dotcms

RFP TEMPLATE

CONTENT MANAGEMENT SYSTEM

This RFP template is designed to help companies quickly identify the vendors that meet their needs.

RFP Template for Content Management System (CMS)

The process of creating an RFP involves looking deeply into your company processes and your plans for growth. Make sure you've assessed every aspect of your company to help you identify how your potential vendor and the CMS will help you achieve those goals. Once you've done that, you will have gained knowledge about your company and can advance towards the actual RFP.

The best RFP is the one that helps both you and your CMS vendor assess each other's needs, capabilities, and potential. Here's an RFP template you can use to find the perfect CMS vendor for your project.

Company Information

RFP: **[Company Name]**	Proposal Due By: **[Date]**	**[Company Name]**
Company Overview: [Your company overview goes here]		
Goals You Want To Achieve Using a CMS ● Goal 1		
Scope of Work: *[Describe your scope of work in detail. What you do, who you serve, and how you do it]*		
Current Roadblocks and Barriers to Success ● Roadblock 1		
KPIs and Criteria for Success ● Criteria #1		
Requirements CMS Vendors Need To Have Before Submitting ● Requirement #1		
Project Due By: **[Enter Project Due Date]**		Budget: **[Amount]**

Vendor Information

Questions	Your CMS Vendor's Answer
What is the name of your product?	
Can you share your product vision?	
What is the key value proposition of your product?	
What are the most common business challenges your CMS helps to solve?	
Can you list your three strongest competitors and what your key differentiators are?	
Can you provide details on your product versioning and release schedule?	
Do you have a product roadmap for the next few years?	

Client References

Please provide references, (including company, name, title, and email)

Name of the point of contact	Company	Title	Email

Pricing

Questions	Your CMS Vendor's Answer
Can you provide insights into your pricing model and the key drivers for the subscription fee?	
What items are truly unlimited in your pricing model and where do you charge subscription fees?	
Does every product capability come included or do you charge extra for certain modules?	
What product maintenance & support is included in your subscription and which items are optional?	
Do you throttle traffic or have API-rate limits in your offering	
Can you provide a ball-park figure for the implementation of your CMS?	

Architecture and Technology

Questions	Your CMS Vendor's Answer
Is your CMS headless, or hybrid?	
Which programming language is your CMS written in?	
Is your CMS an API-first solution and can you provide an overview of the APIs and the API tooling?	
Can you provide the system requirements for your solution for CMS end-users?	
Can you elaborate on the required technology stack to run your product (only applicable for on-premise deployment)	
Does your CMS support an enterprise-grade SDLC chain?	
Does your CMS support different web application development environments or architectures like Java, .NET, LAMP, or Jamstack?	
Is the CMS 100% browser-based?	
Is your CMS cloud-based or on premise?	
Does your CMS offer a Command Line Interface (CLI)	

Can you elaborate on your support model? What is included and what is optional / extra?	
How does your CMS fit into a CI/CD pipeline set-up?	

Content Creation and Editing

Questions	Your CMS Vendor's Answer
What NoCode (developer-independent) capabilities does your product offer for editors	
Does your CMS provide inline editing capabilities, also when running as a pure headless CMS?	
Which WYSIWYG editor does your product ship with?	
Can elaborate on the preview capabilities of your product, and do you offer preview for device type, persona, scheduled content and language at a minimum?	
Can content be exposed via APIs in JSON and XML format?	
Does the CMS give users the ability to create and maintain shared assets that they can use throughout one or multiple websites?	
Does your product offer search capabilities for editors?	

Does your CMS provide a full revision history of changes and allow you to roll back changes?	
Does your CMS support the editing of metadata by content contributors?	

Personalization & Content Targeting

Questions	Your CMS Vendor's Answer
Does your CMS offer a native personalization & content targeting engine?	
Does your CMS support the use of external data for personalization?	
Can marketers set rules for personas via the CMS backend?	
What traits / characteristics does your personalization offer out-of-the-box?	
Is the personalization engine extensible with regards to traits?	
Do you offer tools for geo-targeting?	
Does your product support personalization via APIs?	

Digital Asset Management

Questions	Your CMS Vendor's Answer
Does your CMS support the storage of rich media files (images, videos)?	
How much storage capacity is included in your offering?	
What image editing capabilities do you support natively?	
Can editors set focal points for images?	
Can PDF files be associated with a workflow in your CMS?	
Can assets and their associated metadata be exported from your CMS?	
Can external assets be uploaded in batch? Via drag & drop or any other method?	

SEO

Questions	Your CMS Vendor's Answer
Can non-technical users add relevant SEO elements to each piece of content?	
Does the CMS tell you which pages are lacking critical SEO elements?	
Can you create vanity URLs for your content?	
Does your CMS give you the tools to make changes to the content without affecting the URL?	
Can editors manage redirects in the CMS UI?	

Approvals and Workflows

Questions	Your CMS Vendor's Answer
How are approval and publishing workflows configured?	
Can you create and customize workflows in an easy-to-use, visual interface?	
Do your workflows include the ability to determine which users and roles have access to perform certain actions?	

Does the CMS support multiple workflows in multiple sites or sections of the website or app?	
How granular are your CMS' workflows?	
Does your CMS automate notifications to users and roles?	
Does your CMS validate content and metadata, such as required fields or fields that only accept specific types of content?	
Does your CMS provide a content preview function so users can see the page's content before it gets approved?	
Can you publish different websites to different servers or databases?	
Can content be scheduled for publishing?	
How does your CMS promote content and configuration from downstream environments to production?	

Implementation

Questions	Your CMS Vendor's Answer
Does your CMS provide users with pre-built starter kits to speed up implementation?	
Which processes do you follow to define both the site navigation and the information architecture?	
Can a non-technical user rearrange sections in a site?	
Does making changes to the site functionality require coding?	
Could you describe the upgrade process for the CMS?	
Are clients forced to update to your new version each time something changes?	
Do you offer implementation services in-house or do you outsource it to a partner?	
How much time does it take to implement the CMS and how long does it take to create a fully functioning website?	

Templating and Design

Questions	Your CMS Vendor's Answer
Does your CMS provide (NoCode) page building and layouting capabilities?	
Does your platform enable marketers to build websites and digital experiences using drag and drop page elements?	
How easy is it for non-technical users to apply design changes?	
Can you design and edit each element of your website using your CMS or do you need third-party tools?	

Integration

Questions	Your CMS Vendor's Answer
Does the CMS have the option of providing content-as-a-service (CaaS) via APIs to any front-end, including web, apps, signage, and conversational devices?	
Does your CMS have the option of providing a hybrid content delivery architecture?	
Does the CMS integrate with web analytics platforms? Which ones does it support?	
Does your CMS integrate with third-party frontend applications?	
Does your CMS integrate with digital signage, IoT devices, or AI-powered devices to facilitate a more connected customer journey?	
Does your system support microservices architecture? If so please describe how.	
Do you offer an app-store for third-party integrations?	

Roles and Users

Questions	Your CMS Vendor's Answer
How does your CMS manage roles, users, and authentication?	
Does your CMS limit the number of users that you can add as contributors or administrators?	
Can you create a custom workflow environment with custom roles and associate only certain users to each role?	
Can a user have multiple roles?	

Security

Questions	Your CMS Vendor's Answer
Does your CMS support federated identity management and single sign-on?	
Does your CMS support SAML 2.0?	
What are your methods to restrict unauthorized access?	
Do you have procedures in place for high availability moments?	
Does your company have a procedure for data backup and recovery?	
Can we export our data out of your platform? What is the process?	
Does the CMS platform support data transfer?	
Does your CMS offer options to add third-party connectors or integrations?	
What are your web API standards?	
What method of authentication do you use for your API?	

Questions	Your CMS Vendor's Answer
What does scaling mean for you and how do you handle usage thresholds?	
From a technical perspective, how does your CMS support content localization?	
How does your CMS prevent and mitigate the effects of data loss?	
Can you provide a current attestation of privacy and trust principles such as SOC 2, GDPR, or ISO?	

Customer Support

Questions	Your CMS Vendor's Answer
Make a list of all the training videos or documentation articles you have about your CMS	
Describe your technical support model, its procedures, communication methods, schedules, Slack channels, and forums.	