MasterCard Global Marketing Center A Crafter CMS and Alfresco Case Study

Jay Mandel, MasterCard International
Mike Vertal, Rivet Logic Corporation
15 November 2012

MasterCard Worldwide

rivetlogic

Business Goals

- Improve efficiency and productivity through enhanced design, navigation and content
- Deliver sales and marketing content and tools from many sources in one easy to use location

Program Objectives

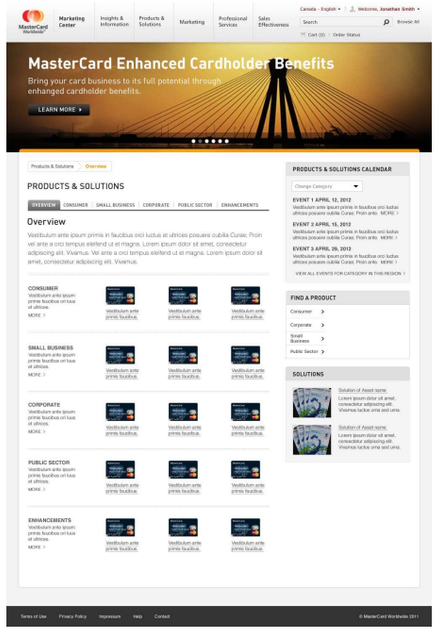
- Deliver the right content, to the right audience at the right time
- Allow for non-technical business users to easily manage content
- Consolidate duplicated efforts
- Create common reusable components
- Ensure tool is scalable enough to grow with the company and connect with other systems

Marketing Center: Consolidation of Fragmented Sites

Old: 20+sites

- Various Web Properties/Platforms
- Varying Levels of Security & Authentication
- Site-Specific Tools, Functionality & Design
- Varying Technologies & Architectures

New: Marketing Center



- Global Consolidation
- Individual Audiences Recognized
- Core Level of Security & Authentication
- Common Utilities & Functionality
- Universal Technology & Architecture
- Centralized, Strategic Platform
- Consistent, Clear, Timely Content

Site Requirements (End User)

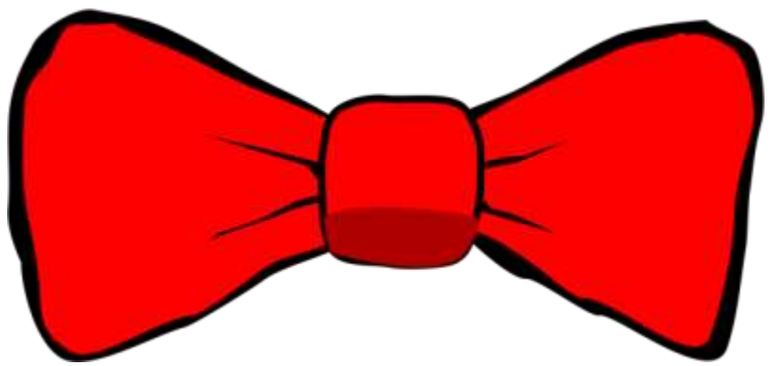
- Global marketing support
- Search-based repository of marketing assets
- Faceted search and intuitive filtering of results
- Single sign-on
- Intuitive calendar for marketing events and campaigns
- Shopping cart (future)
- Salesforce.com integration (future)

CMS Requirements (Authoring & Publishing)

- Easy to use and intuitive for business users
- Taxonomy-based authoring
- Workflow-based approval of content with preview
- Simple publishing process
- Role-based authoring

The Model

- Business Owner / Digital Owner
- Global Stakeholders: Inform
- Agency support
  - Digital Agency: Wireframes & Designs
  - Technical Agency: Architecture & Implementation
  - Agile methodology promotes better user acceptance
- The bow tie

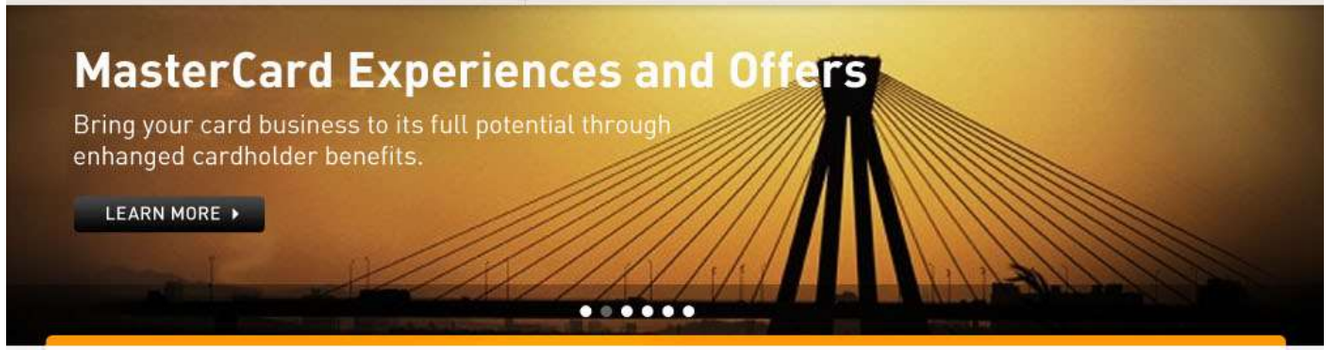


Informed Vendor Selection

- Created RFP in collaboration with internal stakeholders to ensure business needs were met
- Evaluated agencies based on
  - Expertise
  - Quality of work
  - SOW requirements
  - Due diligence

Informed Vendor Selection

- Vendor high-level requirements
  - Specialized ECM firm, not a “digital ad agency”
  - Thought leaders: demonstrated Alfresco and ECM expertise
  - Well rounded business process consulting and a demonstrated track record with global corporations
  - Sense of urgency
  - Strong project management; agile methodology



Priceless New York

Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; Proin vel ante a orci tempus eleifend ut et magna. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vivamus.

MORE

CONSUMER CREDIT CARD WELCOME BROCHURE

Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; Proin vel ante a orci tempus eleifend ut et magna. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vivamus.

MORE >

REMAINING RELEVANT: SEVEN CONSUMER TRENDS TO WATCH

Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; Proin vel ante a orci tempus eleifend ut et magna. Lorem ipsum dolor sit amet.

MORE >

U.S. ECONOMIC OUTLOOK WEBINAR

Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; Proin vel ante a orci tempus eleifend ut et magna. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vivamus.

MORE >

CALENDAR OF EVENTS

Change Category

EVENT 1 APRIL 12, 2012
Vestibulum ante ipsum primis in faucibus orci luctus ultrices posuere cubilia Curae; Proin ante. MORE >

EVENT 2 APRIL 15, 2012
Vestibulum ante ipsum primis in faucibus orci luctus ultrices posuere cubilia Curae; Proin ante. MORE >

EVENT 3 APRIL 29, 2012
Vestibulum ante ipsum primis in faucibus orci luctus ultrices posuere cubilia Curae; Proin ante. MORE >

VIEW ALL EVENTS FOR CATEGORY IN THIS REGION >

FIND A PRODUCT

- Consumer >
- Corporate >
- Small Business >
- Public Sector >

LOREM IPSUM DOLOR

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vivamus luctus urna sed.

MORE >

LOREM IPSUM DOLOR

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vivamus luctus urna sed urna condimentum. Lorem ipsum dolor sit amet, consectetur adipiscing.

MORE >

© MasterCard Worldwide 2011

fresco.org devcon 2012

Title Goes Here and It May Be This Long

Previous / Next image (2 of 4)

Picture title:
Picture caption goes here

How to Get This

At vero eos et accusamus et iusto odio dignissimos ducimus qui blanditiis usto praesentium eos et accusa.

DOWNLOAD ALL

Asset description goes here and should ideally be about as long as shown (one hundred and fifty characters). Do plan for translation expansion.

Opt-in dates: Dec 1, 2011 - Jan 30, 2012

Program dates: Dec 31, 2011 - Jan 15, 2012

Event dates: Jan 14-15, 2012

Partner URL can go here and hopefully doesn't wrap but can if it needs to

Markets: Angola, Burkina Faso, Cape Verde, Djibouti, Ethiopia, Guinea-Bissau, Kenya

See All ›

Segments: HNW, Mass Affluent, Youth

Tags: tagName, anotherTagName, TagName, TagName, TagName, TagName

See All ›

INCLUDES:

File Name

File description goes here and should have a maximum length about as shown here (one hundred and fifty characters). Plan for translation expansion.

PDF (69k)

DOWNLOAD THIS

File Name

File description goes here and should have a maximum length about as shown here (one hundred and fifty characters). Plan for translation expansion.

PDF (69k)

DOWNLOAD THIS

File Name

File description goes here and should have a maximum length about as shown here (one hundred and fifty characters). Plan for translation expansion.

PDF (69k)

DOWNLOAD THIS

HEADLINE (SHORT)

Solution name 1
Solution name 2
Asset name 1
External ink name here
Another link name

HEADLINE (SHORT)

Solution of Asset name can be 120 characters long, whichwould be as long as this text that wraps across several lines.

Solution or asset description goes here and can run as long as shown (one hundred and fifty characters). Do plan for translation expansion here too.

Solution of Asset name can be 120 characters long, whichwould be as long as this text that wraps across several lines.

Solution or asset description goes here and can run as long as shown (one hundred and fifty.

HEADLINE (SHORT)

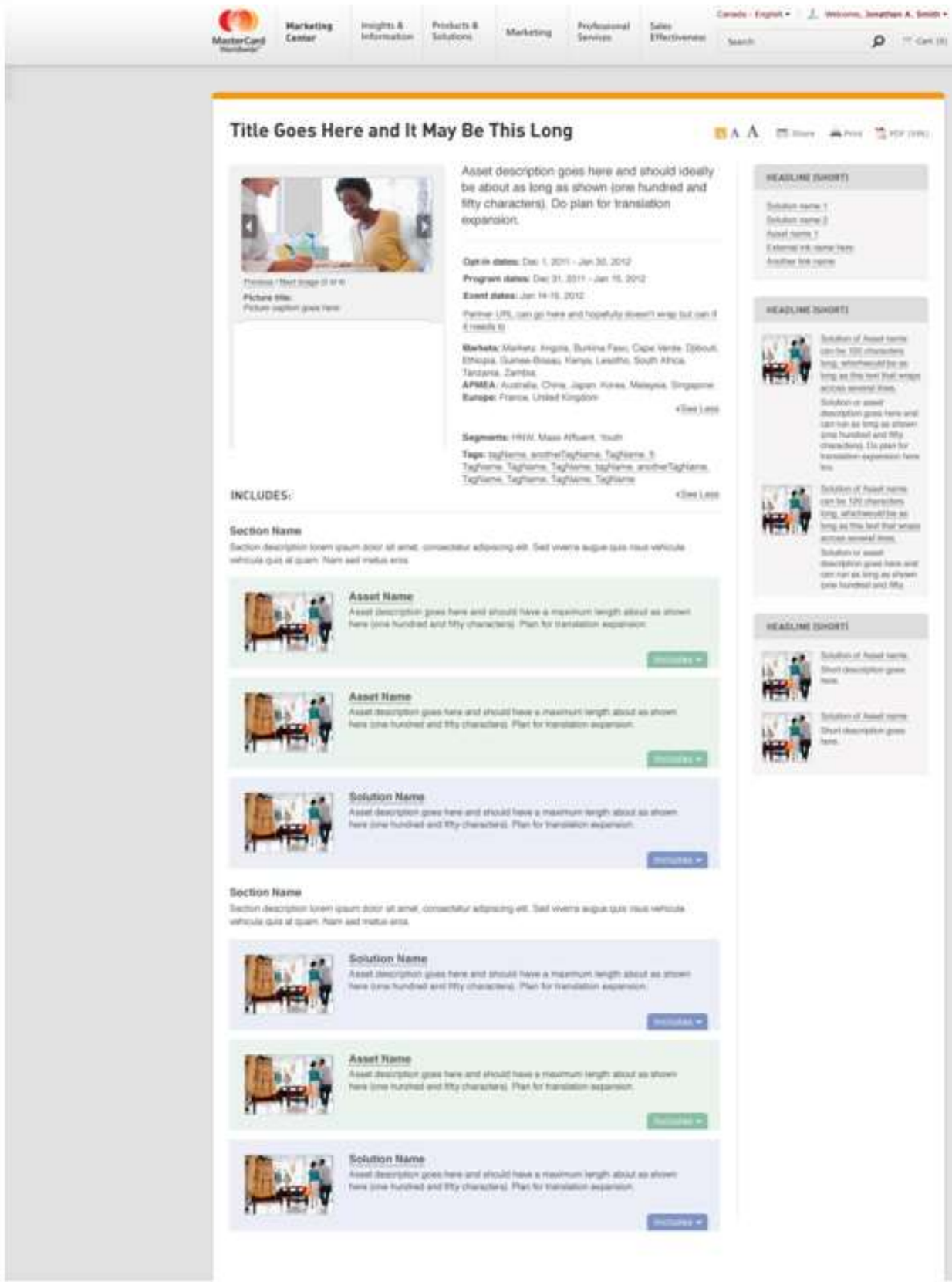
Solution of Asset name

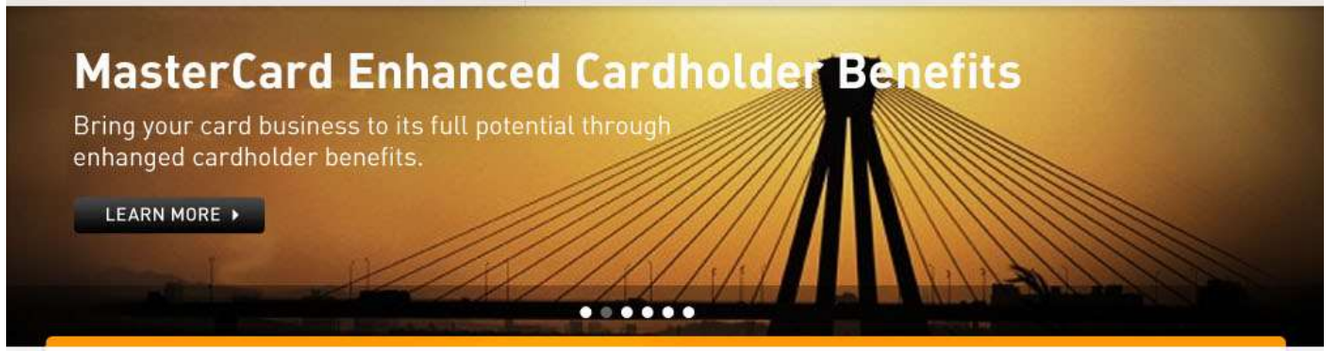
Short description goes here.

Solution of Asset name

Short description goes here.

© MasterCard Worldwide 2011


Marketing Center
Insights & Information
Products & Solutions
Marketing
Professional Services
Sales Effectiveness
Search
Title Goes Here and It May Be This Long
Asset description goes here and should ideally be about as long as shown (one hundred and fifty characters). Do plan for translation expansion.
Opt-in dates:
Program dates:
Event dates:
Segments:
Tags:
INCLUDES:
Section Name
Section description lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed viverra augue quis risus vehicula vehicula quis at quam. Nam sed metus eros.
Asset Name
Asset description goes here and should have a maximum length about as shown here (one hundred and fifty characters). Plan for translation expansion.
Asset Name
Asset description goes here and should have a maximum length about as shown here (one hundred and fifty characters). Plan for translation expansion.
Solution Name
Asset description goes here and should have a maximum length about as shown here (one hundred and fifty characters). Plan for translation expansion.
Section Name
Section description lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed viverra augue quis risus vehicula vehicula quis at quam. Nam sed metus eros.
Solution Name
Asset description goes here and should have a maximum length about as shown here (one hundred and fifty characters). Plan for translation expansion.
Asset Name
Asset description goes here and should have a maximum length about as shown here (one hundred and fifty characters). Plan for translation expansion.
Solution Name
Asset description goes here and should have a maximum length about as shown here (one hundred and fifty characters). Plan for translation expansion.
HEADLINE (SHORT)
HEADLINE (SHORT)
HEADLINE (SHORT)
Section Name
Section description lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed viverra augue quis risus vehicula vehicula quis at quam. Nam sed metus eros.
Asset Name
Asset description goes here and should have a maximum length about as shown here (one hundred and fifty characters). Plan for translation expansion.
File Name
File description goes here and should have a maximum length about as shown here (one hundred and fifty characters). Plan for translation expansion.
File Name
File description goes here and should have a maximum length about as shown here (one hundred and fifty characters). Plan for translation expansion.



PRODUCTS & SOLUTIONS

Overview

Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; Proin vel ante a orci tempus eleifend ut et magna. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vivamus. Vel ante a orci tempus eleifend ut et magna. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vivamus.

CONSUMER
Vestibulum ante ipsum primis faucibus ori luus et ultrices.
MORE >

Vestibulum ante primis faucibus.

Vestibulum ante primis faucibus.

Vestibulum ante primis faucibus.

SMALL BUSINESS
Vestibulum ante ipsum primis faucibus ori luus et ultrices.
MORE >

Vestibulum ante primis faucibus.

Vestibulum ante primis faucibus.

Vestibulum ante primis faucibus.

CORPORATE
Vestibulum ante ipsum primis faucibus ori luus et ultrices.
MORE >

Vestibulum ante primis faucibus.

Vestibulum ante primis faucibus.

Vestibulum ante primis faucibus.

PUBLIC SECTOR
Vestibulum ante ipsum primis faucibus ori luus et ultrices.
MORE >

Vestibulum ante primis faucibus.

Vestibulum ante primis faucibus.

Vestibulum ante primis faucibus.

ENHANCEMENTS
Vestibulum ante ipsum primis faucibus ori luus et ultrices.
MORE >

Vestibulum ante primis faucibus.

Vestibulum ante primis faucibus.

Vestibulum ante primis faucibus.

PRODUCTS & SOLUTIONS CALENDAR

Change Category

EVENT 1 APRIL 12, 2012
Vestibulum ante ipsum primis in faucibus orci luctus ultrices posuere cubilia Curae; Proin ante. MORE >

EVENT 2 APRIL 15, 2012
Vestibulum ante ipsum primis in faucibus orci luctus ultrices posuere cubilia Curae; Proin ante. MORE >

EVENT 3 APRIL 29, 2012
Vestibulum ante ipsum primis in faucibus orci luctus ultrices posuere cubilia Curae; Proin ante. MORE >

VIEW ALL EVENTS FOR CATEGORY IN THIS REGION >

FIND A PRODUCT

- Consumer >
- Corporate >
- Small Business >
- Public Sector >

SOLUTIONS

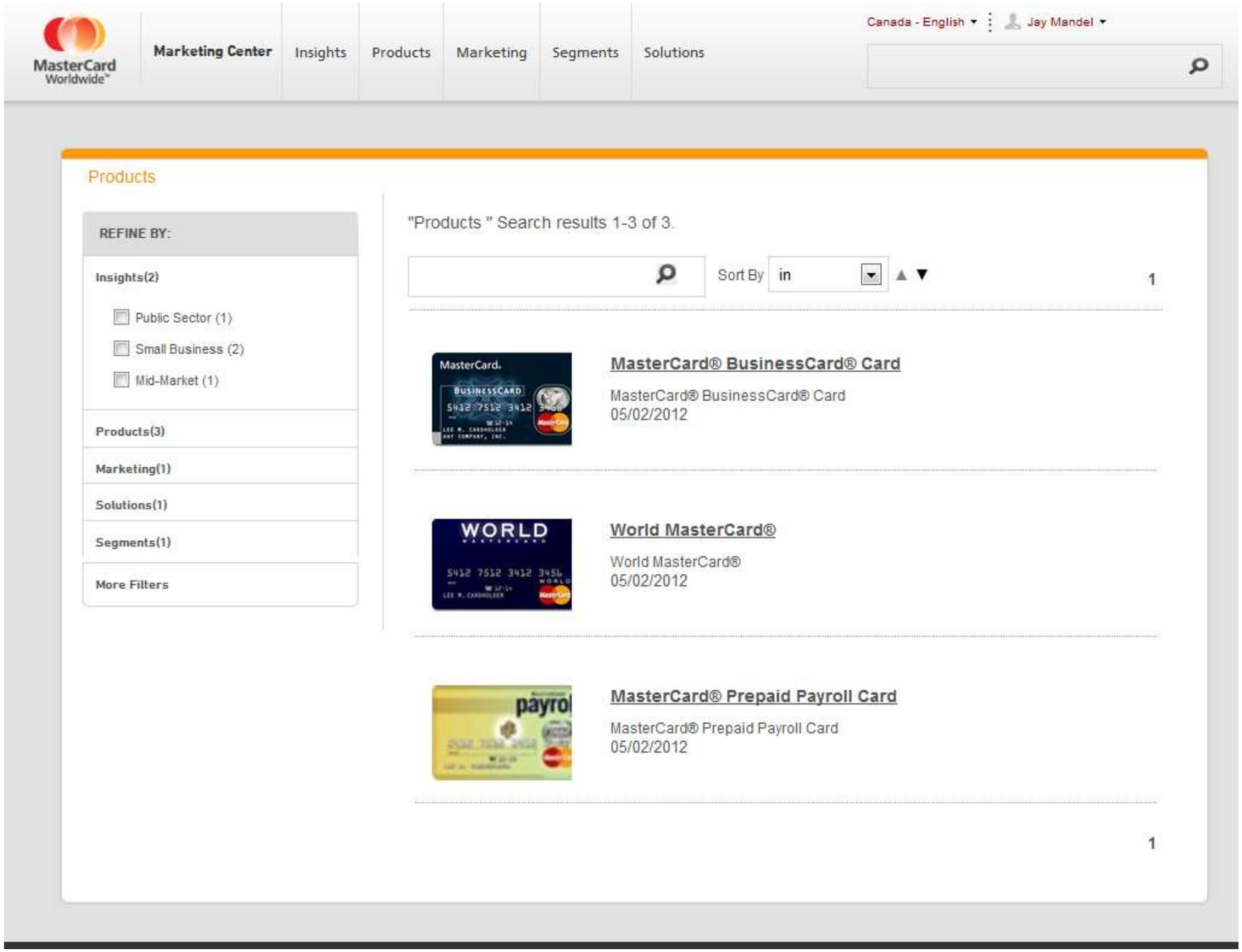
Solution of Asset name
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vivamus luctus urna sed urna.

Solution of Asset name
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vivamus luctus urna sed urna.

© MasterCard Worldwide 2011

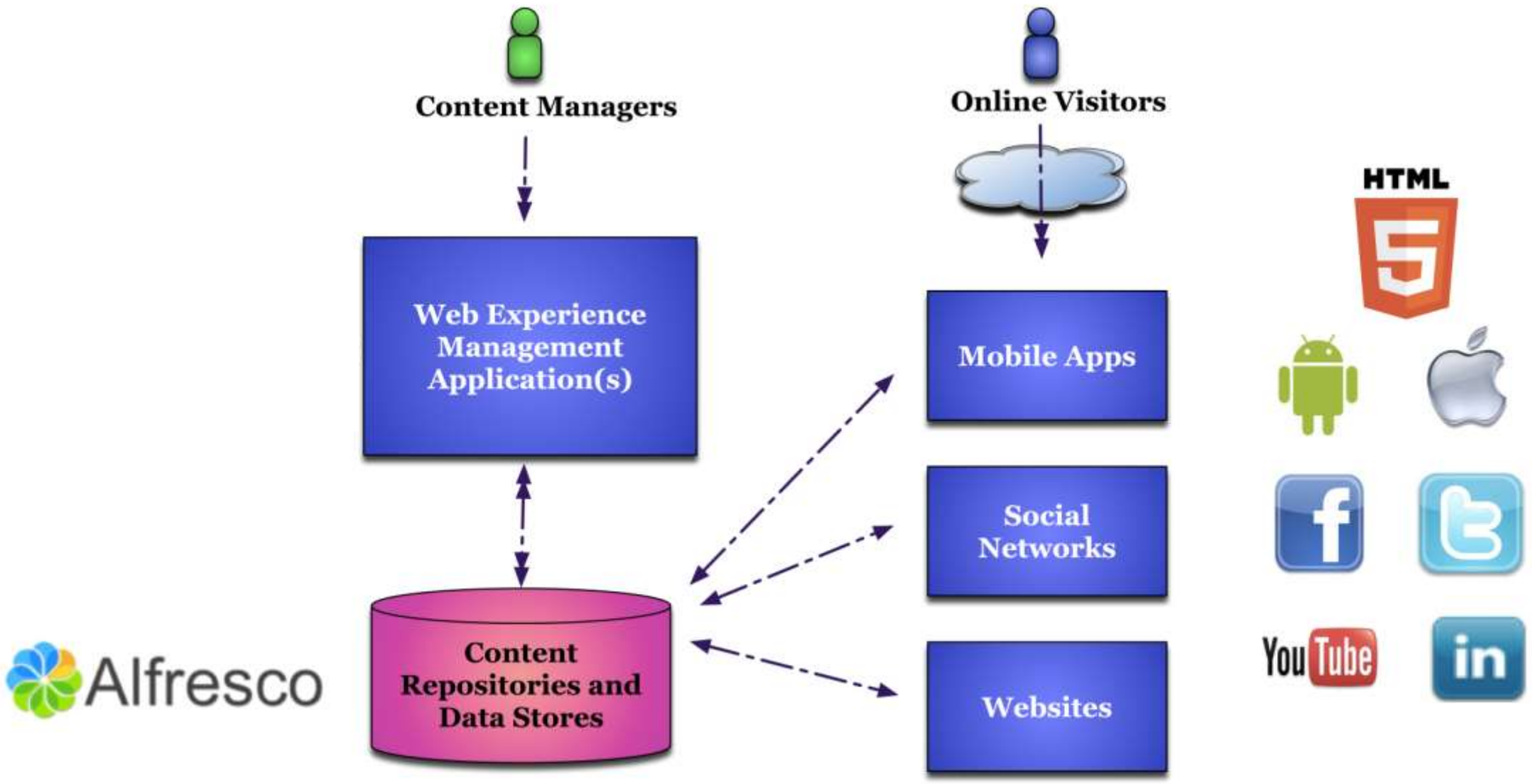
fresco.org devcon 2012

Faceted Search

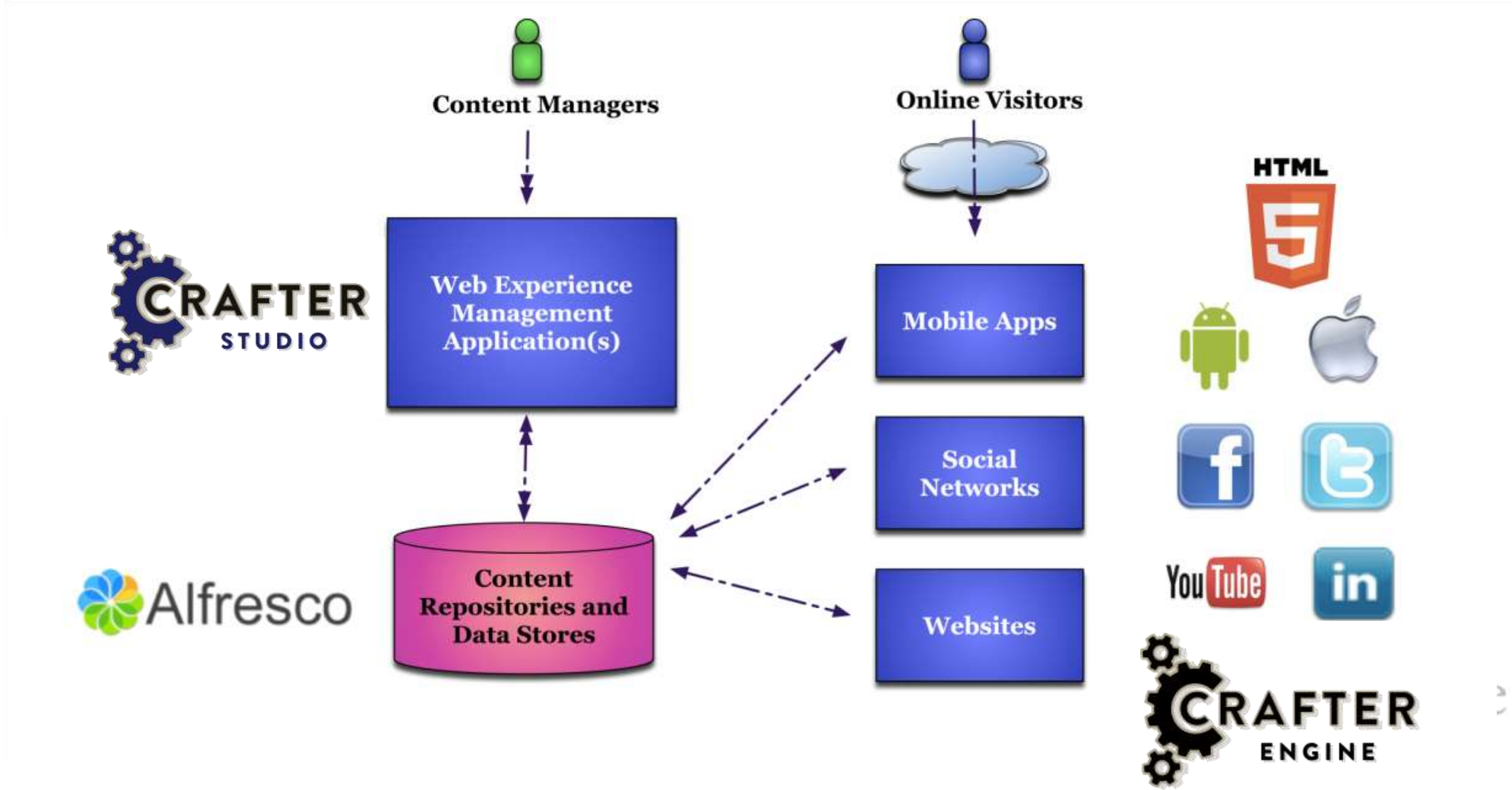


Let’s get technical

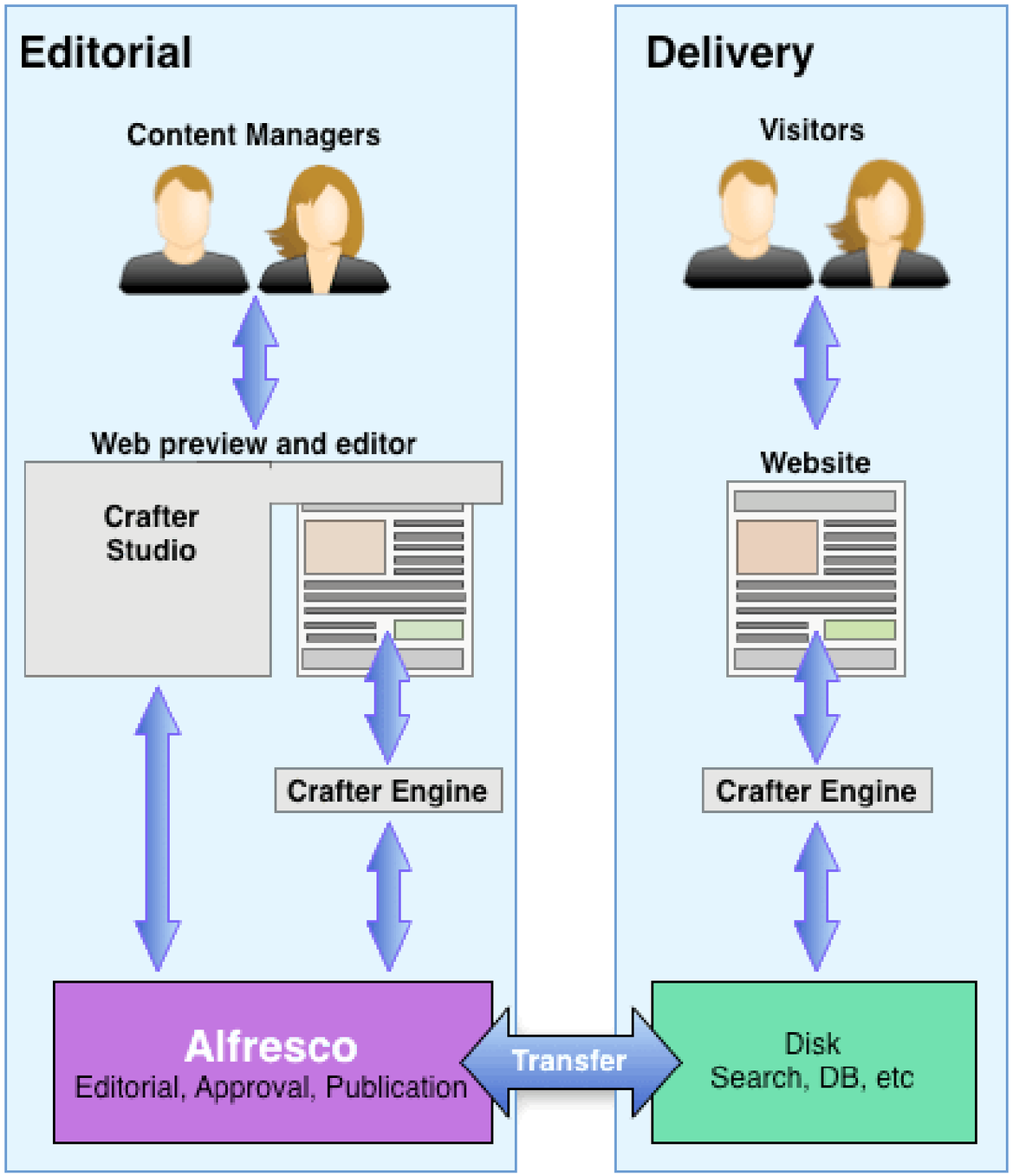
Alfresco Web CMS Solution Architecture



Alfresco Web CMS Solution Architecture



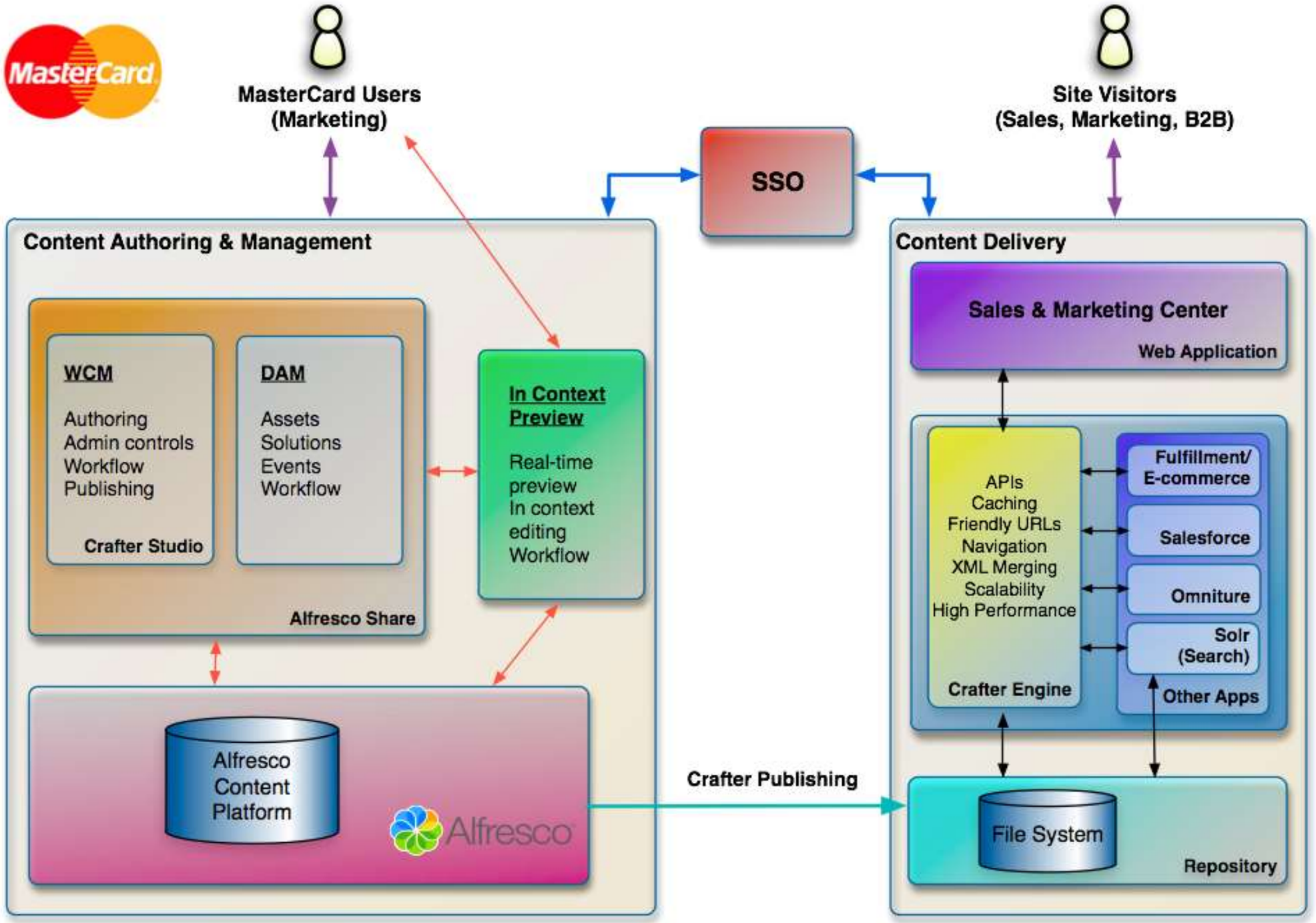
De-coupled Management and Delivery



Why a de-coupled architecture?

- Easier to manage
- Easier to scale out
- Multi-channel support
- Higher system reliability, maintainability, ROI

Marketing Center - Solution Overview



Alfresco Content Platform

Services Distribution Layer

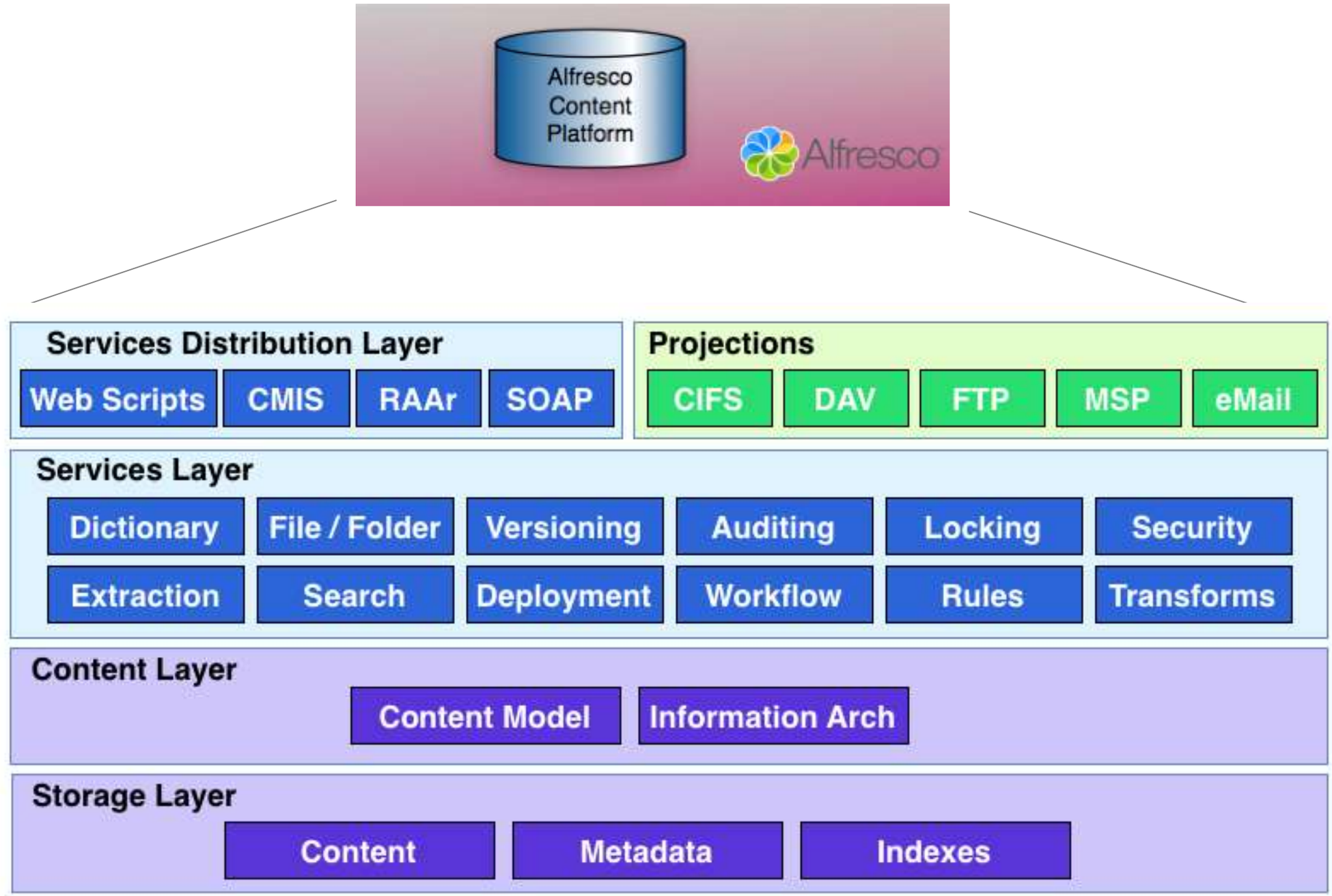
Projections

Services Layer

Content Layer

Storage Layer

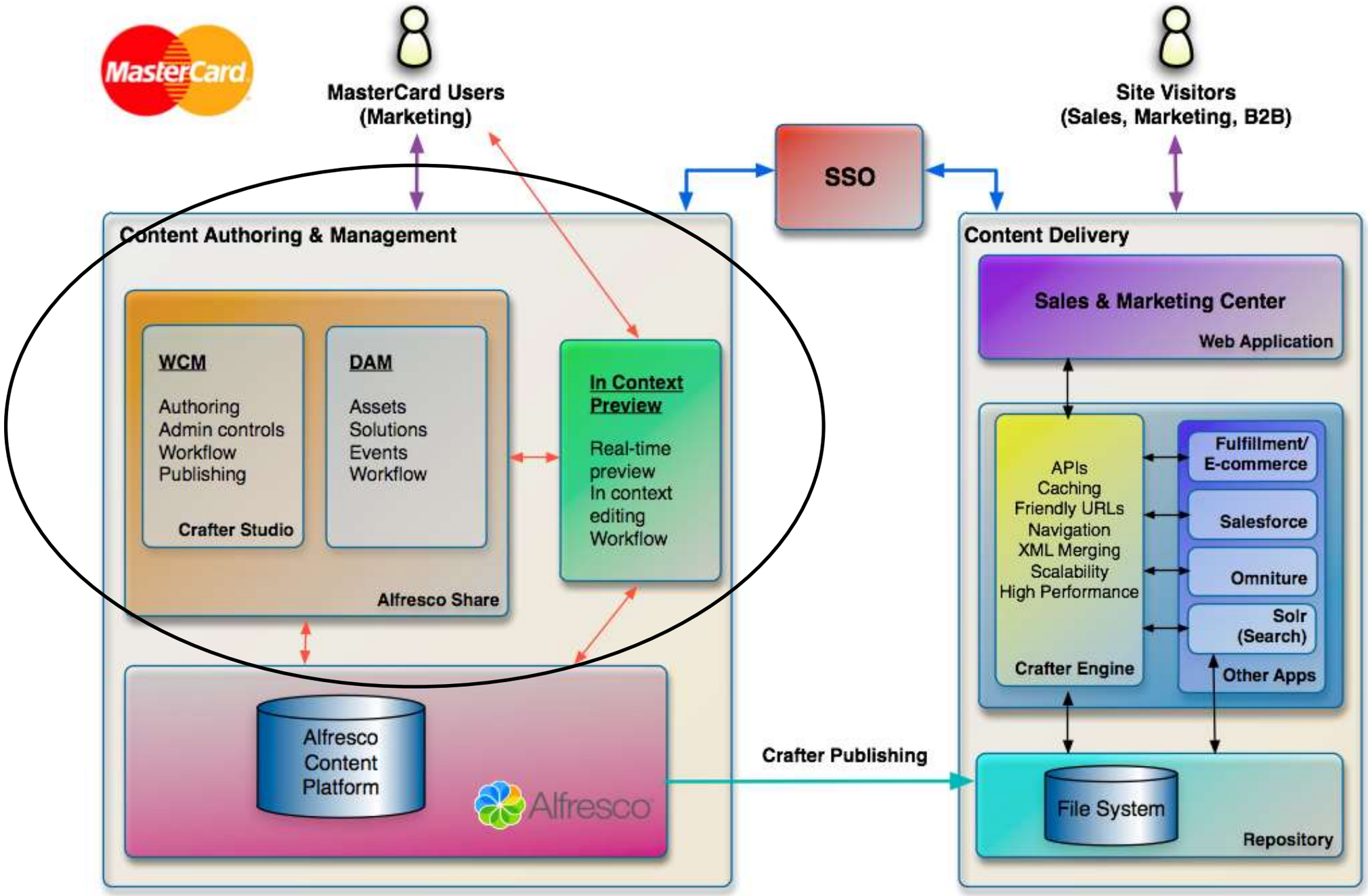
Alfresco Content Platform



Key Alfresco Capabilities for the MasterCard Marketing Center

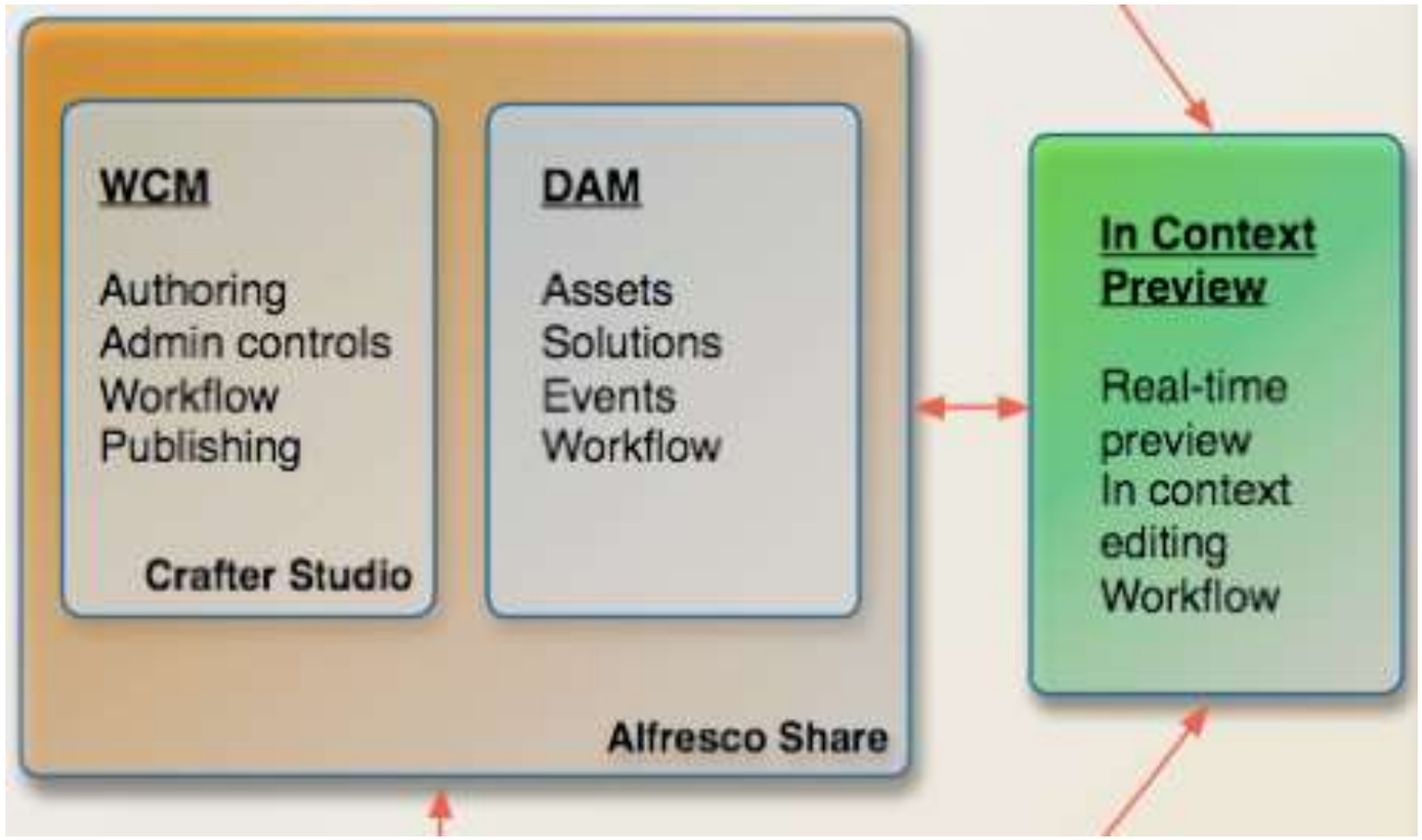
- Versioning and locking
- Workflow and approvals
- Content modeling - metadata & file/folder structures for comprehensive taxonomy to find content
- Automatic metadata extraction - makes uploading and categorizing files easier
- Security model – granular control on files providing specific access levels
- Content agnostic
  - Web content (XML, images, CSS, Javascript, etc.)
  - Digital assets (rich media)
  - Documents

Marketing Center – Solution Detail

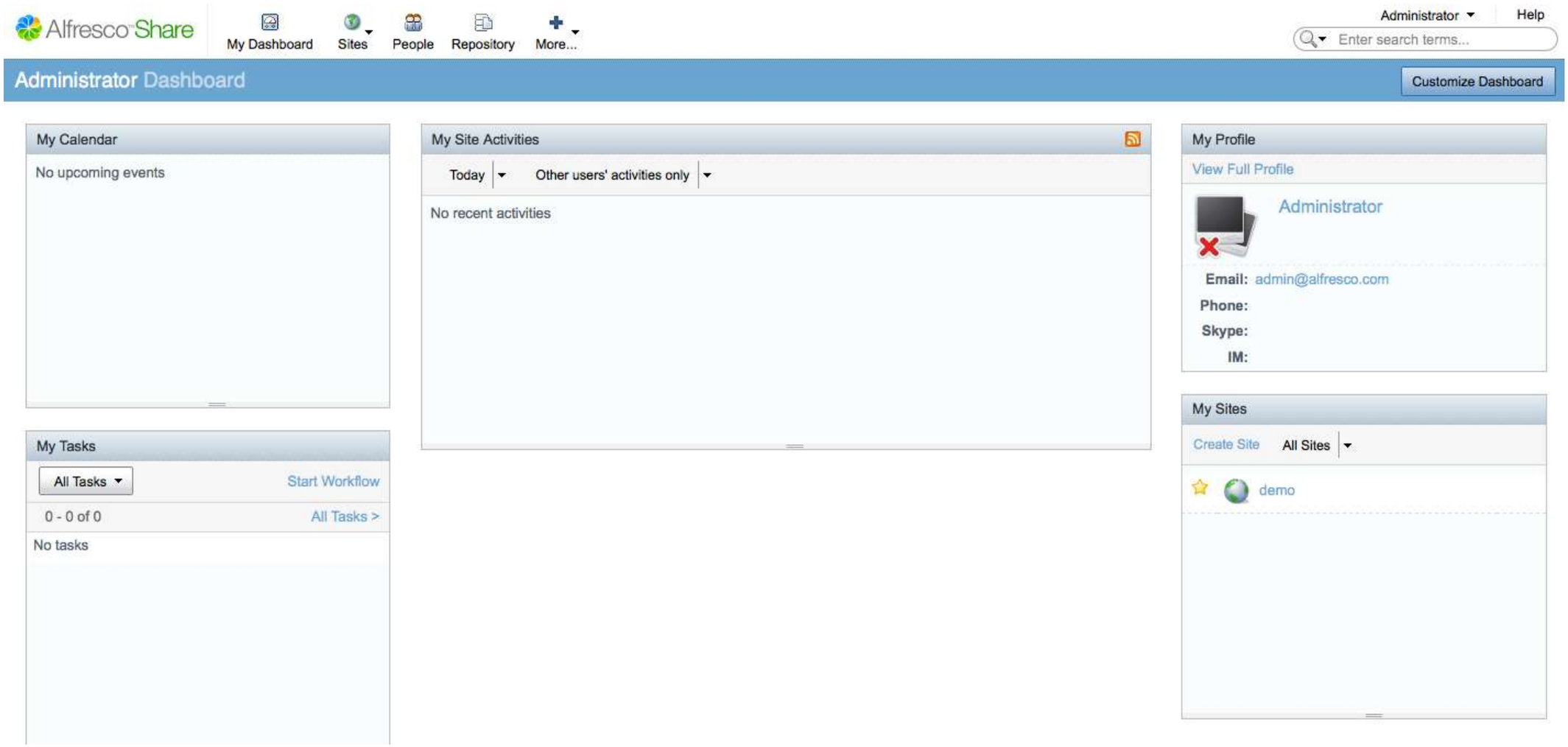


Marketing Center - Content Authoring and Management

CRAFTER STUDIO



Marketing Center - Content Authoring and Management



Crafter Studio – A plugin to Alfresco Share

Crafter Studio – Forms UI

New Page | Expand All | Collapse All

This is a Content Type Note. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nullam eros sem, mollis at venenatis id, suscipit vitae nunc. Suspendisse turpis quam, auctor vel vehicula in, ullamcorper et dui. In turpis lacus, commodo eget ornare sed, lacinia in est. Pellentesque orci mi, vulputat aliquet non tortor.

* Section Label 1 required field remaining

This is a Section Note. This example section shows all of the normal field styles that are avaialble. Nullam eros sem, mollis at venenatis id, suscipit vitae nunc. Suspendi auctor vel vehicula in, ullamcorper et dui. In turpis lacus, commodo eget ornare sed, lacinia in est. Pellentesque orci mi, vulputat aliquet non tortor.

Field Label ✓ Something was typed here. 0 / 50
This is a field note. (info)

Field Label * Select...
This is a field note. (info)

Field Label
0 / 500
This is a field note. (info)

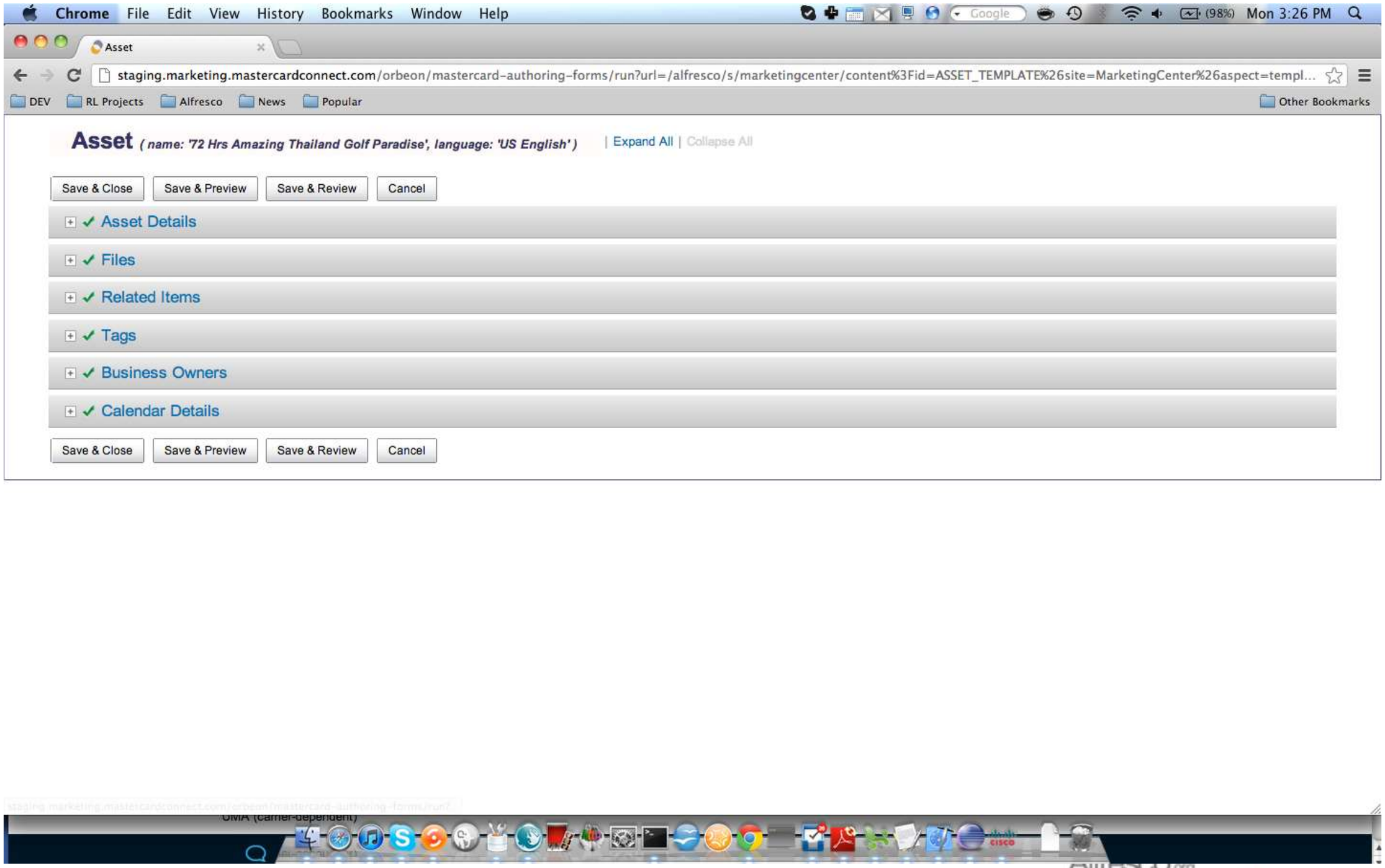
* Section Label 3 required fields remaining

* Section Label 5 required fields remaining

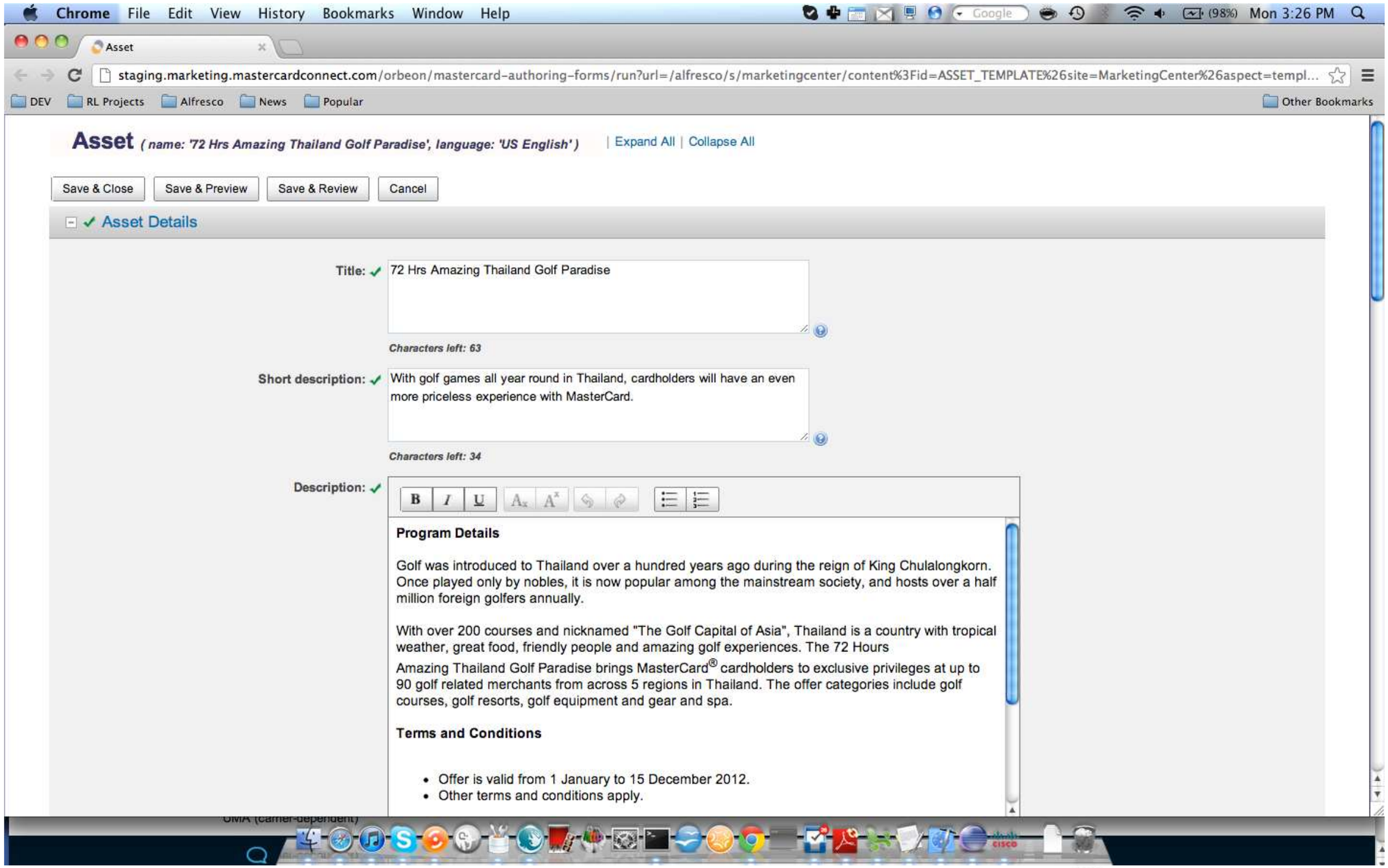
* Section Label 1 required field remaining

Save and Preview | Save and Close | Cancel

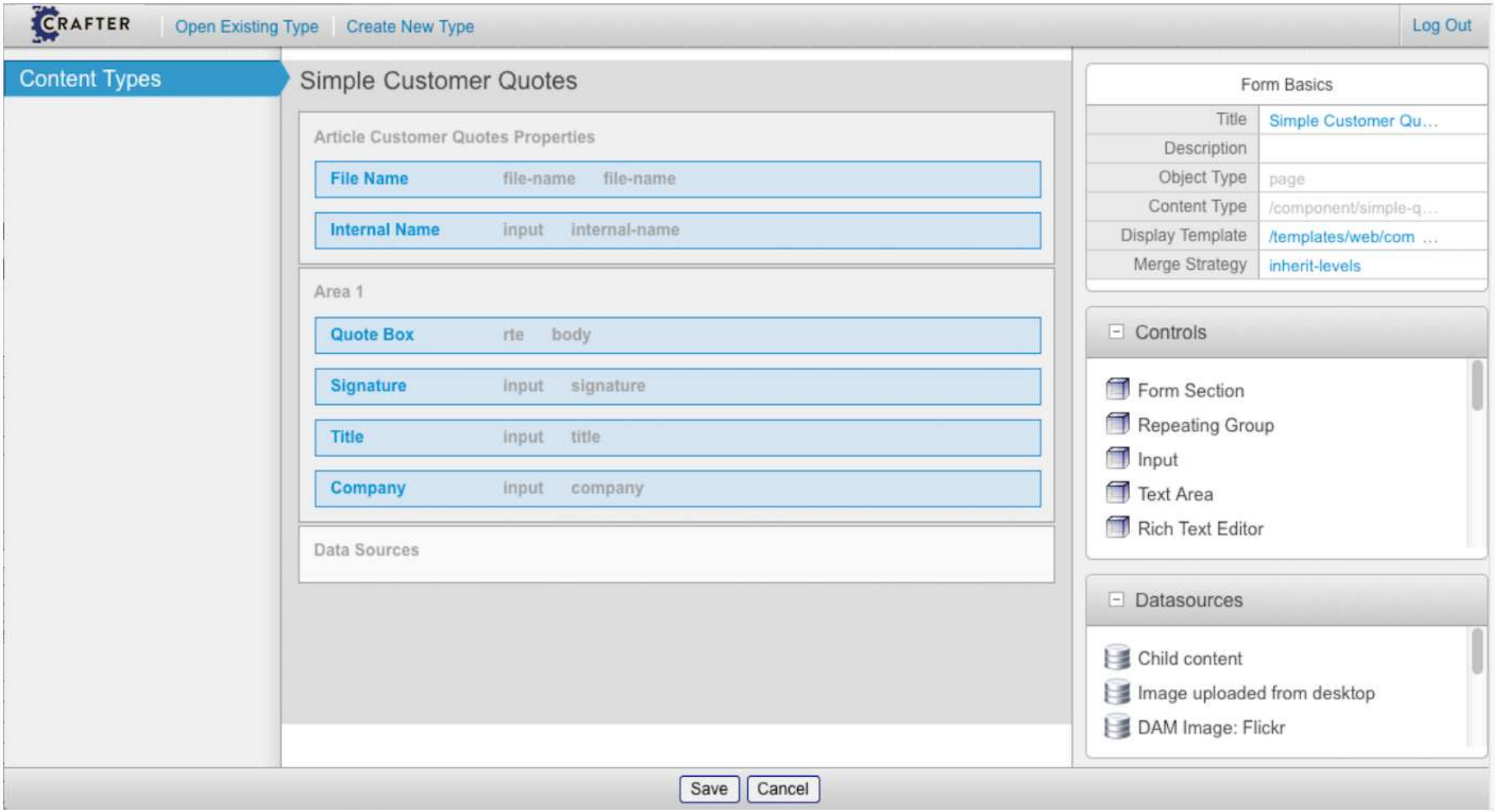
Marketing Center – Forms UI Example



Marketing Center – Forms UI Example



Crafter Studio – Content Type and Forms Definition



Crafter Studio – Rich Text Editor

Paragraph | Styles | B | I | HTML

Body

Lorem ipsum dolor sit

ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit augue duis dolore te feugait nulla facilisi. Nam liber tempor cum soluta nobis eleifend option congue nihil imperdiet doming id quod mazim placerat facer possim assum. Typi non habent claritatem insitam; est usus legentis in iis qui facit eorum claritatem. Investigationes demonstraverunt lectores legere me lius quod ii legunt saepius. Claritas est etiam processus dynamicus, qui sequitur mutationem consuetudium lectorum. Mirum est notare quam littera gothica, quam nunc putamus parum claram, anteposuerit litterarum formas humanitatis per seacula quarta decima et quinta decima. Eodem modo typi, qui nunc nobis videntur parum clari, fiant sollemnes in futurum.

ex ea commodo consequat

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit augue duis dolore te feugait nulla facilisi. Nam liber tempor cum soluta nobis eleifend option congue nihil imperdiet doming id quod mazim placerat facer possim assum. Typi non habent claritatem insitam; est usus legentis in iis qui facit eorum claritatem. Investigationes demonstraverunt lectores legere me lius quod ii legunt saepius. Claritas est etiam processus dynamicus, qui sequitur mutationem consuetudium lectorum. Mirum est notare quam littera gothica, quam nunc putamus parum claram, anteposuerit litterarum formas humanitatis per seacula quarta decima et quinta decima. Eodem modo typi, qui nunc nobis videntur parum clari, fiant sollemnes in futurum.

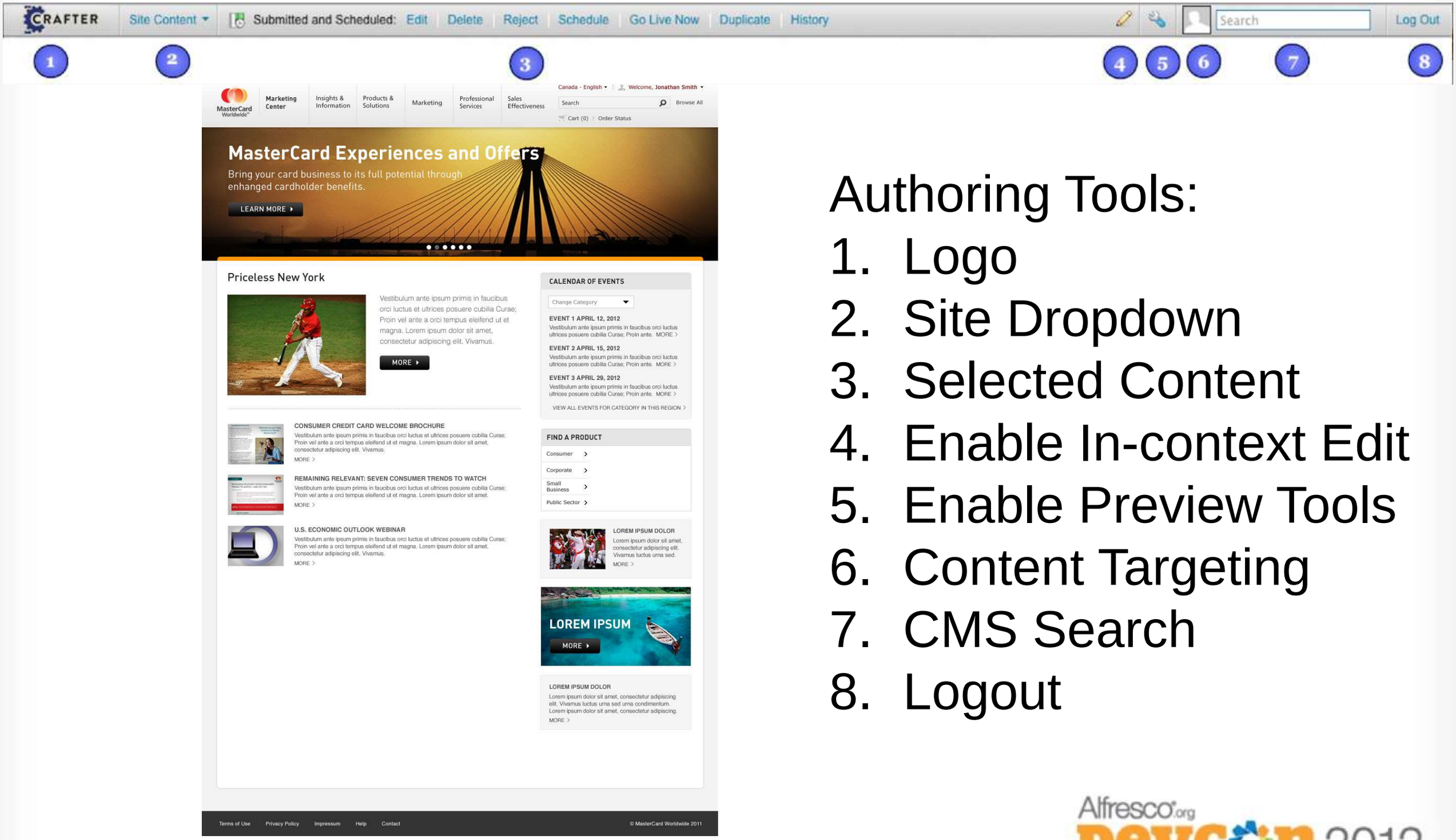
Lorem ipsum dolor sit amet

Consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit augue duis dolore te feugait nulla facilisi. Nam liber tempor cum soluta nobis eleifend option congue nihil imperdiet doming id quod mazim placerat facer possim assum. Typi non habent claritatem insitam; est usus legentis in iis qui facit eorum claritatem. Investigationes demonstraverunt lectores legere me lius quod ii legunt saepius. Claritas est etiam processus dynamicus, qui sequitur mutationem consuetudium lectorum. Mirum est notare quam littera gothica, quam nunc putamus parum claram, anteposuerit litterarum formas humanitatis per seacula quarta decima et quinta decima. Eodem modo typi, qui nunc nobis videntur parum clari, fiant sollemnes in futurum.

Path: p

4431 / 100000

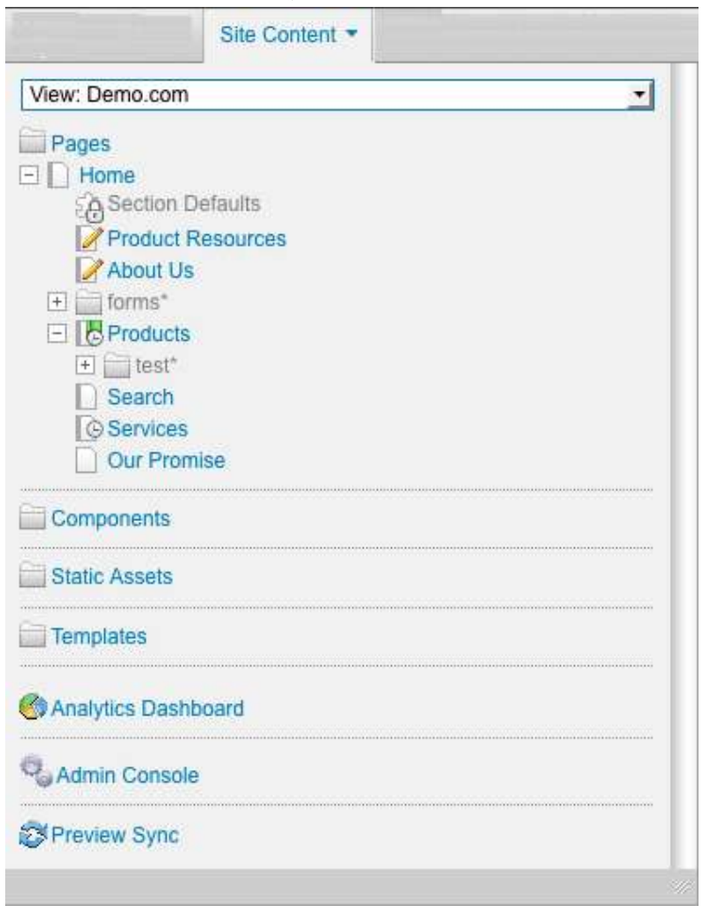
Crafter Studio – Authoring & Preview



Authoring Tools:

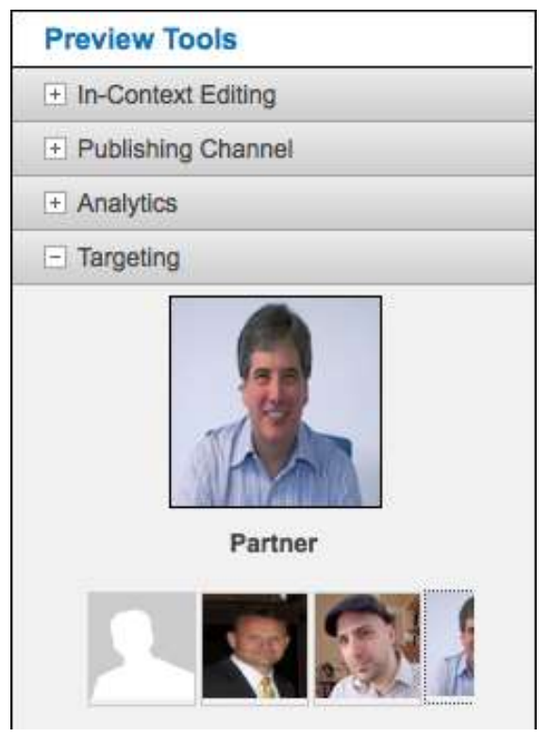
1. Logo
2. Site Dropdown
3. Selected Content
4. Enable In-context Edit
5. Enable Preview Tools
6. Content Targeting
7. CMS Search
8. Logout

Crafter Studio – Tool Detail



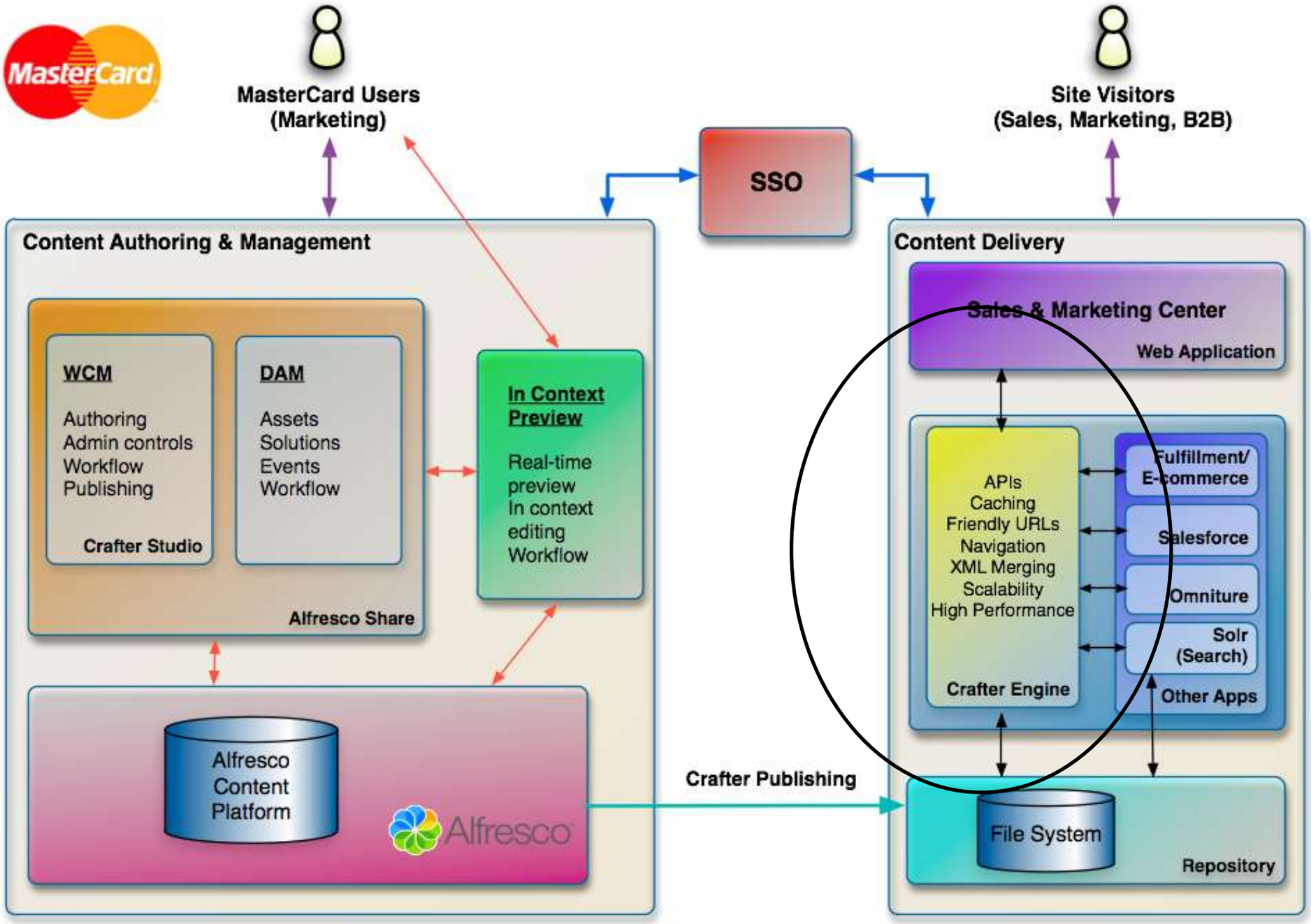
Site Dropdown

In Context Editing



Content Targeting

Marketing Center – Solution Detail

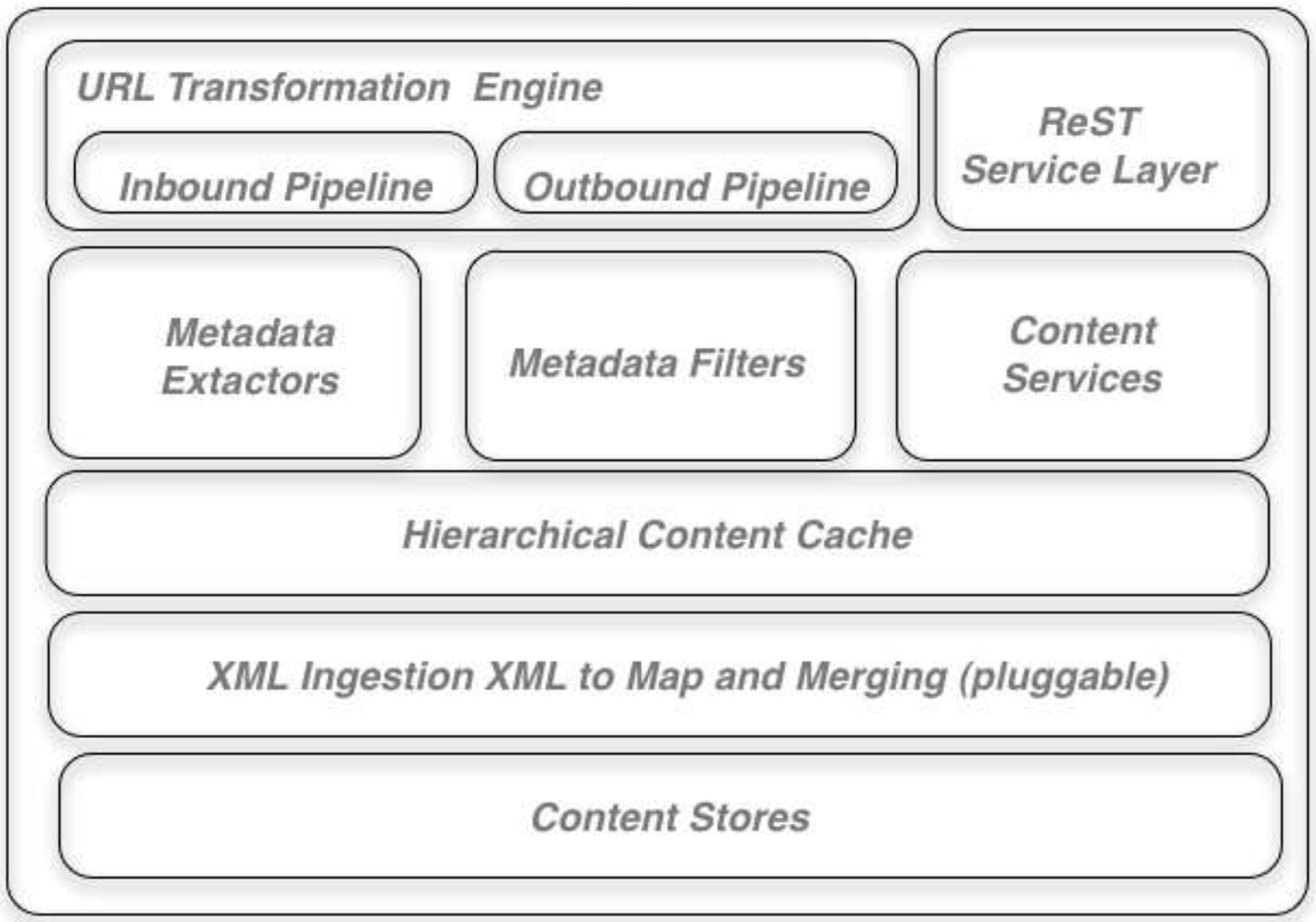


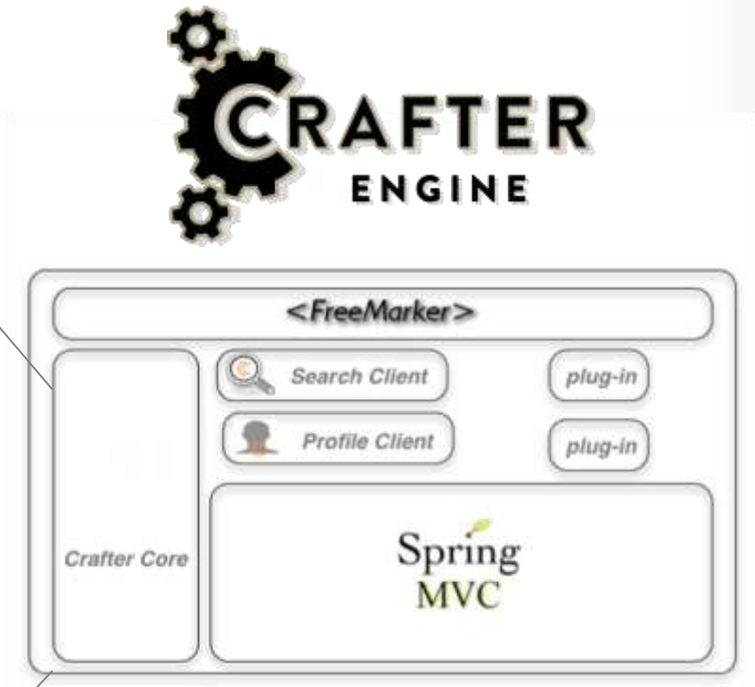
Marketing Center – Content Delivery

APIs
Caching
Friendly URLs
Navigation
XML Merging
Scalability
High Performance

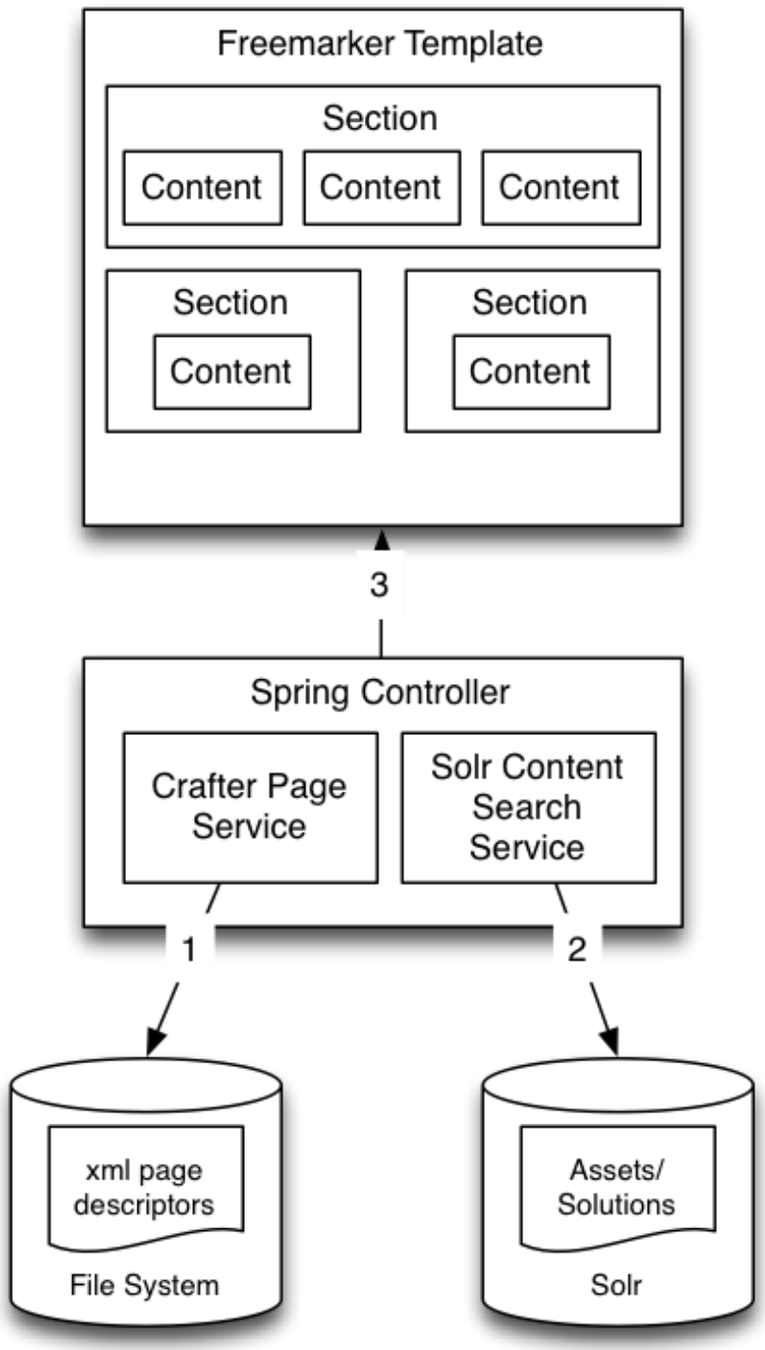
Crafter Engine

Crafter Core Architecture

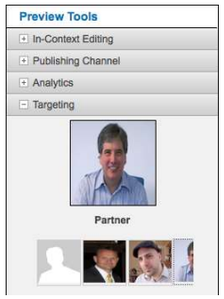


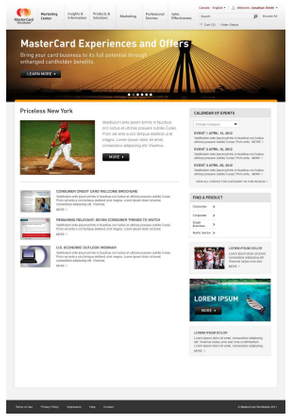


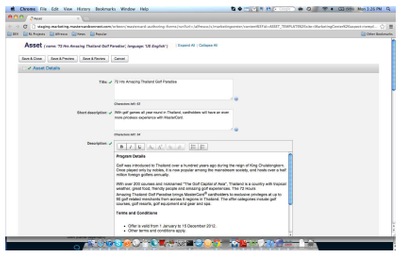
Marketing Center – Page Rendering

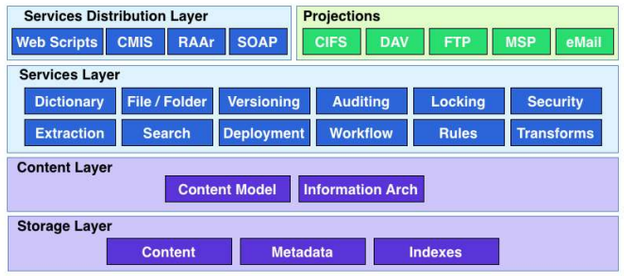


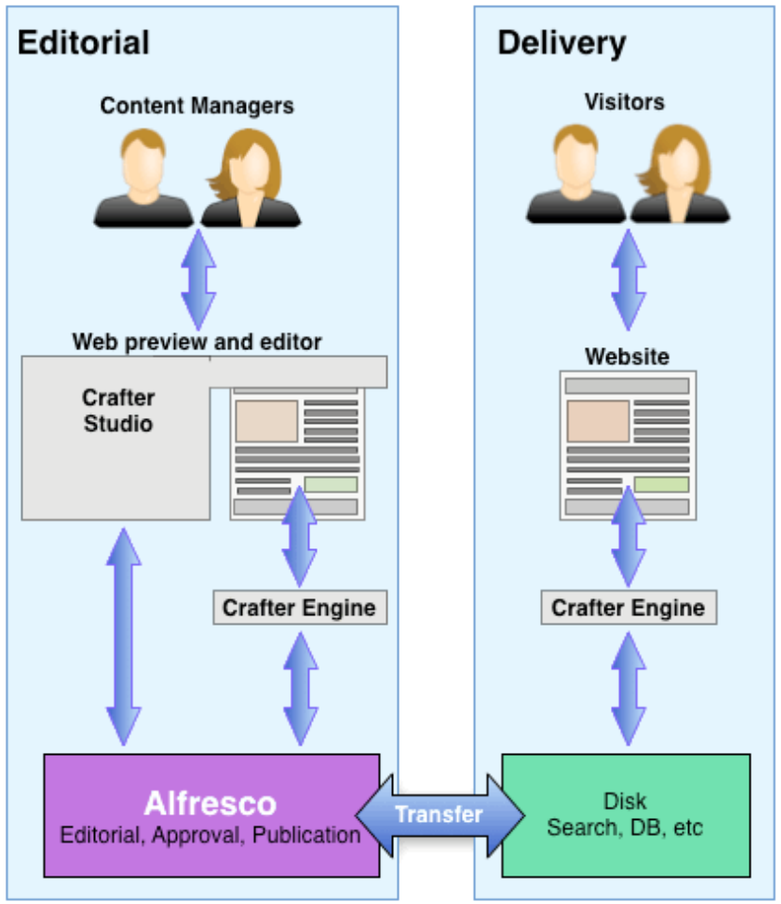
Solution Recap

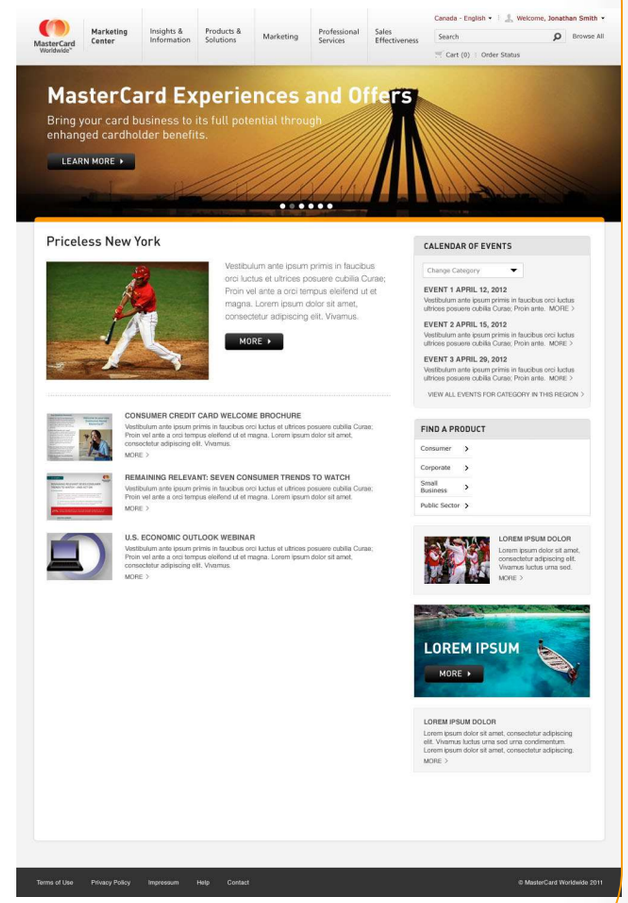




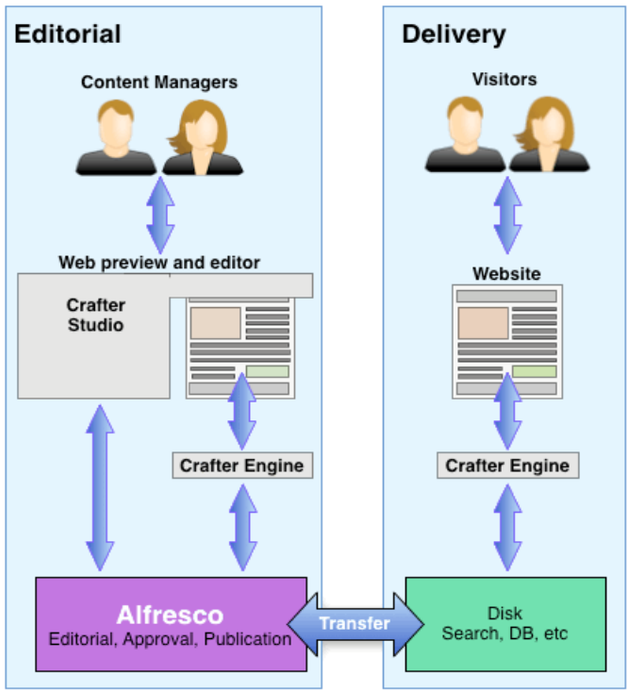


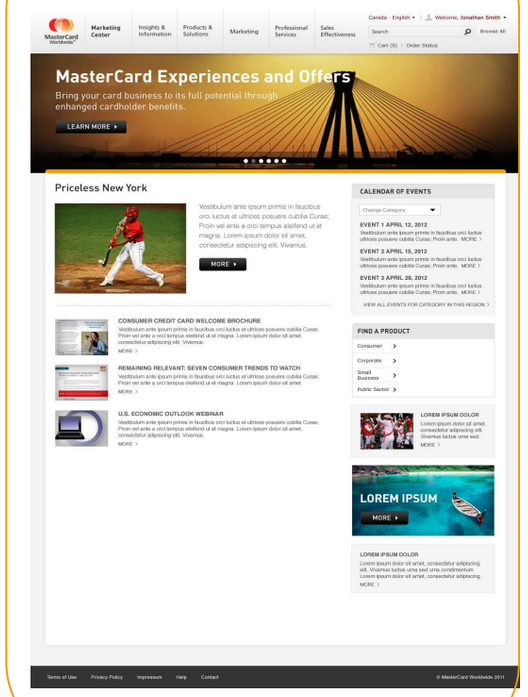






Solution Recap – Objectives Met





- Allow for non-technical business users to easily manage content
- Consolidate duplicated efforts
- Create common reusable components

- Deliver the right content, to right audience, at right time
- Scale to grow and connect with other systems

Lessons learned from experience

- Alfresco is still growing and improving as a company and solution
- Leverage Alfresco as a platform
- Not all vendors are created equal
  - Look carefully at real applications completed by the company you select
  - Beware of the “outsource” model
- Think beyond the front end when building applications
  - Authoring
  - Administration
- Make sure you have a detailed SOW

Q&A