

# Implementing content management for web sites, intranets and extranets

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# Agenda

- Why use a CMS?
- What does a CMS do?
- What are the technical options?
- How do we go about selecting a CMS?
- Do we need a search engine?
- What are the risks?
- Where can we get more information?

# Business drivers for a CMS

- Web sites and intranets now becoming business-critical applications
- Reductions in staff levels throughout the organisation – more to do with fewer staff
- “Webmaster” centralised publishing model does not scale for intranets
- Changes in business requirements take too long to be implemented when using the “FrontPage” flat-file approach
- The same content may need to be published to a web site, intranet and extranet but in different styles and for different purposes
- Other applications need to be integrated into an intranet or web site

# Content management software

- The key elements of a CMS application are
  - Content creation through templates, which require no technical expertise
  - Content review supported by work-flow
  - Content versioning closely managed
  - Internal and external hyperlinks can be managed
  - Content tagged and held in a repository
  - Content repurposed for delivery to specific audiences
  - Site design framework independent of content structure
  - Comprehensive administration functions



DialogServer

- System Administration
- System Repository
- PM Test
  - Administration
  - Customer Management
  - Building Blocks Management
    - component templates
    - DTDs
    - jep's workflow and format area test components
    - mark's components
    - page templates
  - pages
  - Users
  - Workflow Administration
  - User Work Items
- Primary master
- Richie master
- Richie slave
- UK Publication
- CH Publication
- MZO

### Edit Component

Properties Workflow Info

\* Title

\* DTD

\* Heading

\* Introduction

\* Summary

\* Body

**B I U** [List Bullets] [List Numbers] [List Discs] [List Squares] [List Triangles] [List Circles] [List Stars] [List Hearts] [List Diamonds] [List Squares] [List Triangles] [List Circles] [List Stars] [List Hearts] [List Diamonds]

Rich **content** editing, with [hyperlink](#) functions

- bullet 1
- bullet 2

# Content management – the benefits

- Facilitating re-use of information (at a “component” level) through effective integration from diverse sources
- Supporting multiple distribution channels without modification of the master document
- Enabling information maintenance to be devolved without compromising central control on quality and version
- Providing presentational consistency and change by separating content from design
- Facilitating the integration with other applications
- Reducing the levels of skill, training, support and staff time required to contribute content from existing business processes

# Central vs decentralised content

- Centralised (“Webmaster”)
  - Tight control on standards for layout
  - Able to use complex CMS
  - No buy-in from staff
  - Easy for issues over content priority to arise
- Totally decentralised
  - Speed of content contribution
  - Buy-in from staff to the organisation
  - CMS needs to support occasional contributors
  - Very difficult to maintain content quality
  - Content contribution may be treated as a hobby

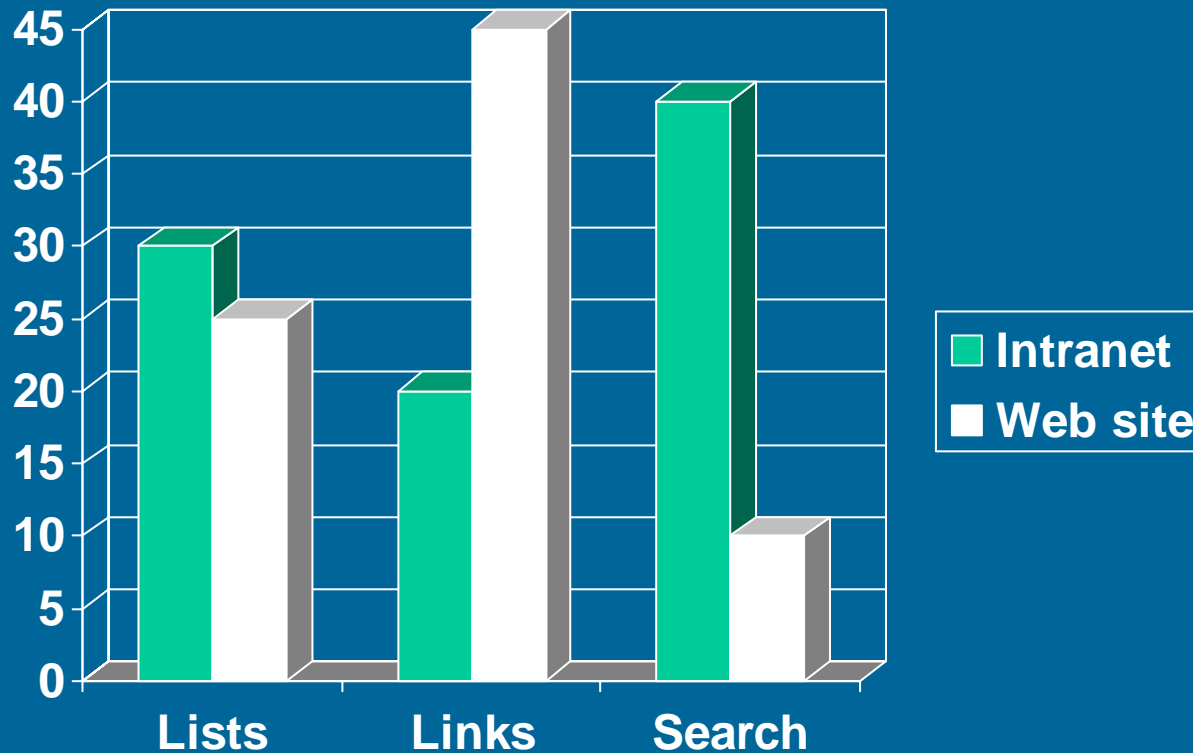
# Web sites and intranets

- Web site
  - Clear focus to justify investment
  - Web team adding content on a regular basis
  - Graphics rich
  - Public accessibility
  - Link management straightforward
  - Visitor/download metrics
  - Search not critical
- Intranets
  - Business case difficult to make in ROI terms
  - Employees adding content on an ad-hoc basis
  - Document rich
  - Confidentiality issues
  - Complex link management
  - Trust is the primary metric
  - Search crucial to effectiveness

# Content creation

- The more effort you put in to understanding how content will be created the better
- Differentiate between
  - Modifying existing content (e.g. a web page)
  - Creating new content through a text box
  - Creating content as a Word document to convert to HTML
  - Ease of use for regular vs irregular/periodic use
- Don't mis-use workflow. The role and workload of the reviewer is rarely taken into account
- Without metadata a CMS (and of course the search engine) will not be able to function effectively. What metadata will be added, and how?

# Access routes – Intranet vs web



# Technology options

- Open source
  - Not as cheap as it seems
- Out of the box
  - Quick start but not extensible
- Have it built by agency/software house/IT department
  - How will it be managed and enhanced?
- COTS (Commercial Off-The-Shelf)
  - Powerful and well supported, but can have hidden costs
- Document management
  - Not what it was built for

# CMS selection – some warnings!

- Selecting a CMS cannot be accomplished on the basis of
  - A review of product literature
  - A demonstration by a salesman
  - A recommendation from another organization
- It cannot be accomplished in a few weeks
- It cannot be procured by any one single department
- It is likely to be the only application since e-mail and Microsoft Office that is rolled out to every desktop (staff and visitor)
- From the first thought that a CMS might be useful to the full roll-out of the site could take 12 months – if everything goes according to plan
- This has some implications for budget management (which FY?) and resource allocation

# Selection process and schedule

- Develop the RFP (2 months)
  - Develop the vendor short list
  - Send out the RFP with realistic deadlines (2 months)
  - Invite 3-4 vendors to give a presentation (2 months)
  - Manage the presentation
  - Select one as “preferred vendor” but do not alienate the others!
  - Visit reference sites (1 month)
  - Allow time and budget for a Scoping Study
  - Sign a contract (1 month)
  - Install (1 month)
  - Roll-out (3 months)
- Total elapsed time 12 months**

# Total Cost of Ownership

- On top of the initial licence cost will usually be
  - 20% for the cost for support in the first year of operation, billed at the outset
  - Search engine (Most CMS products do not contain a site search engine, just one that to access the CMS repository)
  - Specialised modules for blogs, collaboration etc
  - Training
  - Consulting a.k.a 'professional services'
  - Hardware and software platforms (eg SQLServer licences)
- The consulting costs can be 2 to 3 times the license cost.
- Open source CMS require skills that may not be readily available in the IT department

# Project management

- Unless the implementation process is managed as a project the chances of meeting expectations for release date, and staying within budget, are remote
- In most cases there will be too much work for the web team/intranet manager to do as well as maintain the current site(s)
- Implementing a CMS for an intranet in particular will affect every desk top and need good integration with other IT systems
- Few companies have either project management experience or staff with project management skills
- The management issues are magnified if a systems integrator is involved, especially if they do not have excellent lines of communication with the technical staff of the vendor

# Migration

- There will usually be a substantial number of pages from existing sites that need to be added to the new site.
- It is not just a question of transferring the content of the pages, but also adding and/or modifying metadata tags
- Each vendor has their own approach to this migration, and the extent to which the migration process can be automated depends very heavily on the quality of the current file/directory structures
- Migration issues need to be considered explicitly in the Scoping Study, but in the end there will be an unquantifiable amount of manual work involved in the migration process.
- Migration issues are the main reasons why CMS implementations over-run and/or fail to meet expectations

# CMS – ten critical success factors

- Adequate preparation is essential
- Treat selection and implementation as projects
- Write the specification in terms of business requirements
- Identify and manage the risks
- Understand the expectations of content authors
- Understand the total cost of implementation
- Take care over vendor selection
- Do not rush the implementation
- Migration issues need particular attention
- Manage expectations and culture/process change

The fire of progress is lit by inspiration  
Fuelled by information  
And sustained by hope and hard work

# The book shelf

- Content Management Bible, Bob Boiko, Hungry Minds Inc. New York, 2004 (Second edition)
- Managing Enterprise Content. Ann Rockley. New Riders Publishing. 2003
- The Content Management Handbook. Martin White. Facet Publishing. 2005

# Web favourites

- [www.cmswatch.com](http://www.cmswatch.com)
- [www.cmsreview.com](http://www.cmsreview.com)
- [www.steptwo.com.au](http://www.steptwo.com.au)
- [www.cmprofessionals.org](http://www.cmprofessionals.org)
- [www.boxesandarrows.com](http://www.boxesandarrows.com)
- [www.intranetfocus.com](http://www.intranetfocus.com)
- [www.findability.org](http://www.findability.org)
- <http://iainstitute.org/>