Long-Tail Content Migration Proposal

Capital Group of Companies

October 31, 2019

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Agenda

- Executive Summary
- Infosys Approach
- Scope and Assumptions
- Team Structure, Roles and their Responsibilities
- Commercials
- Appendix (Case Studies)

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1 Executive Summary

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Executive Summary

CG Objectives

CG is migrating their existing websites to new Touch UI platform

There is a **high volume of content** (~3000 pages) to migrate to this new platform and CG would like to take this opportunity to **ensure only relevant and valuable content is migrated.**

CG wants **to improve maturity of Content Management and Governance** for the creation, delivery, and governance of useful, usable content.

As a part of this initiative, **CG is looking for a partner** to lead and participate in migration of content and deployment of Content Strategy.

Infosys Understanding

We understand the complexity of Content Migration, Management and Governance challenges faced by Capital Group:

- High volume of pages to be migrated
- Lack of governance on usage of NextGen templates and components for pages resulting in multiple versions
- There is an opportunity to move content from Java Stack pages to AEM to give more control to business for content changes
- There is an opportunity to automate content for projects like yearend.
- There is also an opportunity to take advantage of the migration to ensure compliance with Accessibility requirements

Infosys Differentiators

We are best positioned to help CG on this initiative

- Thorough **knowledge of CG landscape**, context and interfacing systems through current engagements esp. Web Transformation/Authoring, Disclosure and Analytics services
- **Functional knowledge** - Upfront recognition of pain points and try to address those with Content Strategy & Migration
- **Authoring Experience** at CG & Learnings**:** Our team has **delivered several Authoring** projects and will bring their lessons learned to benefit CG
- **Automation & Accelerators:** Automation for content migration, Analytics & content validation
- **Training Workshop, Standards Guidelines:** Collaboration with CG team for authoring

Infosys Proposal

- We will bring our deep knowledge of your business, critical processes, data, systems and culture that we have gained over the years in delivering key Digital initiatives such as **Web Transformation, RIA and ML, Analytics and Disclosures.**
- We will **assemble a team with significant, relevant experience from existing projects** to deliver this initiative.
- Infosys is pleased to partner with CG on Long-Tail program with **two phase approach – Foundation & Migration** to streamline execution.
- We propose **Time & Material, two & half month engagement for Foundation phase** at ~**$297K** to detailed out migration strategy, content strategy/design, automation scripting followed by Migration.
- Estimated high-level cost of **Migration phase** is ~**$0.9M to $1M**, which can be optimized further and execute as Fixed Price engagement.

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Critical Success Factors for Long-Tail Program

Leverage Web Transformation Experience, Content Authoring Learnings, Automation/Accelerators, 24 x 5 work shifts and CG knowledge to deliver the Long-Tail program with minimal project risk.

1 Business Function knowledge

Upfront recognition of pain points and try to address those with Content Strategy & Migration

2 Leverage Digital Experience at CG

- Current engagement in Web Transformation program in developing AEM templates, components.
- Actively engaged on authoring for Web Transformation, RIA and CGII programs
- SME knowledge on new platform, Analytics, Disclosures and Site Validation.

3 Authoring Experience at CG & Learnings

Our team has **delivered several Authoring** projects and will bring their lessons learned to benefit CG

- Combination of Authors, Super-Authors and Technical Expertise
- Capacity-based model irrespective of Web sites for BAU and new experience migration

4 Automation/Accelerators

- Automation using content migration script
- Analytics Authoring Automation
- Simple Content Creation Automation
- Content Validation Automation

5 Training & Workshop, Standards Guidelines

- Collaboration with CG team for authoring
- Training CG associates on touch UI authoring
- Standards & Guidelines

6 Quick Time to Market

16 x 5 migration using offshore Content Authoring team optimizing schedule and cost

7 Content Strategy & Migration

Define and Standardize creation, delivery, and governance of useful, usable content

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Infosys Approach

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Long-Tail Program : Our Understanding

Capital Group's Objective

- Migrate content (~3000 pages) to new Web Transformation platform by Jun-2020
- Ensure only relevant and valuable content is migrated with required analytics and disclosures
- Improve maturity of Content Management and Governance for the creation, delivery, and governance of useful, usable content.
- Optimize content from Java stack pages to AEM to give more control for business to manage content changes
- Take advantage of migration to implement AA compliance, Year-end automation, etc.

Capital Group Business Users

What they say

- Authoring done at atomic levels
- Lack of Standards and Guidelines
- Lack of knowledge on new touch UI Templates & Components
- Is content ready to support forward looking features, such as personalization capabilities and dynamic content for all the different viewports?
- Manual effort to add Analytics
- Manual Disclosures and inconsistent implementation
- Manual Content Creation and Migration

What they need

- Clear Content Strategy with standardized approach to content, modules, templates
- Availability of documentation & training around authoring guidelines to allow self service
- Better support & integration of Disclosures, Analytics tagging and requirements
- Leveraging of automation to allow resources and time to be focused on high-priority pages & content
- Foundation for future – addressing any outstanding content and functional issues to allow for future enhancements
- Defined processes to allow for flexibility if needed while maintaining efficiency and responsiveness

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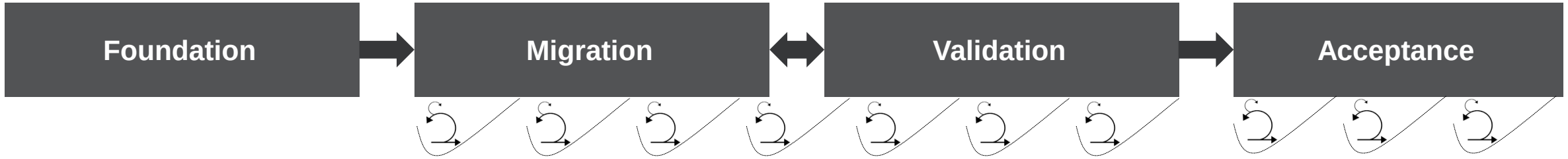
Implementation Approach



Foundation	Migration	Validation	Acceptance
Content Audit	Automated Page Migration • Script Finalization • Test Migration • Page Migration - multiple batches	AA Standards	Client Review and Acceptance
Page Matrix		Content / Code Compliance	
• Component Mapping Document Old to Touch UI • Touch UI Component Guide • Editorial Standards, Voice & Tone	Code for additional / missing WT templates & components	Analytics Compliance	Support Acceptance
Page Migration Batching	Java Stack Page Migration	Disclosure Compliance	
Migration Script Development and Java Stack Analysis	Manual Page Migration	Automated Regression & Performance Compliance	
Run State Processes	New Page / Copy Development and Asset Creation	Broken Link Checker	

Agile Sprints

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Foundation Phase - CG

Set the foundation for successful Migration

Activities

CG

Stakeholders

- Confirm Core Team and Stakeholders
- List of website owners for sign-off on requirements

Migration Requirements

- Existing Template Definitions
- Disclosure Requirements
- Analytics Requirements
- AA Standards
- Performance Requirements
- End-of-year requirements
- Multi-lingual support
- Asset/Document, Highchart Requirements

Client Page Audit

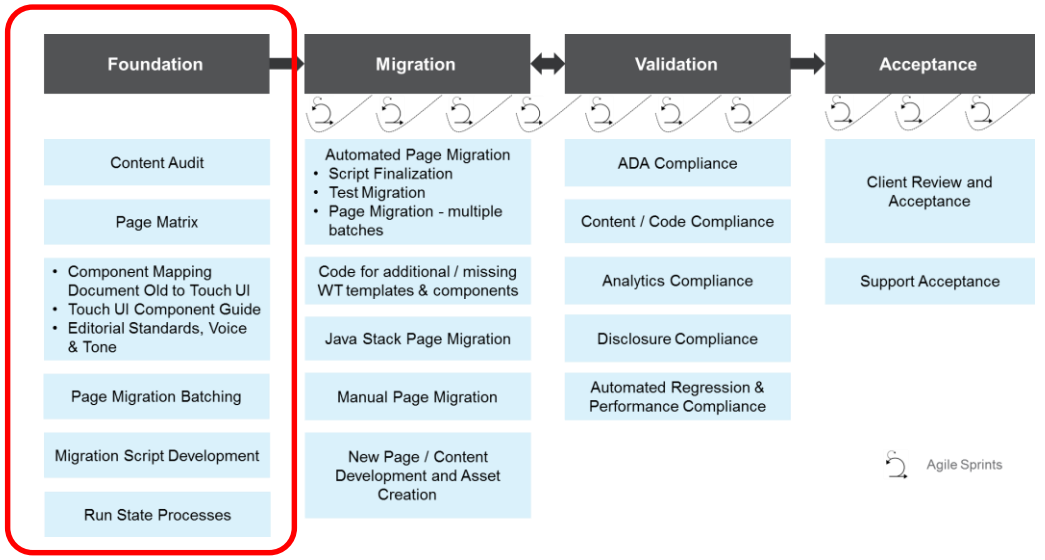
- To Be Migrated
- To Be Deleted
- To Be Created

Document Collection

- Style Guide
- Editorial Guidelines and strategic approach to content
- Existing Component Guide
- Touch UI Component Guide

Run State Processes

- Identify areas which will require process definition



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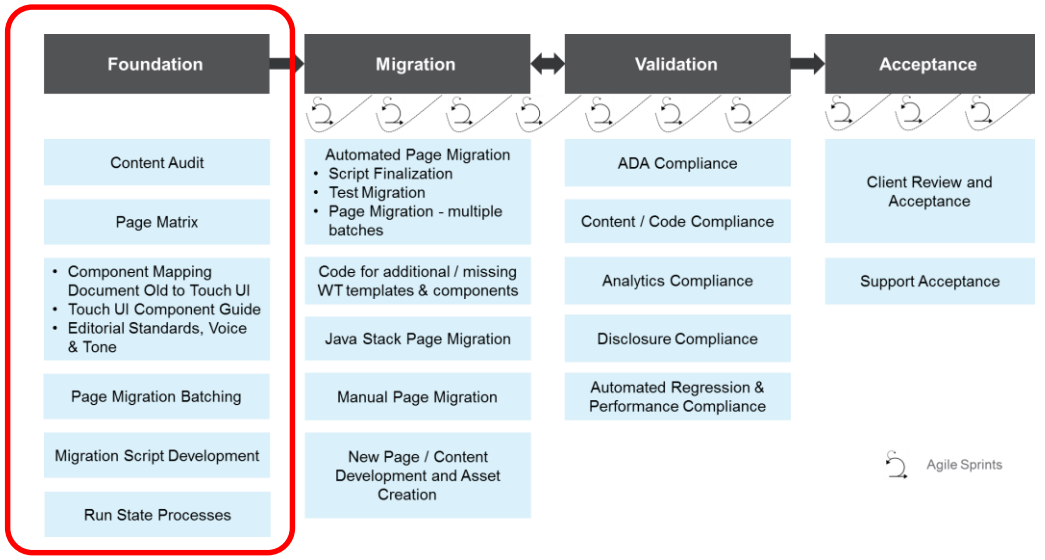
Foundation Phase - Infosys

Set the foundation for successful Migration



Activities

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Content Audit

- Review of All Client Supplied Documentation incl. content strategy, key topics and audiences
- Review of All Requirements
- Review of All Pages

Page Matrix

- Development of Page Matrix - As Is -> To Be
- Identify Pages with Missing Templates/Components
- Identify Pages with Analytics and Disclosures issues
- Identify Pages with AA issues
- Identify Pages with Creative Assets or Copy to be created
- Identify Pages to be Manually Migrated vs. Automated
- Identify existing charts for Highchart conversion feasibility

T&C Mapping, Standards & Guidelines

- Component Mapping Document Old to Touch UI
- Touch UI Component Guide
- Editorial Standards, Voice & Tone
- Page Migration Batching

Automation Script

- Definition of Automation Scripts based on deliverables
- Testing with Automation Scripts on Existing Content

Run State Processes

- Identify To-Be Processes for Content Migration
- Identify To-Be Processes for New Module Creation
- Identify Other To-Be Processes as requested by CG

Deliverables

- Page Matrix
- Automated Migration Script
- Template & Component mapping for Bulk Migration using automated scripts
- Touch UI Component Guide
- Editorial Standards and Guidelines
- Design for new experience
- Final estimates for Migration Phase

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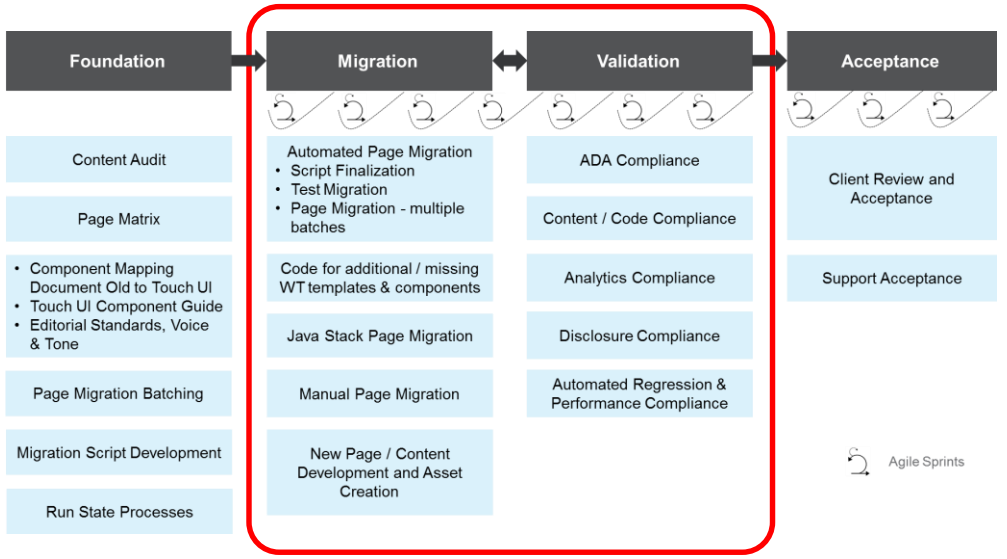
Migration & Validation Phase

Execute migration on Touch UI, set up analytics, disclosures & Validation



Activities

CG

Infrastructure

- Provide integrated environment for content migration
- Provide required access & privileges to the team
- Resolve environment level issues

Content Audit

- Participate in scrum meetings
- Review Content, Analytics, Disclosures
- Review Regression and Performance test results

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Page Migration

- Automated Page Migration
  - Script Finalization
  - Test Migration
  - Page Migration - multiple batches
- Java Stack Page Migration
- Manual Page Migration

New Content Development

- Code for additional / missing WT templates & components
- New Page / Copy Development and Asset Creation

QA

- AA Standards
- Content / Code Compliance
- Analytics Compliance
- Disclosure Compliance
- Client Review and Acceptance

Deliverables

- Migrated web sites on new Touch UI Platform enabled on supported viewports and browsers
- Migrated page property metadata (as is)
- Analytics
- Disclosure using DIG service
- Migration of static content pages from Java stack to AEM

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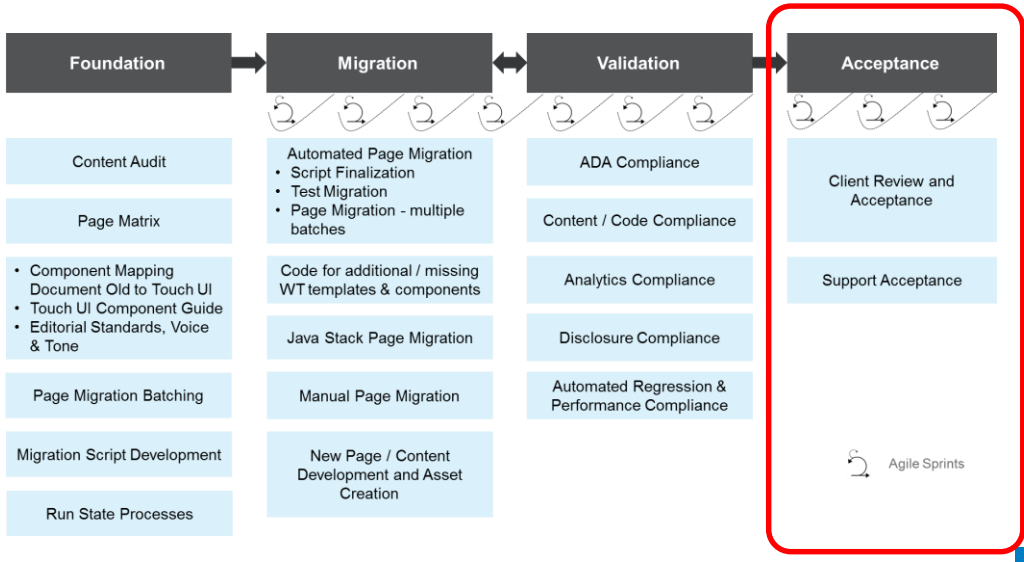
Acceptance Phase

Business validation, AA Standards, Regression testing & Performance



Activities

CG

Acceptance Testing

- Identify business users for Acceptance Testing
- Identify the business users roles
- Perform Acceptance Testing
- Provide feedback and test defects
- Review Regression and Performance test results
- Provide Acceptance Test Approval

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QA/Acceptance

- AA Standards
- Content / Code Compliance
- Mobile/Browser Testing
- Analytics Compliance
- Disclosure Compliance
- Automated Regression Testing
- Performance Testing
- Client Review and Acceptance

Defect Fixing

- Fix code for additional / missing WT templates & components
- Fix templates and components
- Fix content, analytics & disclosures

Deliverables

- Tested web sites on new platform, analytics and disclosure across supported viewports and browsers
- AA Standards
- Automated Regression Suite
- Performance Baseline

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Release Plan

Agile execution with early outcomes and streamlining the process for bigger milestones

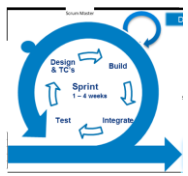
	M1 - Nov-19	M2 - Dec-19	M3 - Jan-20	M4 - Feb-20	M5 - Mar-20	M6 - Apr-20	M7 - May-20	M8 - Jun-20	M9 - Jul-20	M10 - Jul-20
FOUNDATION	**Current State Analysis** Content Audit, Page Matrix									
	Define Mapping, Touch UI Guide	Page Migration Batching Migration Script Dev't								
		Run State Processes								
MIGRATION, VALIDATION & ACCEPTANCE			Coding for new T&Cs → Manual Migration → QA → Business User Testing							Warranty Support
			Automated Migration → New Content Development							
			Advisor							
			Employer	TPA	RP	Institutional US	Investor			
CG TEAM		Foundation Phase Requirements		Acceptance Testing, Performance Validation, Sign Off						

Agile Sprint

Production Launch

Execution

Scrum team



Emergent design

Define → Sprint 0 → Develop

Iterative & incremental migration development

Product Backlog → **Prioritized Sprint backlog** → **Sprints**

Single Test Team

Sprint Demo

Retrospectives

T&M

FP

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Tools & Automation

Use Automation across all activities to reduce manual errors, optimize schedule and cost

Sr #	Tool/Automation	Description	Benefits
1	**Analytics Authoring Automation**	• Components will be configured with the default analytics metadata (predefined taxonomy) • Automated migration for analytics from legacy to new platform	Reduce multi-team dependency and save effort on authoring analytics
2	**Content Fragment Migration Automation**	• Script automates Content Fragment migration from Source to defined Destination • Converts from normal Content Fragment to Structured Content Fragment	Effort saving from manual authoring and eliminate human error
3	**Content Matching / Validation Across Pages**	• Tool crawls through the pages and matches the content between Source and Destination for easy comparison • Will be used for automated validation for content migration	Effort saving from manual validation and eliminate human error
4	**Disclosures Matching / Validation Across Pages**	• Validate the disclosures across pages	Automated disclosure validation
5	**Link Checker**	• Tool to validate the broken links using Xenu and custom built utility	Automated analytics validation

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Java Stack to AEM Conversion

Convert Java pages to AEM to improve maintenance and time to market for recurring initiatives & programs

Sr #	Proposal headline	Proposal Description / Problem Statement	Incidents / Stories (yr)	Benefits	Restrictions / Assumptions / Comments
1	**AEM Content Fragment for Banner Updates**	AEM Content Fragment to be created to make banner updates quicker, easier on Java stack pages.	25 stories	• Time to PRD can decrease from weeks to days • Effort & Cost needed would drastically decrease (Authoring changes only)	Solution applicable for banner text changes only. For new conditions, development effort would be required.
2	**Tools & Calculators Content**	• Move content for some Tools & Calculators to AEM, which require annual tax related changes. • Custom Content fragments would be used to move the content to AEM.	9 stories	• Time to PRD can decrease from weeks to days	Tools under consideration: • Spend It or Save It Calculator • Traditional vs Roth 401(k)/403(b) Analyzer • Taxes and Inflation Calculator • Payroll Deduction Analyzer
3	**Year-End**	RP Calculator Help pages: Help pages on RP Calculator would be moved to AEM	10 stories	• Time to PRD can decrease from weeks to days	Help pages require changes every year to be compliant with the new year's tax laws and slabs.
4		Annualized Total Returns: Move Annualized Total Returns download xls to AEM	1 story	• Time to PRD can decrease from weeks to days	Markit would be instructed to change the url to point to the new AEM DAM location
5	**Share class Returns Spreadsheets**	Move Total returns spreadsheet for individual share classes to AEM	12 stories	• Time to PRD can decrease from weeks to days • Automated process with minimal manual intervention with the usage of AEM workflows	• Markit would be instructed to change the url to point to the new AEM DAM location • To be done on the Production Author environment.
6	**Wholesaler Images**	Wholesaler images would be moved to AEM DAM	10 stories	• Time to PRD can decrease from weeks to days	Wholesaler images appear on Customized Advisor guide and Contact Us pages

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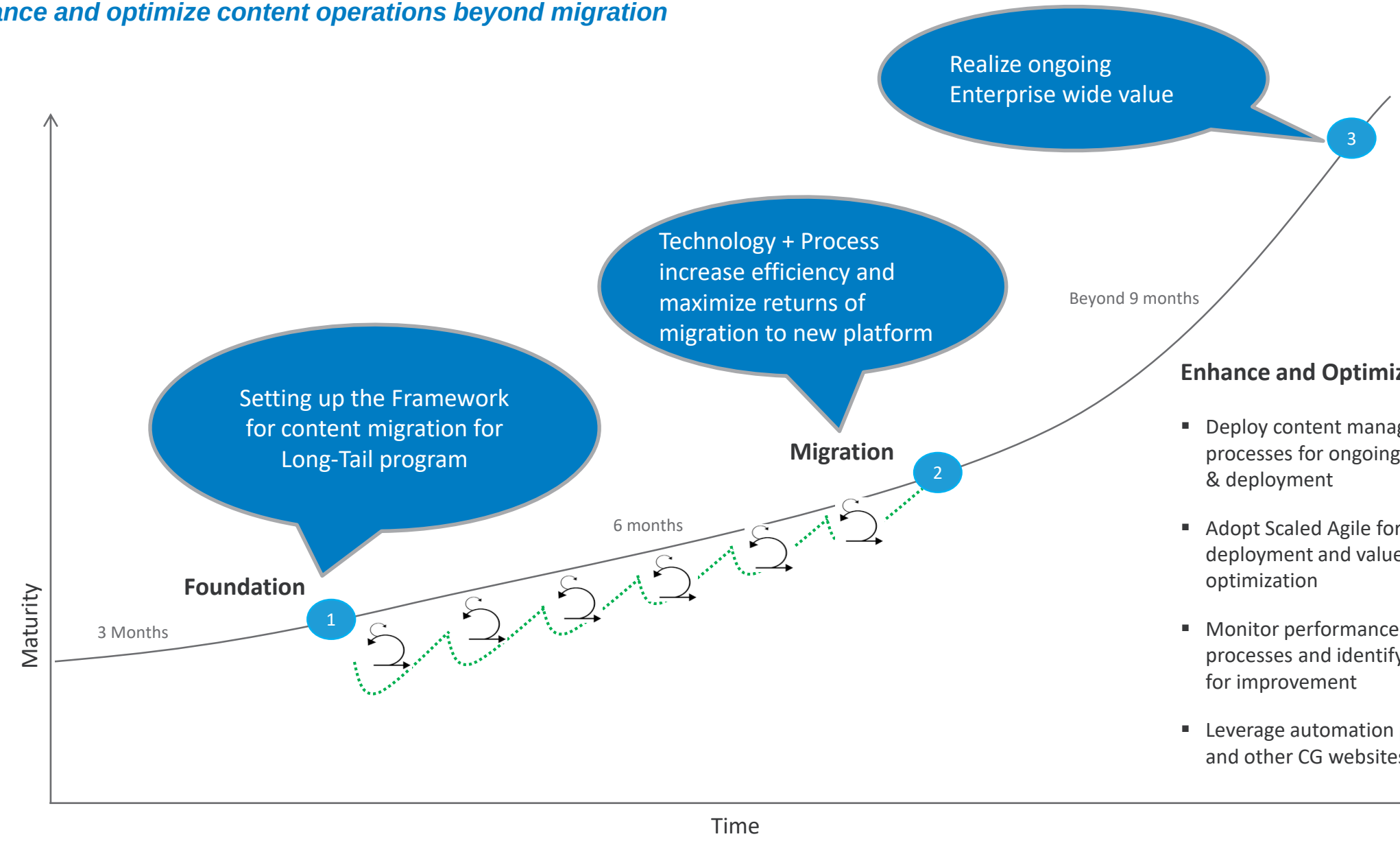
Value realization will continue beyond migration

Enhance and optimize content operations beyond migration



Enhance and Optimize

- Deploy content management processes for ongoing content creation & deployment
- Adopt Scaled Agile for rapid content deployment and value realization, cost optimization
- Monitor performance of new processes and identify opportunities for improvement
- Leverage automation process for BAU and other CG websites, if needed

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Our recommended migration approach will provide extensive value to CG, in the near term as well as on an ongoing basis

Core Migration Optimization

+

Business Process Improvements & Impact

+

Realized Value during ongoing BAU

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Core Migration Optimizations

Core Migration Optimization

Area	Projected Impact
Automated Content Migration Leverage Scripting to import content into new WT templates	Effort saving from manual authoring and eliminate human error More productive use of content fragments
Automated Analytics Tagging Suggested tags will automatically be recommended when new pages are authored	Reduce multi-team dependency and save effort on authoring analytics
Offshore Content Migration team Offshore team will allow for more cost effective manual migration	Quick time to Market with 16 x 5 migration using offshore Content Authoring team and optimizing schedule and cost
Standardized Mapping of Touch UI to WT Standardizing and culling down number of templates and variations will help reduce implementation time and effort	Optimizing schedule, cost and ongoing maintenance Streamlined operating environment through data standardization

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Business Process Improvements

Business Process Improvements & Impact

Area	Projected Impact
JAVA Stack Migration Semi-automatic migration of feasible Java (functional) pages	Quick time to Market and reduce IT dependency for ongoing changes Cost saving by reduction of build cycles Improve efficiency
Tools & Calculator AEM Migration Select calculators moved into AEM to simplify maintenance and updates	
Variable-ization Turning common year-end updates (e.g. Copyright date) into variables instead of hard-coded values	
Web Content Accessibility Guidelines (WCAG) Testing and Fixing of WCAG issues	Compliance with Accessibility requirements
Wholesaler Images Migration Move Wholesaler Images into DAM	Standardization of assets in single repository and improved asset management process
Disclosure Standardization Update migrated pages to consistently use DIG for Disclosure management	Reduce compliance production issues

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Realizing Value During Ongoing BAU

BAU Impact

Area	Projected Impact
Content Development Standardization	Improve speed & time to market for new content through standardization and templates
Process Automation Identify and Automate additional content development areas	Reduction in operations effort
24 x 7 Support	Availability on all time-zones Improved SLAs on ad-hoc content delivery and fast-track incidents
Self-sufficient BAU team - Super-Author/Developer - Author - Checker	Single team with technical and operational expertise to manage all changes like templates/components, content, analytics, disclosures & performance improvements Improve speed & time to market

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Scope and Assumptions

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Engagement Scope – Page Details

High level scope for migration in terms of number of pages and approach for migration. Will be revised after Foundation phase.

Migration of Advisor, Investor, RP, TPA, & Institutional pages (~3K) from NextGen Platform to new branding as per Web Transformation templates & components with predefined standards and guidelines

Website	Active Pages	Fragments	Articles	AEM Pages	Java stack Pages
Advisor	1688	118	202	638	730
Individual Investors	1073	149	89	360	475
Institutional	742	67	178	351	146
Employer	8	0	0	8	0
TPA	39	1	2	36	0
RP	297	72	0	156	69
TOTAL	**3847**	**871**	**610**	**1351**	**1393**
Decommission	~(1000 pages)	~(250)	~(250)	~(500)	
Pages for Migration	**2847**	**621**	**360**	**1351**	**893**

Migration Buckets	Approach	% of pages	Effort Required			
			Coding	Author	Checker	Regression Test
Fragments	Automation using migration script	3%	-	-	100%	100%
Articles	Automation using migration script	10%	-	30%	100%	100%
AEM Pages	Manual Authoring	34%	-	100%	100%	100%
Java Stack Pages	One time effort to AEM nodes for Java Pages	53%	100%	50%	100%	100%

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Engagement Scope

In Scope

Migration of content on Web Transformation Platform
- Migration of existing Nextgen Components (Classic UI) to WT Components (Touch UI)
- Creation of AEM Templates and Policies (if required).
- Migration of ~3000 pages for Advisor, Institutional, Retirement Planning, Individual, Employer, Third-Party Administrators.
- Script Creation & Execution for migrating existing content fragment into structured content fragment.
- Content publishing
- Webpages restructure using appropriate layout/component utilization based on requirements
- Migration of static content from Java stack to AEM

Analytics implementation using Adobe Launch

Disclosures using DIG Service

Validation of content/functionality on the production environment on multiple viewports

Release Management
- Participate in release management meetings to discuss changes, highlight any dependencies/risks

Status Reporting
- Attend daily and weekly team meetings to discuss, communicate and plan work to be done (schedule of the daily and weekly meetings will be discussed and agreed between CG & Infosys as per the team's convenience)

Warranty Support for a month after release

Out Of Scope

- Migration for PCS, Canada, EAD, Capital Ideas, Corporate and Internal websites.
- Hardware setup/procurement or Software installation / procurement if any in all environments.
- Licenses for all the technical components, 3rd party software's etc. & Credentials will be provided by CG. Support and maintenance for any 3rd party software used in solution will be provided by the respective software vendor.

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Assumptions

Scope	▪ Up to ~3000 Pages to be migrated to new Web Transformation platform . ▪ New Templates/Components: - We are considering ~ 10 new templates that needs to be created for estimation purpose. - We are considering ~ 20 components might be needed to develop for estimation purpose. ▪ Article Page Creation: Some articles are already created and we are considering ~400 Articles that need to be migrated for estimation purpose ▪ Authoring Content Fragments: We are considering ~400 Content Fragments that need to be migrated for estimation purpose
Templates & Components	▪ All Existing NextGen Components (Header, Footer, Office Locations etc.) should be converted to Touch UI ▪ Pages should be authored using the WT Templates and Components. ▪ Disclosures will be implemented using the DIG service
General	▪ Wireframes, Images, visuals layouts, style guides and graphics will be provided by CGC Designers. ▪ Minor UI changes would be acceptable as the WT components will have limitation to achieve. ▪ CG will review and sign off on all deliverables submitted by Infosys within agreed timelines as per schedule. ▪ Search Meta data will be migrated as-is ▪ CG will provide designs for Desktop, Tablet and Mobile breakpoints ▪ Analytics requirements are same as on classic pages ▪ Alt text will be provided for every chart and image
Commercial	▪ Onsite work location is CG IRV Office. Offshore work location is CG approved Infosys office. Any CG business related travel across the work locations mentioned above, will be borne by CG including lodging, boarding travel etc. ▪ Change management process will be followed to assess any impact to schedule, cost, due to • Changes in requirement/technology • Dependencies not met • Any new initiative or new Project - Technology Rationalization

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Team Structure, Roles and their Responsibilities

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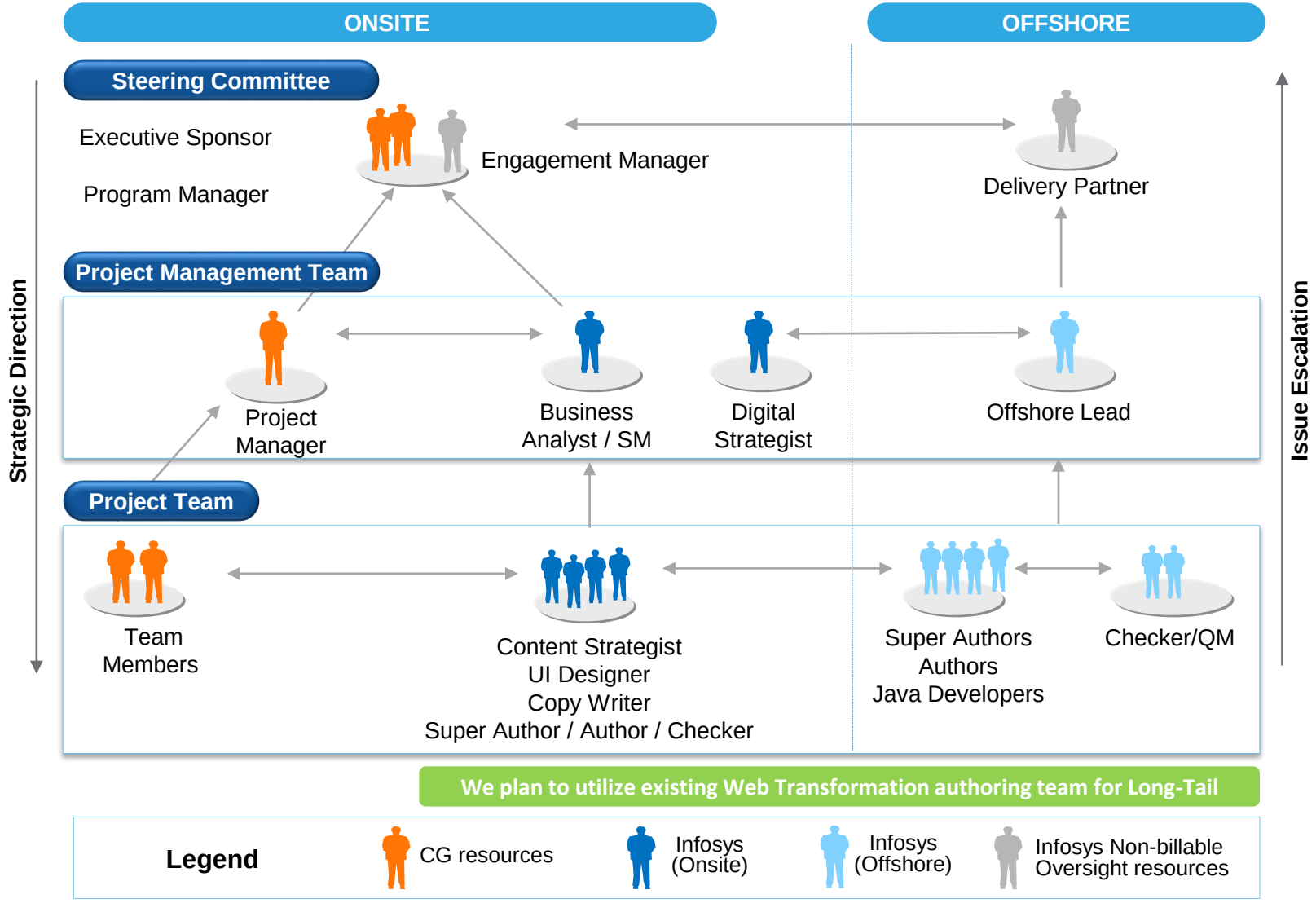
Team Structure & Governance Model

Robust and effective Governance | Well defined roles and responsibilities | Clearly defined escalation process



Monthly / Quarterly

Vision -
- Provide relationship vision and leadership
- Provide thought leadership
- Provide partnership alignment and growth
- Resolve escalated issues
- Effective collaboration & innovation

Weekly

Decision -
- Governance of the resources and deliverables
- Requirement prioritization
- Manage project/ services transition
- Develop scorecards and metrics
- Oversight, monitor, manage & control risks
- Manage & align all partner services
- Prog. status, ROI, risks, budgets etc.

Daily Scrum & Need basis

Execution
- Plan, organize and deliver the work stream Analysis of change impacts
- Deliverables – focused on results
- Escalations & Innovations
- Provides feedback to the Prog. Office
- Daily stand up meetings/ calls

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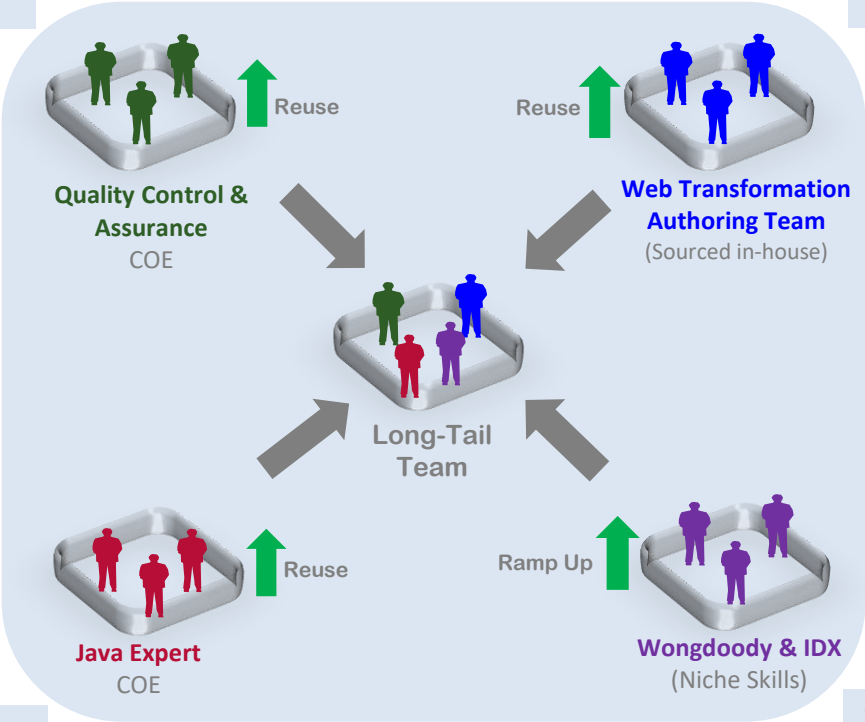
Sourcing Strategy

Infosys will retain key Web Transformation SME's from existing team to reuse their experience for optimizing schedule and cost. Rest of the team will be coming from different Center of Excellence.

Existing QM team with thorough knowledge on CG Websites for end-to-end system & integration testing including performance, AA Standards.

Web Transformation Authoring SME's *from existing WT Authoring team to retain platform knowledge and to maintain a balance between existing and new members.*



Existing Java Expert will be responsible for delivery of all Java technology track and work with AEM team to move the pages from Java to AEM

Wongdoody & Infosys Digital Experience Group combining business and technology expertise to deliver comprehensive services. Experts will help with migration strategy, UX, implementation, deliver high performance & drive continuous improvement

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Team Roles and Expectations: CG

#	Track	Role	Key asks / Expectations	Time Commitment
1	Management	Project manager	▪ Support managing project scope ▪ Liaison with other CG stakeholders and escalate as needed	As Planned
2	Management	Migration Council	▪ Identify Technology stakeholders ▪ Identify the Business Users roles ▪ Serve as escalation and resolution point for any issues	10%
3	Business	Business Users / Content Owners	▪ Provide direction on content requirements for owned pages ▪ Provide signoff on any template or module changes if required ▪ Provide signoff on pages once migrated to new platform	25-50% (Foundation) 10-25% (Migration) 25-50% (Acceptance)
4	Business	Accessibility Compliance	▪ Provide requirements for AA Standards ▪ Signoff on compliance for migrated website	10-25% (Foundation) 15-25% (Acceptance)
5	Creative	Creative Lead	▪ Provide style guide, editorial standards, template design and other design and user experience documents if needed ▪ Resolve questions or issues around template or component design & experience ▪ Signoff on any new copy or design elements created as part of migration	25-50% (Foundation) 10-25% (Migration)
6	Technology	Infrastructure Team	▪ Provide integrated environment for content migration ▪ Provide required access & privileges to the team ▪ Resolve environment level issues ▪ Software upgrades	5%

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Team Roles and Responsibilities: Infosys

#	Role	Key Responsibilities / Activities
1	Digital Strategist	▪ Work with CG to document and understand requirements ▪ Work with Infosys team to translate requirements into project deliverables
2	Business Analyst / Scrum Master	▪ Work with Digital Strategist during requirements collection phase ▪ Liaise with CG to understand the business requirements and the functional goal ▪ Support managing project scope ▪ Work closely with Infosys technology team to ensure technical requirements are being addressed
3	Content Strategist	▪ Review existing content documentation, strategy, guidelines and requirements ▪ Review existing pages and creative assets ▪ Develop and document approach for content migration, including deliverables such as page matrix, components guide, editorial standards, migration batches ▪ Note gaps and identify what needs to be created.
4	Copywriter	▪ Write additional copy snippets (e.g. headlines, captions, alt-text) as needed
5	UX Designer	▪ Design and produce any new or updated creative assets (e.g. charts or tables, image resizing, etc.) ▪ Document any design rules for inclusion in style guide
6	Super Author	▪ Participate in release management meetings to discuss changes, highlight any dependencies/risks ▪ Attend daily and weekly team meetings to discuss, communicate and plan work to be done ▪ Provide inputs for release plan in consultation with QM and CG release team ▪ Content design and any development activities prior to Content authoring and review authored pages. - Taxonomy definition or design. - Disclosure configuration and context setup. - Content back-publishing to lower environments.
7	Author	▪ Update the webpages or create new webpages using AEM WT templates, components, assets in DAM. ▪ Schedule, plan and execute the content edit request for assembling the digital platform experiences. ▪ Webpages restructures using appropriate layout/component utilization based on requirements. ▪ Managing the digital assets used in content authoring through Adobe Digital Asset Management tool. ▪ Migrate the content from old platform to AEM platform for Capital Group websites
8	Checker/QA	▪ Validate authored pages, content, metadata & digital assets ▪ System testing, System integration testing, Regression testing, Test Automation, Performance testing co-ordination

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Commercials

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Commercials – Foundation Phase

Foundation Phase:

- Proposed Engagement Type: **T&M**
- Start Date: 14-Oct-2019
- End Date: 31-Dec-2019
- Duration : 11 Weeks ~ 2.5 Months
- **Estimated Service Cost:** **$ 297K** (Post MSA Discount)

Migration Phase: (Content Migration, Validation, Acceptance & Warranty)

- Proposed Engagement Type: **FP**
- Start Date: 01-Nov-2019
- End Date: 31-Jul-2020
- Duration : 9 Months
- **Estimated Service Cost:** **~ $ 0.9M to $1M ***

Assumptions

- * Estimated service cost for Migration Phase will be optimized based on detailed scope analysis and automation scripting during Foundation Phase.
- Infosys will accommodate any scope and requirement changes that do not have a major impact on schedule and cost. However, any change with significant impact will be mutually agreed upon, and will be followed through a change management process.
- All terms and conditions apply as per the MSA.
- 2-4 Weeks lead time is required for new resource on-boarding

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Appendix (Case Studies)

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Case Study – Transforming the CMS of an American utility company

Overview

- Primary **electricity supply company** for much of Southern California

Business Need

- American utility company wants to **move from a legacy CMS to a modern open source CMS** but there were lot of variations which involved tedious work involved and entails multiple handoffs
- There were other **challenges** that the client was facing such as :
  - Fragmented contents
  - No proper documentations
  - No clarity on metadata and page properties
  - Lack of skilled resources

Infosys Solution

- Envisioning the future state of operations, Infosys offered migration services as a precursor. This proved to be a vital link in the **transformation journey to a modern CMS** for the company. .
- **500+ web pages with 200+ non English language pages** migrated
- Quick ramp-ups to finish specific tasks meant that no bottle necks to the transformation journey
- **SOP's and process maps documented** and signed in the first month of the project
- **Post migration the team** continues to work on regular content updates and new page development.

Benefits Delivered

- **Successfully migrated** all the pages and went live on the stipulated time
- **Consolidated operations from multiple owners easing the time and effort needed to fulfill**

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Case Study – Flexible operations model to suit migration and taxonomy support for a leading financial services company in Australia and New Zealand

Overview

- A **leading financial services** company in Australia and New Zealand providing superannuation and investment products, insurance, financial advice and banking products

Business Need

- Client wanted to **enhance their website's look and feel** hence wanted to migrate it from a legacy version of AEM to the latest which is responsive and touch compatible.
- The client had the following challenges for the same :
  - Complex website structuring
  - Multiple levels of license based content
  - Non availability of resources with the required skill set
  - Coordinating with multiple internal senior stakeholders is a bottleneck
  - Tedious, Laborious and non standard process
  - Unorganized Assets and documents

Infosys Solution

- **End to end mapping of 1100 pages** to their respective new location in Adobe Experience Manager (AEM)
- Multiple levels of license based content
- Deployed **Digital Strategist & Sr. Business Analyst** in the onshore to liaise with the senior stakeholders
- Created **SOPs and an extensive author guides** to help both internal and external stakeholders
- **Standardized the Asset Management process** with proper naming convention

Benefits Delivered

- **Consolidated operations** from multiple owners easing the time and effort needed to fulfill
- Isolated and removed the duplicate ticket handling process
- **Implemented design rules and brought brand harmony** across the websites

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Case Study – Capital Group Web Transformation Authoring

Overview

- Web Transformation program is transforming the existing capital group web properties into an engagement platform, with the aim of driving leads into conversion in support of NAD sales and asset retention goals.
- New reusable core components to build and update existing digital experience

Business Need

- Deliver **tailored content and personalized experiences**.
- Establish a modern design with great utilities that surprise and delights clients.
- **Website Consolidation** with reduction in number of Templates & Components
- **Prioritization and Governance model** for page design and meta data
- **Centralized repository** for managing and storing the digital assets
- **Asset Optimization**

Infosys Solution

- **Rebranded digital experiences** across sites.
- **Consolidation** of existing sites into a unified site and single navigation.
- Used Adobe experience manager DAM for storing assets like images, videos, audio, content fragments, experience fragments.
- Used WT core templates & components to author pages.
- **Reduced time for authoring** by using editable templates.

Benefits Delivered

- **Brand new toolkit** compatible with desktop, table and mobile enabling an improved user experience with global style system.
- Bridge infrastructure to allow new and legacy component to co-exist.
- New Anonymous Homepage , Advisor Homepage, Investors Homepage, Institution Homepage.
- Milestones achieved before the proposed timelines.
- **Quality of service**

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Thank you!

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