

Tactical Guidelines for Getting Web Content Management Right This Time Around

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This research note highlights the typical challenges encountered in the selection, analysis and implementation of a Web content management (WCM) solution and outlines how they can be overcome. IT and business leaders that are considering improving their WCM solution should read this document to learn how WCM initiatives can yield the required results with lower costs, and an optimized time to value.

Key Findings

- Many organizations are still confused about which combination of products to select for their WCM solutions.
- Gartner estimates that 30% of WCM initiatives go over budget or do not achieve their goals because they don't adhere to established best practices.
- Economic uncertainty and the pressure to cut costs are leading to increased scrutiny of available WCM solutions and of their deployment.

Recommendations

- Identify, quantify and document the goals of your WCM solution.
- Utilize a maturity model to assess the level of change that your WCM solution will require.
- Establish a road map that spans the phased achievement of highest-priority goals and longer-term, strategic goals before you select the products for your WCM solution.
- Follow the best practices outlined in this document in addition to those more commonly adopted in the industry.

WHAT YOU NEED TO KNOW

The dot-com boom fueled the uptake of many technologies, and WCM was one of them. The urgency of the need to establish a Web presence and catch up with the industry left little room for strategic thinking and formalized, goal-oriented implementations. A mad rush to build Web sites quickly was favored over a more considered and thoughtful approach. Equally, the ability to modify content directly on a live system was favored over diligently establishing appropriate workflows and staging architectures. Unfortunately, this approach to WCM solutions inherently shortened their life spans, compromised their overall value and paved the way for tortuous migration efforts.

Interest in WCM is increasing once again. Following the mistakes made during the dot-com boom, "getting it right this time" may sound like a statement of hope, but it now carries a higher degree of predictable success. The guidelines summarized in this document comprise fundamental precepts that apply directly to WCM. They will help promote innovation, reduce costs, optimize time to value and ensure a greater business value for your WCM solution.

ANALYSIS

Introduction

Many organizations rushed to build Web sites during the dot-com boom and failed to follow best practices for implementing WCM. But WCM is making a comeback. A combination of technology consolidation, maturing standards and higher-quality products has led to renewed interest in WCM.

However, the economic slowdown in 2008 is leading to increased financial scrutiny of WCM initiatives. This compounds the myriad challenges — spanning from product selection to user acceptance — that still compromise many organizations' attempts to achieve the maximum return on their WCM solutions (see Note 1). In many cases, the challenges are actually preventing organizations from achieving the desired solution in the first place. Therefore, the focus is now on tackling these difficulties and making WCM perform to expectations. This document outlines the four basic steps that business leaders and Web content managers should take to ensure that they get their WCM strategy right this time.

Define the Business Goals

Your WCM initiative must begin with the identification of clearly defined measurable goals. These goals must emerge from cross-functional planning groups. Too many efforts begin with a list of requirements for the WCM solution, but these requirements cannot be defined accurately at such an early stage. The goals themselves will typically number between five and 10, and require agreement from all business units before you begin constructing shortlists of vendors. This will help you avoid lengthier discussions at an inappropriate stage of the WCM effort. The goals should be strategic in nature, reflecting your objectives over two or three years. They should be expressed in a form similar to the following:

- Consolidate x number of currently used Web platforms into one repository within two years.
- Increase revenue generated by the Web channel by x% within 1.5 years by introducing analytics functionality to the existing Web platform.

- Empower more than 80% of business units to manage their own content within a year by leveraging the more intuitive user interface of the Web solution.

The overall business goals should succinctly and quantitatively summarize the essence of the required WCM solution, and they should be linked to the overall strategy of your organization. They should also be clearly phrased so that the benefits are clearly understood and actively supported by the executive sponsors and stakeholders. These objectives will form the basis for all requirements of the WCM project and will be the tool that allows irrelevant features to be quickly identified. The benefits of this approach include:

- Faster shortlisting of suitable vendors.
- Reduced expenditure in the selection phase.
- Increased clarity about the solution components necessary for the appropriate solution.
- Greater project transparency and more support from high-level sponsors as a result.
- Easier building of business case for the initiative.
- Accurate listing of requirements at the RFP phase.

Apply a WCM Maturity Model

The adoption of maturity models is inhibited by the perception that they are abstract and theoretical, with little connection to the real world. Yet the appropriate maturity model can provide the basis for practical decisions, cost savings and the mitigation of many risks. A maturity model is a tabular representation of solution areas such as Web authoring, workflow or Web analytics, together with a rating of how "mature" or developed that solution area can be. A simple user interface with rudimentary tools would have a low rating, while a sophisticated, rich-text-editing, "what you see is what you get" environment based on XML would score higher. The model can therefore be used to assess the level of maturity a future WCM solution should have. It also assists in the articulation of a strategic vision and permits insight into the complexities of reaching that vision. For a more detailed discussion of a WCM maturity model, see "The Gartner Maturity Model for Web Content Management."

A complete and realistic evaluation of all aspects of your current WCM solution is necessary to assess the maturity level of your current system. Without this initial assessment you will be unable to determine what future levels of maturity are achievable, or how much effort is required to exact the corresponding changes. Such analyses also help to simplify make-or-buy decisions, and clarify whether the products on which your existing solution is based require upgrading or replacement. Benefits from applying maturity model analysis include:

- The creation of a succinct, easily communicable summary of status of the WCM solution to executive sponsorship and stakeholders.
- The ability to assess expected levels of change and adopt the appropriate change-management strategy.
- Availability of high-level budgetary guidance so that gross underestimations can be avoided.
- The provision of a framework for assessing all three Web domains: the Internet, intranet and extranet.

- The difficulty and cost of moving a WCM solution to the desired level can easily be underestimated. A maturity model helps expose these difficulties and costs, and provides valuable input to the design of another indispensable tool — the road map.

Build a Road Map to Promote Long-Term Success

A road map is a high-level representation of the planned changes against the chosen timeline for those changes. Road maps are commonly represented as Gantt charts, with the overall effort typically divided into overlapping phases. Each phase represents the changes required to raise the maturity of the WCM solution to a higher level on the maturity model. The complexity of the required change will determine whether multiple steps for a particular solution area are taken in any one phase. (A phase typically ranges from three to six months.) This approach helps mitigate the risks associated with lengthier endeavors, such as attrition of key staff and budget reallocation away from the project. For more information, see "How To Build Your Road Map for Web Content Management."

Use a road map-based approach to:

- Ensure that the order in which you deploy the WCM solution components matches the priorities of your overall business strategy.
- Help organization leaders avoid deploying short-sighted point solutions and silos. Easy wins can be considered, but not at the expense of higher-order goals.
- Permit a more thorough assessment of vendors and filter out those that can't support your vision of your solution.
- Allow a careful assessment of how long it will take for your WCM solution to provide business value.

Identify and Follow the Relevant Industry Best Practices

The rush to build Web sites during the dot-com boom led to the pervasive absence of key best practices. However, it is essential that you identify and follow industry best practices if you want to ensure project success. The following are examples of high-level imperatives as they apply to the selection, analysis and implementation of a WCM solution:

Choose a Solution-Deployment Methodology: WCM programs which diligently apply a project management office (PMO) and solution-deployment methodology have a significantly higher chance of succeeding. The methodology will provide focus, optimize time to value and help reduce potential risks. Discuss the most appropriate methodology with your vendor. The methodology that your organization primarily endorses may not provide the full benefits. An intelligent mix of your existing practices and those extolled by the vendor for its products is usually optimal.

Choose the Right Team: The right mix of staff will ensure that the right strategy and designs are established, that costs for core-development phases are reduced and that on-the-job training for in-house staff is provided (see "Best Practices: Building a Successful Enterprise Content Management Project Team").

Apply a Form of Requirements Tracing: Requirements tracing is a method by which the requirements of the individual phases are aligned with the goals identified and selected for that phase. This provides focus and helps ensure the exclusion of costly and unnecessary features. It can also prevent, or reduce, scope creep.

Collaborate With Your Vendor: Involve your main vendor in the selection of the appropriate products and the design of the WCM solution architecture. Some of these changes are likely to involve third-party products and will require a firm statement of compatibility from your main vendor. In some instances, a proof of concept in which the main vendor co-invests may be appropriate.

Tactical Guidelines

- Define the business goals for your WCM solution.
- Apply a maturity model to assess the level of change your WCM solution will require.
- Build a road map that identifies project phases and long-term goals before you select products for your WCM solution.
- Identify and follow the relevant industry best practices for selecting and implementing WCM solutions.

RECOMMENDED READING

"The Gartner Maturity Model for Web Content Management"

"How To Build Your Road Map for Web Content Management"

"Best Practices: Building a Successful Enterprise Content Management Project Team"

Note 1

Pitfalls to avoid in WCM projects

Primary causes of excessive deliberation and consequent budget overruns in WCM projects include:

- Disagreements while building a business case for the required investment.
- Poor selection criteria leading to difficulties in selecting a vendor.
- Difficulties in recognizing products to match the solution components.
- Business users rushing to install WCM products to gain short-term benefits.
- Failure to consider from the outset the three domains of a full WCM solution: the Internet, extranet and intranet.
- Underestimation of the importance of change management.
- Inconsistencies between the requirements cited in the RFP and those which govern the deployed solution.

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