



How to select a headless CMS



BUYER'S GUIDE &
RFP TEMPLATE

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Introduction



Headless content management is an exciting venture past the traditional CMS, providing flexibility and scalability to agile companies. Making the switch to headless CMS gives companies the power to make their technology work for them, future-proof their digital investments, and connect with their customers more fluidly across mobile, desktop, voice and other devices. The right headless CMS can also save money, time and effort for marketing and development teams.

But choosing a headless CMS can be an overwhelming process, with many vendors and moving pieces to consider.

If you're looking to evaluate a headless CMS for your company, this guide and RFP template will set you up for success.

Key takeaways from this guide:

- Understand your resources and how to properly leverage a platform to alleviate workload
 - Gain a better understanding of what a headless CMS is and what key areas to evaluate
 - Know what questions to ask when evaluating vendors and how to align those answers with your business priorities
 - Use these questions to develop your own RFP to evaluate the various headless CMSs on the market
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Before you begin: know your team

Before beginning your headless CMS evaluation process, you really need to know your team: what it looks like today and what you want it to look like in the future. This includes how many people, what their roles are, and the budgets you have associated with both areas.

By choosing the right headless CMS, you have an opportunity to either lower your technical headcount or reassign your technical employees to revenue-generating projects. If you select a maintenance-heavy headless CMS, you may need to increase your headcount to address support tickets, maintain infrastructure, and ensure everything is running smoothly at all times.

Start by using the table on the next page to map your existing team. This will give you insight into what type of CMS your team is ready for today.



Role	Number on Current Team	Number to Hire
<p>CONTENT AUTHOR Writing and producing content. They work within the CMS' editing tools, specifically on content creation management and workflows. They need autonomy to publish, edit.</p>		
<p>MARKETING LEAD Oversee, resource, and provide strategies for the marketing team. They read reports and analytics but do not typically engage with the CMS.</p>		
<p>MARKETER Create and manage strategies, campaigns, optimize web structures and content for better SEO.</p>		
<p>SEO LEAD Entails all processes in improving the search engine ranking of your pages</p>		
<p>TECHNICAL LEAD Manages the processes, structures, and designs necessary to deliver technical projects.</p>		
<p>DEVELOPER OPERATIONS (DEVOPS) ENGINEER Builds, tests, and manages infrastructure and tools to enhance visibility and align processes across the CI/CD pipeline.</p>		
<p>WEBSITE DEVELOPER Responsible for designing, coding, building, and managing the layout of a website.</p>		
<p>WEBSITE DESIGNERS The role entails planning, creating, and designing the appearance of web pages including content, videos, sounds, graphics, branding.</p>		
<p>INTEGRATIONS ENGINEER Responsible for planning, designing, and implementing any integration with your infrastructure and creating documentation for future use.</p>		



consider this

A larger team drives some efficiencies but also can also create difficulties in getting content out the door. Be sure to clearly understand your workflows and how a new vendor might improve or challenge your time-to-market.



Defining a headless CMS

Now that you better understand the technical needs of your team, let's define what a headless CMS actually is.

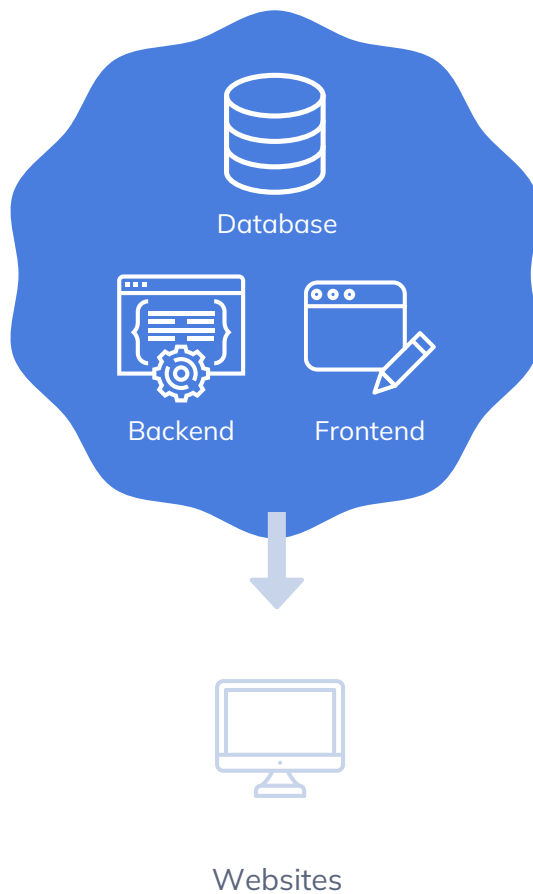
In technical terms, a headless CMS decouples the frontend presentation layer of code from the backend code. In practice, this provides the teams responsible for digital content the ability to house all their content in one place and deploy it across limitless digital channels. The key here is that headless CMS allows you to place your content anywhere without having to reconfigure the content every time, since the content is separate from the design. Using a traditional CMS for many digital channels would require separate development for each device.

However, the inundation of headless CMS is sometimes considered an overcorrection for the rigid traditional CMS. Developers love the flexibility of a headless CMS, but many leave marketers in the dark, since they can't easily make updates and deploy content in the way they would be able to with a traditional CMS. This is important to evaluate in your RFP - does the headless CMS you're considering offer visual, SEO, and publishing tools to empower your marketers or does it make their jobs harder?

This comprehensive set of RFP questions can help guide your understanding of whether a headless CMS is right for your business and how to properly evaluate CMS offerings on the market.

Headless vs traditional CMS

Traditional CMS

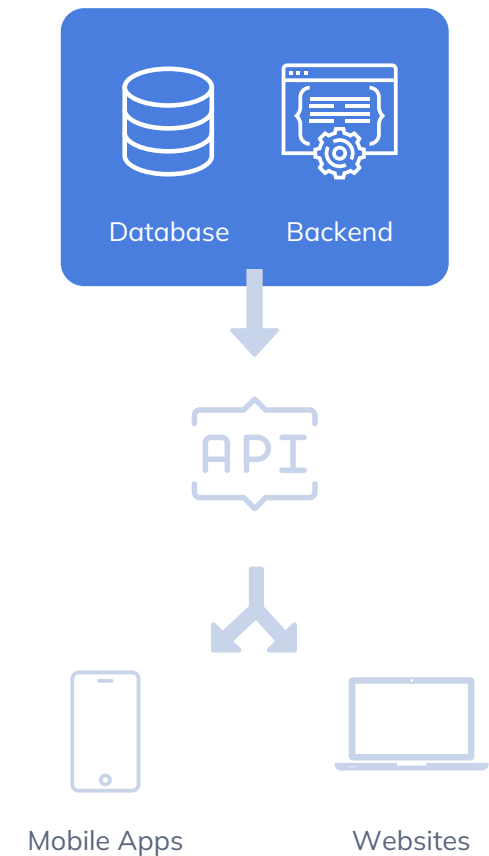


In a traditional CMS, the backend, frontend, and content are all combined in one. For a less technical user, this is a great option because you don't need backend development and can create/publish easily.

A headless CMS is only the backend. It is used as a content repository so there is no frontend template or design, just data.

This data is accessed through APIs and served as websites, apps, etc.

Headless CMS



6 questions before creating an RFP

01 What goal are you trying to achieve?

Prior to writing your RFP, you need to understand what you want, what you need, what challenges you face, and the timeline or roadmap for the project. Your end goal should be top of mind at all times.

02 What is your current and ideal team setup?

Do you have a DevOps person/team? Do you have an agency partner? Do you have a marketing and content team? If not, are you willing to invest, or would you prefer to keep your team lean? These answers will impact what you need from a headless CMS.

03 What requirements must be met?

Having specific requirements ready before you send out RFPs will make the process easier. That way, you won't have to wade through numerous vendor proposals. Focus on solutions that include the functionality and features you need and those you would like to have.

04 Do you have a time limit?

If you want to move forward quickly but orderly, setting up an RFP timeline that indicates when you must make a decision can be helpful. In practice, it helps to inform a vendor of a timeline for implementing your headless CMS within three to six months at the start of the process.

05 Is it possible to have a proof-of-concept?

You want to ensure that you request more than a demo. If you want to truly know if a particular CMS is right for your business, you need to test it out. You can gain better insight by accessing a sandbox and building up your most critical use cases.

06 Does the vendor's roadmap align with yours?

Every vendor will have a specific roadmap they follow. Perhaps a headless CMS has several of the features you need today but does not plan to provide you with a specific feature down the road. Make sure to plan for the future of your business as you choose your vendor.

Sample headless CMS request for proposal

The following pages will provide key questions to ask when drafting your RFP.

Questions

These are the questions that we suggest you ask every CMS vendor during your selection phase. They typically relate to a feature, function, or service.

Observations

We'll dive deeper into definitions where necessary and discuss why this feature, function, or service is beneficial to your company.

Potential product (notes or Y/N selection)

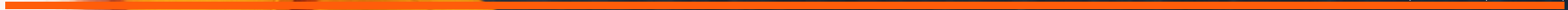
This column will be left blank, allowing either your potential vendor or your internal team to note down how the product matches up to your selection standards.

Want to use these questions in your next RFP? Access the Google sheets file >





Vetting the vendor: key questions to ask



Architecture

First, you should determine the type of architecture you want to build your digital ecosystem with. For example, you could select one vendor that's best-of-breed, MACH, and Jamstack-ready.

Crucial questions to ask about the CMS vendor's architecture are listed on the right.

Does it meet the content needs of a traditional CMS?

Y / N

A traditional CMS connects the presentation (frontend) and logic (backend) layer of a website for easy and faster deployment. You can serve your entire website from a single CMS by making use of themes and templates available, or customize the design using an editable HTML view.

Does it offer a headless CMS API interface?

Y / N

A headless CMS separates the frontend of a website from its backend. That way, you can use content APIs to pull content to any digital channel (website, mobile, IoT, VR/AR, e.t.c) with little worry about its frontend framework (frontend agnostic).

Does it align with MACH architecture?

Y / N

The MACH architecture (Microservice-based, API-first, Cloud-native, and Headless) is a modern development approach to building a modular, composable, and highly scalable tech stack. By using a technology that follows MACH, you can integrate more best-of-breed services into your stack, ensuring greater agility and innovation.

Is it cloud-based, on-prem, or hybrid?

C / P / H

A CMS can be cloud-based, on-prem, or hybrid. This will play a huge role in providing better scalability and security, as well as internal security measures.

If cloud-based, what cloud platform is it built on?

By knowing the cloud-platform that the CMS is built on (GCP, Azure, AWS, etc.), you can better understand the technologies you can use with the CMS.

What frontend framework does it support?

You want to know if the CMS supports a particular frontend framework of choice, be it Angular, React, Next, Vue, etc.

What kind of datastore does it use?

This may be important depending on your engineering team's involvement and requirements. Please connect with them directly to ensure that if there is a requirement here, you can ensure your vendor is compliant with their preferences.

What scalability options are available (auto-scale or manual-scale)?

With the burden already on developers, you may not want to add a CMS that requires manual scaling or maintenance. You want a CMS that can automatically handle mass demand and consumption while ensuring developers concentrate on creating great experiences.

Hosting & Deployment

Can you upgrade the CMS without shutting down the service or going into maintenance mode?

Y / N

You want to know if you'll be experiencing downtime during periods of upgrades or site maintenance.

Does the platform offer PaaS, SaaS or hosting options?

Y / N

Find out if the vendor offers on-prem, cloud-native, or hybrid hosting options. Your organization may have requirements, so please check with your engineering or infosec team to confirm.

Is there any guarantee for API uptime (according to SLAs)?

Y / N

You want to know how much uptime the vendor offers with its SLAs, as well as any limits you anticipate you may hit. If there's a massive traffic spike, will your vendor's APIs be performant?



General questions for the vendor

Questions	Observations	Notes
Is your product a suite/all-in-one solution?	A suite/all-in-one CMS combines everything that you need into one monolithic stack of software. While sometimes helpful, it can limit innovation, flexibility, and scalability.	
What is the primary value proposition of your product?	You want to know what makes the product stand out among other options on the market. Also, you want to ensure their values, vision, and expertise align with yours.	
What are the most pressing enterprise challenges you address?	Learn how the CMS solves some of the most crucial challenges for enterprises. Examples of these can include multi-language support, multi-site, site templates, previews, etc.	
Who are your three top competitors, and what are your key competitive advantages?	You want to know the CMS options that they consider as prime competitors and how they believe they stack up against them.	
How often do you release new versions of your products?	This can give you a glimpse of how often you'll get security updates, feature updates, and new version releases of the software. It can also serve as the timeframe before needing changes to your CMS if there's a breaking upgrade.	
Do you have a clear product roadmap for the next three to five years?	A CMS is a long-term investment. A roadmap gives you a glimpse of the features the vendor will incorporate in the future and what their priorities are.	

Content authoring and editing

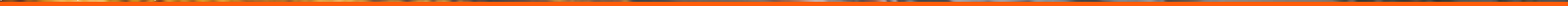
Questions	Observations	Notes
Does your product offer content versioning and content revision history?	You want to ensure that you can track, audit, and revert changes made to any content.	Y / N
Does your product offer any editor-specific no-code capabilities?	You want to know that the CMS can fully support your marketers by directly creating sites using templates without having to depend on developers all the time.	Y / N
Do you offer content preview capabilities for device types, channels, personas, and language?	With content previews, you can visualize how your content will appear across different devices and channels.	
Does your product include a WYSIWYG editor?	You want to ensure that you can leverage a WYSIWYG editor to create and edit pages.	Y / N
Does the CMS allow users to create, manage, and share digital assets?	You want to know if the CMS natively provides options for creating and managing digital assets (media) or can integrate easily with a DAM.	Y / N

Content authoring and editing

Questions	Observations	Notes
What is the process of authoring content?	A content authoring workflow enables clear content management processes and an enhanced editor experience.	
Are there ways for users to browse reusable content in the content repository?	You can easily reuse content and modules with a modern CMS. Look elsewhere if the vendor does not have them.	Y / N
Can structured content be edited within the CMS?	During both content creation and content migration, structured content editing saves time. You'll need a CMS that can support it.	Y / N
Does your CMS have audit trails and roll-back capabilities?	It is inevitable to make mistakes. Without audit trails and roll-back support, you can't undo the mistakes. Be sure to consider a vendor that provides this.	Y / N
Does the CMS allow content authors to edit metadata?	For enterprises with numerous assets, metadata and structured data are essential. Be sure your vendor allows you to edit metadata.	Y / N



User-specific questions



Developer-focused questions

Is WYSIWYG/drag and drop editing available?

Y / N

A WYSIWYG editor ensures a faster time-to-market. You want to ensure that your developers can rely on this feature to quickly set up and create web pages to let their marketing team run with content.

Does the CMS provide support for inline or CLI editing?

Y / N

With a CLI, you can empower developers to interact with the CMS directly within Node.

What language(s) is the CMS compatible with? Will the product require expertise in a specific programming language?

You want a CMS that aligns with the skillset present in your enterprise. Furthermore, you should choose a CMS that is front-end agnostic, so that you can use whatever language you like.

Does the product offer auto-scaling or manual scaling capabilities?

Y / N

Choosing a CMS that has auto-scaling capabilities will relieve your developers of unnecessary work, allowing them to focus on more pressing issues.

Does the CMS offer support for different environments (development, production, and staging)?

Y / N

With these options, you can modify, test, preview, and publish seamlessly with little downtime.

What is the process for releasing software upgrades/patches?

With this, you can know when to expect security updates, feature updates, and version upgrades.





Marketing-focused questions

Is multi-language support available?

Y / N

If you intend to deliver content across several regions with different languages, then you want to ensure that your DXP comes built-in with multi-language support.

Does the CMS offer multi-site management support?

Y / N

You need a DXP that offers multi-site management if you intend to manage multiple sites and campaigns within a central administrative interface.

In what ways does the CMS help to create, organize, publish rich media assets such as images and videos?

A content-rich enterprise will need an asset management feature to create and share media files (images and videos). You want to make sure your DXP handles assets correctly.

Can existing pages on the website be easily updated with a new design?

Y / N

You should find out how easy and seamless it is to modify the templates and sites with a new design.

How does the CMS perform SEO? Please explain.

SEO is crucial to any modern enterprise. You need a CMS that fully incorporates features that enhance SEO.

Marketing-focused questions (cont'd)

Questions	Observations	Notes
Does the CMS offer a feature to create and track SEO-friendly URLs?	You need actual words in the URL slugs of your web pages to make your URLs SEO-friendly. With a CMS that delivers SEO-friendly URLs, you'll increase your rankings and attract more visitors.	Y / N
Is there an out-of-the-box integration with an analytics platform?	Even with a CMS, you need to track, optimize, and enhance the performance of your content. That is only possible when you have an analytics integration.	Y / N
What kind of support does the CMS provide for social media?	You may want a CMS with rich features for displaying external social media content and providing access to RSS feeds and comments.	
What options are available for form and newsletter creation?	For marketers that want to deliver weekly, bi-weekly, or monthly newsletters, you can opt for a CMS that supports or integrates with an email marketing platform.	
Does your CMS provide analytics reports and alerts on SEO page performance?	You need to keep your pages live and well-optimized. That means monitoring and receiving alerts if a page is unavailable or needs to be optimized.	Y / N
Is it possible to make content changes without impacting the page URL?	This is the importance of content versioning. With it, you can make changes to content without affecting the URL.	Y / N



Business impact questions



Business questions

Questions	Observations	Notes
What options are available for re-platforming/migrations?	Some CMSs have complicated processes to re-platform or migrate content. Before choosing a CMS, be sure to find out the options available for migrating content and the costs associated.	
Will there be any other hidden expenses?	Headless CMS expenses vary from vendor to vendor. Some may charge extra for support, maintenance, upgrades, or extensions.	
What is the estimated cost and timeframe for implementation?	Some CMS vendors may fail to provide the cost of implementation during the selection process. You want to ensure that the timeline and cost suit you.	
What makes this CMS the ideal option for enterprises?	Find out how the CMS differs from other options on the market. Whatever decision you make, be sure to select one with features that match your utmost needs.	
Is your CMS agile enough to meet future demands?	Tell your vendor what you want to achieve within a certain date and the metrics you plan to focus on to ensure that the platform will support you in achieving your goals.	

CMS integrations

Questions	Observations	Notes
Does the CMS offer support for the third-party tools you currently use or plan to use?	You need to ensure that the CMS integrates seamlessly with your current tech stack.	
Can the CMS push native content directly into a commerce platform that serves as your eCommerce front-end?	If you need commerce capabilities, you want to know if your CMS has provisions to readily integrate with any eCommerce engine.	
Do you offer a marketplace or app store for third-party integrations?	Several headless CMS vendors have a marketplace that contains third-party plugins, templates, themes, and more. These add-ons or extensions can better customize and enhance the digital experience.	
Do you have native integration with analytics, AI, CRM, or personalization platforms?	You likely need a headless CMS that offers integrations with essential best-of-breed platforms. Be sure to look for a CMS with native integration with an analytics and personalization platform. Other options may include a DAM, CRM, search, etc.	
Can the CMS integrate with IoT devices, digital signage, or AI-enabled devices and channels to enhance the customer experience?	To facilitate omnichannel delivery, you need a CMS that integrates and delivers content directly to modern, innovative channels such as AR/VR, and AI or IoT-enabled devices.	
Is it possible to pull content from other feeds or third-party services?	You should find out how possible and easy it is to pull content or data from other third-party services into your CMS.	

Support

Can you compile a list of all the training videos and documentation articles available on your CMS?

Y / N

No matter how good a CMS is, it is useless without adequate documentation, tutorials, and training videos. Be certain there are enough materials available for the headless CMS before opting for it.

Is there 24/7 support on the CMS platform?

Y / N

The success of your CMS may depend on how fast you're able to mitigate challenging incidents. A 24/7, 365-day support service will go a long way towards that goal.

What channels are available to reach your support team (Slack, Discord, forums, etc.)?

Before adopting any product, you need to ensure you have adequate support when necessary. This can help you decide on the best way to contact the vendor's support team.

What is the process and procedure for resolving support tickets?

You need to know how the vendor handles support tickets. It will give you an overview of the procedures and speed at which a support ticket is resolved.

Do you offer support for different environments (development, production, and staging)?

Y / N

With these options, you can modify, test, preview, and publish seamlessly with little downtime.

Do you provide onboarding support?

Y / N

Be sure to know how the vendor onboards new users.



Support (cont'd)

Questions	Observations	Notes
How are product updates delivered? Do we have to deploy or manage any updates on our servers?	You need to know how updates are delivered and applied. It can be applied automatically or manually. Your choice of CMS may depend on how much hands-on control you prefer.	
How does your technology roadmap look in the next few years?	Understanding what each release will offer CMS users is crucial before choosing one.	
What is the SLA for the platform and content delivery?	Be sure to be updated on the vendor's SLA for all services: API availability, platform uptime, webpage delivery, ancillary services, etc. Your engineering team may have a hard requirement here, most companies require at least 99.5% uptime guarantee. BONUS: Also ask about what happens if that uptime guarantee is missed, i.e. do you receive credit for the following month, etc.	
Is it possible to have an MVP or PoC developed during the selection process?	Nothing beats real-time practice. With an MVP or PoC, you can test out some of your processes in the CMS to see if it meets your needs.	
How does your company handle implementation support? Do you use systems integrators or do you do it yourself?	The process of implementing a new CMS can be quite daunting and sometimes lengthy. The CMS vendor may help with this integration. Otherwise, you'll need the help of a system integrator or agency to implement it.	

Agency & system integrator options

Do you have a network of implementation partners?

Y / N

The perfect partner can help bring your vision to light. You should know if there's a partner network that you can leverage for your headless CMS.

Would you be willing to work with an agency of our choosing?

Y / N

Find out if it's possible to leverage an external agency that's not one of the vendor's accredited partners.

Would you be open to working only with our in-house team?

Y / N

In the event that you don't want to bring on extra costs with an implementation partner or agency, find out if it's okay for the vendor to work with an in-house team.

Do you have an implementation partner or agency that you can recommend to us?

Any recommendation provided guarantees you a highly-rated expert partner.

Implementation & onboarding

How much skill or expertise is needed to update a site's functionality or design?

Y / N

You need a CMS that allows non-technical users to modify your website quickly and easily if you cannot afford to hire a development team.

How are upgrades released? And what is the release frequency?

Y / N

Upgrades can be complex and cumbersome, so if your vendor doesn't have a clear process for upgrading, you may want to avoid them.

If you want to maintain your competitive edge, you should go for a CMS with frequent upgrades that are not disruptive.

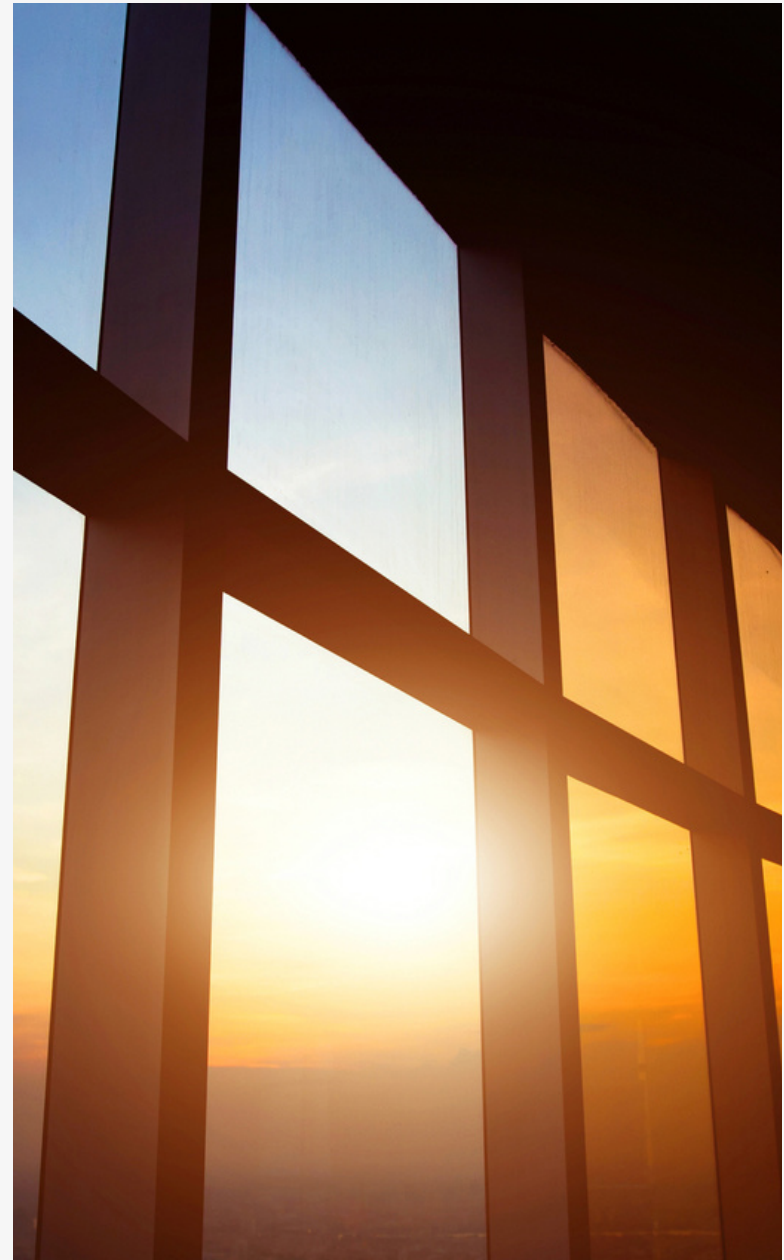
What is the process for content migration?

Often, content migration requires a lot of effort. With a modern CMS platform, migration should be made seamless and easy. It is essential that the vendor has migration plans tailored for different platforms.

What is the process for creating, defining, and editing website templates, including the skills, coding languages, and tools required?

Y / N

Sometimes, a headless CMS requires additional skills that may not be common or may be expensive to hire for, such as backend development. Find out if you'll need to hire someone or acquire new skills to manage any of the processes.



Security & compliance

Questions	Observations	Notes
Do you provide any federated identity management or single sign-on process?	Federation identities make it possible for subscribers to authenticate their logins on a single platform with the same credentials as their enterprise counterparts.	Y / N
What SSO protocols do you support?	Available SSO protocols may vary from vendor to vendor. You want to ensure that you find one that suits your requirements.	
What policies and techniques do you follow concerning data loss prevention and mitigation, and to protect sensitive information?	When something happens, CMS vendors need to have data loss policies in place so you can recover your information and assets. A CMS without clear policies may be unable to recover your data in the event of a disaster.	
How do you prevent unauthorized access?	Preventing unauthorized access is crucial for any enterprise. Find out the sign-in options, roles, and processes in place to prevent unauthorized access.	
Have you established a procedure to handle high-availability situations?	A massive surge in traffic can lead to downtime if not properly prepared. A modern enterprise CMS should have options available to mitigate and scale the platform to meet these demands.	
Is it possible to export data from the CMS platform?	Building your CMS requires that you connect with other external solutions. You should be able to securely and seamlessly export data from the CMS. Also, be sure to find out what file formats are available for exports.	Y / N
Is there an established attestation of trust and privacy, such as SOC2, GDPR, or ISO?	An enterprise CMS platform should contain certifications that show its security and compliance standards. Steer clear if it doesn't meet your requirements.	Y / N



Pricing

What is the pricing structure for the headless CMS?

Y / N

For SaaS businesses, there are many pricing models to choose from. Choose a CMS that delivers at an affordable price that meets your needs.

Are any features likely to incur extra costs?

Y / N

Some features will come out of the box while some will be paid for. Be sure to find out which features are paid for.

Is there a fee associated with maintenance and support?

Y / N

Many SaaS vendors put extra costs on support while some offer different pricing models for it. You want to know which options are available and which are most suitable for your team.

How much does implementation cost?

Vendors usually don't mention implementation costs in their pricing. Find out an estimated fee for implementation.



Key takeaways

Find a CMS that suits your needs

Your headless CMS is the key to helping you reach and engage new customers and drive business forward. With a bit of research and prep, you can be confident in selecting the right vendor.

When preparing your RFP, be sure to:

- Have a clear understanding of your team and your business needs
- Research any unknowns, including terms or concepts you may not understand
- Know the key features and benefits you need from a headless CMS vendor

Ready to score your RFP?

- Make sure to weight important questions accordingly
- Have clear guidelines in place for each team member scoring your RFP
- Make clear to your potential vendors how and when you will be scoring the RFP

[Access the excel file to use in your next RFP >](#)

About Zesty.io

Zesty is the headless CMS solution to scale your business with. Zesty helps rapidly growing businesses grow with ease through our flexible frameworks, cloud-native platform, expansive integration options, advanced multi-language and localization capabilities, and automated SEO. With Zesty, you can spend less time and resources on development, and more time creating impactful content.

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