

Content Management Systems Best Practices

1. **Make sure you define the benefits and goals of implementing a Content Management System (CMS).** There will be additional overhead in using and managing a CMS, including approval levels that did not exist formally before. However, there will be fewer instances of incorrect or broken code, the content can be migrated or rolled back more easily, and approval processes will ensure that content is not released too early or without approval.
2. **Tie CMS into key processes that run your business.** Using CMS workflows as the only way to push product or site content to the website will make sure the proper approvals were done.
3. **Don't let CMS hamper your ability to address emergencies.** Workflows are great for getting the right people to approve changes when they are made. However, sometimes an emergency requires fast action, so make sure you have a plan for when the approval process can't be followed (e.g., the manager is on a plane).
4. **Define CMS ownership.** Implementing CMS requires support from the entire team to design, implement, use and manage. Therefore, buy-in from all key stakeholders is needed to ensure their needs are met when the CMS is rolled out. Having them assist in the design up front will help ensure that the system is used consistently. Determining how to roll this system out to various groups in your company is needed to make sure that complete 'sections' of your content are in the new system; having partial content in the CMS will cause confusion and greatly reduce the effectiveness of the system.
5. **Define your goals and develop a supporting business strategy.** What are your goals in implementing CMS? You will need to define a strategy and process to use CMS to meet these goals. At a minimum, you should define approval processes and standards, what content should be maintained with each process, who does what, and you should coordinate ongoing improvement initiatives after initial implementation.
6. **Consider content workflows to add efficiencies and control.** Content management workflow tools can be effectively used to control content approval and facilitate streamlined operational flows to increase efficiencies.
7. **Define a complete set of requirements.** As with all systems, a complete set of requirements is needed. Unlike other systems, CMS systems reach many more groups within an organization; each will have their own needs. Gathering all of their requirements is critical.
8. **Create, monitor and maintain a set of standards.** Defining standards, category and information structure, naming conventions, content creation practices, etc., is usually needed for CMS implementations. Having these standards for CMS is critical as now there are defined content management processes. Standards help keep users in sync, facilitate content reuse, improve navigation and minimize training of new users.
9. **Try to implement in phases.** Implementing all groups at once may make the project take too long and cause you to lose focus. Identify the highest priority areas, support needs, and rollout the first phase in a few months.
10. **Monitor, manage and optimize during rollout and usage.** The four biggest hurdles are making sure CMS is used, is used uniformly, is used according to the processes and standards, and that the processes and standards are correct. CMS is a change to your teams' processes; seeing the benefits takes several months. Managers need to monitor adoption. Meeting with the key stakeholders on a regular basis can help you identify any changed needs and optimize the system, further building their investment in the tool and improving the likelihood for success. Having senior management buy-in is critical in cross functional CMS user environment.
11. **Define your content lifecycle.** Analyze your content lifecycle to determine when content can be removed and archived from the CMS. Having very old content on the system will make it more difficult for users to maintain their content and use the system. Ensure that content is still searchable, even though it's 'gone'.
12. **Create Performance Metrics.** The final step in using a CMS system is to prove that it is beneficial. Determining and reporting against performance metrics will help maintain the business case for using a CMS. Seeing performance improvements, cost reductions and reduced content issues will help uncertain stakeholders understand and see the benefits of a CMS.

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