



CMS Analysis and Findings

Prepared for: CLIENT

Prepared by: Amy Webb, Principal

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Executive Summary

CLIENT hopes to redesign its website to increase functionality, streamline internal workflow, add features, increase traffic and better the visibility of the ORGANIZATION and its various projects. Part of the redesign process includes making an early decision about a content management system, which is the technology used to build, aggregate and archive content on the site. This report is the culmination of several weeks of research and phone conferences to determine which CMS solutions would be best suited for CLIENT.

We have written this report in five broad sections, which include an explanation of content management systems in general, our methodology for evaluating CMS providers, our assessment of three systems, our findings and recommendations, and finally some next steps which CLIENT needs to complete as soon as it is able.

Based on our research and analysis of seven potential content management system providers, we narrowed the field down to three. Of those three, we recommend that CLIENT proceeds with either CMS #1 or CMS #2. Each system carries an equal amount of risk and benefit, and for that reason we have provided a detailed analysis towards the end of this report to help you make an informed decision.



Section One: Understanding Content Management Systems

A CMS is an automated series of tools and commands that supports the creation, management, distribution and storage of digital information. In one place, you can create original content, edit and proof it, publish it to the Internet and other outlets and archive it for later use. And you can typically accomplish all of this with a series of simple clicks of a mouse.

There are differences in the available digital content management tools. For example, a digital asset management (DAM) system differs from a content management system in many ways. A DAM easily allows an organization to categorize, re-purpose and retrieve large amounts of digital content that is not necessarily changed or updated frequently.

For most organizations that produce new content regularly, and for CLIENT in particular, a CMS is the best solution.

Many Web sites use a CMS today, but that wasn't always the case.....

FAQ

Q: Will using a CMS help us gain visibility on the Web? (You may otherwise know this as "Search Engine Optimization," or SEO.)

A: Not necessarily. You'll still need to adopt some SEO best practices.....

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Section Two: How Content Management Systems Work

Producing content for the Web, at least in terms of technology, usually entails four stages: content creation, content management, publishing and archiving.

Content Creation – Most CMS products are Web-based. To access the CMS, a user goes online and logs in to an entry screen that may look like a friendly, easy-to-use database. This database represents.....

In the best case, users are.....

Content Management – After content has been created, it is critical that others can also access and manipulate the material. Depending on the system, that content may be labeled as a story page, a content page, a “detail” page, a story, a digital asset, etc.

It is vitally important that the storage features of the CMS complement your organizational structure. For instance, you may need to know about and have access to.....

Publishing

After all pages have been created and edited to satisfaction, they need to be brought out of the storage area and published to the Web. Some content management systems accomplish this automatically, while other CMS vendors rely on third-party syncing applications to make your changes visible on the Internet.....

Archiving

One of the most important features of a CMS solution is the automated archiving process. After a page has been published, it should be stored in a central repository for later access.....



Not all content management systems are created the same way. But at the core, a CMS is a simple user interface for a very complicated database. It may not matter whether you know a database language (such as SQL – pronounced “sequel” or PHP) if you plan to outsource the technical development and maintenance.....

Another thing to consider is whether the CMS you choose will integrate with other platforms and systems that.....

The best content management systems will always be those that allow the maximum number of programming languages and.....

In addition, social networking tools have become popular, and not all content management systems have upgraded to allow their integration.....

Another emerging trend is mobile communication. It would be wise to consider making your content as platform-agnostic as possible and to target it for.....



Section Three: Evaluating CMS Options

It was important for us to assess the ability and motivation of your staff before selecting a CMS product. While a particular CMS may seem easy to use on the front end, making structural changes to your site – even adding something as simple as a widget or permanent hyperlink – can result in an insurmountable hurdle on the back end.

During the past few weeks, we have conducted phone interviews, surveys and other research to evaluate current CLIENT staff and its needs, as well as the realities of the CLIENT'S IT infrastructure, regulations and support.

24 key findings about CLIENT:

- Current staff is highly motivated to learn and try new tools, systems.....
-
-



A. Technical Limitations

CLIENT faces the same challenges and opportunities as many organizations working within a ORGANIZATION system.

Opportunities include:

- Access to on-site help and training
- Fully-supported hardware: servers are monitored, maintained and fixed when necessary
- A local community of other users who can help to solve problems and answer questions.....

Challenges include:

- Limitations on all third-party tools and systems; in some cases, an approval process makes these tools acceptable, while in other cases they are completely banned
- Restrictions on which e-commerce systems can be used; in some cases, payments must be processed through the ORGANIZATION's main payment portal
- Restrictions on what content is and is not.....

While CLIENT has done a tremendous job in launching CLIENT.COM, we worry that an CLIENT 2.0 site may require more in-house technical ability than is available based on our assessment of current staff. This can be overcome with dedicated training and time to practice and implement CMS functions, regardless of the CMS solution chosen by CLIENT. **We strongly recommend that all key staff receive thorough training on the CMS that is chosen.**

Training should include:

- An overview of using the system
- Creating, augmenting, deleting and archiving all forms of content
- Adding new modular.....



Additionally, **we strongly recommend that key Web staff receive advanced training** on:

- Stylesheets (look and feel of site)
- Themes and/or.....

In our experience, excellent CMS training programs with the best outcomes for staff typically last.....

Most CMS vendors no longer provide documentation. We therefore strongly recommend that CLIENT.....

B. Ease of Use

A complicated CMS may produce a beautiful site, but it will not motivate staff to continue to build and expand content areas. For that reason, we have evaluated possible CMS providers, to some extent, based on ease of use. Our findings are listed in the assessment below.

C. Cost-Benefit Analysis

There are numerous content management system solutions, and each has an associated cost. Even open-source systems, though they do not require a licensing fee, do still need to sit on a server somewhere, either one that has been purchased by your company or one that you are renting from another party.

Mid-range content management systems can cost upwards.....

Before making a final decision on the CMS options we have listed later in this report, it is imperative that CLIENT determines a realistic budget.....



What To Expect: Upfront Costs

Even before you've installed a CMS, you may have to spend a considerable amount. Here are some of the costs you should consider and budget for as needed:

- Redesign costs
- Content migration costs: Some CMS providers.....

What To Expect: Hidden Costs

There may be many hidden costs associated with your CMS choice. Here are some of the possible unexpected costs you should think about:

- If I decide to change part of my initial build-out design during the process, will my company be charged?
- Is my CMS provider charging me to host.....



COST-BENEFIT ANALYSIS

We offer the following chart and formulas to help you determine your likely CMS budget.

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IMPORTANT! Please note that any design costs are not included in the charts above. The charts are only intended to help you complete a cost-benefit analysis for a content management system, and not the full design and implementation of your site.



Section Four: Assessment

We considered the following seven content management systems when researching possibilities for CLIENT.

CMS #1.....

CMS #2.....

CMS #3.....

CMS #4.....

CMS #5.....

CMS #6.....

CMS #7.....

These systems were initially evaluated on the basis of the following criteria:

- Ease of use for current CLIENT staff
- Frequency of CLIENT publication
- Amount of CLIENT content
- ORGANIZATION restrictions (hardware, software, scripts, e-commerce, security)
- Extensibility.....



Based on our first pass, we eliminated the following vendors because they either did not meet CLIENT's list of specifications/ features or because we determined that they would eventually not meet all of CLIENT's future needs:

- CMS #4
- CMS #5
- CMS #6
- CMS #7

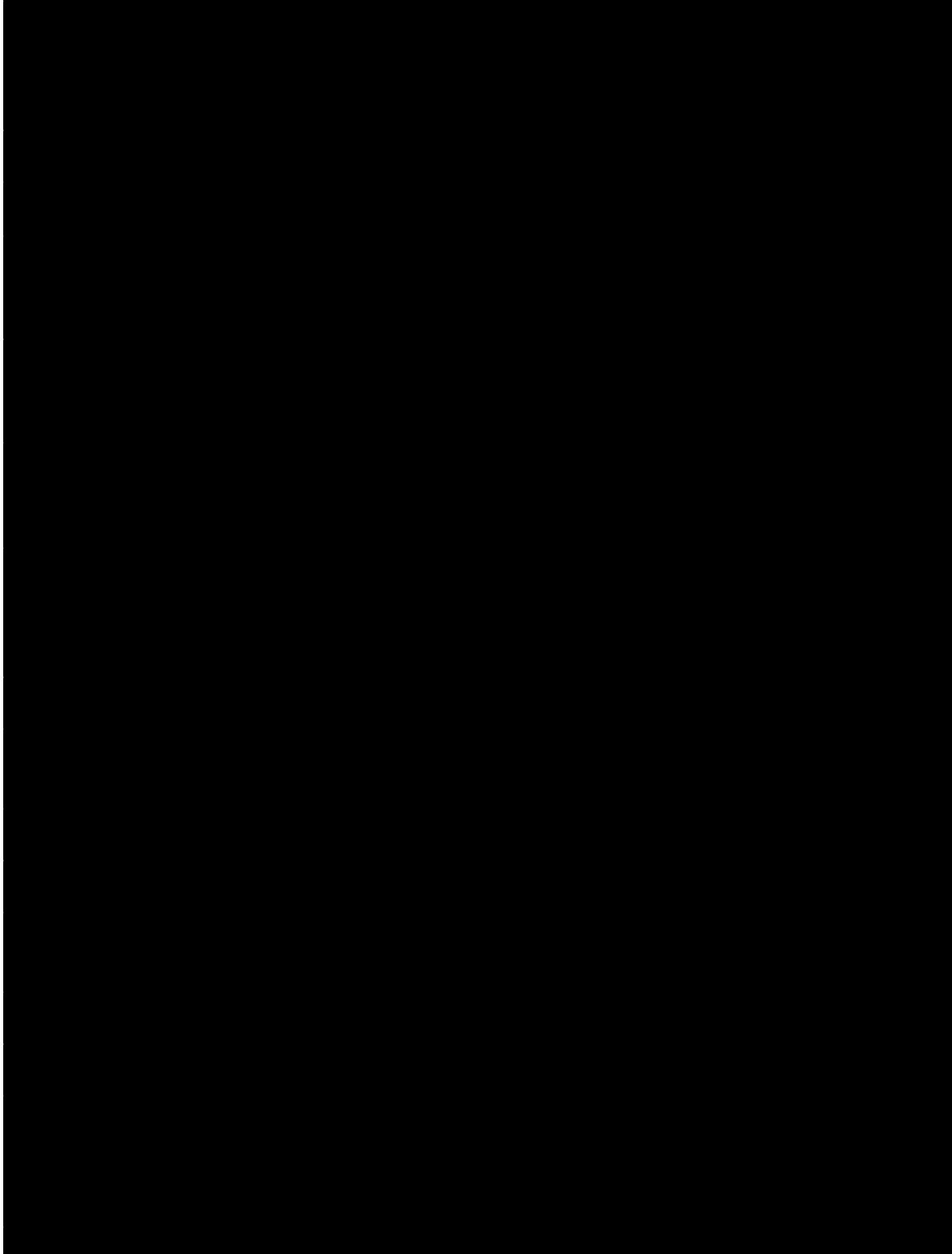
The remaining three systems (CMS #1, CMS #2 and CMS #3) are being recommended to CLIENT. Each vendor description includes the following information: description, examples of use, technical specifications using our criteria chart (see below), analysis of implementation, explanation of why we're recommending this system, potential challenges we foresee with using this vendor.

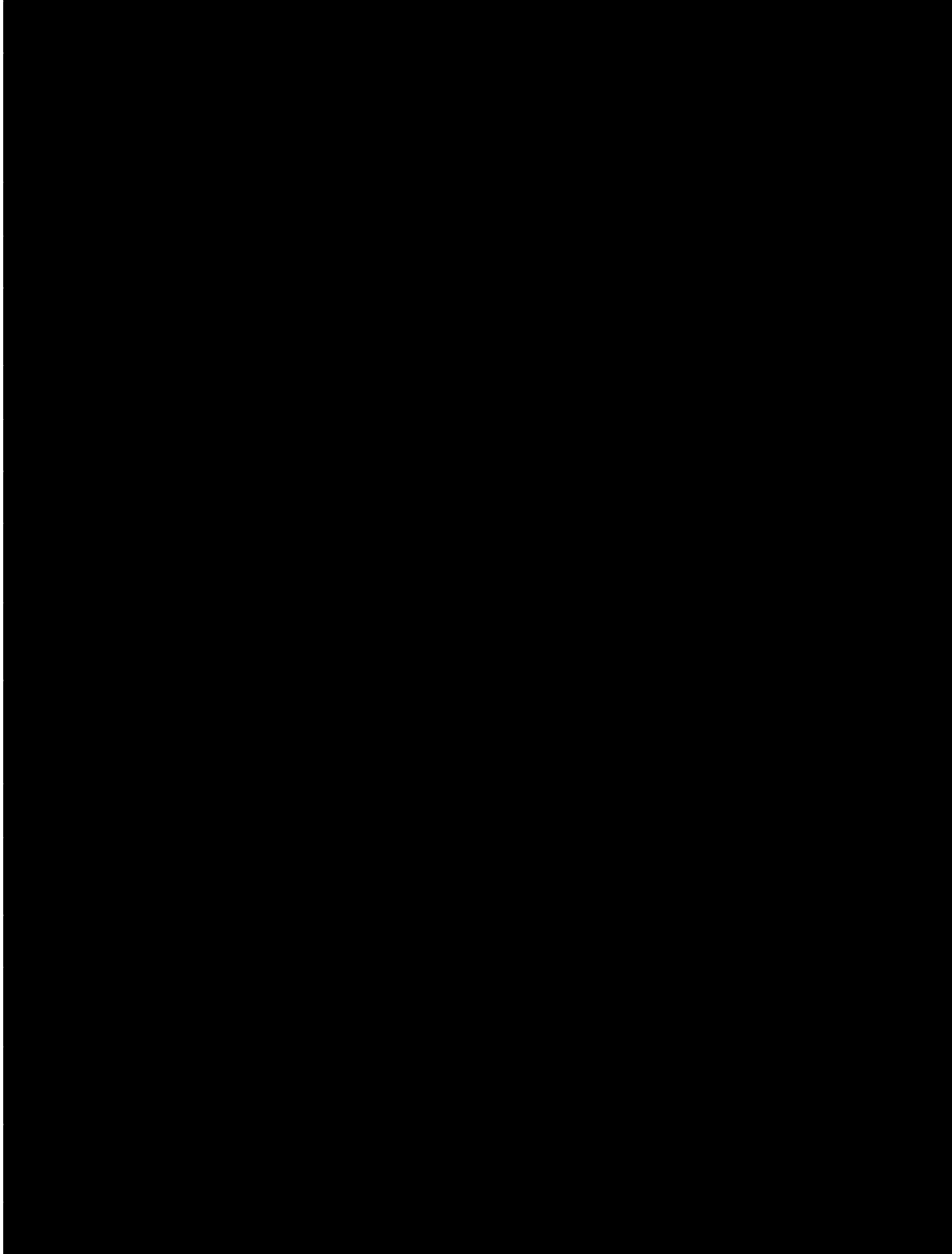
Please carefully review the technical criteria explanation chart below before reading the vendor section. We have evaluated each CMS on the basis of 60 criteria. We have provided a complete list of the technical specifications we used to evaluate each vendor and also included detailed explanations for each criteria.

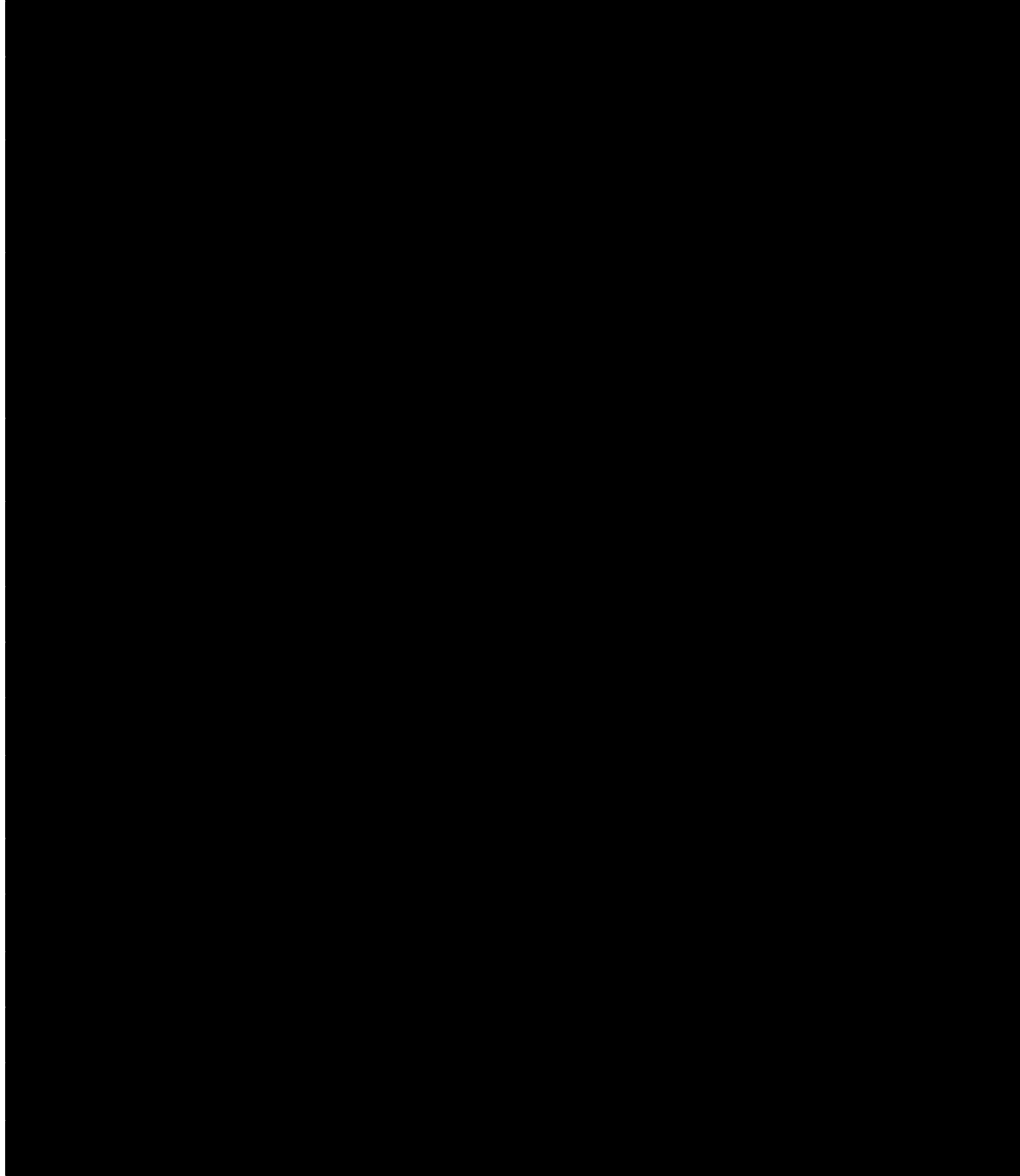


Webbmedia Group's 75 Technical Criteria - Description

CRITERIA	WHAT IT MEANS
System requirements: server?	What kinds of software does your server need to run? There may not be any requirements for some systems.
Operating system?	Does the CMS require Windows? Linux? Mac?
Programming language	What language is the CMS created in? There are many different options: SQL, PHP, etc.
Users have root access?	Can you access the primary files of your Web site?
Users have shell access?	Shell access gives you the ability to run commands and change parts of the site regardless of where the files of your site are actually being stored.
Users have email access within system?	
Hosted?	









CMS #1

COMPANY INFO: URL

SAMPLE USERS: ORGANIZATION, ORGANIZATION, ORGANIZATION, ORGANIZATION, ORGANIZATION, ORGANIZATION, ORGANIZATION, ORGANIZATION, ORGANIZATION, ORGANIZATION, ORGANIZATION, ORGANIZATION

WHY: We're recommending CMS #1 because it is currently used by CLIENT.

SUMMARY: CMS #1 is an enterprise web content management system designed to provide a single content view point to manage large and growing web sites. Features include:

- Non-technical management of Internet, intranet, extranet, and portal sites
- Dynamic generation of bread crumbs, site maps, and context sensitive navigation menus
- Content transformation from a single source into HTML, PDF, WML, and XML
- Powerful workflows, audit trails, version control, users, groups, roles, and data capture engine
- Advanced multiple server publishing

APPROX. COST: Single CPU license from \$40k, Multi-CPU license from \$60k

LICENSE TYPE: Closed Source

CRITERIA	CMS #1
System requirements: server?	J2EE
Operating system?	Platform independent, uses any system
Programming language	Java
Users have root access?	Yes, however the ORGANIZATION does not allow root access
Users have shell access?	Yes, however the ORGANIZATION does not allow shell access
Users have email access within system?	



Why We Recommend CMS #1

For CLIENT's purposes, CMS #1 offers the ability to publish content in a templated fashion. Once templates have been determined, users with little or no Web skills can easily create and publish content.

We know that CLIENT has had problems in the past configuring CMS #1 to be more malleable and nimble. Some of the "files" don't make sense, and it can be labor-intensive to create new sections or to rearrange certain content areas. Additionally, creating a new navigation structure without the aid of an outside firm would be impossible.

Some of these issues may actually stem from a lack of thorough training and regular access to documentation on how to modify the system. With proper training and access to resource materials, we feel confident that CLIENT could modify content on its site, possibly without a constant reliance on an outside developer or design group. To be sure, CMS #1 is not as easy to manipulate as other systems, and the process to add or subtract elements of navigation, content areas and the like does require a certain level of expertise.

The main, and perhaps the most important reason we recommend CMS #1 is this: the ORGANIZATION currently supports it. CLIENT staff is already used to CMS #1 abilities and limitations, and redesigning the site would be a matter of changing some architecture and using many third-party services off of the ORGANIZATION's servers. (More on that below.) In short, CLIENT wouldn't need to seek out hosting services and equipment. Should something go wrong, the ORGANIZATION has a GROUP to fix things. And the approved payment system is already interoperable with Cascade. Functionality would be limited, however there would be fewer concerns about short and long-term support. Ostensibly, staying with CMS #1 would also cause fewer problematic conversations (regarding CLIENT's site) with various departments within the ORGANIZATION.



Potential Challenges With CMS #1

CMS #1 poses two major challenges for CLIENT: (1) availability of features and (2) availability of ORGANIZATION staff to allow and implement site changes in a reasonable timeframe.

1. Availability of Features

CMS #1 simply does not offer many of the features CLIENT identified as priorities for the new site. For example, wikis are not currently available for use within the system. While discussion forums ARE available, the ORGANIZATION does not offer them as part of its licensing agreement. There is an additional charge to build and implement discussion forums, however they are available. (The ORGANIZATION staff we spoke with said that CMS #1 does not offer discussion forums -- this is simply not the case.) Some of the more advanced event registration and product pages may prove difficult without breaking the system a bit -- however any real backend changes to the CMS would require greater access than the ORGANIZATION currently allows to CLIENT. (Breaking or tweaking the cms is a common practice.)

In our experience, most content management system vendors are willing and able to build out additional features. They will sometimes charge for those features, or sometimes they'll treat the client as a guinea pig to test workability. If CLIENT determines that CMS #1 is indeed the best CMS choice at this time, it may be worthwhile to speak with CMS #1 to see whether they would be willing to work with you to build out additional features.

2. Availability of ORGANIZATION to Allow Changes/ Implement Site Changes

While the lack of features will certainly present a problem for CLIENT in the near and long term, the biggest challenge we see is working with the ORGANIZATION to create a website that is best optimized for CLIENT's needs. Features can be added with direct access to CMS #1; changing the ORGANIZATION's security protocol and workflow process won't be that easy.

The ORGANIZATION will not.....

Additionally, many of the social networks now offer APIs, which enable other organizations to.....

While we recognize the need and importance for security measures, we also know that many ORGANIZATIONS ORGANIZATION oppressive rules and regulations that create redundant work and unnecessary.....



With all that CLIENT hopes to accomplish on its new site, we fear that all of the rules and regulations would greatly stifle development.

Worse, using CMS #1 would require that CLIENT fit into the ORGANIZATION's scheduling system. There are many points of assessment and review, as well as multiple steps in order.....

This poses some obvious and serious problems. First, Web sites should be evolving ecosystems. CLIENT will offer new navigation and features with its redesign, however it will take a few months of constant use to determine what's working well and what elements need to be refined or even eliminated.....

We worry that because CLIENT itself is still.....

We acknowledge that CMS #1 meets most of CLIENT's technical specifications and is a known entity. That said, continuing to work with the ORGANIZATION to develop and deliver site content may actually be more problematic than the lack of features CMS #1 offers.....

CMS #2

COMPANY INFO: URL

SAMPLE USERS: ORGANIZATION, ORGANIZATION, ORGANIZATION, ORGANIZATION, ORGANIZATION, ORGANIZATION, ORGANIZATION, ORGANIZATION, ORGANIZATION, ORGANIZATION, ORGANIZATION, ORGANIZATION, ORGANIZATION

WHY: CMS #2 is the most flexible, extensible CMS available and has a wide development and support community. It can most easily accomplish all that CLIENT hopes to do on its redesigned site and is very user-friendly.

SUMMARY: Free, open source software package that allows an individual or a community of users to publish, manage and organize a wide variety of content on a Web site. Widely heralded by the Web community as the best solution available and a current favorite among Web designers and developers.

APPROX. COST: none – open source; development and implementation costs would be extra.

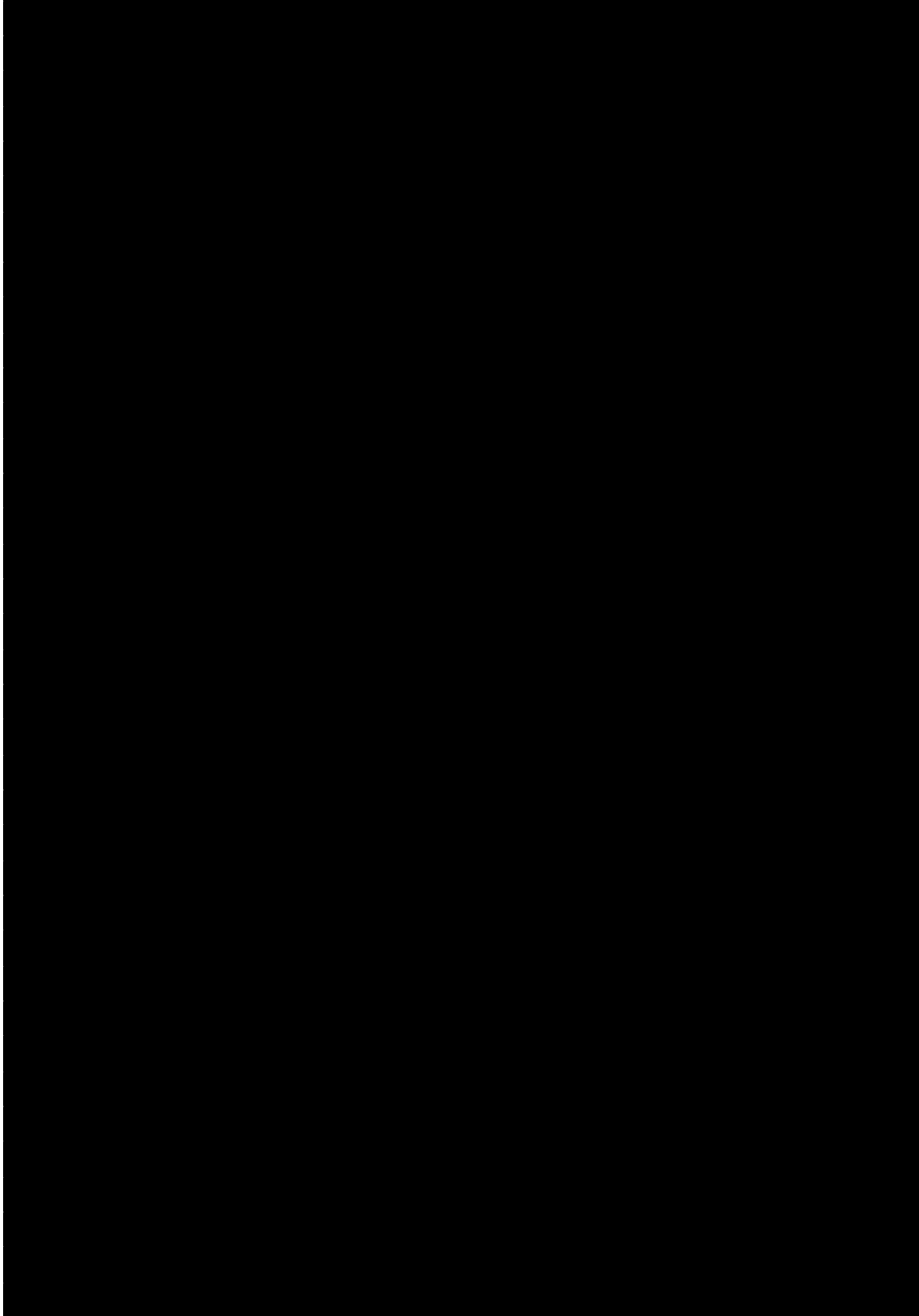
LICENSE TYPE: CCL

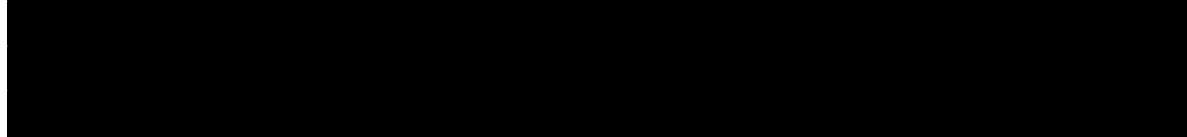


ADDITIONAL RESOURCES: There are numerous CMS #2 how-to guides and handbooks available from.....

System requirements: server	PHP 4.3.3+
Operating system	Any
Programming language	PHP
Users have root access?	Yes
Users have shell access?	Yes
Users have email access within system?	







Analysis of Implementation

For many reasons, we very much like CMS #2 as a CMS. It works with virtually every system. It's very nimble and simple to manage. There are literally thousands of features that can be (relatively) easily plugged into a CMS #2 site to enable any number of functions, bells and whistles. CMS #2 offers extensive documentation and how-to guides as well as a large, active developer community that's usually willing to help train folks and get questions answered quickly.

That said, the ORGANIZATION.....

Why We Recommend CMS #2

CMS #2 is a universal CMS: it is open source code, which means that users can look under the hood to make lots of changes and customizations. Either alone or with the aid of a developer, CLIENT should be able to do nearly anything it wants with its Web site. Discussion forums, wikis, blogs, social networks...no problem.

A complete list of free modules is listed here: URL. For example, you can easily offer the content on any page of a CMS #2 site as a PDF or printer-friendly version -- it all happens on the fly. There are a number of plugins that could allow CLIENT to restrict access to designated content without first logging in. An unlimited number of restricted user classes is allowed -- it's really up to CLIENT. And while mobile is not currently a priority, at some point CLIENT may want to allow users to interact with the CLIENT site via SMS texts or to create a mobile version of the CLIENT site without having to publish something separate. CMS can easily accomplish both tasks.

Features are built by the CMS #2 community -- but they're also tested and vetted by the community. For this reason, not all features are bug-free. However, each feature offers extensive notes and comments. With research, good plugins can be distinguished from those not quite ready for prime time.....

With the right development team, CMS #2 is fully customizable and should be limited only by (1) the developer's aptitude and talent in complex workflows and coding and (2) CLIENT's imagination. (If CLIENT can imagine a feature, it probably exists already in CMS #2.) We would strongly recommend that should CLIENT choose CMS #2, that an investment is made into thorough training.



Potential Challenges With CMS #2

While CMS #2 certainly offers the features and extensibility that CLIENT seeks, it has one major drawback.....

This issue cannot be overlooked or overemphasized. Without ORGANIZATION support.....

We strongly recommend CMS #2 because of the flexibility and features it offers, and also because it would afford CLIENT the independence and timeframe to develop accroding to a schedule that makes sense for the ORGANIZATION. That said.....

CMS #3.....



Section Five: Our Recommendations and Next Steps

If CLIENT could implement CMS #2 on the ORGANIZATION system, the decision about a new CMS would be easier. We would strongly recommend CMS #2 and move on to the next stages of site development with you.

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CLIENT must weigh CMS #2's features and benefits against the penalties of.....

In order for Webbmedia Group to complete the process of (1) creating a use case document explaining how all of the features and architecture should work and (2) recommending development and design vendors, a final CMS decision must be made. The use case document will be written to the CMS selected, and we will only recommend vendors who have extensive experience working with that particular CMS.

Recommendations - How to make this decision: We recommend that all necessary CLIENT team members read this report and consider all of the options. It may also be useful to contact ORGANIZATION.....

Next Steps: We will meet with CLIENT to discuss this report and our findings, as well as our recommendations for selecting the right CMS. After this phone conference, CLIENT should plan to meet internally and discuss all of the tech specifications, options, and analysis listed above. By December 17th, CLIENT should have made a final decision as to which CMS it will use, and we will then begin making recommendations for vendors. It is imperative that CLIENT's CMS decision is final. If more time is needed to make this important decision, we can certainly delay researching vendors and preparing the use case report by a week or two.....



If you have any questions about this report that need to be answered ahead of our next meeting, please do not hesitate to contact us at 267-342-4300.

WEBBMEDIA GROUP CONSULTANT can be reached directly at emailaddress@webbmediagroup.com.