

# Higher Education Web Content Management RFP Template

A Sample Request for Proposal for Distribution to Prospective University Web Content Management Vendors

## How to Use This Template

Finding and selecting a web content management software product to manage a college website often requires an RFP process. This document can serve as a foundation for the RFP you will use with your upcoming WCM system purchase.

The document is separated into two sections:

- **Section I** is for internal use, and can assist in creating a list of potential WCM vendors. It will help you articulate your institution's business and operational goals so you can better focus your search.
- **Section II** includes a draft RFP questionnaire that you can use in your RFP. Feel free to modify and build on this questionnaire to better qualify submissions.

We encourage you to make the RFP process as interactive as possible. In our experience, the RFP process can help create a sense of partnership between a college web team and its chosen CMS vendor. The more open you are about your business goals and success metrics, the more accurate and useful the vendor responses.

Please reach out to us directly with further questions as you go through your RFP, we would be happy to assist you.

Good Luck!

The Percussion Team

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# Section I: Preparing for the RFP

*Note: This section can be used for preparing your organization for getting the most out of the RFP process. It should not be included in the final RFP packet that will be distributed to your prospective WCM vendors.*

## Why an RFP?

The process of selecting a Web Content Management system for a college or university website can seem daunting. There are many, many vendors in the market, and differentiating among them to understand which is the best fit is a difficult task. We designed this document to make the process easier.

This RFP will help you collect initial input from vendors, and deepen your understanding of how a WCM vendor can respond to your website's specific needs. The key to all of this is to understand what you want from a WCM before you start the process.

Do not focus solely on Year 1 – find out how your vendors can serve short-term goals and help you plan for growth over the long term. Be sure to understand how your web content management software will need to adapt with your content marketing strategy as the web evolves.

Throughout this document you will notice **highlighted sections** labeled “This may be helpful.” These sections explain why we have added certain RFP questions, or give you some additional context for evaluating vendor responses. Remember to remove the highlighted sections before sending this document to your selected respondents.

## A. Define Institutional Goals

The first step is to identify your institutional business goals and objectives and how they can be supported by your website. These will help provide a rubric to evaluate RFP responses. You can map your goals and objectives to the business value, capabilities, features, and technologies used by your “long list” of WCM vendors to help you identify the “short list.”

This is one of the most time consuming steps in your RFP process, but it is also the most valuable. Work across all departments that will use or be impacted by the WCM selection and have a stake in the success of your website. In addition to IT and Marketing, this is likely to include admissions, financial aid, academics, student services, athletics, and university administrators.

### Business Goals

This section of the RFP is intended to help define your business goals, and from there, create a clearer understanding of the value you expect from your web content management system. Defining these goals early on helps keep purchase and project decisions focused on specific outcomes. Once you've defined these goals, make sure to prioritize them according to value and importance.

Examples of business goals for a college website might include:

- Increase the percentage of online gifts to the Annual Fund to 25% of the total
- Increase online application submissions by 5% within 9 months
- Launch foreign language sites to better target international students
- Increase inquiries for education majors by 20%
- Decrease the total number of clicks required for adult students to find non-traditional program information by 2

A website business goal should always translate into actions that support revenue growth. A good model for these is to keep goals SMART: Specific, Measurable, Actionable, Realistic, and Time-constrained.

Once you have identified your Business Goals, you can now place them within the context of a WCM purchase. As an example, if your business goals include increasing open house registrations, how do the WCMs you are considering help your organization drive more traffic to the open house pages and encourage visitors to take action? What role will the technologies under consideration play in helping your college's site meet measurable outcomes?

### Operational Goals

Although business goals are critical to choosing the best WCM vendor, most colleges and universities begin their search for a new vendor for operational reasons. Often the change is led by an upcoming redesign, the inability of the current system to support new content marketing initiatives, technological or financial limitations to growing the incumbent WCM, lack of adoption by trained users, or simply outgrowing the old CMS. In addition to your business goals, create a list of those capabilities that are important to your core website team, and the rest of the users on campus. Some examples might include:

#### *Reduce IT Bottlenecks*

Remove reliance on IT to manage WCM and provide Marketing users the right to own and maintain the new WCM. IT staff and resources can focus on more technical priorities, and lowered barriers to entry can enable marketers to grow their contributor pool.

#### *Enable Content Marketing*

A WCM that improves ease of use will increase the number of contributors, which in turn will accelerate content marketing efforts. Have the ability to launch a blog and manage multi-channel, social publishing strategies will help distribution, inbound traffic, and SEO.

#### *Improve Process Efficiency*

Implement appropriate roles and permissions to create a workflow that improves current process deficiencies, enables brand and editorial consistency, and encourages content creators to stay involved.

## Critical Requirements

Typically in any project there are 3 to 5 “must-haves.” These particular features are of critical importance to meet the needs of the business and the operational goals of your college’s website. These are not “in 3 years we would like to” requirements. These should only be the things that without which, the site or the site strategy will fail. This could mean integration with your online application platform or staff directory, the ability to deliver a mobile-optimized website, or ongoing support post-launch.

It is helpful to document those non-negotiable items in the RFP so that vendors are able to tailor their responses and ensure they address those requirements directly. Encourage vendors to describe the process for how they would handle these requirements, and include case studies of where they have done this with other clients.

### ***This May Be Helpful....***

*After developing your Business and Operational Goals, review the web sites of each viable vendor. Compare their messaging and value propositions to your goals. If there appears to be a fit between your goals and the value proposition of a vendor, add that vendor to your RFP distribution list.*

*Once you receive the RFP responses, compare each response to each vendor’s site. Do the answers they provided in their RFP response map to their value proposition and case studies featured on their site? If not, you may want to ask them about the inconsistency.*

*Consider also included 2-3 typical use cases that your end users or technical team will execute in a given day or week, and then ask the vendors to describe how they would manage those cases.*

## B. Define Your Budget and Timing

With your business and operational goals defined, you can start building a business case for a WCM purchase, and secure the necessary budget early on. Having a budget for your project will ensure potential WCM vendors are more responsive – a potential client with an approved budget is more likely to get immediate attention than a potential client who is still in the planning stages. The process of gaining budget approval may also reveal executive level concerns with the project, allowing you to adapt your project plan to address those concerns.

### **This May Be Helpful...**

*Percussion has developed a number of tools to help build your winning business case and evaluate WCM vendors. They are available for download on [percussion.com](http://www.percussion.com) here:*

- <http://www.percussion.com/products/freedom/business-case-for-web-content-management-roi>
- <http://www.percussion.com/cms-buyers-guide>

Include a timetable with your RFP. It doesn't have to be overly detailed, but it will serve to communicate short and long term milestones for prospective vendors and help manage expectations.

<b>Milestone</b>	<b>Date(s)</b>
Distribute RFP	
RFPs must be returned	
Select Short List of Vendors	
Meet with Short List of Vendors	
Conduct Eval of Short List Vendors	
Select and Purchase WCM	

## Section II: The RFP Template

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*Note: This is the RFP template itself. Section's A and B are for you to communicate your objectives, timetables, and critical functionality to prospective vendors for their response.*

### A. Our Business and Operational Goals

Before completing this RFP, please take a moment to review our business and operational goals. This will provide context for your responses. As you answer the questions within this document, illustrate how your organization's capabilities allow us to reach our goals.

#### **Business Goals**

*<Insert your Business Goals here>*

#### **Operational Goals**

*<Insert your Operational Goals here>*

#### **Timing of Deliverables**

*<Insert your key dates and milestones here>*

#### **Critical Requirements**

*<Insert your critical requirements here>*

## **B. RFP questionnaire**

### **Business Value and Roadmap**

It is important for our company to understand your corporate strategy, and how that manifests itself in your product direction.

Provide a few sentences that describe how you solve business issues for clients. What is your overall value proposition? How do you differentiate your product offering from other vendors that we are investigating?

Please provide your technology roadmap. What direction will your product(s) take over the next one- two years? What factors in the WCM market are driving that direction?

Please speak to your experience with higher education websites and how you can speak to the unique business and operational needs of a college website project.

### **Clients**

Please list higher education clients you have worked with. Where appropriate, include at least one case study featuring a higher education client.

### **Use Cases**

<Insert key user use-cases for response here>

## C. Capabilities

In each of the areas below identify if the feature is available “out of the box” (upon installation and configuration), or requires custom implementation services to enable (the vendor will build it for your website). Feel free to include notes in the third column and screenshots in an appendix to illustrate/expand on your response.

Capabilities and Requirements	Vendor Response 1-Out of the Box 2-Custom Implementation	Additional Vendor Details
<b>Content Creation and Editing</b>		
Does the WCM support content editing, including support for rich text with HTML and style (CSS) enforcement?		
Does the WCM support “in-context editing” with a WYSIWYG environment showing the edits in the context of how those edits will appear in the resulting Web page(s)?		
Does the WCM support structured content editing, which guides the content contributor through the process of creating content to ensure consistency?		
Does the WCM allow editing from Microsoft Word? Does it support any “clean up” of characters and other formatting issues that often occur with content originating in Microsoft Word?		
Does the WCM provide the ability to create and maintain shared assets that are used throughout one or multiple websites?		
Can users search to find existing reusable content?		
Does the WCM provide a means to browse reusable content available in the content repository?		



Does the WCM provide common “library services” including check in and out, revisions and versions?		
<p>Which of the following content types are supported out-of-the-box?</p> <ul style="list-style-type: none"> <li>Rich Text</li> <li>Plain text</li> <li>HTML</li> <li>Image</li> <li>File (PDF/Word/etc)</li> <li>Calendar Events</li> <li>Flash</li> <li>Video</li> <li>Structured Content</li> </ul>		
<b>Meta Data Management</b>		
Does the WCM support editing of metadata by content contributors, including structured information such as publication and expiration dates, titles, and call-outs?		
Does the WCM provide both open ended "tag lists" of pages, as well as a controlled hierarchy of "categories" for site visitors to select from?		
Can these tags and categories lists be used across all site content, from blog posts, to landing pages and other pages to best promote click through from one page to the next?		
Does the WCM allow for meta-data tagging using the schema.org taxonomy?		

<b>Blogging</b>		
Does the WCM provide a built-in, integrated blog?		
Does the WCM allow multiple blogs within one website?		
Does the WCM allow RSS feed generation for blogs?		
Does the WCM allow for comments and comment moderation on any page?		
Does the WCM allow blog content to be intermixed with other site content, pages and related link lists?		
<b>Social Media</b>		
Can the WCM display external social site content?		
Does the WCM allow for external RSS feeds to be displayed inline?		
Does the WCM have social sharing widgets?		
Does the WCM allow for comments to be used on any site page?		
Does the WCM provide the ability to generate polls?		
<b>SEO</b>		
Does the WCM ensure that Page Title, Page Summary and other critical SEO elements can be created even by casual content contributors?		
Does the WCM identify pages that are missing		

critical SEO elements?		
Does the WCM provide marketers the ability to create and track URLs that are keyword, search and user friendly?		
Does the WCM provide marketers the ability to retain URLs when changes are made to avoid broken links from search engines?		
<b>Analytics</b>		
Does the WCM provide out of the box integration to Analytics platforms? Which?		
Does the WCM allow marketers to determine how content publishing activity impacts site traffic?		
Does the WCM allow marketers to determine where on the site to publish new content?		
Does the WCM allow marketers to determine how frequently to update or create new content based on site traffic goals?		
<b>Design and Templates</b>		
Does the WCM provide a page building and layout environment where users can select or drag and drop from a palette of page elements to change page designs?		
Does the WCM provide out-of-the-box responsive templates?		
Can mobile templates and themes be used to style the same content differently on mobile vs. main site?		

Does the WCM provide the ability to create a design by modeling it on an existing site or design?		
Can designs from third party designers be imported?		
Can design changes be easily applied to existing pages?		
What coding skills are required to change existing designs?		
Can designers preview what pages will look like on various mobile devices?		
<b>Navigation</b>		
Does the system provide a WYSIWYG capability to maintain site navigation?		
Does the system provide out-of-the-box breadcrumb capabilities to include in the site?		
Does the system provide the ability to create lists of pages based on directory, tag or category that update automatically as new content is created?		
Does the system provide support for mega-menus?		
Does the system provide support for “hamburger” navigation when viewed on a mobile device?		
Does the system provide out-of-the-box core site navigation?		
<b>Roles and Users</b>		
How are users and user authentication managed?		

Can you reuse existing user logins and directory systems (LDAP, Active Directory)?		
Are there limits to the number of users that can be added as content contributors?		
Can you create custom roles and associate users to roles through an easy-to-use administrative interface?		
Can a given user be assigned to multiple roles? Are permissions cumulative?		
<b>Workflow and Governance</b>		
Does the system provide the ability to define workflows through an easy-to-use administrative interface?		
Does workflow include the ability to determine which roles have access to perform which actions at each step of the workflow?		
Does the WCM support multiple workflows to support multiple sites or sections of the site?		
Can workflow be highly granular, meaning that workflow could be as detailed as a specific page?		
How does the WCM automate notification to users and roles when there is content for review?		
Can the WCM schedule a page to go live and expire (come down from the site)?		
Does the WCM provide a full revision history of changes made and who performed them?		
Does the WCM allow older versions of content to		

be promoted to the live site?		
Does the WCM provide validation on content and metadata, such as required fields or allowable types of content by field (e.g. only email in an email address field)?		
Does the WCM provide a means to bulk upload content such as files and images?		
Does the WCM provide a preview function so users can see page content before it is approved?		
Can pages be viewed on mobile devices?		
Is the WCM decoupled from the web server?		
Can different sites be published to different web servers?		
Can content be published to a database?		
<b>Integration</b>		
Does the system provide integration to marketing automation systems such as Eloqua, Marketo, Hubspot, etc? Please describe how page tracking can be implemented.		
Does the system provide integration to analytics platforms?		
Does the system provide ability to integrate third party applications on a page?		
Does the system provide the ability to integrate with calendaring applications?		
Does the system provide the ability to integrate		

with a course catalog?		
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The questions that follow are focused on processes and do not lend themselves to an out of the box vs. custom build designation, but will help us understand what to expect during implementation and post launch.

Capabilities and Requirements	Vendor Details
<b>Implementation</b>	
Describe the template creation, definition, and edit process required to deploy your product for our web site(s) including skills, any code or markup languages required, tools used or required.	
Describe the process used to define Site Navigation or "information architecture." Who can move site sections and subsections, what skill is required to rearrange sections in a site? When site sections are moved or reorganized what impact does this have on templates, design and markup or other site code?	
Describe how site features and functions are implemented, such as comments, link lists, image galleries and other features described above.	
What skill is required to make changes to site functionality? Does this involve changing WCM code? What QA and deployment processes are recommended when changes to site functions are made?	
Describe the upgrade process for the WCM? Are there categories of upgrades (major and minor)? Do all site functions continue to work on all upgrades without re-implementation? What re-implementation if any has been required for past upgrades of your software?	
How frequently are releases? How many releases per year contain new functionality as opposed to just bug fixes?	
Implementation Services. Describe your implementation services offerings and typical implementation plan. If partners are used,	



please provide information on your partner strategy, and specifically how you view the role of partners in the successful use of your software.	
Implementation Time. Describe the time to implement that is typical for customers with a site or Web presence (site functions, channels, etc.) similar to ours.	
Implementation Budget. Describe the typical ratio or multiplier for implementation services relative to license cost for customers with a Web site or presence similar to ours.	
Redesign implementation. Describe what's required for a redesign post-implementation. Is new custom development required? What skills are needed to implement a redesign? Can existing elements and content be reused? How is content migration completed?	
<b>System Requirements and Architecture</b>	
What operating systems are required?	
Does the WCM ship with a content repository?	
What browsers and client/desktop operating systems are supported? (e.g. IE, Firefox, Windows, MAC)	
Do the Web Delivery and Content Management tiers share the same software? Does your Content Management software run on our Web Delivery Tier?	
Can other Web Delivery code and Web applications share the Web Delivery environment? Does your Content Management system become our Web server and Web application server?	
What Web servers are required and/or supported? How many web servers are required in a multi-tiered model?	
What Web application development environments are supported?	

(Java/JSP, .NET/ASPX, LAMP, etc.)	
Is the WCM available on premise or cloud hosted or both?	
<b>Services and Support</b>	
Please list all training and documentation that is offered around your system.	
Describe your Technical Support model, escalation procedures, communication, time zones, forums.	
<b>Pricing</b>	
Please describe your license methodology or structure.	
Do you offer additional components that incur additional cost? Please list all components whether they are relevant to our project or not.	
Are there maintenance and support fees associated with your system?	
What do customers typically spend on re-implementation of your software? How long is the renewal cycle?	

## D. Final Comments

Please include anything that you deem relevant and important for us to consider that we have not successfully captured in the outline above.