

**Content Management RFP Template**

# A Sample Request for Proposal for Distribution to Potential Content Management Vendors

Content management Software (CMS) is as business critical for most organizations as a customer relationship management system (CRM), enterprise resource planning system (ERP), or any other key business application. Yet most organizations do not have an effective way to evaluate a CMS. The sheer number of CMS solutions on the market, the industry marketing hype and the wide range of use cases for CMS software complicate the selection process.

This guide is designed to help you document your business needs and primary use cases for a new CMS. It also provides an RFP response template you can distribute to potential vendors.

The document is separated into two parts.

* Use **Part I** to document your company's high-level business and operational requirements that help guide your shortlist selection of potential CMS providers. Included are several tables you can use during the RFP process (Shortlist selection list and interview checklist of selected potential vendors).
* Include **Part 2** in your RFP response package. It includes a spreadsheet outlining a range of questions you want to be answered about the proposed CMS's capabilities and architecture and a spreadsheet listing all required company information, including support and pricing details.

Like any template, you should review it carefully and customize it to fit your specific requirements to ensure you receive accurate and fitting responses.

We've been through many RFP request processes and can offer you some straightforward advice on how to get the information you need to make the best decision for you, so feel free to reach out; we'd love to chat.

In addition, here are a couple more resources that can help guide your CMS purchase decision-making process:

* [CMS Buyer's Guide](https://www.ingeniux.com/resources/web-cms-buyers-guide)
* [Intranet Buyer's Guide](https://www.ingeniux.com/resources/intranet-buyers-guide)

# Part I: Business & Operational Requirements

***Note:*** *This part is for internal use only to help you prepare for your RFP process.*

## Why do you need a (new) CMS?

You know you need to go through a CMS RFP selection process. But before we get to the Response Template, let's document some important information first.

You first need to understand that there is no best CMS on the market. There are dozens of content management platforms, each with its strengths and providing an optimal solution for some companies. Before starting your CMS selection process, you must be clear about your business and operational needs.

Here are several things you need to understand and document before you go any further:

### Business & Operational Goals & Objectives

Outline your organization's high-level business goals and objectives and what role your CMS can play in helping achieve them. Be sure to define goals and objectives across the organization, as many departments and teams, such as marketing, IT, finance, HR, communications, and lines of business, have specific goals a CMS can help achieve.

Most groups within a company develop roadmaps (or strategic plans) that outline their activities to help them achieve both their group's goals and objectives and the overall business goals and objectives. Mapping all these together enables you to outline the functional and technical capabilities required in the CMS and prioritize them by importance.

Ensure your objectives and goals follow the SMART model: Specific, Measurable, Actionable, Realistic, and Time-bound, or you won't know if your CMS can support them.

In addition to business goals and objectives, you also need to clearly outline any operational goals you want to achieve with this new CMS. Understand what goals are hindered by the existing environment, such as:

* Reducing the need for IT to make changes to the website or creating landing pages for marketing campaigns
* The need to be agile and make changes quickly and easily
* The ability to serve new channels and devices quickly
* Faster response times and support for expected higher traffic

Of all the goals and objectives you document during this part of the RFP selection process, note which needs are critical and, if not supported, would result in not selecting a particular CMS. For example, if your website experience must work on both desktop and mobile/tablet devices, then "The ability to serve new channels and devices quickly" is a critical need that must be supported. Another example is "must integrate with our Salesforce CRM platform."

## Key Use Cases

It's helpful to identify key use cases for your CMS based on your goals and objectives. For example, some common use cases include lead generation for marketing, brand awareness for marketing and corporate communications, an intranet for Human Resources, communities for customer advocacy or support, and so on.

Provide these use cases to your list of potential CMS vendors so they understand how you intend to leverage the CMS.

## Timetable and Budget Constraints

In your decision to enter the CMS RFP selection process, you have likely defined a budget you must work within and a rough idea of when you would like to see the new CMS implemented and live.

Share these expectations with the CMS vendors to help weed out those unable to meet these requirements.

**Supporting Resources:** In the section above, we covered high-level business and operational goals and objectives; to understand the CMS buyer's selection process, read: CMS Buyer's Guide.

## Supporting Tables for the RFP Process

To help select a shortlist and document the interview process for CMS vendors, here are a couple of tables you can use as is or adapt to your specific needs.

## RFP Selection Process Timetable

|  |  |  |
| --- | --- | --- |
|  | Date | Notes |
| Distribute RFP  |  |  |
| RFP Responses Due Date |  |  |
| Vendor Shortlist Identified |  |  |
| Vendor Shortlist Meetings/Demos |  |  |
| Vendor Shortlist Internal Evaluations |  |  |
| CMS Selection Decision |  |  |

## Potential CMS Vendor Listing

|  |  |  |
| --- | --- | --- |
| Vendor | RFP Requested | Response Submitted |
|  |  |  |
|  |  |  |
|  |  |  |
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|  |  |  |

## CMS Vendor Shortlist

|  |  |  |  |
| --- | --- | --- | --- |
| Vendor |  Product Name/Version | Response Submitted | Interview Date |
|  |  |  |  |
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## Vendor Shortlist- Highlights

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Current Offering | Vendor A | Vendor B | Vendor C | Vendor D |
| Creating & Editing Content |  |  |  |  |
| Metadata Management |  |  |  |  |
| Social Media/Blogs |  |  |  |  |
| SEO |  |  |  |  |
| Workflow/Governance |  |  |  |  |
| Navigation |  |  |  |  |
| Design/Templates |  |  |  |  |
| Multilingual Content Mgt |  |  |  |  |
| Roles/Users |  |  |  |  |
| Integration |  |  |  |  |
| Search |  |  |  |  |
| Implementation |  |  |  |  |
| System Requirements/Architecture |  |  |  |  |
| SaaS/Hosting |  |  |  |  |
| Service &Support |  |  |  |  |
| Pricing |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| Business Strategy |  |  |  |  |
| Service Strategy |  |  |  |  |
| Market Presence |  |  |  |  |
|  |  |  |  |  |
| On-Premises Pricing |  |  |  |  |
| SaaS Pricing |  |  |  |  |
| Support Pricing |  |  |  |  |
| Implementation Costs |  |  |  |  |

# Part 2: The RFP Template

Put this next section into a new document and provide it to all CMS vendors interested in submitting a response.

## Business and Operational Goals & Objectives

The following business and operational goals and objectives are key to our selection process. Please read them carefully. Where possible, your responses to specific questions should demonstrate how one or more of these goals and objectives can be reached using your solution.

### Business Goals & Objectives

<Outline Business Goals & Objectives>

### Operational Goals & Objectives

<Outline Operational Goals & Objectives>

### Critical Requirements

The CMS solution must meet the following critical requirements. Please do not respond to this RFP if it cannot meet these requirements.

In the table, please outline at a high level how your CMS solution meets each requirement.

|  |  |
| --- | --- |
| Critical Requirement | Vendor Response (keep responses to 200 words or less) |
| CR1 |  |
| CR2 |  |
| CR3 |  |

### RFP Selection Process Timetable

|  |  |
| --- | --- |
| Milestone | Date |
| Distribute RFP  |  |
| RFP Responses Due Date |  |
| Vendor Shortlist Identified |  |
| Vendor Shortlist Meetings/Demos |  |
| Vendor Shortlist Internal Evaluations |  |
| CMS Selection Decision |  |

## CMS Vendor Overview

The following sections help us understand your company, how it works, and your product roadmap. Please keep your responses to fewer than 500 words. Include links to more information if valuable.

Please provide the following information about your company

1. A short history of the company
2. Description of the company's products and services
3. Years In Business

### Understanding your Corporate Strategy

Please tell us about your company and corporate strategy to help us better decide if your company will be a good partner for us.

### Key Differentiators

Name 2-3 key differentiators that set your company and solution apart from other CMS solutions.

### Product Roadmap

What is the origin of the core technology offering covered by this RFP? For example, if the technology was acquired from a third party, provide a complete history of previous technology owners and code changes or integration that have occurred since acquiring the technology.

Please describe the current version of your CMS product and outline its direction. Indicate the length of time the product has been available for licensing by your company. Note any important dates within the next 3-5 years that will significantly affect your product's current architecture and functionality.

Provide a link to your existing product roadmap (if you provide one to customers).

### Vendor Experience and References

The successful vendor must demonstrate a proven ability to perform tasks successfully and to complete and deliver the features described in this RFP. <YOUR ORGANIZATION NAME> will determine vendor stability, adequacy of resources, staffing, products, and experience based on the bidder's proposal and references.

1. Please provide at least three customer references with similar use cases.
2. Provide at least three site references (URLs) showcasing your product's use.

## Use Cases

Below are key use cases for a CMS solution in our company. Please provide an overview of how your CMS supports these use cases. Keep your responses to fewer than 500 words. Provide links to relevant associated resources.

|  |  |
| --- | --- |
| Uses Case | Product's Ability to Support Use Case |
| UC#1 |  |
| UC#2 |  |
| UC#3 |  |

# Capabilities

The following sections outline capabilities and requirements related to CMS functionality and architecture. Please indicate if the identified capabilities are out of the box, require custom implementation services, or integration with a third-party solution.

Include screenshots where necessary to expand/clarify your response. Please limit your responses to the current version of the CMS. If identified functionality will be available in a later version, please note that but do not provide details.

|  |  |  |  |
| --- | --- | --- | --- |
| **Capabilities and Requirements** | **Out of the Box/Custom (Y/N)** | **Vendor Response** | **Our Notes** |
| **Creating & Editing Content** |  |  |  |
| Describe how content is created in your CMS, including rich text support (HTML & CSS style enforcing). |  |  |  |
| Does the CMS provide "in-context editing" using a WYSIWYG environment?  |  |  |  |
| Does the CMS support the creation of structured content?  |  |  |  |
| Is editing from Microsoft Word, Excel, and other Office productivity apps supported? How does the CMS deal with Microsoft-specific formatting? |  |  |  |
| Does the CMS support content preview for multiple display formats? E.g., desktop browser, mobile device, kiosk, etc.? |  |  |  |
| Does the CMS support creating and sharing assets such as images, videos, audio, documents, etc.? |  |  |  |
| Describe how authors search for reusable content. For example, does the CMS support viewing a list of reusable content in the content repository? |  |  |  |
| Does the CMS offer a built-in spell checker? Can custom or third-party dictionaries be added to the spell checker? |  |  |  |
| Does the CMS support importing content from other HTML editors, and does it recognize HTML formatting tags within text content types? |  |  |  |
| Describe the standard content management services available, including check-in, check-out, versioning, etc. |  |  |  |
| List the content types supported out of the box. For example, rich text, HTML, image, documents, plain text, video, etc...) |  |  |  |
| Does the CMS provide tools for creating and managing forms? Please describe. |  |  |  |
| Does the CMS automatically format images and other rich media based on pre-defined standards for resolution, size, and number of copies? |  |  |  |
| Does the CMS include pre-built functionality for querying content in databases? If yes, what databases are supported? Can non-technical contributors include database queries on content pages? Describe. |  |  |  |
| Does the CMS support the ability to insert content from third-party applications? Which ones? |  |  |  |
| Describe any other pre-built modules or functional components the CMS ships with. |  |  |  |
|  |  |  |  |
| **Metadata Management** |  |  |  |
| Can contributors edit metadata for a piece of content, including any structured information? |  |  |  |
| Does the CMS support both a controlled category list and an open-ended list of tags for website visitors? |  |  |  |
| Are categories and tags available to all site content, such as blog posts, landing pages, product pages, etc.? |  |  |  |
| Can content classifications, such as metadata, keywords, or explicit content identifiers, be used to search for content, build content listings, build content navigations and optimize content for search engines? |  |  |  |
| Is the schema.org taxonomy supported for metadata tagging? |  |  |  |
| Does the CMS apply metadata to images and other multimedia objects when uploaded? |  |  |  |
| Describe how your system stores and manages images and other multimedia objects. Can users associate metadata with images and multimedia objects?  |  |  |  |
| Describe how the CMS supports content indexing and cross-referencing through metadata, content keyword attributes, or explicit content identifiers. |  |  |  |
|  |  |  |  |
| **Social Media & Blogs** |  |  |  |
| Does the CMS provide blogging capabilities?  |  |  |  |
| Does the blog have an RSS feed?? |  |  |  |
| Describe the functionality available with the blogging feature (e.g., comments, comment moderation, social promotion, multiple authors, etc.) |  |  |  |
| Can blog content be used on other website content pages or in lists of page links? |  |  |  |
| Describe how the CMS displays external social site content. |  |  |  |
| Does the CMS have social sharing widgets? List & describe them. |  |  |  |
| What third-party social sharing tools does the CMS integrate with, and how? |  |  |  |
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| --- | --- | --- | --- |
| **Search Engine Optimization**  |  |  |  |
| Does the CMS provide a section for all contributors to enter SEO elements such as Page Title, Summary, keyword, etc.? Does the CMS identify missing critical SEO elements before a page/post is published? |  |  |  |
| Before publishing content, does the CMS analyze the content for SEO and notify the author of potential SEO issues? |  |  |  |
| Does the CMS offer keyword optimization features? Describe. |  |  |  |
| Before publishing, is content tested for broken links? |  |  |  |
| Describe how the CMS deals with URLs when content is moved or deleted.  |  |  |  |
|  |  |  |  |
| **Workflow and Governance** |  |  |  |
| Describe how workflows are created and edited within the CMS. Is there a user-friendly administrative interface for creating workflows? |  |  |  |
| Can access to different actions in a workflow step be assigned to different roles? |  |  |  |
| Can workflow be extended through scripted events or the product API? |  |  |  |
| Describe the notification process for workflows. Are notifications customizable? How do users track tasks and assignments with the CMS? |  |  |  |
| At what levels within the CMS can workflows be applied? I.e., Can they be applied at the page or content block level? |  |  |  |
| Can a reviewer attach notes to content items within the workflow?  |  |  |  |
| Does the CMS support scheduled publishing/unpublishing? |  |  |  |
| Does the CMS maintain a complete revision history/audit of all content/site changes, including who made the change? |  |  |  |
| Can older versions of content be promoted to the live website? |  |  |  |
| Does the CMS provide "red-lining" to view content changes and approve or reject previous drafts? |  |  |  |
| Does the CMS provide a workflow for out-of-date and expired content? Does it provide automated email notifications for content nearing its expiration date?  |  |  |  |
| Does the CMS support multiple workflows for a content type? Parallel workflows? Ad hoc workflows? |  |  |  |
| Can content be previewed within the context of the website prior to approving it? |  |  |  |
|  |  |  |  |
| **Navigation** |  |  |  |
| Does the CMS support automatically generated menus and navigation based on directory content? Can these menus/navigations be modified? |  |  |  |
| Does the CMS support a WYSIWYG environment for maintaining site navigation? |  |  |  |
| Describe the levels/types of menus that can be created with the CMS. |  |  |  |
| Does the CMS support the automatic creation of lists of pages based on tags, categories, etc.? Are these lists automatically updated as content is created and removed? |  |  |  |
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| --- | --- | --- | --- |
| **Design and Templates** |  |  |  |
| Does the CMS provide a visual page builder /template layout environment? Describe how it works. E.g., drag and drop, widgets, etc. |  |  |  |
| Describe the type of markup generated by the page builder. |  |  |  |
| Does the page builder support a responsive framework? Which ones? |  |  |  |
| Does the CMS provide responsive templates? |  |  |  |
| Does the CMS provide templates for mobile, tablets, and other channels? |  |  |  |
| Describe how design changes are applied to existing pages. |  |  |  |
| Does the CMS offer content preview to different channels/devices? |  |  |  |
| Does the CMS support the ability to import existing templates/website designs or model a website based on an existing design? |  |  |  |
| What technology/coding skills are used to create/edit templates/designs? |  |  |  |
|  |  |  |  |
| **Multilingual Content Management**  |  |  |  |
| Does the CMS support managing and publishing content in different languages? |  |  |  |
| Does the CMS connect to external translation systems? If so, which ones?  |  |  |  |
| Is the client software localized in other languages? If so, which ones? Can you add additional languages? |  |  |  |
| Does the CMS support a Locale system for defining and deploying language sets? |  |  |  |
| Can different sets of content be managed for each language?  |  |  |  |
| Is a translation a version of a single page or a linked clone of a master page that supports variation?  |  |  |  |
| What character sets and encoding are supported? |  |  |  |
| Please describe the process of sending content for translation and applying translations to content in the CMS.  |  |  |  |
|  |  |  |  |
| **Security and Compliance** |  |  |  |
| Are you compliant with GDPR? CCPA? |  |  |  |
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| --- |
| Describe your approach to Data Privacy and PII |

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| **Roles and Users** |  |  |  |
| List the directory systems the CMS integrates with.  |  |  |  |
| If integrating with an existing directory system, can additional users and roles be added to the CMS? |  |  |  |
| Describe the roles assigned out of the box. Can a user be assigned multiple roles? How are permissions applied for multiple roles? |  |  |  |
|  |  |  |  |
| **Integration** |  |  |  |
| List the marketing automation systems the CMS integrates with. Describe how pages are tracked. |  |  |  |
| List the Analytics platforms the CMS integrates with.  |  |  |  |
| Does the CMS provide built-in analytics? Describe? |  |  |  |
| List the e-commerce platforms the CMS integrates with.  |  |  |  |
| List any other third-party applications the CMS integrates with. |  |  |  |
| Does the CMS provide a Web Services API to integrate with external applications and services? If so, describe what is available in the API and what kind of API it is (REST, SOAP). |  |  |  |
| Is there an automated task or scheduling system for integrating external data and content? Can syncs be scheduled? |  |  |  |
| Does the CMS provide connectors for polling content from external applications and databases? |  |  |  |
|  |  |  |  |
| **Headless** **Content Management** |  |  |  |
| Does the CMS support a structured content model for headless content delivery? |  |  |  |
| Does the CMS provide a Web Services API to publish content to external sites and applications? |  |  |  |
| Does the CMS support multi-format output to render content in third-party server technologies and languages (PHP, Java, Grails)? |  |  |  |
| Can the website deploy content into external targets and locations, such as web servers, file systems, databases, and other targets? |  |  |  |
| Does the CMS provide remote or external content preview for non-CMS managed websites and applications?  |  |  |  |
|  |  |  |  |
| **Search** |  |  |  |
| Does the CMS include a search application? Is there additional licensing or cost for search?  |  |  |  |
| Does the CMS provide a search for content and pages inside CMS? |  |  |  |
| Does the CMS provide a public website search? |  |  |  |
| Does the search application support federation or searching content that lives on web pages, assets, databases, and applications outside of CMS-managed content? |  |  |  |
| Can the search application index content inside of documents and show highlights and matches?  |  |  |  |
| Does search support facets and categories for guided search experiences? Does the search application work with the existing CMS taxonomy or set of managed categories?  |  |  |  |
| Can search be used for search-based architectures that provide dynamic lists or indexes of content for related and suggested content links and pages?  |  |  |  |
| What technology is the search application built on?  |  |  |  |
| Does the CMS integrate with third-party search engines? Which ones? |  |  |  |

## Technical Architecture, Pricing, and Support Models

| **Capabilities and Requirements** | **Vendor Details** | **Our Notes** |
| --- | --- | --- |
| **Implementation** |  |  |
| Describe the release process for the CMS, including major/minor releases and bugs/maintenance fixes. |  |  |
| Describe your release notification and delivery process. |  |  |
| How do you incorporate customer feature requests into your product development process? |  |  |
| Describe the application development environment. What technologies are supported ((Java/JSP, .NET/ASPX, LAMP, etc.)?  |  |  |
| Does your CMS support open standards (LDAP, XML, XSLT, etc.)? List the ones supported and how the CMS supports each one. |  |  |
| Describe the process of creating and modifying templates in the CMS. Include skills required, code and markup languages, etc. |  |  |
| Describe how the information architecture is defined and implemented with the CMS. Note if navigation can be changed and sections moved around, including how it's done and the associated impact on templates, design, etc. |  |  |
| What types and level of skill are required to make changes to website functionality? Indicate which code must be changed and your recommended testing and deployment process for site changes. |  |  |
| If a complete re-design is planned post-implementation, describe the best process and identify all critical elements to identify. Note if existing content and website elements can be reused and how content migration is performed. |  |  |
|  |  |  |
| **System Requirements and Architecture** |  |  |
| Describe the technical architecture for the CMS. Provide a graphic describing the architecture. |  |  |
| What server operating systems are supported? What client operating systems are supported? What browsers are supported? |  |  |
| What databases are supported for the content repository? |  |  |
| What web servers are required/supported?  |  |  |
| Describe how the content management and content delivery tiers work. Do they share the same environment? Can they be installed on different servers? Can you have multiple delivery tiers? |  |  |
| Describe the CMS's scalability approach. Are there limits on the number of objects supported? Number of users? |  |  |
| Does the architecture support load-balanced servers and clustered servers? |  |  |
| Describe how CMS application and content changes are replicated between different environments (development, test, production). |  |  |
| Does the CMS offer backup and archiving capabilities? Describe how these are implemented. |  |  |
| Describe any system administrator reporting and management capabilities. |  |  |
|  |  |  |
| **SaaS and Hosting** |  |  |
| Do you offer SaaS or Hosting? If yes, is it multi-tenant or virtualized? |  |  |
| Does the hosting include the websites and CMS software? |  |  |
| Do you provide 24/7 support and monitoring? |  |  |
| Can external applications and code be installed in the hosting environment? |  |  |
| What compliance programs are offered (SSAE16 Compliance)? |  |  |
| Is a User Acceptance Testing environment provided for accepting upgrades? |  |  |
| Can upgrades be scheduled upon request, or does the vendor set the upgrade schedule? |  |  |
| Is there downtime associated with upgrades and maintenance? |  |  |
| Does the software support Microsoft Azure Website or other auto-scaling platform-as-a-service deployments? |  |  |
|  |  |  |
| **Services and Support** |  |  |
| Describe the standard product support offering and the cost for the CMS. |  |  |
| List all training and documentation offered, including any associated costs. |  |  |
| Describe your developer support model, including any associated costs. |  |  |
| Describe your Technical Support Model and associated costs. Include the number of incidents supported, priority incidents allowed, communication methods, time zones, forums, etc. |  |  |
| Describe the typical resolution process. |  |  |
| Describe the different roles and skillsets required to support the CMS. |  |  |
| Describe the professional services offered to facilitate installation and customization and associated rates. |  |  |
| Do you have a partner ecosystem to support implementation? List some of your ISV partners and design partners. |  |  |
| Outline a typical implementation plan, including features implemented, that you have done with other clients similar to our different use cases. Include budget estimates where possible. |  |  |
|  |  |  |
| **Pricing** |  |  |
| Describe the CMS license model/structure. |  |  |
| Are there additional components included with the CMS that require additional licensing/costs?  |  |  |
| What are the maintenance and support fees associated with the CMS? |  |  |
| Describe the typical project cost for implementation of the CMS.  |  |  |
| What is the typical renewal cycle for the CMS? |  |  |

# Additional Information

We have strived to capture all the essential information necessary in the sections above to perform our evaluation, but if you want to identify additional key capabilities, features, or architecture relevant to our needs, please outline them in this section.