AWSM Workflow (creation to cleanup)

Friday, June 23, 2017 9:24 AM

Migration 2.0 Overall Build Process (AWSM)

Tuesday, October 04, 2016 5:08 PM

1. Migration form for reference if needed: http://publc01apwxa.rjf.com/forms/web_marketing_manager/New_website_selection_form.htm?type=ps&group=group1
2. Assign yourself to a card in the 'Ready to Build/Form Received' lane on the Migrations Trello Board
    a. Card are automatically added to Trello, some formatting is required to match our build standards
        i. Card Name: Site Name
        ii. SC8 Link: (IE: SC8: https://scrcm01apwpd.rjf.com/rj-th1-blue
        iii. Migration Site Link: (Formats): (This url needs to be the actual address of the site, and should not include any file names)
            1) SC7:
            2) AWSM:
            3) Custom:
        iv. Custom Domain links: (Formats):
            1) Custom:
        v. Labels:
            1) Labels should be added based on the content of the site. These labels are used to alert the rest of the team as to what is going on with the site (custom domain, domain masking, domain resolving, custom content, missing bio image, etc)
                a) How To Identify sites:
                    i) **Custom Domain:** is the url something other than raymondjames.com/whatever? Custom domain
                    ii) **Domain Masking**: When you load the site, do you see a custom domain, that does not change no matter what page you go to? Domain Masking (which will be a custom domain as well)
                    iii) **Domain Resolving**: Is the Affiliation IAD? Is the url for the site something.com that changes as you browse through the site, but always has the custom domain at the beginning? Domain Resolving. By default most, if not all IAD sites will have Domain Resolving
    b. Comments should be entered on the card, and @ mentions used to alert other team members when there is specific information ne eded from them
3. Login to Sitecore 8, and navigate to the website management area. Refer to the 'BestPractice' website build documentation loc ated here, follow along for your site build.
4. As you begin gathering resources for this site, save all files used in This Location
    a. You may need to log in to https://kenwood.rjf.com/AdvisorSites/SystemManager/SiteSearch.aspx to identify what a site is, or where it is. You can look up a site using:
        i. Branch Number
        ii. Site Owner Last name
        iii. Sitename
        iv. Delegate last name
        v. Additional Fields (compliance number, publish date, etc)
    b. The name of the folder should be the exact name of your site
    c. Logo source files should be saved
    d. All original pictures should be stored in a sub folder under your site folder named "Originals"
    e. All images resized for site use MUST be stored outside of this "Originals" folder
    f. Review the site and identify what assets are needed. Things to consider:
        i. Bio Photos > are they the correct size to match the chosen layout?
            1) If not, resize them and save them
            2) Check \\penguin\AdvisorSites$\AdvisorSites\AdvisorWebSites\PreviewSites to find your site's AWSM folder to see if there are any higher quality pictures
        ii. Custom photos > identify any files that are not part of the template
        iii. Custom pages and content > make sure you know what is custom and plan to bring that material over.
            1) Example of custom pages: Events, In the Community, In the News, Philosophy Pages, etc.
        iv. If you do not have bio photos or bio copy, or the bio photos you do have are too small mark this on Trello and continue building your site. Beth or Jessica will reach out for missing assets. This allows us to continue building without having to stop for an email. If they get any additional assets they will be added to the card in Trello.
5. Once site is built, it must go through quality control, follow the QC checklist.
6. Once your site passes QC, it must be sent to compliance for approval. Those steps are also on the QC checklist
7. Once compliance approved, your site is ready to be published. Follow the site publishing checklist.

Proxy List (AWSM)

Wednesday, October 19, 2016 9:54 AM

If a site exists on the proxy list, the url will try to load the legacy version, therefore if we have a sitenamed: raymondjames.com/Whatever and use that same name for SC8, then it will have to be removed from the proxy list.

Jeremy is creating a tool to help this process.

Subject	**RJ.com proxy list**
From	Kevin Barnitz
To	Don Rua; Jay Bravo; Steve Shawn; Jamie McCaw; Whitney Bell - Skybridge; Jeremy Zoerman; Brennien Coker; Evan Tanaka; Jose Azua; David Greer; Brandon Halm; Anthony Arceri; Olivier Bizimungu; Jeffrey Zimmerman; Veronica Pena-Carrasco; Aaron Weiss; Brian Hecimovich; James Hood - Veredus; David Faith
Sent	Monday, October 24, 2016 11:17 AM
Attachments	proxylist_10-24

Attached is the most up-to-date proxy list that I mentioned on Friday. When attempting to access these URLs on the new raymondjames.com, the proxy will pull content from the legacy Public server, rather than the new Sitecore server.

If you see any items that should or shouldn't be on this list, please let me know.

Build Processes (AWSM)

Thursday, October 06, 2016 9:23 AM

1. Create Site in Sitecore:
    a. Sitename: Awsm Sitename (all lower case)
        i. If sitename is the same as Sitecore8 sitename we will have to submit a service now ticket to have the AWSM name removed from the proxy list. Site names should *always* match the site you are migrating.
            1) If they've requested a custom domain, contact Aaron Weiss.
    b. Template:

Form Selection	SC8 Equivalent
rj-th1-blue	Template 1 - Blue
rj-th1-burgundy	Template 1 - Burgundy
rj-th1-greygold	Template 1 - Grey/Gold
rj-th2-blue	Template 2 - Blue
rj-th2-burgundy	Template 2 - Burgundy
rj-th2-greygold	Template 2 - Grey/Gold
rj-th3-blue	Template 3 - Blue
rj-th3-burgundy	Template 3 - Burgundy
rj-th3-greygold	Template 3 - Grey/Gold

    c. Sitemap: RJ Blended
    d. Domain: www.raymondjames.com
    e. Site Owner: Site Owner (primary)
        i. Verify the subsidiary from the information pulled from CSS. This information may not match what is on the card. The information from SC8 pulls from registrations, it should be correct
    f. Team Members: add any other people from the Site (the site owner should have checked: bio, delegate and workflow emails)
        i. Add any additional team members from the card
    g. Address information: check 'Display' and 'Map' boxes
        i. Update Label of address:
            1) DBA or Primary Advisor Name
            2) Check each phone number to display
    h. Site settings:
        i. Group name: type if have a DBA, three lines max (check 'Display group name' box)
            1) RJA: include "Of Raymond James"
            2) Default to whatever title the site has on it (this could be a primary advisor name, or a location)
            3) If no DBA is listed on the form, or site, use primary advisor
        ii. Pipeline: AWSM Migration, SC7 Migration, New or Transition.
            1) Make sure to select which pipeline the site belongs to. A dropdown has been added to the Site Settings area of the Website Management panel and it's as simple as selecting one of the available options.
        iii. Color Theme: Selection based on Form
        iv. Image Theme: Selection based on Form
        v. Upload Group logo (if available): include Alt/Description, should be approved DBA or name of advisor
            a. Check workamajig (use webadmin account, information here) for the source files
                a) First look up using Branch number:
                    i) Use BR plus the numbers of the branch number: If the branch number contains numbers at the end of it, like 01, 02, 03 take those off for your search in workamajig
                b) If you cannot find the logo via Branch number, look up site name, variations of the site name, partial site names, last name of the advisor, etc.
            b. Usually you can just use the png that's in the zip file, but some cases will require you to load the eps and make a new higher quality png file
                a) This will require you to load the file in Illustrator
                    i) File > Export As > PNG
                    ii) PNG Options: Resolution High (300 ppi), Anti Aliasing Type Optimized (Hinted)
    i. SAVE AND CONTINUE
2. Add Bios and Pictures to Team Members
    a. Bio Tile Component is already on the About Us Page, ensure that you have selected all team members within component.
        i. If photo is smaller than 206x248 <u>**DO NOT**</u> use it.
            a. If not, resize them and save them
            b. Check [\\penguin\AdvisorSites$\AdvisorSites\AdvisorWebSites\PreviewSites](\\penguin\AdvisorSites$\AdvisorSites\AdvisorWebSites\PreviewSites) to find your site's AWSM folder to see if there are any higher quality pictures
            c. Bio picture size: 206x248
            d. Alt/Description: Name of Advisor
    b. Use standard html formatting for Bio
        i. p, strong, em, ul, li
        ii. Custom disclaimer, add it as a component, which will allow it to be used in multiple places
        iii. Add team members to bio tile
    c. For Home Office people:
        i. How to identify Home Office people:
            1) Strange titles (with consultant, etc)
            2) Branch ID of 5 numbers, etc.
        ii. Create a custom page:
            1) Custom Banner (heading, image)
            2) Rich Text Component method
                a) Manually add Home Office bio to this page, uncheck bio page from the main page and remove them from the bio tile
                b) Suggested HTML:
                    i) Use "Fake Bio" from this location
            3) secondary Bio Tile method
                a) Create a new bio tile:
                    i) Name: Our Partners
                    ii) Select the people who should appear on this page

iii) Ensure they are not set to appear in the other bio tile, and that they do not have bio turned on for them
iv) Add this new bio tile to your custom page. This allow you to leverage their bio item but does not let you click on them to see a bio page, as the site was never intended to have two bio tiles, this one would display title, picture and the first designation

3. Homepage:
    a. Banner
        i. Create Custom Banner Component for home page
            1) Select Heading and content, leave image selection blank UNLESS they ask for a specific custom image different from the default theme
    b. Correct Niche Tiles - Select up to the first 8 client groups they select from the form
    c. Correct Category Tiles - all category tiles are set to default pages. These options are not presented to the advisor on the form, so these should be left to the default selection of:
        i. *Expertise knowledgably applied* links to > About Us page
        ii. *Resources vital to success* links to > Services/Services
        iii. *Commitment worth mentioning* links to > About Raymond James
            1) If they request to have the About Raymond James page removed, then make a custom category tile collection, select "Professional Expertise, Breadth of Services_Blended and Accolades", make sure to change the default category tile on the home page to the new one you just made.
    d. Team Photo component
        i. If AWSM site does not contain a team image, you may skip this step
4. Remove optional pages
    a. Team recognition - If they have any content on your AWSM site about specific awards any team member has gotten, please use that content here. If they only include this information on their specific bio page, just keep it on their bio page and do not duplicate it on the 'Team Recognition' page
    b. In the community - migrate content if they have this page on their AWSM site
5. Remove additional pages as needed
    a. Services use: Selection based on Form
    b. Client Groups: Selection based on Form
6. Once site is built, it'll go through:
    a. Site QC Checklist
    b. Site Publishing Checklist

AWSM Mapping Guide: Services Page

Wednesday, October 05, 2016 4:11 PM

These Services pages are in the AWSM site and are considered canned library content.

AWSM Name	Description	SC8 Equivalent
Asset Allocation	Asset allocation versus diversification - what's the difference?	Portfolio Management
Asset Management	Discover the benefits of professional asset management.	Portfolio Management, Financial Planning
Estate Planning	Trust services for the preservation of assets and the fulfillment of wishes.	Estate Planning, Charitable Giving & Trust Services
Financial Planning	Your financial future is important. Don't trust it to just anyone.	Financial Planning
Mutual Funds	Your purchasing power at work.	Investment Solutions
Retirement Planning	In today's rapidly changing world, retirement planning has never been more challenging. Working with a financial advisor to map a comprehensive, thoughtful retirement strategy and keep it on track is essential to your future well-being.	Retirement Planning
Stocks	How do stocks fit into my financial plan?	Investment Solutions
College Planning	What will it take to deliver the dream?	Education Planning
Bonds	Are bonds right for you?	Fixed Income Solutions
Identity Theft	The more you know about identity theft, the better you can protect yourself.	
401(k)	What to expect from your 401(k) advisor.	Retirement Planning
Insurance and Annuities	Preparing for the unexpected may start with quality insurance alternatives.	Risk Management, Investment Solutions
Stock Options	Strengthen your portfolio without stretching your finances.	Investment Solutions
Freedom Account	Managed accounts with the flexibility to meet your investment goals.	
Investment Banking	Serving the capital and advisory needs of today's middle-market companies.	Investment Banking
Tax Planning	Prepare for taxes all year round with this handy reference guide.	
Executive Solutions	While you are busy managing your company’s future, who is taking care of yours?	Corporate Executives
Cash Management	Understand the potential and importance cash plays in your overall financial strategy.	Banking and Lending
Goal Planning	Together, we can take financial planning to new levels with tools to help you plan and pursue your short- and long-term goals.	Financial Planning
Lending Solutions	To develop a financial plan that will effectively meet both your long- and short-term goals, it is important to consider how you access cash for specific life events and events that affect your business.	Banking and Lending

AWSM Page: Our Advisory Process

Friday, April 28, 2017 8:43 AM

Our Advisory Process (sometimes called Our Process)
Canned Content: http://www.raymondjames.com/branches/library/ourprocess.htm

An Advisor could have customized this page with additional new content, or new images. The our Approach page in SC8 SHOULD cover most of this content.

This is a judgement call on the admin.

AWSM Page: New and Events

Monday, May 15, 2017 7:52 AM

Create a new page within SC8 for this. Any date that is older than 2 years should not be used.

AWSM Page: In Our Community

Monday, May 15, 2017 7:52 AM

This page will map to the "In the Community" page in SC8

"Why Choose a CFP" content

Thursday, April 13, 2017 2:34 PM

Do not migrate this content unless an advisor specifically asks for it

Checklist - Site QC

Thursday, October 13, 2016 12:24 PM

	PROCESS MANAGEMENT
	☐ The sites' Trello card should be in the 'Ready to QC' lane
	WEBSITE MANAGEMENT - WEBSITE SETUP
	☐ Site type - advisor ☐ Layout - Selection from Form ☐ Color - Selection from Form ☐ Site map - RJ Blended ☐ Domain - Selection from Form ☐ Site name - matches selection form/previous site name exactly (all lowercase)
	WEBSITE MANAGEMENT - SITE INFORMATION
	☐ Website owner - FA of branch or team, see form if unsure ☐ Person ID - should pull from CSS ☐ FA Number - matches form, automatically pulls from CSS, if Present ☐ Branch - automatically pulls from CSS
	WEBSITE MANAGEMENT - TEAM INFORMATION
	☐ Display order matches old site ☐ Bio page box checked if they are to have a bio page ☐ Delegate checked - Selection from Form
	WEBSITE MANAGEMENT - ADDRESS INFORMATION
	☐ Pulls from CSS ☐ Display check box is checked ☐ Map checked box is checked
	WEBSITE MANAGEMENT - SITE SETTINGS
	☐ Group name - if team has DBA (Only if not using custom logo) ☐ Display group name - checked if team has a DBA (Only if not using custom logo) ☐ Color theme - Selection from Form ☐ Main contact - site owner ☐ Image theme - Selection from Form ☐ Address Label set to DBA ☐ Phone Numbers checked to be displayed in footer
	WEBSITE MANAGEMENT - GROUP SOCIAL MEDIA
	☐ Add social media links if team has them on their current site (*Do not add YouTube, this may change*)
	WEBSITE MANAGEMENT - GROUP LOGO
	☐ Group logo added if they have a custom logo ☐ Logo size for theme 1 and 3: 285x135 (max) ☐ Logo size for Theme 2: 295x90 (max)
	VISUAL QA INSPECTION
	☐ RJ Logo displayed, DBA displayed if they have a DBA. If custom logo: appropriate size, quality, spacing, buffer ☐ Banner selection matches form selection ☐ Client niches match form selection (use first 8 client types) ☐ Category tiles link to pages they have on their site ☐ Media carousel has content and links function properly ☐ Address and standard disclaimers are in the footer - pulls from CSS ☐ Address Label: DBA ☐ Phone numbers and labels in footer match current site ☐ BrokerCheck bar is displayed across footer
	OUR CLIENTS PAGES - OPEN SITE URL
	☐ Clients pages - Selection from Form (*delete any extras*)
	SERVICES PAGES - OPEN SITE URL
	☐ Services pages - Selection from Form (*delete any extras*)
	ABOUT US - OPEN SITE URL
	☐ Bio Tile has been added and images are correct dimensions (206x248) ☐ Bio Tile images are clickable and go to person's bio page ☐ CFP Disclosure (only if there is a CFP on the site)
	BIO PAGES - OPEN SITE URL
	☐ Name, corporate title, job title and designations are accurate (*if applicable, not all will have all three*)

	☐ Bio copy matches exactly to their old site ☐ Social media icons are present (if they have them) and link properly ☐ Any custom disclosures have been added, i.e. CFP, etc.
	OUR APPROACH - OPEN SITE URL
	☐ Selection from Form ☐ If the form selection is "OurApproach_Expertise for the big picture and finer details" the component to use is "OurApproach_Blended" ☐ Components to check: Small Banner, Intro Text ☐ The form will have the name of the data source item, the selection should match the form on the above components
	WHAT MAKES US DIFFERENT - OPEN SITE URL
	☐ Selection from Form ☐ Components to check: Small Banner, Intro Text, Rich Text Component ☐ The form will have the name of the data source item, the selection should match the form on the above components
	ABOUT RAYMOND JAMES - OPEN SITE URL
	☐ Selection from Form ☐ Components to check: Small Banner, Intro Text, Rich Text Component ☐ The form will have the name of the data source item, the selection should match the form on the above components
	MIGRATION REVIEW - OPEN OLD SITE URL
	☐ Check all custom pages for responsiveness for tablet/phone sizes ☐ Did site have particular, specific, content carried forward?
	PROCESS MANAGEMENT
	☐ Add a checklist to the Trello card with all corrections that need to be made. ☐ Move your sites' Trello card from the 'Ready to QC' lane and into the 'Has Been QC'ed' lane ☐ Site builder will make changes and move card into the 'Ready for Compliance' lane

Checklist - Submit to Compliance

Tuesday, December 27, 2016 11:33 AM

	PROCESS MANAGEMENT
	☐ From the Content Editor Lock and Edit the following items ○ SITENAME ○ Bios ○ custom pages ○ any standard page with custom verbiage ☐ Go to the workbox, locate your site from the site dropdown, wait for it to reload and show your site, hit submit to compliance (All) ☐ Move your sites' Trello card from the 'Ready for Compliance' swim lane and into the 'Compliance Review' swim lane

Checklist - Pre Proxy Publishing Steps (AWSM)

Thursday, March 03, 2016 1:02 PM

PROCESS MANAGEMENT

- [ ] Move your sites' Trello card from the 'Ready to Publish' swim lane and into the 'Pre Proxy Publishing' swim lane

WORKBOX

- [ ] Filter list by your site name, your site items will all be in pending publish
    - Select your site items then click 'Publish (selected)'
- [ ] If there are any items in draft, ensure they are pushed all the way through the queue
    - Double-check the comments to see if items in draft are things that didn't get compliance approval (*when compliance rejects an item, it goes from their queue and back to your drafts*)

ADD BILLING INFORMATION TO SITE

- [ ] Monthly recurring charge for maintenance package
    - [ ] Set purchase date to current date
- [ ] Add custom domain (only added if they are using a custom domain)
    - [ ] Select custom domain
    - [ ] Bill to same location as monthly recurring charge
    - [ ] Uses notes/comments section in SC8 to note the domain
- [ ] Save changes

CREATE GOOGLE ANALYTICS PROPERTY

- [ ] For existing sites (all migrations should have been migrated from something!)
    - [ ] If they already have a Google Analytics account, use that UA Code on the new site. You may need to change the settings in Google Analytics to poll the new site (for SC7 sites especially)
    - [ ] If they do not already have a Google Analytics Account then you will need to create one
        - [ ] Create Google Analytics property for site (login to web service analytics account) (Login Information)
        - [ ] The accounts should be created under the relevant affiliation:

Affiliation	Google Account
RJFS (ICD/IMD)	ICD
RJA	RJA
FID	FID
IAD/CORR	IAD/CORR

- [ ] Go to your sites SITENAME item, put the UA code in the Google Analytics Tracking ID area (NOTE: ONLY use the UA-XXXXXXX code.)
    - [ ] Do NOT add it to the Google Tag Manager section.
- [ ] Note: If you're adding a CORR site, make sure that you're using the CUSTOM URL and not the raymondjames.com url. You will also have to add this CUSTOM URL onto the proxy too.

WEBSITE MANAGEMENT - WEBSITE STATUS

- [ ] Update status to Live, save changes
    - When you click save, in the options box that appears, click 'Save and Publish'
    - You may need to do a second publish from the content editor, just in case something hasn't published fully from the first publish, this sometimes happens to people items.

VISUAL QA INSPECTION INITIAL

- [ ] Verify that the site appears correctly on the CD server: https://scrcd01apwpd.rjf.com/meklerwealth (change meklerwealth to your site)
- [ ] Verify location information appears correct (If not, republish location item.)
- [ ] Verify Bio pages show up in the drop down menu (If not, republish people item.)
- [ ] Verify bio details appear correctly within template style.
    - [ ] There should be no odd font weights, or different font weights, ideally there should be no inline styles unless absolutely required to make the bio appear presentable.
- [ ] The site should be verified as appearing on the CD server, if it does not appear then do not add it to the proxy server. Raise a flag on the card and alert someone.

PROXY/REDIRECT LIST

- [ ] If the current sites URL is being redirected to www.raymondjames.com it was probably because the site WAS decommissioned.
    - [ ] Add the site to the redirects sheet:
    - [ ] From: current site url
    - [ ] To: https://www.raymondjames.com
    - [ ] Remove
- [ ] AWSM and Custom sites should be added to the proxy spreadsheet, with the 2nd column set to Remove, see information on Proxies
    - [ ] Add site information to spreadsheet for QA proxy testing
        - [ ] Be sure to add the word "remove" to the 2nd column

Checklist - Post Publishing (AWSM)

Thursday, February 09, 2017 8:27 AM

SITE VERIFICATION (THE SITE MUST BE VERIFIED AS LIVE BEFORE YOU CONTINUE)

- [ ] In the Pre-Proxy Publishing lane in Trello:
    - [ ] Open each card and Verify all URL's for the live site work
        - [ ] Custom Domains
            - [ ] Verify Custom Domain redirects properly (Domain masking turned off, etc)
                - [ ] If Custom Domains are not redirecting properly log in to Enom and look up the site
                    - [ ] If found, click host records
                        - [ ] record type: URL redirect
                        - [ ] Verify correct address
                        - [ ] If domain masking WAS on for the site change it from URL Frame to URL Redirect
- [ ] If the Site still shows the AWSM site, double check on a fresh screen, incognito mode, then check your phone, or have another team member verify. If AWSM site still appears, check the redirects and proxies to verify that it was submitted
- [ ] After the site has been verified live, move the card into the Post Publishing Cleanup lane then move on to the next steps. Every card must be verified live before any other steps can be performed for that specific card.

CANCEL SITE IN AWSM PLATFORM

- [ ] Access the AWSM dashboard at this link: https://kenwood.rjf.com/AdvisorSites/SystemManager/SiteSearch.aspx
    - Login & Password: same as your RJ info
- [ ] In the 'Site Name' field, search site by site name
- [ ] In the results that fill below that, ensure the 'Web Site Name' matches your search, then click the 'Info'
- [ ] Go to the 'Change Status' field and from the drop-down list, select 'Cancelled'
- [ ] Save status

CANCEL JOBS AND RETAINERS IN WORKAMAJIG (Only for AWSM Sites)

- [ ] Access Workamajig at this link: http://workamajig.rjf.com/ (Login Information)
- [ ] Click Retainers from top left options: (There could be multiple retainers for a given site, double check all and make sure they are all inactive)
    - [ ] Search by site name
    - [ ] Uncheck the active box
    - [ ] save changes
- [ ] Go to Projects (search by site name)
    - [ ] Open projects for 'website setup,' 'website maintenance,' and 'website subscriptions'
        - [ ] For each project:
            - [ ] go to SETUP > Status
                - [ ] update Project Status to 'Completed - Billed and Closed-COMP-BILLED'
                - [ ] update Billing Status to 'Billed and Closed'
            - [ ] Click Accounting and click Closed box
    - [ ] Save changes (top left)
- [ ] Error Handling: Any projects that prompt you with "unbilled time" or other errors should be sent to Jessica Custer:
    - [ ] Subject: Billing Issues
    - [ ] Body Format:
        - [ ] Project Number

CSS Updates

- [ ] Update the CSS website address field for all people on the site, following CSS Updates
    - [ ] If a person has their own site listed in the Online Address field you can leave this

PROCESS MANAGEMENT

- [ ] Move your sites' Trello card into the 'Site Migration Completed' swim lane

Migration Schedule (AWSM)

Wednesday, October 26, 2016 7:50 AM

Subject	**Website Migration - Rough Timeline**
From	Jennifer Carpenter
To	Beth Burchfield; Jessica Custer; Aaron Weiss; Anthony Arceri; Jeffrey Zimmerman; James Hood - Veredus; Whitney Bell - Skybridge; Jamie McCaw; Melissa Campbell; Caroline Schneider 53880; Lauren Bryant; Kate Hall; Alex Bogovic; Kristina Dressander; Lisa Dahlquist; Melanie Yancey
Cc	Dominic Cador; Olivier Bizimungu; Terri Crolic; Debbie Jones Hardwick; Maggie Kokemuller; Grainne O'Rourke
Sent	Friday, October 21, 2016 6:20 PM

Hi!

As you know, we are *just about* ready to resume site migrations. We wanted to give you some high level guidance on what to expect in case you receive inquiries.

Full credit to Dominic for masterminding this game plan and overseeing the execution of it. ☺

Important Notes:

- Sites will be built on a first-come, first-served basis, so it's to the advisor's benefit to complete the form and provide additional resources (logo, headshot, etc.) as soon as possible after initial form delivery.
- The website options and customizations available are more limited now than they will be in the coming months. This is a new product and we will be continuously adding new functionalities, capabilities and content options.
- We will be focused solely on migrating AWSM sites to Sitecore 8 first. Then we will work towards migrating the Sitecore 7 sites to Sitecore 8. While we will be able to migrate a very small number of Sitecore 7 and simple custom sites to Sitecore 8 based on extenuating circumstances or valid prioritization concerns, they will need to agree to limited to no upfront customizations.
- If you have an advisor with a Sitecore 7 (Web Marketing Manager) site who is concerned about why they're not being prioritized, we have separate talking points to address their concerns. We'll be happy to share those as needed.

Rough Schedule

*This is for **internal purposes only**.*
We will be communicating with the FAs directly, but if you have an inquiring advisor, we'd suggest giving broad timelines (ex: 'mid-November' instead of 'week of November 14').

Initial Form Delivery	Form Due Date	Build Timeframe	Group
Week of Oct. 31	November 4	11/7 – 12/2	Beta / Priority
Week of Nov. 14	December 2	12/5 – 12/30	Group 1 Chairman Leaders Council Presidents
Week of Dec. 12	December 30	1/3 – 2/24	Group 2 Executive Leaders Club Achievers
Week of Feb. 6	February 24	2/27 – 3/31	Group 3 Gold Silver
Week of March 13	March 31	4/3 – 4/28	Group 4 Bronze
Week of April 10	April 28	5/1 – 6/2	Group 5 Basic

As always, please let us know if you have any questions or concerns.

JENNIFER CARPENTER
Manager, Advisor Products

Raymond James Marketing
T 727.567.5985 // F 866.597.3988
880 Carillon Parkway, St. Petersburg, FL 33716

RAYMOND JAMES

Thu 1/5/2017 6:52 PM

Hi team,

As mentioned in the meeting earlier, here is a brief timeline estimate of the migration rollout groups. Let me know if you had any questions. Thanks!

Group	Build
Beta ~ 50	11/14 – 12/15
Group 1 – 159 ○ Chairman – 36 ○ Leaders Council – 56 ○ Presidents Club – 68	1/5 – 1/27
Group 2 – 331 ○ Executive Council – 200 ○ Leaders Club – 125 ○ Achievers Club – 6	1/23 – 2/24
Group 3 – 365 ○ Gold – 29 ○ Silver – 336	2/21 – 3/31
Group 4 (Bronze) – 344	4/3 – 4/28
Group 5 (Basic) – 531	5/1 – 6/2

DOMINIC CADOR
Senior Product Analyst

Raymond James Marketing
T 727.567.5648 // F 866.597.3988
880 Carillon Parkway, St. Petersburg, FL 33716

RAYMOND JAMES

Don't Migrate

Wednesday, February 03, 2016 10:37 AM

Fiduciary newsletter and what to expect from 401(k) advisor

!! DO NOT MIGRATE THESE HOMEPAGE TOPICS FROM AN AWSM SITE TO A SITECORE SITE, REPLACE WITH UPDATED CONTENT

Default Home Page title: Mission Statement

Introduction options:

Personalized Financial Strategy
As independent professional advisors, we can offer you a personalized financial strategy, not a generic investment program. Your individual portfolio will be based on your unique situation, your attitudes, preferences and goals. It will be designed to account for change, both in the market and in your circumstances, so that it can work with you and for you at every stage of your life.
Our approach to investing is straightforward: we focus on becoming your partner in building the future you desire. As we work together, our advisors will thoroughly explain the investment strategies recommended, so that you'll be fully comfortable with all aspects of your investment program. Every decision we make will be focused on achieving the results you want. Our mission is to help our clients achieve financial independence through professional advice, sound risk management, quality investment products, and personal, efficient service.

Knowledge and Expertise
As financial advisors, our mission is to provide clients with the knowledge and expertise they need to make educated financial decisions. In order to accomplish this, we combine our experience in the financial services industry with quality investment alternatives and the latest information and technology available.
We strive to present information in a straightforward, understandable manner so that together with our clients, we can determine the most appropriate options available for their portfolios. We constantly consider changes in both the marketplace and in our clients' needs, making necessary adjustments to help them realize their financial goals.

Quality Planning and Thoughtful Advice
Recognizing the importance of well-informed investors, we make every effort to educate all clients about the complexities of investing, while encouraging reasonable expectations of investment results.
We are dedicated to the success of our clients through quality planning and thoughtful advice. We assist clients in mapping action plans designed so they may reach their financial goals. We focus on each client's complete financial picture, from planning for retirement to passing assets on to heirs.