**Web Content Management RFP Template**

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

Web Content Management Software (Web 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 Web CMS. This is complicated by the sheer number of Web CMS solutions on the market, the industry marketing hype, and the wide range of use cases Web CMS software supports.

This document is designed to help you document your business needs and primary use cases for a new Web CMS, in addition to providing a RFP response outline you can distribute to potential vendors.

The document is separated into two parts.

* Use **Part I** to document the high level business and operational requirements for your company that help guide your short-list selection of potential Web CMS providers. Included are several tables you can use during the RFP process (Short-list 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 answered about the proposed Web CMS’s capabilities and architecture, as well 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 straight 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 Web CMS purchase decision-making process:

* Web CMS Buyer’s Guide
* Intranet Buyer's 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) Web CMS?

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

The first thing you need to understand is that there is no best Web CMS on the market. There are dozens of different web content management platforms each with its strengths, and each an optimal solution for some company. It’s critical that you select the Web CMS that is right for your company.

This means you need to be clear about your business and operational needs before you start your Web CMS selection process. Here are several things you need to clearly understand and document before you go any further:

### Business & Operational Goals & Objectives

Outline the high level business goals and objectives that your organization wants to achieve and what role your Web 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 Web CMS can help achieve.

Most groups within a company develop roadmaps (or strategic plans) that outline the activities they will do 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 not only outline the functional and technical capabilities required in the Web CMS, but also 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 Web CMS is actually supporting them.

In addition to business goals and objectives, you also need to clearly outline any operational goals you want to achieve with this new Web CMS. Discuss with your groups the types of goals they want to achieve that are hindered by the existing environment. Some of these might include:

* 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 met, would result in not selecting a particular Web CMS. For example, if you need to ensure your website experience works 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

To help with the selection process, other than simply checking the boxes for functionality listed in the RFP Web CMS capabilities spreadsheet, it’s helpful to identify several key use cases for your Web CMS based on your goals and objectives.

Some common use cases including lead generation for marketing, brand awareness for marketing and corporate communications, an intranet for Human Resources, communities for customer advocacy and influence or support, and so on.

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

## Timetable and Budget Constraints

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

Share these expectations with the Web CMS vendors to help weed out ones that aren’t able to meet these specific requirements.

Supporting Resources: In the section above, we covered at a high level business and operational goals and objectives; to understand even more about the Web CMS buyer’s selection process, read: Web CMS Buyer’s Guide.

## Supporting Tables for the RFP Process

To help select, shortlist and document the short-list interview process for Web CMS vendors, we’ve included 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 |  |  |
| Web CMS Selection Decision |  |  |

## Potential Web CMS Vendor Listing

|  |  |  |
| --- | --- | --- |
| Vendor | RFP Requested | Response Submitted |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
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## Web 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 |  |  |  |  |
| Meta Data 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 Web 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, in your responses to specific questions demonstrate how one or more of these goals and objectives can be reached.

### Business Goals & Objectives

<Outline Business Goals & Objectives>

### Operational Goals & Objectives

<Outline Operational Goals & Objectives>

### Critical Requirements

The following critical requirements must be met by the Web CMS solution. If it cannot meet these requirements, please do not respond to this RFP.

In the table, please outline at a high level how your Web 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 |  |
| WCM Selection Decision |  |

## WCM 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. Short history of the company
2. Description of the company’s products and services
3. Years In Business

### Understanding your Corporate Strategy

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

### Key Differentiators

Name 2-3 key differentiators that set your company and product apart from other Web CMS products.

### Product Roadmap

What is the origin of the core technology offering covered by this RFP? If the technology was acquired from a third party, provide a complete history of previous technology owners and code changes or integration that has taken place since acquiring the technology.

Please describe the current version of your Web 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 greatly affect the current architecture and functionality of your product.

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

### Vendor Experience and References

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

1. Please provide at least three customer references.
2. Provide at least three site reference (provide URLs) showcasing the use of your product.

## Use Cases

Below are key use cases for a Web CMS product in our company. Please provide an overview of how your Web CMS product 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 below outline a range of capabilities and requirements related to Web CMS functionality and architecture. Please indicate if the identified capabilities are out of the box or require custom implementation services and/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 Web CMS. If identified functionality will be available in a later version, please note, 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 WCM, including rich text support (HTML & CSS style enforcing). |  |  |  |
| Does the WCM provide “in-context editing” using a WYSIWYG environment?  |  |  |  |
| Does the WCM support the creation of structured content?  |  |  |  |
| Is editing from Microsoft Word, Excel and other Office productivity apps supported? How does the WCM deal with Microsoft-specific formatting? |  |  |  |
| Does the WCM support previewing content for multiple display formats? Eg. Desktop browser, mobile device, kiosk, etc? |  |  |  |
| Does the WCM support the creation and sharing of asset such as images, videos, audio, documents, etc..? |  |  |  |
| Describe how authors search for reusable content. Does the WCM support viewing a list of reusable content in the content repository? |  |  |  |
| Does the WCM offer a built-in spell checker? Can custom or third-party dictionaries be added to the spell checker? |  |  |  |
| Does the WCM support importing of content from other HTML editors, and does it recognize HTML formatting tags within text content types? |  |  |  |
| Describe the common 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 WCM provide tools for creating and managing forms? Please describe. |  |  |  |
| Does the WCM automatically format images and other rich media based on pre-defined standards for resolution, size and number of copies? |  |  |  |
| Does the WCM 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 WCM support the ability to insert content from third-party applications? Which ones? |  |  |  |
| Describe any other pre-built modules or functional components the WCM ships with. |  |  |  |
|  |  |  |  |
| **Meta Data Management** |  |  |  |
| Can contributors edit metadata for a piece of content, including any structured information? |  |  |  |
| Does the WCM 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 WCM apply metadata to images and other multimedia objects when they are uploaded? |  |  |  |
| Describe how images and other multimedia objects are stored and managed in your system? Can users associate metadata with images and multimedia objects?  |  |  |  |
| Describe how the WCM supports content indexing and cross-referencing through metadata, content keyword attributes or explicit content identifiers. |  |  |  |
|  |  |  |  |
| **Social Media & Blogs** |  |  |  |
| Does the WCM provide separate 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 WCM displays external social site content. |  |  |  |
| Does the WCM have social sharing widgets? List & describe them. |  |  |  |
|  |  |  |  |
| **Search Engine Optimization**  |  |  |  |
| Does the WCM provide a section for all contributors to enter SEO elements such as Page Title, Summary, keyword, etc..? Does the WCM identify missing critical SEO elements before a page/post is published? |  |  |  |
| Prior to publishing content, does the WCM analyze the content for SEO and notify the author of potential SEO issues? |  |  |  |
| Does the WCM offer keyword optimization features? Describe. |  |  |  |
| Prior to publishing is content tested for broken links? |  |  |  |
| Describe how the WCM deals with URLs when content is moved or deleted?  |  |  |  |
|  |  |  |  |
| **Workflow and Governance** |  |  |  |
| Describe how workflows are created and edited within the WCM. 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 through the product API? |  |  |  |
| Describe the notification process for workflows. Are notifications customizable? How do users track tasks and assignments with the WCM? |  |  |  |
| At what levels within the WCM 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 WCM support scheduled publishing/un-publishing? |  |  |  |
| Does the WCM maintain a full 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 WCM provide “red-lining” to view content changes, and approve or reject previous drafts? |  |  |  |
| Does the WCM provide a workflow for out-of-date and expired content? Does it provide automated email notifications for content nearing its expiration date?  |  |  |  |
| Does the WCM 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 WCM support automatically generated menus and navigation based on directory content? Can these menus/navigations be modified? |  |  |  |
| Does the WCM support a WYSIWYG environment for maintaining site navigation? |  |  |  |
| Describe the levels/types of menus that can be created with the WCM/ |  |  |  |
| Does the WCM support automatic creation of lists of pages based on tags, categories, etc..? Are these lists automatically updated as content is created and removed? |  |  |  |
|  |  |  |  |
| **Design and Templates** |  |  |  |
| Does the WCM provide a visual page builder /template layout environment? Describe how it works. E.g. drag and drop, widgets, etc. |  |  |  |
| Describe the type of mark-up generated by the page builder. |  |  |  |
| Does the page builder support a responsive framework? Which ones? |  |  |  |
| Does the WCM provide responsive templates? |  |  |  |
| Does the WCM provide templates for mobile, tablets and other channels? |  |  |  |
| Describe how design changes are applied to existing pages. |  |  |  |
| Does the WCM offer preview of content to different channels/devices? |  |  |  |
| Does the WCM 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? |  |  |  |
|  |  |  |  |
| **Multi-Lingual Content Management**  |  |  |  |
| Does the WCM support managing and publishing content in different languages? |  |  |  |
| Does the WCM 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 WCM 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 linked clone of a master page that support variation?  |  |  |  |
| What character sets and encoding are supported? |  |  |  |
| Please describe the process of sending content for translation and applying translations to content in the WCM?  |  |  |  |
|  |  |  |  |
| **Roles and Users** |  |  |  |
| List the directory systems the WCM integrates with.  |  |  |  |
| If integrating with an existing directory system, can additional users and roles be added to the WCM? |  |  |  |
| 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 WCM integrates with? Describe how pages are tracked? |  |  |  |
| List the Analytics platforms the WCM integrates with.  |  |  |  |
| Does the WCM provide built-in analytics? Describe? |  |  |  |
| List the e-commerce platforms the WCM integrates with.  |  |  |  |
| List any other third-party applications the WCM integrates with. |  |  |  |
| Does the WCM 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 WCM 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 WCM provide connectors for polling content from external applications and databases? |  |  |  |
|  |  |  |  |
| **Search** |  |  |  |
| Does the WCM include a search application? Is there additional licensing or cost for search?  |  |  |  |
| Does the WCM provide search for content and pages inside WCM? |  |  |  |
| Does the WCM provide public website search? |  |  |  |
| Does the search application support federation, or searching content that lives on web pages, assets, databases, and applications outside of WCM 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 WCM 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?  |  |  |  |

## Technical Architecture, Pricing and Support Models

| **Capabilities and Requirements** | **Vendor Details** | **Our Notes** |
| --- | --- | --- |
| **Implementation** |  |  |
| Describe the release process for the WCM, including major/minor releases, bugs/maintenance fixes. |  |  |
| Describe your release notification and delivery process. |  |  |
| How do you incorporate customer feature requests into your product development process? |  |  |
| Describe the Web application development environment. What technologies are supported ((Java/JSP, .NET/ASPX, LAMP, etc.).  |  |  |
| Does your WCM support open standards (LDAP, XML, XSLT, etc.)? List the ones supported and how the WCM supports each one. |  |  |
| Describe the process to create and modify templates in the WCM. Include skills required, code and mark-up languages, etc. |  |  |
| Describe how the information architecture is defined and implemented with the WCM. 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 what your recommended testing and deployment process is 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 any existing content and website elements can be reused and/or how content migration is performed. |  |  |
|  |  |  |
| **System Requirements and Architecture** |  |  |
| Describe the technical architecture for the WCM. 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 WCM’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 WCM application and content changes are replicated between different environments (development, test, production). |  |  |
| Does the WCM offer back-up 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 WCM. |  |  |
| 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 number of incidents supported, priority incidents allowed, communication methods, time zones, forums, etc. |  |  |
| Describe the typical resolution process. |  |  |
| Describe the different roles and skills sets required to support the WCM. |  |  |
| 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 WCM license model/structure. |  |  |
| Are there additional components included with the WCM that require additional licensing/costs?  |  |  |
| What are the maintenance and support fees associated with the WCM? |  |  |
| Describe the typical project cost for implementation of the WCM?  |  |  |
| What is the typical renewal cycle for the WCM? |  |  |

# Additional Information

We have strived to capture all the important 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.