

# HOW TO CHOOSE YOUR WCMS



A **QUICK START GUIDE** to help you choose from the bewildering amount of **Website Content Management Systems (WCMS)**



## ASSESS YOUR NEEDS



Resist the temptation to start by looking at WCMSs and their features. This will lead you to unnecessary features and functionality



Your WCMS aims should be defined before looking at WCMS options to know what features are required



Start by talking to your marketing and IT departments to identify what limitations and preferences exist in your organisation. If possible, talk to someone who has already been through the WCMS selection process



The WCMS is just the interface that manages your content.  
**IT IS YOUR CONTENT THAT IS MOST IMPORTANT**



WCMS decisions are sometimes solely deferred to the technology team, marketing department or managers, but other stakeholders should be involved to ensure it addresses all the business and user needs



Create a stakeholder and content contributor list and involve them in the project, e.g.:

- Managers
- IT
- Marketing
- Editors
- Site planners
- Developers
- Administrators
- Approvers
- Designers
- Trainers
- IT support
- Site users
- Etc.



Since your content contributors will have the biggest impact on the success or failure of your WCMS, you should involve them in the selection process



Define your requirements in a Functional Specification document

Create a comprehensive list of business and technical needs that the selected WCMS will fulfil.

You should prioritise your requirements.

- Set the aims, objectives and deliverables
- Identify and consider current and future needs
- Identify any integration requirements with other systems
- Determine your technical and server requirements / limitations
- Define measurement criteria
- Identify all user types required
- Define your required workflow
- Analyse your content needs and determine how it is best structured
- Decide on the necessary features and functionality
- Identify maintenance requirements and a publication policy
- Consider implementation needs and data migration options



# COMPARE WCMS

With your functional specification and list of needs in hand, you can begin to evaluate the different WCMS.

Consider 'fitness for purpose'. Identify what is right for YOU



Use the Web, books, white papers etc. to find out as much as you can about WCMS and the options available. Remember that websites can be biased towards particular platforms

Create a search string (for Google and databases) using alternate words, Boolean logic and parenthesis that returns highly relevant links meeting all your needs, e.g. to search for a CMS used in higher education you could use: ("content management system\*" OR cms\* OR wcms\*) AND web AND (universit\* OR facult\* OR school\* OR institution\* OR academic OR hei\*)



Identify the big players by analysing the current market share with resources like: <https://websitesetup.org/popular-cms> Remember that popularity alone is no guarantee of quality and the most popular WCMS is not necessarily the platform to match your needs



## Comparison Matrix

Narrow your search down to 3 platforms and spend time comparing them. Create a feature comparison matrix for functionality that is important to you, e.g:

	Drupal	Joomla!	WordPress
<b>FEATURE</b>			
Ease of use	3	2	4
Notes	WordPress is generally considered to be the easiest to use by most authors. The navigation is well categorised and simple to operate		
Plug ins and extensibility	4	3	5
Notes	This comparison is based solely on the number of plugins available and the assumption that more choice is likely to result in a plugin that meets a user's requirements		
Customisation and upgrades	3	4	5
Notes	WordPress is the most easily customised and updated and requires the least technical skill to maintain the platform		
Community Support	2	2	3
Notes	Support is not guaranteed for any open source platform. WordPress has the largest community and provides a wealth of support materials to help administrators and users		



## Resources

### Recommended books

- Web Content Management, Systems, Features and Best Practices by Dean Barker
- Choosing an Open Source CMS: Beginner's Guide by Nirav Mehta

### Compare market share

- <https://websitesetup.org/popular-cms>

### Compare ratings and reviews

- <https://www.capterra.com/content-management-software>

### Identify features

- <http://www.cmsmatrix.org/matrix/cms-matrix>  
The CMSmatrix is useful for identifying whether a particular feature is present or not. However, the existence of a particular feature is too simplistic to base decisions on. Components may not be equally well implemented

### Test features

- <https://www.opensourcecms.com/>  
Test platforms without the need to install them and set them up yourself



## Have a play

Pick your preferred 2 or 3 platforms and recreate a few pages from your website in a sandbox environment or using <https://www.opensourcecms.com>. You can then evaluate the system(s) better

- Set WCMS tasks to be completed
- Subject the platform to a variety of tasks
- Build pages to check efficacy
- Set up workflows for users
- Get users to experiment and feedback their opinions



Letting the users evaluate and compare the system(s) will provide invaluable feedback

## STARTER QUESTIONS TO CONSIDER...

This list is not exhaustive. It is intended to start you thinking about your needs



### General questions

- What features can you imagine your WCMS needing now and in the future?
- What is the cost?
- Can the core code be modified?
- Can the WCMS manage multiple sites?
- What other channels must your content be distributed to?
- What is your mobile plan? Can the WCMS deal with that?
- Does the WCMS support high-fidelity presentation?
- What is your measurement criteria?
- How usable is the interface?
- Can the interface be customised?
- What are the interesting or high-profile examples of that WCMS?
- Who is going to implement and work on the WCMS?
- How easy is it to build a website?
- How easy is it to edit content?
- How extensible / customisable is the WCMS?
- How much specialisation is required to master the WCMS?
- How easy will it be to migrate content in/out
- How often is the WCMS updated?

### IT

- Is integration with other systems required?
- Where will the WCMS reside / be hosted? (Inside the organisation or hosted externally)
- What technologies (programming language, database etc.) does the WCMS require and can you provide them?
- Are there platform limitations to abide by?

### Workflow and permissions

- Can the WCMS handle permission levels that match your business structure?
- Who should have permission to access the content?
- What levels of permission can be granted?
- How are roles and permissions implemented?
- What is the process for content approvals?
- Does the WCMS support specific workflows?
- Can you keep tabs on WCMS activity?
- What level of collaboration is required? E.g. assign tasks, leave notes, group chats etc.

### Help and support

- What help is available?
- Is paid support available?
- What is the documentation like?
- Is the community around the WCMS important?
- How big / active is the support and developer community?

### Themes and plugins

- Can the WCMS be expanded using plugins?
- Are themes available to quickly restyle the presentation of the website?
- How many themes and plugins are available?
- Who decides what new functionality is required?
- Who can install and activate new plugins and themes?

### Content

- Is content scheduling and expiration required?
- Can content be rolled back to previous versions?
- Is validation of content required?
- Can content be broken down into reusable chunks?
- Is versioning required?
- Is a bulk upload utility available?
- How often will content need to be modified?
- Is it easy to add content files? E.g. Word, Excel, PDF
- Does the content need to be localised (available in several languages)
- What are the URL requirements?
- How does the platform manage media files?
- Can content be properly previewed prior to publication?
- Can content be previewed in multiple channels?
- How accessible will the content be for screen readers etc.?

### Maintenance and security

- What is the upgrade process like?
- Who will update the site with patches and updates?
- How often will the WCMS be updated?
- How often will there be backups of files and the database?
- Do you have an emergency procedure for if the WCMS fails?
- How good is the platform's security?