

WHITE PAPER

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# Choosing a CMS: The Ultimate Guide

A step-by-step guide to finding the right  
system for your organization's needs

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# Introduction

With the current pace of technological innovation, customers are demanding more out of their digital experiences. They now expect personalized and seamless experiences across all of their devices. That means delivering relevant content wherever they are, and whenever they want it. Your competitors know this, and they're stepping up their digital game, making it harder to stand out than ever before.

Companies need a CMS that allows them to turn great ideas into reality quickly, and meet rapidly changing market demands. A future-proof CMS that's prepared for those evolving demands will help unshackle your developers and empower your marketers without sending your CFO into meltdown.

The market for CMS solutions, however, is vast and complicated. There's no perfect solution, so the key is finding a CMS that's going to fit your unique needs and specific business goals.

This guide is here to help you do that by breaking down the selection process from beginning to end.

You'll learn about:

- *The different types of CMS solutions on the market*
- *Whether a best-of-breed or suite approach is best for your needs*
- *How to find a solution that satisfies both business and technical users*
- *Properly evaluating solutions through RFPs and proofs of concept*
- *Resolving common questions that arise during the implementation process.*

# Part 1: Breaking Down Your CMS Options

When you think about it, every content management system is simply a piece of software designed to help organizations create, manage, publish and update content for their customers.

However, not every content management system takes the same means to this end. There are a multitude of ways systems are differentiated - from how they are hosted to how they deliver content to the end user.

**A big part of the initial stages of the selection process is navigating these different types of systems to figure out the best type of CMS for your needs. This will significantly narrow down the number of systems worth evaluating.**

In this section, we'll break down the primary ways CMS solutions are differentiated and when each type of solution may be best.

## CMS vs. DXP

The first notable distinction we'll look at is the difference between a content management system (CMS) and a digital experience platform (DXP). While both types of solutions set out to achieve similar goals for organizations and have numerous overlapping features, there are a few critical distinctions to understand.

These two types of systems will be broken down further in the next section, so consider this a primer.

## What is a Content Management System?

A CMS enables organizations to more efficiently create, manage and publish content to websites, mobile apps and other digital channels.

In today's digital world, marketers are continuously producing digital content featuring text, images, and videos that attract audiences and generate leads. A CMS makes this process infinitely easier by allowing them to create and publish this content without needing to edit HTML and CSS.

Like with any software, content management systems can vary widely in their feature set but there are some capabilities that can be considered standard.



At a minimum, a CMS provides user permissions, version control, WYSIWYG editing, content modeling and workflow features to streamline the publishing process. More advanced systems will provide functionality in areas such as personalization, translation, SEO and multi-site management.

## What is a Digital Experience Platform?

While what a CMS is and does has become clearer over the years, the term digital experience platform is still a bit nebulous. At its core, a DXP is a set of technologies that are tied together to help organizations power their customers' digital experiences. The key is that all of the technologies are interoperable and working together toward that ideal experience.

Content management is a key part of what a DXP does, but they are meant to support other parts of the customer experience strategy as well, such as analytics, optimization, search, eCommerce and more. The idea is that no matter how and where customers are interacting with your brand, they will be served a compelling and seamless experience.

Your DXP doesn't necessarily need to be provided by one vendor. For example, you could select a CMS with APIs that allow it to integrate with other platforms like eCommerce. This allows you to then work with the best technologies rather than settling for those offered by one DXP vendor.

## Open Source vs. Proprietary

The second distinction we'll look at is whether to go for an open source or proprietary CMS.

**Both can be viable options depending on your needs. In fact, many vendors offer both types, with an open source community editions and additional paid services under a proprietary enterprise license.**

### Open Source

As the name implies, open source software makes its source code publicly available to use and modify. Generally, open source CMSs are free to use.

With access to the source code, customization is a key benefit of open source CMS solutions. Most open source CMSs take advantage of leading open source technologies themselves, giving developers more familiarity right off the bat. Some of the more popular open source systems, like WordPress, have robust communities looking to move the technology forward and help fix bugs.

Open source content management systems do have their drawbacks. They tend to be more developer-focused and less friendly for marketers. They also tend to have less enterprise-level functionality such as personalization and testing built in. While the software is free, having to customize the platform enough to deliver enterprise-grade features can be so costly as to eliminate that advantage in the first place. Lastly, many lack professional level support.

Weighing the benefits and drawbacks, open source content management systems are ideal for smaller projects and more basic websites.

## Proprietary

Proprietary, sometimes called commercial, content management systems require a licensing fee to gain access to the software.

These solutions often come with more advanced features than their open source counterparts, particularly with marketing-forward capabilities such as SEO and omnichannel delivery. They are usually more robust, making it possible to manage complex multi-site, multi-language environments. There is also more focus on the end-user, meaning smoother interfaces and more intuitive functionality. Access to professional-level support is another advantage.

As mentioned, proprietary means your organization is paying a licensing fee. It can be quite an investment, so it's important to look for a solution that provides strong ROI. While there are exceptions, many do not provide access to the source code even upon purchasing a license, which can hinder customization.

A proprietary CMS may not be worthwhile for very basic sites. However, organizations looking to create complex digital experiences for their customers are best served looking at proprietary systems.

## On-premise vs. SaaS vs. PaaS

There are a variety of different software deployment models available like software as a service (SaaS), platform as a service (PaaS) or on-premise. While many vendors only provide one option, some have solutions that can be hosted in different ways.

### SaaS

A SaaS CMS is hosted in the cloud rather than your own physical servers. This method eliminates deployment or maintenance requirements. You don't have to worry about investing in costly servers and other hardware because the vendor

provides hosting for you. You simply pay for a subscription to the software and its available online from anywhere.

The downside of SaaS solutions is that they rely on a multi-tenant infrastructure. This means you are sharing that cloud infrastructure with a vendor's other cloud clients. Because of this, you aren't able to customize the platform to adjust to your specific needs. The best you can do is push the vendor to develop an upgrade and hope it is high priority enough for them to implement quickly.

While a SaaS solution significantly reduces IT costs, you're also giving up some control of your system. That's why with a SaaS solution, you need to be sure the vendor is reliable and has strong customer support.

## PaaS

A PaaS CMS solution provides the same advantages as SaaS but gives you an additional layer of control by providing a single-tenant infrastructure. This gives your organization its own environment to customize and tailor your CMS as needed.

PaaS typically includes preconfigured tooling, environments and hosting, so developers and IT teams can quickly deploy integrated software solutions. Developers, therefore, are left to focus on business logic rather than updates, patches and other maintenance tasks, leading to a faster time to market.

PaaS is ideal for companies that want to save time on hosting and a developer environment set up but want control over the deployment and customization of the software itself.

## On-premise

With an on-premise solution, you're responsible for all the infrastructure and hardware required to deploy the CMS software.

Hardware is a substantial upfront cost and may only be practical at-scale for large enterprises. In some cases, on-premise can be used with a public or private cloud to form a hybrid cloud solution.

Either way, on-premise is often the most secure deployment method because data can be stored behind a company firewall and data exposure can be limited. For companies that already have the hardware, on-premise or hybrid cloud options may be the most efficient.

# Traditional vs. Headless vs. Hybrid Systems

The architecture of the CMS is another critical factor to consider. While traditional CMS platforms were at one time a standard, headless and hybrid headless architectures are growing in popularity as organizations look for more efficient ways to deliver content.

## Traditional

Traditional CMS solutions have been around for a long time. They were designed to help marketers publish content to websites without needing to edit any code.

With this type of CMS, the content editor is tightly coupled with the presentation layer. This helps marketers see exactly how their website will look as they are creating and editing content. This works well when a company is only publishing content to its websites, but it becomes challenging as organizations turn to an increasing number of digital channels.

The tightly coupled nature of the system does not allow them to scale as easily as the solutions below. Companies that don't market across various digital channels and that employ a mainly static website are going to be the best fit for a purely traditional solution.

## Headless

A headless CMS separates the authoring of content from its presentation layer. The CMS delivers the raw content via APIs to any number of channels, such as desktops, smart watches, digital kiosks and so on. By separating content from presentation, marketers can reuse a single piece of content on any channel, even those that don't exist yet. Developers are able to create apps and other digital experiences without being tied to any particular framework.

On the downside, marketers lose their in-context editing tools and previewing capabilities. They have no way of knowing how their content will look when published and end up relying on IT to make changes to the presentation layer. Pure headless solutions give developers more power but also end up taking away from the marketer.



# Hybrid

A hybrid CMS solution is meant to provide the best of both worlds. It contains full CMS functionality like preview and in-context editing, but the content can be delivered in pure form through APIs.

This type of solution still supports omnichannel delivery and lets developers choose the front-end frameworks of their choice. The additional advantage, however, is marketers can create and publish content without relying on developers due to integrated content authoring tools like a WYSIWYG editor.

Hybrid headless content management systems are best for companies that want that “create once, publish everywhere” ability but also want to let marketers create rich, personalized experiences more efficiently.

# Part 2: All-in-One DXP or Best-of-Breed CMS?

One of the most critical decisions you'll have to make during the CMS selection process is whether an integrated suite or a flexible best-of-breed solution is the best fit for your needs.

An all-in-one DXP, sometimes known as best-in-suite, approach means using products and modules from one vendor to form a digital experience platform that meets the majority of your business needs. The suite will include CMS functionality plus other products covering areas like eCommerce, marketing automation, digital asset management, CRM and marketing analytics. The products are meant to easily integrate with each other and are marketed as providing many of the capabilities required by enterprise companies out of the box.

On the other hand, a best-of-breed approach means selecting your CMS and the other technologies that power your digital experience separately without needing to stick to one vendor. Through APIs, these technologies will all work together as one unified DXP. The idea is to let organizations create a digital experience platform that perfectly suits their needs.

With this in mind, let's take a closer look at the pros and cons of each type of solution so you can determine which is the best route for your business.

## DXP Suite Advantages

### User Interface Consistency

Generally speaking, an all-in-one DXP will have a consistent user interface across the components of the platform. The unified interface means adoption and training for users are simplified because there's a consistent experience to learn and utilize. Even for the components used least often, users should be able to reintroduce themselves quickly. Of course, this all depends on choosing a platform with a user-friendly, intuitive interface to begin with.

### Streamlined Vendor Relationship Management

If you choose a single best-of-suite solution, you'll only have to deal with one vendor, which reduces communication and accountability to a single company. Of course, this is only an advantage if the vendor is reputable. Most of the time, suite solutions are provided by large software companies, so there's a reduced business risk in the vendor discontinuing its service or requiring multiple migrations near-term. One vendor relationship can be advantageous as long as you're not subject to vendor lock-in.

### Ease of Integration

A suite solution has a set of systems all provided by the same vendor, so they're meant to be easily integrated. Having a multitude of vendor-provided tools eliminates much of the work for bringing in additional functionality beyond a CMS - as long as the tools fit your business needs. If not, you'll still need to integrate third-party systems like a best-of-breed approach would require.

## DXP Suite Disadvantages

### Vendor Lock-in

Digital innovation is happening rapidly, and companies need to remain agile to stay competitive. Implementing a suite solution makes you reliant on a single vendor for updates and new features, and in order to migrate to the suite you may need to abandon existing products that are already meeting your needs. Along with the limited ability to swap out components, forming a reliance on a solution with high overhead could make migrations substantially more difficult later on.

### Product Quality

When a vendor creates a range of products, odds are that not every one of those solutions is going to be the best option on the market. It becomes difficult, if not impossible, for a suite vendor's solutions to outperform those of vendors who focus all of their time and attention on a single product. Sometimes companies acquire the solutions of others to add to their suite, even if it isn't necessarily a leading product. For this reason, going with the suite approach may result in sacrificing quality of tools for convenience's sake.

### Cost vs. Utilization

A significant drawback of the all-in-one suite is that your licensing costs are inflated by the tools included within the suite, whether you actually use them or not. For instance, you may end up paying for marketing automation functionality, even though you already have a preferred solution you continue to use. This is feature bloat. You are paying for extraneous functionality without actually needing to. Contrast this to best-of-breed, where you'd simply add and pay for the functionality as your needs change.

## Best-of-Breed Advantages

### Stronger Technologies

Vendors that focus on one particular function are likely to be better at it than vendors attempting to cover the full range of digital experience solutions. The best of breed approach means you get the best content management system for your content management needs. You can then connect it to the best marketing automation platform for your marketing automation needs, the best analytics platform for your analytics needs and so on. You'll ideally end up with a digital experience platform made up of stronger individual components than an all-in-one suite. Of course, this requires a CMS with robust APIs to create seamless integrations.

### Adaptability & Scalability

Tightly-coupled integrated suites are more cumbersome to maintain and upgrade. Best-of-breed ensures your pace of innovation is not strictly tied to that of a single vendor. With separate products and services that serve a specific purpose, it's much easier to replace individual components and adapt to a fast-changing digital landscape. The best-of-breed approach ensures your business can respond to market changes rapidly and scale your tech stack as needed. This isn't just helpful down the line. Best-of-breed lets your team continue working with applications they are already familiar with. This can save substantial migration costs by leveraging some of your existing services that integrate with the new CMS.

### Not Too Much, Not Too Little

A best-of-breed CMS lets organizations choose technologies that solve the specific problems they are facing. These solutions usually have open architectures that make further extensions and customizations more straightforward. This mitigates one of the primary risks from the all-in-one suite approach, which is paying for technologies the organization isn't even using. Using the modularized approach, you'll be able to create a highly tailored DXP platform by using a variety of services for specific use-cases, with smaller scopes, shorter implementation times and lower costs.

## Best-of-Breed Disadvantages

### Multiple Licenses

With best-of-breed, you'll use a CMS from one vendor and your other digital experience solutions from a variety of others. Each will require an individual license, at least the ones that are not open source. This doesn't necessarily mean it will cost more, but managing multiple agreements could become time-consuming or complicated. That said, the benefits of using the best available technology may outweigh any disadvantages on the vendor management side.

### Potential Integration Conflicts

Any time you have a modularized architecture, there's the potential for integration conflicts. In a best-of-breed situation, you have a content management system that needs to work together with CRMs, DAMs, etc. from various vendors. The biggest challenge with this is sharing data. Applications store data uniquely, so you need to have APIs that can communicate between systems to avoid data silos. That's why it's essential for a best-of-breed approach that you choose a vendor with a CMS that prioritizes third-party system integrations.

### Flipping Between Applications

Going with a best-of-breed approach generally results in having to flip back and forth between various applications. You may have to first go to your analytics platform to see how a page is performing, log into your SEO platform for suggestions, then flip over to your CMS to make improvements. This all adds up. However, this can be mitigated by a CMS that serves as a content hub, bringing data from various applications directly into the CMS interface.

# Part 3: Finding the Right Fit for Both Marketers & Developers

A new content management system will have business impacts across your organization, but there are two departments that will be impacted the most. These are your marketing and IT departments.

Simply put, individuals in these functions will be most intimately involved with your new system. Their quality of work and how efficiently they get that work done are heavily dependent on the fit of your CMS to what they are trying to achieve.

In this section, we'll highlight features and characteristics of a CMS that will benefit both your marketers and developers. Of course, every organization has different needs and it's always important to focus heavily on those. But these are areas that, generally speaking, will be critical to organizations across a range of industries and business models.

## What Marketers Need

Marketers are usually the heaviest users of a CMS. It's up to them to think up, create and push out content that creates compelling digital customer experiences. It's critical that your CMS allows them to do this more effectively, as 89% of companies believe that the customer experience will be their primary basis for competition according to Gartner.

In essence, the CMS is a platform for marketers, so it's crucial the software includes the features and capabilities that empower them to bring their great ideas to life.

## Intuitive Interface

One of the most important functions of a CMS is to empower non-technical users to create digital content. You want the interface to be easy for even the least tech-savvy staff to use, so a WYSIWYG editor is essential. Marketers should be able to edit content in-context with simple drag-and-drop functionality that eliminates the need for writing code or HTML markup. The editor should allow non-technical users to effortlessly create landing pages, microsites, and more from the content down to the layout and design.

When authors and editors can create and publish independently, it eliminates the added costs and time delays of bringing in IT too often.

## Rich Personalization

It's no secret that personalization drives results. In fact, 70% of businesses that have adopted a content personalization strategy report their content being more effective.

That's why marketers want a CMS that helps them deliver dynamic content that's relevant to users. Your CMS should allow both implicit and explicit personalization. Explicit personalization is based on information people give you, such as their income-level or topic preferences. Implicit personalization is based on their behaviors like whether they are a new or returning visitor.

Creating segmented audiences and tagging content for each specific audience should be simplified. Personalization is essential but shouldn't require mammoth effort to execute.

## Localization

For many global enterprises, showcasing their digital presence in multiple languages is a must. Your new CMS should have support for translating directly in the CMS, exporting and reimporting in the desired language, or both.

For truly localized experiences, marketers need capabilities beyond simple translations that can factor in regional differences like dialects and other cultural distinctions. These smaller details can make a considerable impact when it comes to engaging audiences around the world. Localization makes content more relevant to readers and encourages brand loyalty.

## Multisite & Multitenancy

Centralized content management drives efficiency. Large enterprises not only need localized websites for different regions, but they may have dozens of different brands, each with their own separate site. A multi-tenant CMS lets you manage all of your brands and websites in one place.

You can realize big savings with a CMS that allows marketers to create content pools. They can then reuse content across various sites when relevant. It's more efficient, plus it creates a more consistent digital experience for site visitors.



## Workflows

At most organizations, content authors don't just create a piece of content and push it live. The author will create it. Then it'll go around to various editors. It may even need to be reviewed by legal to ensure compliance before finally being published. It'll likely be updated numerous times in the future.

Your CMS should have flexible workflow features that can be customized to fit your company's needs even as they change. Content should be easy to find via search even if there are thousands of pieces to sort through. It's also crucial for compliance to have backups of content and the ability to revert to previous versions of content.

## Analytics & Testing

Modern marketers are all about working smarter. This makes analytics and testing capabilities crucial for optimizing marketing efforts and making strategic decisions.

Rather than toggling back and forth between your content and analytics, it should all be available within the CMS's user-interface. You want to have essential metrics tracked like page views and site conversions, plus more detailed key performance indicators that drive decision-making. This increases efficiency while also keeping performance top of mind.

On the testing front, marketers should be able to quickly set up variants of their content which the CMS then distributes to the intended audiences. It's the best way to ensure your marketing team is creating content that resonates.

## What Developers Need

While marketers will focus on features that improve the customer experience and efficiency, developers want software that's easy to work with, flexible and secure. They're in charge of implementing, maintaining and integrating the software with third-parties, so the developer experience is just as important as the marketer experience.

Think of developers as stewards of your CMS. They want to keep everything running smoothly and effectively, but they also want to be able to empower marketers enough to use the tool without running to them for help with every task.

## Open Architecture

Odds are that what you need from your CMS will change over time as your organization evolves. That doesn't mean you should change systems every few years. A CMS with an open, modular architecture is essential for ensuring scalability.

Open architecture makes it possible to add, upgrade and swap components of the CMS. This allows developers to provide just the right level of functionality and to scale as needed. With a traditional monolithic architecture, deployments become far more cumbersome and challenging. By allowing your developers to "see inside" the software, an open CMS becomes far easier to work with.

## Robust APIs

APIs drive much of the communication between modern applications. It's essential to choose a CMS that has robust APIs out of the box and the ability for developers to easily create new endpoints as needed.

The omnichannel experiences many organizations are shooting for are very much driven by APIs. They can be used to serve content to a variety of frontend presentation layers, such as mobile devices, digital displays and even smart speakers. They also need to interact with third-party systems seamlessly. Interoperability is crucial for a smooth CMS implementation and developing an effective digital experience platform.

## Flexible Integrations

While marketers may be the ones demanding integrations with customer relationship management systems, marketing automation tools and others, it's the developers who make the integrations happen.

It's crucial that the CMS, especially if it has a best-of-breed approach, has out of the box integrations with popular third-party tools. It's also essential that there's straightforward tooling for developers to connect additional systems that aren't supported by default so that the new CMS fits in seamlessly with the company's current processes.

## Security

Data security is of the utmost importance. Any lapses become a PR nightmare and a huge hassle to rectify.

The CMS should have built-in authentication and authorization features that are highly customizable to fit your organization. Administrators should be able to create user roles and set permissions down to a granular level. In addition, the latest security features like multi-factor authentication should be supported to ensure businesses keep data secure.

Furthermore, the available APIs should use industry standard security features like API keys, tokens and throttling. It's important to choose a software vendor that provides patches for security vulnerabilities frequently and promptly. You can't afford to put customer data at risk.

## Documentation & Support

Even with easy-to-use APIs and integration modules, you still want to make sure the platform has quality documentation. A CMS with an excellent developer experience drives innovation and reduces time to market.

Documentation and responsive support are a crucial aspect of this. You want a CMS vendor that keeps documentation up to date and has reliable support options to reduce the burden on developers and system administrators to implement and maintain the software going forward.

# Part 4: Evaluating Your Options: The RFP, Technical Demo & Proof-of-Concept

After determining the type of CMS to look for and your desired capabilities, the CMS selection process will consist of stages -- the request for proposal (RFP), technical demo and proof-of-concept (POC). Each of these is designed to help you narrow your choices before advancing to the next stage.

The request for proposal gets rich detail on vendors' ability to handle your needs all documented in one place. Technical demos deliver answers to more specific questions as you see the capabilities play out in front of you. Finally, the proof-of-concept is the test-drive that confirms a CMS will meet your real-world needs.

It's essential that you optimize each of these phases to ensure you make the right CMS selection.

## Request for Proposal

Despite its prevalence in the selection process, many organizations don't have their RFP process fully optimized. They send out templated RFPs with a seemingly infinite number of checkboxes that vendors can easily just tick off.

The RFP can be an amazing tool that prevents you from wasting time and resources by advancing too far with the wrong CMS vendor. It's a chance to get answers to your critical stakeholders' key questions, uncover details on how prospective vendors deliver on what they promise and check the overall viability of the vendors under consideration.

Getting the RFP right is a huge step in the right direction of finding your ideal CMS.

# RFP Essentials

Here are four tips for creating your own RFP and kickstarting your relationship with potential vendors:

## 1. Keep the list of vendors short

When sending out your RFP, you have to keep in mind that you'll need to carefully review each the responses, so it's best to keep your list of vendors short. You should do preliminary research on each vendor by looking at case studies, client testimonials and public documentation. Don't discount smaller vendors, as they may have niche software that is suitable for your organization. Keep the list to under ten highly compatible vendors to ensure later stages in the selection process are manageable.

## 2. Avoid the checklist

It's easy to just send a generic template to vendors and ask them to check off the features they support, but this won't lead to a successful CMS selection. Instead, the RFP should provide vendors with a clear idea of your core business requirements, so they can better explain their value for your organization in specific detail. Your stakeholders should create an extensive list of capabilities they're looking for and request that vendors describe in detail their support for each. The checklist approach will most likely result in vendors ticking off boxes even if they do the bare minimum in certain areas.

## 3. Gain insight into vendor viability

Perhaps most critical, your RFP should help you evaluate if the vendor is reliable, has many client success stories and has a promising company outlook and development roadmap. You don't want to form a long-term relationship with a software vendor that won't support your organization into the future and continuously develop the product to meet rapidly changing technological innovations.

## 4. Review the responses thoroughly

After sending your RFPs, you'll want to evaluate the responses thoroughly. It's critical that you are strict with your criteria during this stage to avoid wasting resources when you get to the POC phase. Don't hesitate to ask for follow up from vendors on any answers that aren't clear or lack the necessary detail.

**After using the RFP responses to narrow your list to three to five vendors that are a potential fit, it's time to schedule technical demos and further discussions with each of them.**

# Technical Demo

The technical demo is your opportunity to see the CMS in action and get specific questions answered by product experts. Ask for details of the demo ahead of time, so you can determine the additional capabilities you'd like to see demonstrated that the vendor wasn't originally planning to cover.

All of your key stakeholders should be included, particularly those from IT and marketing, so you can get buy-in from each area that will be impacted by the CMS and have a thorough evaluation of the product offering.

During the demo you should ask for details that will have an impact on your specific implementation needs and for the presenter to show the features most important to your organization, so the demo remains relevant to your business requirements. Don't let the presenter dictate the demo or you'll miss out on a crucial consideration of the decision-making process.

The demo at this point should be highly customized for your business. Vendors that are serious about gaining your business will even showcase a part of your site on the platform, so you get a better idea of fit.

Depending on your needs, there may be a need for more than one demo from each vendor under consideration

After the demo(s), if the vendor and product still seem like a good fit, you should request and schedule a proof-of-concept.

# Proof-of-Concept

If you've followed our guidelines during the RFP phase, your organization and the vendors on your shortlist should have a clear idea of the unique business requirements for the CMS migration.

Now it's time to really test which solutions will meet these requirements during the proof-of-concept phase. The POC should take 2-3 weeks to implement and will feature a section of your site built on the vendors' CMS platform.

If substantial issues arise, you can move to the next vendor on your shortlist without having wasted time and resources on a full-on implementation. It's better to start small and discover critical problems or incompatibilities with a particular vendor early on. With this in mind, we'll look at some of the keys to a successful POC phase.



## Focus on Core Requirements

You want to have specific goals and use-cases at the start that the POC will attempt to validate. The appropriate stakeholders should come up with real-world scenarios to ensure the product is the right fit from marketing to IT and that no essential functions are missing. In just a few weeks, you won't be able to evaluate all the functionality you'll eventually use, so it's important that you focus on the most critical capabilities for your particular business requirements.

## Think Outside of Content Migration

While moving your content to a new CMS is critical, don't focus solely on this during the POC. You need to consider design templates, third-party integrations, content taxonomies and many other capabilities that could become a challenge during the migration. Integrations, in particular, can be complex and are crucial for most enterprise companies, so you should include evaluating the most critical third-party system connections in your POCs.

## Identify Potential Development Needs

Throughout the POC process, you'll likely encounter functionality you need outside of the platform's core functionality. This could be anything from integrations to complex configurations unique to your business. It's essential that you determine early on what development work is required, in what tech stack and whether you have the IT capacity to complete the development requirements.

## Let Stakeholders Test the POC

It's not enough to have IT work with the vendor in creating the POC. You want to set up a shared environment that lets stakeholders from every department test the CMS to get an idea of how it will be to work with. One of the most important selection factors is that users can easily grasp how to use the platform. Most of the time, these environments are set up in a cloud solution like AWS or Azure to ensure the POC is easily accessible.

## Making the Choice

At this point, you should have enough insight to choose your new content management system. Hopefully, you've had a successful POC and are ready to move on to a more comprehensive prototype or even a full implementation. By asking the right questions and bringing in the most relevant team members during every stage of the journey, you maximize your chances at selecting the best CMS product for your organization.

# Part 5: CMS Implementation FAQs

While choosing a CMS with great general functionality is important, the implementation is the time to tailor the software to fit your business requirements. If you don't put in the effort to properly configure and extend the software, even a great CMS will not be an effective solution.

In this section, we'll cover some of the most common questions we get when it comes to a CMS implementation. If you have additional CMS implementation questions, feel free to reach out to Magnolia for more information.

The specific questions include:

- How long does a CMS implementation take?
- What goes into the implementation planning?
- What should I expect during content migration?
- Which stakeholders should be involved?
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- Which stakeholders should be involved?
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## Implementation FAQ

### How long does a CMS implementation take?

While most modern software can be deployed in a matter of weeks or days, many supporting tasks can extend a CMS implementation to anywhere from several months up to a year. Tasks like setting up infrastructure, migrating content, designing templates and integrating third-party systems can take substantial time with some CMS products.

### What goes into the implementation planning?

Once a CMS is selected, substantial effort should go into planning the implementation before getting started. You want to ensure you have sufficient personnel and budgeting from all stakeholders, decide on whether to use an implementation partner, and determine the scope of the initial project. It's often

best to have a small-scale pilot of the software before fully migrating, especially for large enterprise companies.

## What should I expect during content migration?

Content migrations are most successful with proper resource and budget planning. Migrations are time-consuming, so it's best to start them early in the implementation process. Start by taking an inventory of existing content and reducing what's outdated or no longer relevant.

From there, decide whether you can use automated scripts to move the content, or if you'll need to manually modify content to make it fit with the content models in your new CMS platform (hint: this is something to think about during the selection process).

## What are common issues encountered during an implementation?

One of the most common challenges during a CMS implementation is migrating data. While content can sometimes be easily migrated to a new CMS using automation, many companies find out later that older, more unstructured content can't be reformatted easily using scripts and that more human effort is required.

You'll want to make sure you evaluate your content beforehand and that the CMS you choose has flexible content types and taxonomies to fit with your existing content.

Another common challenge is third-party integrations. Unless a platform happens to have modules to integrate with all your other business tools and services out of the box, you'll likely need to develop them in-house or outsource - both of which can be expensive. That's why integrations are crucial to consider during the selection phase.

## Which stakeholders should be involved?

It's crucial to involve both business users and IT staff during the implementation process. You want all stakeholders to take ownership of the project and feel accountable for the success of the implementation. Content marketers and authors need to give their input when configuring the software to meet their needs and ensure the content models are ideal for their marketing efforts. IT and development teams need to be involved with the deployment and integration with third-parties, even if you use an implementation partner.

## Do I need to go with a partner?

Partners can make a massive difference in the success of a CMS implementation. Implementing a CMS is complicated, and many organizations don't have the expertise within their internal IT teams.

Partners certified by your CMS vendor of choice bring in detailed product knowledge and have previous implementation experience that can help you avoid many of the common roadblocks clients encounter along the way. Not only do they provide support for getting the CMS up and running, they also usually offer additional training for your IT and marketing teams.

Depending on how unique your business requirements are and the quality of your IT team, you could consider implementing the CMS alone. But for most companies, choosing an experienced CMS partner is essential to a successful CMS implementation.

## How do I choose an implementation partner?

Most vendors will have a directory of certified partners on their website, which is a good starting point to find potential partners that know how to implement the CMS well. You'll want to ask partners further questions on their previous implementations for clients in your industry, so you're confident they're able to deliver the results they promise.

Beyond confidence in the partner's technical abilities, you want to ensure their processes and responsiveness are both aligned with your expectations to ensure a beneficial business relationship going forward. Ultimately, you'll need to speak to multiple partners to get a feel for which one has the right expertise and vision for your specific implementation project. If you can speak with clients of these potential partners, that will provide an even clearer picture.

## How do I know if an implementation partner is a good fit for my company?

When choosing an implementation partner, it's crucial to make sure they're the right fit for your organization. This will vary based on your business goals, as some partners will have the technical expertise to deliver a fast time to market at low-cost, while other partners may have the cross-functional experience to form a more comprehensive solution and drive change within your organization. Other factors, such as whether a partner is local or not, will also play into a potential partner's fit with your organization.

## How do I know my implementation will hold up over time?

By this point, you've probably realized that implementing a new CMS is costly and time-consuming. You don't want to go through the process again for a long time, so your implementation meets both your current and future needs.

Much of this is dependent on the CMS you choose. Do its APIs allow for content delivery to any channel and for integration with any platform? But it's also dependent on the implementation process. Including your future needs as part of how you implement the system will go a long way toward minimizing the needs for mass reconfiguration down the line.

# Summary

Finding the right CMS can enable growth through seamless customer experiences, personalization, commerce and collaboration. It's the only way to stay competitive in a rapidly evolving digital landscape.

The wrong CMS, on the other hand, will leave your team fighting a constant uphill battle to deliver the experiences customers demand.

Making the choice isn't easy, nor should it feel so. CMS selection at enterprise organizations requires a heavy investment in time, resources and budget.

Hopefully, our guide provided you and your stakeholders the reminders and resources to feel confident about your choice. In a nutshell, the key to remember is that it is all about your specific business. A systems popularity or industry recognition should never outweigh the specific use cases you need the system to meet.

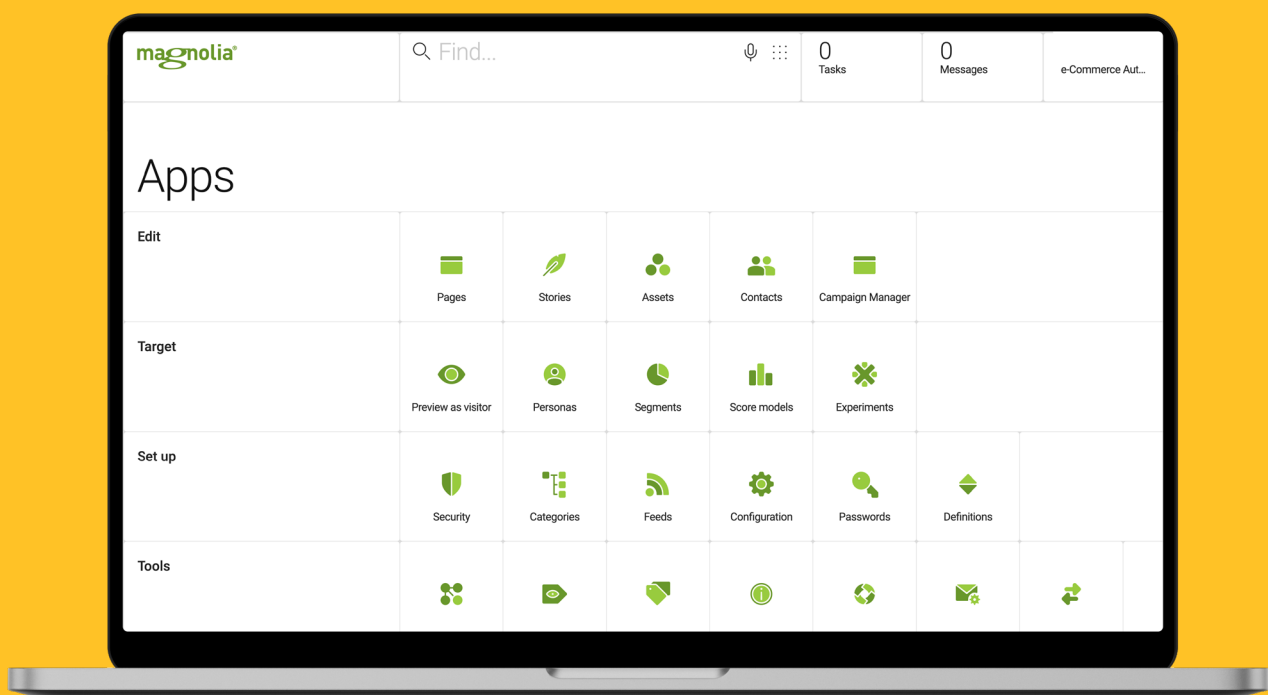
Now that you've read *Choosing a CMS: The Ultimate Guide*, you can start on your search and feel confident you'll find the system that's going to elevate your organization.

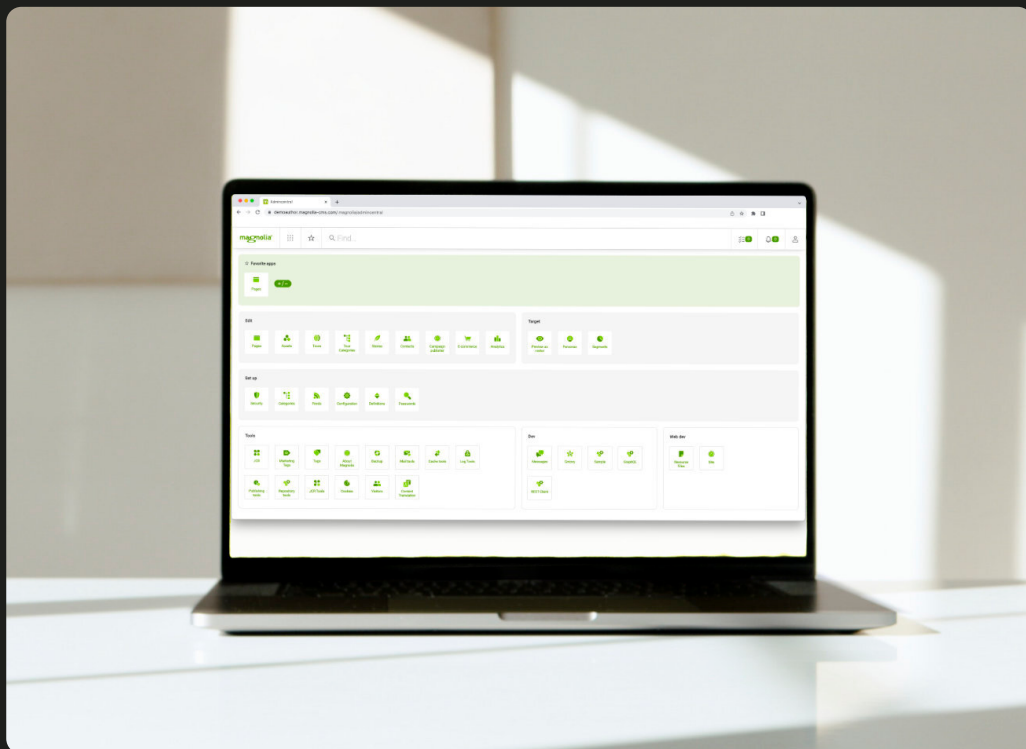


# About Magnolia

Magnolia is a leading digital experience software company. We help brands outsmart their competition through better customer experiences and faster DX projects. Get full headless flexibility and seamless workflows across best-of-breed digital experience stacks. Global leaders such as Tesco, Avis, Generali and the New York Times all rely on Magnolia for maximum reliability, high-speed project implementation and exceptional omnichannel experiences.

To learn more about how Magnolia will help you improve your digital presence visit [magnolia-cms.com](https://magnolia-cms.com).






## Get in touch


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