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white paper

How to Choose the Best Web Content Management System for Customer Experience Management:

A Guide for Both Marketers and Developers

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Choosing a Web CMS is about more than Content Management

We've come a long way since the days when a content management system (CMS) was simply a way to manage and update the content on your website. Today, a web CMS is just one type of technology you need to consistently deliver an excellent customer experience. While your web CMS is a crucial component, today you must look at it as part of a larger customer experience management capability.

Why the shift? It all starts with the connected, empowered customer who brings greater expectations and preferences about how and when he or she wishes to engage with a brand. Today's customers expect a seamless, multichannel experience that anticipates their needs and wants. Companies that deliver this type of experience are building trust and loyalty that result in top- and bottom-line improvements including: greater return on marketing investment, increased conversions, higher revenues, and greater lifetime customer value.

To achieve these business outcomes, companies are embracing the discipline of customer experience management and investing in the technology that enables it. A customer experience management platform lets you drive consistency in the experiences that your customers have with your brand. And that's where a web CMS comes in. A web CMS helps you achieve that consistency and deliver great web experiences. The rest of the customer experience management solution helps you deliver that content and consistency in other channels such as email and social.

Because your web CMS must interoperate seamlessly with the components of customer experience management, the CMS decision shouldn't be made in a vacuum. This paper highlights the criteria – both from the marketers' and the IT/developers' perspective – that today's organizations should consider when selecting a new web CMS as part of a broader customer experience management strategy.

> *" It is time to start thinking about WCM [web content management] beyond just managing content or siloed websites or experiences. Instead, we need to think of how WCM will interact and integrate with other solutions – like search, recommendations, eCommerce, and analytics – in the customer experience management (CXM) ecosystem in order to enable businesses to manage experiences across customer touchpoints."*
>
> — Stephen Powers, Forrester

1. "The Emergence of CXM Solutions, and Why the Term 'WCM' Lives On," Stephen Powers, Forrester, August 18, 2011

The New Requirements for Today's Web CMS

One of the hallmarks of customer experience management is delivering a consistent experience across all touch points. That's difficult to achieve if your content management capabilities are isolated in a siloed system. Instead, your web CMS needs to integrate and interoperate as part of a centralized platform for customer experience management.

A customer experience management platform unifies channels, campaigns, visitor information, and performance measurement into one integrated marketing toolset. The web CMS serves as the core of the platform, enabling you to create, manage, and deliver the most relevant content for each interaction based on centralized customer intelligence. And because of this prominent role in delivering and managing an excellent multichannel customer experience, your web CMS must be much more robust, scalable, and flexible than ever before.

It's also important to ensure your web CMS can seamlessly integrate with core systems such as your customer relationship management (CRM) software, ad-serving software, video streaming application, and any other system that would benefit from sharing customer data across the enterprise. Centralizing and sharing customer data enables sophisticated personalization and targeting to deliver a more tailored, relevant experience, which improves customer engagement.

Now that we've set the context for the importance of the web CMS for customer experience management, let's take a closer look at the requirements you'll want to consider when choosing the best web CMS for your organization.

> *"... WCM products have to work with a wider range of systems — analytic applications, e-commerce platforms, database management systems and so on. As a result of these trends, many IT leaders have to upgrade or replace older WCM systems with new technology that can handle more complex and critical tasks."*
>
> – "Magic Quadrant for Web Content Management," Gartner, September 6, 2012

From the Marketer's Perspective: Important Capabilities for Your Web CMS



Today's marketers require a web CMS which offers far more than simply managing content. Ensuring an excellent customer experience calls for a set of capabilities that range from enabling you to deliver powerful interactive features to engage customers on your website, to collecting and utilizing customer behavior for personalized interactions, to displaying content optimized for mobile devices.

The following criteria take these and other requirements into consideration and can be used as a starting point for the marketing team's evaluation of a potential new web CMS:

- **Easy-to-use interface:** This remains a must-have for any web CMS. An intuitive, easy-to-use interface enables both marketers and content editors to add and edit online content quickly without having to know HTML. Casual users should be able to complete routine workflow tasks quickly and easily, while power users can utilize a more robust interface and set of functionality.

- **Single view of the customer:** Look for a web CMS that collects and utilizes visitor information to personalize the experience. The web CMS should capture information and insights about customers and prospects and combine this information with customer intelligence from other systems such as your customer relationship management (CRM) system for a single, comprehensive view of the customer.

- **Email and automation:** The web CMS should integrate email campaign management, testing, and optimization to maximize campaign and site performance, drive higher conversion rates, and improve marketing return on investment. Look for marketing automation capabilities that help you eliminate repetitive tasks and streamline your marketing efforts around everything from email campaigns to landing pages, lead scoring, segmentation and profiling, and testing and optimization.

- **Real-time personalization and targeting**: With a single view of the customer, your web CMS should be able to automatically sense and adapt to customer behavior to offer the most relevant content and interactions. Look for features such as native content profiling to help capture insight into customer needs and interests.

- **Search engine optimization (SEO):** The web CMS should integrate SEO with the publishing process so that keyword-rich content and metadata, search-friendly URLs, and other SEO tactics are consistently and automatically implemented.

- **Multilingual support and translation:** If your organization has or will have international sites, multilingual and translation support should be on your requirements list. The web CMS should natively support content and websites in multiple languages as well as provide content editing tools that "speak" the major global languages your local, in-country marketing teams use. Also look for a web CMS that easily integrates with professional translation services to streamline the process of translating and publishing multilingual content.

- **Social media support:** Any web CMS you choose should include a strong social media component, enabling you to easily create branded communities as well as deliver a seamless experience with third-party social networks. The right CMS should make it easy to establish—and maintain—a dialogue with your customers through blogs, forums, polls, and integration with social media sites such as Facebook and Twitter.

- **Mobile device support:** Your web CMS should serve up a consistent, compelling experience on virtually any device. Look for a solution that automatically detects the visitor's device type and optimizes the content for the specific device without having to re-render the site for each variation.

- **Multichannel support:** Insist on a web CMS that delivers multichannel support and integration including web, mobile, email, and social. The right CMS should enable you to view all your channels as a single experience and a seamless conversation with the customer, letting you orchestrate, monitor, and measure customer interactions across channels.

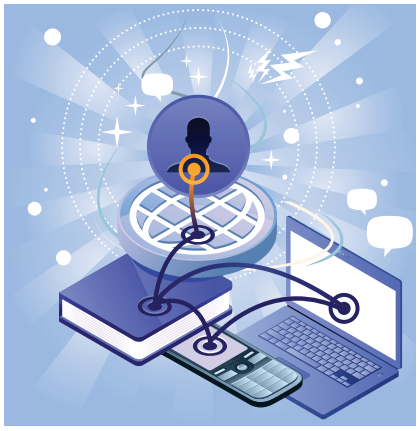
- **Flexibility to connect with other business applications:** Insist on the ability to easily integrate any and all of your line-of-business applications such as customer databases and CRM and ERP systems. Look for prebuilt integration with leading enterprise software packages. You should also look for the ability to connect to databases and web services without complex programming.

- **Adaptive to future experience and site design improvements:** Pick a web CMS that allows you to change design and experience elements without IT effort. You'll want to be able to update page layouts, add pages, and alter designs all without coding.

Think Beyond Today

When you create your list of required capabilities, be sure to consider what your organization's needs might be in the longer term. For instance, is your company planning to expand to new regions in the next few years? That could mean multisite and multilingual capabilities suddenly become must-haves. Or maybe you're predicting explosive growth in e-commerce and need to ensure your solution can rapidly scale. The point is to keep future requirements in mind as well as you're going through the evaluation process.

From the Developer's Perspective: Important Capabilities for Your Web CMS



While marketing decision makers are focused on the CMS capabilities that help optimize the customer experience, developers and IT decision makers should evaluate solutions based on the underlying infrastructure, development tools, and other features and capabilities that ensure performance, flexibility, scalability and ease of use for developers.

Here's a checklist of critical aspects for developers and IT to consider when evaluating a new web CMS:

- **Developer productivity:** Look for a CMS that streamlines development and maintenance with easy-to-use tools, controls, and capabilities. Your web CMS should enable you to work with the tools you're already familiar with, such as Microsoft Visual Studio, to make the best use of existing skills.

- **Roles and administration:** A good web CMS will provide a sophisticated permission management system that allows you to grant rights to users, groups, and roles for ease of administration and control.

- **Integration:** Look for a solution that includes pre-built integration with leading enterprise software, including the ability to connect to databases and web services without complex programming.

- **Design flexibility/customization:** The web CMS should be flexible and easily customizable, with tools that let designers create and update site experiences without coding.

- **Security:** In addition to a permission management system for granting rights to users, groups, and roles, your web CMS should also support external authentication and authorization systems like Active Directory without requiring extensive coding and integration efforts.

- **Scalability and performance:** It's essential to understand the performance and scalability implications of any web CMS you're considering. To keep maintenance and ownership costs low, choose a solution that will let you deploy multiple websites on a single system. And for greater scalability, choose a web CMS that can leverage the cloud infrastructure to rapidly deploy and scale servers to handle increased website traffic and enter new markets—without requiring additional investments in hardware.

- **Support for responsive design and mobile devices:** Look for native support for multi-device output, with features such as device previews to enable optimization of content, site layouts, and renderings. The web CMS should automatically detect the visitor's device type and serve optimized content for that device.

- **Multisite and multilingual support:** Select a web CMS that supports any number of domains mapping to different web properties, as well as flexible sharing of content and code between sites. Ensure that the solution enables many-to-many language support to avoid creation of extensive new data structures when supporting different languages.

- **Technical support and training:** Evaluate the breadth and depth of the vendor's support and training offerings to make sure they deliver the level of support and education your organization has come to expect.

Be on the Lookout for Bloated Solutions

In selecting a web CMS as part of a customer experience management solution, avoid choosing a CMS that includes loads of features your organization may never use. In other words, look for the "best of need" solution with everything that you do need and very little of what you don't need. This will help keep the complexity down, while ensuring the solution you do pick is best suited to your requirements.

A Roadmap for Choosing Your CMS

Once you have your own list of important marketing and technical capabilities for a new web CMS, then you can create a short list of potential solutions that meet your needs. Once you have a short list, you'll need to put one or more web CMSs to the test to see which one bests suits your organization's needs.

The following best practices provide some guidance on how to gather hands-on experience, third-party objective information, and product know-how to inform your decision. Think of it as a roadmap for choosing your new web CMS:

1. **Bring marketing and IT together:** The entire team, including marketing, content editors, developers, and designers should participate in comprehensive demonstrations. While the initial meeting includes the entire team, allow different groups ample time to have their own sessions with the CMS vendor where they can ask questions, at their level, that address their business or technical requirements.

2. **Try it before you buy it:** Request that the CMS vendor install a clean/out-of-the-box version of its product for your development team. Demo systems are highly configured and don't necessarily give you a clear view of the complexity of the product. With a clean installation, your organization can see how easy or difficult it is to get started.

3. **See it in action:** Ask the web CMS vendor to build a simple website from scratch for your development team. This will reveal what functionality ships with the product, as distinct from customizations that may have been included in the demo system.

4. **Attend vendor training:** Strongly consider sending your developers to the web CMS vendor's technical training class. They will gain a clearer perspective of the product's capabilities and shortcomings, potentially saving your organization significant time and money in the long run.

5. **Tap the developer community:** Determine if there is a vibrant developer community around the CMS you're considering and then tap into it for further insight into the product.

6. **Talk to other customers:** Ask the vendor for references of customers in your industry. Speak with those customers to gain insight into real-life experiences with the product.

Finally, if your budget allows, or if you already retain their services in your organization, ask an analyst with a leading firm such as Gartner or Forrester to provide insight into web CMS vendors. As renowned advisory services for technology and its implementation, these firms can help you understand which solutions are appropriate for your business requirements.

More Resources

Marketing Gold:
http://www.sitecore.net/Resources/whitepapers/Marketing-Gold-Connecting-Integrated-Multichannel-Marketing.aspx

Success Factors for Marketers:
http://www.sitecore.net/Resources/whitepapers/7-Success-Factors-CXM-for-Marketers.aspx

Success Factors for Developers:
http://www.sitecore.net/Resources/whitepapers/6-Strategies-for-CMS-DM-Success-Dev-Perspective.aspx

Success Factors for IT:
http://www.sitecore.net/Resources/whitepapers/5-Factors-for-IT-for-CMS-Selection.aspx

About Sitecore

Sitecore is a global software company that creates products to deliver the most relevant experience and content to customers at any moment of interaction and via any communications channel – the web, email, mobile, social and offline. Our customer experience management platform combines proven web content management with customer intelligence to create a single view of a customer that drives meaningful interactions, increases conversions and builds lifetime customers. Global brands, including American Express, Carnival Cruise Lines, easyJet, Heineken, LEGO, Microsoft, and Nestle rely on Sitecore to get and keep loyal customers who engage more and drive revenue growth..

For more information about Sitecore, visit www.sitecore.net.