4A's CMS Evaluation &Technology Audit

Final Presentation
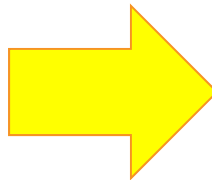
July 22, 2014

"I need someone well versed in the art of torture—do you know PowerPoint?"
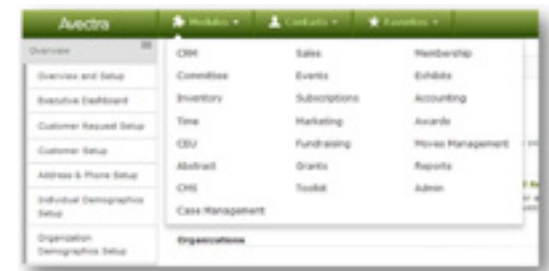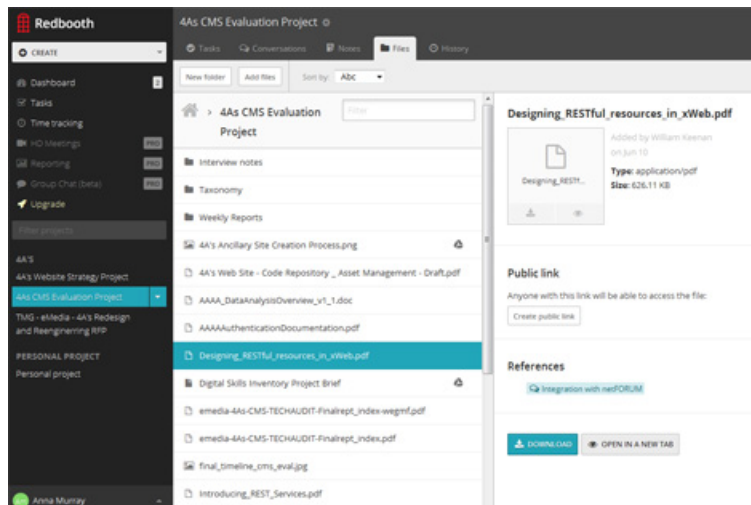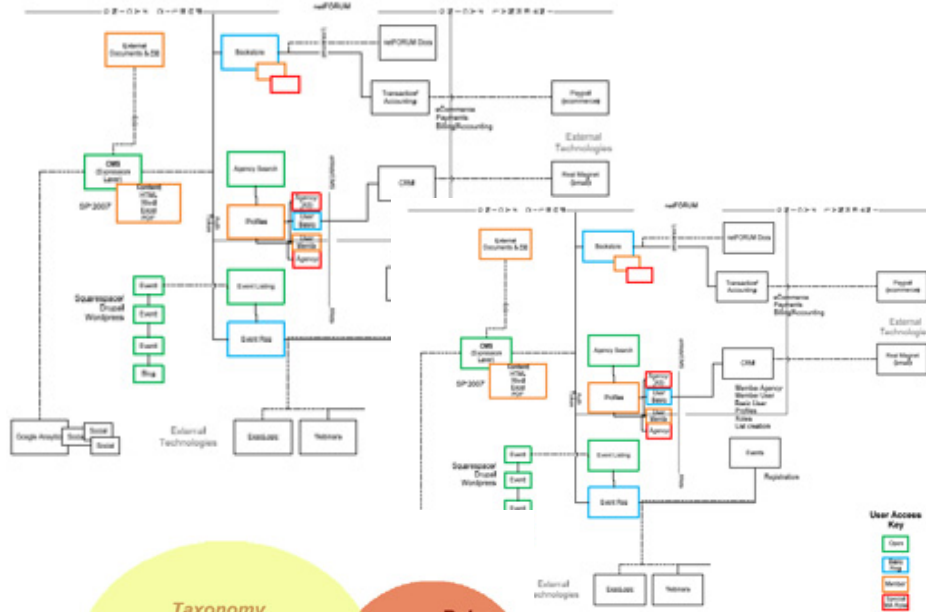
Summary of Engagement

CMS Choice?

Where We've Been

Research

14+ Source Documents
17+ Internal Interviews
11+ External Interviews

- **Current website**
- **netFORUM & other systems**
- **Future Website vision**

A close race… And the winner is:

Three Key Recommendations

1. **WordPress** as 4A's CMS platform.

2. **SharePoint** left in place (and upgraded) as appropriate for internal document-management, collaboration and workflow control.

3. **netFORUM** as continued AMS platform and **integrated with CMS via API** to the largest extent possible.

Stay with netFORUM

1. Appropriate Association Management Software.

2. Gaining strength in its space.

3. API approach solves many problems & mitigates risk.

4. Future possible change – evaluate and decide.

5. netFORUM is not (currently) an undue barrier.

6. Drawbacks with all ERP-type systems.

7. Salesforce "is free" the way a puppy "is free."

8. Cost/Time

9. Risk

Site Vision

- Publishing-centric
    - Competitive content features
    - Live
    - On demand
    - Easy to produce

- Flexible, scalable
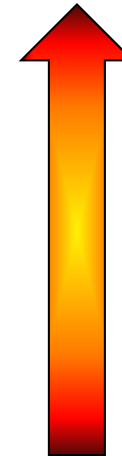
- Findable/Searchable

- Data & profiles

7 Key CMS Criteria

7 Criteria*

1. Rich content-publishing features

2. Editor ease

3. Workflow tools

4. Taxonomy tools

5. Alignment with staffing

6. Ability to integrate with netFORUM

7. Strong hosting/support

Candidate CMS Systems:

- SharePoint 2013
- Drupal
- WordPress

*Cost factor used in all assumptions and as key criterion in final recommendation.

Summary Scorecard

| Criteria	WordPress Score 25	Drupal Score 24	SPoint 2013Score 22
Rich content publishing features	4	4	4
Editor ease	4	3	2
Workflow	3	3	4
Taxonomy management	2	3	4
Match with 4A's staffing plans	4	4	2
Tools to integrate with netFORUM	4	3	2
Strong Partners	4	4	4

Taking SharePoint Off the Table

Consideration of SharePoint 2013	Pros or Cons in Remaining with SharePoint	Relative Importance
Existing Investment/ Internal Expertise	Key internal resources may prefer SharePoint.	LOW
Extensibility (SP2013 DAM, Doc management, Intranets, Workflows)	SharePoint 2013 (upgrade) can serve as a full enterprise 4A's solution.	LOW
.NET Synergy	Possible advantage similarity programm language i integration	
Co-Location	Key speed will be los move awa SharePoin	

	SharePoint	
Internal dissatisfaction/ Cultural Factors	Internal dissatisfaction with SharePoint may lead to low frustration tolerance. User-base culturally aligned with Open Source.	HIGH
Alignment with Staffing Needs and Editorial Ease	SharePoint 2013 will likely require greater technology staffing resources as compared to other CMS systems and more IT intervention in Editorial content creation.	HIGH
Enterprise-y (rather than publishing) roadmap	Publisher-friendly feature releases more likely in open source future roadmap.	HIGH

- **Cons to SharePoint**
- **2 Deal Breakers**

API Approach
(an interlude & key question)

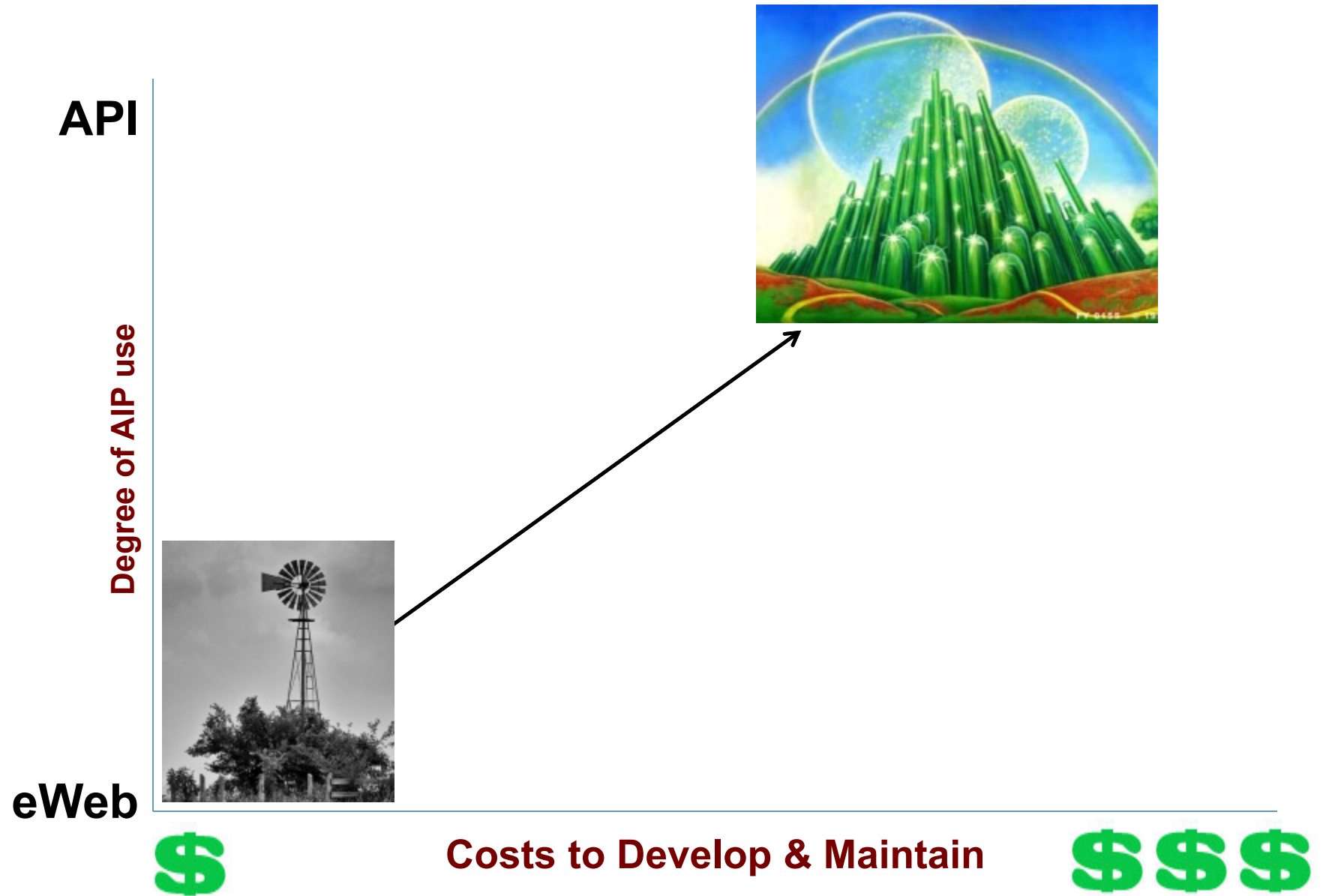## Over the wall
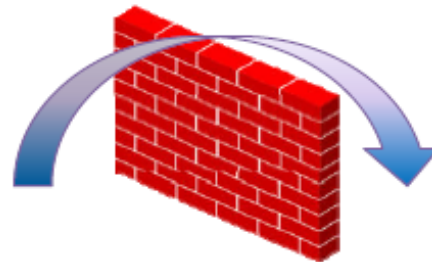
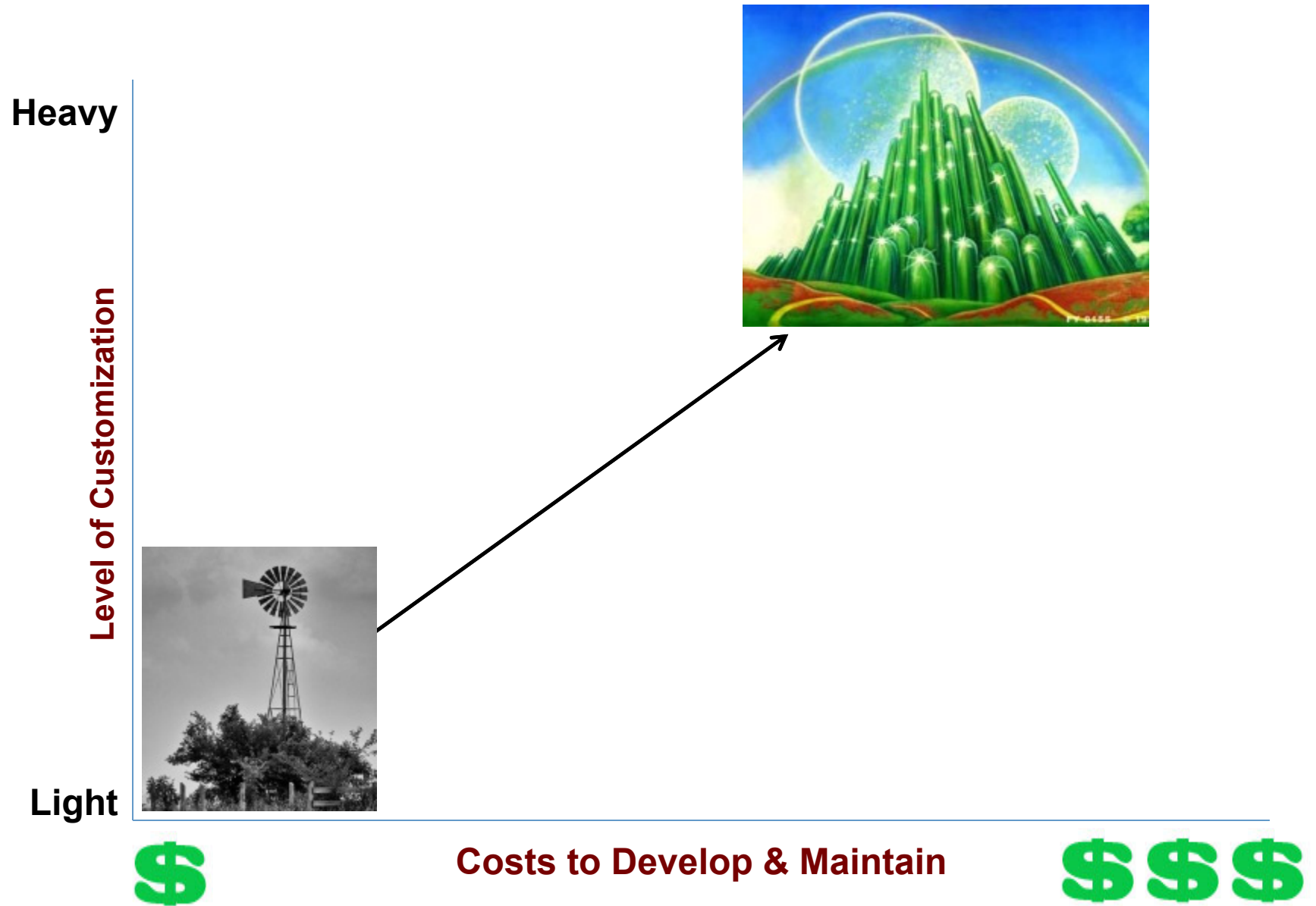**SharePoint Page**

eWeb Page

- Separate CSS
- Requires IT to create/manage
- Not mobile optimized
- Look/feel limitations
- **BUT:** No API risk/cost.

Costs & Risks: API Approach

API

Degree of AIP use

eWeb

Costs to Develop & Maintain

$ $$$

Costs & Risks: eWeb Approach

Heavy

Level of Customization

Light

$ **Costs to Develop & Maintain**   **$$$**

Why is Integration Important?

1. Choosing an integration approach has bearing on both costs and risks.

2. The ability to integrate via API with CMS is a key factor in recommendation.

Recommendation: API Approach

- Likely to achieve the best "Technicolor" result.

- Can leverage best of breed tools on all pages.

- Best editor flexibility.

- Successful AGU experience mitigates both risk and costs.

- Decreases exposure to eWeb.

- Hybrid approach is still possible.

CMS "Technicolor" Page

- Flexibility
- Editor access
- Features (e.g. ad/promotion)

Data & interaction with netFORUM
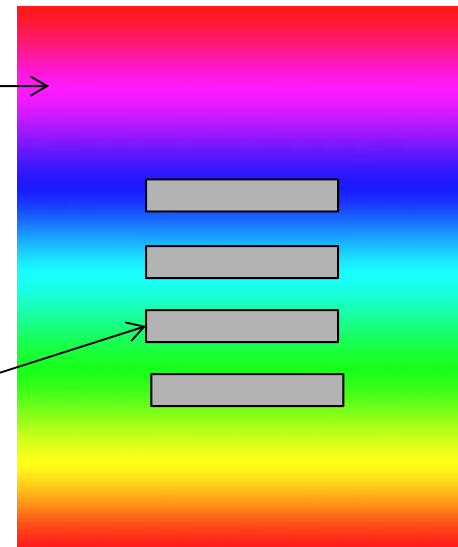
WordPress vs. Drupal: Risks & Costs

Risk	WordPress	Drupal	Risk Associated Cost	Notes
Loss of Colocation	**R**	**R**	(same)	Either system will mean a loss of co-location.
Availability of Vendor Partners	**R**		$	Wordpress has fewer available vendor partners, which may result in higher costs
Development Effort Site	**R**		$	Initial site develoment is likely to be higher in Wordpress.
Development Effort of Integration		**R**	$ $	netFORUM integration is likely to be lower in Wordpress due to AGU.
Upgrade Path		**R**	$ $ $	Significant costs associated with Drupal upgrade path.

The risks associated with Drupal are likely to be more costly than the risks associated with WordPress.

WordPress vs. Drupal: Costs

Costs	WordPress	Drupal	Notes
Site Development	$275,000	$250,000	Differing vendor comments. Cost of integration may be vendor-dependent.
Upgrade Path (2016-17)	$0	$150,000-$200,000	Drupal 7 to 8 conversion. Cost depends on customization and integration approach.
Hosting (estimated range)	$30,000-50,000	$30,000-50,000	Hosting costs are likely the same depending on partner and implementation strategy.

**Drupal has a "stair step" upgrade path.
With WordPress, "backward compatibility is assured."**

So! Our Final Answer Is…

- Although both Drupal and WordPress will meet key requirements (7 Criteria)

- **WordPress bests Drupal on two key factors:**

  - Drupal's costly upgrade path.

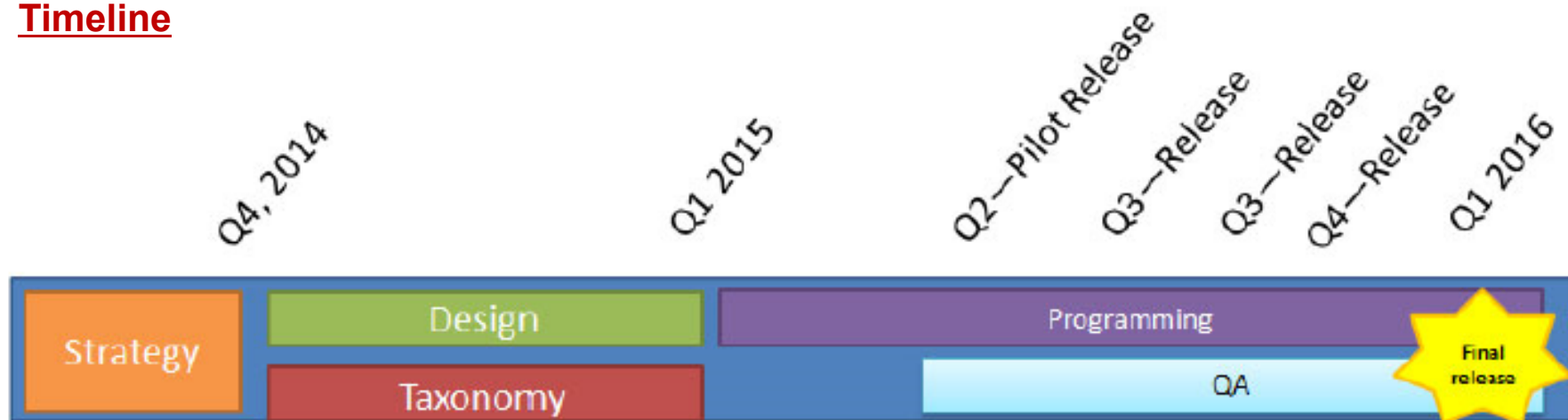 - WordPress' likely advantage in netFORUM integration.

Down The Yellow Brick Road...

Resources

- WordPress development partner (e.g. VML or other) with specific WordPress enterprise expertise.
- WordPress netFORUM integration partner (e.g., Pongos/Benel).
- Data-migration requirements.
- Third-party testing partners.
- Internal-to-the-4A's resources to address:
    - User acceptance testing.
    - Taxonomy team (under way).
    - Content-review team.
- Business Analysis.
- Program and Project Management.
- Change Management and Documentation.
- Infrastructure Consulting and Support.
- Training and Handoff.

Timeline

Q4, 2014   Q1 2015   Q2—Pilot Release   Q3—Release   Q3—Release   Q4—Release   Q1 2016

Strategy | Design | Taxonomy | Programming | QA | Final release

Thank you!

It has been a real pleasure and honor working with you!

Great team!

Great professionals!

Great spirit!