

Buyer's Guide to Content Management Systems

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The mistake...

Starting with a demo.

"Demos are a guided
tour through the mine
field of a product's
defects."



The steps in choosing a CMS

- End user analysis
- Internal user analysis
- Develop detailed business and technical requirements
- Send the requirements as an RFI (Request for Information) to vendors
- Select a few promising vendors
- View a demo

The steps in choosing a CMS

- Select one or two vendors for a proof of concept
- Select a vendor

Gather information

- Identify stakeholders
- Interviews
- Focus Groups
- Requirements Workshops



End user analysis

- What information do your customers use?
- How will you deliver your information?
- What are the problems areas?
- What information do end users have difficulty with?



Internal user analysis



- How is information currently authored?
- What is the process?
- What other departments use your information?
- Whose information do you use?
- What are the bottlenecks and problem areas?

Stumbling block

At this point, you will most likely find that there are business processes and inefficiencies that will be a stumbling block to progress.



Develop Requirements

- Organizational goals
- Vision of the user (internal and external) experience
- Repository
- Linking
- Workflow
- Authoring

Develop Requirements

- Information Delivery
- Usability
- Globalization and translation
- Integration
- Licensing

Send out an RFI

- Send out your requirements as an RFI rather than a RFP (Request for Proposal)
 - You will get rigid responses with an RFP
 - RFIs let the vendors innovate
- How would vendors support your business and technical requirements?
- What are the estimated costs?

Scope of RFI

- Define your pilot project and the requirements necessary for the proof of concept
- Indicate what requirements are necessary for the roll-out
- Define the expertise that will be needed (for example, integration)

Scope of RFI

- Be clear on what work has already be done and what needs to be done
- Have vendors indicate what requirements can be fulfilled out-of-the-box and what will need customization
- Have vendors describe the products (including add-ons) they are recommending

The Perils of Customization

- Anything is possible with customization
- But who will update those customizations?
- Stick to out -of-the-box functionality as much as possible if you don't have programming resources



Authoring tools

- Arbortext Epic
 - SGML history
 - FOSIs
- FrameMaker 7
 - Tech writing history
 - EDDs
- Corel Xmetal
 - Web developer history
 - CSS



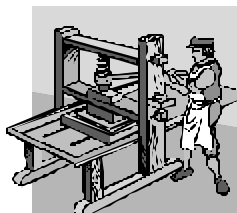
Repository tools



- XyEnterprise Content@
 - Mid range
- Vasont
 - Mid range
- X.Systems
 - Mid range
- Documentum
 - High end

Publishing tools

- XyEnterprise XPP
 - Used by high-end magazine publishers
 - HTML, PDF, Postscript
- Arbortext E3
 - Dynamic content
 - HTML, PDF, Wireless, Postscript



Select vendors for an RFI

- How long have they been in business?
- What is the company's main focus?
- What industry does the company typically serve?
- How complete of a solution do they offer?
- How long does the system take to implement?
- How is licensing handled?

Select vendors for an RFI

- What is the product release schedule?
- How are enhancement requests and bug reports handled?
- What is the company's software development methodology?
- What is the product roadmap? Where is the product going?

Evaluation Techniques

- Meet to discuss how to evaluate the responses
- A Decision (or Pugh) Matrix
 - List all requirements
 - Assess each vendor's response and mark each requirement as being met out-of-the-box or as a customization

Evaluating costs

- Keep in mind customization can cost 2-3 times more than the cost of the product
- The amount of training necessary will depend on how usable the product is
- Support costs
- Maintenance costs
- Migration costs
- Exit costs

Select vendors for a demo

- Are the costs in line with your budget?
- How innovative were the responses?
- Did the vendor address the more important requirements?
- Did you feel they answered all your questions honestly?

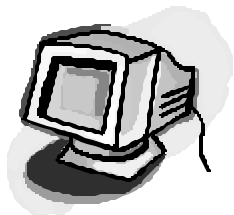


Demos

- Define clearly what you want included in the demo
- Define what requirements need to be demonstrated
- Have vendors use your content if possible to demonstrate the requirements

Demos

- Keep in mind that demos will not highlight any product inadequacies
- Ask any lingering questions
- Pay close attention to the usability of the interface



Proof of concept



- Install the software on your hardware
- Be prepared to pay for vendors' time, but not the software
- Set clear acceptance criteria
- Test your use cases to assess functionality and usability

Assess your success



- Compare your pre-content management metrics to that in your proof of concept
- Have you saved time or money?
- What did not work?
- Redesign for implementation

Good luck!

“They always say time changes things, but you actually have to change them yourself.”

Andy Warhol



Additional Resources

- *Managing Software Requirements: A Unified Approach* by Leffingwell and Widrig
- Comtech Services, Inc.
www.comtech-serv.com
 - Content Management eNewsletter (free)
 - Best Practices eNewsletter (free)

Business Card

- If you give me your business card, I will make sure that you are added to the Content Management eNewsletter list.
