



How to select the right content management system.



Whether you're looking to centralize your content silos or empower your marketing team to more efficiently create and publish content for all your different touchpoints, the right content management system (CMS) is a business imperative. Every organization is at a different point in their ability to drive content velocity. Likewise, every organization has different levels of familiarity with relevant requirements and capabilities to look for in a CMS.

Wherever you are in your CMS journey, investing in a new solution is an important decision that will have significant short-term and long-term impacts on your marketing efforts. Reaching the best decision for your organization will take considerable time and effort that will likely involve you engaging in substantial research and evaluation. To help you in that process, this guide covers some of the most important questions you should ask and issues you should investigate. It provides tips for navigating the information and targeted marketing you'll encounter along the way to help you make informed, objective assessments of the solutions you evaluate.



1. Omnichannel content delivery.

Marketing has evolved from simply reaching customers through web, email, and mobile channels to a world where those touchpoints are only the starting point—and have been rapidly succeeded by the growing need to reach customers through voice assistants, Internet of Things (IoT) devices, digital signs, virtual reality, and other emerging technologies. Beyond this, customers expect their in-store experiences to be consistent extensions of their online journey. And online journeys continue to evolve to reflect the fast, dynamic, and interactive experiences customers expect from their mobile apps.

This evolution from a few basic customer interactions to several dynamic touchpoints has spawned a move from traditional CMS solutions with user interfaces to API-driven, headless CMS solutions.

Before we get into the details, here's a high-level overview of traditional, headless, and hybrid CMS solutions.

Traditional

A traditional CMS manages and delivers content on a single technology stack. It controls all of the templating and presentation logic and outputs fully formatted HTML. It typically provides an end-to-end solution for a limited number of channels, like websites, where it owns the front-end experience.

Headless

The term "headless" originates from the idea that the front-end presentation layer is the "head" of the application. Rather than delivering HTML or formatted content directly, a headless CMS decouples content from presentation, enabling content to be used by a variety of front-end technologies like mobile apps, social media, or IoT devices.

Hybrid

A hybrid CMS provides all the benefits of a headless CMS—plus the ability for you to use simple tools for managing and updating experiences, such as editing content in a WYSIWYG interface. A hybrid CMS also provides support for developers to build experiences on their own frameworks.

Put your CMS to work.

With the right CMS—whether traditional, headless, or hybrid—you can deliver great experiences across a wide range of touchpoints and formats.

Touchpoints:



Digital signage



Mobile and native



Screens



Off-site digital



Field sales



Chat and voice



Wearables



IoT



Anywhere commerce

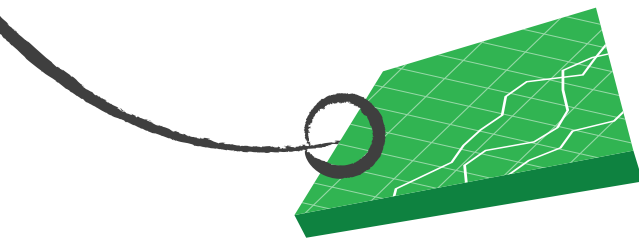
Formats:

- Multiscreen
- Adaptable
- Multichannel
- Format-agnostic



While a growing number of organizations recognize the benefits of a decoupled architecture, some make the mistake of trying to create their own hybrid environment. They do this by using a traditional CMS for content authoring and then trying to sync it with a separate, headless-only CMS for content delivery. This approach creates several pitfalls—the most prominent being that in having to deal with at least two separate systems, you lose the benefit of a central repository and process for managing your content. And if your traditional CMS doesn't support content authoring for all your touchpoints, you'll have to invest in additional authoring tools that create even more content silos and complexity.

A hybrid solution can deliver all the benefits of a decoupled architecture along with centralized content management. To make sure that's what you're getting, there are several things to look for. First, does it give you both the flexibility of a headless publishing environment with the efficiency of channel-centric content authoring? In addition to headless delivery, does it provide a centralized way to manage all of your content easily and efficiently?



To facilitate the delivery of consistent experiences, can you easily reuse content from your mature channels for custom apps and emerging touchpoints? Does it let you create and manage optimized experience content that scales easily across products, services, and organizations without waiting on developers? Does it let you bring all your analytics data together to get a better understanding of customer behavior and deliver the right content across channels? Does it have artificial intelligence (AI) capabilities to help you optimize experiences? Can it address your centralized governance and approval workflow needs? Does it let you consistently manage requirements across different geographies, languages, or brands? Does it provide a full editorial environment that lets you create content once and publish it quickly to any channel? A hybrid CMS that does all this can give you the flexibility and efficiencies to deliver the consistent, cross-channel content experiences customers demand.

QUESTION TO ASK:

Does the solution give marketers the ability to create and manage content easily while giving developers the control they need to publish that content quickly and easily?

2. Content personalization.

Your customers expect content that is personalized and relevant to them. If your CMS doesn't provide personalization capabilities, you will struggle to meet that basic need. So, while one of your first questions needs to be if it supports personalization, the follow-up questions need to explore the power of its personalization capabilities. For example, you might feel that a basic rules-based approach to personalization will be sufficient. And that might be true for the first six months or a year, but what happens when your marketing efforts mature and you realize that to be competitive you need more robust personalization that can scale and grow with you? Rather than putting yourself in a position where you have to purchase a new solution soon after your initial investment, choose one that gives you a seamless way to evolve and grow into your future.

QUESTIONS TO ASK:

- Can the solution's personalization capabilities scale?
- How will it help us address personalization beyond rules-based methods?
- Does the vendor have case studies that demonstrate how their customers have delivered results at scale using its personalization capabilities?

Being able to deliver personalized, relevant content at scale is a big determining factor of whether a CMS can grow with you. When you have thousands of audience segments, how can you possibly achieve a one-to-one mapping? Trying to do it manually is impossible. And a rules-based approach to personalization simply doesn't scale.

Personalization at scale requires AI that can consume and act automatically on vast amounts of analytics and data. Whether it's to dynamically allocate traffic to winning customer experiences from your A/B testing or constantly enhance audience segments and reallocate experiences based on those new definitions, AI is the only way you can deliver personalized content at scale while it's still relevant.

POTENTIAL GOTCHA:

In an attempt to check off a "requirements box," some vendors offer add-on personalization modules, but they are often too simplistic to meet an organization's actual personalization needs.



3. Empowering both marketing and IT.

When it comes to meeting the needs of marketing and IT, many CMS vendors act like you have to choose between one or the other. Don't settle for a solution that doesn't allow you to empower marketing and IT, as both play important roles in content management, creation, and delivery. Prioritizing one over the other with your CMS can cripple your content management success significantly.

To operate with agility, companies should provide marketing and IT teams a single platform that integrates with their tools and serves all stages in the content creation process. Such a platform should automate workflows between content creation, work management, digital asset management (DAM), and distribution tools and processes. This means you'll want to look for a CMS vendor who brings together the tools you use to plan, execute, review, and deliver work—so you can power true cross-functional collaboration.

The idea of catering to one stakeholder over the other is clearly seen in the debate between traditional CMS and headless-only CMS. With their dynamic, API-driven architecture, headless-only solutions give IT the power and capabilities they need—but cut marketing out of the equation. By contrast, the user interfaces of traditional CMS (even when deployed in conjunction with a headless solution) give marketing what they need, but create massive content and process silos that complicate IT's ability to support omnichannel delivery. A hybrid CMS aims to please both, but be sure the solution you're considering truly empowers both.

Marketers will want a solution with self-service capabilities that enables them to easily do their jobs without having to wait on IT for help. That includes using governance workflows to manage content in a way that allows them to maintain message and brand consistency throughout the customer journey. Marketing will also want to be able to roll out and update campaigns at scale and at the required velocity with personalized content that is relevant to their target audiences. When they make updates to their content, they'll want to be able to preview those changes in context, without first having to complete a build. They'll also want to be able to create a piece of content once and use it across multiple channels, knowing that formatting adjustments will be made automatically. And they will want to be able to deliver on their KPIs in compelling, measurable ways.

QUESTIONS TO ASK:

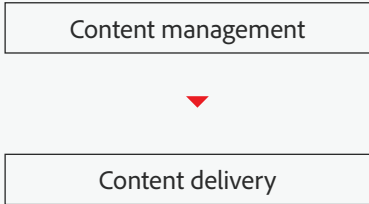
- Can IT enjoy the benefits of API-driven omnichannel delivery that a decoupled CMS provides, while still addressing governance and workflow management concerns?
- Does the solution enable marketing to fine-tune customer experience directly, leveraging the established governance parameters?
- How quickly and dynamically can those changes be made?

IT will want an API-driven solution that provides the benefits and agility of a headless solution for omnichannel delivery. Other capabilities that IT needs—that sometimes get overshadowed or forgotten amid the hype of headless discussions—include the ability to address enterprise-level governance and content deployment issues. That means controlling and making content delivery adjustments as needed for different business units, regional sites, and geographies. They will need a way to deal with localization and language translation issues. And they'll want support for content workflows, as well as the flexibility to choose whether marketing or IT executes content updates. For single-page applications (SPAs), IT will want to make sure front-end developers can use their framework of choice, while still allowing marketing teams to self-serve edits and preview changes so IT doesn't have to be involved in every minor update to the SPA.



Support for single-page apps and non-web channels drives IT interest in headless.

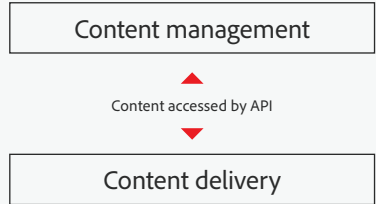
Traditional:



Example use cases:

- Web page
- Mobile web page

Headless:



Example use cases:

- SPA
- IoT
- Native mobile app

A hosted cloud-based solution will further empower IT, but keep in mind that not all hosted solutions are the same. For example, a fully managed hosted solution allows IT to focus on content and experience delivery rather than managing the infrastructure. This should include relieving IT of the burden of worrying about compliance, security, app management, and upgrades. A white-glove managed service empowers IT in a way that increases its agility and velocity significantly.

IT will also want to know about the openness of the solution. There are two extremes that you might encounter in this area: solutions that are completely open source and closed, enterprise-focused systems. But it's also worth considering a solution that gives you the best of both worlds, like one built on an open-source platform that's enhanced with enterprise-grade capabilities and responsive support.

4. TCO and time to value.

The cost of a solution plays a major role in any purchasing decision. But it's important to not only look at the upfront cost. The cost of implementing, maintaining, and updating a solution over time needs to be examined as well. This is especially true when it comes to CMS solutions, since some might appear to be significantly lower in cost than others until you look deeper into their total cost of ownership (TCO).

It's wise to consider the following things that play into a solution's TCO. What is its time to value, and how soon will you see measurable results? In addition to the raw licensing and hosting costs, what ancillary costs will there be? Will you have to invest in additional databases or servers, and if so, what additional licensing, storage, and hosting costs will you incur? What will it cost to implement the system? What portion of your business requirements can be addressed with out-of-the-box capabilities and configuration versus custom development? If custom development is required, will the workload fall to your internal staff or external partners, and what will the effort and cost look like?

POTENTIAL GOTCHA:

Many organizations only consider license costs when they evaluate solutions. Before you rule out a managed service solution, consider the total cost of managing and maintaining a solution yourself.

Whether or not a solution is optimized for the cloud has a big impact on overall costs, it's important to know that subtle differences in cloud implementations can have a material effect on costs, too. Asking the right questions early on can help you avoid overburdening internal teams or paying for services you didn't plan for. Make sure you know how the implementation of the cloud architecture and workflows will affect maintenance costs. Ask what tools the solution includes to simplify and streamline maintenance.

When it's time to upgrade, who will perform the upgrade, you or the vendor? What will those costs add up to? How will customizations be upgraded, by whom, and at what cost? Whose responsibility will it be to secure your systems and data? Whether it's you or the vendor, what will that cost in resource hours or service fees? Will you need to pay for security testing, or does the vendor already have the certifications you need? Are all necessary monitoring systems in place, and what is the cost and effort involved in closing any gaps? What percentage of system support costs will be managed by the hosting vendor? What happens when you have a spike in traffic? How will the system accommodate load increases, and what does that cost?

QUESTIONS TO ASK:

- What documentation does the vendor have to estimate total costs and baseline anticipated return?
- Will you need to plan on resources and time from internal teams beyond IT?
- What percentage of the vendor's customers are on the latest releases, thus demonstrating the ease of upgrading and getting access to the latest features?

5. Future-proof.

A good CMS should help you future-proof for emerging channels, known and unknown, while ensuring that you'll also be able to efficiently manage mature channels that will be part of customer experience delivery for the long haul. But it's also important not to view a CMS as a checkbox item. Today, companies compete on the basis of digital experiences. Your CMS is the critical nucleus that determines whether and how well you can deliver differentiated customer experiences.

Sometimes when evaluating CMS solutions, organizations focus on their initial needs or on an initial project they're trying to address. But it's important to take a long-term view of what your needs will be one to three years in the future. Think about how your personalization strategy could evolve in a year or two or what level of insights you'll need on customer experiences. Consider what your digital strategy might look like down the road and whether the solution you're evaluating will help or hinder your ability to execute that strategy. Does the solution give you the flexibility to grow into a broad experience delivery platform and easily integrate with other marketing technologies? Will it help you scale and add new capabilities as your business grows?

To truly future-proof your investment, you'll need to make sure the CMS you choose can integrate with the enterprise tools you already use. And you should be able to configure it at a granular level to suit your business needs. This includes easy integration with content creation platforms, data platforms, analytics solutions, marketing automation, campaign management, advertising platforms, work management solutions, commerce engines, and more. And when it's built on a truly extensible architecture, a CMS can scale easily and remain powerful long into the future as your company grows and your needs change. Which means you'll save big on cost and time.

Which approach is right for you?

Content is the foundation of every experience. And that means you need the right CMS to keep up with growing demand, mounting expectations, and emerging channels. And what works for another brand might not work for you.

Let's figure out which approach best fits your needs. It starts by understanding a bit about the options available: traditional, headless, or hybrid CMS. Here are some questions you can ask to get you started:

Traditional

- Do we have limited technical resources?
- Do we only require simple publishing capabilities?
- Does our marketing team need to be self-sufficient in editing and previewing content?

Headless

- Do we need front-end flexibility to deliver content across channels?
- Do we expect our tech stack to change in the future?
- Do we need to increase our marketing velocity?

Hybrid

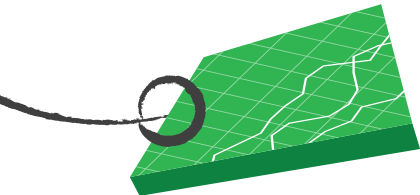
- Do we need greater ability to reuse content and consistently deliver across channels?
- Do we need an easy-to-use interface for marketers, while also giving our developers flexibility to build experiences on their preferred frameworks?
- Do we need to future-proof our CMS for new publishing channels?



After asking those questions and getting a feel for which option might be best, take a minute to work through our decision matrix:

| | Benefits | Challenges |
|--------------------|---|--|
| Traditional | <ul style="list-style-type: none">• Simple development and content management• Quick dev due to plug-and-play themes and templates• Non-technical control over content and web data | <ul style="list-style-type: none">• Limited content types and delivery channels• Increased effort and complexity for customization• Limited reusability of content in the database |
| Headless | <ul style="list-style-type: none">• Flexible omnichannel delivery of content• Faster experiences• Scalability and easier redesign | <ul style="list-style-type: none">• Reliance on IT to implement and maintain• Increased complexity and dependence on additional front-end technologies• Slower time to market |
| Hybrid | <ul style="list-style-type: none">• Consistency across channels• Quicker content delivery• More content control• Future-ready experiences | <ul style="list-style-type: none">• Some upfront development• More work required for single-page application SEO optimization |

At this point, you should be ready to make an informed decision on the right CMS for your needs. Which means you'll soon be on your way to delivering better, faster, more relevant content experiences.



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