

The CMS Requirements Template

Do this before you book a single demo. If you get your requirements right, choosing between the final two or three is easy. If you get them wrong, no amount of demo-watching saves you.

Part 1. The four questions

Who actually uses this, and how often?

Not who signs the contract. Who logs in on a Tuesday to change a headline.

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What content do you actually have?

Pages, templates, media, languages, regional variants. And is it structured?

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Where does the content need to go?

Channels you run today, not channels from a strategy deck.

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Who maintains it after launch?

Upgrades, plugins, integrations, permissions.

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Part 2. Your scenarios

Write three tasks a real person must complete. Send these to vendors in advance and make them demo these, not their standard script.

Scenario 1

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Scenario 2

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Scenario 3

Part 3. Must-have vs want

Get to five or six genuine dealbreakers. If everything is a must-have, nothing is.

Must-have (max 6)	Want (tiebreaker)

Part 4. Integration inventory

System	Supported connector / API / nothing

Part 5. Total cost, not licence cost

Line	Year 1	Years 2-3
Licence		
Implementation		
Content migration		
Training		
Hosting (if not SaaS)		
Ongoing development		
Internal team time		

How to use this: Have your marketing lead and technical lead fill this in separately, then compare. Where they disagree is the risk in your project, and it is far cheaper to find that now than after signing.

