

MasterCard Global Marketing Center A Crafter CMS and Alfresco Case Study

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





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



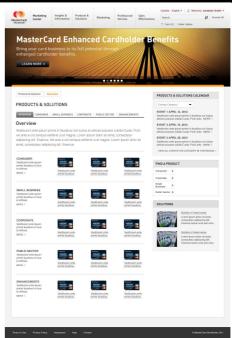
Marketing Center: Consolidation of Fragmented Sites

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 Alfrescoog



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)



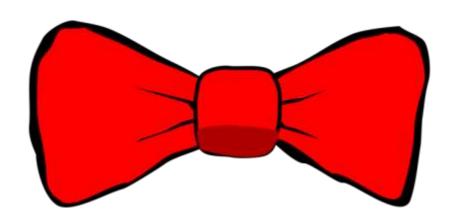
CMS Requirements (Authoring & Publishing)

- 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





Marketing

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Marketing

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Effectiveness



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CALENDAR OF EVENTS

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EVENT 2 APRIL 15, 2012

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EVENT 3 APRIL 29, 2012

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VIEW ALL EVENTS FOR CATEGORY IN THIS REGION >

FIND A PRODUCT

Consumer >

Corporate >

Business

Public Sector >



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MasterCard Worldwide 2011



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Marketing Center

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Effectiveness

Canada - English - : & Welcome, Jonathan A. Smith -

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Search









Previous / Next image (2 of 4)

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Event dates: Jan 14-15, 2012

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See All>

Segments: HNW, Mass Affluent, Youth

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See All>

INCLUDES:



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HEADLINE (SHORT)

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Segments: HTM, Mass Afford, Touth

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Marketing Center

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Marketing

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Sales Effectiveness

Canada - English - : & Welcome, Jonathan Smith

Search

Browse All

Cart (0) : Order Status





CONSUMER

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MORE >



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PRODUCTS & SOLUTIONS CALENDAR

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EVENT 2 APRIL 15, 2012

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VIEW ALL EVENTS FOR CATEGORY IN THIS REGION >

FIND A PRODUCT

Consumer > Corporate >

Business Public Sector >

SOLUTIONS



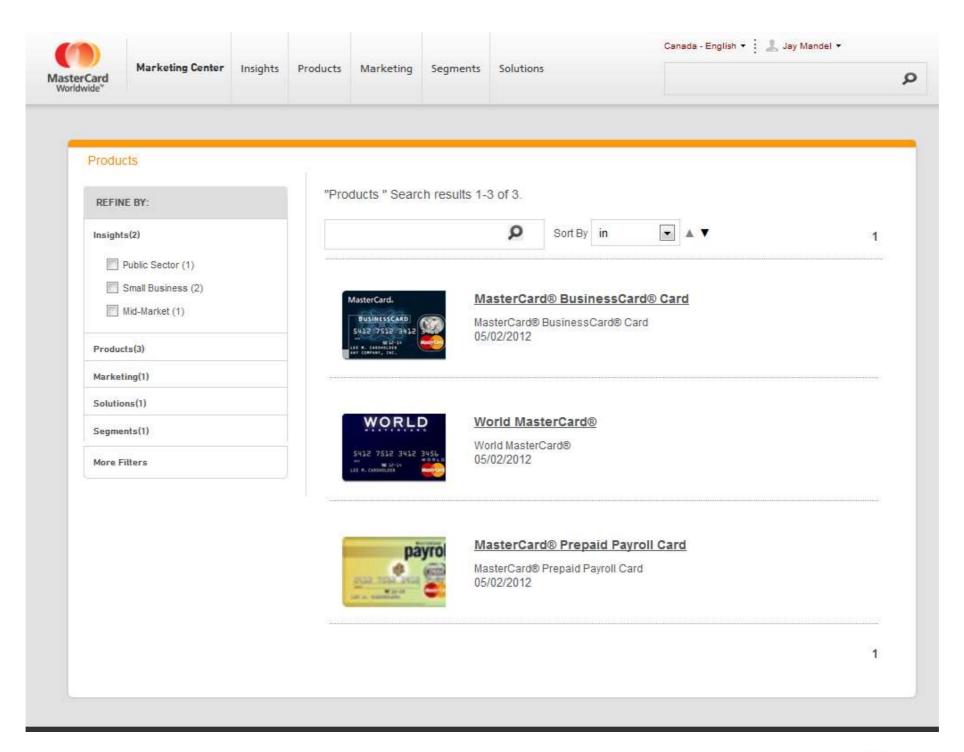
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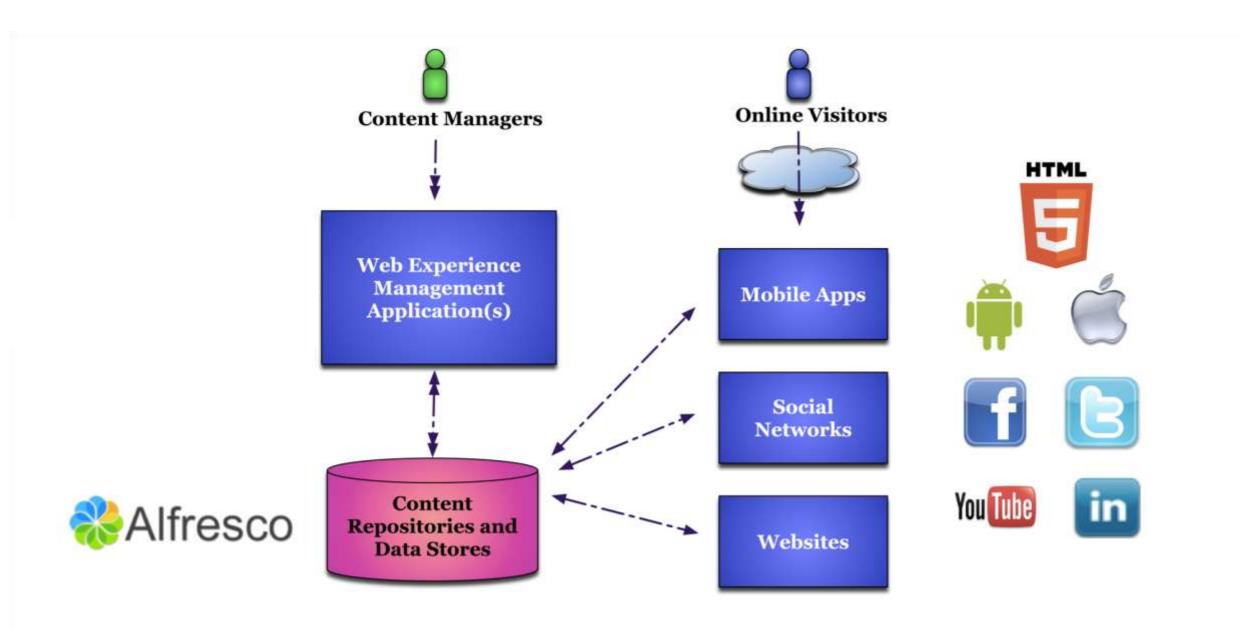


Faceted Search

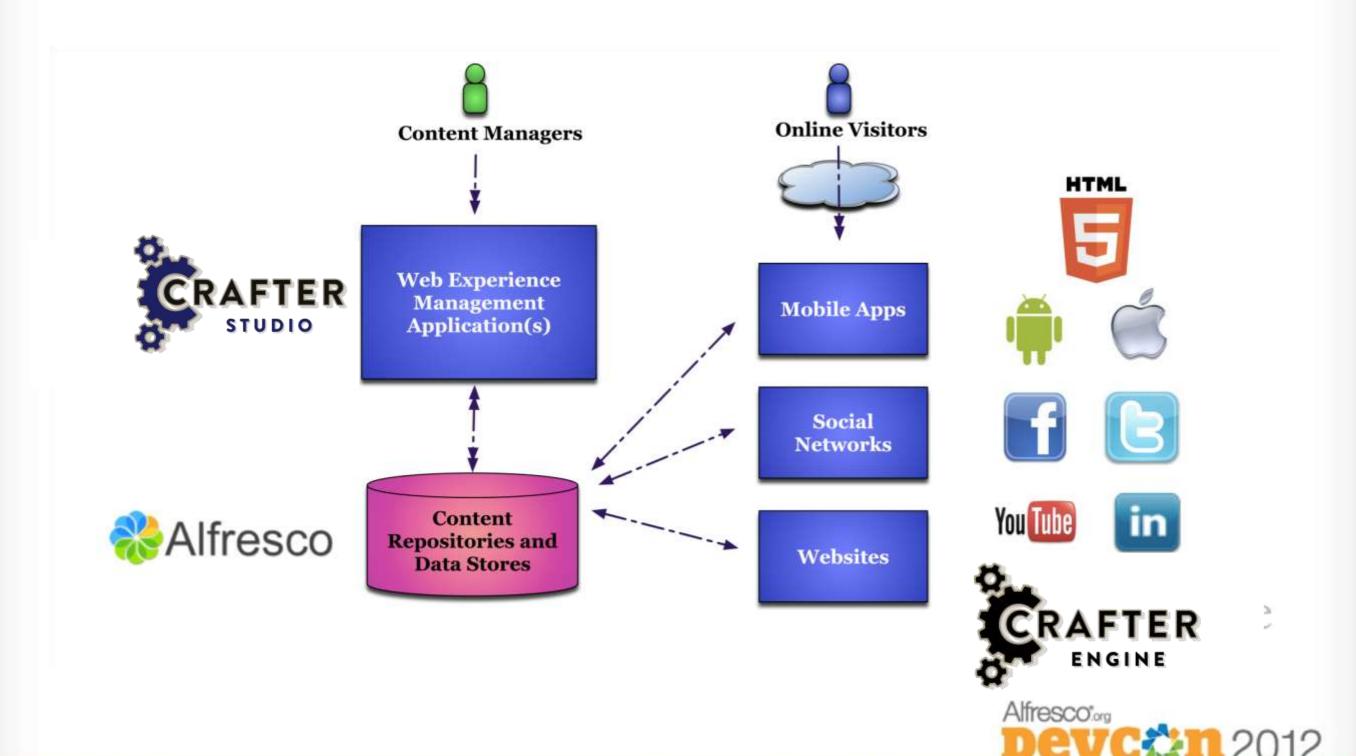




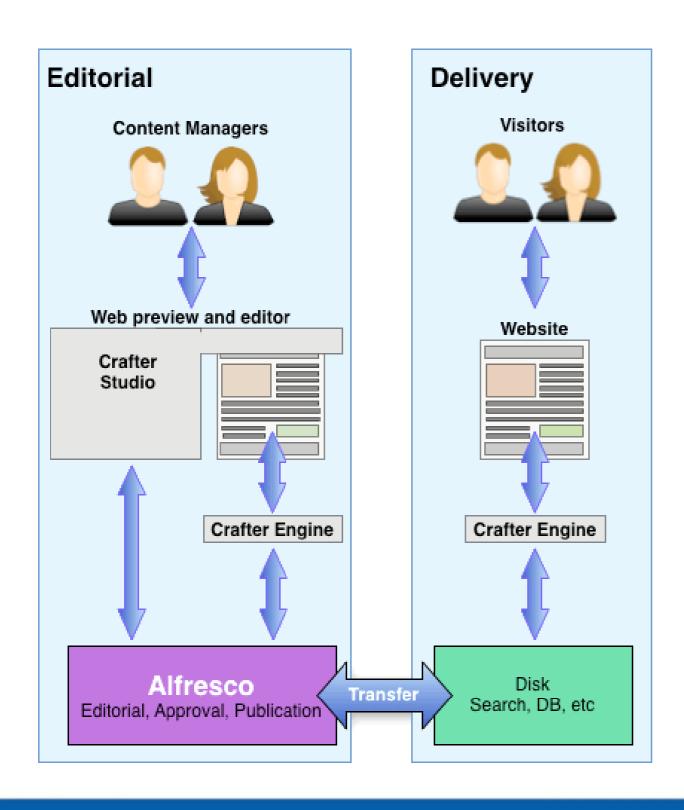
Alfresco Web CMS Solution Architecture



Alfresco Web CMS Solution Architecture



De-coupled Management and Delivery

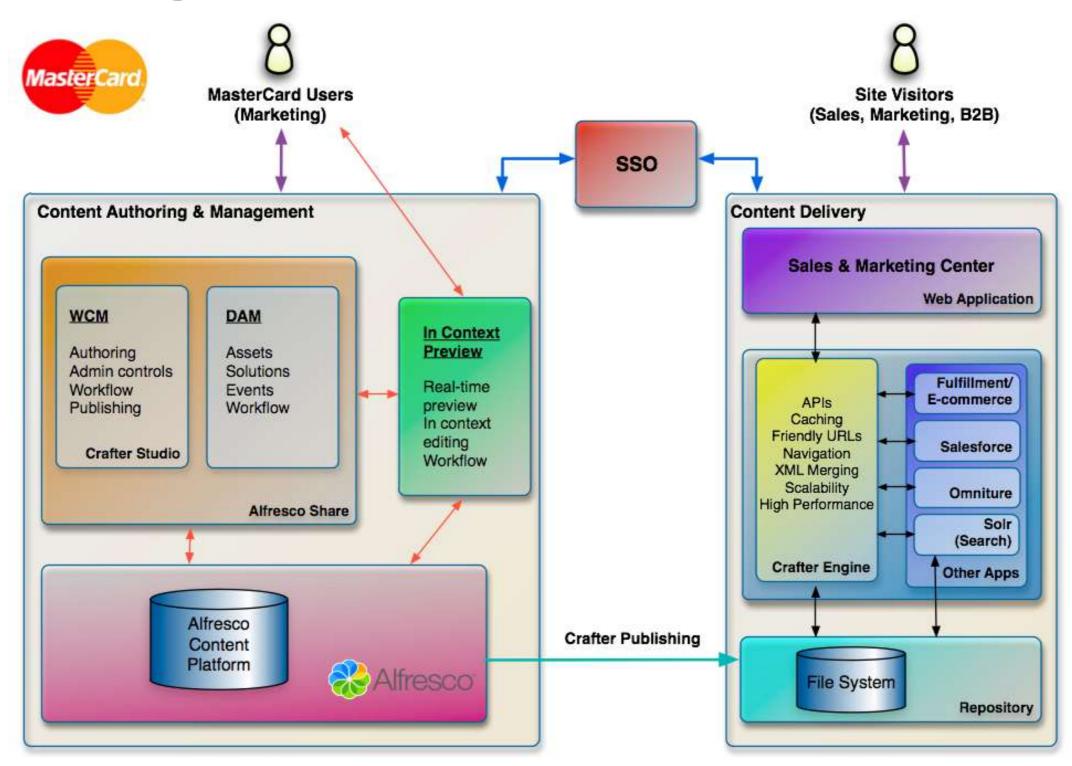


Why a de-coupled architecture?

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



Marketing Center - Solution Overview



Alfresco Content Platform



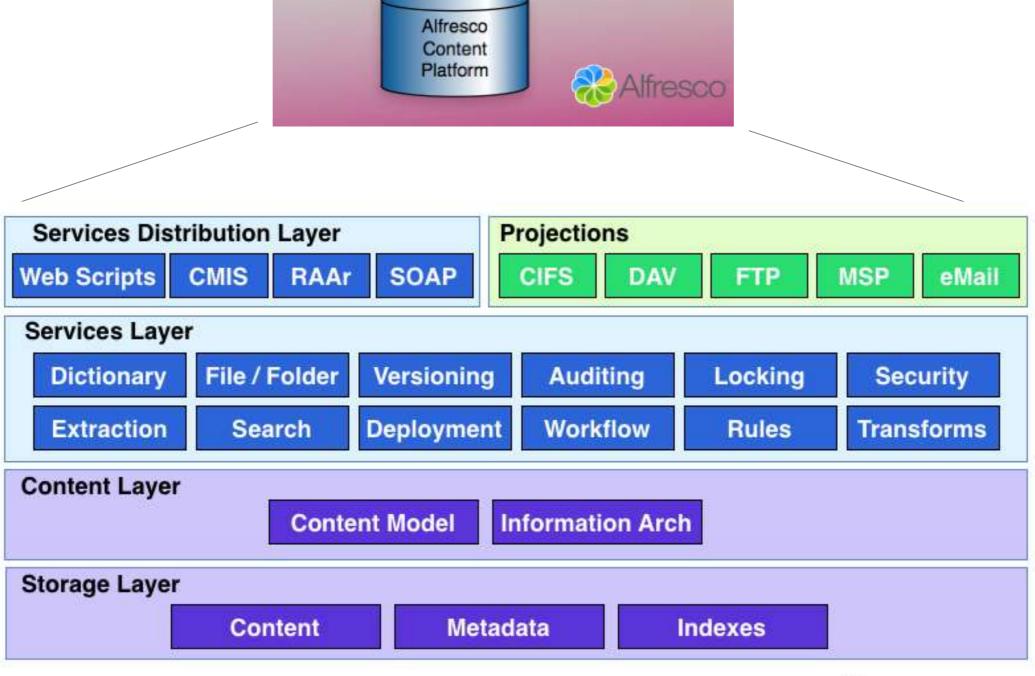
Services Distribution Layer

Services Layer

Content Layer

Storage Layer

Alfresco Content Platform



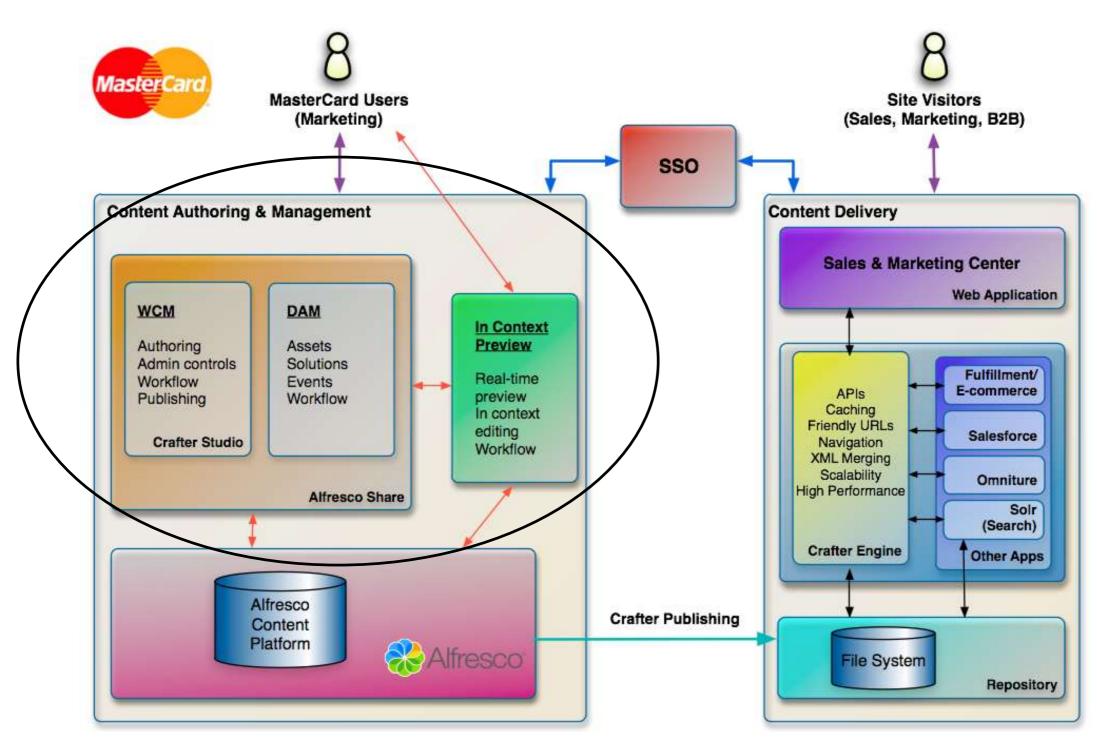


Key Alfresco Capabilities for the MasterCard Marketing Center

- 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

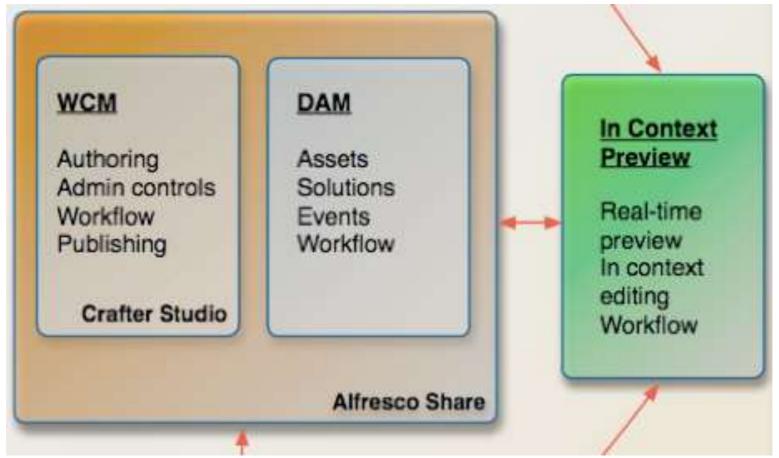


Marketing Center – Solution Detail

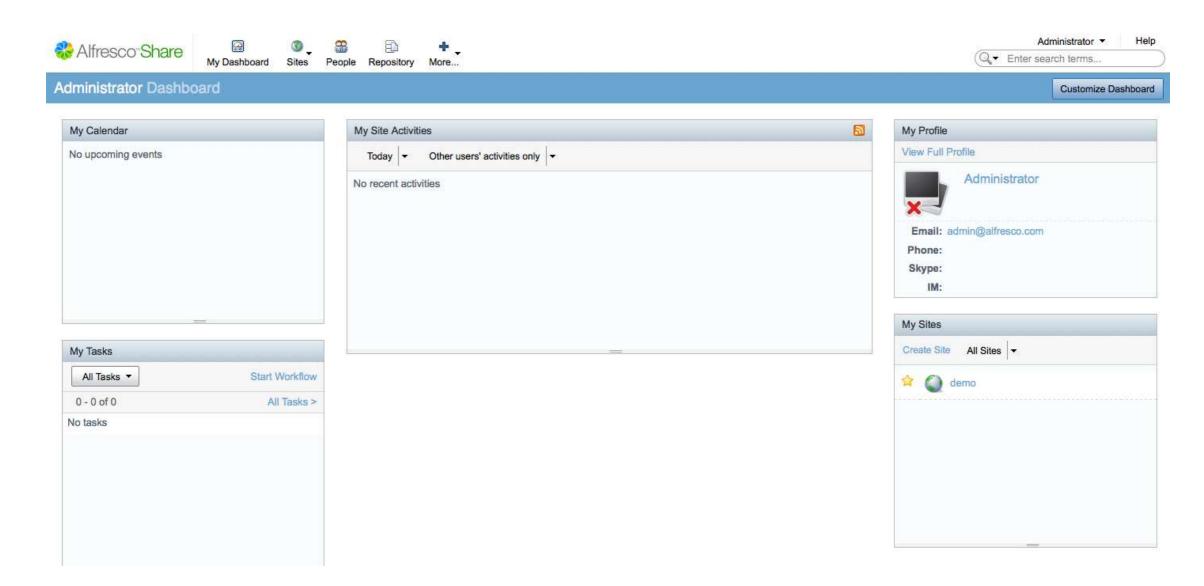


Marketing Center - Content Authoring and Management





Marketing Center - Content Authoring and Management



Crafter Studio – A plugin to Alfresco Share



Crafter Studio - Forms UI

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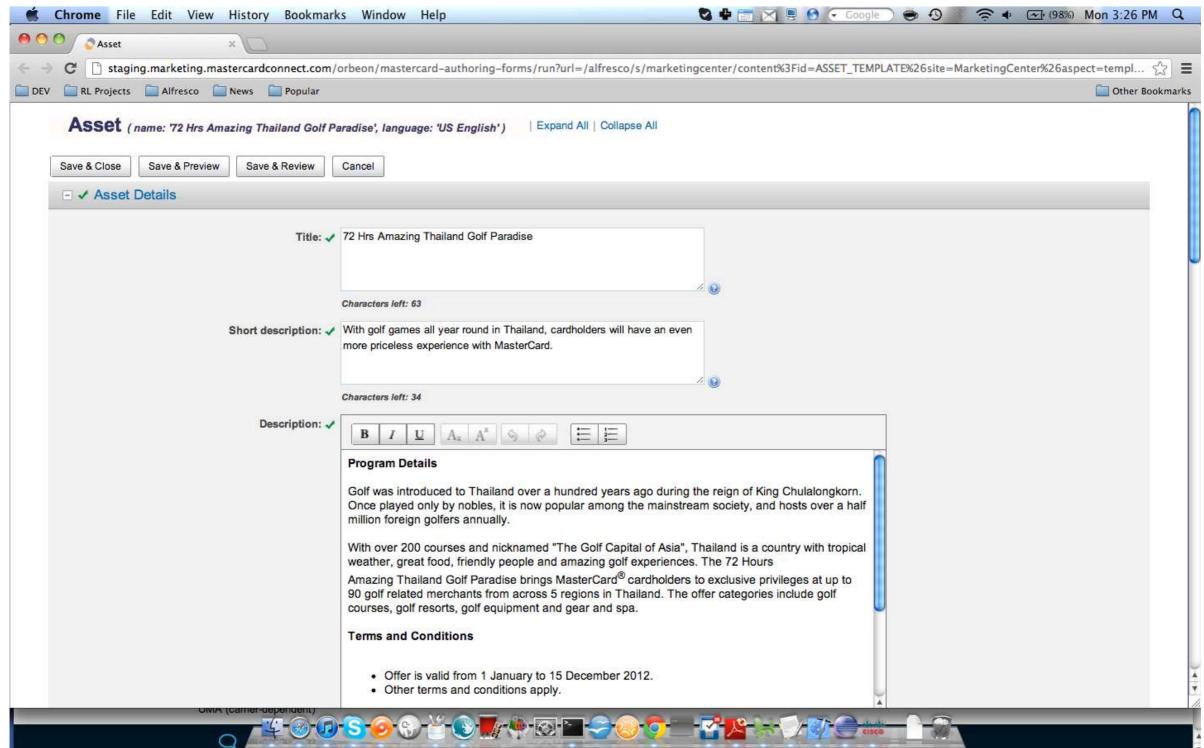
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Marketing Center – Forms UI Example



Marketing Center – Forms UI Example



Crafter Studio – Content Type and Forms Definition

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Crafter Studio - Rich Text Editor

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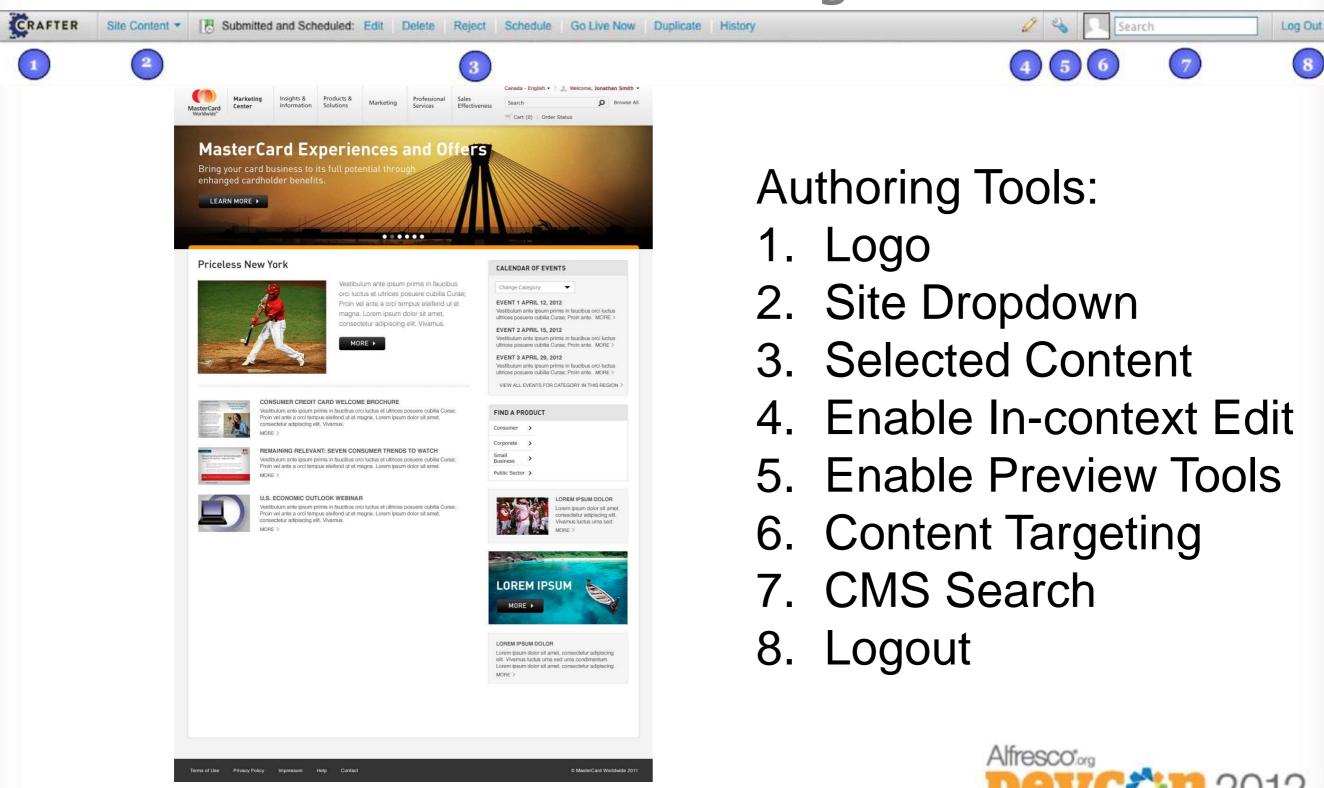
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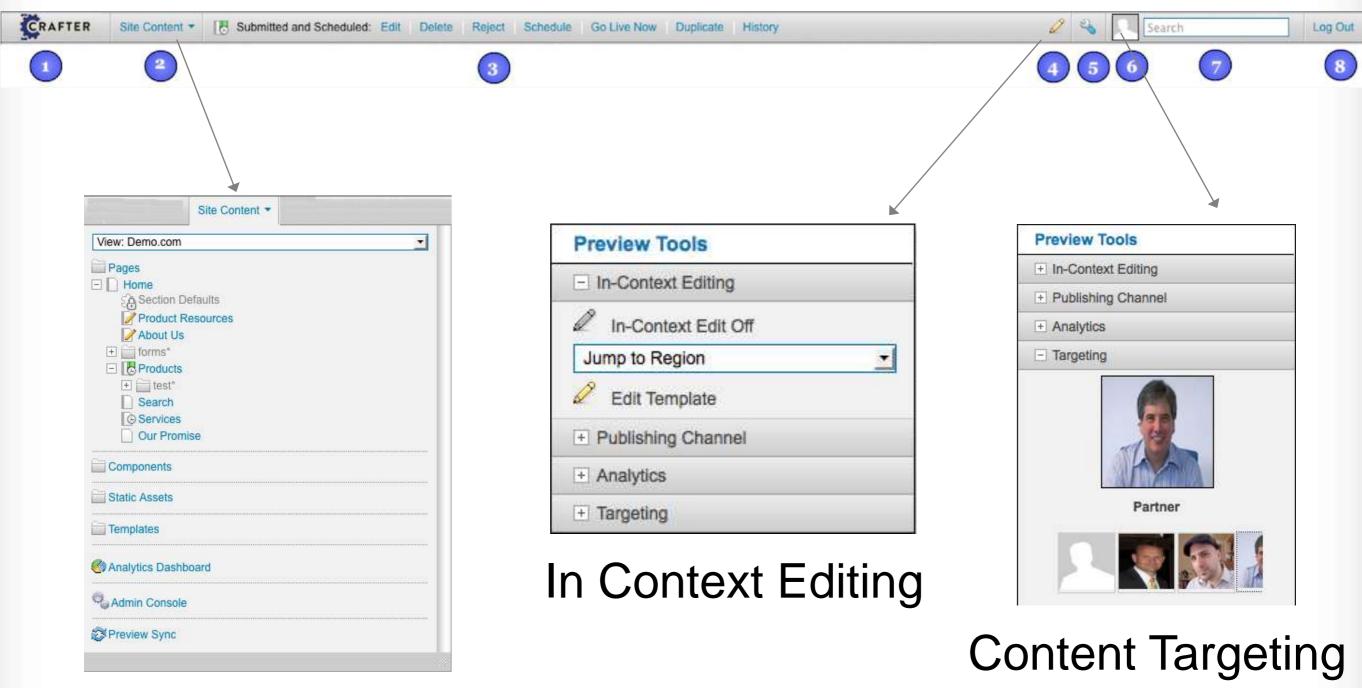
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Crafter Studio – Authoring & Preview



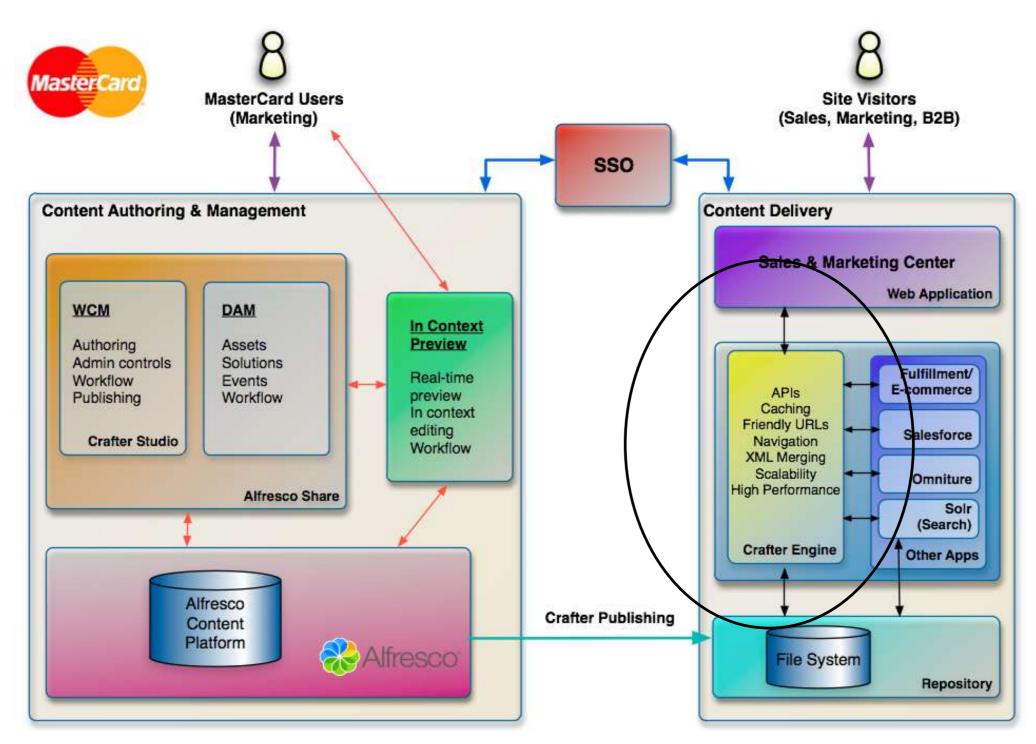
Crafter Studio - Tool Detail



Site Dropdown

Alfrescotorg
Devcan 2012

Marketing Center – Solution Detail

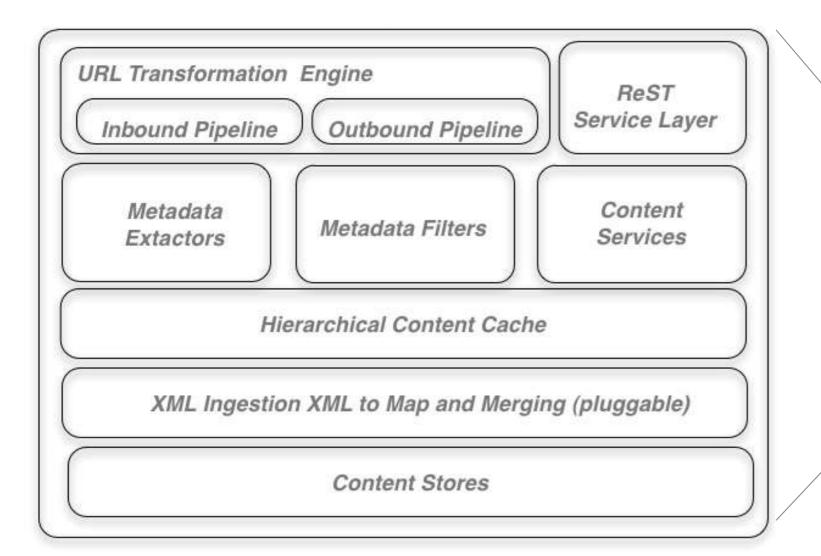


Marketing Center – Content Delivery

APIS
Caching
Friendly URLS
Navigation
XML Merging
Scalability
High Performance
Crafter Engine



Crafter Core Architecture

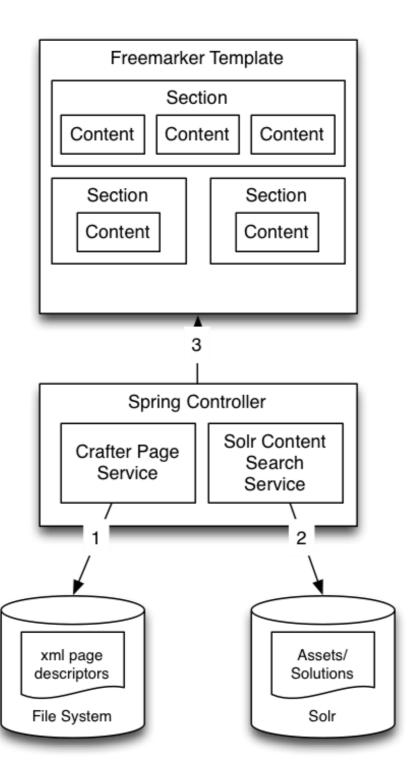






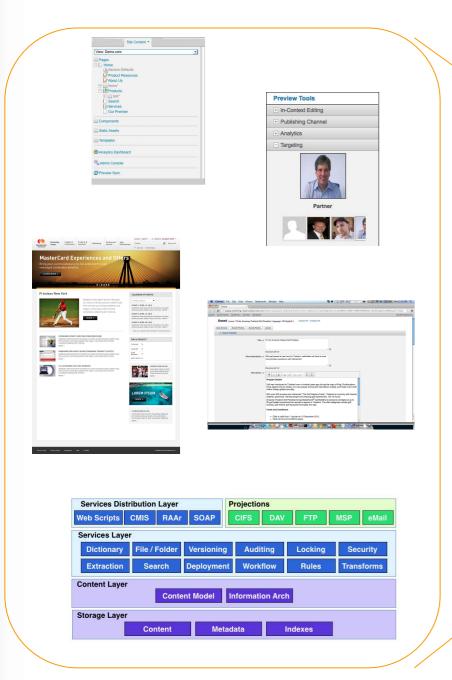


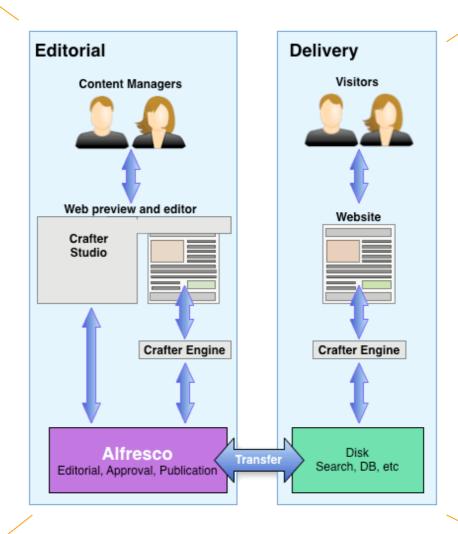
Marketing Center – Page Rendering

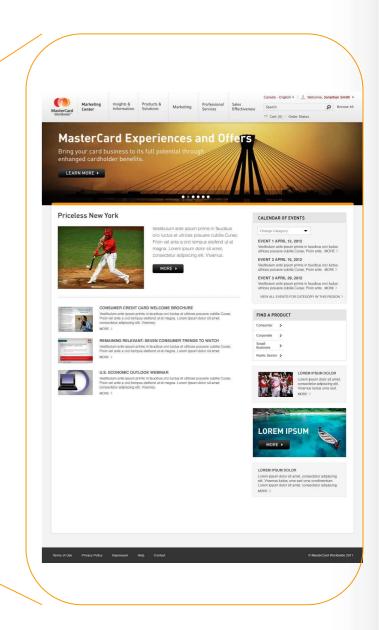




Solution Recap

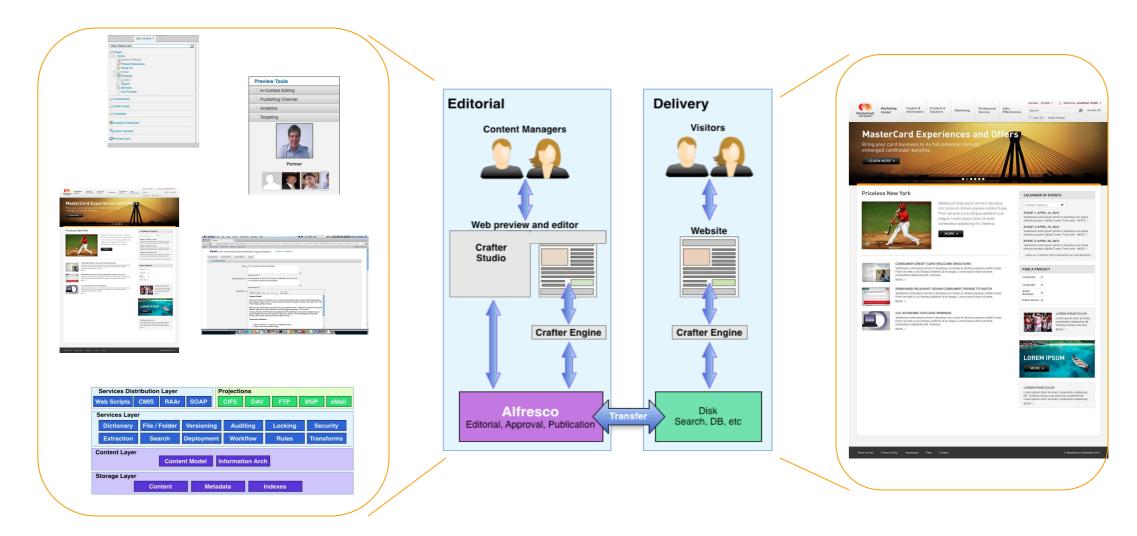








Solution Recap – Objectives Met



- 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