

# Seven Crucial Lessons Learned In Content Management System Implementations

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# Executive Summary

Great implementation is not just a nice-to-have benefit when choosing a content management system (CMS) — it is an absolute business and technology imperative. Without the right implementation plan, the CMS will not deliver the benefits that organizations anticipate. More importantly, the CMS will not have the transformative impact that executives, managers and workers expect to realize. Think about it this way: Companies can easily spend \$1m to \$1.5m to buy and implement a new CMS, and they are making a commitment to live with the new solution for five to seven years, based on the industry average life of a CMS. With this much at risk, it's imperative for companies to be sure they are making good choices and are drawing on the experiences of those who went before them.

This report examines seven key lessons learned by organizations that have selected a CMS solution, and are now in the process of implementing or have already implemented the technology. This research follows on the heels of an earlier project that examined the five lessons learned by these companies during the selection process. (See “Five Crucial Lessons Learned in Content Management System Selections.”) Digital Clarity Group surfaced these best practices by talking with CMOs, COOs, CIOs, marketing executives, brand managers, IT managers, CMS managers, and other business and IT professionals at more than a dozen organizations across a range of sizes, industry sectors (including government) and geographic regions. These firms represent an array of industries, from global hospitality and consumer packaged goods companies, to medical research and a medical device manufacturer, to insurance and banking, as well as state/provincial government agencies in the US and Canada. We also interviewed large non-profits, large universities, and a high-tech startup and a large consulting firm in Europe.

No matter what location, size or industry, we asked questions like:

- Which groups were involved in your CMS implementation team?
- Was a consultant or integrator (or both) also involved?
- How did you get user and management buy-in as you rolled out the solution?
- How long did the implementation process take?
- How did you create content for the new site(s)?
- Did you use a centralized, decentralized or distributed model for the implementation?
- Who manages the website branding and look and feel?

- How did you handle globalization and localization?
- Did you involve organizational change management practitioners?
- Do you consider the project a success?
- Does the organization as a whole see it as a success?
- What would you do differently if you could do it over again?
- What would you recommend to others starting down this path?

From analyzing the responses, we uncovered seven crucial lessons learned that organizations should apply to any CMS implementation to lower risk, speed the decision-making and adoption process, garner stakeholder support, gain the expected benefits and better align the project with business strategy and objectives.

### **CMS Implementation Lessons Learned**

**Lesson 1:** Create a collaborative, motivated, multi-disciplinary team

**Lesson 2:** Develop an implementation plan up front and follow it

**Lesson 3:** Use a distributed approach for large-scale deployments

**Lesson 4:** Use digital agencies; creating content is difficult

**Lesson 5:** Know that regulatory environments are twice as complex

**Lesson 6:** Leverage organizational change management

**Lesson 7:** Use a service provider, but don't expect a guarantee

# Lessons Learned from Experienced CMS Practitioners

## Lesson 1: Create a collaborative, motivated, multi-disciplinary team

In interviews with CMS selection and implementation project managers and executives, we uncovered dysfunction in approximately 40% of those organizations.<sup>1</sup> All too often, the dysfunction wasn't because the technology failed or the implementation plan was flawed; instead it came from poor interactions and non-existent or hostile working relationships between IT, the business and marketing. Sometimes, poor collaboration started at the top of the enterprise and flowed downward, with conflict readily apparent among the CIO, CMO, line of business execs and even the COO and CEO. At other times, the conflict started at lower levels of the organization, usually because motives were misinterpreted or actions were misunderstood. Or it could be because IT was looking through a narrow technology lens, and business and marketing were looking through an equally narrow business lens. Regardless, when the team struggles to find common ground, conflict takes hold.

Take Microsoft SharePoint, for example. Several of the organizations we interviewed either implemented

SharePoint or considered SharePoint as one of their CMS options. In some cases, the projects bifurcated – with IT recommending SharePoint as its preferred solution while the business stakeholders advocated a different CMS solution. In organizations with historically poor interaction between IT and the business, IT's advocacy of SharePoint was usually viewed with suspicion, distrust and skepticism by the business; they believed that IT was not acting in the organization's best interest but rather was doing what was best for IT. In contrast, IT was absolutely convinced that SharePoint was the best technical solution at the best price point and became distrustful of the business stakeholders' strong support for a much smaller vendor (which IT interpreted as more risky) and with significantly less track record and a significantly higher price point. In reality, the two sides often did not understand each other's point of view or trust the fact that the other group was trying to steer the organization in the the best direction possible, given their prior experience and expectations. We heard this story over and over again in projects that experienced a lot of conflict between IT and the business.

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“ The most important lesson learned from these fourteen organizations is the need to create a highly motivated, collaborative team of technologists, marketers and business people who are all focused on the same goal: a successful implementation. Without this, project teams are either doomed or will struggle to work with one hand tied behind their collective backs. ”

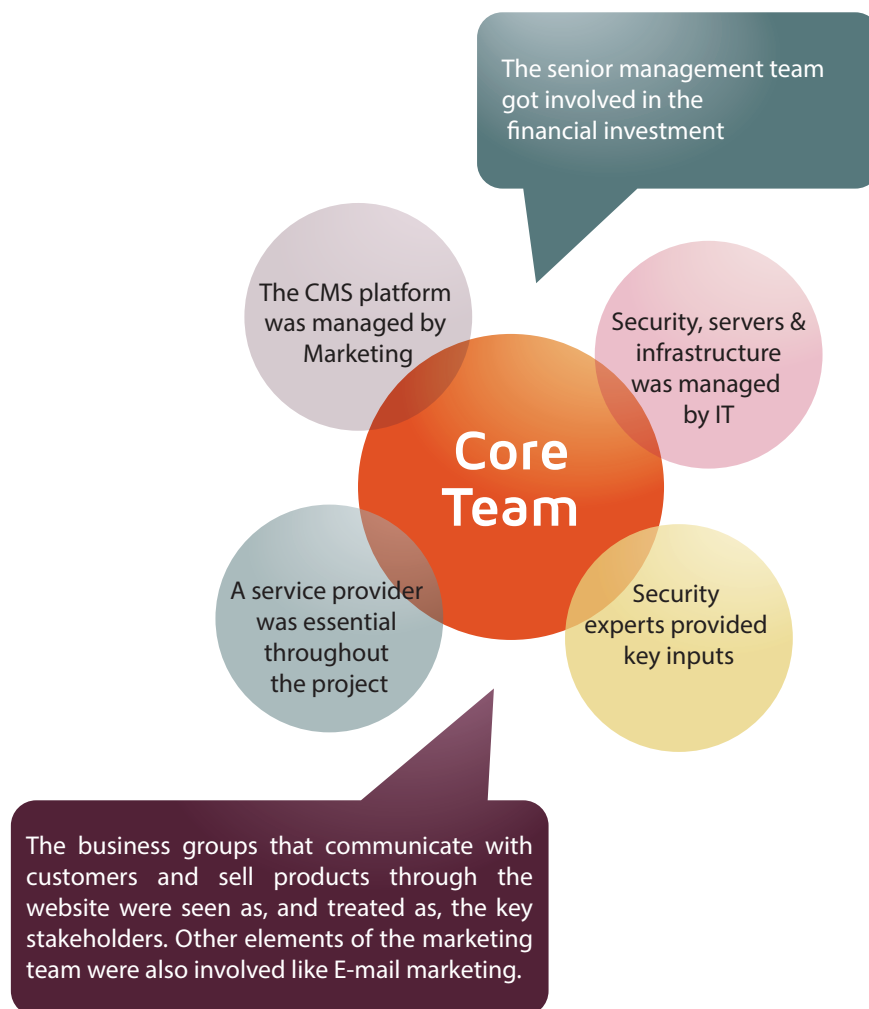
Fortunately, there are more examples of successful projects than ones that failed, and companies just getting started should emulate the successes. One such organization was an absolute standout in selecting and implementing its CMS exceedingly well. This organization had an added advantage because its mission is to educate other companies on methodologies and best practices. In this case, the shoemaker's children did not go without; the internal project was as stellar as any external project the company might undertake. This European

organization defined roles and responsibilities for the CMS implementation, establishing an important best practice and setting the organization up for success (see Figure 1):

- The business groups that communicate with customers and sell products through the Web site are seen as the key stakeholders and are treated as such.
- The CMS platform is managed in the business by the marketing team.

Figure 1.

### An Example of a Collaborative, Multi-disciplinary Team



- IT manages the underlying platforms (security, servers, and infrastructure).
- Security experts provide additional inputs.
- Other elements of the marketing team were also involved, such as e-mail marketing.
- The senior management team oversaw the financial investment.
- A service provider was involved in the project prior to selection and throughout the implementation process. The company believes the service provider was critical to the project's overall success.

Another executive from a different organization summarized the key management activities that he believes the multi-disciplinary project team should focus on throughout the implementation. Noting that “prior planning prevents poor performance,” the key components he identified include:

- **Vision** — exactly what the organization is trying to achieve
- **Strategy** — how the organization is going to do it
- **Budget** — where the funds are coming from to execute on the strategy
- **Benefits management** — how the team should articulate the business benefits and measure against them to determine whether they are delivered and the program is a success<sup>2</sup>
- **Communications strategy, project management, and organizational change management** including training — a trifecta of three important techniques for building support up and down the organization
- **Strong executive sponsorship** — which helps the project team get over road bumps

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“ Do one thing at a time. Don't underestimate the learning curve. There's a significant ramp up. ”

- Marketing manager, government agency

## Lesson 2: Develop an implementation plan up front and follow it

One important lesson that several organizations emphasized is to develop an implementation plan up front. One manager recalled how his organization turned the CMS system on and said “y’all come,” only to create chaotic results. This organization had eight different agencies that were building sites. They fell short when it came to understanding cost and integration effort – two of the most important elements of an implementation plan. The initial sites were built as if they were .net standalones even though they were really Java; they didn’t take advantage of what Java had to offer because the agencies didn’t know Java. It was much more costly to build that way, and the implementations took much longer. The lack of an implementation plan proved costly, and the growing pains lasted for the first couple of years.

Another senior CMS project manager from a large bank recalled how a vendor’s push to develop custom integration between two of its unintegrated software products almost brought the project to its knees. But in spite of this, he observed, “it’s never about the software; it’s always about the analysis and planning.” He advises implementation teams to do as much business analysis as they can upfront, including identifying stakeholder needs, and doing content

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“ Our new site will be a centralized, global site. We will sunset the older sites. But, each of the brands has its own siloed structure. There’s no uber governing body that says they will adopt it. It’s like this system is the car. It’s up to the users to drive it. We’ve been doing best practices and training, hopefully some of the tools will be reused, but we can’t make them do it. It is a voluntary adoption. ”

– Manager of global technology marketing team; CPG firm

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prep and process prep. His advice? “Get some quick wins executed.”

## Lesson 3: Use a distributed approach for large scale deployments

Many organizations that are implementing CMSes today are on their second or even third generation of CMS products. As they continue to upgrade their systems, the complexity and functionality of the CMS becomes quite advanced. One of the overwhelming themes among these companies is the need to pull a large number of independent sites together in a

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“ We still have issues with fragmentation. We have fragmented experiences across devices, across content, within a brand, and across channels and geography too – it’s pretty much across the board. Sometimes it is due to unique needs of the market within that geography. ”

- Manager of global marketing technology, CPG

distributed implementation. The configuration often involves a central site that has corporate information and a collection of decentralized sites that may support a business unit, country or department. (see Figure 2 for an example of how one company went from chaos to consistency by managing its distributed deployment.) Consider the complexity and challenges these companies faced:

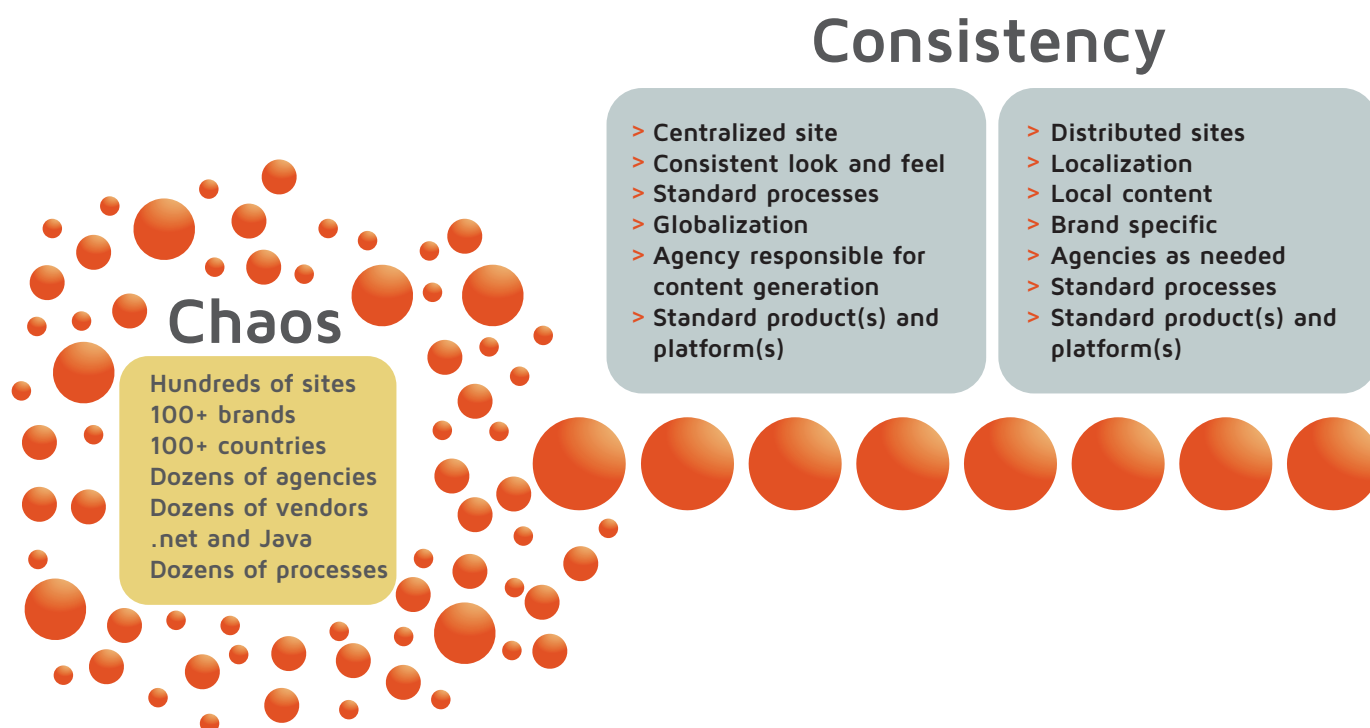
- **An insurance company has nineteen different legal entities (by province, region and chapters).** Each of these entities had different websites with different branding. The company needed a CMS to support a decentralized model that was robust and would provide shared access based on role

and security. The latest CMS project brought all 19 sites together into one site with local sites/pages.

- **A global brand wanted to consolidate all market-facing websites hosted by eighty digital agencies** around the globe using multiple CMS platforms and languages. To address the challenges, the brand created standard templates for any brand site, ensuring that they were flexible and easy-to-use with a WYSIWYG interface. The goal was to create standardized processes for all sites and CMS systems. The company also reduced the number of agencies from 80 to 12.

Figure 2.

## How An Organization Moved From Chaos to Consistency in Its Large Scale Deployment





## Lesson 4: Use digital agencies, because creating content is difficult


One of the biggest issues that all companies we interviewed faced was how to create content, and how to make that content consistent across a large enterprise of decentralized contributors.

- **A global CPG used its digital agency to create content after struggling to create content for hundreds of departments.** This organization started by creating authoring processes and identifying which person in the business or marketing would do the authoring. Finally, they realized it would be a never-ending challenge to find internal authors and took a different approach. Now they leverage their digital agency for content creation. As a result, they get content out much faster and at a much higher quality level.
- **Another global brand learned a similar lesson.** Deep into the implementation, the project team realized that no one had responsibility for authoring and editing of the site. They struggled to get internal authors and never succeeded. So they finally turned to their digital agencies. Today, they deploy sites much quicker since the agencies now author content, as well as doing development. To illustrate the magnitude of project, at one point the company had 700 sites with over 100 brands globally, each with country sites and promotion sites.
- **A large CPG company still in the midst of implementing its system** has identified content and personalization as two unresolved issues. Specifically, content

editing requires a lot of code changes. The project manager believes the CMS needs to be more agile and iterative, presenting a great opportunity to look at inefficiencies outside the workflow. Personalization is important too; in fact, this was a primary driver for the company's vendor selection. They are still wrestling with how to put the right information in front of the customers.

- **One large medical center thought it had figured out how to create content.** They planned for each medical practice in the large hospital complex to decide which content to migrate to the CMS system and which new content to create. But, they got chaos instead of order. All the medical practices combed through old publications and selected them for the CMS, even though the content looked wildly inconsistent and was hard to read. For example, after each practice contributed maps and directions, visitors to the site were bewildered by the "mishmash" of map options. And the CMS team soon learned that medical experts, who were some of the world's leading doctors, were not about to spend their limited time creating new content. The project team is still figuring out how to get content created, given that not just anyone can write medical documents appropriately. And they are trying to figure out how to go from "brochureware" to a personalized site.

Many of the content creation issues that surfaced during implementation were people oriented. Some companies also encountered technical issues related to content creation, although not at the same level as the people issues. For example, the global hospitality brand we interviewed is still wrestling with content



design. When the company's CMS was built, they structured and aligned content to the visual templates. Now, it's hard to proceed with reusability and distribute content outside of the website. The business manager responsible for the CMS believes they have over-structured the content because it's aligned directly with how templates are created and delivered. The firm is looking at how to use content for different distribution channels. They have a framework that dictates visual elements for the site, but determining how the designs will be implemented is a challenge.

## Lesson 5: Know that regulatory environments are twice as complex

When working in regulated organizations or regulated industries, companies have the added burden of needing to understand the nuances of regulatory requirements. In most organizations, there's a balance between the organization's appetite for risk versus the regulators' desire to slap repeat offenders down. Compliance becomes essential and makes implementations much more complex than in non-regulated industries. The key is to always keep this intense focus on compliance in mind and factor it in when service providers, vendors and others provide time or budget estimates.

For example, one of the financial services companies that we interviewed was required to comply with the Payment Card Industry Data Security Standard, otherwise known as PCI.<sup>3</sup> Compliance with the standard made the CMS deployment more complex and more time-consuming than it would have otherwise been, and backlog issues became challenging to manage. At one point, the CMS project team manager had a backlog list of 200 items but could only get 80 done. In this environment it was imperative for him to know the priorities and where the budget line was drawn.

Eventually, the project team established a committee comprising eighteen people, with some of the individuals focused on liaising with other groups in the organization and other individuals focused more on the project team and decisions internal to the project. Ultimately, the committee owned the CMS budget, the timeline and the priorities — and reviewed them often to reprioritize based on business requirements and technical issues. Doing this against the backdrop of regulatory compliance made the project more difficult.

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“ When working in a regulated space, you have to integrate with regulatory systems; retention, monitoring, and many other systems. There are more gotcha's in regulated than non-regulated because of what you have to keep and monitor — it's all about compliance, compliance, compliance! ”

- Senior CMS project manager, large bank

## Lesson 6: Recognize the importance of organizational change management

Many of the firms we interviewed mentioned organizational change management as a key element in creating a successful project. For example, take this CPG firm, which was rolling out a centralized site. The new system will not be mandatory, but the company hopes they have built in enough appealing features and capabilities to attract and persuade local sites to become involved. As they moved through this initiative, the executive in charge realized that global management needed organizational change management. Why? She believes it is critically important to identify the change management practitioners in the organization that the project team can tap into. She's also considering bringing in external change management practitioners from large and specialty consulting firms in addition to their in-house resources from IT.

Often, effective change management boils down to frequent and consistent communication. Interestingly, one large enterprise found that communicating outward, downward and upward improved the acceptance and support for its complex CMS implementation. The CMS team had engagements with individual stakeholders that started out as interviews, and then led to roadshows that got people involved in setting priorities. This successful "stealth" change management technique helped the team put together a comprehensive description of the project approach. The team also used the business requirements interview data — detailing how content is used and by whom — to get stakeholder buy-in for decision-making purposes. The project manager believes that the overall process helped the project team plan the project approach and that collecting the user interview data helped the

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“ Understand what you want, get all the stakeholders involved, get it signed off, get total agreement so that later you don't have unhappy people. This is essential. Next, find people who can deliver against the needs, either internally or through partners. Then you measure their success against how well they met the requirements. ”

— CMS project manager, a European consulting firm

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team share the project's internal messaging and get business buy-in for decision making.

A government agency also emphasized the importance of organizational change management. The marketing manager responsible for the CMS project advised, “Take it one step at a time with people, understand what you are trying to do and the path for how to get there. A lot of people do everything at once, which is a mistake.” This agency used a methodical approach to implement in phases, allowing the organization to absorb changes gradually, without being overwhelmed. Their progression was over two years, starting with implementing the website for 1600 products. Within the next six months, they deployed personalization and then implemented campaign management, moving to a quarterly deployment pace. Finally, they added predictive personalization software. Throughout the deployment they used training as a way to gain buy-in and acceptance, involving a lot of people in making the decision-making process. They learned that training helps people not only



understand the system but also facilitates adoption and user buy-in, particularly if the CMS business user training is co-located rather than held separately in each business unit. Co-locating business users for training allowed them to informally coach and encourage one another as well as learn from one another.

Some firms used their CMS projects to spearhead digital transformation, making organizational change management a key part of the transformation effort. For instance, a large non-profit found itself in the midst of a strategic makeover, facing dwindling revenue and an aging customer base, while in the midst of the CMS rollout. Ultimately, the project team realized it had to confront the transformational aspect of the deployment, as well as getting the organization engaged, aligned with strategic marketing, and making the online experience more orchestrated and sustainable. If they had it to do over again, they would have spent more time during the strategy phase getting people up to speed on governance, content management strategy, digital transformation plans, expectation management and the transition plan. Plus, the steering committee needed higher competency or better training, and to

resolve some political tensions that were pervasive throughout the project. In hindsight, the senior VP of technology believes they should have gone directly to the board of directors to get better organizational change management.

### Lesson 7: Use a service provider, but don't expect a guarantee

Almost all of the companies we interviewed used a service provider to help with vendor selection and project implementation. Service providers offer many advantages, including experience developing applications on new products and platforms, as well as knowledge about how to implement large scale projects involving centralized and distributed systems, including globalization and localization. Several project managers we talked with believed that their partners' involvement ensured success. But a couple of companies felt their service provider let them down. Some possible areas of caution include:

- **Understanding the project management methodology** for how the service provider intends to hand off the project from the discovery team to the development team.

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“ The biggest problem with our service provider was constant staff turnover. The account exec changed, and then that person changed too. Project managers changed multiple times. our RFP stipulated that team members couldn't change, but there was no way to make them stay. The project had some false starts, going in wrong directions. We went over budget, and the project is viewed internally as having mixed results. ”

- CMS project manager, global medical technology company

- Discussing the risk of unanticipated turnover in service provider staff, including project managers, and how this would be dealt with if needed.
- Reviewing the service provider’s plan for having staff work onsite, alongside internal project team members, to help with knowledge transfer, versus having staff work off-site.
- Determining the development partner’s capabilities. For example, many of them prefer and have strong resources in .NET development. There may be a mismatch if the solution is Java based. Fortunately, more people now know Java, and resources and expertise are not the problems they once were.

“ We selected not just a digital marketer, but a digital partner. ”

– Marketing manager, global brand

One company we interviewed has put a lot of thought into how it engages with digital agencies. The four-step process they developed (shown in Figure 3) involves putting clear steps in place for communicating with service providers, managing and mitigating risk, and communicating delays.

Figure 2.

### A Four-step Checklist for Working with Agencies



# The Lazarus Project: How CMS Was Brought Back to Life

Our interviews spotlighted a number of companies that first experienced failures to ultimately get to success. In some cases the failures were small in scale, but in a few situations the failures were enormous and there are many valuable lessons to be learned. The best example we encountered of an organization that failed on a spectacularly large level only to succeed in the end is that of a health and science university. We call this the Lazarus effect because the project was given up for dead, only to come back to life three years later and eventually become a big success.

First, the basics. The project began about eight years ago. Today, the organization has about 27,000 pages on the CMS public site, with just over 500 content contributors and 250 unique business units represented on the site. The decentralized site operates somewhat independently. For example, the hospital has a website, the web service group has a website, but all sites have the same look and feel. In the beginning of the project, the initiative was described as a unified site for academics, health care, and outreach. Everything was to follow the same content strategy principles. Unfortunately, it took two tries to implement the CMS.

The first time around, the many business stakeholders, the web team and IT were on different timelines, making it difficult to get content prepared. Some business groups were ready to go, some were not, and some overanxious groups put up temporary sites while they were waiting. The CMS team, which was tiny at 2.5 people, did not have a strong working relationship with IT. They operated on the classic “throw things over the wall” principle. The CMS team would file project requests with IT, but IT didn’t understand the system because websites were relatively new and they were not web engineers. As

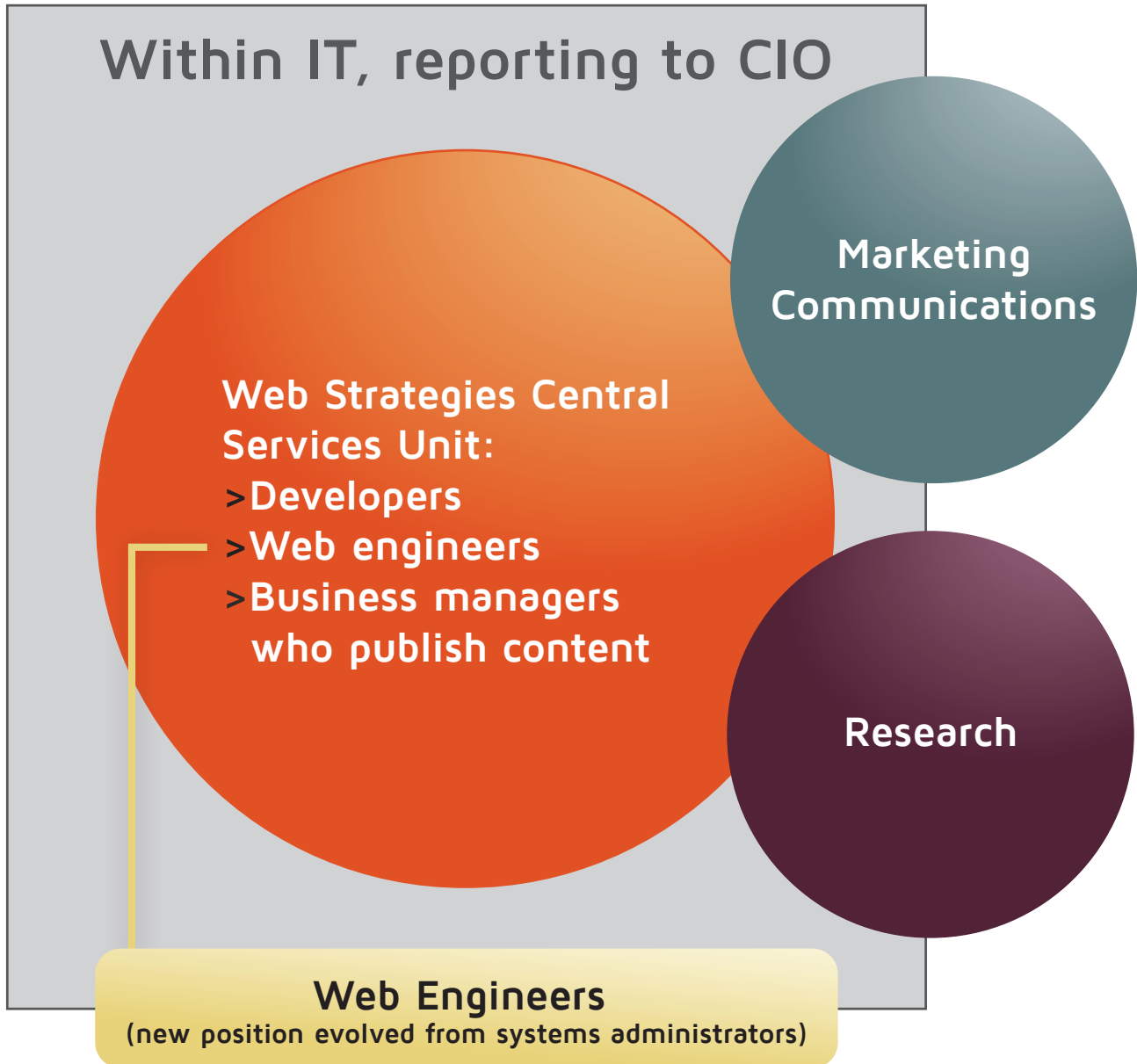
could be expected, the results turned out poorly until much later when the CMS team added its own technical resources. And the CMS team didn’t understand the full implications of the project. As the project manager now says, “A CMS overhauls the organization, and if you don’t have someone there to educate, train, and bring people along, it doesn’t go well.”

Eventually, everyone working on the project quit in frustration. There was no one left internally who was focused on the CMS initiative. The web service manager left and went to a digital agency. The project waited in abeyance, until a new sponsor could be located and a project team could be formed. After a lengthy hiatus, the project was resurrected three years later when the organization hired the former employee’s digital agency to help with the CMS implementation. The former manager returned in the new contractor capacity, and was eventually rehired by the organization after the entire CMS project team was given an overhaul and placed within IT, reporting to the CIO. (See Figure 4)


The new CMS team became the “web strategies” central services unit for the enterprise (see Figure 5). Developers, web engineers, and business managers for employees who publish content were organized into a single group that also has close relationships with marketing communications and research. They created new positions, called “web engineers,” that evolved from systems administrators specifically trained for the application. A local agency did a whole review of the environment — including a look at policies, practices, and infrastructure — and created a 5-year plan.

Figure 4.

## The CMS Team that Brought the Lazarus Project Back to Life







Through this project's death and resurrection, the CMS manager has seen many ideas succeed and fail. Her best advice and lessons learned for others includes (see Figure 5):

1. For managers, there's no such thing as too much planning. CMS projects need a very thorough discovery and requirements analysis phase, which can take up to six months.
2. Use a services provider to help with the CMS selection. This CMS manager recommends that project teams not involve a services vendor at the beginning. Instead, she advises waiting until discovery is over, and then selecting a services vendor. Once they get up to speed, have them help select the CMS vendor. Overall, she believes it's much better to rely on an expert's understanding than to try and learn it yourself. (Note, many experienced CMS managers would also recommend getting a service provider involved in the discovery phase.)
3. Network with others to learn from them. This manager believes it is important to learn from other organizations through networking and training opportunities. An agency has put the CMS manager into contact with about 20-30 other CMS professionals.
4. Create an integrated team that is largely responsible for the initiative. This organization muddled through implementation, but over time, developed a very strong internal team with very strong web engineers. Ultimately, the integrated team got them over the hump and has kept the project going.
5. Get that integrated team invested in the product selection. The process goes better if stakeholders have been involved. In this case, the services provider led the vendor selection, but business stakeholders and the CMS project team members were also involved in the discovery and selection process.
6. Form an internal customer advisory panel comprising employees from across the organization. This approach worked well for this organization's intranet project, and in hindsight the project manager thinks it would have worked well for the public-facing site. Their internal customer advisory panels host internal blogs and hold Q&A sessions and drop-in sessions. They also sponsor meetings throughout the organization, and work as evangelists, which helps build organizational change management
7. Form a relationship with the CMS vendor and build a partnership. This organization has built a strong relationship with its service provider. The project team is trying to build a partnership with their vendor, but hasn't succeeded yet. One possible reason why it has been difficult to form a partnership is that the selected CMS vendor is quite small.
8. Develop a digital strategy document as a guiding principal. With a strategy document, everyone is on the same page, everyone knows where the organization is headed.



Figure 5.

### One CMS Leader's 8-Step Approach for Success

-  Don't underestimate the need for planning. **STEP 1**
-  Don't pick a vendor at the beginning, use a services partner. **STEP 2**
-  Network with others to learn. **STEP 3**
-  Create an integrated team. **STEP 4**
-  Use a digital strategy document as a guiding principle. **STEP 5**
-  Get the team invested in the product selection. **STEP 6**
-  Form a customer advisory panel. **STEP 7**
-  Build a partnership with the WCM vendor. **STEP 8**



# Endnotes

1. For the results of a research report examining the lessons learned in CMS selections, see the “Five Crucial Lessons Learned in Content Management System Selections,” <http://www.digitalclaritygroup.com/five-crucial-lessons-learned-in-content-management-system-selections/>
2. This approach, known as “Managing Successful Programmes” methodology is advocated by the UK Office of Government Commerce. See <https://www.gov.uk/government/publications/best-management-practice-portfolio>
3. This requirement involved adherence to a proprietary information security standard for organizations that handle credit cards from the major card companies including Visa, MasterCard, American Express, and Discover.



# About DCG

## Digital Clarity Group

Digital Clarity Group is a research-based advisory firm focused on the content, technologies, and practices that drive world-class customer experience. Global organizations depend on our insight, reports, and consulting services to help them turn digital disruption into digital advantage. As analysts, we cover the customer experience management (CEM) footprint – those organizational capabilities and competencies that impact the experience delivered to customers and prospects. In our view, the CEM footprint overlays content management, marketing automation, e-commerce, social media management, collaboration, customer relationship management, localization, business process management, analytics, and search. As consultants, we believe that education and advice leading to successful CEM is only possible by actively engaging with all participants in the CEM solutions ecosystem. In keeping with this philosophy, we work with enterprise adopters of CEM solutions, technology vendors that develop and market CEM systems and tools, and service providers who implement solutions, including systems integrators and digital agencies. For more information about DCG, visit [www.digitalclaritygroup.com](http://www.digitalclaritygroup.com) or email [info@digitalclaritygroup.com](mailto:info@digitalclaritygroup.com).

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