ENGINESS

10 Questions to Ask When Selecting Your Next CMS

In Search of a New CMS

Content is the lifeblood of any website, and a content management system (CMS) is the heart that keeps the blood flowing.

In this book we have collected some important questions you should ask when you're either choosing a CMS for the first time or changing from your existing system.

But first, what is a CMS?

A content management system is a web application that lets non-developers quickly and easily update, add to, and edit a website, mobile app, and other front-end expressions of content.

There are literally hundreds of CMS platforms out there, and they sit in two general camps:

- Open source, like WordPress, Joomla, or Drupal
- Proprietary, like Advantage CSP or Sitefinity

Understanding the basic idea behind a CMS, we can start looking at what questions to ask when you're scoping various platform and vendor options.

About Us

Enginess is a Toronto-based digital consultancy. We shape strategies for business processes and deliver solutions that enhance customer experience, improve efficiencies, generate new market opportunities, and redefine value creation for industries.

Think we might be able to help you? Get in touch.

@enginessio

@enginess

@enginessio

Table of Contents

1. What do you want your CMS to do?

It's an important question, even though it seems obvious. Before you start looking at vendors, you want to establish requirements – what do you want your CMS to do?

To do that, you'll need to establish key pain points not being addressed by your current system. Then, you'll need to consult the various parties who are going to be using the new CMS and find out what they want.

What features are top priority for them? What features are more nice-to-have versus need-to-have?

The parties to consult might include:
- Developers
- Designers
- Internal teams
- Content creators (e.g. marketing managers, content coordinators)
- External people (freelancers)

Finally, you'll want to establish a list of focal needs. These are divided into *Idiosyncratic Requirements* and *Priority Requirements*.

Idiosyncratic Requirements are requirements that are unique to your company.

Priority Requirements are requirements that are pretty general when it comes to a CMS, but for some reason are important to you. For example, if you have a large amount of legacy data, then integration into older systems would be an extreme priority requirement.

2. Is it easy to use?

Ease of use is far and away the most important thing to look out for when you're choosing a new CMS. If you can, try it out first, and get the end-users to try it out too.

One challenge for large organizations is the team or team member responsible for picking a new CMS is usually not the only person using it.

Fortunately, most companies will give you a CMS demo account to try before you buy. When you're trying out a CMS, you're really looking for two things.

First, find out if common, everyday tasks are fast and easy to do. For example, is it easy to create, place, and edit content for your website? That's something that people are going to need to do all the time, so you'll want it to be nice and simple.

Second, are complex tasks intuitive to figure out? If it's a well-designed CMS, then even if you don't do something daily, you should be able to figure out how to do most tasks without having a CompSci degree.

Don't forget – at the end of the day, your CMS ultimately has two functions:

1. To allow non-developers to update your digital platforms

2. To be *extremely easy* for non-developers to use
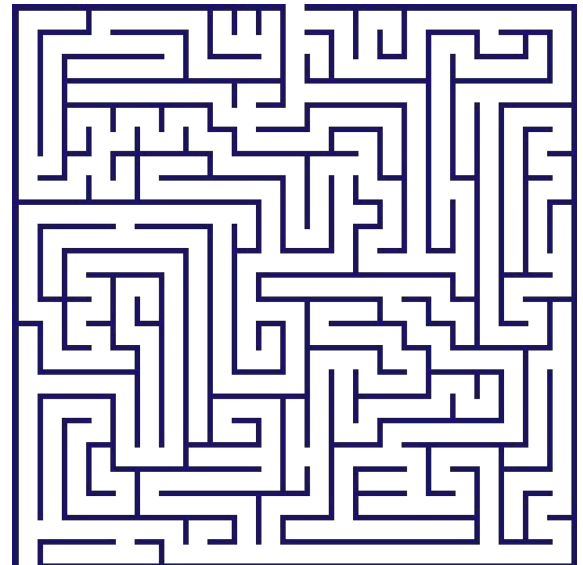
Which is why this question is so important. Various users are going to be interacting with your CMS. For the most part, these users won't have the same expertise as developers. Your CMS is no use to anyone if you need to call in a dev team every time you want to upload a blog post.

The best way to test the usability is to actually test a CMS. Develop a list of tasks that mimic everyday use of the CMS.

For example, creating a news item. Get a few people from around the organization who will be hands-on with the platform to try to complete the tasks you set, and give you feedback on their experience.

It's worth spending a little extra time trialling every CMS from your shortlist. Usability is what's going to make your CMS either a dream come true, or a total nightmare.

3. Will it help hit target goals?

We live in a world where everything has an app, and it's tempting to reach for tech for every solution.

Don't forget that a CMS is a tool to address a specific problem. If you're having trouble getting buy-in for content marketing, you're struggling to get content created in the first place, or your content strategy isn't in place securely, then a CMS might not be the solution.

Don't think that an expensive CMS is a substitute for a content strategy. Let's say your goal is to increase social followers for your business. A CMS probably won't help much with that goal. Creating great content will.

Conversely, if your goal is to upload more content and the roadblock isn't in creation, rather IT is just way overworked, a CMS would be a valuable asset.

You need to understand the problem clearly to see what CMS is right for you.

4. What is the Total Cost of Ownership?

Price shouldn't be the only thing you look at, but for most of us it's a critical factor in our decisions.

When you're picking a CMS, you'll want to understand the setup costs, as well as the ongoing licensing fees (if any), and the services that may be included.

If you're looking at budget-friendly options, there are many open source CMS platforms available, probably most well-known of which is WordPress.

However, open source has its problems – namely, the support (which we'll get into in a minute) is community-based, and there tends to be greater security risks associated with the open source nature of its plugins.

However, due to the enormity of the open source community, there is usually a unique solution to virtually any problem.

For example, consider the sheer volume of WordPress plugins available for free. Proprietary software is generally more secure, has better support, and is often better run from a back-end perspective since the hardware is often optimized for the CMS you're using.

The flip side, of course, is it may cost more upfront.

That said, in some cases, there are some other costs to be aware of:

- Multiple user-licenses
- Updates and maintenance costs
- Training costs
- Platform upgrades and extensions
- One-time purchase fee

Make sure you ask about these so there's no confusion and CMS heartbreak down the line.

5. Does it integrate easily?

If you have older systems, be sure to ask about this. Many industries, including healthcare, logistics, or retail, have specific software that they may need to integrate in a new CMS.

Another consideration is migrating your existing content to your new platform. You want to make this process as easy as possible, and you want to do it without losing any of your content.

Ensure you ask how your shortlisted CMS platforms perform in this regard, or if the vendor will facilitate the process for you.

And if you can, try and migrate some content to see how it goes.

6. Will it hurt my SEO?

You don't want your CMS to have a negative impact on your website.

If you're migrating to a new CMS, you want one that's going to be compatible with your current analytics setup. That way, you won't lose that valuable data, and it will make actually analyzing that information much easier down the road.

Another thing to think about is SEO. You want a CMS that's going to follow best practices to help your site get ranked, mostly by making sure it's easy for Google to know what each page is about, and what your site is about in general. You want to be able to:

• Edit text appropriately: meta descriptions, title tags, and keywords
• Publish updates to your site map
• Create friendly URLs
• Find (and delete) duplicate content

The most important thing for SEO is to actually produce interesting content, but all these little details help ensure Google and other search engines can find your stuff and know what it's about. They're small steps to take to make sure that your content generation efforts aren't wasted.

There are plenty of on-page and off-page SEO techniques you can implement to help people find your site and push it up in the search rankings. And much of this can be automated to make your life easier. You should look for a CMS that will help you do that.

For example, your CMS should:

• Help create an optimized meta description
• Make it easy to create metadata for your content
• Make it easy to create alt tags for your images
• Incorporate H1 and H2 headings seamlessly

These little things are just that – little. But they do make a difference over time and most importantly, can be agonizing to implement with each piece of content you upload. It's best to look for as much automation as possible.

7. How reliant on plugins is the core functionality?

We often refer to our love/hate relationship with plugins on our blog.

On the one hand, an open source platform with a plugin-rich environment like WordPress means no matter what you need, there's always a plugin out there.

However, what's emerged is a situation where many CMS platforms – especially WordPress – rely on plugins for system-critical functionality.

And while plugins do a fine job of enabling that functionality they also slow down the site and open the door for compatibility and security vulnerabilities.

So before you buy or change, make sure you know what comes built-in and what comes bolted-on.

8. What's the scalability of your CMS?

You don't want to have to go through the effort of porting over an old CMS into a new only to outgrow it 18 months down the line. You should be looking not only for a CMS that suits your needs now, but will grow with you as your needs evolve.

For example, let's say you decide you want to go for a basic open source CMS, because you just need a new site launched quickly.

Will that same platform support your marketing goals in 6-12 months?

Will it support user management for a larger team when you have multiple staff members carrying out different tasks on the platform?

Will it integrate with the CRM you're planning on migrating to next year? And if it doesn't now, will it when you decide you want to enable those features?

Websites tend to get more complicated as they (and their respective businesses) grow larger.

Make sure that you think of the future as well as the present when you're considering your website and CMS needs.

9. Does the CMS create a positive user experience?

Does your website provide a good user experience? Do people like to use it or hate it?

This will come in part from how you use the CMS, but much of this will come down to the CMS itself.

For example:

- Is the CMS admin intuitive and easy to navigate?
- Is the back-end quick with a fast load time?
- Does the CMS let you organize the site in a way that makes sense?

Make sure that you investigate not only the potential of your chosen CMS, but a realistic representation of what you can get your CMS to do.

Drupal, for example, provides huge flexibility – if you know what you're doing.

There's no point falling in love with a site only to discover you're not equipped to recreate what you saw for yourself, or it requires a significant additional investment to bring the platform up to the where you want it to be.

10.   How is it supported?

The make or break for most CMS is user experience, and this ties back directly to the available support channels.

How quickly you can call, email, or message someone to help you through your problem, and how that experience goes, is a huge part of your CMS experience, but also one of the hardest to test.

Generally speaking, there are two kinds of support: community support and direct support.

Community support

This is a term usually associated with open source CMS platforms like WordPress or Drupal, although some more prevalent proprietary systems have communities in place as well.

It's usually a forum-type setup, where each question asked by someone is answered by the community at large, and each question/solution can be searched and viewed whenever you want.

Community support can be useful for common problems, but when you invariably run into a unique or time-sensitive issue, you may not want to wait around for the community to work it through.
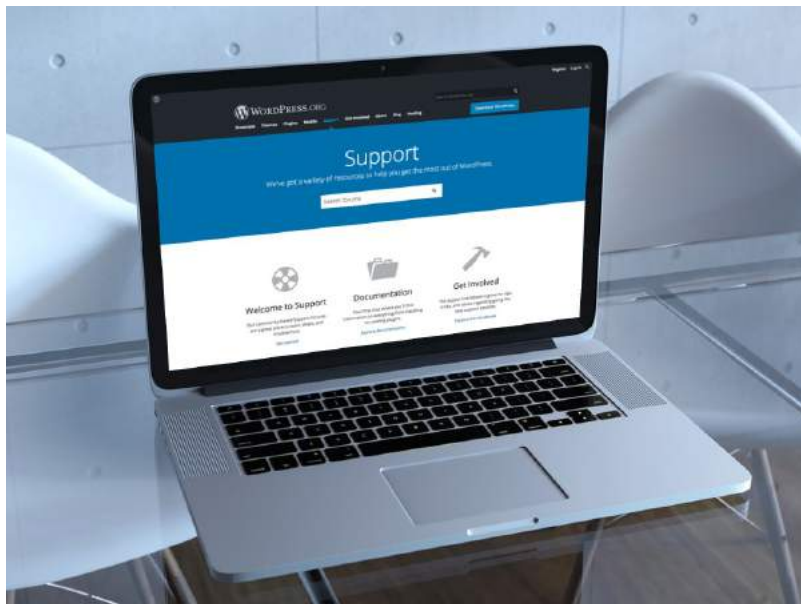
Plus, if (or when) the community delivers your solution, you'll still have to actually fix the problem yourself.

Direct support

Direct support is when you call a number, message a chat window, or send through an email (sometimes called a ticket) and someone responds directly to you.

Direct support makes solving most of your problems much faster and easier, and you know that you're getting a qualified support technician, rather than someone's opinion (as often happens in a forum setting).

Direct support is also invaluable for those few times that you desperately need your site to work. For example, if you find a bug in the checkout flow of your e-commerce site in December, the community route is just too slow.

When you're shopping around for a new CMS, it's worth doing thorough research into the type of support you'll receive from your vendor. If you opt for a proprietary piece of software, this is a core service you're paying for, so make sure you trial it along with your CMS.

Recap

When you're looking at a CMS implementation, the key questions you want to ask are:

1. What do I want my CMS to do?
2. Is it easy to use?
3. Will it help hit target goals?
4. How much does it cost?
5. Does it integrate easily?
6. What SEO automation comes as standard?
7. How reliant on plugins is the core functionality?
8. Does the CMS facilitate use on mobile?
9. What's the scalability of the CMS?
10. Does the CMS create a positive user experience?

With these considerations in mind, you can't go wrong.

We hope you've enjoyed this guide, and that it equips you with valuable information you as you select your next CMS.

If you want to speak about your project, we would be glad to help in any way we can.

Contact us:
Mike Phillips
t: 416 346 1684
e: mphillips@enginess.io