/support personnel might be more expensive or harder to find in certain locations, making an otherwise preferred CMS platform less desirable.

**Client’s infrastructure**
If hosted onsite, the solution must adhere to the existing infrastructure capabilities. For example, a Microsoft Internet Information Services (IIS)-hosted platform would be an inappropriate selection for an Apache-based infrastructure.

**Existing licenses/discounts**
A client’s organization may already possess CMS software licenses or be eligible for significant discounts.

**Enterprise features support**
This includes high availability, scalability, backup and recovery automation, and performance profiling.
PUBLISHING PROCESS

There are some significant differences among CMS platforms when it comes to implementing the publishing process. Depending on an organization’s existing/planned business rules guiding content management, we would determine the following:

**Content management strategy**

There are two major publishing paradigms in content management: page-centric and content-centric. Some platforms support one or the other; others support both, either selectively or simultaneously.

**Number of stages in publishing process**

Simple CMS platforms use one-stage process with content being published immediately. Enterprise CMS platforms typically support a three-stage process with scheduled publishing.

**Content editing capabilities**

Depending on the business model and process complexity, support for in-page (WYSIWYG) content editing may be preferable to the specific content editor-based one. In-page content editing is a big CMS selling point for many business users. For example, many marketing specialists demand the functionality to edit advertisements right on the page, as the surrounding context is very important to the successful execution of an ad.

**Versioning requirements**

Depending on the determined business process, this could be anything from simple single-level data versioning to a “time machine” simulation that enables users to see what the site looked like or will look like at any specific point of time. Future-state previews are enabled by the highly in-demand “Scheduled Publishing” feature. This functionality enables content editors to create content in advance (for example, seasonal or holiday content) and specify the exact dates when it will (automatically) go live and when it will be taken offline. Time machine functionality enables users to get a preview of what their site will look like when the scheduled content goes live. This is particularly helpful for organizations that have multiple departments publishing content, because system users are able to quickly ensure that multi-source content is well aligned prior to publication.
Workflow capabilities
Certain organizations require sophisticated publishing processes driven by workflows. Such workflows can perform approval, integrity checks, cleanup, external source synchronizations, and other operations. Some platforms include visual workflow designers, while others provide rudimentary support only.

Roles and permissions
Different CMS platforms provide different levels of granularity when defining business roles and their corresponding permissions.

Document and asset management
Some CMS implementations have built-in document, video, and image management capabilities, while others rely on external systems.

Content deployment options
When it comes to multistage publishing processes, content can be deployed to production in manual, scheduled, automatic, full, incremental, or other ways. Some CMS platforms go even further, always deploying “latest version only” to the production database, while initiating content indexing and other content updating processes.
MARKETING CAPABILITIES

While part of traditional content management functionality, marketing capabilities have recently become highly in demand among CMS business users. The ability to not just publish content but also achieve measurable business goals is seen by many as an essential component of a successful CMS. Popular marketing capabilities include:

Marketing campaigns
Business users typically have tools for defining marketing campaigns, setting goals, assets, targeted audience, alerts, etc. The CMS recommendation in this case would depend on the complexity of a given organization’s marketing campaigns.

Marketing channels
In addition to traditional web-published content, some platforms can support email marketing, contests, initiatives, etc.

Targeting capabilities
This is the ability to easily target a marketing campaign to specific user groups, locations, and referrals, as well as the ability to target complex combinations of these groups.

Marketing analysis
Business requirements dictate the complexity of CMS platform capabilities for measuring the effectiveness of selected marketing strategies.

Marketing data reusability
Some CMS platforms enable marketing campaign results to drive various activities on the site. For example, a highly successful event promotion campaign targeted at specific customers could trigger the promotion of similar events directly to that group of customers.
INTEGRATION

Rarely would a modern CMS implementation be a standalone system that precluded communication with other systems. Depending on the types of external systems in question, different CMS platforms would reflect significant differences in integration capabilities and associated costs. We would examine the following:

User directories
It is common for an organization to have an existing user directory. Some CMS platforms natively connect to certain types of user directories without extra effort.

Single sign-on requirements
If an organization uses a certain type of central authentication for multiple systems, this can influence the CMS platform selection.

External content sources
This can be anything from a SQL table to a web service. Depending on the type of content sources, some WCMS platforms would require less implementation/configuration than others.

Platform connectivity
We will look into the set of APIs, protocols, and other data import/export means provided by each CMS platform candidate in conjunction with the current functional requirements.

Native platform integration
Certain types of CMS platforms natively integrate with other systems, such as CRM, ecommerce, collaboration, ERP, and others, allowing the use and management of content from such systems through the CMS’s tools and interfaces.
CONTENT DISCOVERABILITY

Generally, content discoverability encompasses three types of functionality: navigation, site search, and external search visibility. We would check the following:

Navigation capabilities

- The ability to manage different types of navigation.
- Guided navigation — In certain cases, it is essential to provide different navigation options based on the current content shown, previous navigation trail, frequent user actions, etc.
- Dynamic navigation — Automatically add approved items to navigation controls and update related links.

Site search

- Keyword control — In certain cases it is desirable to control what kinds of keywords can be used in search. (Some CMS search engines do not have this capability.)
- Synonyms — The capability to relate different keywords, phrases, and even search queries to improve the relevancy of search results.
- Ranking control — Another way to influence relevancy. For example, if a user searches for an “annual report,” the most recent annual report should rank first, even though other reports have more hits because they have been available longer.
- Search suggestions — A helpful feature designed to drive the user’s attention to specific content/locations, depending on the search query context or current content strategy. Different search engines provide different degrees of control over search suggestions.
- Indexing capabilities — While simple indexers generally crawl the web page content, more sophisticated ones can focus on specific sections, omitting unrelated dynamic content appearing in controls (such as navigation, tag clouds, marketing messages, etc.). Additional functionality may include indexing documents, content, and external sources.
- Result-types presentation — Some search engines give control over the content representation in results. For example, calendar event searches might contain result fields different from document searches.
Dynamic faceting — When searching for a specific type of content, the user can be presented with different refiners. For an event, it could be things like the location or start date; for documents, it could be things like document type or size.

Search analysis — Provides internal staff with search effectiveness reports. For example, to discover the most popular search query that does not return results, and then adjust search settings accordingly.

**External search visibility**

- SEO metadata control — CMS platforms require different amounts of implementation configuration to support management of SEO metadata.

- User-friendly URLs — There are certain limitations imposed on this feature, depending on the platform and publishing mode.
PERSONALIZATION

The success of most CMS implementations is dictated by the relevancy of the content served to each user. When it comes to personalization strategy we consider the following requirements:

Anonymous user profiling
This feature is available out of the box in a few content management systems. It identifies/classifies anonymous users through different means (geographical location, network location, entry points, behavior patterns, cookie-based information, etc.) and alters rendered content to be most relevant to this type of user. In addition, some of this information can be stored in a user profile, should the user decide to create one.

Personalization rules management
Some CMS platforms provide out-of-box personalization rules-builders that enable rule modification without coding/IT involvement.

User profile types management
Enables the creation and maintenance of various types of user profiles in order to target content, emails, notifications, etc.

CUSTOMIZATION

The ability to customize certain aspects of a site’s look and feel without IT involvement is essential for many CMS implementations. Depending on the specific business requirements, we consider the following:

- Ability to manage site chrome.
- Ability to manage templates for content presentation.
- Ability to add, remove, and/or rearrange pieces of content or functional elements within pages.
- Ability to change the way specific types of content are represented to a user.
SOCIAL NETWORKS INTEGRATION

CMS platforms support two types of social network integration: “push” and “pull.” We consider the following, should the business requirements dictate the need for this functionality:

**Push integration**
Enables user to “like” or reference a page/section/site, make a comment, or recommend content.

**Pull integration**
For an anonymous user, this functionality pulls site-related public activities from social networks. For a user currently logged into a social network, this functionality pulls the user’s friends’ activities related to the site, section, or page.

USER ACCOUNT MANAGEMENT

Some CMS implementations require user account self-management capabilities, including the ability for the user to register and maintain their own account. We would look for a platform with the most suitable self-management functionality, should the business requirements dictate the necessity for it.

WEB ANALYTICS

While in most cases an external provider like Google Analytics will suffice, some platforms provide internal analytics functionality that enables more granular and more secure real-time analytics data collection. In addition, such integrated analytics systems can supply data back to the CMS to inform content-serving behavior. For example, surfacing the most-searched-for event or most-watched video of the week on a site’s home page.
IMPLEMENTATION AND MAINTENANCE COSTS

While we focus on finding the CMS that offers the most functionality possible for the money, we also try to strike the right balance between functionality and cost. To that end, we factor in the following considerations:

■ Implementation, customization, and configuration effort.
■ Licensing and support costs.
■ Hardware costs (should an on-premises hosted system be selected).
■ Hosting costs (should a cloud-/provider-hosted system be selected).
■ Updates deployment complexity and costs.
■ System recovery costs.

Additional factors affecting CMS platform selection typically become apparent following a review of an organization’s business requirements for a CMS platform.
MEASURE TWICE, CUT ONCE.

Taking the time to carefully and thoughtfully select a CMS platform that best fits your organization’s needs is the first critical step toward maximizing the return on your technology investment. Of course, your organization may need to factor in any number of additional considerations not covered in the preceding pages. However, our hope is that this document will be helpful to you in your CMS selection process.

If you would like additional information or have any questions about how to choose a CMS platform wisely and well, please feel free to contact us directly. We’d be happy to assist.

FOR MORE INFORMATION

Contact insight@smith.co
ABOUT SMITH

SMITH is one of North America’s leading digital experience agencies. Creators of Transactional Brand Moments™ for humans living in an all-channel world, SMITH is proud to serve some of the world’s most highly recognized brands, including Microsoft, AT&T, Cisco, Motorola, Amtrak, Nestle, Sam’s Club, Xerox, and MasterCard. The company is headquartered in Seattle and has offices in Portland, Spokane, and Ottawa.

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