How to Pick a Headless CMS in the Financial Industry

agility

When it comes to FinTech, choosing the correct technologies to facilitate your marketing efforts is just as critical as designing a successful website that can turn visitors into customers.

FinTech companies require technology that combines user-friendliness, adaptability, and safety in a single package.

This is one of the reasons why a headless content management system (CMS) is essential in ensuring your website is always prepared for the latest technological advances.

This eBook will describe the role of CMS in the financial business, benefits of CMS for the financial market, and what to look for in a Headless CMS.

Headless CMS for Fintech >

What is Headless CMS?

A headless content management system (CMS) functions differently than the traditional CMS, or monolithic DXPs that most FinTech companies are likely accustomed to using.

Monolithic DXPs are the all-in-one solutions that come with tools that often go unused and cost marketing departments way too much overhead.

A traditional CMS is built on an inflexible legacy architecture in which the frontend and backend systems are combined into a single solution.

A headless content management system, on the other hand, disconnects the frontend presentation layer from the backend architecture, hence eliminating the need for a head.

The backend is responsible for storing and managing content and data, and it uses APIs to communicate with the various frontend channels.

Consequently, content can be distributed across any channel, such as a website, a mobile device, a digital kiosk, or other locations.

✓ Publish
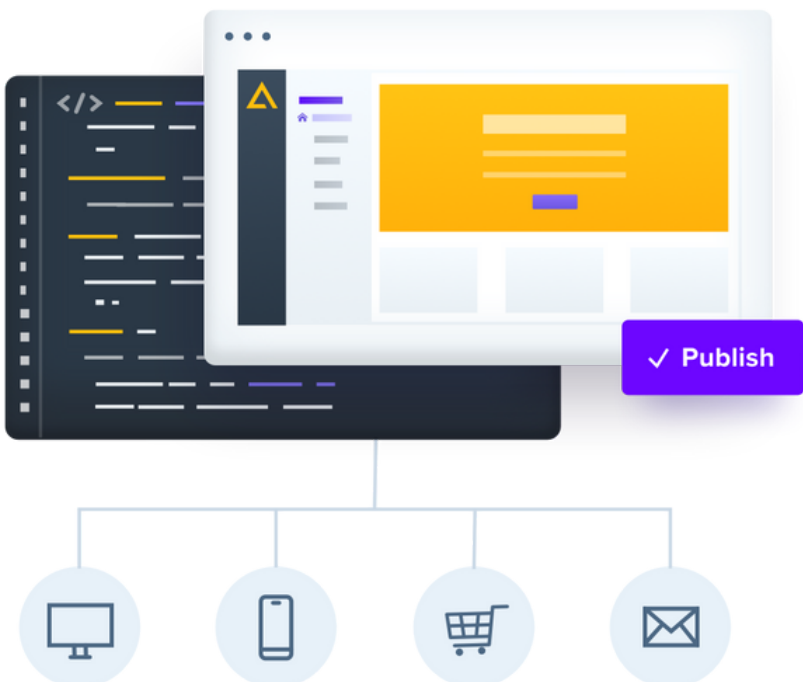
Key Points to Consider for FinTech Website

Increasing your website's traffic and conversions will depend on whether or not it meets these criteria:

Enhanced security

A safe website is essential to avoid the blunders of the world's largest financial institutions. Keeping your customers' data safe must be the priority.

For your firm to fulfill or surpass security requirements, your vendors must comply with standard regulations.

Focus on Your Markets

Creating website content that appeals to your chosen market segments and demographics is critical.

Your technology should allow you to quickly develop content relevant to your markets around those issues, whether through a physical location, unique items, or both.

Trustworthiness

Since customers want to access their information anytime and from any location, websites must be lightning-fast. Don't just focus on optimizing your website's speed; make sure it is always available, no matter where you host it. Customers are more likely to use a FinTech if they know that the company they're dealing with is trustworthy and reliable.

High Ranking

FinTech firms must utilize SEO to their advantage. A high search engine ranking is critical when there is so much competition.

In addition to being correctly indexed by Google, and SEO-optimized site is more likely to be found when potential customers search for products like yours online, thereby increasing your chances of sales.

The 37 Point Checklist for Fintech Companies Choosing a Headless CMS

Take a look at this 37-point checklist to determine if the headless CMS you're considering is enough for your organization's needs.

Initial Considerations

1.How will you use your CMS?

This depends heavily on your organization.

Start analyzing your current digital maturity levels and the types of digital experiences you might want to create now and in the future.

For financial organizations this might include delivering content to users across multiple devices or channels.

2. What are your business goals?

Can the headless CMS you choose help your business meet its short-term and long-term goals? Are those goals related to digital transformation in the medium-term or immediate efforts to improve the patient experience?

3. What are your performance and integration needs?

As an enterprise business, peak performance is fundamental.

You need to ensure that your headless CMS provides consistent uptime and the types of integrations you will need to include, from your existing systems that will be part of the re-platforming to new tools that you might integrate down the line.

4. What are your internal resource capabilities?

How extensive is your IT department, operations and marketing teams?

The leaders of these departments will likely be part of your decision-making process and help you assess whether your internal teams can make the most of your headless CMS or if you need assistance with the implementation.

The 37 Point Checklist for Fintech Companies Choosing a Headless CMS

Architecture

1.Is the underlying architecture monolithic or microservices-based?

If your healthcare CMS has a monolithic architecture—which you get with an all-in-one suite—it can be more of a hindrance than a help.

With a microservices-based architecture, your tech stack is leaner as it's composed of individual pieces of business functionality that combine to create one system.

2. Is the platform API-first?

APIs are the cornerstones of the modern web. Every application and business relies on them, so your healthcare CMS should be API-first to connect to other software tools easily.

3. Can you embrace composability?

Composability is critical for modern enterprises as it enables organizations to select the best tools for the job and build from the ground up.

With this modular approach to building a software stack, businesses can also swap out pieces as their needs change rather than suffering from vendor lock-in.

4. Is the CMS cloud-based or on-premise?

Enterprise CMSs have been traditionally on-premises that you can manage yourself; this is especially true for CMS platforms in the healthcare industry.

But in the modern age, financial organizations can find better success by opting for a SaaS solution that is hosted in the cloud.

Architecture

5. Does the CMS vendor offer a content delivery network (CDN)?

With a CDN, the network will hold copies of all of the images, videos, documents, and scripts that are loaded by a visitor's web browser.

Having your CDN built into the CMS can help you reduce load times and streamline your content creation.

When it comes to accessing financial information, speed could be a necessity.

6. How flexible is the data structure?

The capability to create data types and relate them to each other is vital for a CMS.

Still, it's more important to be able to do these things well, which is why choosing between a CMS with JSON, XML, or Jamstack structure can help you delineate how your data will relate to your website. In addition, you need to consider how that data will be accessed.

7. Is the platform multi-tenant?

Multi-tenant architecture allows a software application to provide each tenant with a dedicated share of the instance's functionality, including configuration, data, and user management, which works wonders if several people collaborate on your website at the same time.

8. Does your CMS have its own internal site search?

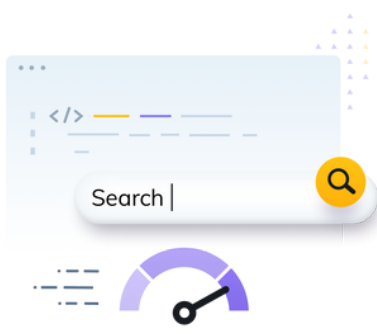Internal site search enables users to search for terms on your site, improving user experience and SEO.

You should find a CMS with the search functionality to make finding things easier.

The 37 Point Checklist for Fintech Companies Choosing a Headless CMS

Budget

1.Will it be too costly to scale in the future?

While an initial budget might not phase your business at the enterprise level, you might need to scale in the future. So you need to determine if your CMS can scale with you and the types of costs you might incur.

2. What are the projected maintenance/license fees for the CMS?

Aside from the technical requirements for your CMS platform, there are also some implementation and maintenance requirements that you should consider.

[Agility CMS Pricing >](#)

Speed and Scalability

1. How easy is the CMS to deploy?

Implementations can be time and resource-draining if you don't have the right platform. Ensure that your team can easily deploy your new headless CMS without going over the budget or project scope.

2. What are your security requirements?

Each company has different regulatory compliance requirements. Some have stricter controls and more comprehensive measures than others, but you have to be sure that your CMS meets the minimum baseline controls.
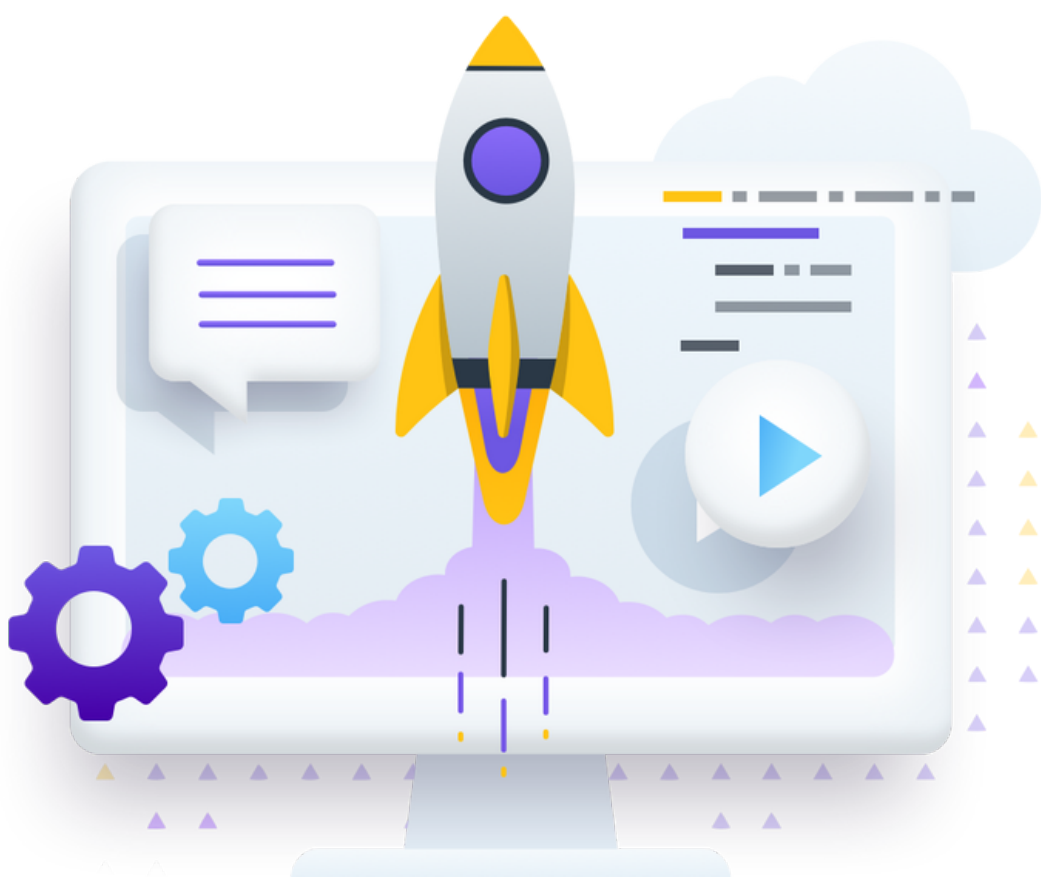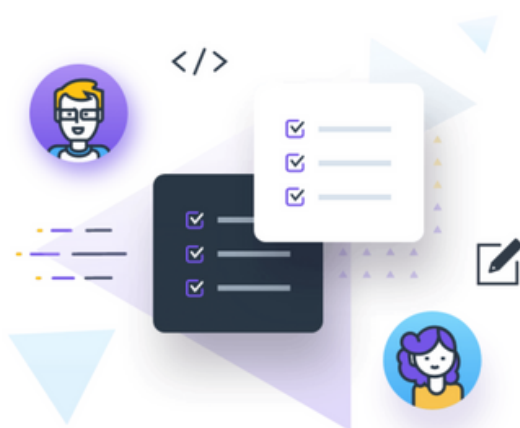
The 37 Point Checklist for Fintech Companies Choosing a Headless CMS

Speed and Scalability

3. Can you start small and scale later?

As the amount of content grows, the problem becomes how to manage it from the creation process to the need to access it later. You need a CMS that can help you scale from the ground up.

4. What time-saving features does it include?

A headless CMS provides features that can help your enterprise business grow, including saving time.

Consider how your CMS will help content managers, authors, and even your developers save time and have the freedom to experiment.

You should consider how much you need features like customizable content workflows, global content search, and task management.
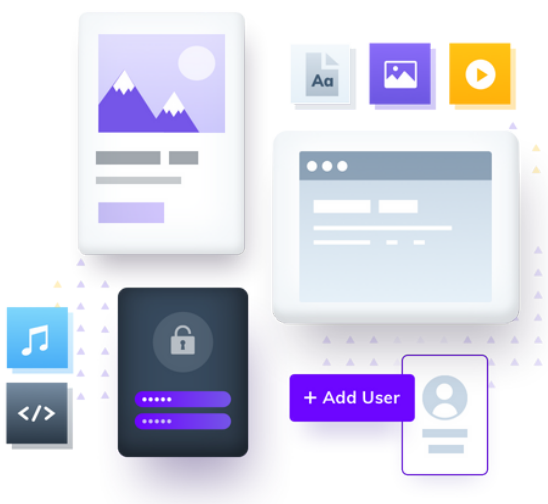
Security and Permissions

1.How granular are the permissions and roles?

In an enterprise business with hundreds of employees, you will need to create a variety of roles and permissions to ensure that only the right people have access.

The more granular your permissions are the better for your company in terms of data protection and website security.

2. Does it have formal security accreditation?

Other than an SSL certificate, there are other security accreditations that your CMS needs to have so you know you're dealing with a serious provider that puts your security at the front and center.

3. Is there a disaster recovery plan?

A disaster recovery plan is applied to the aspects of an organization that depend on a functioning IT infrastructure. This plan helps your company resolve data loss and recover system functionality so that it can perform in the aftermath of an incident.

4. Does it support single sign-on?

Single sign-on provides secure authentication for multiple applications and websites but requires users to log in only once. Single sign-on lets you log in quickly and safely from a trusted device while a third party verifies who you are, a crucial component for an enterprise business.

The 37 Point Checklist for Fintech Companies Choosing a Headless CMS

Content Management

1.Is the content authoring interface marketer-friendly and easy to use, and SEO friendly?

Your chosen headless CMS needs to have a clear interface that makes it easy for marketers to publish content, preview content across devices, create workflows, and manage pages just like they can with a legacy CMS. This should include options to improve your SEO.
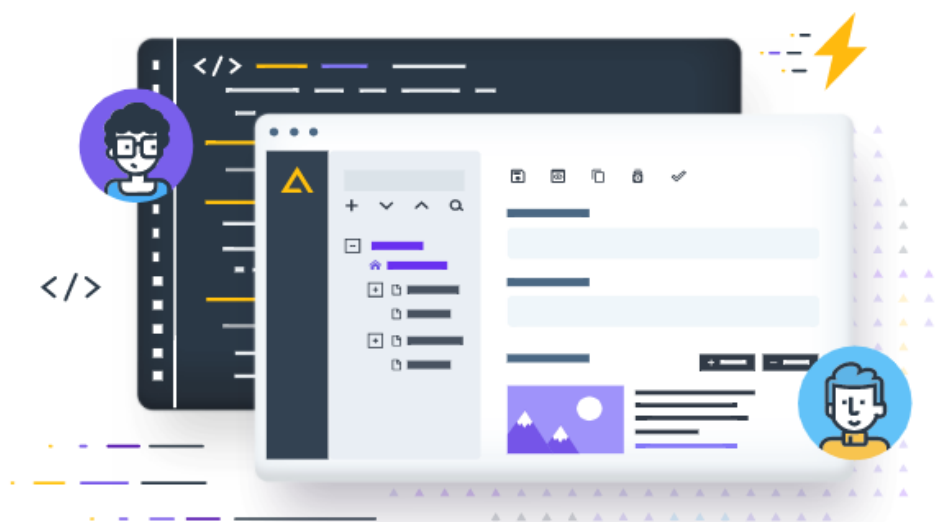
2. Is it easy to preview content?

Knowing how your content will look on a website or other channel before publishing is important for your marketing team. Having the ability to preview content with context is essential to avoid mistakes.

3. Is there a content architecture you can mold your content strategy around?

Some headless CMS vendors provide very little guidance when it comes to how your content should be structured, if at all. Look for a CMS with a content architecture that supports a scalable content strategy.

[Agility CMS Approach to SEO>](#)

Content Management

4. Does the CMS enable non-technical users to create more complex content?

WYSIWYG editors are the best way of producing error-free content quickly using a rich-text editor that helps marketers create content in a no-code environment.

If you plan to produce content at scale, a WYSIWYG editor is a must for your non-technical team members to easily embed videos, tables, widgets and make general content changes without needing developers.

5. Can you easily localize your content?

Translation and localization are two fundamental parts of content marketing.

Your headless CMS needs to be able to help you create localized campaigns that are specifically tailored to different regions and language speakers.

6. Does it offer support for multiple channels?

A headless CMS allows you to deliver content to multiple channels, but you also need flexibility for your developers.

This means flexibility in the frontend technologies developers can use to create different user experiences and personalization to support varied user preferences.

Multisite Deployments >

## APIs and Extensibility

1.Is your CMS extensible with APIs and SDKs?

Extensibility means the capacity of your CMS to handle third-party extensions. The more you can extend the functionality of your CMS the better you can handle various scenarios and improve your CMS' capabilities.

An API-driven CMS provides you with the required backend services and data structure needed to manage your data. It also integrates with any existing systems by making simple API calls to the CMS.
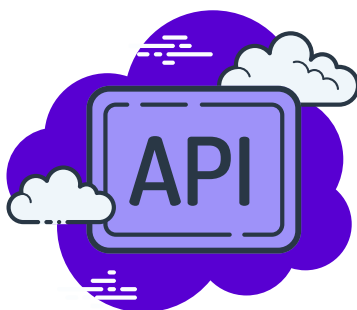
2. Does it offer add-ons or plugins for customization?

Some CMS come with their own add-ons and plugins for you to install and hit the ground running quickly. When choosing a CMS, you need to make sure that these plugins are what you need or that the system enables you to integrate third-party software.
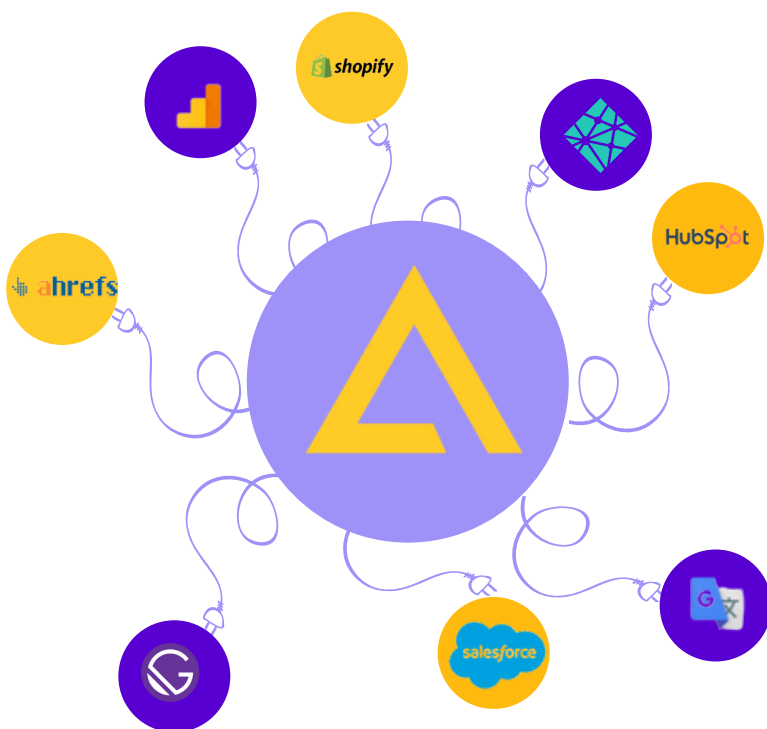
APIs and Extensibility

3. Does your CMS support open standards?

Open standards are freely accessible programming languages and processes that can be adopted, implemented, and extended by developers royalty-free.

Not all CMSs support this, so if being open source matters to you, you should identify the platforms built in this way.

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

Many platforms have a list of partners and other vendors that work directly with them, guaranteeing better performance and seamless integration.

Check your vendor's partners and see if what they offer is also in sync with your company's goals.

5. Does it come with tools or methods for migrating thousands of pages of content?

Migration is always a challenge when re-platforming, more so if you run an enterprise business with thousands of pages.

Determine if your CMS can help you migrate your content or you need third-party software to assist.

API-first CMS >

The 37 Point Checklist for Fintech Companies Choosing a Headless CMS

Additional Features & Support

1.Does it provide insights and monitoring into how customers interact with the content?

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

Dashboards show your website's health and enable you to take action based on the KPIs you're monitoring.

2. Does the CMS offer internal search features?

Having an internal search feature in your website really eases navigation. It helps visitors find the content they're looking for faster and it also improves your website SEO and increases your visitors' web session time.

3. Does the vendor offer 24/7 live support?

Constant support is a must if you're just starting with a new CMS. From onboarding right through to when you're a happy customer needing support for something that does work.

4. Is it backed up with appropriate technical documentation and user guides and training?

Your team needs proper support to get the maximum benefit from your CMS. User guides, documentation, and training provide these capabilities, and you should assess what your next CMS has to offer.

Scotiabank: Delivering Exceptional and Secure Content Experience

Scotiabank is a Canadian multinational banking and financial services company with the highest requirements for security and reliability. As one of Canada's Big Five banks, and the third-largest Canadian bank by deposits and market capitalization, Scotiabank was looking for a perfect partner for fast and reliable content management.

Agility CMS allows Scotiabank to maintain consistent content infrastructure and high-security performance across numerous international locations and lines of business.

Read More

Innovating Omnichannel Customer Experience for SCENE Rewards Program

In 2016, SCENE was in the process of a major rebrand and wanted to launch a new website. They were also hoping to find a platform that was flexible and that allowed them to increase their speed to market content and updates.

With more than eight million members across Canada, SCENE was looking for an innovative omnichannel experience to keep members engaged. Agility has given SCENE full power and control over its content, enabling them to easily manage their digital channels and provide their customers with an outstanding online experience.

Read More
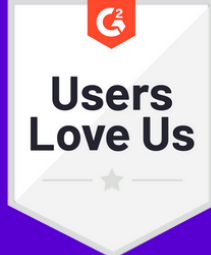
△ agility

Agility CMS is a Content Management System (CMS) with built-in Hybrid components for better Editor Experience.

The platform adopts all the aspect of Headless CMS that makes an omnichannel approach easy, with the understanding that Page Management is of utmost importance in any website project.

Agility is proprietary CMS with full Support and Security that gives creative freedom to both Developers and Marketers and eliminates friction between the teams.

Developers have full freedom to use any coding language and any framework and code and define custom Page Templates and Module Definitions.

These pre-defined custom Modules and Page Templates are available to the Marketing Teams to effortlessly create a variety of pages to meet their fast-changing needs and market requirements.

Agility CMS believes in Content First Approach and heavily invests in helping clients to build future-proof Content Architecture.

Book a Demo >
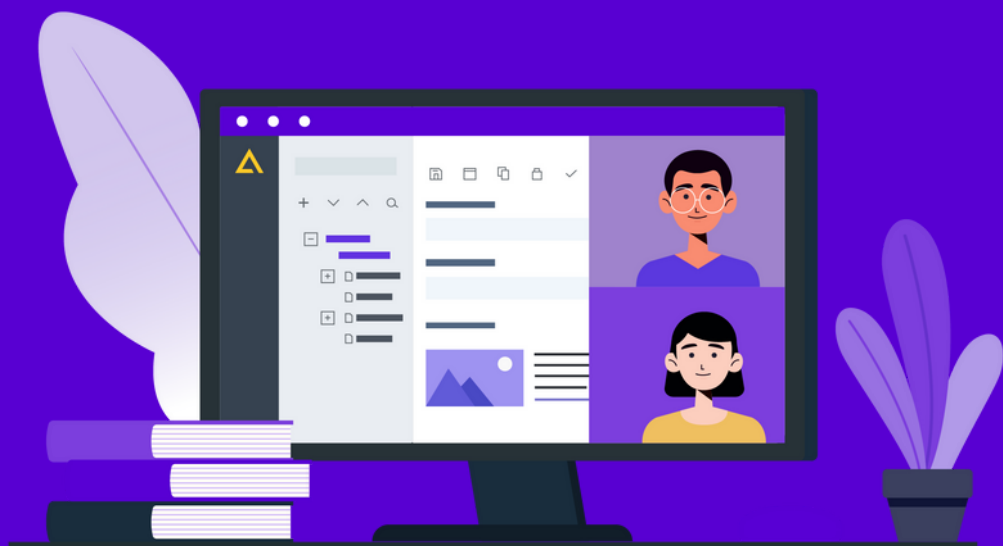
Agility CMS Differentiators

- It is a modern Enterprise-grade Composable DXP with flexible Headless approach in its heart.

- Unlike many other Headless CMS, Agility CMS also offers tools for Enterprise teams to effortlessly manage content delivery to websites and apps like Page Management, Sitemaps, Content Modelling.

- With Page Management built-in, developers don't have to build an entirely new way to manage pages and routing. At the same time, marketers can easily edit content across a variety of channels without any coding experience.

- Agility CMS provides enterprise-level security and support, it is SOC2 compliant.

- Agility CMS is Jamstack friendly and allows to start quickly with your favorite frameworks and deploy with a few clicks.

Details

License Model: Agility CMS is a multi-tenant SaaS platform, and hosted on MicrosoftAzure Cloud

Price: Starts with FREE Developer Edition. Paid plans have extensive TRIAL. Learn more.

Key Components: Page Management, Content Relationships, Content Modelling, POS, Search, User Generated Content, Personalization, Digital Asset Management. Unlimited content models, Locales, API calls,

Upgrades: Automatic, monthly platform updates.

agility