dotcms

RFP Template for a 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.

1. Company Information

Complete this section to give vendors the context they need to respond well.

Question	Your CMS Vendor's Answer
Company overview (what you do, who you serve, how you serve them)	
Goals you want to achieve with a new CMS	
Scope of work	
Current roadblocks and barriers to success	
KPIs and criteria for success	
Mandatory requirements a vendor must meet to be considered	
Proposal due date / project go-live date / budget range	

2. Vendor Information

Question	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 solve?	
Who are your three strongest competitors and what are your key differentiators?	
How is your product versioned and released (for example continuous/evergreen updates versus major-version releases), and how do you keep customers current, stable, and secure?	
What does your product roadmap look like for the next few years?	

3. Client References

Question	Your CMS Vendor's Answer
Provide at least three references for comparable projects (company, contact name, title, email).	

Question	Your CMS Vendor's Answer
Provide at least one reference in our industry or a comparably regulated sector.	
Provide a reference for a deployment of similar scale or architecture (e.g. multi-site, on-premise, headless).	

4. Pricing

Question	Your CMS Vendor's Answer
What is your pricing model and what are the key drivers of the subscription fee?	
What is truly unlimited in your pricing, and where do you charge fees?	
Does every capability come included, or are some modules charged separately?	
Are AI features included in the subscription, or priced separately? Are there per-use or token-based AI charges?	
What maintenance and support is included versus optional?	
Do you throttle traffic or apply API rate limits? How are overages handled?	
Can you provide a ballpark figure for implementation?	

5. Architecture and Technology

Question	Your CMS Vendor's Answer
Is your CMS headless, hybrid, or traditional?	
Which programming language is your CMS written in?	
Is your CMS API-first? Provide an overview of the APIs and API tooling (REST, GraphQL).	
What are the system requirements for CMS end users?	
What technology stack is required to run the product (for on-premise deployments)?	
Is the CMS cloud-based, on-premise, or both? Describe supported deployment models.	
For on-premise or private-cloud, can the solution run in a specific data-residency region, and can non-production environments be pinned to the same region?	
Does your CMS support an enterprise-grade SDLC, CI/CD pipelines, and a CLI?	
Does your CMS support containerized deployment (Docker, Kubernetes)?	
Does your CMS support different development frameworks (Java, .NET, LAMP, Jamstack, modern Javascript)?	

6. Content Creation and Editing

Question	Your CMS Vendor's Answer
What NoCode (developer-independent) capabilities does your product offer editors?	
Does your CMS provide inline/visual editing, including when running fully headless?	
What content editor does your product ship with (block editor, structured editor, rich text)?	
Describe your preview capabilities (device type, persona, scheduled content, and language at a minimum).	
Can content be exposed via APIs in JSON and other formats?	
Can users create and reuse shared content and assets across one or multiple sites?	
Does your product offer search for editors across content?	
Does your CMS provide full revision history and rollback?	
Can content contributors edit metadata?	

7. AI and Intelligent Content NEW

Question	Your CMS Vendor's Answer
What AI-assisted authoring capabilities do you offer (generation, summarization, rewriting, tone and translation)?	
Does your CMS offer AI-powered or semantic search for end users and for editors?	
Does your platform produce AI-ready, structured content suitable for LLM and RAG consumption?	
Can AI agents operate the CMS programmatically (for example via an MCP server or agent APIs)? Describe what actions agents can take.	
Does your CMS use AI for personalization, content recommendations, or next-best-content?	
GOVERNANCE: Do you contractually guarantee that our content and data are never used to train your AI models or any third-party or sub-processor model?	
Which AI models or providers power your AI features, and can we choose or bring our own model (including a private or self-hosted LLM)?	
Do you hold ISO 42001 (AI management system) certification or an equivalent AI-governance attestation?	
What guardrails, auditability, and human-in-the-loop controls exist around AI-generated content?	

8. Personalization and Content Targeting

Question	Your CMS Vendor's Answer
Does your CMS offer a native personalization and content-targeting engine?	
Does it support the use of external data (e.g. a CDP) for personalization?	
Can marketers set persona and segment rules from the CMS backend without development?	
What traits and characteristics does personalization offer out of the box, and is it extensible?	
Do you offer geo-targeting and campaign-based targeting?	
Does your product support A/B testing of content and layouts?	
Does your product support personalization via APIs for headless delivery?	

9. Digital Asset Management

Question	Your CMS Vendor's Answer
Does your CMS support storage of rich media (images, video, documents)?	
How much storage is included?	
What native image editing and rendition capabilities do you support? Can editors set focal points?	
Do you offer AI-assisted asset capabilities (auto-tagging, smart crop, automated alt text)?	
Can assets and their metadata be exported in batch?	
Can external assets be uploaded in batch via drag and drop or other methods?	
Does the DAM support asset versioning, expiry, rights management, and approval before reuse?	

10. SEO and Answer-Engine Optimization (AEO)

Question	Your CMS Vendor's Answer
Can non-technical users add SEO elements (titles, descriptions, canonical URLs) per page and language?	
Does the CMS flag pages lacking critical SEO elements?	
Can editors create vanity URLs and manage redirects in the UI?	
Can the URL stay stable when content changes?	
Does the CMS generate structured data and schema (including breadcrumb schema) and an automatic XML sitemap?	

Question	Your CMS Vendor's Answer
AEO: What capabilities support visibility in AI answer engines and generative search (structured, machine-readable content for LLMs)?	

11. Analytics and Reporting NEW

Question	Your CMS Vendor's Answer
Does your CMS provide native analytics for content and campaign performance?	
Can authorized business users create and configure dashboards and reports without technical support?	
What engagement, conversion, and journey analytics are available out of the box?	
Does the platform report on content freshness, publishing performance, and broken links?	
Can analytics data be exported, and does it integrate with external analytics and tag-management tools?	
For on-premise deployments, are analytics features fully available, or do any depend on a cloud service?	

12. Approvals and Workflows

Question	Your CMS Vendor's Answer
How are approval and publishing workflows configured? Can they be built in a visual interface?	
Do workflows control which users and roles can perform specific actions?	
Does the CMS support multiple workflows across different sites or sections?	
Can you enforce mandatory, non-self-approvable steps (for example compliance approval / maker-checker)?	
Does your CMS automate notifications to users and roles?	
Does your CMS validate content and metadata (required fields, field types)?	
Can content be scheduled for publishing and automatic expiry?	
How does your CMS promote content and configuration from lower environments to production?	

13. Accessibility NEW

Question	Your CMS Vendor's Answer
Does your CMS support building and publishing sites that meet WCAG 2.1 / 2.2 AA?	

Question	Your CMS Vendor's Answer
What authoring-time accessibility support do you provide (alt-text prompts, contrast checks, heading structure, accessibility validation)?	
Is the authoring interface itself accessible to editors with disabilities?	
Do you provide accessibility audit or reporting tools?	
Can you provide a VPAT or equivalent accessibility conformance statement?	

14. Implementation

Question	Your CMS Vendor's Answer
Do you provide pre-built starter kits to speed implementation?	
What process do you follow to define site navigation and information architecture?	
Can a non-technical user rearrange sections of a site? Does changing site functionality require coding?	
Describe your upgrade model. Are customers kept continuously current (evergreen), or must they migrate between major versions, and how disruptive is a typical upgrade?	
Do you deliver implementation in-house or through partners? Describe your partner model and oversight.	
How long does it take to implement the CMS and launch a fully functioning site?	

15. Templating and Design

Question	Your CMS Vendor's Answer
Does your CMS provide NoCode page building and layout capabilities?	
Can marketers build pages and experiences with drag-and-drop elements?	
How easily can non-technical users apply design changes?	
Can every element of the site be designed and edited in the CMS, or are third-party tools required?	
Does the platform support a shared design system and reusable components across sites and brands?	

16. Multi-Site and Multi-Brand Management NEW

Question	Your CMS Vendor's Answer
Can your CMS manage multiple sites and brands from a single instance? Is there a limit on the number of sites?	
Can themes, templates, components, and layouts be built once and reused across multiple sites, with per-site or per-brand overrides?	
When a shared template or component is updated, can that change propagate automatically to every site that uses it?	
Can content be authored once and reused or syndicated across multiple sites, with the option to localize or vary it per site?	
Can you run a shared design system with per-brand variation (colors, logos, typography) across sites?	
Can each site manage its own domains, languages, navigation, and configuration independently, within central governance?	
How are governance, roles, and permissions handled across sites (central oversight plus site-specific scoping)?	
How quickly can a new site be provisioned, and do you provide starter kits or site templates to speed it up?	
Does the platform support logical isolation between sites or tenants where required?	
Does analytics and reporting work both per-site and in aggregate across the portfolio?	

17. Integration

Question	Your CMS Vendor's Answer
Can the CMS provide content-as-a-service via APIs to any front end (web, apps, signage, conversational devices)?	
Does the CMS support a hybrid content-delivery architecture?	
Which CRM, analytics, identity, and DAM systems does it integrate with?	
Does your CMS integrate with third-party front-end applications and frameworks?	
Does your system support a microservices / composable architecture? Describe how.	
Do you offer a marketplace or app store for third-party integrations?	

18. Roles and Users

Question	Your CMS Vendor's Answer
How does your CMS manage roles, users, and authentication?	
Do you limit the number of contributors or administrators?	

Question	Your CMS Vendor's Answer
Can you create custom roles and scope users to specific content areas or sites?	
Can a user hold multiple roles?	

19. Security, Privacy and Compliance

Question	Your CMS Vendor's Answer
Does your CMS support federated identity, single sign-on, SAML 2.0, and OIDC?	
What methods restrict unauthorized access, and what are your API authentication standards?	
Describe high availability, data backup, and tested recovery procedures.	
Can we export our data, and what is the process?	
Can you stream or export logs to our SIEM in near real time?	
Can you provide current attestations such as SOC 2 Type II, ISO 27001, and ISO 42001?	
How do you support compliance with GDPR and regional data-protection laws (for example the Saudi and UAE PDPLs)?	
For regulated or on-premise buyers, describe data-residency, tenant-isolation, and access-governance controls.	

20. Localization NEW

Question	Your CMS Vendor's Answer
How does your CMS manage multilingual content, and does it support right-to-left languages?	
Do you provide a translation workflow that keeps language versions aligned?	
Can language variants be created without re-architecting content?	
Do you offer AI-assisted or machine translation, and can it be reviewed before publishing?	

21. Customer Support

Question	Your CMS Vendor's Answer
List the training videos and documentation available for your CMS.	
Describe your technical support model: procedures, communication methods, schedules, and community channels.	
What are the support tiers and response-time SLAs?	