

# A Guide to Web Content Management System Evaluation

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## Introduction

Purchasing a web content management system (CMS) can be a lengthy process and a very expensive one if proper steps are not taken to ensure the best fit for your institution. This white paper offers a general understanding of web content management, a suggested needs assessment for evaluating a CMS for a higher education institution, and typical areas of overspending that can occur.

## Understanding Web Content Management

A web CMS simplifies the process by which content contributors create, publish, and update website content. Put simply, a web CMS:

1. Enables authors and editors outside the web team to contribute
2. Puts the responsibility for content accuracy in the hands of those responsible for that content
3. Decreases the time and costs associated with web content maintenance

What's important to note is that web CMS usability is the key – or the killer. User acceptance and adoption is driven primarily by ease of use. The return on investment of any web CMS is zero if no one accepts or uses it.

## The Importance of Web Content

For higher education institutions, the website is often the first influence on prospective students, their parents, alumni, and donors. The information it contains is critical to those who visit it every day. And because of that, it has become a major communication tool.

Your institution's website is central for providing support for student information, public relations, recruitment, and a growing number of mission critical services. Delays in posting new material can result in erroneous information, visitor frustration, and lost confidence in your institution's vital stakeholders. Website visitors need accurate, up-to-date information in order for the site to be a valuable resource. If it is unreliable, both the site and the institution lose credibility.

To add to the mix, managing content is more than just overseeing content on the website. With the explosion of social media, contributors also must think about publishing to channels such as Facebook and Twitter.

Compounding matters even further, many services that were once handled by print technologies (e.g., course catalogs) are migrating to the web. The need for new online services is greatly outpacing the available resources tasked with maintaining them.

## ***The Benefits of a Web CMS***

### **Increased Efficiency**

A good web CMS will lower the cost of maintaining an effective web presence by reducing the time needed to implement new and updated content. This is typically achieved through elimination of process bottlenecks. With a CMS, content updates can be done by the many content contributors throughout your institution, reducing the need to hire additional IT staff, allowing for better use of technical resources, and enabling more timely content updates to occur.

### **Increased Value**

Quicker content updates enable you to improve communication to stakeholders. If implemented correctly, a web CMS can prevent outdated website information and ensure content consistency across pages and sites, improving your overall image and message effectiveness. As a result, you will experience increased visitor satisfaction and visitation. A good CMS should also allow you to easily take advantage of the latest web technologies, such as HTML5 and social and multimedia integration, so that you can create a state-of-the-art website that attracts your target audience.

## ***How Other Institutions Are Managing Web Content***

### **Status Quo**

Website maintenance using the traditional webmaster approach is still used today. This approach gives an individual webmaster exclusive control over website updates. However, due in part to the size and complexity of the institutional website, most colleges and universities have realized the dramatic inefficiencies that this approach affords and the lack of ability to compete with other higher education institutions. Plus, the reliance on a single webmaster can be disastrous should that individual leave the institution. All technical knowledge and capabilities are lost.

### **Home Grown Solutions**

An in-house or "home grown" solution is another option that will, in time, lead to a scalability problem. Although this approach may meet your current needs, it likely will not fit your needs down the road. It requires a significant investment, as well as dedicated and technically competent staff to develop and maintain such a system. Furthermore, as commercial systems designed specifically to fit the needs of higher education institutions become commonplace, it seems more and more unnecessary to try and reinvent the wheel.

### **High-End Enterprise Systems**

Several web CMS solutions adapted from the "Document Management" world have been implemented in larger higher education institutions. These systems were designed for large corporate clients, such as publishing behemoths, and offer a very costly solution to a much simpler problem. Because these systems were originally designed for a different market or designed to solve a different problem, they tend to fit poorly into the majority of college and university environments.

## Web Content Management for the Institutional Website

A select few web CMS solutions are available that focus specifically on solving the unique problems faced by colleges and universities today. The key is to find a CMS that is designed to meet your specific needs – a system that is used by thousands of like-minded users, administrators, and developers who have helped pave the way in web content management for higher education.

## Choosing a System That Fits Your Needs

So what are your institution's web CMS needs? What problems are you currently facing that need fixing? You'll want to conduct a needs assessment that identifies all the requirements of your institution. Then you can evaluate web CMS solutions based on how they meet those requirements. This is necessary to avoid overspending.

### Needs Assessment

Evaluate your needs by building and prioritizing your requirements. This includes looking at institutional requirements, site requirements, staffing requirements, technical requirements, and implementation requirements. Each of these areas contains questions that will guide your evaluators to certain features and ultimately the best solution.

### Institutional Requirements

1. *How much content really needs to be updated and how often?* It's important to evaluate not only what's currently being updated, but what really must be updated in order to achieve the goals of the institution.
2. *How many content contributors need to use the system?* Content contributors are the authors and editors of the content. Because a web CMS can empower non-technical contributors (e.g., staff, faculty, and even students) across all departments, they should be considered foremost.
3. *Will the content contributors' changes require approval before posting to the website?* A multiple-level authorization process might be necessary for an institution to consider different types of approval for editorial, design, and administrative changes. The approval sequence should allow for intermediary work and revision on the part of those in the approval chain. Alternatively, the submitted page would be disapproved and returned to the originator or prior reviewer, with the process starting again in a recursive manner.
4. *What is budgeted?* It's important to consider up-front costs and how much is budgeted over the lifespan of the product.

### Site Requirements

1. *Does the system need to be incorporated into a new site design?* Does it need to fit in with existing site architecture or a legacy cache of static pages?
2. *To what extent can/must the existing site be altered?* Some solutions require major modifications to existing site designs or migration to a proprietary database backend that can be both difficult and expensive to migrate into and out of in the future.

3. *If the institution is currently redesigning the website, will the web CMS fit with your desired new architecture? Or will the CMS require your structure to fit into its preferred structure?*
4. *For how many separate websites (physical or virtual) is the system needed? This is important to determine the up-front costs associated with most web CMS solutions.*

### Staffing Requirements

1. *Who are the content contributors responsible for the site content? It is likely these people won't have a high level of web editing expertise. The system should work for the lowest level of technical knowledge.*
2. *How much staff training time and expense can be afforded? The costs and time of training can be significant with a complex system. If people aren't properly trained, then the system will not be used.*
3. *Does the existing staff have the expertise and the time available to implement and maintain the solution? This is critical when evaluating a web CMS that is offered as a software solution deployed and maintained on the institution's servers. Some systems require a great deal of ongoing technical support from the institution.*
4. *How much support is provided by the CMS vendor that could lighten the load of existing staff? It's important for vendors to provide support and services that can save you time and money in getting your new system up and running, as well as help maintain the CMS over the long haul.*

### Technical Requirements

1. *Does the solution need to be hosted on an internal server or can it be in the cloud? There are a variety of web CMS solutions available that must be hosted on an institution's servers, and then there are some that can be procured via the cloud or hosted on the vendor's SaaS servers. There also are a few that can be deployed either way.*

The next three questions are tied together:

2. *Will the solution service multiple locations and multiple servers?*
3. *Does it need to be non-proprietary or platform independent?*
4. *With which operating systems does the solution need to work?*

These questions are most important when evaluating a CMS that is hosted on your institution's servers. A cloud application often minimizes these technical requirements.

### Implementation Requirements

1. *Is the solution needed for a departmental or campus-wide implementation? If departmental, will the solution need to migrate to include the entire campus down the road?*
2. *How quickly do you want the CMS to be deployed? Some systems can be implemented in weeks while others take several months or longer. The more changes required to your site and system, the longer the implementation. Also, the longer the training period, the longer it will take to be up and running.*

## Typical Areas of Overspending

Institutions that don't do their homework often find themselves spending tens of thousands of dollars on unexpected expenses after their purchase of a web CMS. These hidden costs are most typically found in additional training, site re-architecture, web servers, consulting, unnecessary features, and implementation and integration cost overruns.

**Training.** Because most web CMS solutions promise ease of use, training costs are often assumed to be minimal or completely overlooked. Avoid overspending by ensuring your CMS purchase includes comprehensive training and that non-technical content contributors give feedback on the training time required. Have them sit in on a demonstration or participate in hands-on testing of the product to see how comfortable they will be with the new system.

**Site re-architecture necessities.** Be aware of the potential for a required site re-architecture. Many web CMS solutions require substantial redesigns to the underlying data architecture, while others adapt and lend themselves to the website as it exists today. It can be quite costly, both short term and long term, to allow the CMS to drive the architecture of your website away from open standards and non-proprietary best practices.

**Web server impact.** Many CMS solutions integrate into the production website server, effectively taking over the job of content management and content serving. These solutions carry with them a hidden hardware cost in the form of required build-out of the institution's primary website server infrastructure. Look for "decoupled" or "push" style CMS solutions to avoid these hidden costs.

**Consulting.** CMS solutions that require substantial re-architecture to the website also generally require substantial consulting services. Additionally, content migration (if required by the chosen system) can be a substantial cost if it's something that must be done by an outside group. Ideally, content migration should be provided to you by the CMS vendor.

**Buying more than you actually need.** Avoid purchasing unnecessary bells and whistles. One of the most costly mistakes institutions make is putting together a list of features and functionalities driven by the most technical administrators (or outside consultants who might know more about the technology than your users' actual needs), then sending the list out for bid. When this happens, the winning bid is often bloated with unnecessary or unusable features.

**Implementation and integration.** The cost of implementation and integration with your current systems should not be overlooked. Choosing a system that embraces open standards and "fits in" with your existing legacy content as much as possible is ideal. Also, keep in mind that a solution deployed via the cloud can avoid many implementation and integration costs by effectively outsourcing a large chunk of this process.

## Essential Functionalities and Services

Although no one can accurately tell which web CMS is right for an institution without a close examination of the specific needs, there are six essential functionalities and services that any web CMS or CMS vendor should provide:

1. **Flexibility.** The web CMS should fit well and adapt to your existing website or newly chosen redesigned site architecture. Flexibility to provide proper tools for your content contributors to do their job is of utmost importance. In addition, flexibility of the CMS itself is important. While a web CMS might facilitate updates made today, the type and scale of updates may change tomorrow. If the web CMS is inflexible, then a secondary bottleneck arises in making changes to the web CMS itself. Web CMS technologies such as XSLT 3.0 provide efficiencies and flexibility for future growth and change.
2. **Scalability.** If the system is being deployed for a single department, but a campus-wide rollout is likely in the future, ensure the system can easily scale up to meet those growing institutional needs. Perhaps even more importantly, make sure the system is scalable to fit the wide diversity of content contributors across your institution – from the most technical to those who may only be comfortable using a word processor. And finally, make sure the system is scalable to embrace new technologies as “the next great thing” comes along. Systems designed around an open standards approach (rather than a proprietary structure) will help ensure this.
3. **Ease of use.** This might seem obvious, but each web CMS is really very different. Some claim to have in-context free-form editing, others offer user-defined templates, and still others offer the best of both worlds. The best CMS is the one that’s embraced and used by those who are trained to use it. Stay away from systems that were designed by engineers who focused on the needs of ecommerce or news/media sites (typically high-end database driven systems). Choose a system that works best in the unique environment of your institution and its constituents.
4. **Quick implementation.** Each day you wait to implement is a cost and a lost opportunity to your institution. Additionally, the longer the implementation process takes, the more likely you are to incur cost overruns. Look for a system that can be implemented within your desired timeframe.
5. **Comprehensive training.** Effective training is critical to ensuring that your experience with a web CMS is the best it can be. A CMS vendor should comprehensively train your trainers, administrators, and web developers on the features that most apply to their responsibilities at your institution.
6. **Ongoing support.** A relationship with your CMS vendor should not end after your implementation. The vendor should offer the highest level of customer service, allowing you to work without downtime and have peace of mind in the company’s ability to quickly come to the rescue when you need assistance. Customer support should also provide 24/7 coaching in the form of reference guides, videos, and online courses that are readily available to you and your users.

## Website Content Management Evaluation and Procurement Check List

### Institutional Requirements

- How much content really needs to be updated and how often?
- How many content contributors need to use the system?
- Will the content contributors' changes require approval before posting to the website?
- What is budgeted?

### Site Requirements

- Does the system need to be incorporated into an existing or new site design?
- To what extent can/must the existing site be altered?
- If we are currently redesigning the website, will the web CMS fit with our desired new architecture?
- For how many separate websites (physical or virtual) is the system needed?

### Staffing Requirements

- Who are the content contributors responsible for the website content?
- How much staff training time and expense can be afforded?
- Does the existing staff have the expertise and the time available to implement and maintain the solution?
- How much support is provided by the CMS vendor that could lighten the load of existing staff?

### Technical Requirements

- Does the solution need to be hosted on an internal server or can it be hosted on the vendor's server?
- Will the solution service multiple locations and multiple servers?
- Does it need to be non-proprietary or platform independent?
- With which operating systems does the solution need to work?

### Implementation Requirements

- Is the solution needed for a departmental or campus-wide implementation?
- How quickly do we want the CMS to be deployed?

**Essential Features and Services**

- Flexibility
- Scalability
- Ease of use
- Quick implementation
- Comprehensive training
- Ongoing support

**Cost Control**

- Have we covered all the bases of evaluation?
- Do we know how we plan to train users?
- Are we planning to re-design? Can we do this later?
- Are we going to need consultants? Do we have the budget for this if our selection requires consultants?
- Are we buying extra features we don't need?
- Will we need a required build-out of our primary website server infrastructure?
- Are we taking into consideration support services needed to get up and running?
- Do we understand how implementation and integration will work?
- Have we added up the total costs?

**Conclusion**

Selecting the best CMS to fit your institution's needs requires many internal questions, and the answers will determine key requirements for the institution. It's easy to fall into the trap of overspending if these questions are not answered. The goal is to buy what is necessary. Make sure to do the research to find the best product.

Many CMS solutions are "one size fits all." This is a potentially troublesome situation, particularly during a pilot program where your needs might be redefined later on. Ensure the initial costs and the long-term costs are priced to fit your actual needs. Additionally, pay only for what you need today by making sure the system is priced to grow as you scale up with more users.

Most importantly, know who is going to use the system. Remember that web content management is a framework designed for use by people. An institution's return on investment of any new technology is zero if no one accepts it. The very best CMS is the one that's embraced and used by those who are trained to use it.

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