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## CTRL+CLICK CAST #096 - Demystifying CMSs for Clients

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**Preview:** When you figure out the real motivations behind a business, you don't really even have to wait for them to tell you about functionality, you can be proactive with your suggestions and even how you describe things.

[Music]

**Lea Alcantara:** From [Bright Umbrella](#), this is CTRL+CLICK CAST! We inspect the web for you! Today, Emily and I are concluding our Demystifying Web series by tackling CMSs for clients. I'm your host, Lea Alcantara, and I'm joined by my fab co-host:

**Emily Lewis:** Emily Lewis!

**Lea Alcantara:** [Craft CMS](#) is excited to announce they have partnered with [Arcustech](#) and [fortrabbitt](#) as Craft's Hosting Partners. Both of these great hosting partner offer Craft-optimized plans and work directly with the Craft team to bring you the best customer support possible. To learn more about Arcustech, fortrabbitt and other Craft partners, visit [craftcms.com/partners](https://craftcms.com/partners).

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As an aside, that page looks mighty good, wouldn't you say, Em?

**Emily Lewis:** [Laughs]

**Lea Alcantara:** I think somebody really talented must have designed that.

**Emily Lewis:** Yeah. I think someone named Lea Alcantara.

**Lea Alcantara:** [Laughs]

**Emily Lewis:** [Laughs]

**Lea Alcantara:** I think so. Yeah, I think I'm familiar with that person. [Laughs]

**Emily Lewis:** Yeah, we were excited to partner with Craft last year on the redesign of their partner page. So go check it out, everybody. So today, Lea, we're going to wrap up this new adventure of trying to do a series on the podcast.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** If you haven't tuned into the first two parts of this series, you should. We first talked about web design from a client perspective, from a human-friendly perspective.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** And then we tackle development, mostly front-end development, in part two, and both really explain why we've decided to do these episodes and why do think it is important to talk about the web when we're talking to clients or prospects or even just someone at a networking event,



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talking about the web in less technical terms and from a less technical perspective to something that's relatable and understandable.

**Lea Alcantara:** Yeah, absolutely. I do think that overall our industry needs to stop being pedantic.

**Emily Lewis:** Yes.

**Lea Alcantara:** You know, talking about all the technical exceptions and approaching these types of discussions in a more thoughtful way.

**Emily Lewis:** I saw it just the other day, so I think this perfectly illustrates why I think this is important. So A Bright Umbrella is in the business of marketing our services to clients. We want to do that in a way that they understand what we do and why it's going to be valuable to them, and one of the keys of doing that is not talking about the, "Oh, well, you know, you could do this software and go this way, or you could support this mobile device with this approach or this, that and the other." Clients don't want to know that.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** That's overwhelming. They're not going to deal with you. Sure, you may feel smart, but it's not going to get you the job or you're going to end up having a difficult client relationship or tough client communications, and I saw this just the other day. I saw on our Twitter, we post things to our client audience, and it isn't in technical terms. It's about business goals and business needs, and sure enough, our colleagues replied back, "Well, you know, in these situations this might be more relevant."



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And they're absolutely right, but that's not what we're doing. We're not trying to make ourselves be smart in front of our clients. We want our clients to perceive us as being useful, as partners who are go help them reach their goals, and far too often, our clients aren't uber tech savvy.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** They might have some knowledge, but what they do know is they do know their business and they do know about goals and they do know about priorities, and so that's the angle that we are trying to take and really trying to encourage everyone else to take, and as they do that, take a step back and wonder, are you saying something just because you want to be smart? [Laughs]

**Lea Alcantara:** [Laughs]

**Emily Lewis:** Is that the point of your thing or are you actually trying to like engage someone in a thoughtful conversation?

**Lea Alcantara:** Right. And it's remembering that we're here to remove pain points for the client. Yes, the foundation of all our technical knowledge, that's the reason why we're in our business, but you don't have explain every single nuance for them to understand what the particular benefit is, and based on our experience, we just came from a design conference and speaking about CMSs and things like that, and half the time, when we had these types of discussions, they were really interested over the technical stuff. It was just like, "Well, how can this make my life easier?" Right?

**Emily Lewis:** And this is something you and I are sort of advocating for and we're practicing it, but I don't even think we are perfect at it.

**Lea Alcantara:** Oh, no.



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**Emily Lewis:** Just the other day, we had a meeting with a client who has been a client for years and years, and she's pretty tech savvy, but one of their problems that we needed to solve, it really did have like three different technical approaches, each with its own sets of pros and cons, and I made the mistake of going through each of those technical things with her, and even the pros and cons were on the technical side. All three would achieve the goal. So I ended up taking this approach, and it ultimately has delayed the launch of the solution because the client is so confused about, "Well, which one is better?" I shouldn't have even presented those to her.

**Lea Alcantara:** Right.

**Emily Lewis:** They were all relatively same budget-wise. They all would have to be tested, and if it fails, we'd have to resolve that anyways. So I should have simply said, "Okay, we have a solution. We're going to do it. You'll have it ready to test in two weeks." And it's a failure on my part of thinking that the client, because she has some understanding of the CMS, that this level of technical detail was going to be valuable to her, and it wasn't.

**Lea Alcantara:** Right.

**Emily Lewis:** It's a waste of time and it has confused her, and ultimately, our solution was, "You know what, I'm just going to put it in place, we'll test it, and see how it goes," and I didn't even tell her which way we were going to go.

**Lea Alcantara:** Right, because it's not relevant.

**Emily Lewis:** Right.

**Lea Alcantara:** It's not relevant. Again, technology and design is in service of an end goal. Whatever that end goal is, whether it's financial goal or information, et cetera, all design and development is in



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service of those particular goals, and if you've been listening to this Demystifying series, you should already know.

**Emily Lewis:** Yeah. So now, let's talk about content management. So you mentioned, all of this is for goals, these goals really can only be supported through content.

**Lea Alcantara:** Yeah.

**Emily Lewis:** No matter how great your design is, if you don't know what content you're designing for, your design is probably not going to be that great.

**Lea Alcantara:** Right.

**Emily Lewis:** Or if you don't know what the content you need to develop for your development, your front end and CMS might not be that great, so it really does start with content.

**Lea Alcantara:** Yeah, absolutely, and that's why content management is really important, and most clients can benefit from a content management system or CMS.

**Emily Lewis:** We do, though we just recently spoke with Ben [Furfie] about having site situations where the client a CMS might not be the best fit, and we'll definitely link to that in the show notes, but for most of our clients, a CMS really is a strong benefit for their websites.

**Lea Alcantara:** Let's talk about those types of clients. Let's start with the types of projects and clients that are ideal for a CMS.

**Emily Lewis:** Yes.



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**Lea Alcantara:** So who can get the most benefit from investing in a content management system?

**Emily Lewis:** Yeah. I think any client who really wants control of their site, especially those who have had experiences where they've felt frustrated or got delayed or hamstrung because they wanted something changed on their site, but had to wait for their internal IT department or a vendor developer to make a small change. So they don't want to be in that situation anymore. They really want to update their site themselves and control it.

**Lea Alcantara:** Yeah, absolutely, and of course, companies that rely on the web as an integral and ongoing marketing tool, a CMS would be definitely useful for them.

**Emily Lewis:** Yeah. And of course, your publishing companies, organizations that are really putting out a lot of content, blogs, news organizations, online magazines.

**Lea Alcantara:** Yeah.

**Emily Lewis:** And similarly, people who are doing that, those content creators, writers, artists, musicians, influencers, anyone who's creative.

**Lea Alcantara:** Yeah. And of course, companies that sell products and services online.

**Emily Lewis:** Yeah. I can't imagine doing that without a CMS of some kind. [Laughs]

**Lea Alcantara:** Yeah, I mean, I do believe before the popularization of CMSs and everything, people would just shove in a PayPal button or something like that.

**Emily Lewis:** Right.



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**Lea Alcantara:** And technically, that's still possible, but the more products that you sell and the more complicated your business could be in the options, et cetera and so forth, a CMS would be a better solution than plugging in a PayPal button.

**Emily Lewis:** Right. The flipside is really similarly, similar to our conversation with Ben, is if you're working with a business owner who really just has an online presence with a phone number and an address and that's really it, then maybe CMS isn't the right investment.

**Lea Alcantara:** Yeah. But if a website is an integral part of your business, having a CMS is very important.

**Emily Lewis:** Yes, yes. And it's a topic that not only Lea and I talked about a lot on the show, but we've written a lot of blog posts about choosing the right CMS and even gave a talk in May at HOW Design Live on [choosing the right CMS](#), and so we will link to all of those resources, blog posts and the presentation in our show notes.

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**Lea Alcantara:** So let's get started on the nitty-gritty about how people even talk about CMSs.

**Emily Lewis:** Yeah.

**Lea Alcantara:** I think one of the frustrating things is one thing we've come across regardless of client, industry or project, that there's a misperception that a CMS is really a tech or IT decision.

**Emily Lewis:** Yeah, because it really isn't.

**Lea Alcantara:** Right.



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**Emily Lewis:** Yes, you ultimately purchased software and manipulate it in some way to meet your goals, but once again, it's not about the software, especially the earlier parts of the discussions. It's really focusing on the benefits that CMS software can offer a client.

**Lea Alcantara:** Right.

**Emily Lewis:** It's how it can help them reach a goal.

**Lea Alcantara:** So it's not really about the CMS software itself or even how we implement the CMS. That comes later, right?

**Emily Lewis:** Yeah.

**Lea Alcantara:** We need to think about how this software affects the client's goals and needs because a right CMS, for example, can help increase donations for non-profits if you integrate with a right donation tool, for example.

**Emily Lewis:** We've seen our college/university clients save real money and time on printing and distribution costs by putting their catalog online and then not only is it searchable and online, it also auto-generates a PDF for anyone who wants a print copy.

**Lea Alcantara:** Yeah, absolutely, and of course, a business with a strong SEM [Search Engine Marketing] campaign can use a CMS that easily create and customize landing pages for those particular campaigns.

**Emily Lewis:** And so those are the kind of goals or needs that we would often see in an RFP or when talking to a prospect for a new project, do they need to donate? Do they need to have an online catalog? But this also is something that comes up with existing clients who already have a CMS. We



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still don't talk about the CMS that much. We instead continue to focus on the goal, and rather than thinking about how their existing CMS might meet the goal in those initial conversations, we just really want to get as much detail as possible from the client about the goal, and then our advice or our recommendation is really on the solution, not the technical solution, but how we're going to solve the goal.

**Lea Alcantara:** But all of this is easier said than done.

**Emily Lewis:** Yeah, it really is.

**Lea Alcantara:** Yeah, absolutely. So for sure, this like IT-focused thinking can definitely still continue in an established long-term client relationship, so it's kind of an ongoing process on both sides, for the client and of course us as vendors, to keep clients focused on the goals and the need of the website and their business versus the technology, especially if you're dealing with an IT department, and it's funny because since we started this Demystifying series, we've come up with a bunch of real-world examples that literally would happen like literally the week before.

**Emily Lewis:** Yes, so I think it was last week. [Laughs]

**Lea Alcantara:** Yeah.

**Emily Lewis:** We were in the middle of scoping and planning a CMS migration, and this is a long-term client we've had for a while, and they've worked with us, they know the value we bring. They're familiar with the kinds of questions we ask, but even still, when we were going through this discovery process for the CMS, there was a disconnect about why we needed to understand marketing, the marketing department's needs and how that translates to the CMS migration and the technology that will be involved.



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**Lea Alcantara:** Right.

**Emily Lewis:** And so again, this is an IT department and there's just a disconnect because we kept asking, "What are the digital campaigns? What does Marketing need to do to meet their needs?" It's those kinds of questions.

**Lea Alcantara:** Right, and they had no idea why it was relevant to how to build the system or even what services are necessary whenever these digital marketing campaigns are launched.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** So we actually had to break it down for them.

**Emily Lewis:** Yeah, and really what we did is we first understood what their goals were, which was something we kept in mind. For example, one of their goals is fast pages, and one of the things they said they wanted was more images on the site, and so we started asking them questions about the images, which led to the "Well, why does this have any relevance to the CMS?" So we paused what we were doing and we took some time to explain to them how all of these pieces fit together, how wanting more images on the site is a genuine request and a need, but there's a lot of stuff that then comes from that request and need that we then need to know.

**Lea Alcantara:** So like Emily said, performance and speed being a priority, then we need to figure out whether we need to hook up the CMS to a cloud-based service for faster distribution, and because this is a CMS question, because some CMSs have built-in integration for this while others might need custom development, and a lot of this is also budgetary concerns, too, so it's like, "Well, do you have the budget to have these assets in a cloud-based service, and if so, are we..."

**Emily Lewis:** [Agrees]



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**Lea Alcantara:** Because we can't just automatically say, "Everything goes to S3," what if they wanted to go to Rackspace or some other monthly-related thing, then some things might need different considerations and custom development regarding that.

**Emily Lewis:** Yeah, and it goes beyond. That would be like a third-party integration with a cloud-based service.

**Lea Alcantara:** Right.

**Emily Lewis:** But even just how their staff wants to manage these images.

**Lea Alcantara:** Right.

**Emily Lewis:** So will staff be working with the images to size them correctly, make sure not only the dimensions are correct, but the file size is appropriate? How comfortable they are with that versus, "Well, do they just want to upload it and have the CMS handle a lot of that stuff with them?"

**Lea Alcantara:** Right, exactly.

**Emily Lewis:** So it's not just a "Oh, we want more images on the site," and that's all the conversation is. It has to go further.

**Lea Alcantara:** Yeah, absolutely, and another thing in regards to how closely tied the CMS is to marketing, well, again, the question of images, are we going to have a set group of images so there's brand consistency and control over the look and feel, which is I think very important to marketing, or do they want the responsibility to have unlimited upload capability so anyone who has permission can upload a new photo, right?



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**Emily Lewis:** [Agrees]

**Lea Alcantara:** And so while the technical solution to all of that discussion is maybe like limiting admin logins or the number of uploads, the real problem we're trying to solve is whether the client values brand consistency and control more than infinite flexibility, and so as asking a marketing question directly affects how we're going to be implementing the image management completely.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** So you have to ask them what's more important, and I think a good developer will figure out the real motivation instead of just giving the client what they asked for and give your client what they need.

**Emily Lewis:** Yeah. And I feel like when these more detailed aspects come up, especially during the discovery process and we need to then present new questions to them, it's a real challenge on my part to say, "Okay, I could say this, well, do you just want to upload the images to the CMS and have it resize it for you?" Like because that sounds like a pretty simple question, but it doesn't address what you just pointed out, Lea.

**Lea Alcantara:** Right.

**Emily Lewis:** I should instead asked, "Does Marketing want to control the brand and keep it consistent or would they prefer to have as much flexibility as possible?"

**Lea Alcantara:** Exactly.

**Emily Lewis:** It's completely different phrasing.



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**Lea Alcantara:** Right. But it has the same solution at the end of the day.

**Emily Lewis:** Yeah. You get your answer.

**Lea Alcantara:** Right?

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Right. And then at this point, when we asked that other question, then we as developers and vendors have flexibility on how to implement that as well.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Because I feel like sometimes when I talk about these types of topics to other developers, they feel like, "Oh no, I've been forced to implement this way of thing, but maybe that's because you gave them that option in the first place. [Laughs]

**Emily Lewis:** [Laughs] [Agrees]

**Lea Alcantara:** Don't give them that option, right?

**Emily Lewis:** Yeah.

**Lea Alcantara:** So let's take a little bit of a step back in regards to this, so we've given you a little bit of a real-world example about how a client who might not understand some of these questions of being relevant to your CMS decisions, there's a lot of general questions that drive even figuring out how the web fits in their overall business and how that affects the CMS.



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**Emily Lewis:** Yeah. So again, just try and step back from a discussion about software or the technology or your technical implementation. Ask the question or phrase things from the perspective of like Lea said, the overall business. So one of our clients, their website drives 90% of all of their marketing efforts for real-world programs, and so when they come to us with a need, we're always thinking about how that need is going to meet their marketing goals.

**Lea Alcantara:** Yeah.

**Emily Lewis:** And so our questions are from that perspective, not about how the CMS might implement it.

**Lea Alcantara:** Right. In another client, their website is just for building their brand and reputation and so they might have simpler needs, and then because of that, then the decisions that we make for their technology and their software is vastly different than someone who needs 90% of their marketing efforts being pushed on the web.

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**Emily Lewis:** Right. Well, I mean, because that really comes down to, especially if you're a new project, we say it's not about software, but as the vendor, you know it's about software. It's just that's not what your conversation is about.

**Lea Alcantara:** Yes, yes.

**Emily Lewis:** So when you're talking to the client who says their site is 90% of their marketing, what that should translate to you in the back of your head is they need a really robust and flexible CMS.

**Lea Alcantara:** Yes.



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**Emily Lewis:** And oh, they have a lot of Salesforce campaigns, so it would be super nice if that CMS just naturally hook up to Salesforce.

**Lea Alcantara:** Yeah, absolutely.

**Emily Lewis:** You're thinking about that in your head, but that's not what you're saying to the client. You're talking about their marketing needs.

**Lea Alcantara:** And if it's mostly just for their brand and reputation, then that even affects the choice of CMS that you're giving them because at the end of the day, again, you're here to remove pain points and you don't want to implement a completely robust system for them that might overwhelm them and actually harm because they're too intimidated to update their website.

So if their website is there to like ease administrative time and cost by putting information in digital format online so they can refer to their clients to their site as a resource, that solution and the combination of templates and add-ons or whatever technical solution that you put together is going to be completely different than someone who just wants to bolster their brand and reputation.

**Emily Lewis:** Yeah. I mean, I think it really just underscores the conversation that we had with Ben because if you are implementing some really robust CMS for a client that simply doesn't need it, you run the risk of what you said.

**Lea Alcantara:** Right.

**Emily Lewis:** They're intimidated by it, so they don't use it. The site is stagnant or something like that, but even worse, you've spent their money on something they don't need. You've given them this thing and you've taken their money that they want to help support whatever their business goal is.



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**Lea Alcantara:** Right.

**Emily Lewis:** And you've built a CMS that does everything under the sun, but they don't want to do everything under the sun.

**Lea Alcantara:** And they feel like they're fleeced, right? [Laughs]

**Emily Lewis:** Oh, completely, yeah.

**Lea Alcantara:** And it's up to us as web developers and vendors and professionals to make sure that the decisions that you're making technically actually support their business so that they feel taken care of, right?

**Emily Lewis:** So we wanted to get into an analogy for this episode because we've done that with the previous two. The first one we did was sort of home buying and in part two, we did cars.

**Lea Alcantara:** Cars.

**Emily Lewis:** Car building, car design. So this one we wanted to also have an analogy of just something you could use to talk to clients about CMSs, and maybe to give them a little bit more context as to why you're asking the questions you should be asking rather than just saying, "Oh, we'll just build your site in WordPress."

**Lea Alcantara:** Right.

**Emily Lewis:** So we decided to go sort of like a food party route analogy. [Laughs]



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**Lea Alcantara:** Right, and naturally we're foodies, so it just made sense. So okay, think of it this way, say you're throwing a pizza party and you're a party planner. So you can throw a lot of different parties, but parties have similar elements like food, venue, et cetera, but all those elements need to be customized based on the client and the purpose of the party.

**Emily Lewis:** And so this is the same with CMS. As a vendor you can create lots of different websites, even a client can have different types of sites under the same business, whether they're micro sites or self-contained landing pages or whatever. So you need a system to launch these sites based on goals. Just like as a party planner, you need a system to launch a party based on a client or client's goals.

**Lea Alcantara:** Right, exactly. So when you're seeing like party planners/CMS vendor, you need to figure out like what's the theme of the party. Is it a kid's birthday party? Is it a casual get together? What's the purpose and goal of this party?

**Emily Lewis:** Same with the CMS, what are the goals of the business?

**Lea Alcantara:** And then you need to know who's attending this party. Are there any dietary restrictions? Is someone allergic to the guest pets, so the food needs to be served outdoors?

**Emily Lewis:** And this is the same for a CMS, you need to know who are the people who are going to be editing the content as well as what their technical skill and knowledge is.

**Lea Alcantara:** Absolutely. And now, we know the goal of the party and the audience, we have to ask what the content of the party is. So what's going to be at this party? Is there going to be other food besides the pizza? Is there going to be music? And if so, are we playing a Spotify playlist or is there going to be a live band?



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**Emily Lewis:** And once again, this is the same kind of question we would ask for CMS discovery. What types of content are we dealing with? What types of texts, images, audio or video? What are we working with here?

**Lea Alcantara:** Yeah, exactly, and these are the things that drive content management decisions.

**Emily Lewis:** So in a way, the CMS is for the website what maybe a really great binder would be for a party planner where you have a system that lets you manage multiple food options and different types of guest needs, or in the case of CMS, multiple types of content and different types of staff for admin needs. For the party planner, you're going to have food for vegetarians and maybe some gluten-free options, and from the CMS' perspective, that's like giving user permissions that make sure a blog author only sees the blog content they're allowed to edit and don't accidentally mess something else up on the site.

**Lea Alcantara:** Sure, and now that we set the stage with some real-world examples and human-friendly analogies, let's talk about some of the basics of CMSs in client-friendly terms. So let's start talking with content. We've been talking all about content, but that's actually a more loaded term than it seems.

**Emily Lewis:** So I just think about it if someone asked you to order pizza for dinner tonight, there's really a million ways you could order a pizza.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** So New York Style, Chicago Style, Neapolitan. Even knowing exactly what ingredient should be on the pizza versus the style of pizza, you need to know what that is to get the pizza you want.



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**Lea Alcantara:** Exactly, so for a website, that's understanding the content is not just texts. We're talking about images. We're talking about media, which is both sound and video, or even widgets like Twitter or Instagram feed, but beyond even that, you can have content groups or what clients might term as modules or design patterns that might need to be considered as groupings of these particular pieces of content.

**Emily Lewis:** So we want to know as much detail as possible about the content, so the client gets the pizza they want. [Laughs]

**Lea Alcantara:** Exactly. [Laughs]

**Emily Lewis:** And it's funny because the same client that we've been working with on the CMS migration, they're really hesitant to tell us specific content. They're like, "Well, we just needed to be infinitely flexible," and frankly the solution for infinitely flexible can also be the cause of problems with branding and consistency on a site.

**Lea Alcantara:** Right.

**Emily Lewis:** So it's consistently pushing back when they're like, "Well, we just want it be to flexible," so then I push back, "Well, describe what that looks like. Do you just want this to happen? Do you just want a big WYSIWYG field? So asking them more specifics, never just letting it be, "Well, it's going to be images and texts and audio, that's it."

**Lea Alcantara:** Right. And then also talking about the consequences of what infinitely flexible actually means, too, performance issues, right?

**Emily Lewis:** Yeah.



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**Lea Alcantara:** Like the more elements on a page that's dynamic, the slower the page is going to be. Even having a conversation, talking about, "Maybe we don't need to make the address field editable and just have that straight on the template because the address is going to not change ever," you know, stuff like that.

**Emily Lewis:** Right. Those are our solutions, not what we would say to a client, but like what would be thinking as ways to make the page perform a little better.

**Lea Alcantara:** Right.

**Emily Lewis:** And that's the kind of challenge, like you want to go, "Well, maybe we could do this," but what you could instead just think is, think about when we were Chicago, Lea, and we ordered the pizza...

**Lea Alcantara:** [Agrees]

**Emily Lewis:** The Chicago-style pizza takes longer.

**Lea Alcantara:** Oh, yes, yeah.

**Emily Lewis:** So we knew going into it that we were going to be there for a while and that was the approach, we knew that in advance. So if a client is saying, "Well, we want video on this page and three huge images and if they are still pushing back on it, we would say, "Well, we will build that, but it's just going to be like Chicago-style pizza for your visitors, everything may not load when they land on the page."



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**Lea Alcantara:** But then, just like what we did in Chicago, because we knew that as customers, we ordered other things ahead of time to help tide the speed stuff. So like as the technical vendor, we'd be like, "Okay, we could do lazy loading. We could do blah, blah, blah."

**Emily Lewis:** [Agrees]

**Lea Alcantara:** But that's not the type of thing you'll be discussing with your client. That's what you're discussing with your own team.

**Emily Lewis:** Internally.

**Lea Alcantara:** Yeah, exactly.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** But before you even do the implementation, you need to figure out how strongly does your client feel about these particular requests and making them understand what the benefits and consequences could be on that request without diving into technical terms.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Just say, "It will slow down the page. Yeah, okay, do you want a 5-second loading page? No? Okay, here are the [laughs] other options we can discuss." Right?

**Timestamp:** 00:30:02

**Emily Lewis:** Yeah, yeah. So in terms of content, I think using an analogy of pizza works because there are so many different ways of building a pizza and different toppings that might go into it,



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different approaches to it. In terms of talking about content management in kind of human-relatable terms, often I think struggle with, I say, “Well, a CMS gives you control of your content. It lets you update your content yourself, your site yourself,” and that seems simple enough, that seems to convey the benefit, but I think we can always do better, and rather than be general, be more specific. So a simple example of what, Lea, you and I know internally, a CMS can do is give marketing a lot of power without sacrificing their brands.

**Lea Alcantara:** Right.

**Emily Lewis:** So for example, they could choose a different color palette for different content modules without changing classes or getting into code or anything like that by giving them a simple interface to do that. So if I wanted to talk about that in sort of human-friendly terms, it’s a lot like building a custom pizza and you have a bunch of your friends over and you guys all are using the same crust and the same sauce, so you’ve got this foundation that’s the same, it’s going to be consistent for cooking and what the crust needs to rise or whatever.

But then you’re giving the customer all of the options for the toppings. So they can trust the foundation will remain the same. They know they’re getting the crust and the sauce that is available and has been proven to work, but they can put whatever toppings they want on it, and that’s kind of what a content management system can do, it protects that sort of foundation of the site, but giving them control not just of like their phone number, but even things like colors.

**Lea Alcantara:** Absolutely, and I mean, if we’re diving into the pizza analogy even more, you’re talking about, “Oh, you can have unlimited toppings, but that could make a mish-mashed pizza the same way unlimited color options could give you a mish-mashed website.”

**Emily Lewis:** [Agrees]



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**Lea Alcantara:** So asking about, again, brand consistency, how much control do you want, or do you want different unlimited toppings or should I just give you different combinations of toppings of that pizza like a vegetarian topping, Greek, all meat, those kind of things? You don't have to necessarily give them like a whole ingredient list per se.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** But again, that depends on the client, you have to have that kind of conversation over how much time and control they want to spend on all of this.

**Emily Lewis:** So a lot of these conversations that we're having sort of get additional information from the client. It's not only happening in the sales process or during discovery of a project. It really happens throughout our relationship with the client.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** It doesn't ever stop, and that means we always need to be practiced in this. So one of the things we rely on is repetition.

**Lea Alcantara:** Right.

**Emily Lewis:** Just like we mentioned in our previous episodes, when we're describing the importance of content or specifically why we need to understand the details of images, we mention it during discovery. Then when we're handing over comps, we're going to mention why we chose a certain image presentation in those comps and how it supports their original goals for images, and then when we get to actual testing on the browser, we'll mention the images again and how we've made sure the page still performs well, and so it's an ongoing reminder that at every stage of this, we're keeping those goals in mind and we're using the same language and the same analogies, or hopefully trying



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to, so the client starts to get really familiar. We're building this sort of shared vocabulary between us and them about their system, their CMS.

**Lea Alcantara:** Yeah, definitely. It's so important to make sure that you take responsibility for the work that you're doing and you can't assume that just because you've explained it once, that the client remembers. Because it's not their job to remember, their job is to market their website or update their website or make sure that the server is stable. Those are their priorities and then your priority is to make sure that their job is easier in order to manage that particular website.

**Emily Lewis:** So a lot of the times that we are talking about content management systems though with a client is really in the discovery process.

**Lea Alcantara:** Right.

**Emily Lewis:** And I really think, Lea, you and I think it's probably one of the most important parts of any project is the discovery.

**Lea Alcantara:** Yeah, absolutely. You have to go through a CMS discovery with your client to really understand their non-technical needs so then you as a vendor can tailor them toward the right solution.

**Emily Lewis:** Like I mentioned, we'll post a couple of links in our show notes to some of the articles we've put together, but I think it's worth sharing some of the key questions we asked.

**Lea Alcantara:** Right.

**Emily Lewis:** So we mentioned, we asked what the content is, and depending on their response, we will dive deeper as needed. But we're also going to be asking them, "Don't just tell us what your



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content is, what's the point of your content? What does it supposed to be doing? What's the priority of it? Are you just not... not just, but are you simply sharing information like a research paper and article that's relevant to your business, or are you doing some heavy marketing where there's a specific promotion or a call to action? Where does SEO fall into this? Is it all of the above? Do you have to meet all of those needs?"

So we really don't just ask what the content is, but also what the purpose of the content is, and if their answers don't align with their already stated goals to us, we will push back.

**Lea Alcantara:** Yeah, absolutely, because it's important to know exactly what they're trying to do, so you can make sure that their goals are actually achieved. If it's contradicting those goals, it's your job to say, "I don't think that's going to help you."

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Because sometimes clients say like, "I want this," and then if you personally feel as a vendor, and as reflecting based on their goals and things like that, this will harm their business or that their money could just be better spent elsewhere, like maybe it won't harm their business, but it's a waste of time, then that's also an important conversation to have, right?

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Another question that we like to ask marketing is describing their workflow like, "How would you like to update a landing page for recruitment campaign? Just give us like a walkthrough." In some ways, this is a little bit like a usability test, right?

**Emily Lewis:** [Agrees]



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**Lea Alcantara:** “Just please tell me how you would do this X action.” And then we just have them talk it out, “Do you want to choose between an image or a video? Will there always be an image?” It’s those kinds of things. We just try to tease those types of interactions out from our clients.

**Emily Lewis:** Then of course, another key part of our discovery questions are about the staff themselves and their permissions.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** For us, this mostly comes into play with editorial workflows where there are certain staff members who are only supposed to write certain types of content and then other staff members who are supposed to approve that content and then trigger it for publication. Those are actually really important to get them to talk through. I think the client that we’re working with to scope a CMS migration is a great example. Their current system has quite a large number of member permissions. No one really knows what they’re for anymore. This is an inherited site so we don’t know what was the intention really.

**Lea Alcantara:** Right.

**Emily Lewis:** But who’s on staff now no longer knows what that supports. So then they drafted out a couple of different scenarios of how permission should go, which were doable so we asked a little bit more to describe more, “Well, give us the scenario where there’s just one person who can only edit this one page?” And the minute we started asking them for more details like, “You know, we don’t actually need all this.”

**Lea Alcantara:** Yeah, exactly, exactly.



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**Emily Lewis:** “We’ve taken the time because you kept asking us more questions and we don’t actually need all this,” which is probably going to save a little bit of time and a little bit of money, and it will certainly save some headaches down the road because staff turnover can definitely change how people use and view the CMS.

**Lea Alcantara:** Don’t implement something they don’t need simply because they said or thought they needed it, right?

**Emily Lewis:** Yeah.

**Lea Alcantara:** Asking these probing questions are really, really important, and it saves some money and time in the long run because as you mentioned, in the current iteration, there is how many different member permissions and workflow stuff, and what the reality is, is people get confused and don’t use them.

**Emily Lewis:** Yeah.

**Lea Alcantara:** And then there’s no workflow and then there’s just chaos, right?

**Emily Lewis:** Yeah.

**Lea Alcantara:** But if you ask these questions right away in these in-depth CMS discovery, then you can avoid those particular headaches.

**Emily Lewis:** One of the things that we’ve done to help us in this process is create a discovery questionnaire. We’ve tried to make it sure that all the questions in it are from this more business goal-focused perspective. They’re not phrased from a technology or software perspective, but more like, “Describe your ideal workflow, and explain how this feature supports the digital marketing.”



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So it's more like that, and we share it with the client and ask them to fill it out, and then we review their answers and respond and then we have a call to go over it. It's touched multiple times, but generally speaking, I think that that would be a good tool for anybody to use some kind of questionnaire that forces the client to get into this sort of explain your business goal's mindset.

*Timestamp: 00:40:20*

**Lea Alcantara:** Right. And if you're creating your own questionnaire, with your general categories, we grouped our questions as so we make sure we ask questions about known core features and functionality. Don't ask them questions where you already know the answer to. This is also another opportunity for you to share that you've been listening to your client, right?

**Emily Lewis:** To that point, when we do have answers and we share the questionnaire, we put the answers in the questionnaire before we send it to them.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** So demonstrating that, "These are things we've already heard from you," and it allows them to validate that.

**Lea Alcantara:** Yeah, absolutely. Or correct it.

**Emily Lewis:** Yeah.

**Lea Alcantara:** Because sometimes that's literally what happens, they would be like, "Oh, we wrote that a week ago, but now we changed our mind." Right?

**Emily Lewis:** [Agrees]



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**Lea Alcantara:** Another category, obviously, that we have questions about are the digital marketing, and then we have a category about specific content and the amount of customization needed for that content, who's going to log in and actually administer the site? What kind of workflow do those admins expect? How about the third-party services, are there any third-party services, e-commerce, and then we have questions about maintenance?

**Emily Lewis:** And we don't have this questionnaire publicly available and I really don't see us doing that as generous as we usually are. [Laughs]

**Lea Alcantara:** [Laughs]

**Emily Lewis:** That is something that is in-house, but we do have a PDF download that it's ten questions that we always ask as part of this questionnaire that we think provide a good foundation to sort of start that discovery process or if you're in the sales process, to get your client in the mindset again of their goals and not technology so that you can have more productive conversations.

**Lea Alcantara:** Right. And I mean, I do want to point out that it sounds like we know what we're doing, but we've struggled with pulling back on these technical discussions, right?

**Emily Lewis:** Oh, yeah.

**Lea Alcantara:** Like even these categories that I listed here like third-party services, would a client who's not technically inclined completely understand what that means, right?

**Emily Lewis:** Yeah.

**Lea Alcantara:** So these categories and these questions can get really technical and for a client who doesn't understand the point if you don't phrase these questions in layman's terms or associate them



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with a clear business benefit or goal, a lot of this can get lost in translation and they may answer questions that you haven't actually asked simply because they didn't understand the question.

**Emily Lewis:** We are still practicing this. This is something that I feel like we are only probably a year and a half to two years into this sort of new way of thinking about how we communicate, but I do really think that it's useful. I feel like the discovery process that we're going through with this particular client for this CMS migration, it's probably one of the richest discoveries we've done.

**Lea Alcantara:** Right.

**Emily Lewis:** And I feel like it's going to get them a system that is going to meet the needs that they know they have versus a system that right now I think they sense it can do a lot, but they're not really sure how or why because staff has turned over to such a point that it's no longer the same people who were there when the system was built.

**Lea Alcantara:** Yeah. You really have to pull back and get to the real needs of your client.

**Emily Lewis:** Yeah.

**Lea Alcantara:** And when you're putting all these pieces of information and questions and other things together, you have to also think about the fact that even if you're talking to IT, IT might not be the only ones looking at this questionnaire, right?

**Emily Lewis:** [Agrees]

**Lea Alcantara:** That's so important. There is always I consider a shadow administration, I guess, that can affect the decision making and the clearer you put your terms and questions and your



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communication, then the more people understand your perspective without you having to, say, over justify something simply because something got lost in translation.

**Emily Lewis:** Yeah, and not just speaking of any human-friendly terms, but very focused on business value.

**Lea Alcantara:** Right.

**Emily Lewis:** I think the point you just made is excellent. We will do audits or put together proposals.

**Lea Alcantara:** Right.

**Emily Lewis:** And we know the people who are receiving it, but there are other people who are going to get it, too, and so we need to talk to the broadest audience possible, so whenever we're writing something that in somewhere another is recommending a client do something or a prospect, everything we recommend we want to say, "Because it will do this for you."

**Lea Alcantara:** Right.

**Emily Lewis:** And not, "We will give you a fast website." No. "We will give you a fast website so that it does this for you." You know?

**Lea Alcantara:** Right.

**Emily Lewis:** It's based on what you know their goals are.

**Lea Alcantara:** Right.



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**Emily Lewis:** Don't just assume they want a fast website because all their users are on smartphones.

**Lea Alcantara:** Right.

**Emily Lewis:** That's an assumption, unless they told you that, so finding out why they wanted the site to be fast and then emphasizing that value in whatever you're recommending. That way it's not just clear to the people you've already had conversations with, it's clear to the person who's reading that recommendation for the first time.

**Lea Alcantara:** Right. And when you figured out the real motivations behind a business, you don't really even have to wait for them to tell you about functionality, you can be proactive with your suggestions and even how you describe things.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** So for example, with that performance discussion that you mentioned, it was almost a competitive need for it to be fast.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** So it really helped when we gave our recommendations to show other websites in their sector performed.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And that really gives them a better perspective, especially if their motivation for a faster site beyond just conversions or whatever is to be competitive against something else, right?



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**Emily Lewis:** Right. Lea and I really want to stress that the bulk of discussion about content management and content management systems is not about software. It just isn't. No matter what, it just isn't.

**Lea Alcantara:** Right.

**Emily Lewis:** But inevitably, you do have to talk about software.

**Lea Alcantara:** Yes, you do, right.

**Emily Lewis:** For us, we are internally talking about software from the beginning.

**Lea Alcantara:** Right.

**Emily Lewis:** We're kind of assessing out what we're learning and what we think is going to be a good fit for it, but we don't really bring that into the conversations with a client until we've done all of the discovery that's necessary. Frankly, it sort of depends on the scope of a project, how much discovery is necessary. But eventually, you do have to talk about software and sometimes it maybe the client just straight up ask you and you don't want it to be like, "We're not going to talk about software right now." [Laughs]

**Lea Alcantara:** Right, right, right.

**Emily Lewis:** You don't say that.

**Lea Alcantara:** Right.



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**Emily Lewis:** But when the topic does come up, I think the pizza analogy does well here. We do mention the software we prefer. When we do mention it, we say why we prefer it.

**Lea Alcantara:** Yeah, exactly.

**Emily Lewis:** So we don't just say, "We build Craft sites." We say, "We build Craft sites because we really like the flexibility it gives our clients and most of our clients can learn how to use it in under an hour." It's something like that.

**Lea Alcantara:** Yeah.

**Emily Lewis:** And so that there's a specific value to why we prefer that software. So we'll mention that, but then when the conversation does come up where we do want to present a specific software recommendation to a client, we often rely on a little matrix tool where we identify the high-level goals that the client has shared with us, what we know are specific goals, and then in the column section and in the row section are different CMSs and then in the intersecting boxes, we note which CMS is really strong for, let's say, security, and which CMS is really strong for flexibility and we give a matrix to them to give them a little bit of comparative information, but also reiterate why we prefer the one that we prefer.

**Lea Alcantara:** Right, yeah.

**Emily Lewis:** And this is something that is a really effective tool in a proposal, but also really effective when you're having those early discussions and someone is like, "Well, why can't we just have WordPress."

**Lea Alcantara:** Right.



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**Emily Lewis:** Or, “Why do you use ExpressionEngine?”

**Lea Alcantara:** Yeah.

**Emily Lewis:** So you’re not getting into that argument because it’s kind of like [laughs] asking someone what’s the best kind of pizza...

**Lea Alcantara:** Which can get into a really touchy subject for some people.

**Emily Lewis:** [Laughs]

**Lea Alcantara:** I remember even The Daily Show, Jon Stewart had a giant rant about pizza.

**Emily Lewis:** [Laughs]

**Lea Alcantara:** [Laughs]

**Emily Lewis:** People have their favorites.

**Lea Alcantara:** Right.

**Emily Lewis:** And more power to you, we’ve got our own. Our perspective, it’s pizza, it feeds you.

**Lea Alcantara:** Right.

**Emily Lewis:** That’s sort of what a CMS is. [Laughs]

**Lea Alcantara:** [Laughs]



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**Emily Lewis:** They will all get the job done. It's about, will it be on budget and will it be easy for your staff to use or will it be tons of hoops to jump through? I mean, technically speaking, every CMS could probably do everything a client needs depending on how much you throw at it to make it so.

**Lea Alcantara:** Yeah, absolutely.

**Emily Lewis:** But that's not useful for a client to know so it's really about emphasizing those high-level goals and how a given software would support those high-level goals.

**Lea Alcantara:** But you've kind of touched on something that is really important. Sometimes a client might just go up to you and say, "I want a WordPress or a Drupal site or something like that."

**Emily Lewis:** Right.

**Lea Alcantara:** So how would you address that type of challenge when there's a well-known brand in an industry and they're trying to essentially force a technological solution before you even know their business?

**Emily Lewis:** Yeah, and again, I think the pizza analogy is a good one for this. I'm not a pizza person so I'm not trying to offend anyone who has their pizza preferences. [Laughs]

**Timestamp:** 00:50:04

**Lea Alcantara:** [Laughs]

**Emily Lewis:** But everyone pretty much knows what Pizza Hut and Papa John's are, right?

**Lea Alcantara:** Right.

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**Emily Lewis:** But does everyone think those are the best places to get the best pizza? So if your bottom line is you want a pizza, then great, go order for them, you'll get a greasy pizza. But if you have some special event coming up where you really want something unique or different, then you don't want just pizza, you want maybe some high-end artisanal pizza.

**Lea Alcantara:** Right.

**Emily Lewis:** And then there are options all the way in between, your local joint that has a good slice or even something that you might take out of the freezer and eat up. [Laughs]

**Lea Alcantara:** Right, exactly, exactly. [Laughs]

**Emily Lewis:** They all fulfill that fundamental goal of being pizza. [Laughs]

**Lea Alcantara:** [Laughs] Right.

**Emily Lewis:** But just because Pizza Hut and Papa John's are well known, I don't think anyone would say they're the best places to get pizza nowadays. Convenient, maybe fair priced, but the best pizza? It's definitely a question.

**Lea Alcantara:** Right.

**Emily Lewis:** And that's kind of how we feel about clients who come to us with these brand names because almost ten times out of ten, it's not because they've used it before and they love it. It's because they've heard it.

**Lea Alcantara:** Right.



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**Emily Lewis:** So we want to encourage them that just because you've heard of WordPress, that doesn't mean it's the best fit for your site. What do you want your site to do? And again, that begins that conversation about goals and what you want your site to do. And when you as the vendor know what those goals are, you can say, "Well, I am certain that WordPress is not going to be able to do what you want the way you want to do it, but this other software will because of these specific reasons."

**Lea Alcantara:** Consider the context, right?

**Emily Lewis:** Yeah.

**Lea Alcantara:** Who's the audience? What's the motivation for the website, and how can you give them the best experience possible?

**Emily Lewis:** I guess one more thing that also inevitably comes up, especially when we're talking about software, are things that are called add-ons or plugins. I think those are the main names that I'm referring to.

**Lea Alcantara:** Right. So that's a very technical term, and so when we talk to clients about them, it's just we explain, "They're just other pieces of software that aren't necessarily written by the specific CMS creator themselves, it's another developer, that could be us or someone else, that adds new functionality to that base software."

**Emily Lewis:** And just like we don't talk about software much, we also don't talk about add-ons much. I think the extent of our conversations about add-ons or plugins with clients is that our goal is to use as few as possible because the bottom line for us, having been in this business as long as we have and have had as many long-term clients that we've maintained through the years, the fewer add-ons involved, the less disparate independent pieces of software need to be maintained.



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**Lea Alcantara:** Right.

**Emily Lewis:** So it's just simply from just a maintenance perspective, it makes upgrading easier.

**Lea Alcantara:** Right.

**Emily Lewis:** It makes it faster, so it's more affordable for the client and it gets done faster for the client as well as for us. And also the less add-ons you have, the less pieces that are potentially vulnerable to security flaws.

**Lea Alcantara:** Yeah, absolutely, especially if you're talking about WordPress.

**Emily Lewis:** Yeah.

**Lea Alcantara:** Yeah, right.

**Emily Lewis:** So that's kind of the extent of our conversations about add-ons. We really just don't get into them. Clients bring them all the time, especially like, "Well, with WordPress, we use this Yoast add-on for our SEO," and I'm like, "Oh, that's great," and in my head, I know the CMSs we work with can do that without an add-on, but it's not necessary for me to educate that client about that. I just know that they have some SEO needs, and we will handle it differently.

**Lea Alcantara:** And when we're talking about plugins and add-ons, I think that leads nicely to integrations, right?

**Emily Lewis:** Right.



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**Lea Alcantara:** So whenever we're talking about CMSs, a lot of it has default features to manage content, but oftentimes, the website needs to work with other websites or a third-party service like Salesforce or MailChimp, and that's technically what integration is.

**Emily Lewis:** Yeah. So whenever we've seen an RFP like Salesforce integration, can you tell us what it to do? Because that can be a really loaded term, Salesforce integration.

**Lea Alcantara:** Right.

**Emily Lewis:** That could be a very complex program between Salesforce and the CMS, but it could also mean that we just drop in a Salesforce code into a certain form and that's all there is.

**Lea Alcantara:** Right.

**Emily Lewis:** So whenever we hear integration, again, we want to get to the point of why they want that integration. What is the business goal? So you have an online event registration. The registration needs to update Salesforce because Salesforce is managing the campaigns that drove people to the event registration and you want to see the tracking of what converted. Well, that's what we want to know, so that's the scenario, not just Salesforce integration.

**Lea Alcantara:** Yeah, absolutely, and it could even as simple as when someone says, "I want Twitter on the website."

**Emily Lewis:** Yeah.

**Lea Alcantara:** That could be as simple as, "I'm going to copy paste the JavaScript widget and we're done." Or did they want the CMS, whenever a new blog post is posted, to auto post a link to Twitter and then when somebody comments, then something shows up on the website. It's those kinds of



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things, right? So whenever someone “simply” asks, “I want Twitter on the site,” you have to ask further questions over what that actually means, which could be simple or complex.

**Emily Lewis:** And again, you don’t go into the simple or complex with a client. It’s not relevant to them.

**Lea Alcantara:** Right.

**Emily Lewis:** You just want to know what they want to do and then you internally can assess out the approach you’re going to take.

**Lea Alcantara:** Right.

**Emily Lewis:** And aside from this episode reflecting on everything we’ve talked about, I think we’ve just super underscored the point of having like meaningful deep conversations with your clients about their website and digital web needs, and it may feel, especially if you’re listening to this and you’ve not done this before, like it’s a whole lot of extra work, and it is, and frankly, it’s extra work on the client, too. They need to know that this is something they’re going to go through with you so that their expectations are set.

But not only are you really narrowly defining the scope of your investment and clearly having goals for everything that you build, which means you could then measure those, and you could listen to our last episode with [Terri Jenkins about Google Analytics](#), but you are really demonstrating to your client what it’s like to work with you, but that you have an investment in their business.

**Lea Alcantara:** Right.



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**Emily Lewis:** Not just an investment in building them a CMS and a website, but that you're learning about their business, you're showing what you're leaning, you're showing your interest in their business and their goals and it's creating that relationship that if you are like us, it will lead to long-term partnerships, long-term clients, and that's a big part of our business. It's something that we really enjoy having that to be a big part of our business.

**Lea Alcantara:** Right. And explaining all parts of the process is really important with the client. So before we wrap up this final episode of our Demystifying series, we need to explain to clients how web design and development is intrinsically tied to a content management system.

**Emily Lewis:** Yes.

**Lea Alcantara:** A fatal flaw to me for many clients is thinking that each area is separate from each other, but one decision in one phase will affect the next, and that's so important to emphasize.

**Emily Lewis:** Yeah. I mean, you can just think about your client asking for like a flexible layout and a per page content and being able to flexibly change colors for different content modules or pages. That is certainly a CMS question because we need to know how we're going to easily allow them to change page layout or color.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** But long before we ever get to that in terms of implementation, our designer needs to create a system that works with that that supports the client's brand.

**Lea Alcantara:** Absolutely.



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**Emily Lewis:** If this new need to change layout and color shows up in the middle of CMS implementation and we don't have design for that, well, how do we support that goal?

**Lea Alcantara:** Right. That's just going to delay the project.

**Emily Lewis:** Yeah.

**Lea Alcantara:** And piss everyone off at the end of the day. [Laughs]

**Emily Lewis:** Yeah.

**Lea Alcantara:** And of course, once the designer does develop a system, the designer needs to speak to the front-end developer to make sure that the code can be flexible to allow for those different types of content, layout and color and styling. The classes need to be created in the first place, right?

**Emily Lewis:** Yeah, so again, we do try to keep this clear in our communications with the client from beginning to end, which is that everything they asks for from beginning to end has a domino effect that leads to the final site that leads to the final CMS that supports that site. So anything that changes in between that will affect other things and it just has to be underscored a lot for the client.

**Lea Alcantara:** So at the end of the day, the final lesson for this entire Demystifying series is this, think about the real problems you are solving, right?

**Emily Lewis:** [Agrees]

**Lea Alcantara:** They're client problems, they're business problems, human problems, design, development, CMSs, and you as the vendor are there to help fix these problems, not explain them,



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not to show your client how smart you are, which should already be default, that's why you're hired, right?

**Emily Lewis:** [Laughs] [Agrees]

**Lea Alcantara:** Like why would they hire a dumbass, right? [Laughs]

**Emily Lewis:** [Laughs]

**Lea Alcantara:** So your client communication should be focused on the problem and solution.

**Emily Lewis:** Yeah. I think this was a great idea for a series. I hope our listeners agree with us, but I think one of the things it has shown me is how much you and I still have to work on this, which is useful.

**Lea Alcantara:** Oh, yes, absolutely.

**Emily Lewis:** Sometimes you get so confident, you had a great conversation with a client and they understood everything you've said, but that doesn't mean that's going to be everyone. So it's a constant investment in ourselves in terms of how we speak to our clients and trying to find the best ways to communicate the business value of what we do for them. The more we can do that, the better we can do that, the better kind of engagements we're going to get and the better sites we're going to build because they'll actually be meeting needs.

**Lea Alcantara:** Very cool. All right, since Emily and I both have done our Rapid Fire Ten Questions and Em jumped me the last time and asked about my favorite karaoke song, I'm going to bug Emily this time with one question.



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**Emily Lewis:** Okay.

**Lea Alcantara:** What is your favorite meal of the day?

**Emily Lewis:** Breakfast. [Laughs]

**Lea Alcantara:** Oh.

**Emily Lewis:** I love breakfast. I love breakfast. I love breakfast.

**Lea Alcantara:** Specific breakfast food?

**Emily Lewis:** I don't know, maybe because it's like eating for the first time on a day that I like it.

**Lea Alcantara:** [Laughs]

**Emily Lewis:** I'm not sure. [Laughs]

**Lea Alcantara:** To set the tone.

**Emily Lewis:** Yeah. I'm a big fan of like egg based.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** I'm not a sweets-for-breakfast person, but yeah, when I think of breakfast, I think of savory eggs benedict or something like that.

**Lea Alcantara:** Yum.



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**Emily Lewis:** Yeah, but I get very excited about breakfast.

**Lea Alcantara:** Awesome.

**Emily Lewis:** I mean, unless it's cereal. That's not excited at all.

[Music starts]

**Lea Alcantara:** No, no, that's almost like a snack. [Laughs]

**Emily Lewis:** Yeah, yeah, morning snack. [Laughs]

**Lea Alcantara:** Yeah.

**Emily Lewis:** All right, so that brings us to the end of today's episode. Be sure to check our show notes for all of the resources we mentioned today.

**Lea Alcantara:** CTRL+CLICK is produced by [Bright Umbrella](#), a web services agency obsessed with happy clients. Today's podcast would not be possible without the support of this episode's sponsor! Thank you, [Craft CMS!](#)

**Emily Lewis:** We'd also like to thank our hosting partner: [Arcustech](#).

**Lea Alcantara:** And thanks to our listeners for tuning in! If you want to know more about CTRL+CLICK, make sure you follow us on Twitter [@ctrlclickcast](#) or visit our website, [ctrlclickcast.com](#). And if you liked this episode, please give us a review on [Stitcher](#) or Apple Podcasts or both! And if you really liked this episode, consider donating to the show. Links are in our show notes and on our site.



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**Emily Lewis:** Don't forget to tune in to our next episode when Rowena Luk joins the show to chat about the mobile web for global change. Be sure to check out [ctrlclickcast.com/schedule](https://ctrlclickcast.com/schedule) for more upcoming topics.

**Lea Alcantara:** This is Lea Alcantara ...

**Emily Lewis:** And Emily Lewis ...

**Lea Alcantara:** Signing off for CTRL+CLICK CAST. See you next time!

**Emily Lewis:** Cheers!

[Music stops]

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