



Content Management White Paper

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Content Company, Inc.
and **E-WRITE**



The Top 25 Things Every Content Management Vendor Should Know About What their Customers Want

At a recent national content management conference, we hosted a discussion about what a content management system should offer. Discussion participants represented organizations including Philip Morris USA, Wachovia, Deloitte & Touche, IMPASS, RLI Insurance, Fannie Mae, and Starphire. This white paper offers a rare look at CMS requirements from content owners' perspective.

As a baseline for success, your CMS must not only integrate with your customers' existing technology, it must also speak the language of the content owners who will be using the system. These content owners must be able to use your CMS successfully and comfortably with little training—out of the box, before customization. If content owners cannot use your system without extensive training, they may not use it—and you, then, have lost the opportunity to retain a customer and expand your reach inside that company.

In this white paper, we give you, CMS vendors, a look at your customers' wish list. Here are the top 25 things you should know about what content owners want from their content management systems.

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- 1. Be compatible with common office applications.**
Content owners are adept, often expert, users of applications such as Microsoft Office. Out of the box, your content management system should be able to accept text pasted directly from Word or other word processing programs and alter any tags necessary for accurate delivery.
- 2. Enable users to format their content without going into the code.**
Your CMS should make it easy for content owners to add simple formatting to their content with no HTML knowledge or IT intervention necessary: bold, italics, bullets, links, and other common features.
- 3. Enable truly nontechnical users to manage their content.**
File structures, format extensions, and technical terminology scare nontechnical content contributors. For example, most content providers don't even use the term *workflow*; they use *editorial process*. So create an interface that presents a structure and uses terms that content contributors understand.
- 4. Include web-based administration tools.**
Give users "Edit this page" permissions and functionality: If a system recognizes a content owner, it should enable that owner to update a page dynamically, without having to open the CMS application at all.



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- 5. Assign a high-level administrator role to select content owners too.**
Your CMS should be able to distinguish between the systemwide administrator role and the role of content administrator. The systemwide administrator role is the highest-level role and will be assigned to only one or two people. But the content administrator role will belong to more people who should be able to manage permissions and access for the people in their group but not for people outside their realm.
- 6. Expect common metadata, and build it in.**
With content management beginning to mature as a field, metadata is an assumed element in CMS projects. Many metadata fields can be taken for granted in a CMS. Page author, owner, and last updated date, for example, should be included in all page templates.
- 7. Have a familiar interface.**
There's no need to reinvent the wheel. It's time that the CMS industry adopt a common terminology, structure, and GUI, so that users know what to expect...no matter which system their company uses. Work with other CMS vendors to develop a best-practice interface.
- 8. Acknowledge and work with variations on the approval process.**
Reality: Some of the approval process for any piece of content occurs by licensed CMS users within the workflow structure of the tool, while some of it happens outside the tool. If, for example, a company doesn't purchase a license for the legal department (because the legal department doesn't want to learn to use the CMS), then the legal department will probably be emailing content they provide or approve. Figure out how your tool can accommodate this outside-the-tool workflow, so content owners and technical developers don't have to write workarounds. Your system should go beyond just emailing the legal department a link to new content that requires their approval; it should allow a lawyer web-based access for one-click approval.
- 9. Develop a licensing structure and interface based on types of users.**
Some content owners are heavy users of a CMS, frequently producing and publishing content. Since they use the tool often, they need a full license and will come to understand the nuances of a tool's interface. Your CMS is also likely to have much more occasional users: approvers, publishers of small amounts of content, or owners of content that does not get updated frequently. These users need a simpler interface—or no interface at all—and the license for them should be less expensive.
- 10. Develop for the broadest possible audience.**
Macintosh computers and Netscape browsers still have a share in the business market. If you fail to develop for these “outliers,” you are excluding a small but significant segment of users from your customer base...not wise, especially in these tougher economic times.



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11. **Build in robust internal security.**

It should be extremely easy for technical developers—or even nontechnical super-users—to set permissions for parts of the site. The permissions should be definite and precise: A user may have permission to update one section of the site but be forbidden to touch another section.

12. **Make it easy for customers to buy and implement your product upgrades.**

Currently upgrades require extensive rework, expensive consultants, and project pain on the part of content owners and technical developers alike. When a company upgrades to the newest and spiffiest version of a CMS, many of its customizations are overwritten or lost. So don't make your customers rebuild from the ground up when they purchase an upgrade. Build your product so customizations carry over from version to version.

13. **Inspire and allow information sharing.**

Content management is often part of a company's move toward sharing knowledge and collaborating. Don't segment content into restricted silos of projects or websites; this makes it impossible for business users to see—and make use of—content that doesn't belong to them. Instead, distinguish between editing and viewing; both should be able to be done in native formats (vs. the current state of being able to view a file only in code and only edit it in WYSIWYG). Help content owners see each others' information more easily, a shared repository, shared assets.

14. **Before you complete a sale, make sure you work with business users and content owners, in addition to technical people and budget owners.**

Business users need your expertise...and you need to work with them to understand their requirements, which they will articulate in different terms than the technical development team uses. What a business user calls *site organization* or *types of content*, the development team calls *taxonomy*. Make sure you speak **all** your customers' languages.

15. **Incorporate commonly developed “extras” into your baseline product.**

These add-ons should be included in even the bare bones version of your product:

- Smart HTML code checker
- Find-and-replace throughout a branch or site
- Highlight changes in a piece of content throughout its versioning and workflow processes
- Grammar checker
- Customizable dictionary that incorporates a company's style guide
- Link checker



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16. Develop smarter workflow capabilities.

Content owners are not all alike. A new employee may interact more with his or her approvers; if one approver is on vacation, someone else needs to step in during that time. Your workflow must allow for this. For example, a press release may require three levels of approval when Jane wants to publish it because she's new; another press release may require only one level of approval when Fred wants to publish it because he's a company veteran. Business units need to be able to specify automated workflow to suite the document, the situation, and the content owner. Workflows should be individualized, customizable, and flexible.

17. Your CMS needs to be extremely "helpful."

A content owner is using the CMS for the first time in several months. Another is using it to not only approve content, but to publish it for the first time. Who do they turn to for help? How are their questions answered? Your technical resources and consultants may not be available when one of these content owners needs help. Your CMS should provide contextual help – written in simple, nontechnical terms – that leads a content owner through each step of the process.

18. Help users understand the context for their work.

While each piece of content may be created and managed individually, site visitors arrive at that content via other pieces of content and in the larger context of the site. Therefore, your system needs to help content owners understand how their material will function within the larger context of the site. Your CMS should help users know how their content will work and look before they publish it. The CMS should show users how "heavy" their page will be with content elements, navigation, and graphics, etc. The CMS should calculate page features such as average word count and download time. It should offer a page preview option, too.

19. Build in content reusability.

As an expert CMS builder, you know that content is most effective when it is broken down to the element level, rather than simply to the document level. Make sure your CMS allows your customers to treat the elements of each document separately, not only glued together. Users should be able to contribute or edit content elements: document title, document summary, sidebar, headings, even a truncated version of content for wireless delivery. Even if a customer cannot take advantage of this feature at a project's outset, this element-level approach will make future phases easier and quicker.

20. Allow pages and sections to be grouped together.

The flip side of document elements is also useful: A collection of pages may have the same metadata and require updating at the same time by the same person. Your CMS should enable users to group pages together so they can be updated easily, ensuring that the information contained within them remains consistent.



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21. **Price your product realistically.**

Yes, your software enables web publishing to be easier than ever, allowing a company to have accurate, relevant information on its website. However, content management is no longer a “whiz-bang” invention, it’s a usual cost of doing business. And your pricing should reflect that: Customers cannot afford to pay for your R&D efforts, and they shouldn’t have to. Also, make your pricing more transparent, including user license options. One company in the market for CMS was unaware that they needed to purchase user licenses, and it didn’t account for this cost in the project budget. The lack of pricing information may have discouraged or squashed a sale.

22. **Show your maturity.**

Take advantage of the Web conventions that have become standards: Build in standard navigation elements and predefined formats and templates for customers to adapt, so they don’t have to build everything from scratch.

23. **Develop a variation of your product for intranets so customers’ internal web can do everything their public web can do.**

Intranets need a CMS that can:

- convert newsletters from print and e-mail
- archive news pages or content
- display/manage news pages
- integrate content from a wider variety of sources and from content owners who do not know each other or who work at separate locations
- encompass multiple levels of ownership and workflow, with complex relationships between content items
- simplify and support human resources functions

24. **Design to respond to industry-specific CMS needs.**

Financial sites, for example, may need their CMS to handle disclaimer information that can be searched and retrieved by date. Business-to-business sites may need to explain affiliate programs while consumer-focused sites will not. Make sure you find out what various industry and audience needs are for compliance, workflow, versioning, and recording the correlation of versions with specific visitors.

25. **Share your best practices.**

Create a forum for your client business users to share theirs also. This enables you to remain at the center of the conversations about your product and your company.

This white paper was produced by Hilary Marsh, president, Content Company, Inc. <http://www.contentcompany.biz/>, and Leslie O’Flahavan, partner, **E-WRITE** <http://www.ewriteonline.com/>.

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