



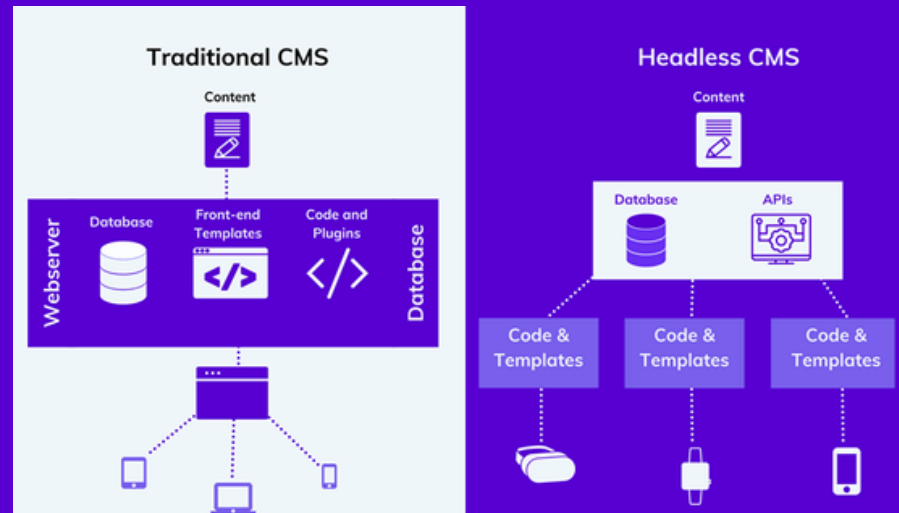
# The Ultimate Checklist for Choosing a Headless CMS

# What is Headless CMS?

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In its simplest form, a headless CMS is a content repository that can deliver content to any front-end or device via APIs.

If you want to display your content on a web page, a native mobile app, or in digital format, a headless CMS doesn't restrict you as a traditional CMS might.



A headless CMS is decoupled from the presentation layer, or front-end, referred to as the "head." The backend is the content management system, known as the "body." When you separate your "body" from its presentation layer, "head," it becomes a headless CMS.

In a broader sense, a headless CMS facilitates an omnichannel experience for improved content delivery:

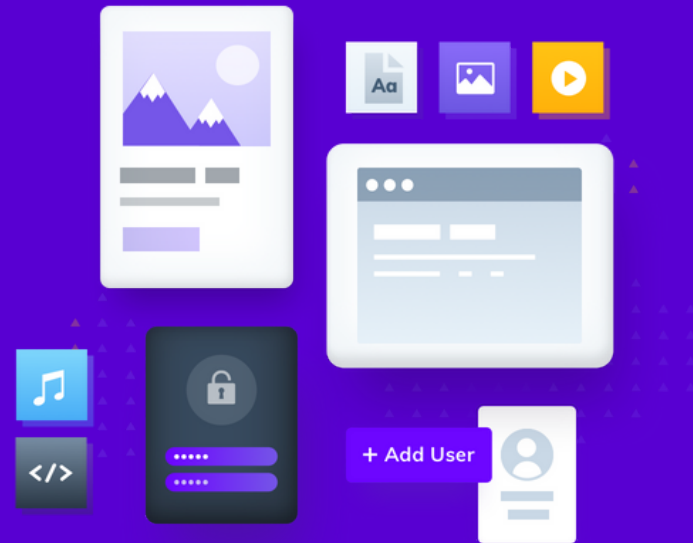
- An omnichannel experience provides customers an integrated and aligned approach to marketing, customer service, and sales.
- Customers who interact with a brand through one digital medium, such as via a mobile device, want the same experience on other devices.
- Headless CMSs provide the backend necessary for omnichannel content management.

# The Path to Headless CMS

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Choosing a headless CMS is not something that should be done on a whim.

With the sheer number of options in the market, it's crucial that you evaluate the pros and cons of every content management system, while also keeping in mind that there's no one size fits all when it comes to choosing the best headless CMS for your company.



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## Going Headless

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Using our 50-point checklist, you'll catch issues and avoid pitfalls.

We're here to help you pick the right system for your company! One that's easy to scale and that adjusts to your needs.

# Narrowing Down CMS Requirements

Use this guide as a starting point in narrowing down the CMS requirements for your team.

Before you research vendors, make sure your team is aligned on the following 50 questions. We suggest using this guide in your next team meeting!

## Your First Considerations

### 1. What is the purpose of your website or app?

- Think of the purpose of your digital system, is it intended as a long-term business website/app, or are you building it for a short-term project?

#### Short-Term:

- In short-term projects, speed of development is often a priority. Choose a headless CMS that allows for quick setup and deployment, minimizing development time.
- If the project has a limited lifespan, cost-effectiveness becomes more critical. Consider open-source or low-cost headless CMS options that meet your immediate needs without incurring unnecessary expenses.
- For short-term projects, you may not want to spend extensive time training team members. Select for a headless CMS with an intuitive user interface and minimal learning curve.

#### Long-Term:

- If you're building a website or app for a long-term business, scalability becomes crucial; look for a CMS that can handle a growing amount of content, users, and features.
- Long-term projects often require flexibility in content structure and presentation. A headless CMS that allows you to easily customize content models, adapt to changing business needs, and integrate with various technologies is essential.
- For a business, content governance is important. Look for a headless CMS that supports content versioning, workflow management, and role-based access control to ensure a smooth and controlled content creation and publishing process.

## 2. What are your performance/ integration needs?

- Some headless CMS platforms excel in scalability, low response times, and robust caching mechanisms, making them suitable for projects with dynamic content and heavy traffic. Others prioritize flexibility in APIs and seamless integration capabilities, catering to diverse third-party services and fostering real-time updates through webhooks or event-driven architectures.
- Recognizing the distinctions among headless CMS offerings allows for a tailored choice based on your project's specific requirements and objectives.

## 3. Why do you need a Headless CMS?

- By pinpointing your specific pain points, you can prioritize features that directly address your challenges and make a more informed decision when selecting a headless CMS that aligns with your content management needs.

## 4. What are your internal resource capabilities?

- If you have in-house developers, keeping them in the decision-making process will be a way to ensure that whatever headless CMS platform you choose uses programming languages that your developers are familiar with.

Here's how internal resource capabilities influence the decision:

1. **Technical Expertise:** Different headless CMS platforms may require different skill sets for implementation and customization.
2. **Resource Availability:** Some headless CMS solutions are designed for rapid development, while others may require more time for customization.
3. **Training and Learning Curve:** If your team includes members with varying levels of technical expertise, opt for a headless CMS with an intuitive and user-friendly interface. This minimizes the learning curve and allows team members to quickly adapt to the new system.
4. **Ongoing Maintenance:** Evaluate the ease of maintenance for the selected headless CMS. Consider how updates, security patches, and new features are handled. Choose a CMS that aligns with your team's capacity to manage ongoing maintenance tasks.
5. **Budget Considerations:** Some headless CMS solutions may come with licensing costs or pricing models based on usage. Evaluate your budget and choose a CMS that not only meets your technical requirements but is also cost-effective considering your team's capabilities.

## 5. What impact will this platform have on your business?

- By closely tying the evaluation of a headless CMS to your business goals and addressing the limitations of your current system, you can make a strategic decision that not only meets your technical requirements but also contributes directly to the success of your business.

## 6. Are there any internal policies that you need to adhere to?

- Does your business have particular requirements that you need to communicate to your next CMS?
- Review your policies before committing to a new headless CMS

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# Budget Considerations

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## 1. What's your budget?

- Understanding your budget is critical when choosing a headless CMS, especially given the varying costs across different platforms. For small projects, the availability of free tiers or open-source options can be advantageous, providing a cost-effective solution with essential features. However, it's equally important to consider the flip side, particularly with proprietary CMS solutions that may offer more advanced functionalities but come with associated licensing or subscription fees.

## 2. What will the cost implications be if you need to scale over time?

- Some CMS solutions may offer scalable pricing models, allowing you to increase resources or features as needed. On the flip side, proprietary or feature-rich options may have tiered pricing structures that can escalate as your requirements grow

## 3. What are the overall projected fees for implementing the new CMS?

- There are many costs to consider: implementation costs, initial CMS costs, ongoing license costs and maintenance costs.

# Speed and Scalability

## 1. How easy is the CMS to deploy?

- Some headless CMS platforms are designed for rapid deployment, with user-friendly interfaces and straightforward setup processes. These solutions often cater to projects with tight timelines or those requiring quick iterations. On the other hand, more complex CMS options may involve intricate deployment procedures, potentially requiring specialized skills and additional time. Understanding the deployment ease is essential for aligning the CMS with your project's timeline, resource availability, and the level of technical expertise within your team.

## 2. How soon do you need your website/app?

- Certain CMS platforms are designed for rapid deployment, allowing you to launch your digital project quickly. These solutions are ideal for time-sensitive initiatives or projects with urgent deadlines. On the other hand, more robust and feature-rich CMS options may require a longer implementation period to ensure proper customization and integration. By evaluating your timeline, you can align it with the deployment speed of the chosen headless CMS. This ensures that your website or app is ready within the required timeframe, meeting your project's deadlines and aligning with your overall business objectives.

## 3. Can you start small and scale later?

- Assessing the scalability options among different headless CMS vendors is critical. Some CMS providers offer flexible scalability features, allowing you to start with a smaller configuration and effortlessly expand resources as your project grows. This adaptability is beneficial for projects with evolving needs, enabling a seamless transition from a modest setup to a larger, more robust infrastructure. On the other hand, some vendors may have more rigid scalability models, requiring a deeper commitment or complex transitions to accommodate increased demands.

# Infrastructure

## 1. How is the data accessed?

- Different CMS platforms may have varying approaches to data retrieval, especially in a headless architecture. Some CMS solutions provide robust and flexible APIs (Application Programming Interfaces), enabling seamless access to content for various applications and devices. Others may have limitations in terms of API capabilities, potentially impacting the efficiency and versatility of data access

## 2. Is the platform multi-tenant?

- A multi-tenant architecture allows the company to update the CMS for all customers simultaneously, increasing the frequency at which you get updates and bug fixes.

## 3. Can the CMS support load balancing or dynamic scaling?

- A load balancer routes client requests across multiple servers, maximizing speed and capacity utilization to prevent overload.
- Having a CMS that balances its loads is always a good idea if you want to be always at peak performance.

## 4. Does your CMS have its own internal site search?

- Internal site search enables users to search for terms on your site, improving user experience and SEO



# Security and Permissions

## 1. Does the CMS fully support SSL certificates?

- By selecting a CMS that fully supports SSL certificates, you can prioritize the protection of user data, build trust with your audience, and meet security requirements essential for the success and credibility of your digital presence.

## 2. How granular are the permissions and roles?

- Not all your employees have the same permissions, and your CMS must reflect that.
- The more granular your permissions are the better your data protection and security.

## 3. Does it have formal security accreditation?

- Other than an SSL certificate, there are other security accreditations that your CMS needs to have.

## 4. Does it support single sign-on?

- Single sign-on lets users securely authenticate with multiple applications and websites by logging in only once.
- It also enables you to log in quickly and safely from a trusted device while a third-party verifies who you are.

# Content Management

## 1. Is the content authoring interface marketer friendly and easy to use?

- The user-friendliness of the content authoring interface is a crucial factor when selecting a headless CMS, especially in consideration of the needs of marketers. A CMS with a marketer-friendly and intuitive content authoring interface streamlines the content creation process, allowing marketers to efficiently manage and update content without requiring extensive technical knowledge.

## 2. Is the CMS SEO friendly?

- A CMS with customizable metadata, clean URL structures, mobile responsiveness, fast page load speeds, structured data support, XML sitemaps, canonicalization control, and options for robots.txt and noindex tags enhances on-page optimization and improves search engine rankings.

## 3. Is it easy to preview content?

- Look for a CMS that provides a user-friendly preview interface, enabling quick and accurate assessments of layout, formatting, and overall presentation across various devices. A seamless content preview process enhances the content creation workflow, ensuring that authors can make informed decisions and adjustments, leading to a more polished and user-friendly final product.

#### 4. Do you have expertise or someone will support you with your new Content Architecture?

- Having expertise or support for your new content architecture is crucial when adopting a headless CMS. If you have in-house expertise, ensure that your team is well-versed in the chosen CMS and the principles of headless architecture. If not, consider whether you have access to external support, such as development agencies or consultants, who can guide you in implementing and optimizing your content architecture.
- Content architecture in a headless CMS often involves structuring and organizing content models, defining relationships, and configuring APIs. Having knowledgeable support ensures a smoother implementation process, reduces the learning curve for your team, and helps in making strategic decisions that align with your business goals. Whether through internal expertise or external support, having a solid understanding of your content architecture is essential for maximizing the benefits of a headless CMS.

#### 5. Does the CMS enable non-technical users to create complex content?

- When it comes to embedding videos, inserting tables, cropping images, and adding page widgets, will your new CMS help or hinder your marketing and content teams?

#### 6. Does the CMS help you localize content?

- Determine whether the CMS can help you translate your content at scale, so it looks appealing to every possible audience in their mother tongue?

# APIs and Extensibility

## 1. Does the vendor provide certified partners you can choose from?

- Sometimes, CMS companies have a list of trusted partners and vendors that work directly with them, guaranteeing better performance and seamless integration.
- Check the vendor's partners and see if their offer is also in-sync with your company's goals.

## 2. Does it come with tools or methods for migrating large amounts of content?

- Migration, no matter what kind of, is always a challenge. Website migration is not an exception.
- Assess if your CMS can help you migrate your content or you need a third-party software.

## 3. Does it provide insights into how customers interact with the content?

- Analytics provides the content marketing and business teams with insights to optimize organic traffic and page and content performance.
- When choosing your headless CMS, pick one with native integrations with Google Analytics or any other embeddable analytics framework.

#### 4. Does it have a mature API, SDK, and/or webhooks allowing it to be easily integrated or extended?

- A headless CMS with a mature API, SDK, and webhooks offers flexibility, allowing developers to extend functionality, integrate with external systems, and customize the user experience. It ensures that your digital ecosystem can evolve with changing requirements and technological advancements. Prioritizing a CMS with strong developer support enhances the extensibility and integration capabilities of your content management system, contributing to a more dynamic and adaptable digital infrastructure.

#### 5. Does it come with a dashboard for monitoring website health?

- With a monitoring dashboard, you can track the health of your website, identify areas for improvement, and respond promptly to any issues. Key features to look for include traffic trends, page load times, error reporting, and user behavior analytics. This information empowers you to make data-driven decisions, optimize content, and ensure a positive user experience.

# Support

## 1. Does the vendor offer 24/7 live support?

- Constant support is necessary if you're starting with a new CMS. Also, if you're in a different time zone than your vendor, having 24/7 support can make the big difference.

## 2. Does the vendor offer onboarding support from start to finish?

- CMS with comprehensive onboarding and white-glove service can help you leverage their features better and faster, resulting in a quicker ROI.

## 3. Are there technical and non-technical training sessions available?

- Training sessions are different from onboarding and offer in-depth help on certain topics your marketing and development teams need to fully use the CMS.

# The Top Headless CMS Comparisons & Overview

