2013 White Paper

How to Select a Web CMS Integration Partner

Falcon-Software

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INTRODUCTION

One of the most important business decisions you will make for your organization is deciding which company will build your new CMS based website. Not only are you likely to be allocating a budget north of $100,000+ to the project, you will also enter into what should ideally be a long and mutually beneficial business relationship.

This whitepaper will attempt to provide enough insight into the partner selection process to give you a head start in developing a comprehensive evaluation plan. It is likely that during your evaluation and discovery, you will be required to select between several vendors and related partner firms. The necessity to 'cut' vendors along the way is never easy.

You will need to establish which company has your best interests at heart combined with their technical proficiency and experience. To do this, a strategic and thoughtful process will need to be carried out on behalf of your entire organization in search of that 'Best Fit' CMS Integration Team.

OUR EXPERIENCE FOR YOUR BENEFIT

Our experience gives us a unique advantage, having been the recipient of some returning opportunities previously deemed 'lost'. These clients initially elected to award their project to the lowest bid only to contact us shortly thereafter requesting to restart the development process. Unfortunately, a great deal of financial losses can occur in a situation like this and so we hope that by referencing the feedback in these pages, you will never find yourself in a situation where you are second guessing your integration partner decision.

We will be discussing the following elements of the selection process:

- Getting partner feedback from your CMS Vendor
- What you need to know about the organization
- Their experience with the vendor and your particular market
- Paying attention to the frequency and quality of communication
- Staff experience and developer certifications
- Training plans and availability
- Comprehensive support plan for short and long term
- Dissecting the meaningful pieces of the proposal submission
- References and customer feedback

If at any time you feel you would like some additional information please **contact us** and we would be happy to answer any of your related questions.

EVALUATING A PROSPECTIVE INTEGRATION PARTNER

Evaluating an integration partner can be a very stressful and time consuming process. It is also extremely rewarding and beneficial when you finally make that final informed decision based on weeks of research and dialogue. Below we list several of the most important aspects to ensuring that you make the correct decision on the first go around.

Most importantly is that this decision should not be overly influenced by the dollar value of the CMS development quote, but by the ability of the prospect to proactively learn about your unique needs and to display a genuine and personal desire to enter into a long term business relationship.

GETTING PAST THE BOILER PLATE QUESTIONS

If you are able to get feedback from the vendor regarding integration partners, then you will have a head start on validating an appropriate development team. However this won't always be the case so you will naturally want to run through some of the obligatory evaluation steps to locating a Website Development company with the right mixture of services and experience to fit your needs. Several early stage steps include:

- **How did you find the Company** (search, referral, word of mouth, social media or testimonial)? Each of these can indicate fluency with a certain marketing strategy such as Search Engine Optimization or Social Media Marketing.

- **Did you like their company website**? Clearly, their own internet property needs to demonstrate their design, user experience and website architecture abilities. These need to all be intuitively tied together for you to consider them.
- **Social Media Presence**. If you're considering a Social Media marketing initiative and the company is advertising Social Marketing as a service, have a look through their networks as part of your research. You can learn a lot about the company this way. Is there more than one person contributing? Do the staff engage with their social communities?
- **Vendor Portfolio –** Is their portfolio diverse. Do they incorporate variation in their design and user experiences across the websites? This is an indication that they can adapt to new design concepts and ideas for each new project.
- **Plenty of Testimonials** – An abundance of quoted testimonials shows a consistent ability to work through the ups and downs of many projects and leave clients completely satisfied with their finished web presence.

ASK YOUR CMS PLATFORM VENDOR

An invaluable resource for quality referrals is the software vendor. The vendor is likely to have a very well established Integrator / Partner program which will maintain a list of highly qualified companies complete with certified developers and project managers. You can be fairly certain that the Web CMS software vendors maintain a highly qualified and up to date list.

Still, this doesn't mean you should drop your guard. While it's assumed that vendors keep a close eye on their integration partners, you just never know, and it's still wise to continue on with the evaluation process.

ABOUT THE COMPANY

You'll need to do your due diligence on the company and background, however there are a few points that you may not have thought of during the first wave of fact finding.

Liability and Warranty – Many companies will carry professional liability insurance against a catastrophic event, also known as 'errors and omissions (E&O). While not essential, it is a legislated requirement in certain regions so it pays to know that the company is compliant.

Warranty – Companies may also provide a limited time warranty on the work performed. Provided it's within scope and related to pre-defined functionality, the integrator may elect to provide complimentary bug fixes on issues that may not have uncovered themselves during the development QC. In some cases only a live production environment can appropriately stress test certain features. It never hurts to ask about their warranty policies.

Longevity – A company's longevity will be an indication of their ability to provide consistent, quality work and be successful at it. A company with experience will have a significant advantage given that they will have developed a larger portfolio of similar projects built on your chosen CMS Platform. Still, even with that, a newer company may have all of the technical and creative talent to deliver a cutting edge product. These 'new kids on the block' will just need a few more reference projects and companies for you to connect with prior to the short listing process.

Staff Turnaround – A possible warning signal could be related to staff turnaround. This might potentially highlight an unfortunate working environment where morale may be struggling and so your project will suffer. Spend a short time on LinkedIn and research the company staff, past and present. Companies with many long term staff will be more conducive to a positive work environment which will help the project to progress in a pleasant and orderly manner.

COMMUNICATION

You will come to learn about their ability to communicate and understand your business requirements most succinctly during the RFP period. The RFP part of the procurement process exposes those companies that display a genuine desire to learn about you and your organization.

Do they ask the right questions? – Questions need to be asked. No RFP will cover all of the possible scenarios, server environments or CMS features and options available. Depending on who developed the RFP, there may be holes in the technical requirements or in the feature/design elements. The implementer needs to go beyond the standard, scripted questions and make very specific inquiries into your interdepartmental needs and how you intend on interacting with the website. An experienced integrator may also provide additional suggestions based on your initial feature list which would be complimentary to what you are trying to achieve.

A few questions that may spark additional conversation could include:

- **What are the mitigating factors that moved you to initiate this new project?**
- **Does your strategic plan involve a 'mobile first' philosophy?**

- **Are you familiar with the difference between a 'Responsive' based website and a dedicated Mobile (Smartphone) option?**
- **Are you familiar with the Software's content personalization features and would you consider implementing or learning about them?**
- **Does your strategic plan involve social media integration and/or would you like assistance developing one in order to share your site's content and encourage engagement?**
- **Are 'social connect' features something that you would like to learn more about?**

Do they really understand the project and needs? – This is a critical part of gauging the implementer's attention to detail. This will most likely be evident in the Response quote based on the RFP. Questions above such as, 'what made to decide on this project' are smart and will show a pro-active desire to learn about the specific pain points which drove this decision. Based on your responses, the integrator is able to make suggestions based on previous projects as well as having gained a more concise strategic understanding of the project.

What is the makeup of the project team? – Project team composition can vary but at a bare minimum you should have access to a dedicated Project Manager (PM) who will be your primary point of contact (POC), a developer whom the PM communicates to directly and a creative designer (providing the design, user interface concept is all 'in scope'). Often organizations may also include a project co-coordinator. Their role is to step in as the point of contact and communicates to all of the team members including the PM. Essentially; you are looking to see what level of resourcing the company is committing to your project.

Timeline – This can be much more complicated that it sounds. The company needs to clearly indicate that it can meet the development timeline of your project. And that is has enough internal resources available to complete all of the intermediary tasks involved in delivering the project on time and on budget. Additionally, they should have a contingency in order to scale up production in order to chase a timeline that might be drifting away slightly.

STAFF EXPERIENCE & CERTIFICATIONS

A LITTLE BIT ABOUT THE PROJECT MANAGER (PM)

The PM will generally be your primary point of contact (POC). They ensure that your project and development needs are being met while tracking against costs. More so, they direct focus on your project, managing the production schedule for your project so that the development tasks are allotted the appropriate developer and designer time alongside other parallel projects that the integrator may be building.

HOME GROWN TALENT AND EXPERTISE

Ask straight out and early whether they **outsource any of their work**. Generally you might want to determine whether any outsourcing is 'overseas' which could undermine the quality of your finished product. Further it's an indication that the firm you are investigating may not have all of the necessary skills required to deliver the best possible product to you.

Some firms may partner with an SEO firm or a Marketing Firm and so you will need to continue the research down the provider channel to ensure that 'these' partners don't, in turn, outsource their services. This is particularly risky with SEO, where low quality work can lead to Google penalties or worse.

Vendor Certifications and Experience

Generally, developer certification is a pre-requisite to official vendor partnerships, so this is often just a formality. However you would be advised to follow up to ensure everything is up to date and that the team is certified for the CMS version that you are evaluating for your website. Significant changes in architecture, features and methodology can occur between major versions. This also demonstrates their commitment to the vendor and their desire to maintain very high standards of internal training and certification.

Experience will be evident with the volume of projects developed using the particular CMS platform. As before, watch for diversity and market. Watch how the visual experience changes between an Intranet project and commerce based solution. Feel free to ask about other projects. Often, companies will only feature their marquee projects and many more can be offered up as examples of their work. See how the designs have changed over time. Again, this indicates a commitment to a progressive and evolving design and development strategy.

CMS Training

Administrator & Editor Training

Generally, administrator and editor training are one in the same, however depending on your organizational structure you may require multiple editor levels in order to manage governance and workflow. In this case it's very important that your most senior content administrator has enough training and understanding of the CMS's workings that they can in turn train internal staff. This is sometimes referred to as 'Training the Trainer'.

The integrator will most commonly offer admin training in house. This service is likely to be additional so be sure to factor that into your project budget. Also, inquire as to the possibility of an 'on-site' training session (multi-day), and what the additional costs would be there. Expect to cover all of the traveling expenses of the training individual or team. Again, confirm who is involved and how the training sessions are structured and managed.

The software vendors will also likely provide administrative training; however, the integrator may be certified to provide this service.

If this is the case, we would recommend this option as their presentation is likely to be much more personable and they will usually train you directly on your development website installation! This will provide you and your team with immediately valuable insight and direction for real world content management.

Developer Training

On the other hand, developer training is exceptionally technical and specialized. Don't expect many integrators to offer this service and instead look to the vendors themselves.

Realistically, we generally don't see many organizations signing on for developer training except for the more enterprise level companies with a full IT department at their disposal.

SUPPORT & MAINTENANCE

Support and Maintenance services can vary dramatically depending on the particular hosting setup. For instance, the implementing company may have bundled server hosting with your CMS development and so all hosting related questions will funnel directly to them. Outages, hardware upgrades, server architecture, software components, modules, etc., will all be handled by the hosting firm. Even if the integrator uses a 3rd party hosting partner (falls under outsourcing!), they will still be your primary contact which is ideal and simple. They will then contact the upstream provider on your behalf but not on your nickel.

The maintenance elements will fall under a post production agreement with the integrating company. Hopefully you've had a positive and educating experience, having developed a good working relationship with your PM and production team. Now with the full confidence of your internal board and stakeholders, you can freely sign on for extended support and maintenance services. Depending on the structure, you are likely to agree to a monthly sum of hours (with roll over) or simply an 'as needed' agreement. It's most common to consume a fair bit of resources in the months following the release and then see a tapering off of need as you and your website settle in to a stable and productive flow.

THE PROPOSAL

The proposal will provide the first glimpse into the overall workings of the integrator. You may have several proposals to look at which will give you a very good understanding of the different levels of maturity and professionalism.

This will leave a strong impression with you as they attempt to summarize your whole vision and provide a comprehensive quote on the top to bottom production.

Proposals will differ dramatically, however you will want to pay most attention to the following components as they will demonstrate their ability to ask meaningful production question and to appropriately disseminate them into a clear and comprehensive production plan.

A STATEMENT OF UNDERSTANDING

Some integrators will include a section of their RFP that details their understanding of the project based on the period of discovery prior to submitting their proposal. The statement should clearly define the high level requirements specific to your project and can be as detailed as necessary. It's important that the summary here is very specific and speaks to your project 'pain points', thus demonstrating an ability to listen and understand the challenges that have led to your decision to take this direction.

COST ANALYSIS AND TIMELINE

It is likely that you, as with many other prospective clients, will skip directly to the sticker price. The integrator should also know this and so the cost analysis should be clearly defined and meaningful. There should be a logical categorization of the phases of the project and the costs associated with each phase.

Each phase should also have a timeframe associated with it. The timeline will compile the time resources needed to complete the project. It is generally measured in weeks or days. An example of phase breakdown could look something like this:

Example Timeline Overview

- Discovery / Requirements Gathering
    - **1 – 2 Weeks**
- Server Architecture Strategic Planning, Setup and Deployment
    - Setting up development interfaces
    - Installing core CMS
    - Etc.
        - **2 – 3 Weeks**
- Design Concept and User Interface Development
    - **2 – 4 Weeks**
- CMS Feature Development, Customization and Integration
    - This would also include setting up all the features such as the core templates, blog features, social media features, site search and all other specific features related to functionality
        - **8 – 12 Weeks**
- Unit Testing, Quality Control
    - **2 – 3 Weeks**
- Project Release
    - **1 – 2 Weeks**

*Note that timelines can vary dramatically from project to project and may change after more detailed requirements are defined.

Several optional services may also be featured here which likely are not part of the main quote. These could include SEO and Social Media services, CMS Training services, hosting options, content migration, etc.

Project Plan and Methodology

Integrators will also need to demonstrate how they plan to deploy the project from start to finish. There is a lot of pressure on the PM to maintain control of the production schedule and communicate often as to the current status of the development.

The project plan will establish the schedule of communication and a timeline (A Gantt chart is common here). The plan needs to be realistic and the timeline achievable.

An important consideration with any project is to understand that updates to production and scope often occur during the requirements gathering phase. The implementer can only learn so much about the nuances of your project and many unforeseen variables can manifest themselves during the true discovery process. Prepare for slight variations in the scope, timeline and budget. This is generally accepted understanding but it's important to know and be somewhat prepared.

References

No single resource is going to give you the most accurate review of the implementing company than their own clients. Client references should be mandatory and freely offered. Also client references using other CMS platforms will also be valuable as a review of their production methodology, communication standards and general behavior towards their clients.

For something a little out of the box, consider contacting past clients that are not on their reference list. For instance case study or portfolio listed clients. It generally won't take long to locate the marketing manager or production coordinator that facilitated their new CMS.

And as we know, the 'approved' references have been vetted by the company and are guaranteed to give glowing reports.

Information that is 'not so glowing' can also provide a positive spin in the end. For instance, if the project started to go a little 'sideways' what was the root cause (scope creep, client delayed decision making, slow content migration) and how did the integrator attempt to alleviate the issue at hand. The ability to diffuse a volatile situation is a commendable trait and one that can help to develop a respectful, long term business partnership.

CASE STUDIES

Case studies, when delivered correctly, are another excellent resource for demonstrating an ability to problem solve with strategy and design.

Case studies should have a clearly defined 'before and after' synopsis. Why the client approached the integrator, what were the main pain points, how did the integrator answer these points and what was the finished solution? How long ago was the implementation?

And of course, feel free to contact the management of the website and ask about their experience while building their new website.

The case studies really should read like a short story with a beginning, middle and end supported by before and after screenshots. Case study pages are rarely done perfectly and are often filled with fluffy, self-promoting content when they should be discussing the specific personas that were in play when the site was struggling. Then revisit these same personas with the new website and describe how their interaction has changed for the better.

TO THE VICTOR GO THE SPOILS

The search for the right CMS development company is a long and arduous task. And so it should be! The amount of money that will change hands should be an indication of the serious, in depth research and evaluation that is required and expected.

This is such an important decision that often an outside agency is asked to assist in the process. Similarly to selecting the CMS product, a 'best fit' integrator is equally important in the long term viability of the project. Only the most highly qualified, experienced yet personable and pleasant organization will reach the final negotiation round table.

If there is a single take away from this document, it would be to really pay attention to the communication style of the integrators. Listen carefully to what they ask you and how they respond to your questions. Be certain that they are legitimately interested in building the perfect platform for you and in the process will ask very specific questions related to your early requirements. The good ones will also make suggestions early or provide meaningful advice well in advance of any decision making. An apparent obsession over budget may indicate a lopsided motivation on the part of the developer.

We hope you have found some helpful advice in these pages and wish you the best of luck in your selection process.

About Falcon-Software

Falcon-Software has extensive CMS integration and vendor partner development experience covering SMB to Enterprise installations. We continually consult with industry experts and can also refer consultants to assist in your CMS Selection needs. Our production team has been instrumental in planning and developing large Content Management and Enterprise Intranet solutions for many Fortune 500 companies.

Please feel free to contact us directly if you wish to learn more about how we can help you with your new project.

Falcon-Software has deployed hundreds of web content management projects using the leading .NET web content management solutions - Ektron, Elcom, Kentico, SharePoint, Sitecore and Sitefinity.

Our Specialized Web CMS Services

With offices in Dallas, Seattle, Toronto and Victoria, Falcon-Software has been offering a unique combination of e-business strategy, creative web design and Web CMS application expertise when developing feature-rich website solutions for organizations worldwide since 1993.

- CMS Websites, Intranets & Extranets
- Content Audit & Analysis
- Content Migration Services
- Legacy Application Assessment
- Custom CMS Applications
- Pre-Built Application Modules
- Software Integration Services
- Multilingual CMS Globalization
- CMS Hosting Services
- Online & On-Site CMS Training
- Social & Mobile Integration

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