

Content Management Systems Best Practices

1. **Make sure you define the benefits and goals of implementing a Content Management System (CMS).** Using and managing a CMS will add additional overhead, including approval levels that did not exist formally before. However, you will decrease incorrect or broken code, enable easy migration of content, ensure that content is not released too early or without approval and ensure that everyone in your organization always has access to the most current content.
2. **Utilize a CMS to its full benefit.** Using CMS workflows as the only way to push product or site content to the website will make sure the proper approvals are done. Ensure that the CMS process support your internal processes – do not add unnecessary steps into the publishing process. Many headless commerce solutions partner with CMS providers – remember to check on partnerships, especially for unique integration benefits.
3. **Don't let CMS hamper your ability to address emergencies.** Workflows are great for getting the right people to approve changes when they are made. With a CMS, content can be issued, then reversed. However, when hard coding of content becomes urgent, you should have a back-up process for managerial approval and content upload.
4. **Define CMS ownership.** Implementing a CMS requires support from the entire team to design, implement, use and manage. Buy-in from all key stakeholders is needed to ensure their needs are met. Having assistance from key users in the design upfront will help ensure that the system is used consistently. Determining how to roll this system out to various groups in your company is needed to make sure that complete 'sections' of your content are in the new system; partial content in the CMS will cause confusion and greatly reduce the effectiveness of the system.
5. **Define your goals and develop a supporting business strategy.** What are your goals for implementing a CMS? You will need to define a strategy and process to use CMS to meet these goals. At a minimum, you should define approval processes and standards, what content should be maintained with each process, who does what, and you should coordinate ongoing improvement initiatives after initial implementation.
6. **Develop a content workflow to add efficiencies and control.** Content management workflows can be effectively used to control content approvals and facilitate streamlined flows to increase efficiencies.
7. **Define your CMS requirements.** Map out a complete set of CMS requirements for your specific needs. Unlike other systems, CMS systems reach many more groups within an organization; each will have their own needs. Gathering all of their requirements is critical. Start by envisioning your end goal.
8. **Create, monitor and maintain a set of standards.** Defining standards, category and information structure, naming conventions, content creation practices, etc., is usually needed for CMS implementations. Standards help keep users in sync, facilitate content reuse, improve navigation and minimize training of new users.
9. **Implement your CMS in phases.** Identify the highest priority areas for your CMS, the support needs, and rollout for the first phase in a few months. Then test your CMS operational process, and iterate the product as needed.
10. **Monitor, manage and optimize during rollout and usage.** Make sure the CMS is used, used uniformly, used according to the processes and standards, and that the processes and standards are correct. Meeting with the key stakeholders and executive management on a regular basis can help you identify changing needs and optimize the system.
11. **Define content lifecycles.** Analyze content lifecycles to determine when content can be removed and archived from the CMS. Storing old content on the system will make it more difficult for users to use the system. Ensure that content is still searchable, even though it is 'gone'.
12. **Create Performance Metrics.** The final step in using a CMS system is to prove that it is beneficial. Determining and reporting against performance metrics will help maintain the business case for using a CMS. Seeing performance improvements, cost reductions and reduced content issues will help uncertain stakeholders see the benefits of a CMS.

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eCommerce Diligence™ Checklist

CMS Key Questions to Ask Providers

Company

1. How long have you been in this business?
2. How many customers have you sold? How many have left your service, and why?
3. What size or types of clients fall into your “sweet spot”? Won any awards in that space?
4. What other services do you offer?

Products/Services

1. Is your solution offered as perpetual licensed software or on-demand solution?
If perpetual license:
 - a. What are the hosting requirements?
 - b. What should I expect regarding upgrades (both timing and pain)?
 - c. Do you provide customization /implementation services?
 - d. Can outside third parties provide customization/implementation?**If SAAS/ASP:**
 - a. Do all tiers include maintenance and support?
 - b. How often are new features introduced?
 - c. What do I do if I need a feature you don't have or plan to have soon?
 - d. What security do you provide against external intrusion and malicious manipulation?
2. What optional services do you provide as part of your solution?
3. What ROI should I expect from implementing your solution?
4. What type of training do you provide to use your solution?
5. What skills does my organization (or hired third party) need to implement this platform?
6. What technical support services are available? What is your SLA for support issues?
7. Do you have a support knowledgebase, community forum, or applications that are shared by customers?
8. Which third party product and ecommerce platform providers have you worked with in the past?
9. How can I export if I need to change platforms?
10. How do I ensure I own and control my content?

Features

1. Which types of assets can your system manage?
2. Can you manage catalog data in other applications like ecommerce or Social Media apps?
3. Please describe your content approval process.
 - a. How many levels of approval are possible?
 - b. Can different approvers to approve different sections of the same content?
 - c. Do you have organizational hierarchy in the approval chain? In other words, can a manager overrule and/or approve subordinates' approvals?
 - d. How does your system migrate content from one server to another?
4. Do you provide version control?
 - a. Can a set of files be part of a unique build?
 - b. Can your system identify changes to the individual files/visually compare?
5. Can a build be rolled back? Can an individual asset be rolled back?
5. Please describe your content editing tools for all the types of content your system can manage?
6. Please describe how you can search for content and navigate through content using your tools.
7. Please describe your reporting capabilities (real-time, batch, ad hoc, etc.).
 - a. What features can you report against?
 - b. Please provide a list of standard reports.
 - c. Is it web-based, application-based, other?
8. For which applications, ecommerce, web servers, etc., do you have standard integrations available?
 - a. Which ones have you integrated with on a custom basis?

Pricing

1. Please describe your pricing model.
 - a. Are there different levels?
 - b. Why do I want to pay to upgrade to the next level?
2. How do you charge for annual support? What about maintenance?
3. Are there any additional fees (e.g., implementation, transaction costs, revenue sharing)?

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