Buy or Build: the Story of a CMS

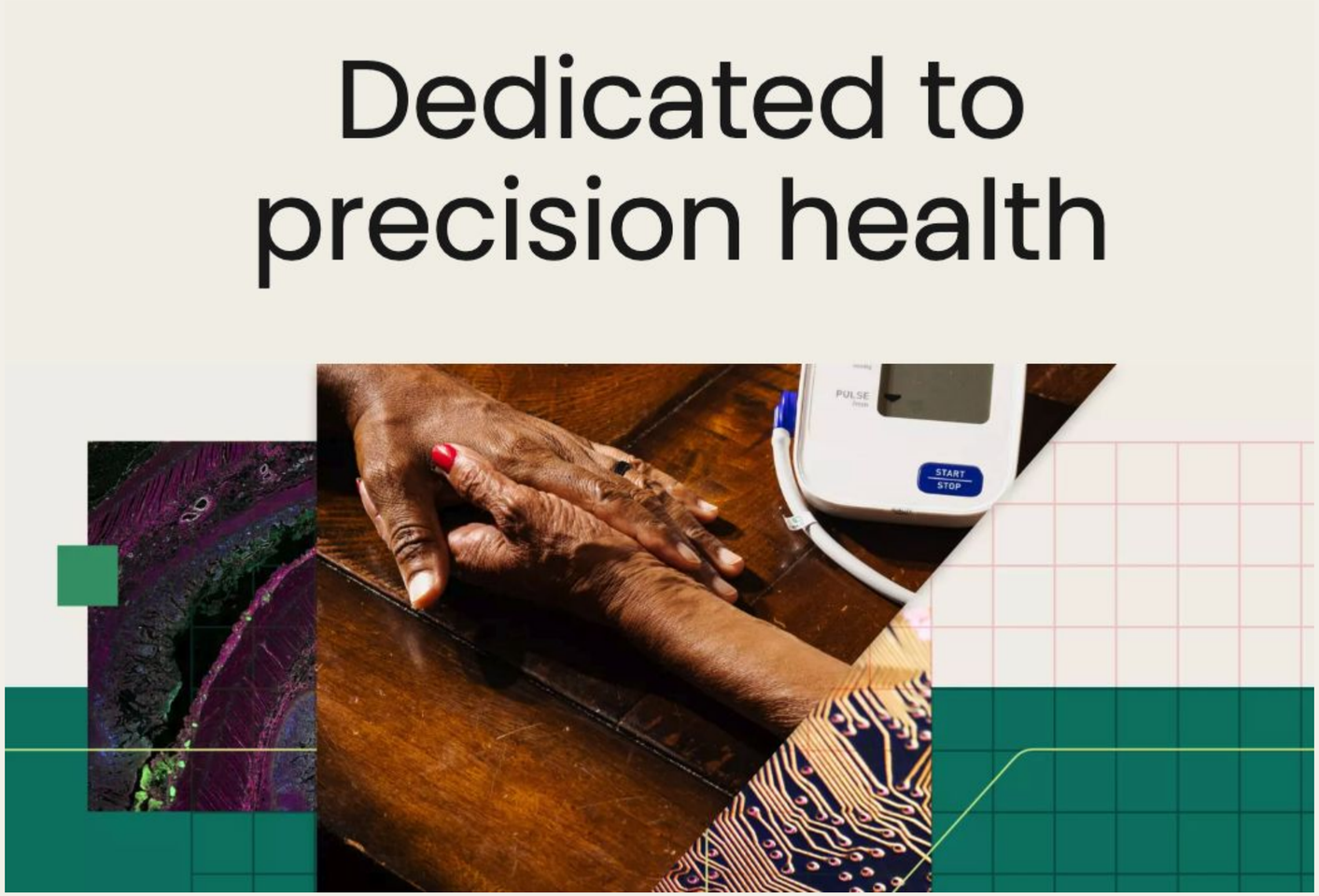
Marli Mesibov
marlim@verily.com

01 Why I’m here
02 The need for a CMS
03 Build or buy
04 The process
05 The decision
06 What’s next

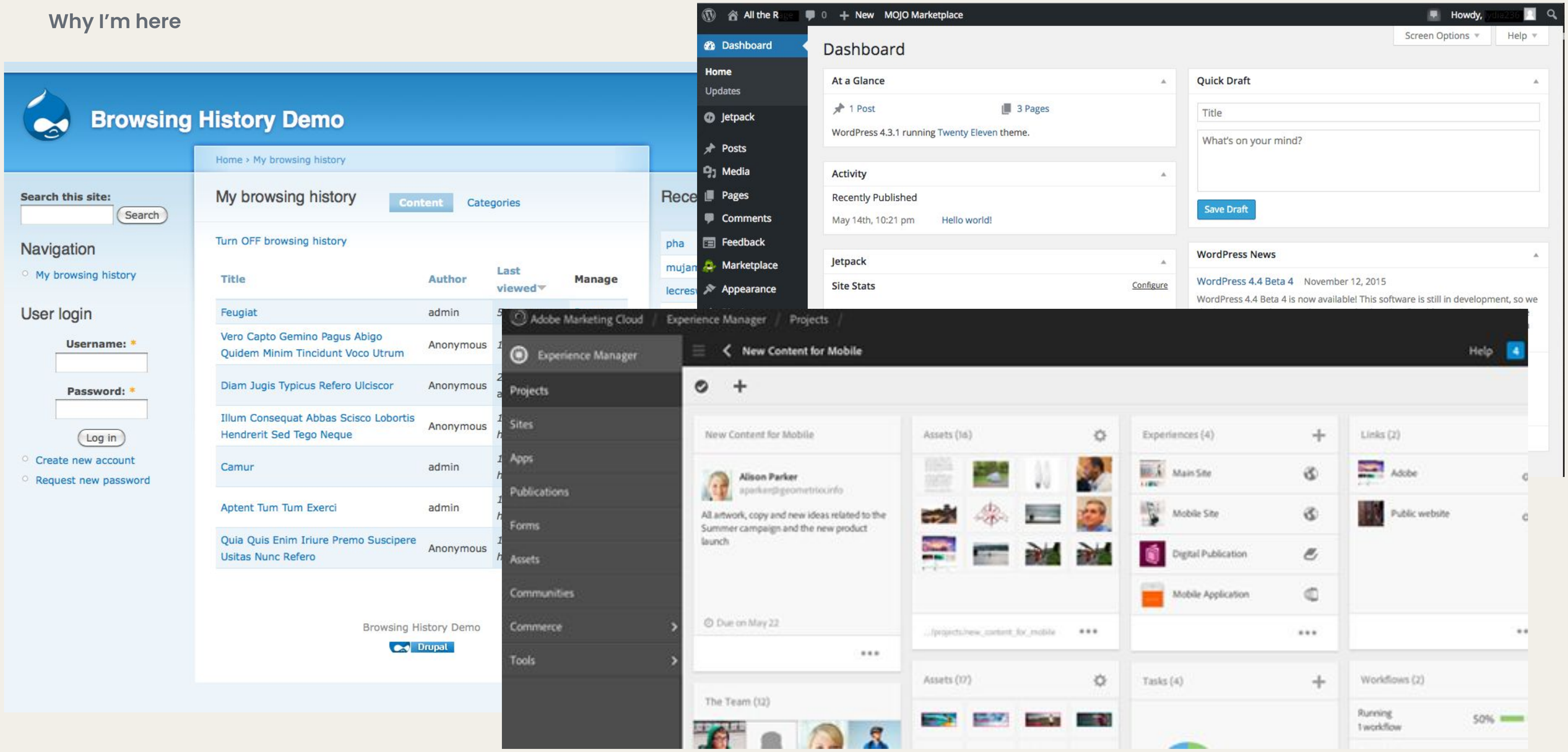
Why I’m here

Marli Mesibov

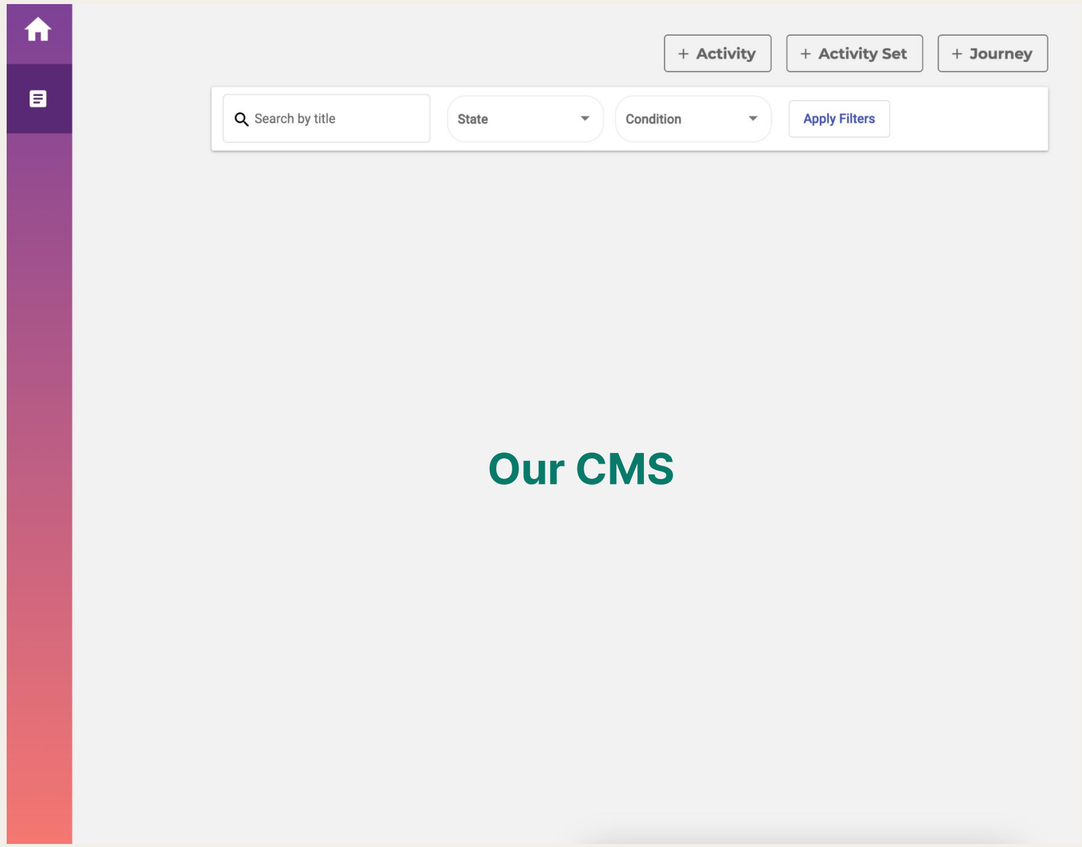
Content design lead
Verily



Why I'm here

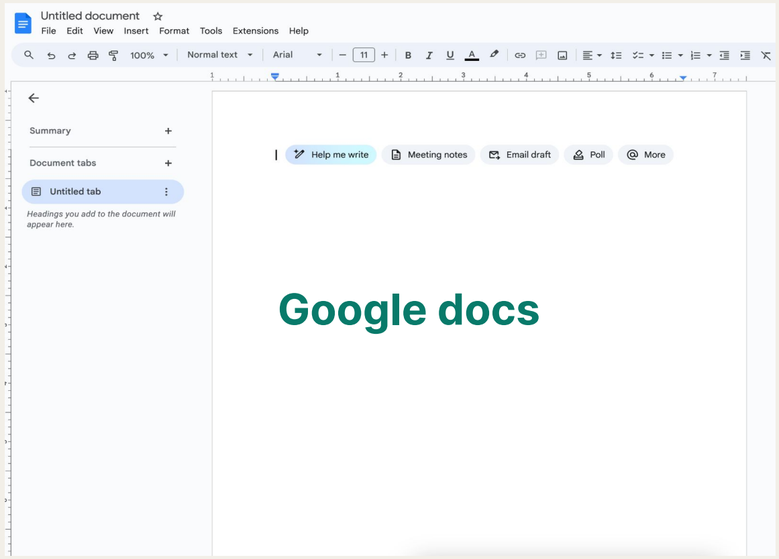

Browsing History Demo
Home › My browsing history
Search this site:
Search
Navigation
My browsing history
User login
Username: *
Password: *
Log in
Create new account
Request new password
My browsing history
Content
Categories
Turn OFF browsing history
Title
Author
Last viewed
Manage
Feugiat
admin
Vero Capto Gemino Pagus Abigo Quidem Minim Tincidunt Voco Utrum
Anonymous
Diam Jugis Typicus Refero Ulciscor
Anonymous
Illum Consequat Abbas Scisco Lobortis Hendrerit Sed Tego Neque
Anonymous
Camur
admin
Aptent Tum Tum Exerci
admin
Quia Quis Enim Iriure Premo Suscipere Usitas Nunc Refero
Anonymous
Browsing History Demo
Drupal
All the R
0
New
MOJO Marketplace
Howdy,
Screen Options
Help
Dashboard
Home
Updates
Jetpack
Posts
Media
Pages
Comments
Feedback
Marketplace
Appearance
At a Glance
1 Post
3 Pages
WordPress 4.3.1 running Twenty Eleven theme.
Activity
Recently Published
May 14th, 10:21 pm
Hello world!
Jetpack
Site Stats
Configure
Quick Draft
Title
What's on your mind?
Save Draft
WordPress News
WordPress 4.4 Beta 4
November 12, 2015
WordPress 4.4 Beta 4 is now available! This software is still in development, so we
Adobe Marketing Cloud
Experience Manager
Projects
Experience Manager
Projects
Sites
Apps
Publications
Forms
Assets
Communities
Commerce
Tools
New Content for Mobile
Help
New Content for Mobile
Alison Parker
All artwork, copy and new ideas related to the Summer campaign and the new product launch
Due on May 22
Assets (16)
Experiences (4)
Main Site
Mobile Site
Digital Publication
Mobile Application
Links (2)
Adobe
Public website
Assets (17)
Tasks (4)
Workflows (2)
Running
1 workflow
50%
The Team (12)

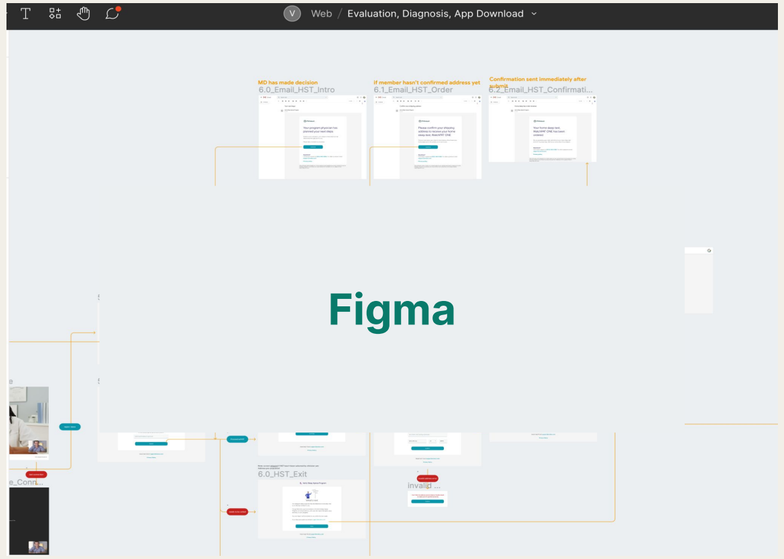
Is it really a CMS…

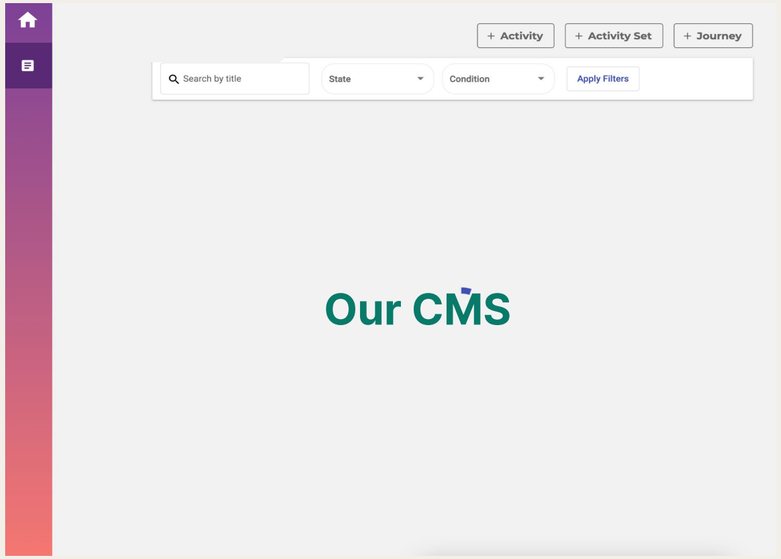


Why I'm here

…or a publishing system?







01 Why I’m here
02 The need for a CMS
03 Build or buy
04 The process
05 The decision
06 What’s next

Why did Verily need a CMS?

1.

2.

3.

4.

5.

6.

7.

8.

9.

Why did Verily need a CMS?

1. Publish without coding

Content designers required engineers to launch most copy updates

2. Content approvals

Reviews and approvals were happening in Google docs and tracked in spreadsheets

3. Reusable content

Although Verily had five products sharing content, it was being copy/pasted across them

4. “Locked” content

5. Rich content editor support

6. L10n support

7. Preview ability

8. External users

9. Change management/auditing

Why did Verily need a CMS?

1. Publish without coding

Content designers required engineers to launch most copy updates

2. Content approvals

Reviews and approvals were happening in Google docs and tracked in spreadsheets

3. Reusable content

Although Verily had five products sharing content, it was being copy/pasted across them

4. “Locked” content

For regulatory reasons, health content must be uneditable once it is approved

5. Rich content editor support

Content designers were unable to bold, italicize, or link copy in our current CMS solution

6. L10n support

Localization required a separate process, involving downloading and re-uploading to the CMS

7. Preview ability

8. External users

9. Change management/auditing

Why did Verily need a CMS?

1. Publish without coding

Content designers required engineers to launch most copy updates

2. Content approvals

Reviews and approvals were happening in Google docs and tracked in spreadsheets

3. Reusable content

Although Verily had five products sharing content, it was being copy/pasted across them

4. “Locked” content

For regulatory reasons, health content must be uneditable once it is approved

5. Rich content editor support

Content designers were unable to bold, italicize, or link copy in our current CMS solution

6. L10n support

Localization required a separate process, involving downloading and re-uploading to the CMS

7. Preview ability

Content designers couldn’t see how content would look to users (hence using Figma)

8. External users

Verily was considering partnerships where others would create content for our products

9. Change management/auditing

Health content must be time stamped with all edits, reviews, and approvals

01 Why I’m here
02 The need for a CMS
03 Build or buy
04 The process
05 The decision
06 What’s next

To buy or to build

Benefits to buying

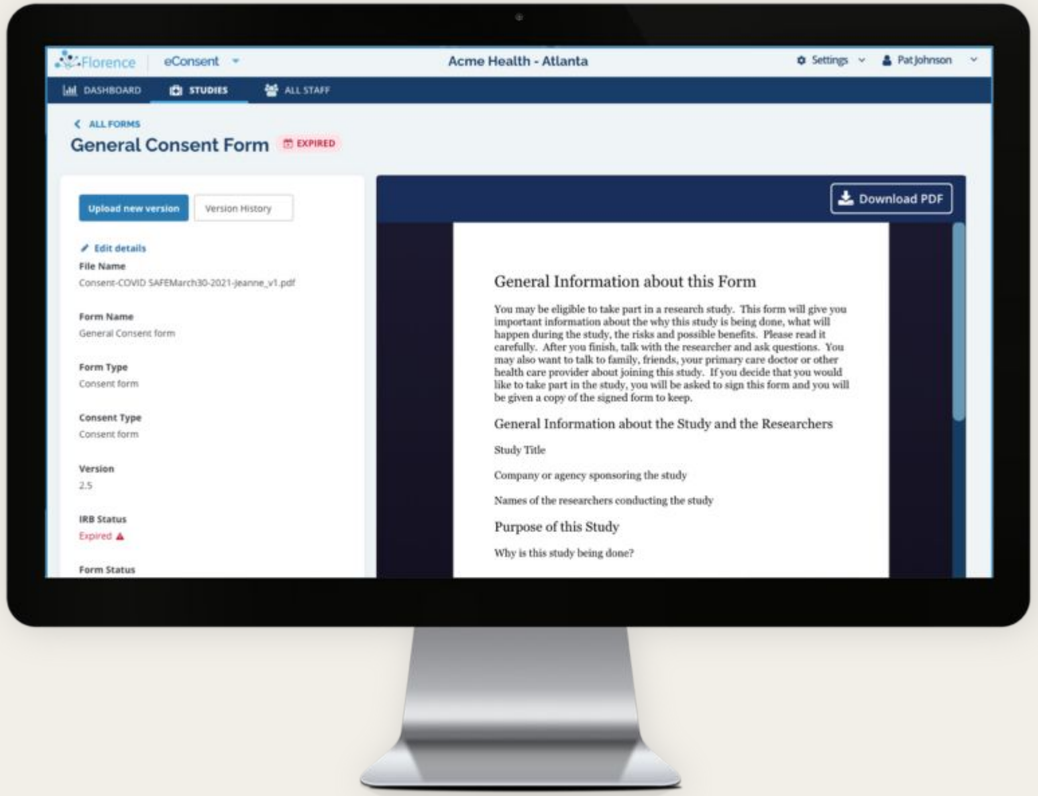
- Allows internal resources to focus elsewhere
- Likely to be cheaper in the long run
- Reduce internal compliance risks
- “Off the shelf” means having more functionality on day one

Benefits to building

- Full control over exactly what we want in our CMS
- Ensure we are compliant with FDA Part 11
- No prolonged product reviews with Legal, Regulatory, and our Sourcing department
- Easier to integrate with our tools and products

Florence healthcare

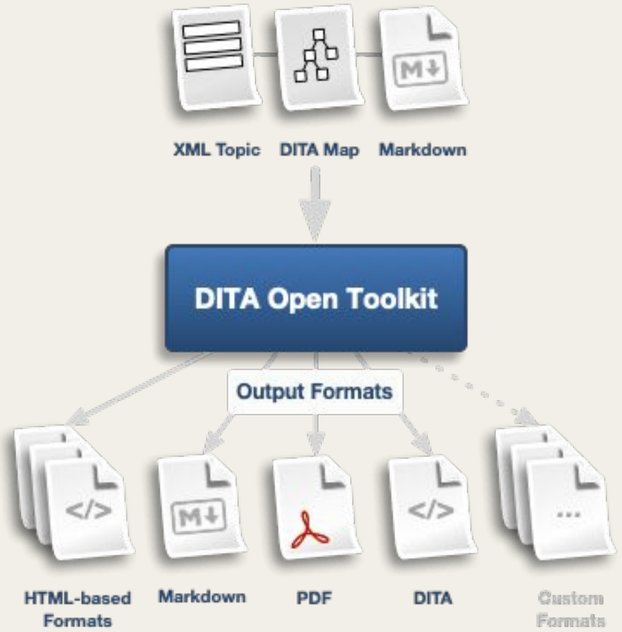
Beyond content management solutions for econsent, Florence offers other non-content solutions that help in trials, like eTMF.



florence™

DITA

DITA offers open source content authoring, rendering framework, and could be integrated with an internally developed CMS.



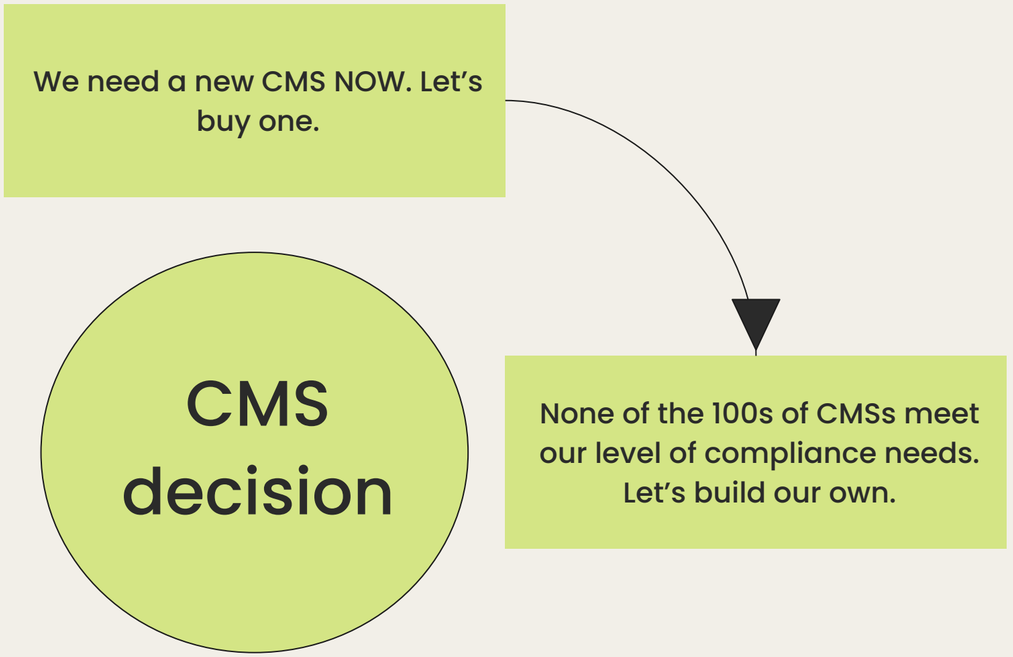
DITA Open Toolkit

To buy or to build

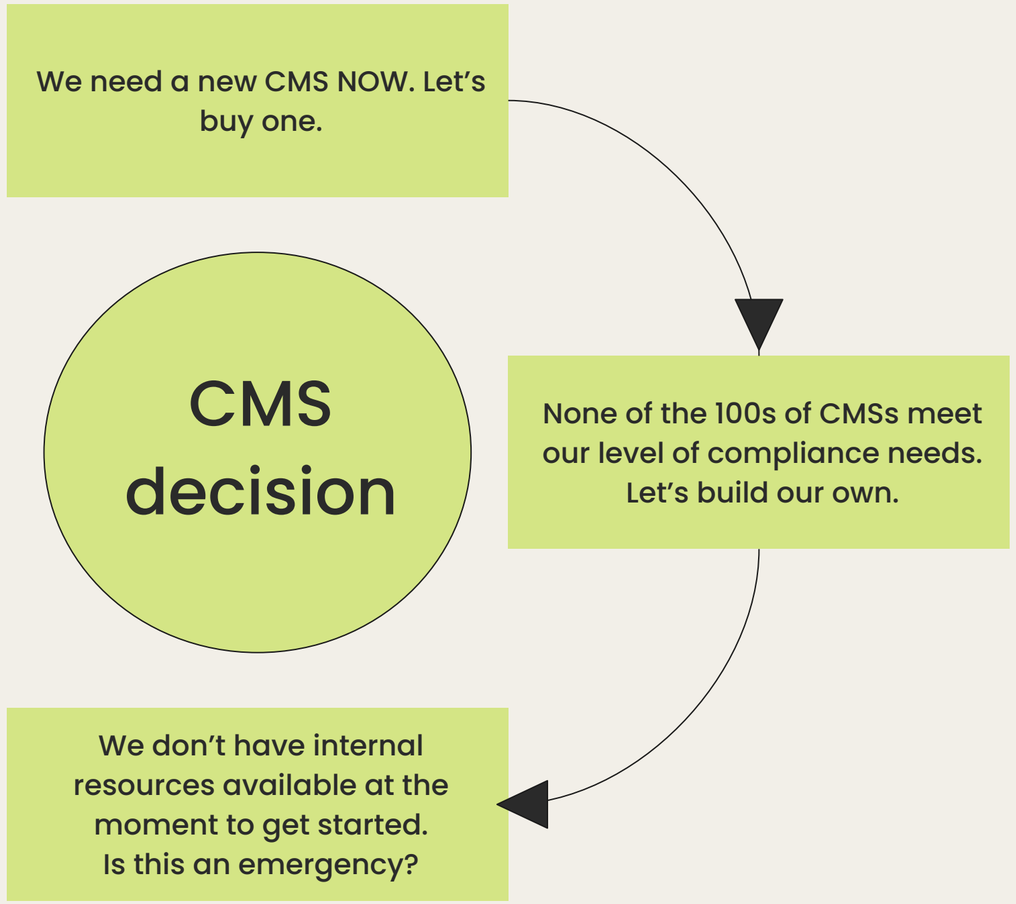
We need a new CMS NOW. Let’s buy one.

CMS decision

To buy or to build

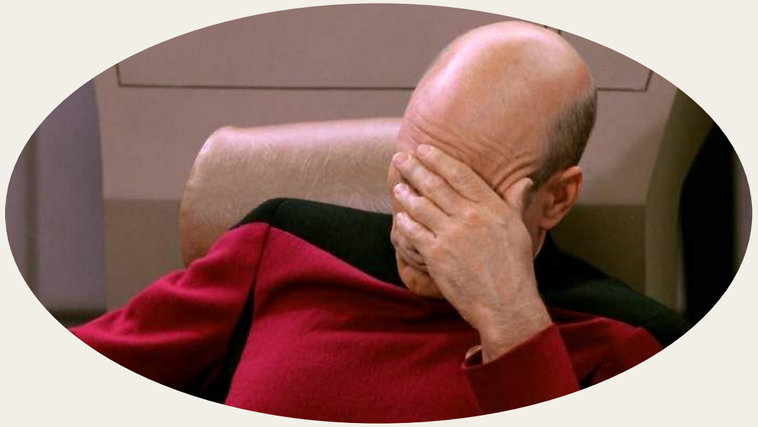


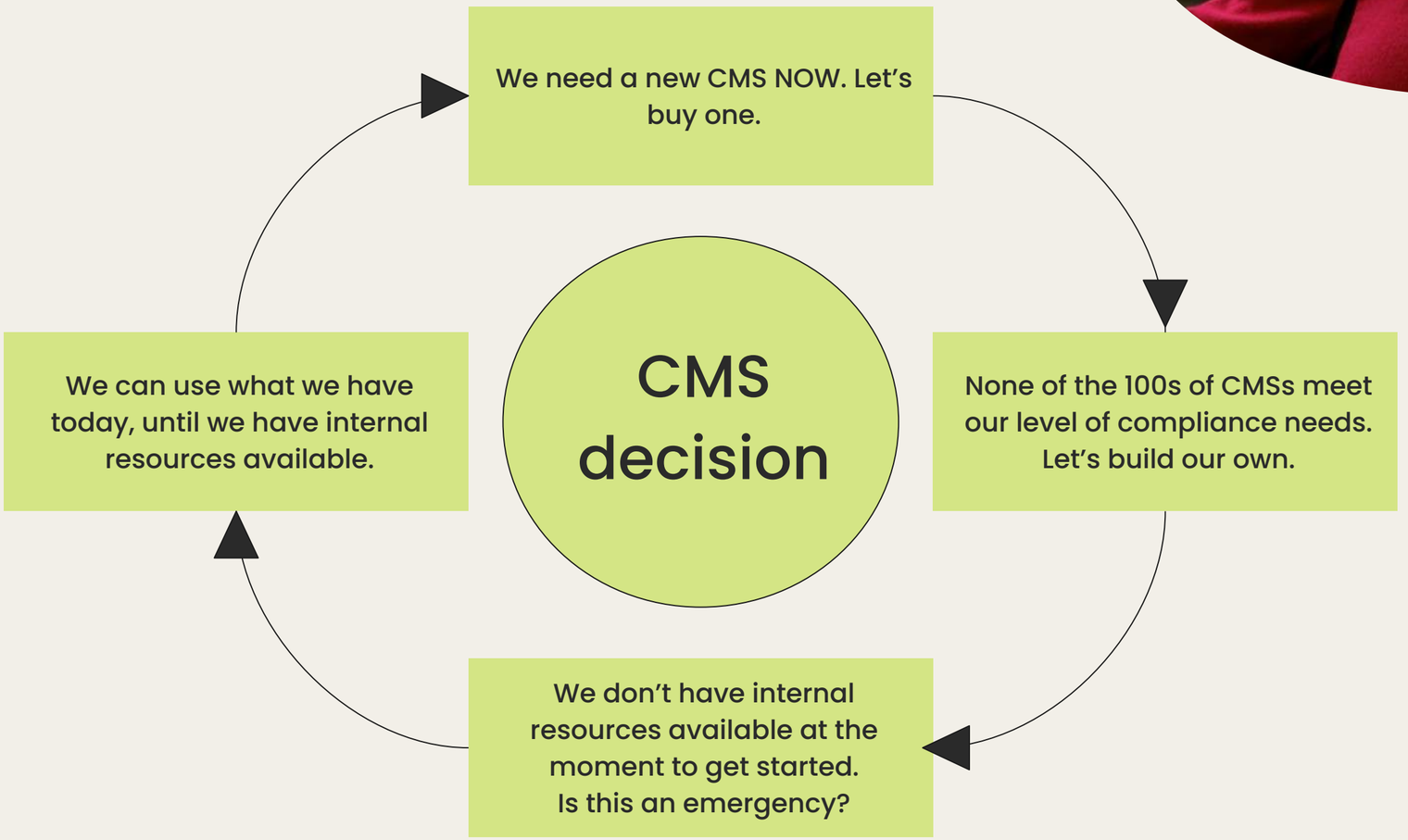
To buy or to build



Pros and cons

To buy or to build





01 Why I’m here
02 The need for a CMS
03 Build or buy
04 The process
05 The decision
06 What’s next

BOYE & CO

Groups Conferences Consulting

Empowering editors to design their best content

November 29, 2023

By Janus Boye

Empowering editors to design their best content is difficult. Content design may be at the bottom of their to-do list. The CMS is just another system they have to learn how to use. Published outputs are the end goal. When they can't publish content the way they want, they settle for less or they go outside the platform.

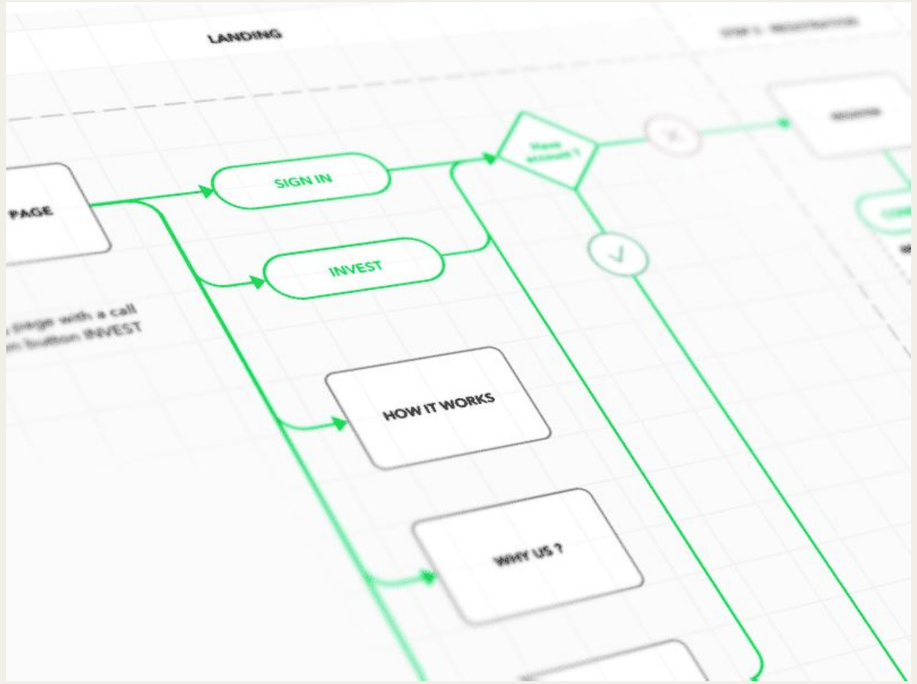
But what if editors were involved in continually shaping the CMS? What if their natural workflows informed the set-up? What if instead of hacking features to fix content issues, there was a way to develop something more intuitive to their needs?

Emma Horrell is User Experience Manager at the University of Edinburgh

Workshop time!

Success metrics

- A list of requirements, detailed enough to create a presentation to share with a 3rd party evaluator
- Clear, agreed-upon understanding of what functionality we need a tool to have, to successfully be our CMS, including:
  - A list of user flows
  - Roles and responsibilities

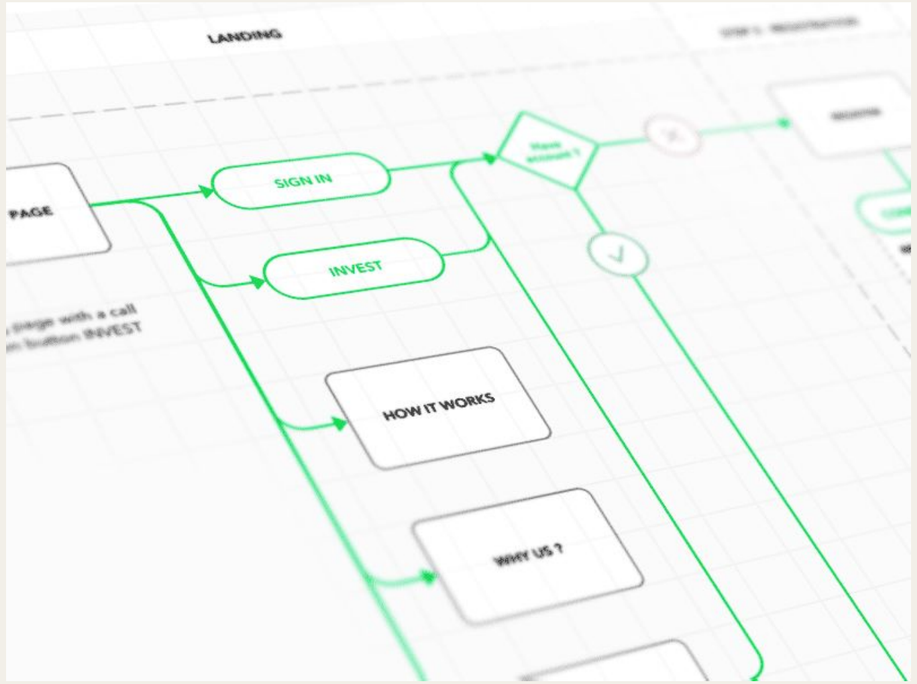


Definitions

CMS: a software application that allows users to build and manage website or app content without having to know how to code.

Role: something that an Admin can assign someone, a Role comes with certain capabilities that support their ability to accomplish tasks. A role may belong to many job titles, but has the same capabilities across products.

E.g. Roles: Author, Publisher, Editor
Job titles: Content Designer, UX Writer, Copywriter



Agenda

1. Lightning talks, to align on existing product needs
2. Discuss roles (Author, Reviewer, Publisher, Admin)
3. Break into groups and craft user flows for each role
4. Identify requirements per user flow

Author

I want to revise content based on editor feedback

Day One: Icebreaker

1 Icebreaker

15min (5min creation, 10min shareback)

What do you look for in a content management system? What's your "bare bones" experience, what's the "just right" experience, and what's the "overkill" experience?

	Bare Bones	Just right	Overkill
	Motel 6	Hilton	Club Med
	Plastic grocery bag	Canvas tote	Designer handbag
	American cheese	Vermont Cheddar	Aged Gruyere

Day One: Lightning talks

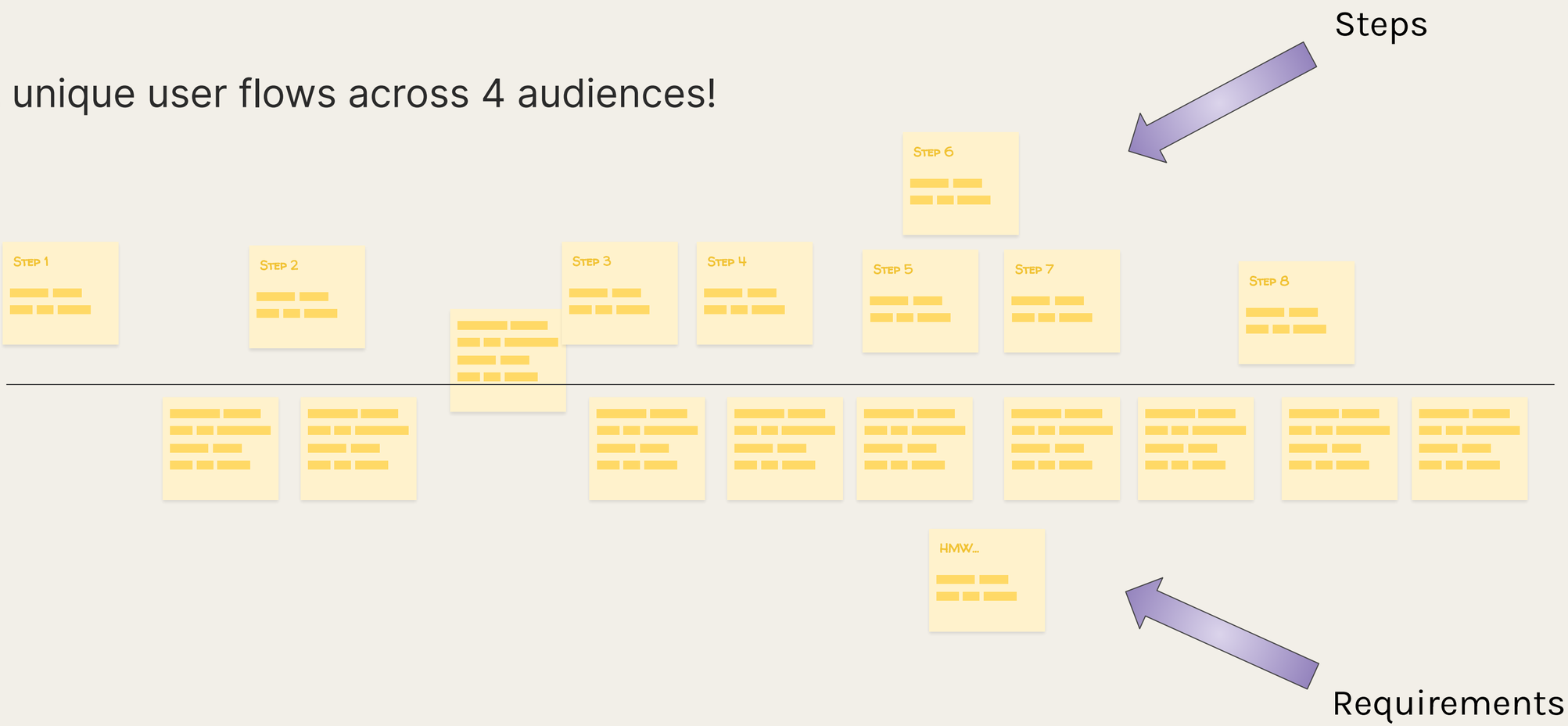
With four different teams using four different homegrown “content management systems”, all with different goals, features, and priorities, we had a lot to learn from one another.

Day One: User flows

We identified **32** unique user flows across 4 audiences!

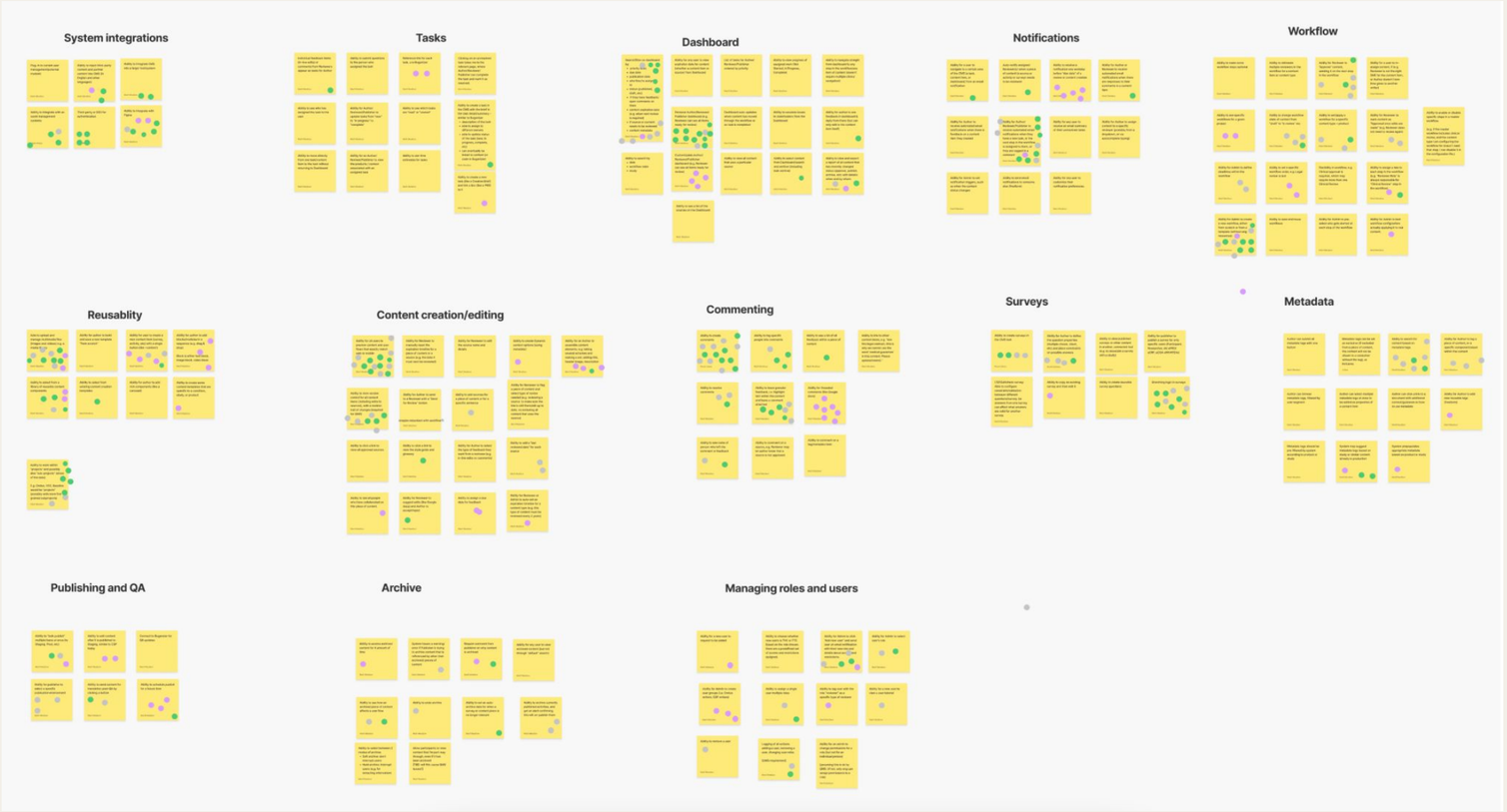
Author

I want to revise content based on editor feedback



Day Two: Requirements

We identified **142** unique requirements.

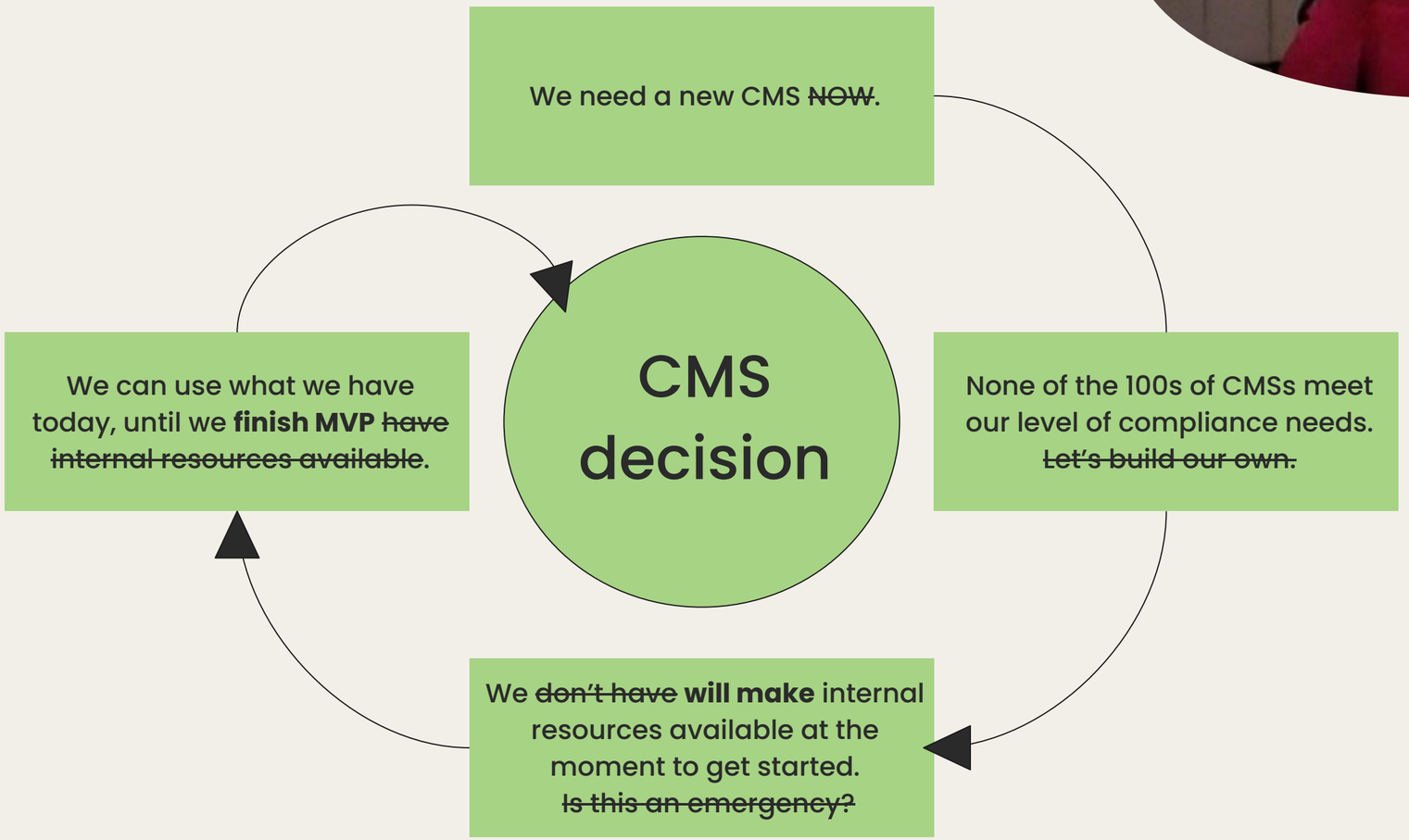


Day Two: Prioritization: voting and discussion

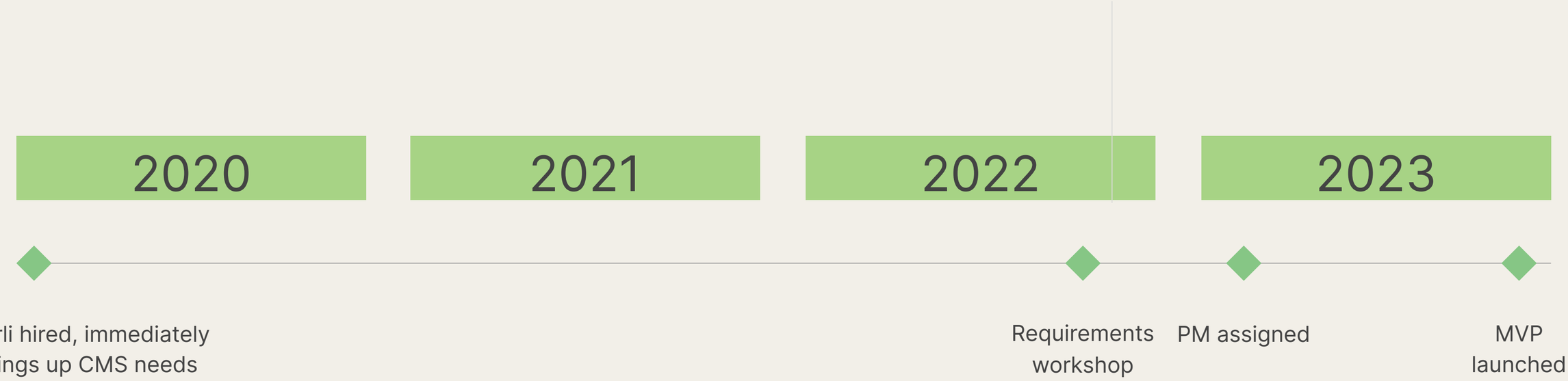
- What are the highest priorities?
- What are the lowest?
- Were any priorities not voted for that you feel are particularly important?

01 Why I’m here
02 The need for a CMS
03 Build or buy
04 The process
05 The decision
06 What’s next

We’re gonna build it!



Put it on the roadmap



01 Why I’m here
02 The need for a CMS
03 Build or buy
04 The process
05 The decision
06 What’s next

Where do we go from here?

- Expand reviews in the CMS
- Integrate with Figma
- Integrate with additional products
- Expand user permissions

What are the key requirements for distinct audiences? How do you determine your audience?

verily

Thank you

marlim@verily.com