



CMS Buying Guide

How to choose the *right* content management system to achieve organizational goals



INTRODUCTION

It's no longer about if you're using a content management system. The question is, are you using the *right* one?

Content management refers to the systems and processes where information is created, managed, published, and archived. A content management system (CMS) provides the infrastructure for individuals and teams to effectively contribute digital content and collaborate through content lifecycles.

Content management and content marketing have evolved significantly over the past decade. Previously, websites were static, but that's changed. Now, it is more important than ever to continuously provide fresh and valuable content that is relevant to your target markets.

Now that the vast majority of institutions nationwide use some type of content management system, the discussion has moved from the benefits of a CMS to how to choose the optimal system for your needs.

For many organizations, there comes a time to replace an existing CMS with a new platform to alleviate pain points and help achieve organizational goals.

This eBook from Hannon Hill is intended to help you determine if it's time to make a change, define the current state of web activities, set organizational goals, compare feature sets, and avoid the 10 most common CMS buying mistakes.

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WHEN IS IT TIME TO REPLACE YOUR CMS?

There are many signs that indicate it's time to start planning for a new web content management system. Here are a few symptoms:

Usability

- Content contributors are unable to make simple revisions without technical support
- Despite training, content contributors struggle to learn the platform
- You have to start from scratch every time a new template is needed

Functionality

- You are at the mercy of third-party resources whenever your organization needs custom functionality
- Your CMS doesn't integrate with any content marketing tools
- Workflows don't match the way your business works
- URLs are not reader friendly
- It's difficult to prevent or track broken links

Development

- The product roadmap no longer meets the needs of your organization
- Upgrades are released too infrequently

Scalability

- Cross-site sharing is impossible
- Adding end users increases costs

Portability

- Migrating content is a daunting task
- It's not easy to move sites between development, test, and production

Support

- You're not getting the quality of technical support you need
- Lots of time is spent finding workarounds for bugs
- You're investing a lot of money in costly support contracts

Administration, Security and Maintenance

- Functionality is falling behind because upgrading is a major undertaking
- Frequent crashes result in website downtime
- Your site is vulnerable to malicious activity

QUESTIONS BEFORE BUYING A NEW CMS

When your organization has decided it's ready for a new CMS, take time to thoroughly evaluate business processes.

Current State

- How many websites and pages does your organization manage?
- How do you share content across sites?
- Who in your organization currently manages/updates content?
- How do you currently update your information and content?
- What types of content are updated frequently and infrequently?
- Are you currently using analytics as part of your content strategy?

Future State

- Who in your organization will use the new CMS?
- How many sites would you like to manage within the CMS?
- How important is it to achieve organization-wide buy-in?
- How long should it take to train technical users?
- How long should it take to train non-technical users?
- How important is it to measure content success?
- What would your workflow steps look like for publishing content?
- Do you intend to integrate social media or other business systems with your new CMS?
- What is the projected timeline for purchasing a CMS?
- What are the short and long-term web content goals?

Technology Considerations

- What type of client computing environment do you have?
- What type of server computing environment do you have?
- Do you have web programmers in house?
- Where are your business users located?
- Are your websites organized by sections?
- What type of user authentication do you have in place?

Vendor Assessment

- How would you (the vendor) describe our (the customer) web content needs?
- How many support contacts do you allow per organization?
- How do you solicit and incorporate customer feedback into the product roadmap?
- Which migration approach do you propose?
- Which integration approach do you recommend?
- Can you explain our total cost of ownership?

DEFINING SUCCESS

Once your organization understands its needs, it's time to define the goals you'd like to achieve with a new CMS.

Sample Goal One: Reduce costs by streamlining processes, utilizing cost-effective products, and outsourcing hosting and maintenance.

- Implement a CMS with favorable pricing, but still scalable
- Reduce time to create new content by simplifying the process end-to-end
- Reduce the time it takes to train end users by implementing an intuitive, system
- Reduce dependence on developers and vendors by implementing a system built with non-technical users in mind
- Reduce time spent on maintenance by engaging your CMS vendor for backups, restores, user provisioning, and upgrades

Sample Goal Two: Increase revenue via greater enrollment numbers, increased donations, and more.

- Improve the visitor experience by improving the information architecture, focusing on searchability, and filling content gaps
- Increase conversion rates and optimize follow-ups by adding more calls to action, forms, landing pages, and tracking customer journeys
- Increase web traffic via improved SEO, fresher content, and more social sharing opportunities
- Conduct more effective marketing by tracking all marketing data and adjusting based on what's working

Sample Goal Three: Further the mission of the organization by increasing exposure, widening reach, and promoting staff credentials.

- Increase the amount of fresh content produced by enabling content contributors to view which assets have not been updated in a certain amount of time
- Feature strategic content prominently via a variety of channels by implementing COPE (create once, publish everywhere)
- Promote faculty and staff accomplishments by creating a directory and/or newsroom with easy-to-swap content blocks

COMPARISON CHECKLISTS

With both current and future state defined, you're ready to talk features and compare different content management solutions.

With so many content management systems on the market, it's critical to choose the one that's best aligned to your organizational needs and goals.

The *right* CMS will strengthen your organization by empowering content contributors, developers, administrators, and marketers to create fresh, quality content and publish it without IT or third-party bottlenecks.

Choosing the wrong CMS, however, can wind up being ineffective and financially unsound.

While the following feature comparison charts are by no means comprehensive checklists, they should provide a solid foundation to make a well-informed CMS purchasing decision.

We've checked off the features available in Cascade CMS, and left space for comparing competing products.

Feature comparisons charts included:

- Compatibility
- Security
- Open Standards Support
- Content Editing
- Content Lifecycle
- Automatic Navigation
- Users, Groups, and Roles
- Publishing
- Workflows
- Social Media
- SEO
- Analytics

Compatibility

Item	Description	CMS 1	CMS 2	CMS 3
Browser-based	Full application functionality from a standard web browser without plug-ins or downloads	✓ ...and Safari		
Supported browsers	Support for Chrome, Firefox, Internet Explorer	✓		
Supported browsers for content output	Resulting content compatible with all standard browsers	✓		
Supported client operating systems	Support for Windows, Mac, and Linux	✓		
Supported server operating systems	Support for Windows, Mac, and Linux	✓ ...and Nginx		
Supported web servers	Support for Apache, Microsoft IIS, iPlanet, and Lotus Domino for published content	✓		
CMS implementation	Implement CMS as either a server-installed application or vendor-managed hosted solution			
Server-side scripting languages	Support for server-side scripting languages including ASP, PHP, ColdFusion, JSP, Perl, SSI, and Python	✓ Support for MySQL, Oracle, and SQL Server		
Supported databases	Support for SQL-compliant databases with an ODBC interface including MySQL, SQL Server, and MSDE	✓		

Security

Item	Description	Cascade CMS	CMS 2	CMS 3
Encrypted client / server interaction	Support for SSL 256 bit encryption	✓		
Encrypted user passwords	Password encrypted in the database to prevent compromised access	✓		
User authentication with sessions / cookies	After a user is authenticated, a cookie with only a session value is stored in the browser	✓		
Content audit	All content changes are linked to the specific user	✓		
Log in and log out audit	IP address is captured and stored with each log in and log out	✓		

Open Standards Support

Item	Description	Cascade CMS	CMS 2	CMS 3
XML data	Support for XML data stored and published content	✓		
XSL transformations	Support for XSL when transforming and repurposing content into different formats	✓		
Velocity transformations	Support for Velocity when transforming and repurposing content	✓		
Unicode storage	Support for Unicode content providing multi-language content management	✓		
CSS	Support for CSS-based design	✓		
SMTP email	Ability to send email through a standard SMTP server	✓		
XHTML output	Standards-based XHTML content output	✓		
HTML5 support	Support for HTML5 for better output to mobile devices	✓		

Content Editing

Item	Description	Cascade CMS	CMS 2	CMS 3
Browser-based word processor	Inline WYSIWYG processor for HTML / XHTML input	✓		
Spell checker	Spell checker with user dictionary for adding custom words	✓		
Link checker	Ability to notify users of broken and dead links	✓		
Accessibility checker	Check for 508 compliance for people with disabilities	✓		
Cross-site content sharing	Easily share content across sites using structured content blocks	✓		
Image editing	Edit images from within the CMS and support Flickr feeds	✓		
Third-party HTML	Ability to copy and paste HTML from third-party programs like Dreamweaver	✓		
Library services	Ability to check out content, locking it to specific users	✓		
Form builder	Create custom forms with progressive profiling capabilities, autoresponders, and email alerts	✓		

Content Lifecycle

Item	Description	Cascade CMS	CMS 2	CMS 3
Standard content creation	Ability to set up pre-defined content defaults, allowing users to create new content based on existing standards	✓		
Version control	Automatically create retrievable content backups	✓		
Track content changes	Track changes between content that's been updated	✓		
Content search and retrieval	Ability to conduct a full-text search of content and metadata	✓		
System information about content	Store relevant information about content including name, folder, creation time, and more			
Scheduled start and end date	Ability to schedule start and end (expiration) date for content			
Content expiration notice	Automatically send emails at specific intervals when content is about to expire	✓		
Recycle bin	Ability to retrieve deleted items from a recycle bin	✓		

(this is sort of a stretch...I feel that it is far from automatic)

Automatic Navigation

Item	Description	CMS 1	CMS 2	CMS 3
Sitemap generation	Ability to automatically generate a complete sitemap and exclude certain pages on demand			
Context-sensitive navigation	Navigation menus automatically generated based on current page folder			
JavaScript navigation	Custom JavaScript and DHTML pop-up menus created automatically	✓		
Available page formats	Links to available page formats automatically generated	✓		
Flexible templates	Create any type of template with no limitations	✓		
Separate content from templates	Separate content portions of a page from the template			
Definable regions	Ability to define regions in a template where content can be plugged in via a visual interface			
Standard content output	Support for templates to generate HTML, XML, and PDF content	✓		
Content syndication (RSS)	Ability to push RSS feeds and consume external RSS feeds	✓		

(this could be misleading...it actually requires a bit of work)

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...and RTF, JSON, JS, CSS

Users, Groups, and Roles

Item	Description	Cascade CMS	CMS 2	CMS 3
User management	User management system that scales for organizations of all sizes at no additional cost	✓		
Group management	Group management system designed to organize users according to department	✓		
Access rights	Configurable content access rights designed to prevent unauthorized access	✓		
Roles for permissions	Roles-based system supporting common user-types like content contributors and administrators	✓		
User reporting	Ability to report which users recently logged in, what IP address they came from, and the date and time	✓		
LDAP integration	Ability to authenticate users against an LDAP-based system	✓		

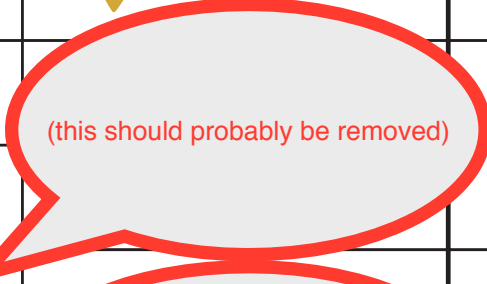

Publishing

Item	Description	Cascade CMS	CMS 2	CMS 3
Multi-server publishing	Ability to publish the same content to multiple servers for load-balancing and mirrored server environments			
Multiple domain names	Support for managing content for multiple domain names from a single content repository			
Publishing protocols	Ability to publish content through FTP, SFTP, VPN, mapped network drive, ZIP file, or local system			
Publishing formats	Support for publishing content in standard formats including XHTML, XML, and PDF	✓		
Publish reports	Generate a publishing report detailing content to be published, length of the process, and issues	✓		

Ability to publish content through FTP, SFTP, database, local file system, and/or mapped network drive.

...and RTF, JSON, JS, CSS

Workflows

Item	Description	Cascade CMS	CMS 2	CMS 3
Configurable workflow	Ability to create custom workflows in XML with no limit on the number of steps	✓		
Email triggers	Support for email triggers at each step in the workflow			
Step publishing	Ability to have content published automatically at a specific step with user approval			
Extensible triggers	Support for developing custom triggers to talk to legacy systems or third-party applications			
Dashboard	User-specific dashboard outlining current and complete workflows			
Ad-hoc notifications	Ability for users to modify the person responsible for each workflow step on an ad-hoc basis	✓		
Workflow filters	Ability to filter certain steps based on a specific group or user role	✓		

Social Media

Item	Description	Cascade CMS	CMS 2	CMS 3
Social media connectors	Ability to connect to popular social media channels like Facebook, Twitter, and LinkedIn	✓		
Blogging	Ability to manage blogs inside the CMS, as well as the ability to push to third-party tools	✓		
Social content promotion	Ability to push content to social media channels on an ad-hoc or scheduled basis	✓		

SEO

Item	Description	Cascade CMS	CMS 2	CMS 3
SEO-friendly URLs	Create search engine friendly URLs based on directory structure	✓		
Problem checking	Quickly check published site for problem links and page load times	✓		
SEO quick check	Run an SEO score on both site and individual page levels	✓		
Keyword analysis	View keyword difficulty and ranking	✓		

Analytics

Item	Description	Cascade CMS	CMS 2	CMS 3
Google Analytics	In-context analytics through connectors to best-of-breed analytics tools	✓		
Social analytics	Track traffic generated from social media	✓		
Search terms and keyword alignment	Check if search terms visitors use to find your site are aligned to your goals	✓		
Campaign tracking	Tag marketing efforts as belonging to one or more campaign	✓		
Advanced reports	View reports on competitor sites, inbound links, referral sources, and traffic sources	✓		
Conversion rates	Track form conversion rates	✓		
A/B testing	A/B test multiple content pieces with detailed analytics on each	✓		

TOP 10 CMS BUYING MISTAKES

Finally, once your organization knows exactly which features it needs, take caution to avoid these common purchasing mistakes.

1. Needing a specific feature, only to learn that it is an additional cost

While you may easily imagine the benefits of impressive add-ons and modules, the vendor might not have clarified that these wonderful features are only available at an additional cost. Be aware of features that drive up the total cost of ownership, and make sure you understand what you will get for the agreed price.

2. Choosing a CMS that doesn't help you manage multiple sites

For many organizations, the decision to purchase a CMS arises from the need to manage content across different sites. Whether you have one site or a hundred, some CMSs make your job much easier than others.

First, make sure the CMS you select makes it easy to share content between sites. Second, be sure you choose a CMS that allows for unlimited sites and pages. Some CMS providers charge more for more content, so this can also significantly drive costs up.

3. Failing to think strategically about *future* needs

A CMS is a big purchase, so it's important to choose a system that will expand according to future needs. You will find certain content management systems excel at certain functions, but are too narrow overall. A CMS that is designed specifically for article-based content, for example, may provide an outstanding interface for creating new articles at the expense of restrictions on other functionality.

4. Not understanding access permissions for assets within the system

Access permissions are a very important part of any well-designed content management system. If no safeguards are put in place, there are many ways that a non-technical user can break the design of a template or enter unapproved content. Likewise, department-specific users should be limited in the access they have.

Be sure to inquire about types and levels of access permissions. The more granular control that you have over system areas, assets, and individual regions of a document, the better suited your CMS will be for your organization.

5. Failing to consider SEO

Making smart decisions about search engine optimization makes your website incredibly valuable. Most CMS products offer some form of search engine optimization, but some do not allow you to associate metadata with asset types like images, videos, folders and external links - all of which help with SEO.

Look for a CMS that has built-in metadata fields for all asset types, allows custom metadata fields to be added, and lets administrators require end users to fill out custom and pre-built metadata fields.

6. Failing to understand the importance of multiple output formats

The surge in mobile web browsing has been astounding. It is more important than ever to have multiple outputs for visitors browsing on smart phones, tablets, desktops, and more. Your CMS should automatically repurpose, edit, and update new content for all desired outputs, and automatically propagate content changes throughout all outputs.

7. Getting locked into pre-defined templates

Some CMS products require you to use pre-built templates provided with the system. While sample templates may be useful in some cases, if you do not have the option to design your own templates or modify the sample templates, you may find your organization is unreasonably cornered into restricted design options.

8. Not evaluating the support community

One of the most frustrating experiences a customer can have is when something goes wrong but no one is available to support it. Even the most well-designed CMSs have a level of complexity to them, and being able to call in the experts from time to time is an important safeguard to have. Take the time to evaluate both the support and continuing education opportunities offered by your CMS provider.

9. Ignoring standards compliance and accessibility

A CMS may offer great features, but you might run into integration issues if they are not written according to universal standards. Web services or an open API will enable greater flexibility and customization. It's also essential that content managed by your CMS is compliant with the latest web standards for accessibility.

10. Using a CMS provider that doesn't understand content marketing

Ask questions about how CMS providers empower users to create a cohesive content strategy. When used in conjunction with a content marketing tool, your CMS will take your content strategy to the next level.



WANT MORE INFORMATION?

Cascade CMS, Hannon Hill's award-winning content management system, takes enterprise web strategy to the next level. With built-in tools to eliminate stale content, increase digital outreach, and ensure the best possible site audience engagement, it's no wonder Cascade CMS powers more than 24,000 sites across the globe.

Spectate from Hannon Hill is an inbound marketing software platform that enables you to track, optimize, and measure your company's website, content, and visitors.

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