Choosing the right CMS:
a mid-market guide

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A content management system (CMS) allows your marketing team to organize and publish content to end users without any background in coding or development. But with so many CMS solutions on the market, finding the right fit as your business scales and shifts can be tricky.

For mid-market companies, the choice can be even more difficult. Drawing on years of experience and deep expertise in CMS platforms, our team designed this guide to help companies like yours decide when, how, and why to choose a new CMS.

Our framework can help you think through different scenarios and pitfalls, so you avoid wrong turns and roadblocks on your digital journey.

→ **What we'll cover:**

- » **Signs you might be ready for a new CMS**
- » **How mid-market companies can choose the right CMS**
- » **Core CMS decision criteria for mid-market companies**
- » **Evaluating CMS platforms**
- » **Four common CMS platforms ranked for mid-market companies**
- » **Finding the right CMS implementation partner**
- » **Putting it all together**
- » *Appendix A: Creating your CMS Scorecard*
- » *Appendix B: More martech resources*

Signs you might be ready for a new CMS

You may already be feeling the pinch of a CMS that isn't quite the right fit. Migrating to a new platform isn't always the right answer—you could be fine with an upgrade or a workaround—so how can you tell if the time is right for a new solution? Here are a few signs to look for:

» Your marketing team can't make changes to content without help from IT and development teams

» You want to expand CMS access to make other teams part of your content workflows

» Your platform no longer feels robust enough for your use cases

» Your platform doesn't seem to deliver on the demo, or includes a lot of extras you don't need (but you're still paying for)

» Your content plan has expanded to include user more robust user experiences, requiring tool, functionality, and form integrations your CMS doesn't easily support

For mid-market companies, sourcing the right CMS can be even more complicated. Finding the right fit while staying scalable, attempting to anticipate the types of content you'll need to support in the future, and navigating the complexity of packaged offerings can make it difficult to decide with confidence.

How mid-market companies can choose the right CMS

Finding your best-fit platform starts by gathering the right stakeholders —usually marketing and IT, but possibly also other business units and leadership—and defining your requirements. This stage of the process should also include a careful consideration of your customer. If you've previously mapped your customer journey, think about the ways in which your new CMS would ideally support and accelerate that process.
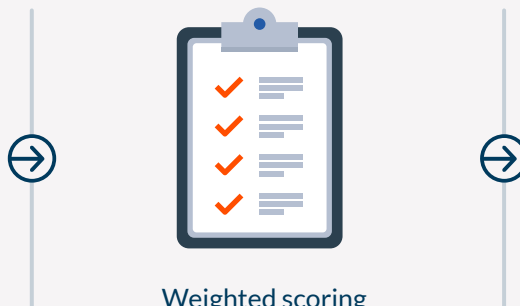
Business Needs

» Document business objectives: what will move the needle?

» Interview stakeholders who will use and maintain platform

» Clarify largest pain points and must-haves

Customer Needs

» Review how current experience is built

» Document feature set

Evaluation Criteria

Weighted scoring matrix for objectively judging best-fit platorm

Research, Recommendation, Roadmap

» Conduct independent research

» Review outcomes of scoring

» Outline next steps to achieve timely site migration

Core CMS decision criteria for mid-market companies

The results from your internal requirements and customer needs inform the evaluation criteria you'll use in considering possible platforms. While your business likely has some unique needs, most mid-market companies draw their evaluation criteria from eight key categories, choosing from sub-categories or adding their own:

Content flexibility

» Does the platform include modular templates and components?

» Does it have WYSIWYG and drag-and-drop capabilities?

» Does it support your existing design patterns (unless you're also doing a full redesign)?

Marketing capabilities

» What type of reporting does the platform allow?

» How much personalization is possible?

» Does it include marketing automation features?

» Is there an integrated email function?

» Is there any AI or ML functionality built in and/or supported?

Out-of-the-box vs customization

» How much out-of-the-box support can you expect for common website functionality like on-site search, forms, blog posts, list management, ecommerce, structured content, or databases?

» Does the platform allow gated content or portals?

» Does the platform include headless support for custom apps?

Integration capabilities

» Are there built-in third-party support features?

» How many and what type of connectors and extensions are included?

» What are the platform's API capabilities for content and code?

» Will you need an additional integration platform?

Ease of migration

» Does the product have built-in accelerators?

» Are there bulk upload capabilities?

» Does the platform share code language or content structures with your existing CMS?

» What does the base configuration look like? What level of effort should you expect to integrate it into your current architecture?

» Is this an all-in-one package solution, or will you be piecing together a solution out of plugins and third-party add-ons?

Governance and workflow

» What level of complexity does the solution support in terms of permissions?

» What does content staging and preview look like?

» Is there a dev ops environment, and what does code management look like?

» What types of workflows are supported?

Cost

» Does the vendor offer straight pricing, or will you need to negotiate a right-fit solution?

» What licensing fees should you budget for?

» How many add-ons and plug-ins will you require, and what will they cost to purchase, license, and maintain?

» What level of hosting is included or required?

» Since CMS vendors don't handle implementations, can you find a partner to help you customize, migrate, and implement the solution, and what will that cost?

Support

» What types of support options does the vendor offer? Are there multiple tiers?

» How robust is the vendor's partner network?

» Is there a community of users you can call on for off-the-books troubleshooting?

Your business will weight and prioritize different factors within those categories, but they should provide a solid starting point for your analysis.

APPENDIX A: CMS SCORECARD →

Evaluating CMS platforms

When it comes to martech evaluation, many businesses struggle to apply the criteria they generate. Much of the available research is written or funded by particular platforms. Demos only tell part of the story. And getting the features you want without bloating the budget can be tricky when you're in between the startup and enterprise tiers.

To help you navigate, we'll walk you through four common platforms as an example. We often see these on the short lists of mid-market clients looking for budget-friendly but capability-rich CMS upgrades. Our example includes:

» WordPress

» Drupal

» HubSpot CMS Hub

» Sitecore Experience Platform

Note: This list is not meant to be comprehensive! As the CMS market continues to grow and evolve, the universe of options frequently expands. Other popular mid-market solutions you may want to evaluate using the same criteria include:

» *Sitefinity*

» *Contentful*

» *Contentstack*

» *Kentico*

» *Bloomreach*

» *Crownpeak*

We'll rate each of the four examples using a simple scale:

Excellent
A strong suit of this platform

Good
On par with industry standard

OK
Some notable drawbacks, but they can be managed

Poor
A weakness of this platform

When you conduct your own evaluation, you may need to define a more granular scale, perhaps with a 1-10 range, but many companies find that a simple scale gives enough clarity to cut through the noise and lead to strong decisions.

Four common CMS options —ranked for application in mid-market companies

WordPress

Combining WordPress with some of its more popular third-party plugins, like WooCommerce, can make it a powerful product management tool. As an open-source platform, WordPress is an affordable option, although there's no such thing as a free lunch when it comes to websites. WordPress boasts an extensive set of plugins and a robust third-party development ecosystem capable of delivering against mid-market requirements with some configuration.

Criteria	Rating	Analysis
Content Flexibility	☺ Good	While the standard Gutenberg editor isn't anything revolutionary, the platform offers a range of drag-and-drop editors (some for an additional cost) that can manage a variety of content types. WordPress has a plugin for nearly every type of content you might need, but be sure to manage them thoughtfully, as any functionality you add to a WordPress site can negatively affect its speed and performance.
Marketing Capabilities	😐 OK	WordPress was first developed for blog content, and it shows. While it's far from a Digital Experience Platform out of the box, you can use a number of integration paths and plugins to get you closer to where you need to be.
OOB vs Customization	😐 OK	Don't expect a WordPress website to work solely on what WordPress provides out-of-the-box (OOB). You'll need to use third-party plugins and custom code to meet the requirements of a mid-market site. At a minimum, you'll need plugins to manage SEO and performance elements, and you'll most likely also need plugins for custom fields within your content.

WordPress (cont.)

Criteria	Rating	Analysis
Integration Capabilities	🙂 Good	WordPress offers several established paths to integration, including both APIs and connectors. Because it's so ubiquitous, it's easy to find third-party plugins for integrations you need (although you'll probably need to pay for them) or to find someone who can custom build one for you.
Ease of Migration	🙂 Good	You'll find content migration easy in WordPress—plugins and accelerators for getting content into and out of the platform abound. While simple tools to migrate via Excel or .csv can be very powerful, be prepared to POC those tools to ensure you're getting the right results.
Governance & Workflow	😐 OK	WordPress is generally built for teams that have just one or two site editors. That said, it does have permissions and can manage multiple sites and languages just fine. Content versioning and workflows are a bit of a weak spot, although you can add plugins to expand the core feature set.
Cost	🙂 Excellent	Because WordPress is open source, it's therefore license-free. WordPress is never entirely without cost—you'll need to plan for hosting and for discrete plugin licenses as you build your site.
Support	😐 OK	Don't expect WordPress corporate to pick up your calls any time something goes wrong with your site. That said, an extensive partner network means there's usually someone capable of helping you solve a problem. If you use a WordPress-focused web hosting solution like WPEngine, you will gain access to WP-specific support.

Drupal

Drupal is a powerful open-source platform with a diverse set of plugins and a validated partner program. The component-based architecture is an easy fit for many mid-market companies looking to migrate. However, it may be over-complex for some use cases.

Criteria	Rating	Analysis
Content Flexibility	☺ Good	Drupal's drag-and-drop Layout Builder is paired with a modular method of building and storing content to provide a broad range of flexibility for content authors.
Marketing Capabilities	☺ Good	Drupal's Marketing Automation and Personalization options can be configured to meet some marketing needs. The popular Drupal-based PaaS, Acquia, is among the most capable DXP platforms on the market. If marketing automation, personalization, AI, and machine learning are on your radar, consider a second look at Acquia Marketing Cloud.
OOB vs Customization	☺ Good	While Drupal is incredibly powerful, there are a multitude of ways to architect and develop common design patterns. Teams may want to take advantage of some of the starting Themes & Modules available on the Drupal "Download & Extend" catalog.
Integration Capabilities	☺ Excellent	Because Drupal is driven by its active developer community, its API frameworks are mature and easy to integrate. Connectors are also available for many platforms.
Ease of Migration	😐 OK	The ease of your migration may have to do with how you ultimately architect this solution. Depending on how creative your architects are, it's possible to develop ways to bulk upload content at scale—just don't expect to do that out of the box. Some marketplace accelerators may help expedite the process, but make sure they're a good fit for your use case.

Drupal (cont.)

Criteria	Rating	Analysis
Governance & Workflow	🙂 Good	While Drupal's Workflow and Content Moderation modules are not technically part of the default Core setup, they are easily added and extended to fully adapt with to any of your team's needed permissions and content stages.
Cost	🙂 Excellent	While nothing is free, the value-to-cost ratio is extremely high with a product like Drupal when well-built and well-architected. Hosting, some plugins/extensions, and, of course, partner fees will still add up on your Drupal execution.
Support	😐 OK	There's no real centralized support for the Drupal platform itself; you'll be relying on your Drupal partner to guide you through any bugs or issues. Consider Acquia for more traditional support and, if needed, full PaaS plans.

HubSpot CMS Hub

HubSpot was designed to make content authoring easy. The platform can support the majority of a mid-market company's use cases without plugins and with minimal customization, and its consolidated architecture simplifies implementation and integration. While more costly than open-source options, you're paying for ease of use.

Criteria	Rating	Analysis
Content Flexibility	Excellent	HubSpot's intuitive Drag-and-Drop interface and its approach to Modules, Templates, and Themes can get you very close to a no-code development experience. While flexibility is difficult to quantify, content authors find HubSpot CMS Hub incredibly approachable. The whole concept and structure of HubSpot themes is geared towards making content authoring and editing easy for the marketer, with a goal of not needing to rely on a developer for day-to-day updates.
Marketing Capabilities	Excellent/Good	Your answer may vary depending on how you leverage the HubSpot ecosystem, but the platform encompasses a highly capable Digital Marketing suite that extends into CRM and Service functions as well. Tapping into Workflows can unlock powerful automation capabilities, and Smart Content based on user Contact properties is incredibly intuitive. Progressive forms, automated social media features, and a full custom email solution help to cover the marketing bases as well.
OOB vs Customization	Good	You can do a lot with HubSpot's basic modules. Purchasing a Theme from the marketplace can get you even further, and, in many cases, up and running without custom development. However, be prepared to rebuild and architect any complex web applications or functionality when needing to utilize HubDB or integrating with other 3rd party solutions.

Hubspot CMS Hub (cont.)

Criteria	Rating	Analysis
Integration Capabilities	Excellent/Good	One of HubSpot CMS Hub's biggest perks is its ready-to-use integration with the rest of the HubSpot ecosystem. If you're already a HubSpot Marketing or Sales Hub user (or are looking to become one), bump this up to an "Excellent." Standard API capabilities and some connectors can be a great fit for many organizations.
Ease of Migration	OK	While HubSpot has some migration capabilities, it's likely you'll be recreating a large portion website within the platform, page-by-page. Consider using Dynamic Page content (which can be fed by HubDB, Products, or other custom objects) to expedite upload of structured content.
Governance & Workflow	Good	HubSpot's extensive permissions capabilities help make up for gaps in approval workflows and content publishing. However, new updates to features like Content Staging and Timed Publishes are helping to flesh out these gaps.
Cost	Good	Compared to the open-source options in this list, HubSpot CMS Hub may feel somewhat costly – particularly when getting into the Enterprise tier. That said, HubSpot causes less sticker shock than many other CMS players. Consider the benefits received from the other items in this list. The newer CMS Starter option can get you in the door for cheaper than many open-source routes but does limit the amount of content you can create.
Support	Excellent	You'll be locked into HubSpot's platform (with no on-premises option) but, in exchange, HubSpot's responsive customer support will be at your fingertips.

Sitecore Experience Platform

An extensive platform with an almost an endless amount of architectural flexibility and a robust marketing platform, Sitecore is as easy or difficult to use as your implementation partner builds it to be. Before investing in Sitecore's licensing, mid-market organizations should be ready to invest time and talent into using the broad suite of tools to their full capacity—and understand that these powerful tools demand a smart solution partner.

Criteria	Rating	Analysis
Content Flexibility	☺ Good	Sitecore's modular approach to page building provides architects and content authors with all the tools needed to build out templates that are as flexible (or, if it suits you, as rigid) as desired. Like many things with Sitecore, how it is architected plays a major role in how useable the platform is for the team, so take care in constructing content and design patterns that are scalable and address your edge cases.
Marketing Capabilities	☺ Good	Assuming you spring for Sitecore Experience Platform (XP), you'll be handed the keys to a very powerful suite of personalization, marketing, and automation capabilities. Before you jump in, be sure you're ready to invest the time, training, and ongoing attention needed to get the most out of these in-depth tools.
OOB vs Customization	😐 OK	Sitecore's base implementation is a blank slate, which can be good and bad. You'll build every content pattern—even the most common, like a banner—from scratch. But don't panic yet! Sitecore Experience Accelerator (SXA) offers a set of pre-baked, common site elements and components as a starting point. Evaluate this offering to see if it fits your site's needs.
Integration Capabilities	☺ Good	Sitecore boasts the ability to leverage its Rest APIs as a headless architecture, though we recommend running a POC to ensure you're getting everything you're looking for with that structure. A number of common connectors with platforms like Salesforce Marketing Cloud and Dynamics help to extend Sitecore's marketing functions into your broader martech and salestech ecosystems.

Sitecore (cont.)

Criteria	Rating	Analysis
Ease of Migration	OK	Rarely is a Sitecore migration totally plug-and-play, though your mileage may vary. Depending on how creative your architects are, it's possible to develop ways to bulk upload content at scale—just don't expect to do that out of the box. Work with your solution team to understand how to minimize the rebuilding and migration effort.
Governance & Workflow	Excellent	Sitecore is a pro at handling multiple sites and a wide set of permissions—though the range of options can be a bit overwhelming. The workflow capability for managing content releases is among the best on this list; the out-of-the-box features may be enough, or you can look to extend with additional steps, triggers, and notification options.
Cost	Poor	Get ready to pull out your pocketbook for your Sitecore implementation, along with the partners who support it. You'll be paying for a high-end mid-market tool with the ability to scale into an enterprise-level operation with ease, so take that into consideration when reviewing Sitecore as a platform.
Support	Good	Consider Sitecore Managed Services if you're looking for responsive support and ongoing help with the likes of upgrades and new features. Sitecore's partner network is rich and accessible as well, so you'll have plenty of backup to call in case you run into roadblocks.

Finding the right CMS implementation partner

CMS vendors typically aren't in the business of building websites—and even if they are, the needs of the mid-market will quickly out-scale their in-house capacity. That's why most CMS vendors have partner networks that can manage migrations on their behalf. In the case of the examples we used above, WordPress does not have an official directory of partners, but Drupal, HubSpot, and Sitecore do publish their lists.

Partner networks typically tier their partners based on their experience—often based on both projects completed and certifications—and categorize partners based on different areas of expertise. When you decide on a new CMS, search for an implementation partner with expertise in that platform. Your previous vendor—or even your own in-house IT team—may not have the background to get the most out of your new tool.

Putting it all together

Based on our examples and the worksheet in Appendix A, you may be well on your way to rolling out a new CMS by next week.

But, if you're like most mid-market companies, that's probably not your story.

We get it. Finding the right CMS for a mid-market use case can be complicated, and most companies can benefit from a little bit of outside perspective. Our team of vendor- and platform-agnostic CMS experts knows the ins and outs of platform discovery, rationalization, building use cases, and facilitating productive tech discussions across the business.

Get some free advice

Have a specific question about pricing or licensing, need an inside scoop on a particular platform, or aren't sure what to do about cloud hosting? We can help. Set up a 30-minute consult with one of our CMS experts to get your question answered—free.

ASK US ANYTHING →

Develop your CMS scorecard

If you're ready to get more concrete about your CMS selection, you might be ready for our CMS Scorecard Workshop. Schedule a half-day workshop or two shorter working sessions to kick off your CMS project. Depending on where you are in the process, we can help you and your key stakeholders:

» Solidify your business case for a new CMS

» Identify and prioritize key requirements

» Create a custom scorecard for CMS vendors based on your prioritized requirements

» Make the case for your platform of choice

JUMPSTART YOUR CMS PROJECT →

Appendix A:
Creating your CMS scorecard

As you evaluate CMS vendors, use this scorecard to track how well each vendor fits your prioritized needs and matches your use case. Although these criteria are most common for mid-market businesses, your unique situation may require others.

Criteria	Rating	Analysis
Content Flexibility Are modular templates & components included? Does it have WYSIWYG & drag-&-drop capabilities? Does it support your existing design patterns?		
Marketing Capabilities What type of reporting does the platform allow? How much personalization is possible? Does it include marketing automation features? Is there an integrated email function? Is any AI/ML functionality built in and/or supported?		
OOB vs Customization How much out-of-the-box support can you expect for common website functionality? Does the platform allow gated content or portals? Does the platform include headless support for custom apps?		

Criteria	Rating	Analysis
Integration Capabilities Are there built-in third-party support features? How many and what type of connectors & extensions are included? What are the platform's API capabilities for content & code? Will you need an additional integration platform?		
Ease of Migration Does the product have built-in accelerators? Are there bulk upload capabilities? Does the platform share code language or content structures with your existing CMS? What does the base configuration look like? What level of effort should you expect to integrate it into your current architecture? Is this an all-in-one package solution, or will you be piecing together a solution out of plugins & third-party add-ons?		
Governance & Workflow What level of complexity does the solution support in terms of permissions? What does content staging and preview look like? Is there a dev ops environment, and what does code management look like? What types of workflows are supported?		

Criteria	Rating	Analysis
Cost Does the vendor offer straight pricing, or will you need to negotiate a right-fit solution? What licensing fees should you budget for? How many add-ons & plug-ins will you require, & what will they cost to purchase, license, & maintain? What level of hosting is included or required? Can you find a partner to help you customize, migrate, & implement, & what will that cost?		
Support What types of support options does the vendor offer? Are there multiple tiers? How robust is the vendor's partner network? Is there a community of users you can call on for off-the-books troubleshooting?		

Appendix B:
More martech resources

WHY CHOOSING THE RIGHT CMS MATTERS →

HOW TO CHOOSE THE BEST CMS →

WHAT IT REALLY TAKES TO OPTIMIZE YOUR SITECORE SOLUTION →

THE ULTIMATE GUIDE TO CUSTOMER DATA STRATEGY →