



**Signs it's time to
upgrade your CMS—
and how your growing
business can do it right.**

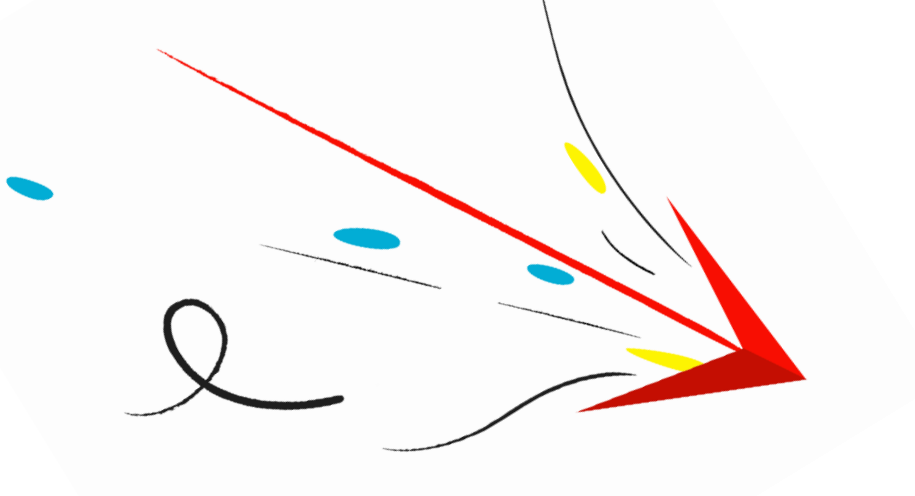


Introduction

Rubrik, a cloud data management company based in Palo Alto, California, built their first website on a shoestring budget using WordPress. That worked fine during the startup phase, but as the company grew, the platform wasn't able to scale with their business. The site had stability and performance issues. The company's marketers depended heavily on IT to publish updates, and they couldn't easily reuse content.

Tim Chen, director of web marketing at Rubrik, lobbied to replace WordPress with a modern content management system (CMS). He felt strongly that marketers should be able to self-publish content. "Making developers update tons of pages is just a huge waste of their time," he said. Chen won the IT stakeholders over by explaining how the new platform would improve site stability, security, and compliance. With the marketing stakeholders, he emphasized the opportunities to accelerate pipeline growth and get content to market faster.

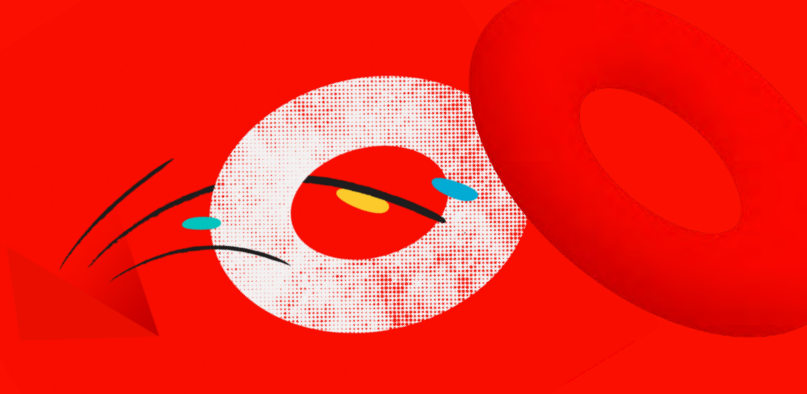




"I was just really, really persistent," Chen said. "You can't be shy about putting a strong case out there because it's a big expenditure, and ultimately it's going to reflect on you."

Many companies upgrade their CMS as part of a larger digital transformation initiative. Adopting a new CMS doesn't mean you have to completely redesign your website, but it can be an opportunity to reimagine the digital experience you're providing to your customers.

Once you've implemented a new CMS, you'll likely live with that platform for several years, so it's important to get the timing, solution, and process right. The five challenges listed below are signs that it might be time to upgrade your CMS. If you decide that it is, this guide will help you figure out how to choose the solution that best meets your goals—and then deploy it in a way that quickly adds value to your business.



Five signs it's time to replatform your website

1. Your website is having performance issues.

If your site goes down because of a spike in traffic, your customers aren't getting a great experience. Downtime means that you lose out on revenue opportunities. Plus, it forces your IT team to scramble to get the site back up. But less dramatic issues, like slow load times, can also have a big impact on your business. Both marketing and IT care a lot about site performance. As the Rubrik example shows, if you're building a business case to replatform, focusing on performance is a good way to get support from IT.

2. Your marketing teams can't put out content fast enough.

If marketing depends on IT to publish content, it can be hard to pivot quickly in response to market trends. Your customers expect brands to be responsive to their needs and to the external environment. For example, some brands that didn't react quickly enough to the COVID-19 pandemic were putting out messages that felt tone deaf for several weeks. Even in normal times the marketplace is dynamic—and speed matters.

3. You're struggling to deliver the right content to your target audiences.

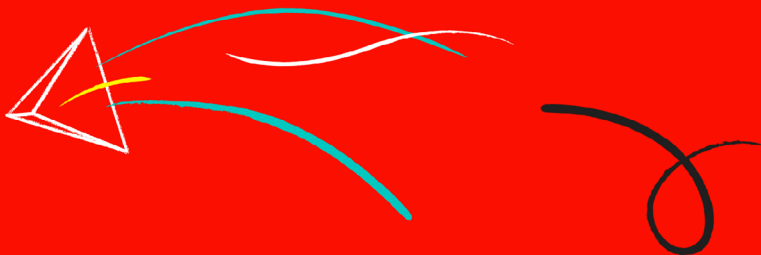
Everyone knows they should be personalizing their customer experiences, but a lot of mid-size companies don't have the tools to do it. If you can't tailor content to your key target audiences, you're leaving money on the table. Improving your conversion rates by 10, 5, or even 2 percent by delivering content that's more relevant to your ideal customers will positively affect your bottom line.

4. Your IT team is overburdened with maintenance and security tasks.

Most developers prefer to spend their time creating innovative solutions to business problems—not publishing content updates, building and testing custom features for marketing, and preparing for CMS version upgrades. If your developers are spending a lot of time on low-level tasks, you need to replatform.

5. Your CMS can't support all the channels you need to use to reach your customers.

Often, different teams are responsible for different channels. For example, marketing might be responsible for web and IT might be responsible for mobile. If content is inconsistent across these channels, your customers aren't getting the best possible experience. And if the teams aren't working together, the process for creating and publishing content will be inefficient, since content will have to be created twice. Adding other channels to the mix—like social, in-store digital signage, or IoT devices—makes the problem even more complex.



Critical considerations for your new CMS



Mid-size companies like Rubrik—and other organizations that are stretched for resources—tend to place a high value on CMS platforms that provide self-service functionality for marketing teams. They want a solution they can deploy quickly so that it can start adding value within a few months. And they want to worry as little as possible about issues like site stability, performance, and security.

If you, like Rubrik, need to replatform, the following considerations will help you identify a solution that fits your business needs:

Location, location, location

An on-premise system, hosted on your own servers, gives you an extra level of control—but it's expensive to maintain and requires a lot of work from your IT team. "If you have an army of developers, then maybe on-premise is an option," said Chen. "But even then, I wouldn't advise it because the risk falls onto you."

A cloud-hosted system is less expensive as well as easier to maintain since more responsibility for maintenance and security shifts to the vendor. However, your IT team still has to do a lot of testing to prepare for version upgrades.

A cloud-native system, based on a microservices architecture, is always on and always at scale since it auto-scales when there's a

spike in traffic. It's also always current and always secure—new features are continuously deployed and automatically validated so your IT team doesn't have to worry about version upgrades.

The pricing models for both cloud-hosted and cloud-native solutions are flexible. You pay based on the resources you consume, so you can start small and then scale as your business grows. Overall, a cloud-native CMS has the lowest total cost of ownership because the maintenance costs are minimal.

To learn more, read our guide [How a Cloud-Native CMS Makes Content Delivery Faster and Easier](#).

Your IT department's level of involvement

If your marketing team depends heavily on IT to publish content, it may be time to replatform—especially if IT is involved in simple web content updates. To deliver the experiences your customers expect, you have to get content to market quickly. And that means your marketing team needs to be able to design and build experiences using templates in a governed environment.

Content efficiency and delivery

If you don't have tools that let you easily repurpose and adapt content for multiple channels, you need to replatform. Traditional and hybrid platforms each let marketing publish content with minimal support from IT, but a traditional CMS doesn't let you reuse content across multiple channels. A hybrid CMS gives you the best of both worlds.

If your new platform lets you create content fragments (reusable individual pieces of content, separated from design) and experience fragments (reusable groupings of content that form standalone experiences), you can easily repurpose content across multiple pages, channels, and devices. For example, you might have a thank-you page that includes one section that's always the same and another section that changes depending on the context. Content and experience fragments work to automatically assemble context-dependent versions of your thank-you page, eliminating the need for manual customization.

Personalization capabilities

Upgrading your CMS gives you a great opportunity to add personalization to your toolkit. At a minimum, you need to have some basic analytics, testing, and targeting capabilities. Don't get bogged down in perfectionism—you can start small and build from there.



Support for out-of-the-box tools and features

Out-of-the-box features speed the implementation process and make life easier for both IT and marketing. If you choose the right vendor, you can likely build at least 80 percent of your website using built-in components. You also need to know what kinds of features the vendor will maintain and update over time. Some vendors offer out-of-the-box features but don't upgrade them on a regular basis, so that burden falls on your IT team.

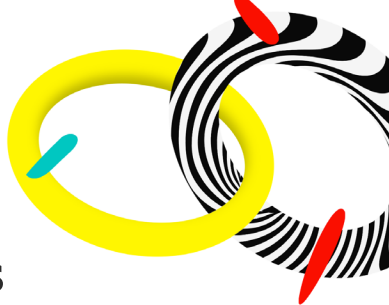
For Chen, built-in components were a key factor in choosing a CMS platform. He wanted to create templates that were truly reusable. When you develop something using components, you can roll it out and instantly make it available to every single page, old and new.

Integration with other applications

This question is a critical one for your IT stakeholders. They don't want to spend their time building custom integrations with other systems in your marketing technology stack. Pay attention to the workflows. Will adding this technology make it easier for your teams to collaborate? Do some due diligence on the front end of the vendor selection process. If you limit your short list to solutions that require minimal integration support, you'll have an easier time getting IT on board.

For more tips on choosing a CMS, read our guide [How to Select the Right Content Management System](#).

Make your platform deployment a success



Once you've chosen a solution, following the steps below will help make your deployment as smooth and efficient as possible.

Find the right technology partner

Chen noted that Rubrik's partner, Qualified Digital, not only understood the technical aspects of the CMS implementation, but also partnered with him on the strategy. To build a customer-centric website, your whole strategy has to be based on a deep understanding of your target audience. "That turns into top tasks, which turns into information architecture, which then translates into the user experience," said Chen. And that means you need a partner who understands buyers and personas.

When you're vetting agencies, be sure to ask about their migration expertise. Of course, you need a partner who knows how to deploy your new CMS. But you also need someone who understands how the old system maps to the new system. Many organizations hire a partner who has deep expertise in only the new system. As a result, the migration takes longer and costs more than it should.

Do a content audit

The first goal of the content audit is to decide—based on your web analytics data and your business goals for different parts of your

site—which pages you want to re-create from scratch instead of migrating. Let's say you have 10,000 pages. If you create a 2x2 matrix with "high value" on one axis and "high touch" on the other, perhaps 200 of those pages will fit in the "high-value, high-touch" quadrant. Don't worry about migrating those 200 pages. Create updated versions in your new CMS, using the advanced functionality to make them as compelling as possible.

The second goal of the content audit is to decide which pages to migrate and which pages to abandon. There are likely some low-value pages that you need to keep for contractual or logistical reasons, and others that you could eliminate.

Use analytics to identify key areas for improvement

A website migration is a good opportunity to assess the overall quality of your content. Consider hiring a content specialist to audit your current site, look at your web analytics data, and make recommendations for improvement. Whether you hire a specialist or do your own analysis, make sure you have a good sense of what's working and what's not working on your current site. Then when you get the new site up and running, you'll be able to set meaningful goals for improvement.

If you switch to a new analytics solution as part of your CMS migration, consider adding tags for both the old and new systems to your new site so that you can run the two systems in parallel for a few months. That way, you'll have some current data that's in the

same format as your historical data, which makes it easier to spot changes—like a dramatic increase or decrease in traffic to a certain page. Once you have a solid sense of what's happening on the new site, you can unplug the old analytics system.

Design and build in parallel, keeping out-of-the-box functionality in mind

A lot of big companies have a custom development mindset about their websites. Their default process is to design a new feature, create a wireframe, and add that feature to a development queue. The development team works its way through the list, creating custom components for all of the new features. But that's an outdated approach—and one that doesn't make sense for midsize companies or organizations with limited resources.

The best CMS platforms now offer built-in core components that meet the functional requirements for most new features you're



likely to need. For example, elements like teasers and carousels should have a tailored look and feel that reflects your brand, but they shouldn't need custom development work.

"You can do it out of the box, and so you should do it out of the box," said Yuji Nakagawa, voice of the customer advocate with Adobe Consulting Services. The right methodology is to design a new feature, map it against the core components, and then add it to the development queue only if it truly requires a custom component. Your "high-value, high-touch" matrix can help you decide when it makes sense to create a component from scratch. You should only think about building custom components for pages that are driving—or are likely to drive—significant business value.

When you design and build in parallel, you can make adjustments as you go along. That's what Chen and his team did, gradually whittling their list of features down to the "must-haves" and moving the "nice-to-haves" to the post-launch roadmap. Chen also shifted responsibilities around as he observed the strengths and weaknesses of his design and development staff. "I looked at my design team, for example, and noticed that certain agency resources were doing well in one area and not delivering in another," he said. In a series of transparent conversations, he reshuffled assignments to set everyone up for success.

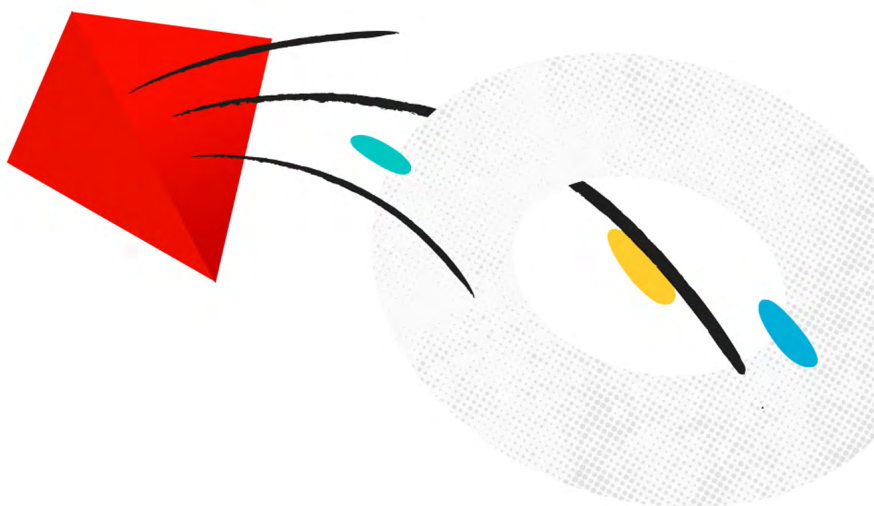
Start testing your content experience from day one

Optimization is critical, but it can be a challenge for midsize businesses that aren't very experienced in it. Maybe you've been

talking for years about building a testing program, but you're just not there yet. Think of your new CMS as an opportunity to begin your optimization and testing journey.

Some marketing teams fall into the trap of taking a sequential approach. They'll roll out the new CMS, layer on some analytics, and leave testing and targeting until the end. There's a better approach—adopt a testing and targeting mindset from the very beginning. Start with a baby step, like setting up a simple A/B test to gather data on one of your key audiences. Then build what you learn into your next testing activity. If your team is brand new to testing and targeting, just doing it should be your first success metric. Over time, you'll get better at it, and you'll set specific goals for improving your conversion rates in specific areas.

For more deployment tips, read our guide [Up and Running: How to Deploy a Modern CMS Quickly](#).



Define your vision, sell it, and then make it real

As you make a plan to upgrade your CMS, review this guide to help spark even more considerations for choosing the best CMS for you. Ultimately, you'll decide which factors are most important based on your specific business goals and your vision for the future.

At Rubrik, Chen's overarching vision was omnichannel marketing. Along the way to reaching that goal, he wanted to build a customer-centric website, empower marketers to quickly self-publish content, and create a system for easily reusing content. Omnichannel marketing wasn't a goal they could achieve right away just by launching a new CMS. But it was a vision they could grow into with the right platform.

"As a marketer or a digital leader, you have to have a really strong point of view so that you can sell your vision," Chen said. "My vision was around driving maximum growth in just a few years. Someone else's vision could be something else entirely."

Whatever the size of your business, make sure you have a clear vision of the future you're trying to create. Decide what types of experiences you want to be delivering to your customers in two or three years.

As you evaluate solutions and build internal support for your vision, pay attention to both the current problems you're trying to solve and the future opportunities you'd like to pursue over time. You can't anticipate all the changes that will happen in the marketplace or in your business over the lifespan of your new CMS—but you can future-proof your investment by choosing a solution that gives you room to grow.



Adobe can help

Adobe Experience Manager Sites helps you deliver content faster using an AI-powered content management system that's built on a scalable, agile, and secure cloud-native foundation. Experience Manager Sites gives you the robust features and flexible tools you need to create and deploy personalized experiences for your whole audience—on any screen.

As a scalable, flexible, cloud-native CMS, companies of all sizes use Experience Manager Sites to deliver world-class customer experiences.

Find out more about how about how Experience Manager can help midsize businesses.

[Learn more](#)

Sources

Tim Chen, director of web marketing, Rubrik, personal interview, March 30, 2020.

"How a Cloud-Native CMS Makes Content Delivery Faster and Easier," Adobe blog, January 13, 2020.

"Best Practices in Content Management: IT Edition," Adobe blog, February 14, 2020.

Yuji Nakagawa, voice of the customer advocate, Adobe, personal interview, March 30, 2020.

Hyman Chung, senior product manager, Adobe, personal interview, March 27, 2020.

Karthik Muralidharan, senior product marketing manager, Adobe Experience Manager Sites, personal interview, March 26, 2020.



Copyright © 2020 Adobe. All rights reserved.
Adobe and the Adobe logo are either
registered trademarks or trademarks of Adobe
in the United States and/or other countries.