

## CMS Buyer's Guide

*Selecting a CMS That Supports Your Business*



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## Introduction

How do you go about selecting a CMS in a business environment that is characterised by customers who expect to be able to move seamlessly between different devices throughout the buying process?

Customers and employees demand to engage with you on whatever device they have within reach, and at any moment. They also expect the experience to be great, and increasingly to be personalised.

The information you scaled for desktop computers needs to be made available for today's mobile phones and tablets, but also prepared for channels and devices that are still on the drawing board. Your content needs to be used and re-used in multiple channels and for multiple purposes.

The data that you collect from users, whether they are customers or employees, needs to be turned not only into insights for you, but also customized and personalized solutions because customer expectations are more demanding than ever.

The business systems you are using need to be integrated with your CMS in order for you to create the great and useful experiences users are expecting.

To meet the expectations of the connected and engaged user, enterprise businesses have to ask themselves, what do our users need? What task(s) are they trying to solve? When, where and how can we help them? The type of device is less important because users expect that they can use any device they choose to use in a given situation: if I am comfortable buying my trip around the World using my smart phone, then I expect to be able to do just that.

How do you decide which CMS fits your business needs? What kind of technology do you need to look for? And is it possible to predict what will work and what won't in a year? In order to buy a CMS that supports the growth of yours business we suggest that you:

- Create a cross-divisional team with people who know your business, users and systems.
- Develop a business case built on your goals and strategies.
- Get to know your users and their behavior.
- Consider how you'll reap the benefits of your investment by looking at governance before you buy.

### About this guide

This buyer's guide focuses on how you can prepare and ensure that you purchase the best CMS for your enterprise. It is not an evaluation of specific products. The intention is to give you guidance to undertake the right analyses and ask the right questions of your own organization, your users, vendors and implementation partners.

The advice given in the guide is based on knowledge gathered from J. Boye members, interviews with people in the industry and technical experts.

## How to use this guide

The purpose of this guide is to provide you with key insights that you can use when planning to invest in a new CMS. It touches upon the current trends, general insights and guides you through how to manage the buying process. The guide is divided into two parts:

- *Part one* is a high-level description of what to look for in a CMS in the current market;
- *Part two* is an actual guide to choosing the right platform for your business, including a step-by-step plan that you use for your own project.

Throughout the guide we have raised questions for you to consider before buying a CMS. These have all been listed in a “cheat sheet” in appendix A.

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## Part One: What to look for

Creating and managing content and digital experience is for the most part a fairly complex affair, especially if you are aiming for a customer-centric approach. In this section we will take a closer look at key parameters to take into consideration when choosing a CMS that will support your business through this transformation. We'll look at:

- Managing experiences
- Extensibility and integration with key business systems
- Multi-device strategies
- Content creation and multi-channel publishing
- Governance and reporting tools

### Managing experiences

Digital experiences are not limited to your website. Your customers meet your messages in multiple channels across multiple devices. For most enterprises, it's a significant challenge to create consistency and relevance throughout all the touchpoints of their customers' journeys. While your organization might not be quite ready for full-blown personalization and customer journey management, you might want to consider whether your next CMS should have at least a minimal set of tools for personalization, multi-channel, multi-device and reporting.

When managing your customers' digital experiences the true test is this: can users solve their problem in their current context, and is the content and call to actions you provide them with consistent and relevant across multiple channels and devices? Your users do not want to go home to their desktop and compare your product to another online. They want to be able to get real-time information in the aisle of a store on the device of their choice.

The connected customer/user expects to be able to engage on his or her own terms. Enterprises need to understand how to use multiple channels and platforms as catalysts for connecting and managing their customer experiences in order to provide users with seamless experiences of their brand. This means that your CMS needs to support and to be part of your overall customer experience management and help ensure a consistent experience throughout all touchpoints. It also means that the data you collect about your users in the CMS should be in a form that can be used both to enhance experiences, and be shared with other parts of your organization as context for optimizing the customer experience with every touchpoint.

#### Questions to consider

- What does my customer journey look like and where are the digital touchpoints?
- How does the CMS support personalization?
- How does the CMS support content through multiple channels?
- How does the CMS allow me to track and report user behavior?
- How will the CMS become an asset in my overall customer experience management?

## Extensibility and integration with key business systems

Business requirements change constantly and you want a CMS that allows you to incorporate new services and functionalities without having to change the system you are using. By opting for extensibility you make it easier to upgrade the entire platform, add new applications and enhance old ones. This makes your platform more adaptable to change and less expensive to maintain.

The days of black box systems might not be completely over, but your new CMS needs to be easy to integrate with by design. Creating engaging and personalized experiences requires access to data and to other channels. Integration with CRM, email campaign management tools, marketing automation solutions, analytics and social media campaigns are a must for every contemporary website.

### Questions to consider

- Is the CMS designed to integrate out of the box?
- Is it possible to integrate user data with analytics from other platforms?
- How often will I need to update and integrate with new applications?
- How often will I need to update functionalities?
- Which business systems do I need to integrate with?
- How many of my required functionalities are standard in the CMS?
- Will I have the support of in-house developers or will I need to buy outside help when integrating or developing?

## Costs and pricing models

With the pace of technological development, uncertainty within the next year, even within the next few months, can make it difficult to figure out what your CMS should cost in terms of purchase and implementation as well as development and maintenance. This is why it is important that you look at the expense of developing compared to the business value you expect to get out of it.

When looking at purchasing a CMS, you need to focus on the cost of integration with other systems, extensibility and how well will this platform will adapt to changing business requirements. You want to have a clear idea of the pricing model:

### Questions to consider

- What is the total cost of ownership, including licences, support, development, hosting?
- Does the license scale with additional servers without adding extra cost?
- What is the cost of upgrades and if applicable new modules?
- What will it cost you to maintain and support your mobile endeavors?
- What kind of licensing model will fit your organization?

Other things to consider:

- A standard system that comes with a set of modules that you can add on as you get ready for more channels or functionalities.
- If you have many special requirements for integration with other systems it might make sense to purchase a system with a more custom set-up.
- CMS is not just a project and should not be funded as such. Enterprises must realize that their CMS is business critical and as such it should figure on the maintenance budget along with other business critical systems and products. Both in terms of how do we keep developing and in terms of how do we maintain and support.

### Multi-device strategies

Purchasing a new CMS without considering your strategy for multiple devices won't do. There are several ways to cater for multiple devices. Before deciding on one or other solution, take a step back and consider your customer journeys and touchpoints.

Getting your entire enterprise geared for all the devices that are available is probably going to be both too big a bite to chew, and not necessary at this time. Unless you have a very good business case, wearable devices - smart watches, fitness trackers, etc - are unlikely to influence CMS selection. More appropriately, mobile and tablet will have the biggest influence.

Take it step by step and start with implementing the mobile touchpoints where you gain the most. When looking at a new enterprise CMS, look at how it can support customer experience management with respect to mobile. You want to look at whether the backend allows you to track, assess, develop, test and preview on multiple devices. At the very least you want to be able to preview how your content behaves on different devices directly from within your CMS.

Although mobile is no longer a maybe but a prerequisite there are still many enterprises who are seeking the answer to the right way to make their content, not just UI, mobile. Table 1 on the next page provides you with an overview of pros and cons of different mobile strategies.

	Device	Pros	Cons
<b>Mobile website</b>	Mobile devices	Reach; High quality content and multiple devices; Easy to develop.	Duplicate content; Multiple URLs (SEO); More maintenance of content.
<b>Responsive web</b>	All devices	Adaptive and flexible; Same experience and content on all devices; SEO friendly; Co-exists with other mobile strategies.	No offline experiences; Lots of testing across devices; Integration with native apps.
<b>Web app</b>	Mobile devices	Reach; Interaction and transaction.	Commitment from users: need to download and keep; Expensive to develop, test and manage; OS updates
<b>Hybrid app</b>	Mobile devices	Blend of reach and engagement; Uses the best of both web and app.	Commitment from users: need to download and keep; expensive to develop, test and manage; OS updates
<b>Native app</b>	Mobile devices	Supreme interactive experiences; Option of being offline; Integration with other applications; Transaction and push.	Commitment from users: need to download and keep; Expensive to develop, test and manage; OS updates; Risk of costly black box development.

Table 1 - Mobile strategies, pros and cons

Any of the options can work or be right. It is a matter of understanding the business landscape you are in, knowing your users, their context and most importantly, their goals. If customers go to your desktop site on a mobile device and have a bad experience, it can rub off on their overall feelings towards your business. For this reason, you might want to start out with a mobile site or begin to move your desktop site over to responsive design. It is not about how you are mobile, but about being mobile in a manner that suits you and your business.



When buying a new CMS, remember to consider how it'll fit with your overall strategy and when working with mobile it is a good idea to work in smaller iterations, understand the business opportunities and implications, and adjust as you learn.

## Content creation and multi-channel publishing

CMS, like any other technology, needs to be easy to use not just for your customers, but also for the people working with the back-end. When considering a new platform you need to consider the people who will be working with it on a day-to-day basis in order to provide users with updated content and data.

People working with enterprise systems are the same people who enjoy great experiences on their personal devices. They expect the same level of usability from their work environment that they get from their personal devices. Your CMS does not have to entertain the back-end users, but it has to enable them to get their job done effectively and independently, and give them the context that helps make the right decisions.

As customer experience management becomes essential, the systems we use to manage experiences tend to become more complex, increasing the need for user administration, workflows and easy-to-use dashboards and templates.

Most people working with updating content have many systems to use every day. If these systems are not easy to use, people simply tend to avoid them as much as possible. This is why a successful platform needs to provide experiences that don't just lead to happy front-end users but happy back-end users, too.

### Questions to consider

- How user-friendly is the dashboard?
- How easy is it to create new content?
- Can you manage the customer journey?
- How easily can the content be reused and published in multiple channels?

## Governance and reporting tools

In order to keep your content up-to-date you need a proper governance structure. Who owns the content and who is responsible for creating, updating and deleting it? And you want a CMS that makes it easy to administer and organise your governance. As stated above you want a user-friendly dashboard, part of which should be an easy way to administer users and roles. It should also be possible to create workflows.

Governance is also about ensuring that content is produced and maintain at or above a standard of quality for your organisation, which means that it can be measured. Most CMSs are provided with basic quality management tools such as spell and link checking, basic SEO and reporting. Depending on your organisation's digital maturity the tools in the CMS will be more or less sufficient. If you are already using or planning to use one of the numerous quality management

tool on the market and using Google analytics, you will want to look at how the CMS you are looking at integrates with such tools.

### Questions to consider

- How user-friendly is the dashboard?
- How seamless is the back-end user experience?
- Can you set up user administration that fits your organization?
- What kind of workflows can you set up?
- Is the CMS born with quality management and reporting tools, or does it integrate easily with third party tools?

## Part Two: Choosing the right CMS for your business

In the following we'll outline how to go about choosing the right platform for your enterprise. Choosing a system can end up being a battle between IT's technical demands and the more or less well described ideas for functionality from marketing and business units.

IT will probably be keen on finding a platform that works with the rest of their systems, and fits the skills and experience of their staff. Marketing and business on the other hand might be looking at what the competition is doing and wonder if they can copycat with success. In order to succeed you need a unified approach that aligns your efforts to choose a platform with your business goals and strategies. This is also why you need to pick a team that consists of people from business, marketing and IT. Choosing a CMS is complex because it involves many skills and processes - see Figure 1 below which illustrates the dimensions and elements of CMS selection.

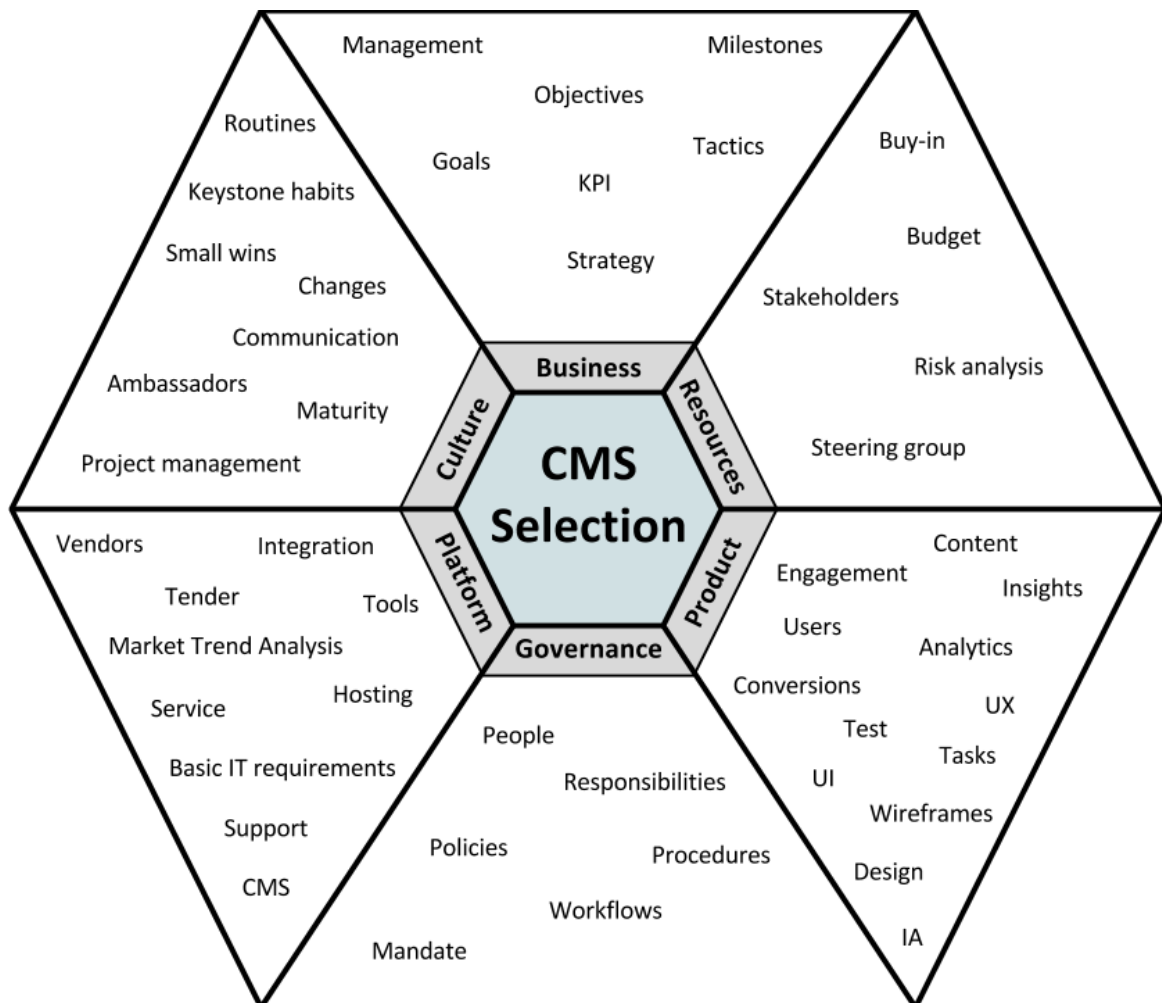


Figure 1 - CMS selection, dimensions and elements

### Business goals and strategies - the business case

Before embarking on buying a CMS, you want to get a clear idea of why you want to invest in a new platform and how it will support the direction you want to move your business in. The next step is to start developing a digital strategy that can serve as your guideline for where you want to go in the long run.

Keep in mind that digital development can be complex, and it can be tricky to prove its value. Building a business case, or perhaps more, will help you work out where you can gain the most value. For some this will mean that a responsive website is the first place to start; for others, developing a native app will be the most sensible thing to do.

The point is not that one thing is better to do than another, but rather that you need to look at your business and how you can get the most out of digital engagement with your users. Building a business case for which CMS to choose is first and foremost about looking at the problem(s) you want to solve, or help your users solve. Good user experience is often about being able to solve problems wherever they arise, whether you are on a bus, a plane or at the hairdressers.

Finally, it is worth considering whether you are doing something old in a new way, or doing something new in a new way. Put differently, are you looking to optimize well known processes or are you innovating and creating new ones? The business case should clarify your strategic platform and enable you to make a decision on how to go ahead.

#### Questions to consider

- What need(s) will your platform serve?
- Is the proportion of users large enough compared with the cost of development and maintenance?
- Can you start small and scale later?
- Did somebody already develop something, which you can build on?

#### User stories

Knowing your users, their context, their needs and problems is paramount when trying to decide what kind of solution you need. It is your users' top tasks combined with your business strategies and goals that should guide you. Whether you are working in a B2B or B2C doesn't really matter.

Often we tend to ask for demographic details when researching, which is also fine and necessary, but if you are focusing on the experience and customer journey, knowing your users' context and the touchpoints they engage with will help you determine what kind of platform you need to develop.

We all know that people only use systems or solutions that suit a need, satisfy a desire, solve a problem or help them with a task they need to do. A user story describes how one of your users - characterised using personas - benefits from using your solution.

If you are in a B2B setting and your sales people need to access your business intelligence and CRM system, as well a live update on their sales information, you might want to build a native app that supports that. You could also be in a B2B setting where all you really need is to be able

to log on to a manual or the latest news from HQ. In that case you might just want a responsive website that your users can log on rather than an app.

So asking your users and researching their context should help point towards what kind of platform you need to build. By the end of the day you need to know how your solution will make it convenient for your users to successfully engage on the device and/or channel of their choice, whenever they want.

### Questions to consider

- In what context(s) might users meet and use your solution?
- How will your solution make their your users' life easier?
- What makes users want to engage?
- What problem will you solve for your users?
- What user need(s) will you satisfy?

## Know your content

A very important aspect of creating the experiences your users expect is relevant content. Often project managers overlook the amount of time and effort required to map out existing content, create new content where necessary and implement it.

Getting to know your content requires a systematic approach, whether you are in a large and complex enterprise or a small and lean company. Inevitably, a global b2b with multiple products and markets will demand more time and focus.

One way to work with your content is to look at your customer journeys, personas and user stories. What content is necessary for your personas to fulfill their tasks? Once you have an overview of the necessary content you need to map out your existing content types, in order to get an idea of how new content will be produced.

If you want to build a solution that is personalized and which builds upon data about the user for several different systems, you need to figure out how to acquire, manage and utilise this data.

### Questions to consider

- What content do I need to produce for my target audiences?
- What content is necessary to support my customer journeys, targets and KPIs?
- Who will be producing the content?
- Who will be maintaining and updating the content?

## Organisation and governance

Before selecting a platform and starting your development project, you want to take some time consider the project organization required to allow you to make the necessary decisions during development and implementation. You will also need a governance set-up that ensures success after implementation.

As part of the project you should be thinking about resources for three phases:

1. The selection process.
2. The technical development and implementation.
3. The development and implementation of content.

Having adequate resources for the third phase is essential for your new CMS to become a success. In many enterprises it is forgotten that content creation and implementation require use of internal resources so it is advisable to point out in the beginning of your project that you will need budget/time for content.

### Questions to consider

- Who will project manage while you are developing?
- If you are the PM, what won't you be doing while you are working on this project?
- Who "owns" the CMS and will thus take responsibility for making decisions during development and after launch?
- Who owns the content and who will be responsible for creating and maintaining content?
- If your platform requires customer/user support, who will provide the human resources for this?

## Identifying and communicating requirements

There are different ways to go about describing requirements. In order to maintain focus on your goals and user needs, one way is by identifying your most important use cases, both from the perspective of your end users and from the people who will be updating data and content, or developing in the system.

Describing your requirements in use cases and stories rather than technical functionalities and specifications might meet internal resistance, but by doing it this way you'll be less at risk of losing sight of business goals and user needs and will also not risk spending so long defining what you want that your solution is obsolete once finally launched.

## Establishing resources

When getting your budget together you obviously want a sum to develop for but just as importantly, you need to look at what you will have for maintenance, development and support after implementation. You also want to look at the internal resources. If you cannot get people to maintain and support the solutions you are proposing, you might want to revisit your plans.

## The selection process

Once you have the above in place, the buying or selection of a CMS shouldn't necessarily be very difficult or time consuming.

To do:

- Write down your priorities, goals and overall requirements, preferably in the form of user stories in a short RFP.
- Make a short list of preferred vendors and invite them to answer your RFP.
- Invite 3-4 of the selected vendors to a presentation.
- Select the vendor that you think will best suit your requirements.

## Evaluating vendors and agencies

Evaluating a vendor or agency can be compared to a job interview. You'll be cooperating closely and possibly for an extended period of time. So you want to make sure that they are capable of serving your needs and that they are able to help you make the right choices. Obviously you want to look at their references and their reliability. This can be done in the very early stages of your selection. But choosing a vendor is also about chemistry, which is why a personal meeting is preferable. One-way to do this is to invite a few vendors to answer your RFP and have them present their solution personally. For you to evaluate the vendor properly it is a good idea to insist upon meeting the team you will be working with rather than just the sales people.

## Evaluating the technology

As with deciding what to develop, evaluating the technology that you might want to use is also about looking at your organization and testing out how it might work in your particular set-up. You do this by involving the people in your organization who will be working with that technology on a daily basis. They will often be the ones who can help determine if it'll work in your setting.

Will you be developing, supporting and hosting in-house? If so does your IT department have people who work with the technology that your are considering?

If you plan on leaving it up to your vendor or agency to develop, support and host, are they reliable? Do they have the sufficient staff with the necessary skills and expertise?

Of course you also want to look at the maturity of the technology you are considering. Are there still a lot of bugs and kinks to work out? Look at existing solutions. Do they work as intended? Ask your vendor to provide cases and references that are akin to the platform you want to develop.

One thing that you can do when choosing new technology for your enterprise, that might help you sleep better at night, is to hire a technical consultant who can help guide you in the selection process.

## Avoiding the big bang

While you might have all the right ideas and strategies for how you want to make the most out of your new CMS and the necessary resources to start developing the all-in-one solution, avoiding the big bang is recommended.

If you develop step by step you'll be able to release in bits and your entire project won't fall apart if some functionality is proving tricky or an integration goes wrong.

No matter what you choose, working in a more or less agile manner and sticking to your business case makes sense in an environment where you don't know for sure what is going to be on the market next year.

If you are working on becoming more customer-focused you might want to start with developing personas for the most important target audiences and create content for each persona. Secondly you can start personalizing your website step by step by looking at location, site behavior, time of day etc. Then work on implementing truly personalized content by looking at the entire customer journey and utilizing the data from your CRM and other data sources.

## Future-proofing your CMS

If you have worked with digital for a while you'll know that there really isn't such a thing as future proofing a platform completely, but you can make it more or less difficult to continuously improve.

### Questions to consider

- Is the CMS flexible enough for changes in business requirements?
- Experience management: Can you personalize and manage the digital part of the customer journey?
- Enterprise user management: Does the system provide easy user management?
- Content management: Does the system allow pushing content to multiple channels?
- Mobility: Does your CMS support and enable mobile development?
- Extendibility: Does the platform allow for deploying new functions and services without messing with the original code base?

### Other considerations:

- Standards: By using standards instead of stand-alone specially developed solutions you avoid a situation where you can only get further if you develop something new again.
- Testing: Select a CMS and set-up that allows you to test when you develop something new.



- Code management: Make sure that you can manage and get to your code—even if you switch agencies.
- Integration: Make sure that you choose a platform that allows as seamless integration with the most common business systems as possible.

### The buying process in steps

Selecting and buying a CMS for your enterprise can seem like a complex task because it requires a long list of skills and processes.

To help you plan your process we will conclude with a step-by-step guide to give you a graphical overview of the entire buying process - see Figure 2 below. The duration of each step depends on the organisation.

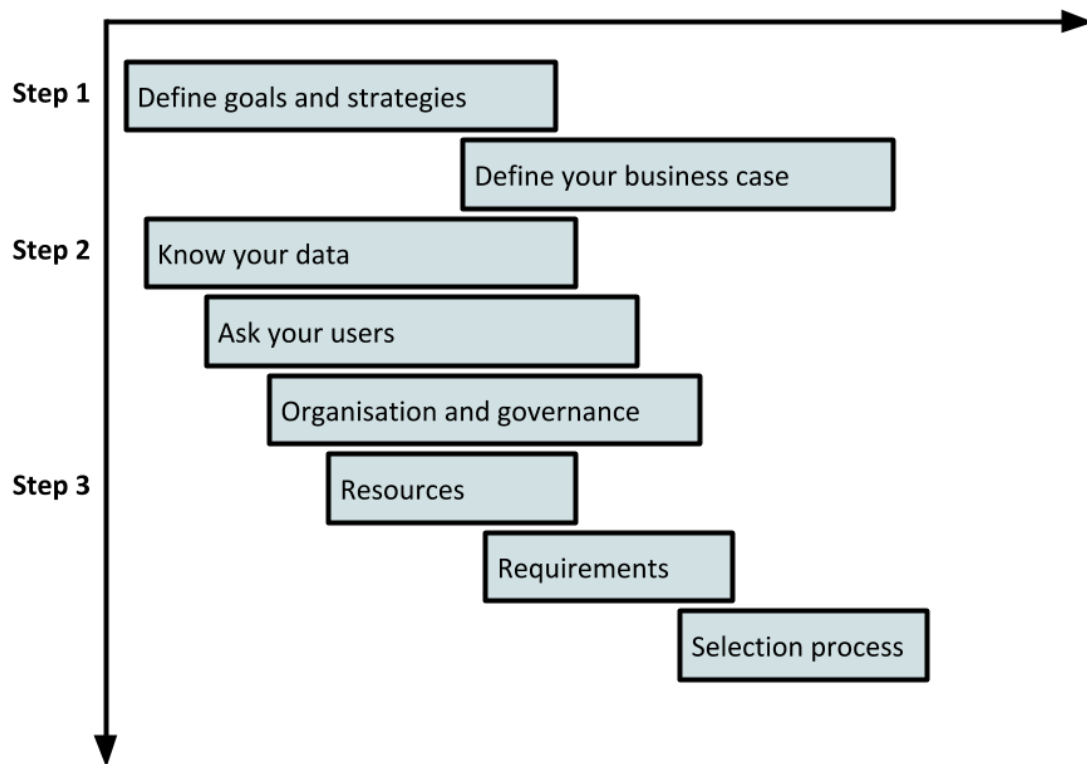


Figure 2 - The buying process

## About J. Boye

A vendor-neutral analyst firm founded in 2003, which focuses on several aspects of digital, including CMS, enterprise portals, digital workplace, strategy & governance and web project management. The company today has ~20 employees based in Belgium, Denmark, Germany, UK, and the US. With a mission to help mature a young market, our main activities are:

### Conferences

Expand your network and gain inspiration from international experts. The J. Boye conferences are held each year in Philadelphia (USA) and Aarhus (Denmark) and attract more than 300 participants for three days filled with knowledge sharing. The conferences also serve as an annual meeting for the members of our groups.

### Groups

Receive feedback to your specific challenges from people in the same position as yourself in a one of our groups. The 50+ groups are strictly confidential, consisting only of practitioners, who themselves decide whether discussions take place at a strategic, tactical, or operational level. Among the 500+ members are large, global and complex organisations from around Europe and North America.

### Research

We have done analyst work since 2006 with an initial focus on specific vendors in market segments such as web CMS, enterprise portals, enterprise social software, and SharePoint. These evaluations provide you with an overview of how specific systems match your needs and enable you to make competent decisions on strategy and investment. Later, we also started releasing best practice research, e.g., buyers' guides and papers on strategy or trends. All our research is based on interviews with users and implementation partners.

### Consulting

On a selective basis, J. Boye consults with organisations in all phases of digital projects: strategy & governance; business objectives; choice of system and implementation partner; and guiding through implementations.

Some of our recent references include: Actavis, Al Arabiya (MBC), Alfa Laval, Alma Media, Boehringer Ingelheim, Brother International, Cambridge University Hospital, Capital Region of Denmark, EUMETSAT, European Commission, GEA, International Federation of Red Cross, KAEFER Group, Lund University, Nordea, Nycomed, Red Bull, Open University, Suez, University College London, United Nations, Widex, and the World Health Organization.

## Appendix A - Questions to consider

### Part one: What to look for

#### Managing experiences:

- What does my customer journey look like and where are the digital touchpoints?
- How does the CMS support personalization?
- How does the CMS support content through multiple channels?
- How does the CMS allow me to track and report user behavior?
- How will the CMS become an asset in my overall customer experience management?

#### Extensibility and integration with key business systems:

- Is the CMS designed to integrate out of the box?
- Is it possible to integrate user data with analytics from other platforms?
- How often will I need to update and integrate with new applications?
- How often will I need to update functionalities?
- Which business systems do I need to integrate with?
- How many of my required functionalities are standard in the CMS?
- Will I have the support of in-house developers or will I need to buy outside help when integrating or developing?

#### Costs and pricing models:

- What is the total cost of ownership, including licences, support, development, hosting?
- Does the license scale with additional servers without adding extra cost?
- What is the cost of upgrades and if applicable new modules?
- What will it cost you to maintain and support your mobile endeavors?
- What kind of licensing model will fit your organization?

#### Content creation and multi-channel publishing:

- How user-friendly is the dashboard?
- How easy is it to create new content?
- Can you manage the customer journey?
- How easily can the content be reused and published in multiple channels?

#### Governance and reporting tools:

- How user-friendly is the dashboard?
- How seamless is the back-end user experience?
- Can you set up user administration that fits your organization?
- What kind of workflows can you set up?
- Is the CMS born with quality management and reporting tools, or does it integrate easily with third party tools?

## Part two: Choosing the right CMS for your business

Business goals and strategies – the business case:

- What need(s) will your platform serve?
- Is the proportion of users large enough compared with the cost of development and maintenance?
- Can you start small and scale later?
- Did somebody already develop something, which you can build on?

User stories:

- In what context(s) might users meet and use your solution?
- How will your solution make their your users' life easier?
- What makes users want to engage?
- What problem will you solve for your users?
- What user need(s) will you satisfy?

Know your content:

- What content do I need to produce for my target audiences?
- What content is necessary to support my customer journeys, targets and KPIs?
- Who will be producing the content?
- Who will be maintaining and updating the content?

Organisation and governance:

- Who will project manage while you are developing?
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