CHOOSING A
WEB CONTENT MANAGEMENT SYSTEM

CMS TIPS, MYTHS, MISTAKES AND BEST PRACTICES

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Introduction

I'll never forget one of the first large-scale content management projects that I worked on as a web consultant in the 1990s. The client—a well-funded startup with Ivy League team members and a seemingly infinite budget—was spending over twenty million dollars on its web site and related marketing activities.

The client had selected a high-end content management system (CMS), which they planned to use for advanced functionality, robust workflows and complex access roles and user groups. The only problem was that the CMS product, which the vendor's salespeople had promised could get the job done, didn't exactly meet their business and technical requirements.

After spending almost a year in the planning and design phases, the entire project came to a screeching halt during development. Ten internal employees and more than 30 consultants had spent months and months of blood, sweat and tears working on the project, only to find that the selected CMS couldn't do the job.

So what went wrong? Dishonest CMS salespeople? Unrealistic expectations? Too many cooks in the kitchen? Or was it something else entirely?

The problem with this particular project could be summed up in two words: poor planning. The people at this company wanted to run before they learned how to walk. Initial project requirements were hastily defined and a CMS was selected without any regard for key business needs or the actual capabilities of the product. There was no pilot or proof of concept created to test the waters or validate the product's capabilities before the team was thrown into a full-blown "iterative" design and development approach.

If some of the terms and languages mentioned above don't make sense to you or if you're starting to break out in a cold sweat, never fear. This book is designed to provide a strong foundation and a clear understanding of CMS terminology and best practices, so you can avoid this type of scenario later. If this story sounds eerily familiar to you or you're already involved in a CMS project, this guide will serve as a valuable reference so you can see

where you've gone wrong in the past—and how to avoid or correct these potentially catastrophic issues moving forward.

Now that I've explained how this book can help, buckle up and let's get started…

Chapter One: CMS Overview

The CMS landscape can seem dizzying to someone who's not familiar with the industry. There are literally *hundreds* of web content management systems on the market today, and it's absolutely critical that you understand the different types of CMS tools and what they do.

More importantly, you also need to understand exactly what you or your company wants to do, so you can narrow down your choices and determine which CMS is the best fit for you. As the old saying goes, you need to decide where you want to go before you figure out how to get there.

What is a Web Content Management System (CMS) Anyway?

So you might be asking, what *is* a Web CMS anyway?

In the broadest sense, a Web CMS is **software that helps web teams maintain, change, control, repurpose and publish content, including text, images, photos, videos, audio or any other piece of web content**.

Web CMSs are a subset of Enterprise Content Management Systems, which are more robust and involve the management of other types of data, content or processes (frequently ones that are used internally within an organization).

Web content management systems—just like businesses—can take many forms with varying degrees of complexity. Some CMSs cost over $250,000 for the software alone (not including hundreds of thousands of dollars to be spent on design, development, customization, hardware or support costs), while others are free for the software with relatively small implementation costs. The CMS market is way too big for there to be a "one-size-fits-all" solution or a single "best" tool.

In addition, different CMSs have unique strengths and weaknesses. Some CMS tools focus on making content production easier, while others excel at content syndication or distribution.

However, CMS tools do share some common characteristics, features and benefits.

Why Do I Need a CMS?

Content management systems offer a wide variety of benefits, including:

- *Faster and easier content creation and publishing*, so even nontechnical people can quickly update some areas of a site without learning how to code

- *Decentralized content production* empowers multiple people within an organization to create content—no more relying on one group or department for all web site updates

- *Prebuilt functionality* allows companies to include robust features without involving backend developers

- *Complex content workflow capabilities* enable different users to create, edit, approve and publish content

- *Powerful, customizable templates* allow for consistency and a professional "look and feel"

- *Social media and collaboration features* allow you and your users to share and interact with your content more easily

- *User access control* enables you to define who has access to your backend and front end, as well what specific permissions they have in each area

- *Plugins, extensions and add-ons* quickly add features, functionality and integration capabilities to your web site, often without extra coding or technical resources

- *Multilingual support* makes it easier to translate, publish and manage multilingual content

- *Content syndication* allows you to more easily share and distribute your content across multiple sites or platforms

One of the most important reasons for utilizing a content management system is that you or your in-house team can manage some of your site's content (including text and images) yourselves, without hiring an external web developer for simple changes. With a CMS, you can create or edit pages, upload images, manage online forms and add or tweak metadata. This can represent a significant cost savings to you over time—although you should keep in mind that there are hidden costs if your employees are stretched too thin already, have other responsibilities or are paid more than an outside consultant.

Another huge benefit of CMSs is that they usually offer a fair amount of prebuilt functionality out-of-the-box. This means that you can create basic—or, in some cases, very advanced—functionality and features on your website without custom-coding anything. Need a login screen or password-protected pages? Even the most basic content management systems will allow you to do this with a few mouse clicks.

Some CMSs (particularly higher-end ones) allow content to be shared across multiple web properties. This will eliminate content redundancy, reduce duplicate efforts across departments, improve data integrity and save you time and money.

What Does a CMS Do?

To a certain extent, it depends upon whom you ask. If you pose this question to 10 different CMS vendors, you'll likely hear 10 different answers—each one customized to highlight that particular vendor's core features and offerings.

Remember that CMS tools at different levels offer drastically different features and functionality. Lower-end tools will usually focus on content production (especially the creation and editing of text), whereas higher-end and enterprise-level CMS tools offer more sophisticated features, functionality and integration capabilities.

Read the chapters about the history of CMS tools and defining your top 10 requirements to learn more about how to assess these tools without getting overwhelmed.

What Doesn't a CMS Do?

Sometimes my customers will say that they're glad to be implementing a CMS, because it will "make everything easier" for them. This is a huge red flag to me, and I always encourage those folks to remember that a CMS is not a panacea or a magic pill. It's simply another tool in your technology arsenal, and you will likely need many other tools if you want to build, grow and sustain your business.

While it's true that a content management system can improve your business in many ways, there are a few things that it cannot do:

- **A CMS tool will not teach you HTML, CSS, Javascript, PHP or any of the other development languages out there.** Do not expect that you will never need to hire a web developer again—particularly if you don't have these skills in-house. Most web sites, online stores, landing pages, email campaigns and other online web properties will require custom coding at some point if you want to establish a first-rate web presence. Unless you plan to obtain a web development degree, take multiple web development classes or hire someone with those skills for your in-house team, you will need to outsource some work on a regular basis for most sites.

- **A content management system will not drive traffic to your web site.** After your site is built, you'll need to market your products and services both online and offline. Remember, your website is just another customer touchpoint and sales vehicle for your business. People won't magically find you just because you have a website, nor will they magically convert to become customers, members or purchasers because you're using a CMS.

- **A CMS won't write better content or create better keywords and metadata**. If you're not intimately familiar with search engine optimization, you will need to hire someone to do this optimization for you.

- **A CMS will not plan your online marketing campaigns for you.** Whether you're creating an email blast, a banner or another online campaign, you'll most likely need to create landing pages, sales pages, confirmation pages, forms, autoresponder emails and more for each campaign. While a CMS can make it easier to build all of these, you'll still need an experienced project manager, content manager or marketing manager to help you plan, develop and implement them all. Don't underestimate the amount of work needed for each campaign, and don't expect that work to go away when you use a CMS. In fact, if anything, your team may have even *more* work to do because the content creation process will likely be easier.

- **A CMS will not necessarily shorten the web development lifecycle or simplify the process of building a website.** You or your project manager will still need to plan realistic timeframes for strategy, design, development and deployment tasks. You'll also need to set aside time in your schedule for the many tasks associated with planning and launching a site. I highly recommend to my clients that they utilize a project manager who has experience selecting CMS tools (if you haven't selected one yet) or who has utilized your specific CMS if you've already chosen one.

- **A CMS will not *necessarily* save you a ton of money initially**-- particularly as it relates to content strategy, interface design, information architecture, usability, quality assurance and online marketing. However, if you choose a CMS that offers pre-built functionality and you don't have a lot of custom development requirements, you will *almost always* see significant cost savings for development before launch and ongoing maintenance tasks after launch. There are some exceptions to this rule, though. If you add on a lot of extensions, third-party tools or custom coding, your

development costs can increase again rather quickly. **Simplify, simplify, simplify** your requirements…start small and build in more functionality once you know what you and your CMS can handle. This is the surest way to save money in your initial design and development phase and over the long run.

Can't I Just Build a Site without a CMS?

Sure, you could, but you'd be reinventing the wheel. Why recreate functionality and features that are included in many of the most popular CMS tools out there? You'll also spend a *lot* more time maintaining and adding new functionality to a hard-coded site later.

Trust me, there are very few reasons to build a web site 100 percent from scratch these days. (In fact, I cannot recall the last time we've done that at my web agency.)

What Do I Need to Know about CMSs?

It's absolutely critical that you follow the best practices, tips and processes contained with this guide when analyzing and selecting a new CMS. You can read it cover to cover or just focus on the chapters that are relevant to your situation right now, but make sure you take the time to really absorb and understand the material. You'll avoid a lot of costly and time-consuming mistakes, and you'll thank me for it later.

Are you excited to get started? So am I!