

March 11 & 12, 2018

Future Vision & Road-Mapping Work Session



ROBERT SANTORE
MAN RABBIT HOUSE, LLC

+



CAPITAL
GROUP

Objectives

Stage 1 Scoping & Content Review (Thursday 9-12pm)

1. Align on scope for Stage 1
2. Review and align on content targeted for redesign within scope of Stage 1

Design Review (Thursday 1230-130pm)

3. Finalize Digital Brand Expression

Future Vision Setting (Thursday 2-5pm)

4. Align on lens for prioritization (user
5. Align & detail uses cases to serve as illustrative representations of future vision solutions
6. Prioritize solutions corresponding to use cases

Roadmapping Worksession (Friday 8:30-11:30am)

7. Define and align on work streams for Stage 2 & 3
8. Identify required activities including known dependencies, owner, and estimated timing
9. Roadmap plan for execution of Stage 2 & 3 work streams

Roadmap & Scope

Website Deployment Strategy

WORKSTREAM 1 Front-Door Redesign

Redesign the home page of all sites under existing architectures.

Visually refresh the design of prioritized key pages.

Awaiting feedback from review of scope detail on 12.20.17

Awaiting CG feedback on Roadmap and Stage 1 Inventory documents

WORKSTREAM 2 Unification & Visual Refresh

Consolidate existing sites into a unified site and single navigation.

Visually refresh and implement all pages leveraging an established style guide and pattern library.

CG dependencies needed prior to design kick-off, including consolidated IT system, CMS migration, new content development

WORKSTREAM 3+ Web Transformation

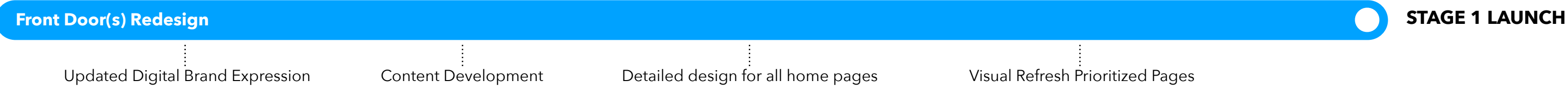
Define the pillars of the web transformation, using Advisory as the lens.

Design and implement transformative features of the vision, aligning with business objectives and digital initiatives.

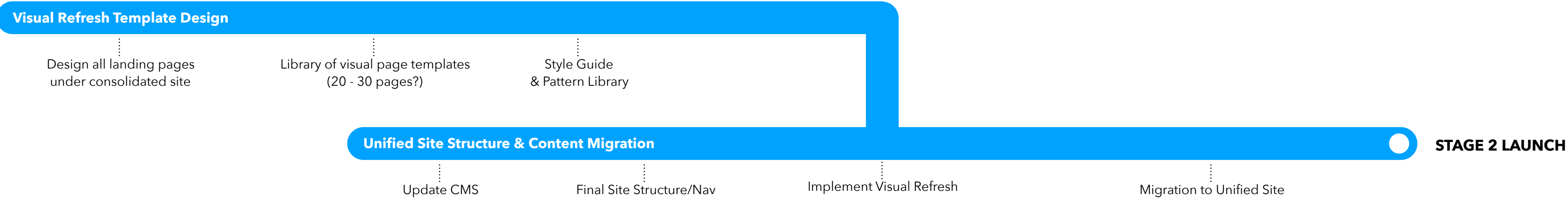
Need to align on approach and prioritization of initiatives

Workstreams & Deployments

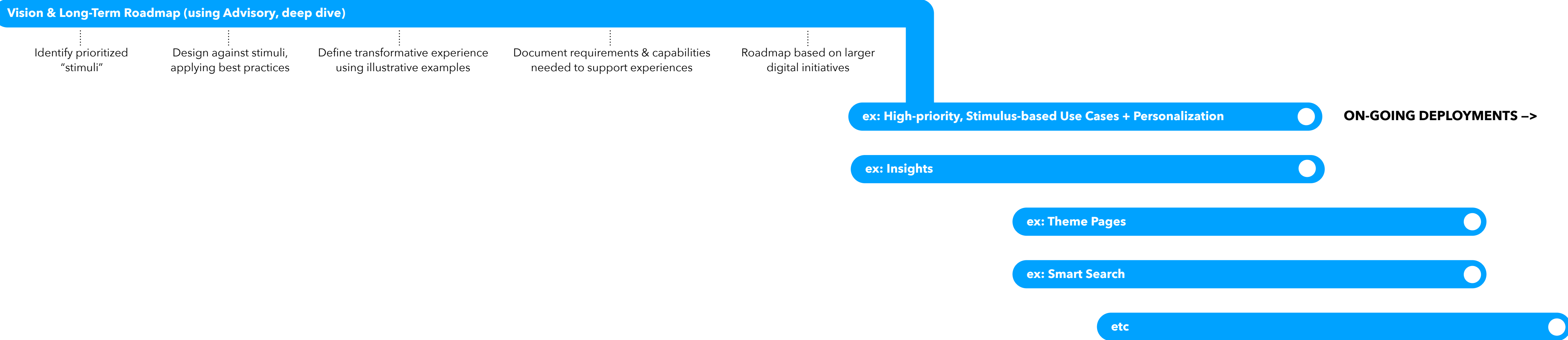
WORKSTREAM 1 - FRONT DOOR REDESIGN



WORKSTREAM 2 - UNIFICATION & VISUAL REFRESH

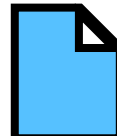


WORKSTREAM 3 - VISION & WEB TRANSFORMATION




Workstream 1 Scope

CAPITAL GROUP FRONT DOOR

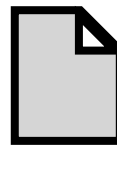
 **CG Home Page**
CapitalGroup.com
merge worldwide + institution

 **AF Home Page**
AmericanFunds.com

 **Our Services**
<https://www.capitalgroup.com/our-services.html>

 **Our Approach**
<https://www.capitalgroup.com/our-approach.html>


 **Capital Advantage**
https://www.capitalgroup.com/our-approach.html#stop_1

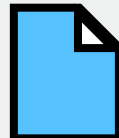







 **Our Company**
<https://www.capitalgroup.com/our-company.html>

Refresh both Capital Advantages?
<https://www.capitalgroup.com/our-approach.html>
<https://www.americanfunds.com/advisor/insights/the-capital-advantage.html>

Capital System / Our Process

FINANCIAL ADVISORS

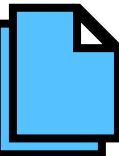
 **Home Page + Destination Pages**

<p>Investments</p> <p> Investment Landing https://www.americanfunds.com/advisor/investments</p> <p> Fund Finder + Fund Detail Pages TBD</p>	<p>Primary Site Section Pages</p> <p> Insights Landing with Capital Ideas incorporated</p> <p> Forms & Literature</p>	<p> Products / Products & Solutions / Client Solutions</p> <p> Search Results</p>	<p> Planning / Tools & Practice Management / Events</p> <p> Login</p>
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INSTITUTIONS & CONSULTANTS

 **Home Page + Destination Pages**  **DB LDI**

INDIVIDUAL INVESTORS


 **Home Page + Destination Pages**


EMPLOYERS & PLAN SPONSORS

 **Home Page**

THIRD-PARTY ADMINISTRATORS

 **Home Page**

 **Fixed Income + Detail Page**
<https://www.americanfunds.com/advisor/products/fixed-income.html>

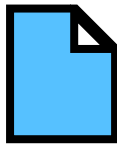
 **Our People/ Portfolio Managers**

 **Advisory -> Portfolio Construction**
<https://www.americanfunds.com/advisor/products/portfolio-construction.html>


+ Analytics Service (?)
*NEW

 **Portfolio Construction Tool**
*NEW



 **Model Portfolios**
*NEW

 **Retirement -> Defined Contribution**
<https://www.americanfunds.com/advisor/products/defined-contribution.html>

 **Dream Chart**
Investments - marketing page

 **Campaign Landing Pages Template**
ex: TDF
Examples serve as a guideline and standardization for future campaign landers (email capture, subscription, etc.)

Legend

-  **Re-Design** - completely reworked to reflect business priorities and user insights
-  **Re-Skin** - visually updated to reflect the new design language. Utilize existing content.

Assumptions

- PCS, PM, Canada, Europe, Asia are out of scope
- Leverage existing site architecture
- Capital Ideas pages will remain as-is
- Not accounting for new campaign landing pages
- Phase 1 Scope does not correspond to current IA SOW

Workstream 2 Scope

1. New Information Architecture for all US sites (nav, footer, site selector)
 - Content development: net new, refactoring, retiring, taxonomy/tagging, audience analysis
 - Business Priority:
 - Tier 1: Capital Ideas and Insights, Advisor, Institutional, Investor
 - Tier 2: RIA, RP, Servicing reskin
 - Tier 3: PCS and Private Market
 - Capabilities
 - Segmentation (targeting, not “personalization”)
 - Analytics (i. tablestakes + ii. future for lead gen, sophistication)
 - SEO (configuration for search engines and optimization)
2. Domain Consolidation. Fold AF domain under CG domain. CG is now primary domain
 - AF.com will live for redirect purposes. Redirect to CG
 - Capitalideas.com will live for redirect purposes. Redirect to CG
3. Advanced site search (faceted search)
4. Logins (getting users to the correct login. primarily UX/Design)

Notes

- One team assigned to each workstream
 - Workstream 1 = 1 team?
 - Workstream 2 = 1 team?analysis on universal vs audience specific pages. ex: Fund detail page
- Organization and change management/ approvals, legal, change management, maintain content in multiple places, etc.

Approach / Sequencing

- Team to develop approach and sequencing

Roles & Resourcing

1. Content
 - Authors
2. Design (4 total. final mix tbd)
 - UX designer x 2
 - Visual designer x 1
 - Production designer x 1
3. Technology
 - DEV x 5
 - QA x 2
 - SE x 1
4. BA
5. Insights & Analytics
6. Shared/Oversight/Misc
 - 1 Design director

Workstream 3 | Capabilities

- Registration
- subscriptions
- Briefcase
- marketing lab
- Titan
- Segmentation / personalization
- Improved search
- Showcase portfolio managers
- Enhanced contact-us
- Content playlist
- Micro surveys / polling
- Migrate / integrate webinars
- Lead generation
- Syndication
- Q&A
- Quick start: last viewed, most viewed, common tools
- Interactive data/charts visualizations
- Goal tracking / personalized benchmarks
- Service log-in

Stage 3 Roadmap Comprised of:

- Tablestake business needs
- Existing Capital Group roadmap
- NGM research learnings

Workstream 3 | Capabilities

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Stage 3 initial priorities:

- GREEN - stage 3 first priorities
- BLUE - Already assigned to another team. We define the functional & design specs, they build

Workstream 3 | Capabilities

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Next steps:

- Align on advisory use cases (or other strategic lens) to guide strategy for design & development of prioritized capabilities. Define goals.
- Scope prioritized capabilities

Registration

- **ID mapping**
- **profile management**
- **user preferences**
- Single sign-on
- Need to define: once a user registers, what do they get?
 - Access
 - semi-secure content

GREEN - stage 3 first priorities

Subscriptions

- **need centralized place to manage this (part of the profile)**
 - **dependent upon Registration work**
 - **was started in the Identity Management project. All of the user experience flows have been mapped out**
- **TBD - Diversified subscriptions: by product / topic / thought leader**
- **CG view to see user subscriptions (currently fragmented by solution)**
- **staying away from Investor-related stuff for now**

BLUE - part of RIA work

Briefcase

- **Content favorites/bookmarks**
- **multiple-format**
- **Outputs from tools/services, needs architecture to be connected to the tools**
- **sharing/export capabilities**

BLUE - part of RIA & Digital Prospecting work

Marketing Lab

- **white labeling**
- **modularizing**
- **sharing/export capabilities**
- **note: heavy legal/compliance considerations**

Titan

- investment-vehicle research capabilities
- needs to be picked up from existing team
- naming & design patterns prototype is being socialized internally
- could be implemented faster?

GREEN - stage 3 first priorities

Segmentation / personalization

- *needs separate scoping discussion*
- technical capability
- front end experience strategy
- firm-specific segmentation (high priority)
- segment-specific messaging targeting

Improved Search

- Improved search
 - Workstream 2 will have improved search results
- cognitive, concept-based search (not keyword), e.g. fixed income = bond
- natural language
- user preferences
- **chat bot (should be elevated as its own capability, not folded into search)**

BLUE - part of Digital Prospecting work

Showcase portfolio manager

- **How we market PMs on the site**
- **more transparency - profiles, history, etc**
 - **transparency in investment data, related to Titan work**
 - **existing transparency effort is happening in relation to reporting**
 - **note: there will be heavy compliance/legal considerations**
- **humanized**
- **scalable accessibility**
- **virtual PM**

GREEN - stage 3 first priorities

Enhanced contact-us

- **advisor to wholesaler; multiple channels, based on user preferences, self-service scheduling**
- **Chat bot as virtual wholesaler**

BLUE - part of Digital Prospecting & Tele-territories work

Content playlist

- **curated content sourced from CG and outside parties**
 - **has legal/compliance considerations re: outside content**
- **customize based upon interest**
- **crossover with other capabilities: marketing lab, wholesalers, etc**

BLUE - part of Digital Prospecting work

Micro surveys / polling

BLUE - part of Digital Prospecting work

Syndication

- content & tools
- offsite CG, distributed value
- **outside content curation**
- widgetize tools

BLUE - part of Digital Prospecting work

Migrate / integrate webinars

Lead generation

- set business rules
- connected to many other streams: registration, subscription, site behavior, etc
- Tied to analytics (setting up in stage 2)

Q & A

- Q submission, CG response
- Access to authors

Quick start

- last viewed
- most viewed
- common tools

Interactive data/charts visualizations

Goal tracking / personalized benchmarks

- last viewed
- most viewed
- common tools

Service log-in

- improved way finding
- Retirement plan finder for participants

Longer term: Single view of customer

- *CG book of business views*
- *unified communication across audiences (case management)*
- *customer facing & business facing*

Chat Bot

- Digital prospecting working on some of this

-

- -



- **Registration, ID mapping, profile, preferences**
 - Single sign-on
- **subscriptions - RIA**
- **concept formally known as briefcase - RIA**
- **Content; favorites/bookmarks, multi-format**
- **Tools; outputs from tools/services, needs architecture to be connected to the tools**
- **export capabilities**
- **marketing lab**
- **white labeling - RIA**
- **modularizing**
- **Titan, investment-vehicle research capabilities**
 - **some work has been done to define, needs to be picked up**
- Segmentation / personalization (needs separate scoping discussion)
 - technical capability
 - front end experience strategy
 - firm-specific segmentation (high priority)
 - segment-specific messaging targeting
- Improved search
 - cognitive, user preferences
 - **chat bot - DIGITAL PROSPECTING**
- Interactive data/charts visualizations
- **Showcase portfolio manager**
 - **more transparency, humanized, scalable accessibility**
 - **virtual PM**
- **enhanced contact-us - DIGITAL PROSPECTING**
 - **advisor to wholesaler; multiple channels, based on user preferences, self-service scheduling**
 - **my messages**
- migrate / integrate webinars
- Lead generation business rules
 - connected to many other streams: registration, subscription, site behavior, etc
- Service log-in, improved way finding
 - Retirement plan finder for participants
- Syndication: content & tools
 - offsite CG, distributed value
 - **outside content curation - DIGITAL PROSPECTING**
- Q submission, CG response
- Quick start: last viewed, most viewed, common tools
- **Content playlist - DIGITAL PROSPECTING**
- Goal tracking / personalized benchmarks
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- *CG book of business views (single view of the customer)*
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 - *customer facing & business facing*
- *connections to account service (TBD)*



Stage 3 | Capabilities


- Registration, ID mapping, profile, preferences
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Homepage & Redesign Content Review

DRAFT

Other sites ▾

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The American Funds by Capital Group


For more than 80 years, we've been singularly focused on delivering long-term, superior results.

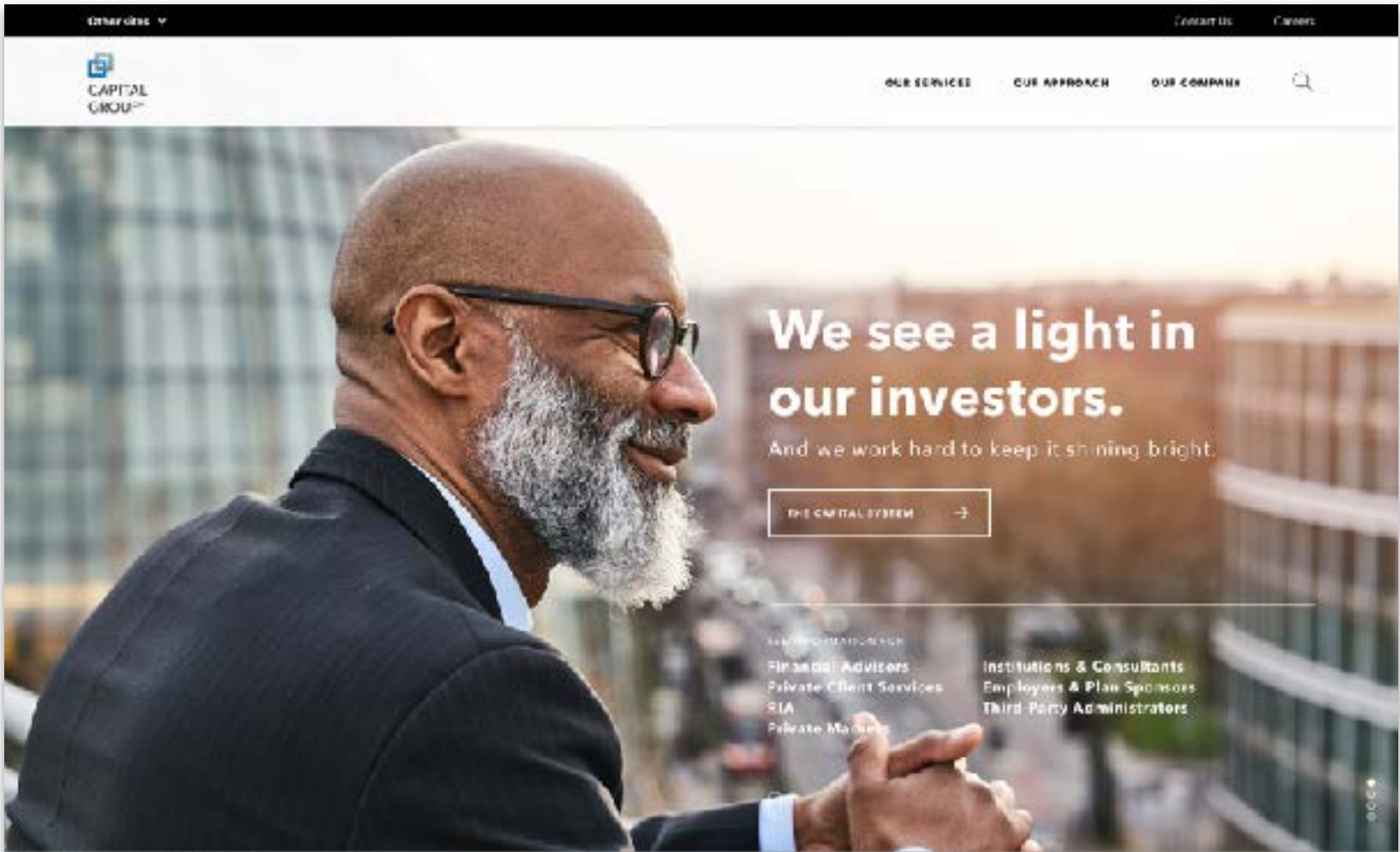
CHOOSE A SITE

- Individual Investors
- Financial Advisors
- Employers & Plan Sponsors
- Third-Party Administrators

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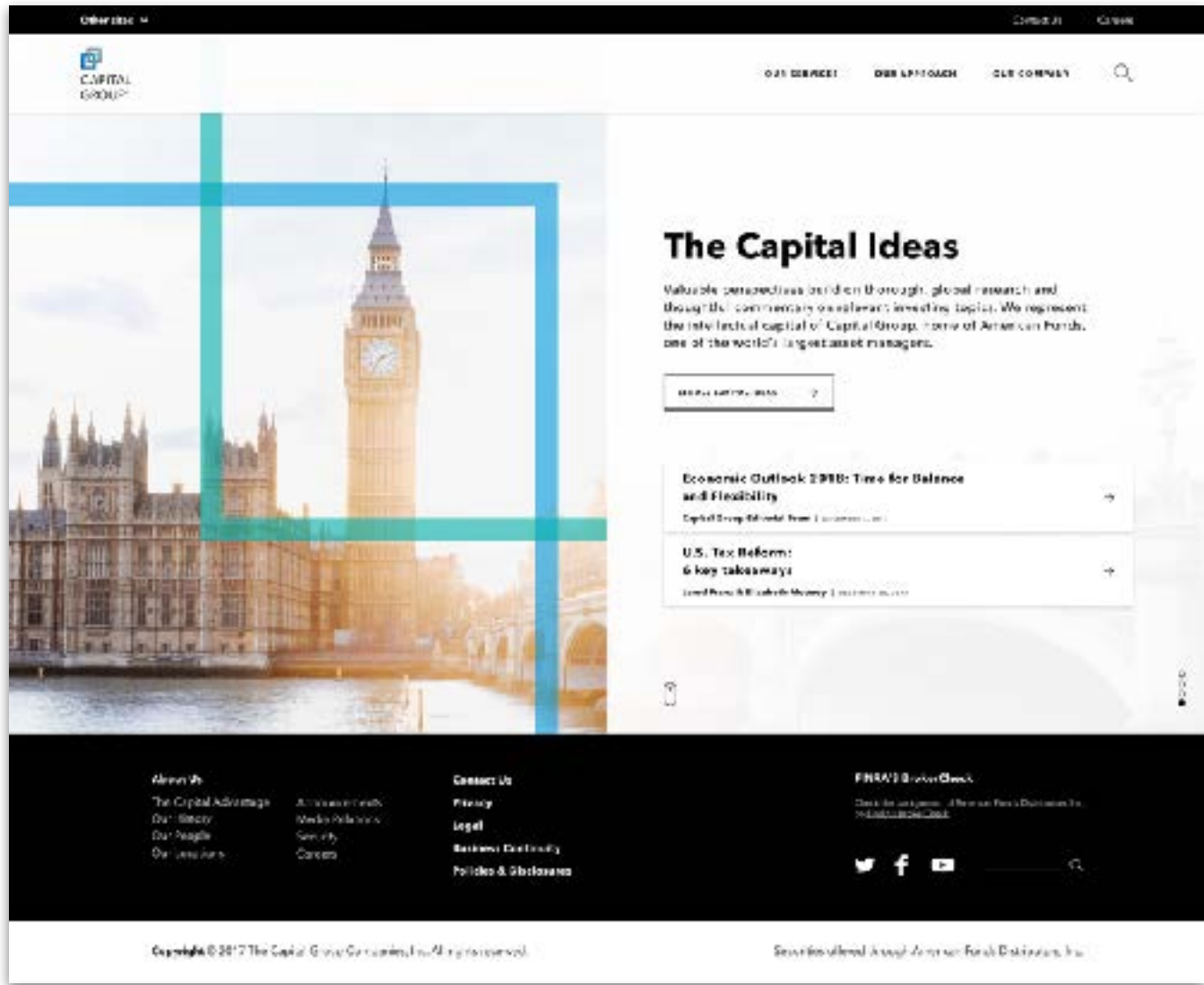
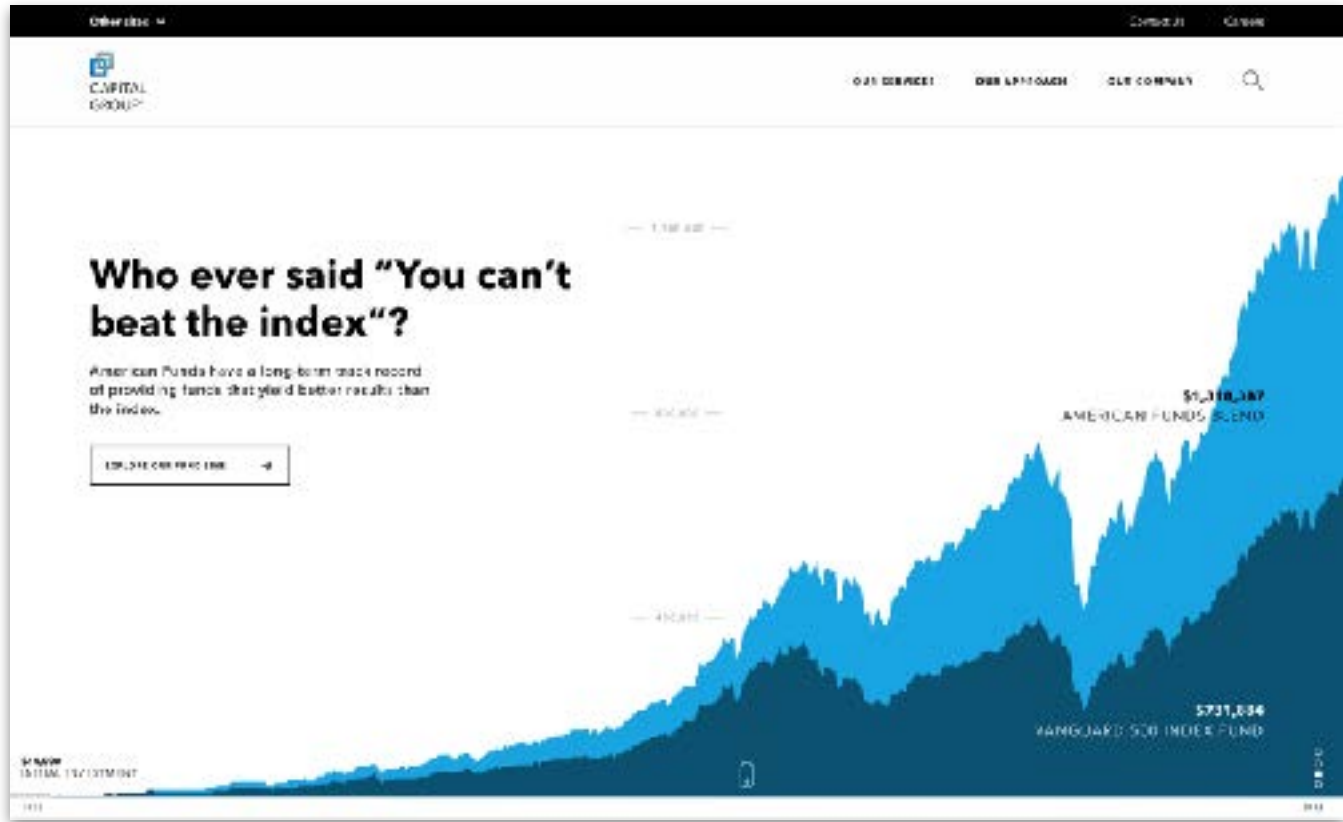
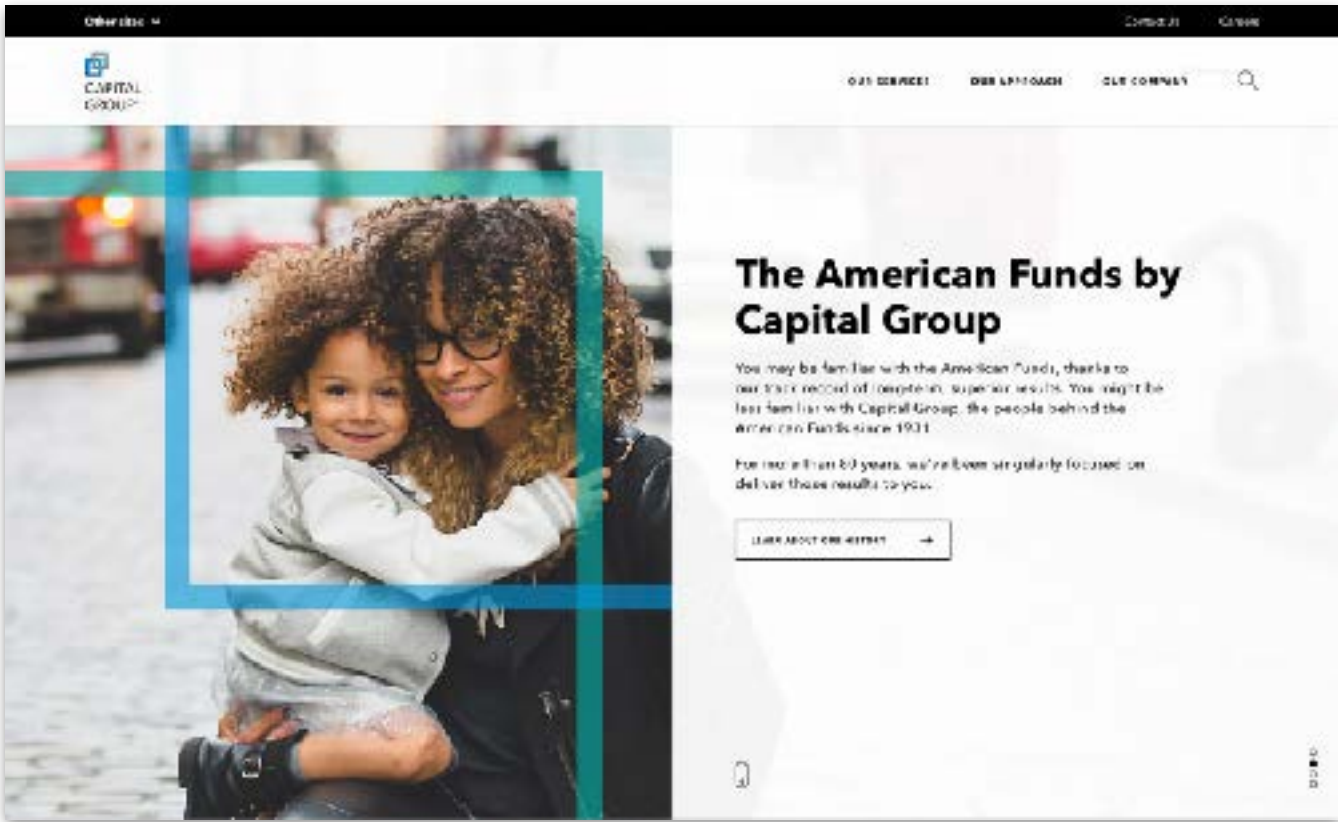
- Institutions & Consultants

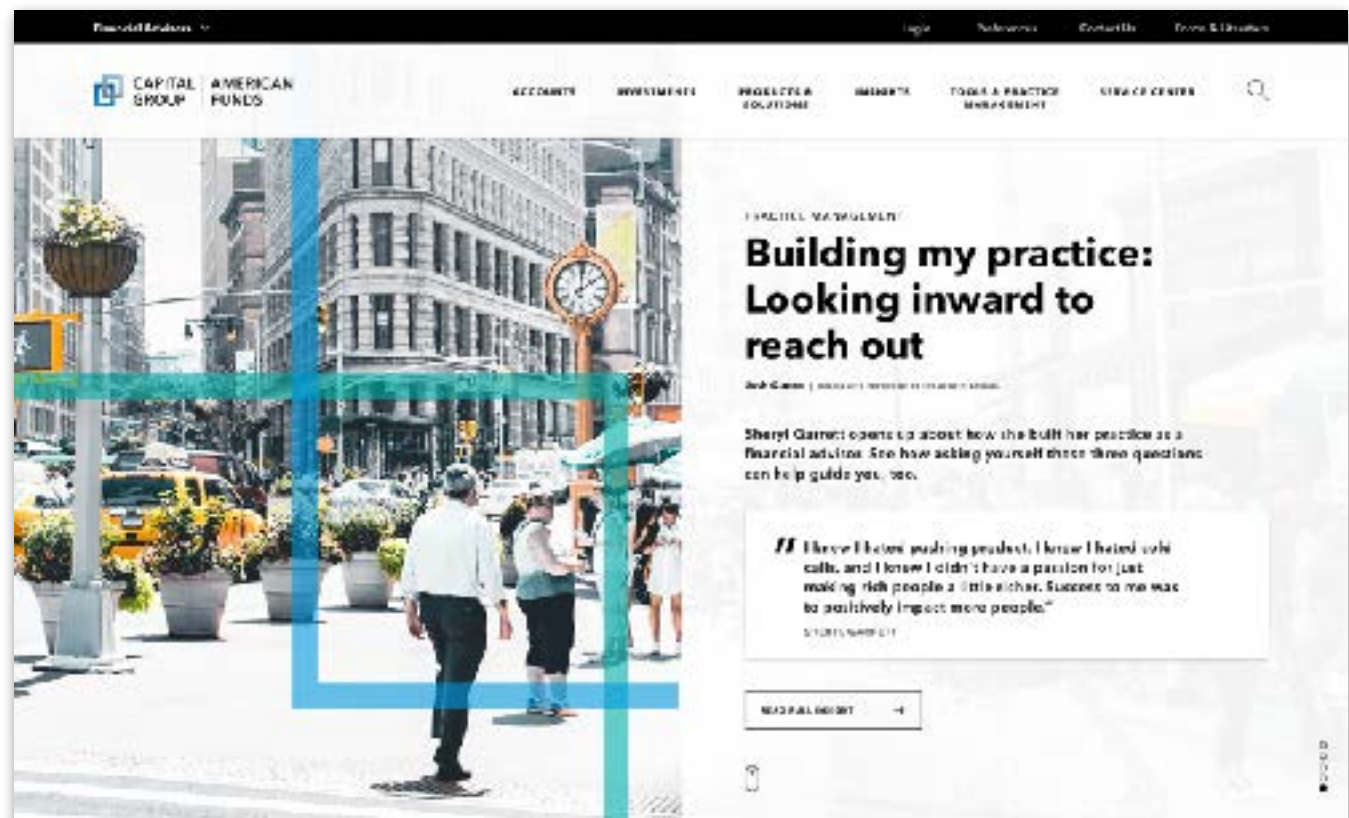
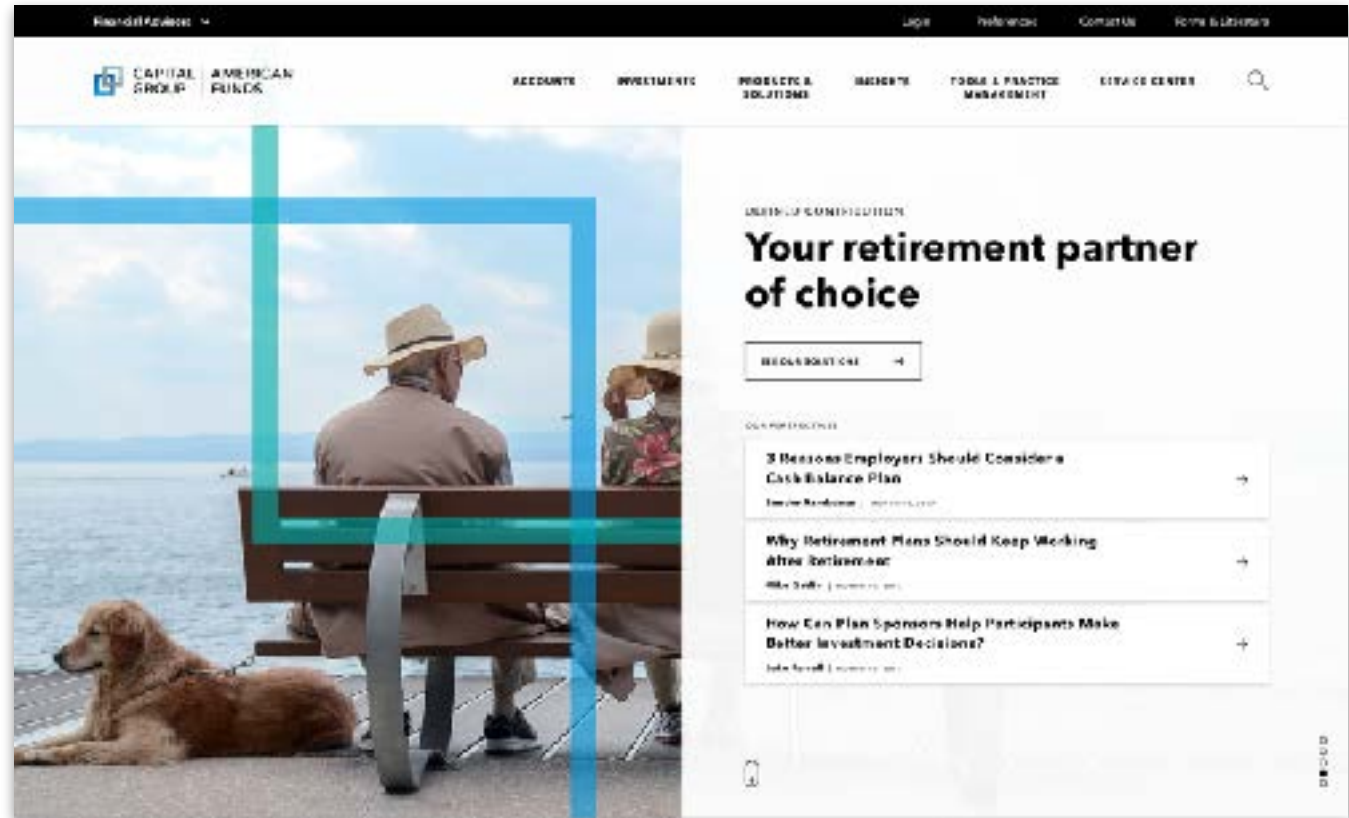
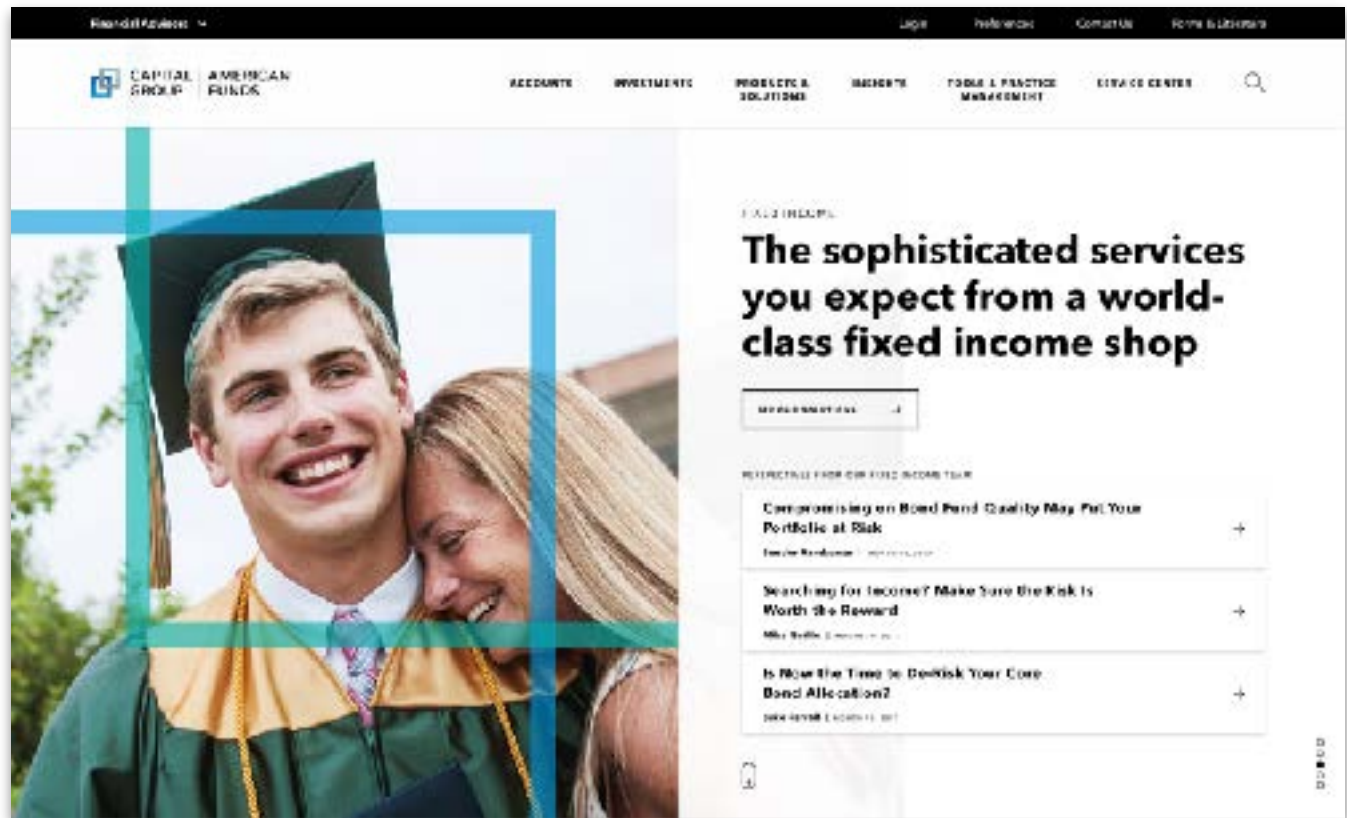
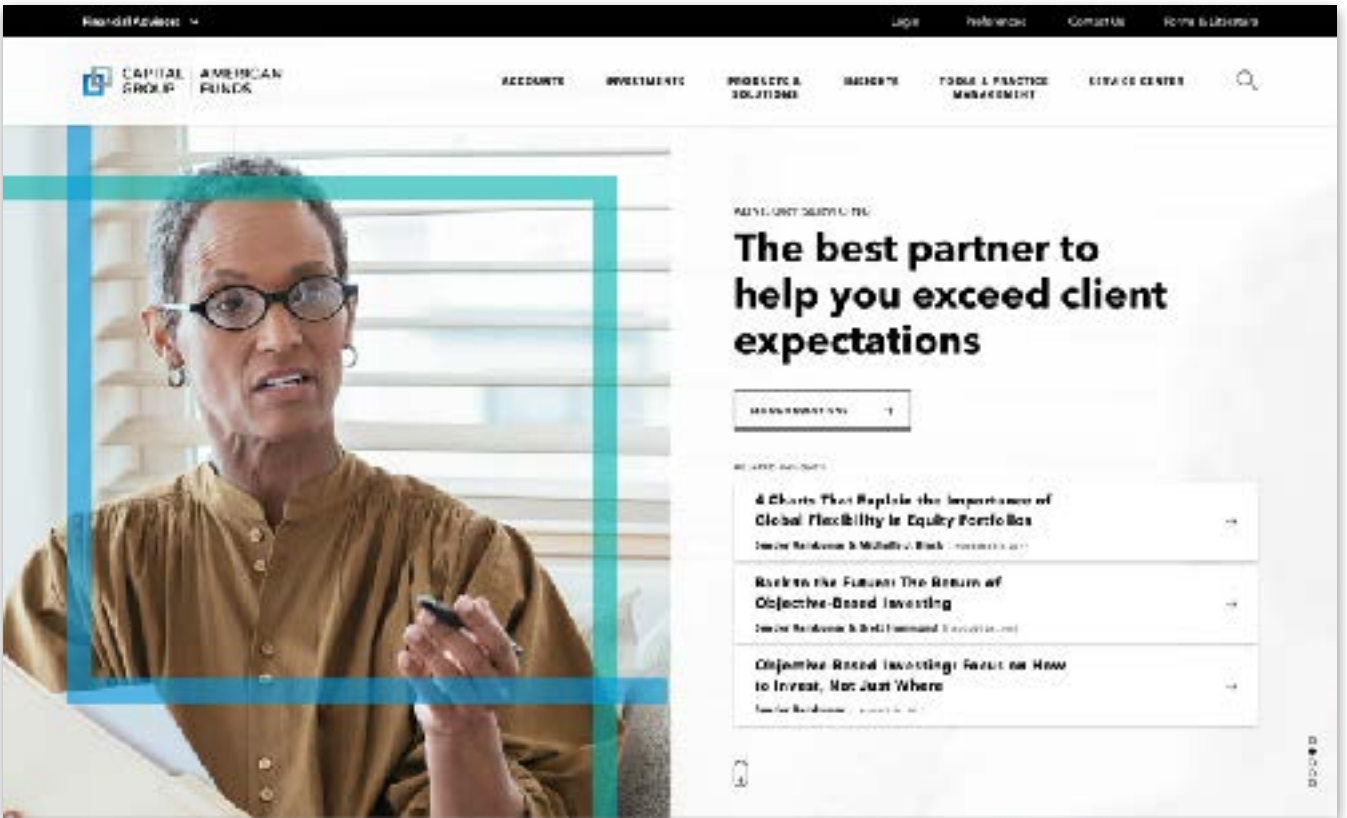
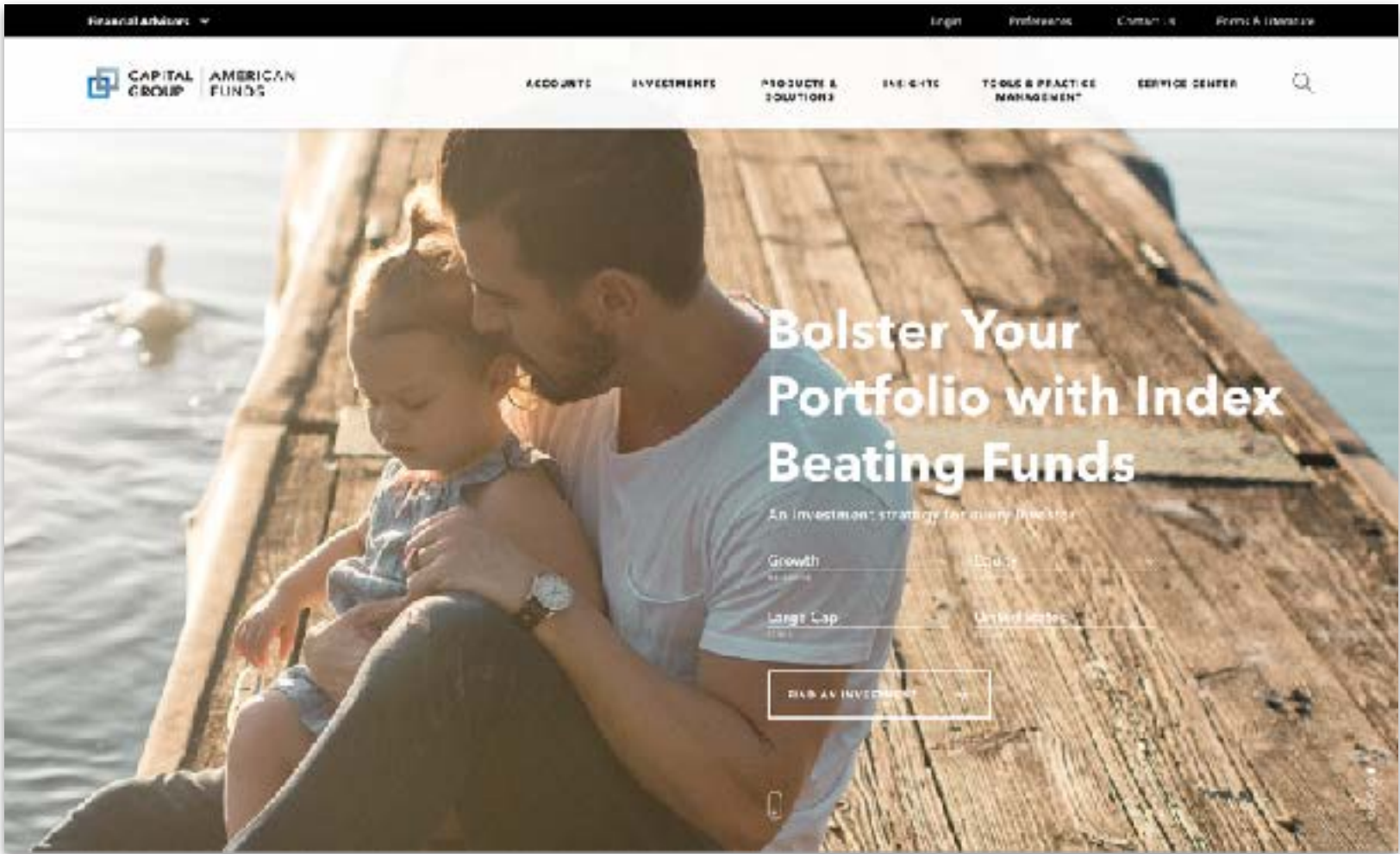




- Topics:**
- 1.Capital System
 - 1.Audience selector
 - 2.Our People
 - 3.Our Investments
 - 4.Capital Ideas
 - 5.Our History

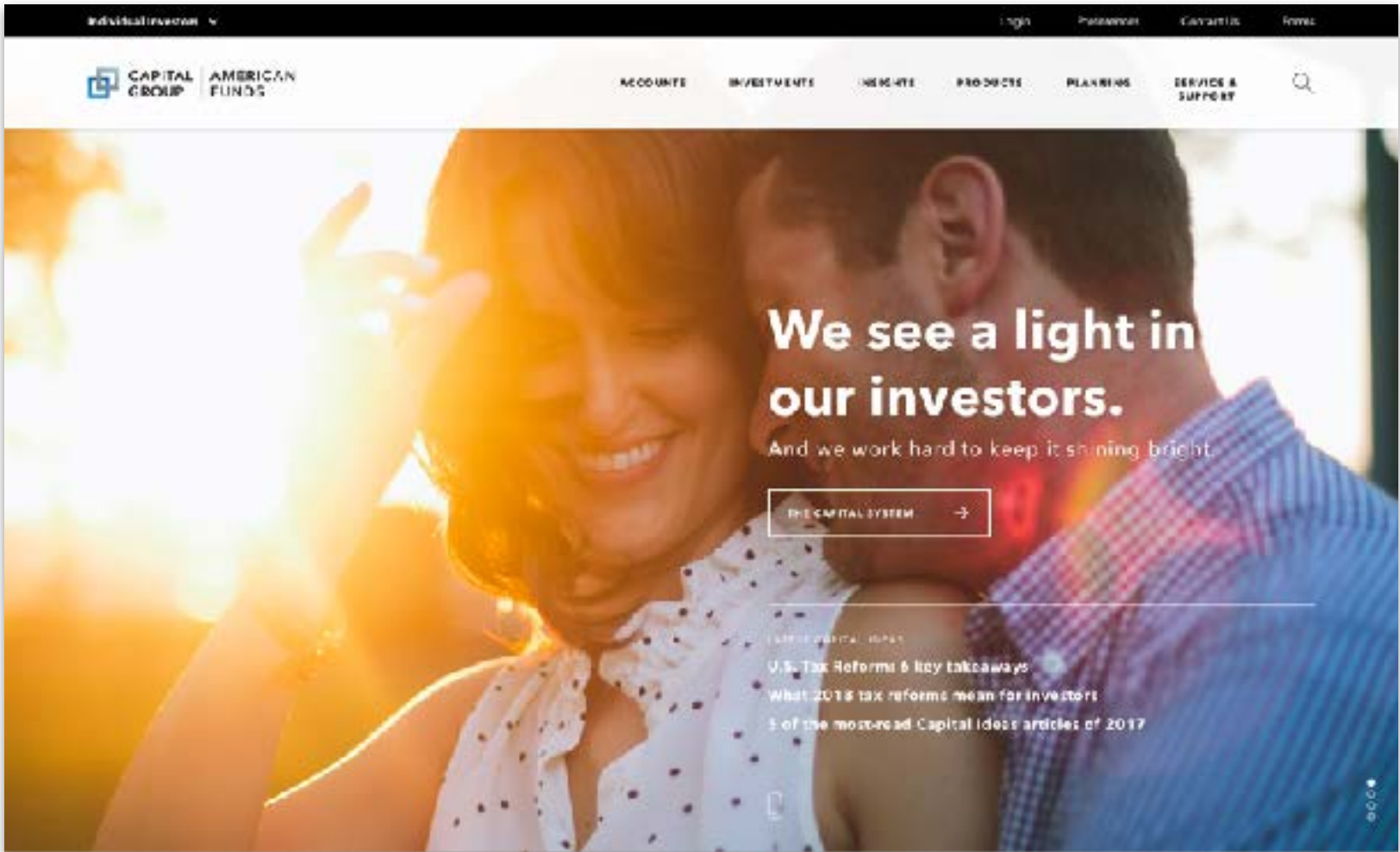
- key**
- 1.Net New
 - 2.Re-design
 - 3.Re-skin





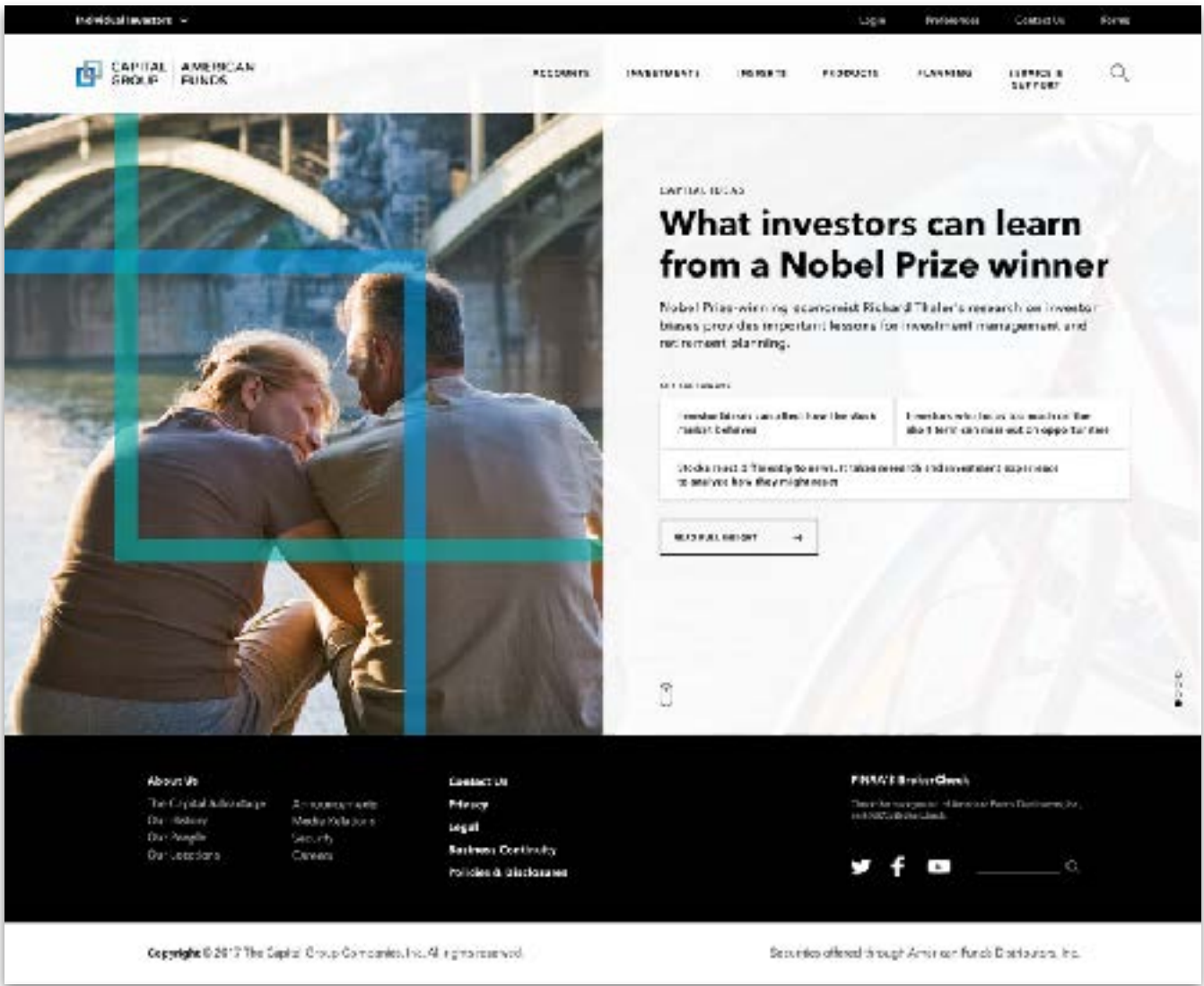
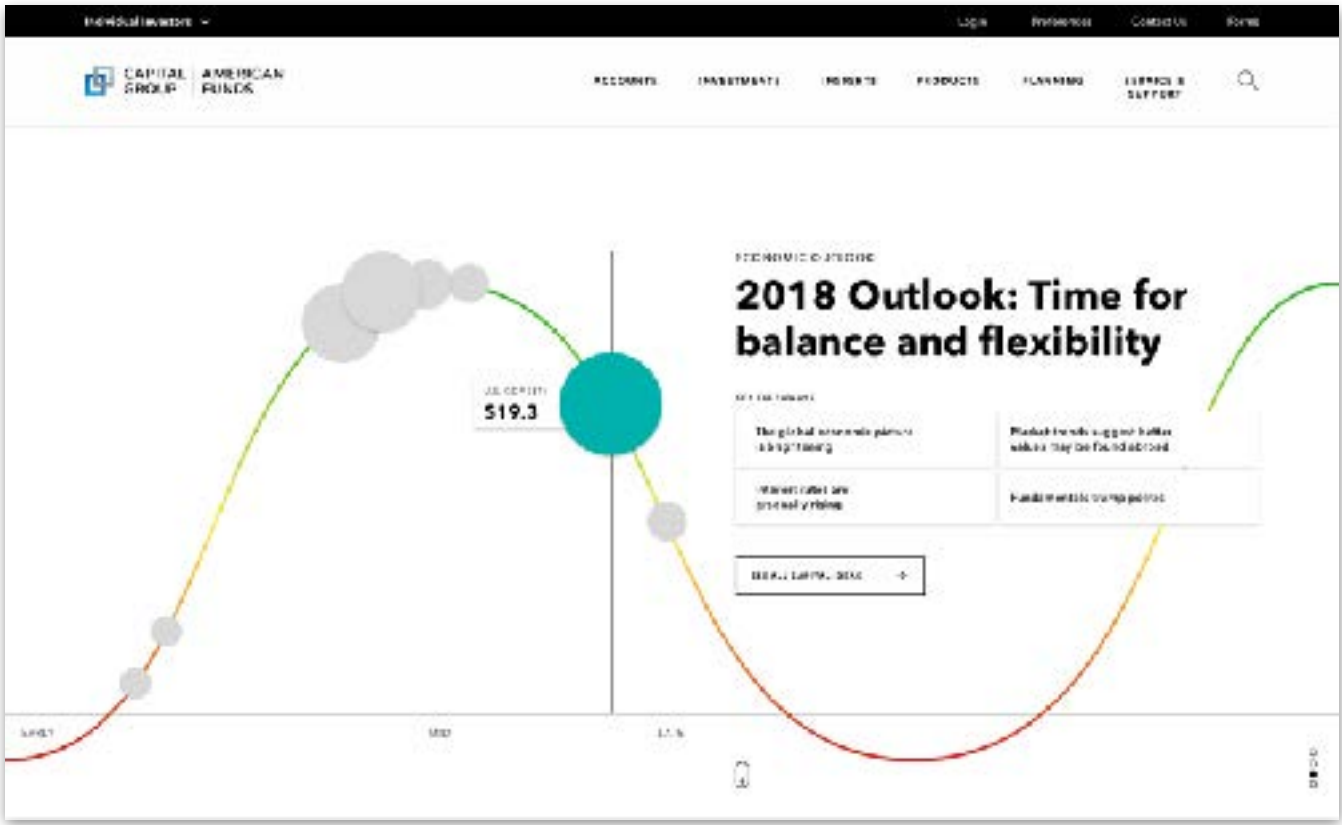
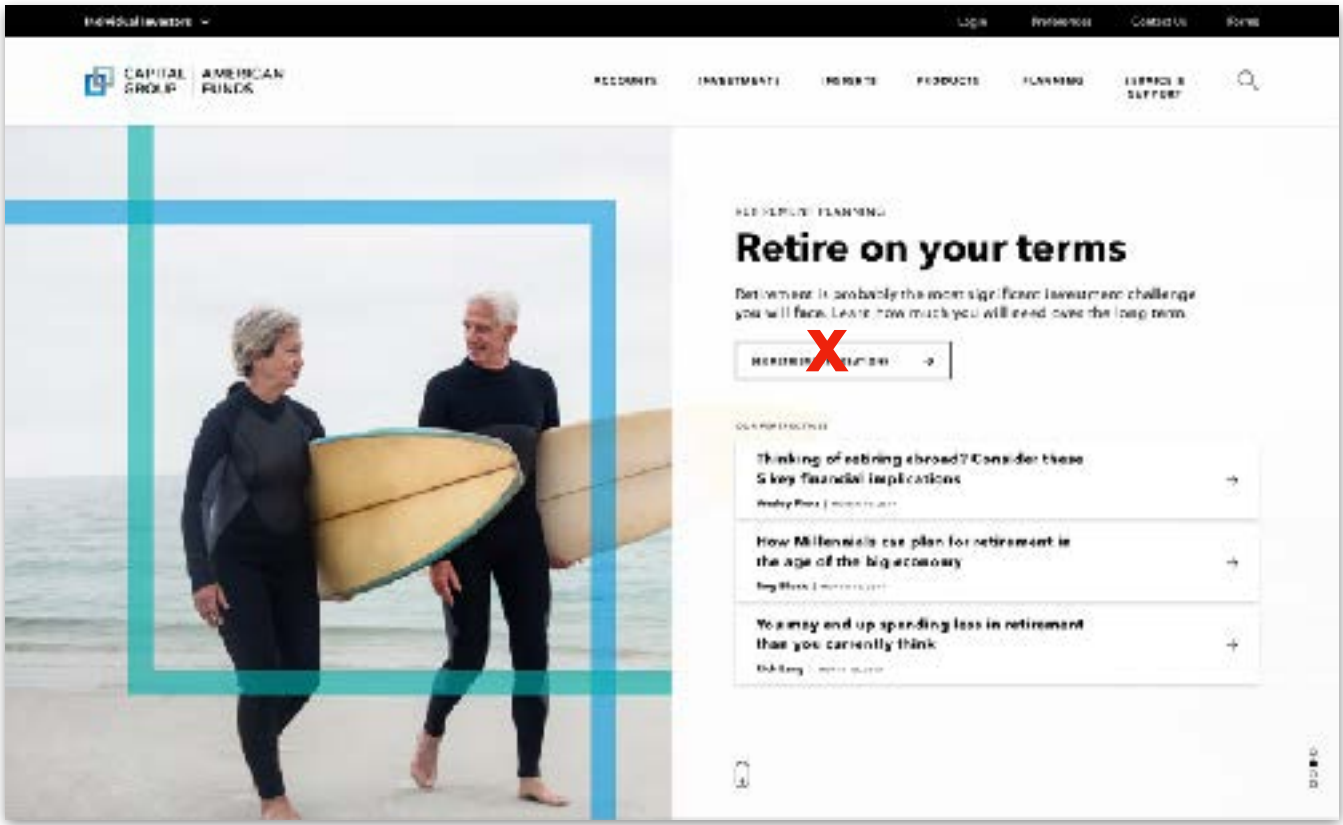
- Topics:**
- 1. Investments
 - 2. Advisory Servicing
 - 3. Fixed Income
 - 4. Practice Management
 - 5. Advisor sold retirement plans (IR)
 - 1. Defined Contribution

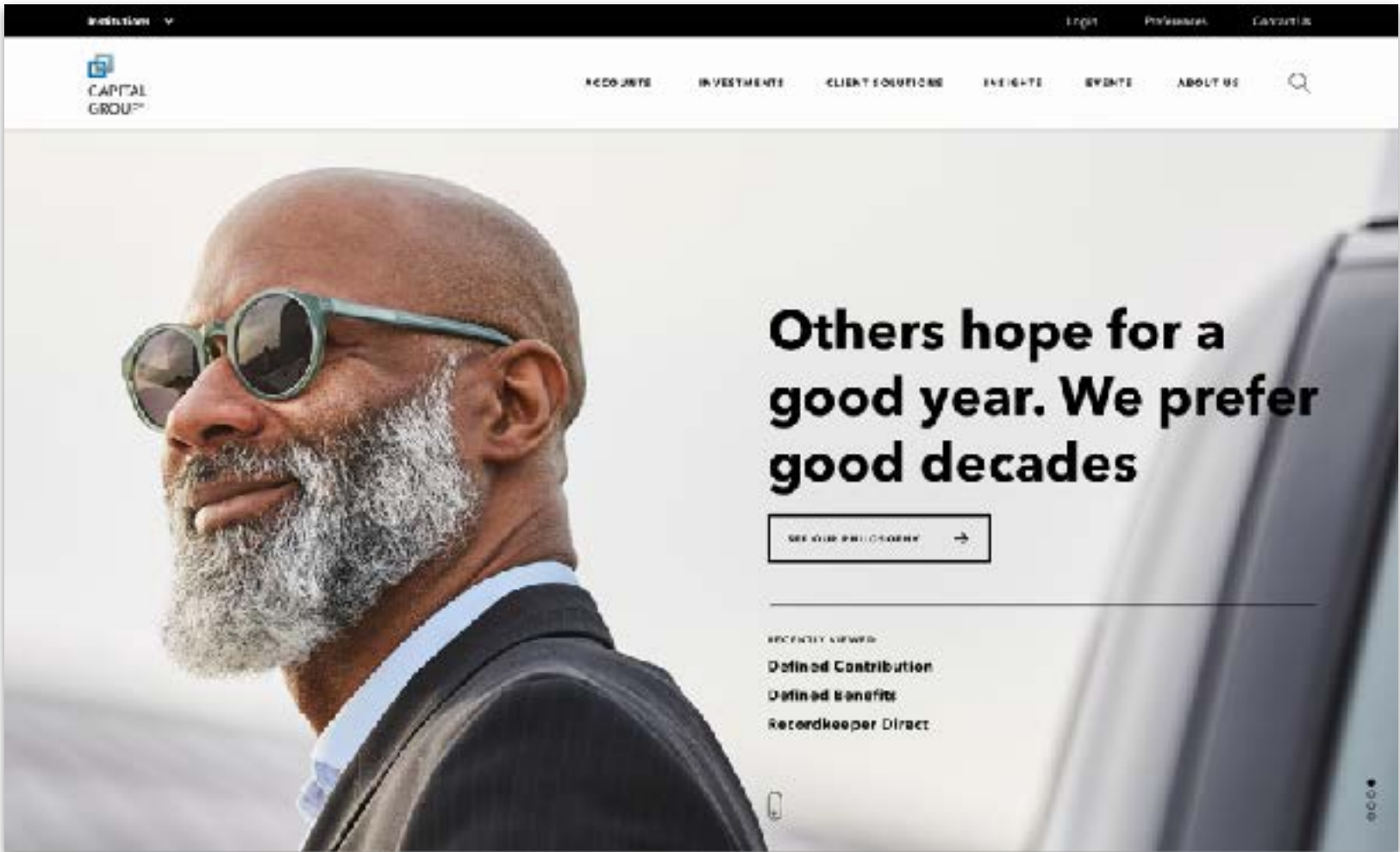
- key**
- 1. Net New
 - 2. Re-design
 - 3. Re-skin



- Topics:**
- 1. Capital System (reskin)
 - 2. Retirement (default)
 - 3. Thought Leadership:
 - 1. Outlook
 - 2. Capital Ideas

- key**
- 1. Net New
 - 2. Re-design
 - 3. Re-skin

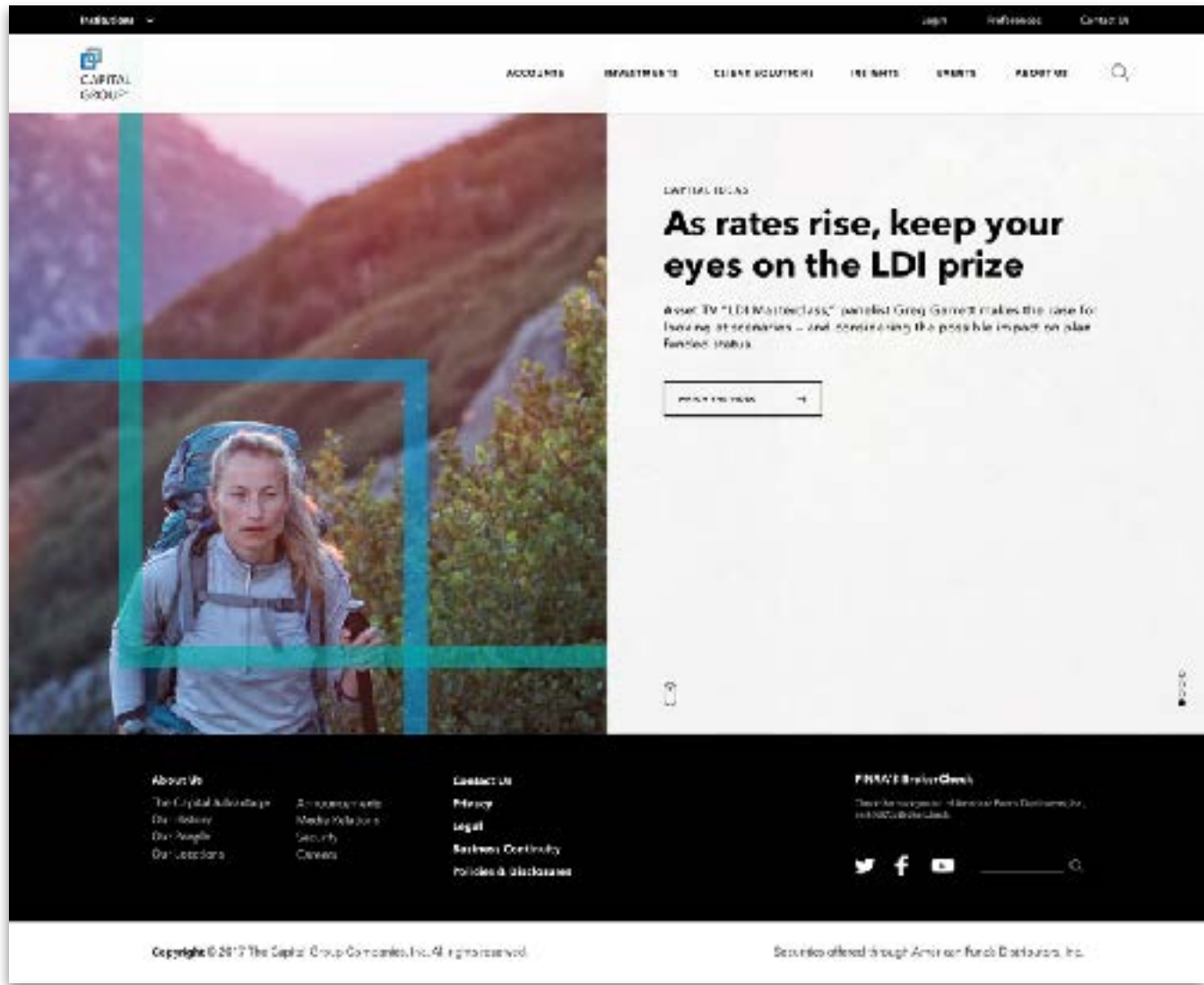
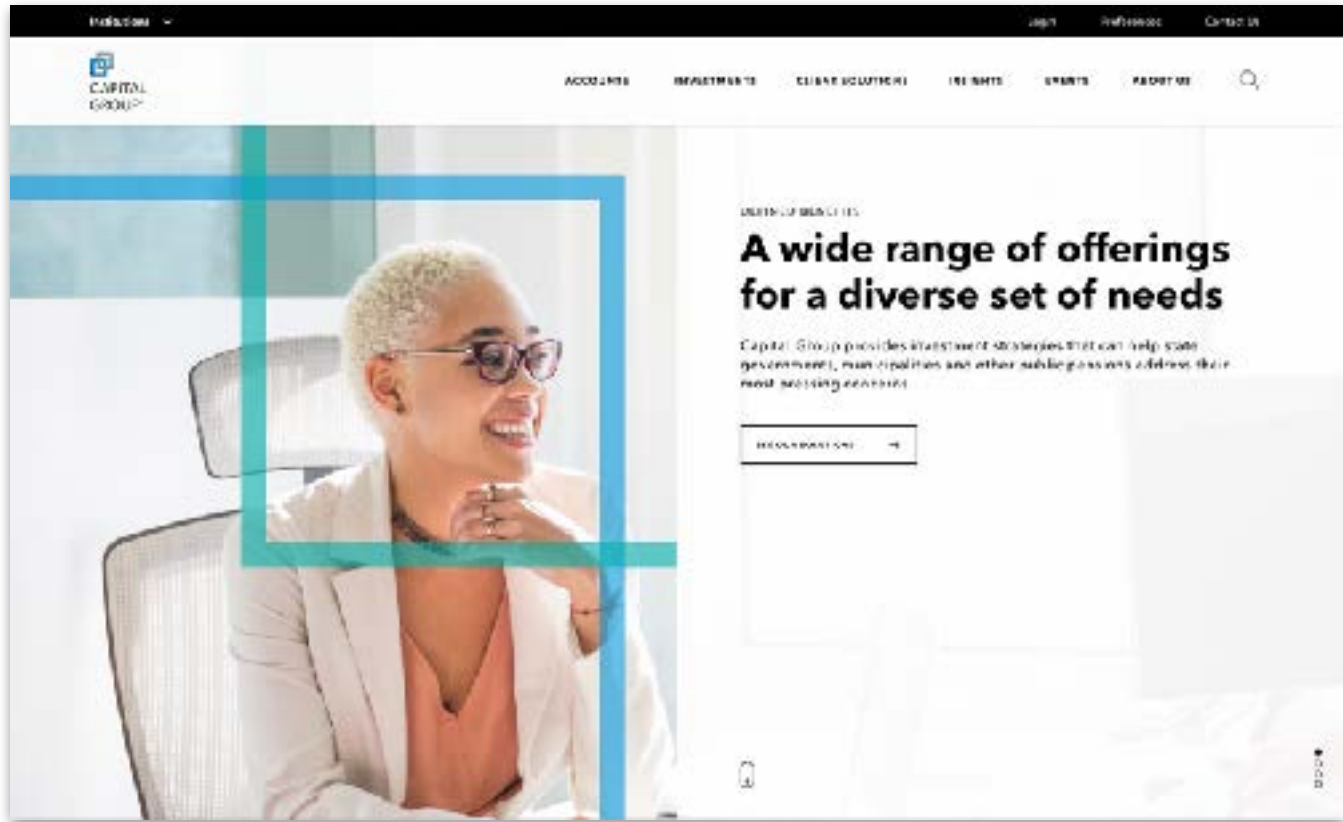
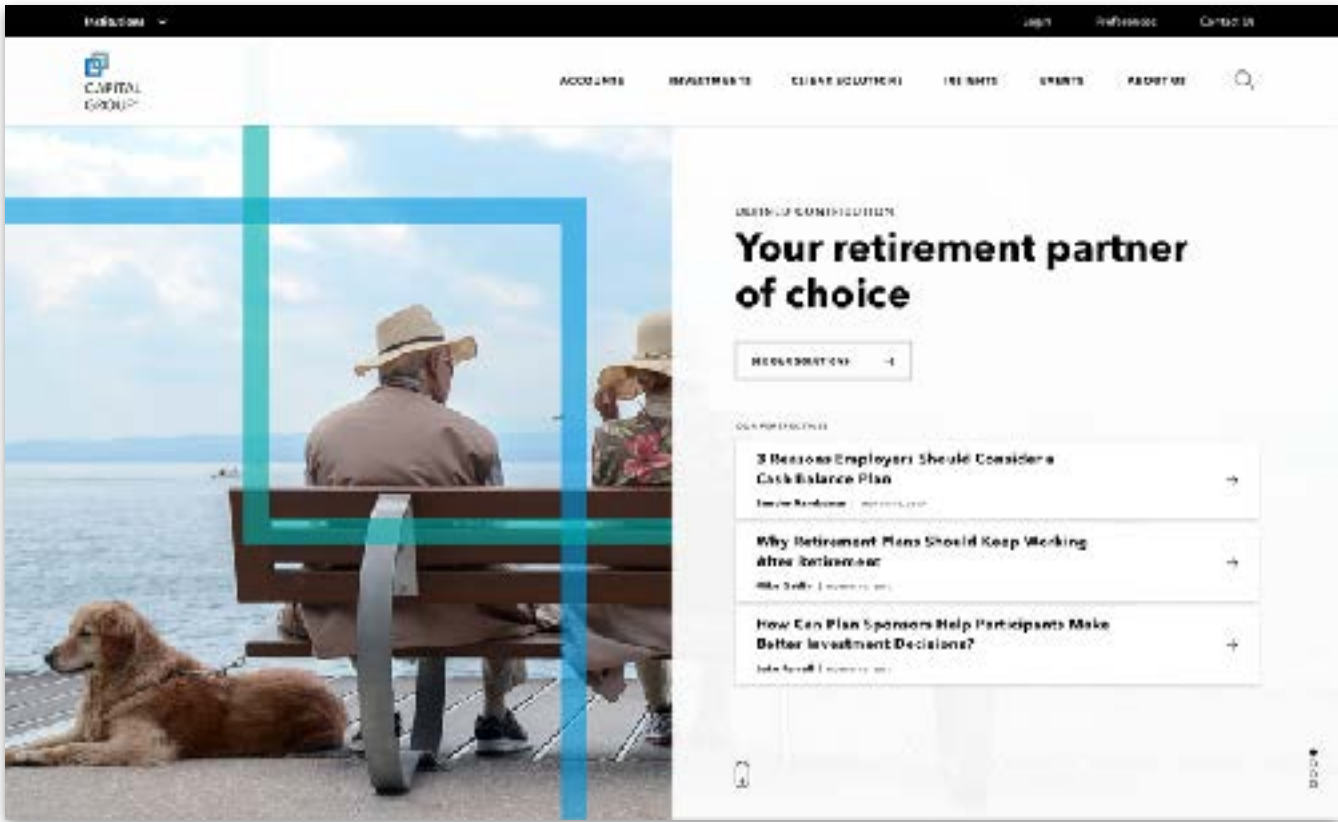


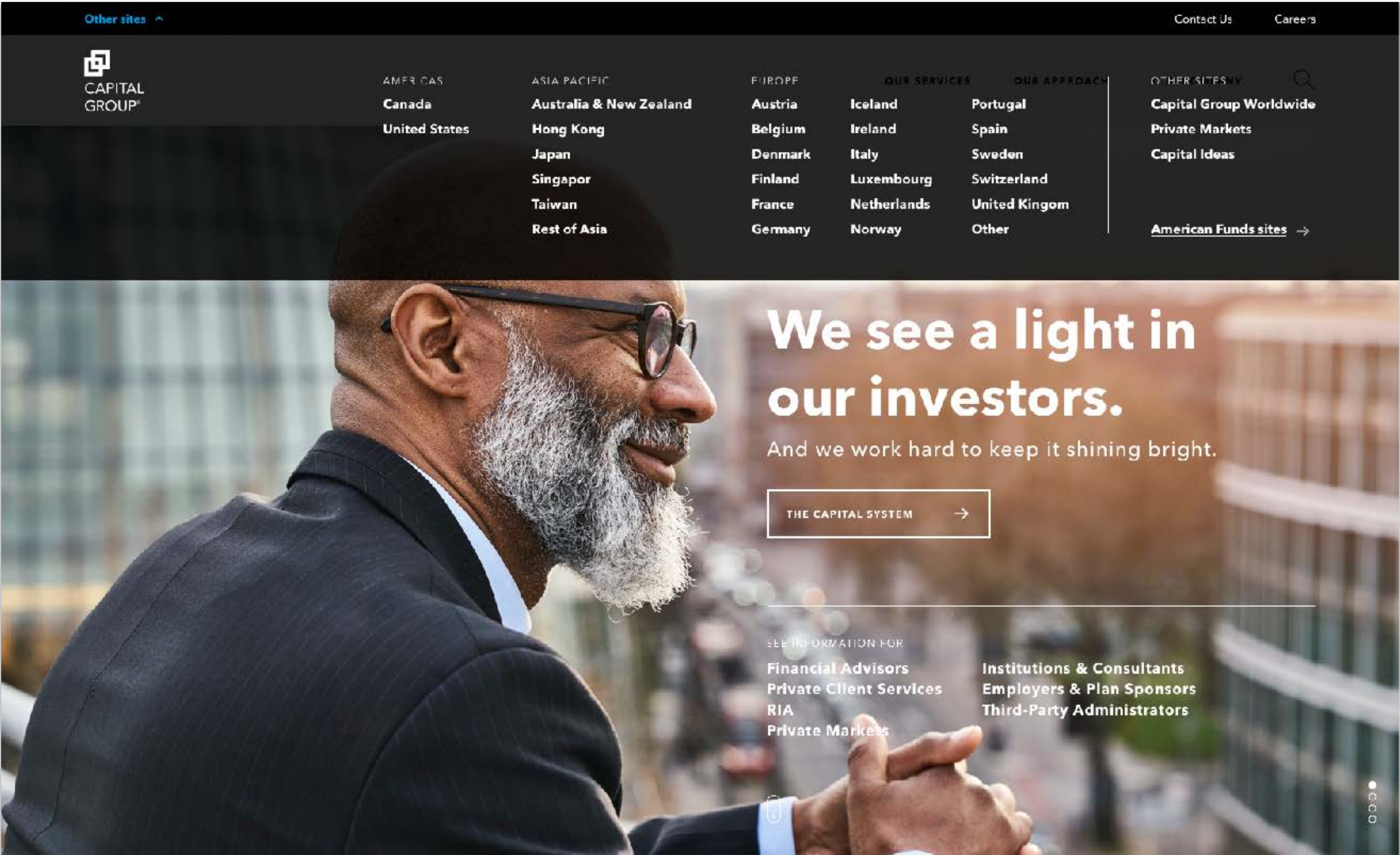


- Topics:**
- 1. Philosophy
 - 2. Defined Contribution
 - 3. Defined Benefits
 - 4. Thought leadership
 - 1. LDI

- key**
- 1. Net New
 - 2. Re-design
 - 3. Re-skin

- Topics:**
- 1. Investments (same from FP)
 - 2. Process
 - 3. People
 - 4. Our Insights
 - 5. Talk to... (version of contact us)
 - 6. Solutions for: (coming for particular topic)
 - 1. DC
 - 2. DB
 - 3. Endowments
 - 4. Foundations
 - 5. Bank Trusts
 - 6. Insurance
 - 7. Consultants






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Investments

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<p>INVESTMENT STRATEGIES</p> <ul style="list-style-type: none"> By Objective By Asset Type By Vehicle All Strategies 	<p>AMERICAN FUNDS DATA</p> <ul style="list-style-type: none"> Returns Daily Prices & Yields Literature Symbols & Fund Numbers Share Class Information Historical Prices Historical Distributions Fund Holdings Search 	<p>FUND RESEARCH TOOLS</p> <ul style="list-style-type: none"> Fund Screener Compare Funds Target Date ProView: Evaluate TDFs Download Data Investment Tracker 	<p>OTHER RESOURCES</p> <ul style="list-style-type: none"> Quarterly Attribution & Commentary
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Investors hope for a good year. We prefer good decades

SEE OUR PHILOSOPHY →


RECENTLY VIEWED

- Defined Contribution
- Defined Benefits
- Recordkeeper Direct

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Others hope for a good year. We prefer good decades



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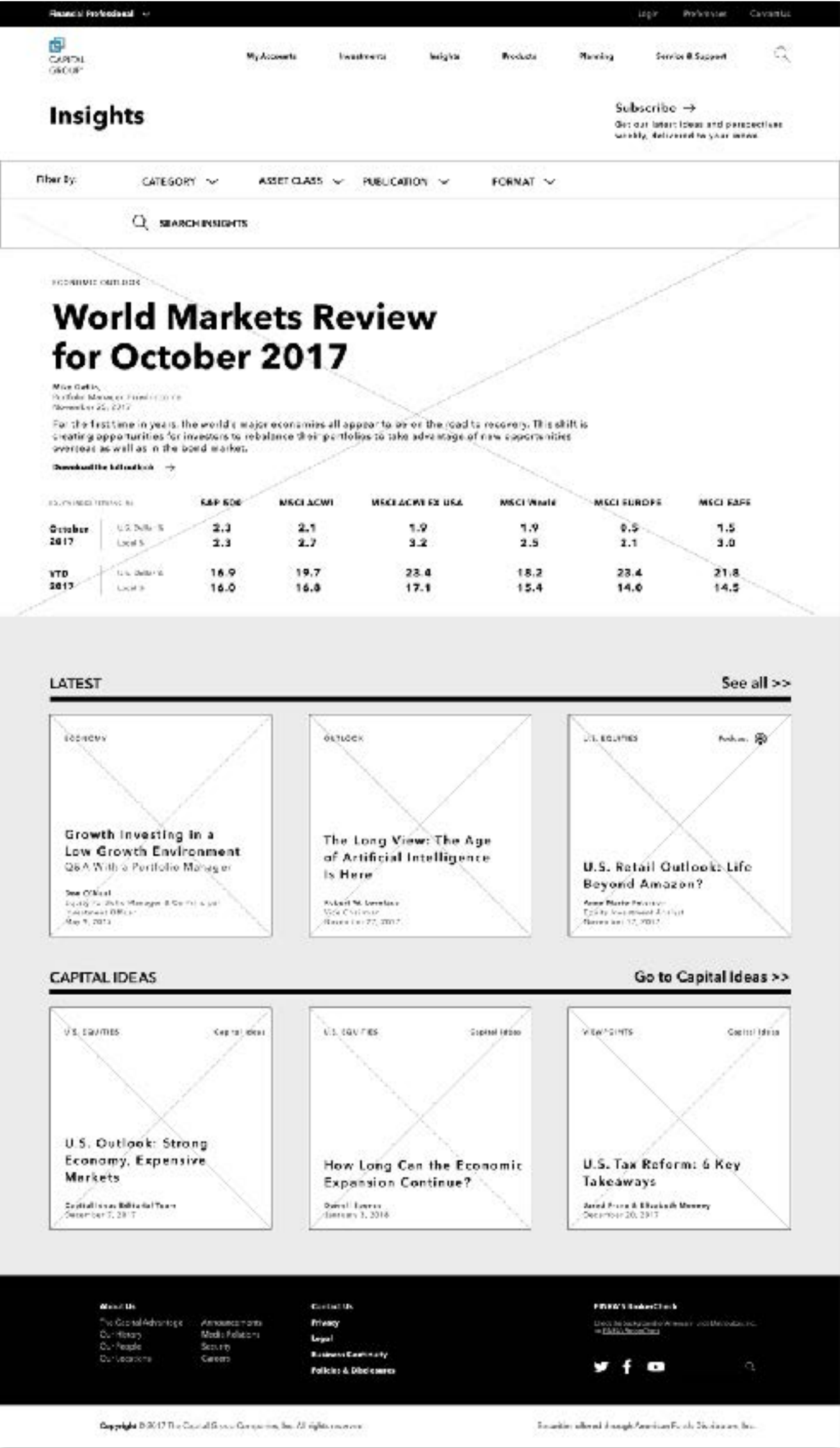
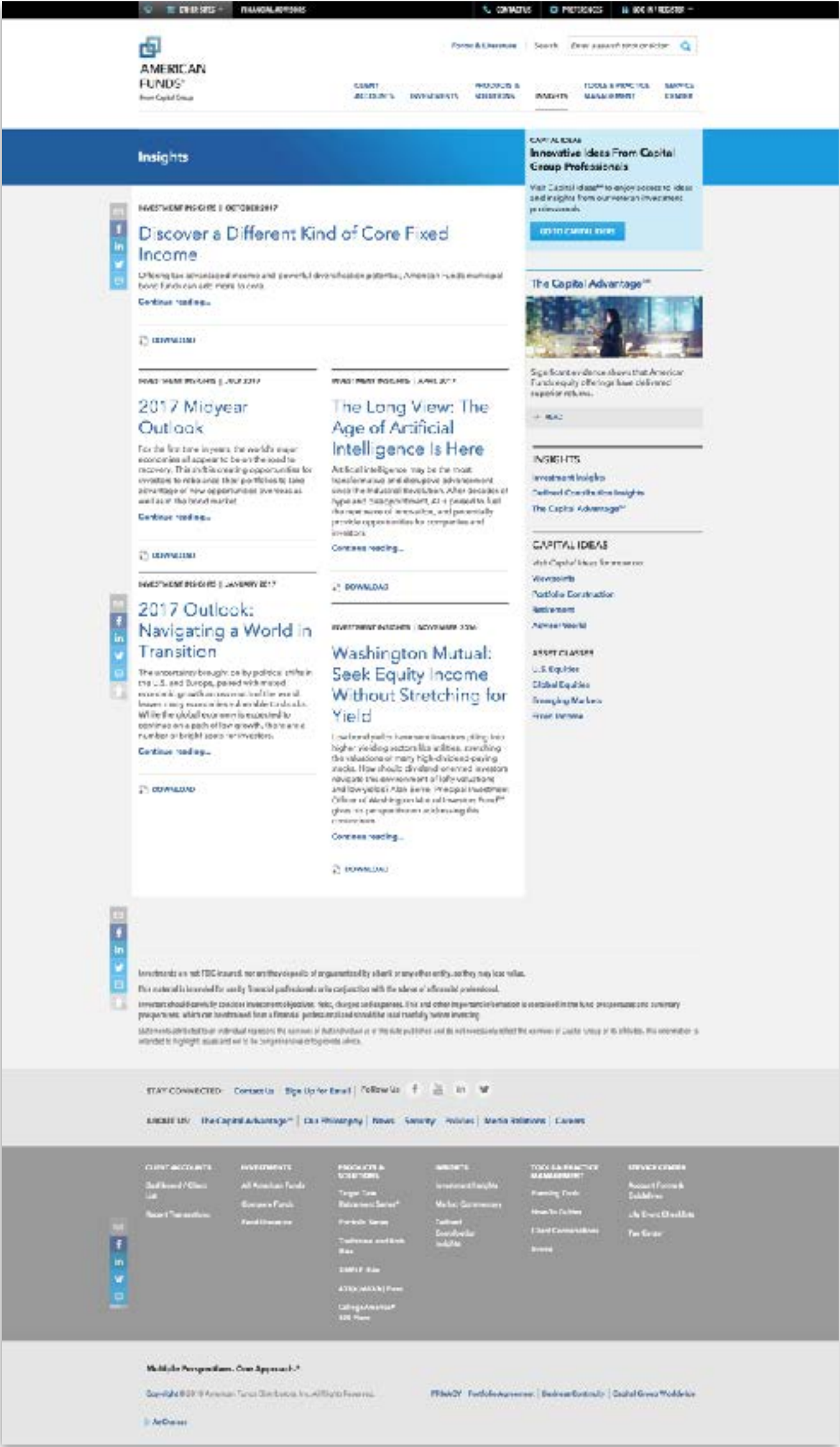
[SEE OUR PHILOSOPHY →](#)

RECENTLY VIEWED

- Defined Contribution
- Defined Benefits
- Recordkeeper Direct

●
○○○

Secondary pages | Insights Landing



Secondary pages | Investment Landing & Detail

Investments

Our investments are designed to provide consistent results, value and diversification.

Investment Objectives: Growth, Growth & Income, Income, Preservation & Income

Asset Class: Target Date, Equity, Fixed Income, Multi-Asset

Style: Growth, Large Cap, Core / Blend, Small / Mid Cap, Value

Region: United States, International, Global, Emerging Markets

51 FUNDS

Fund Name	Objective	Returns (%)			Standard Deviation	Expense Ratio	
		1-yr.	5-yr.	10-yr.		Gross	Net
AMCAP Fund AMCFX	Growth	22.26	15.75	10.28	15.89	0.28	0.48
EuroPacific Growth Fund AEPFX	Growth	22.26	15.75	10.28	15.89	0.20	0.48
The Growth Fund of America GFFFX	Growth	22.26	15.75	10.28	15.89	0.28	0.48
The New Economy Fund ANWFX	Growth	22.26	15.75	10.28	15.89	0.28	0.48
New World Fund NFFFX	Growth	22.26	15.75	10.28	15.89	0.28	0.48
AMCAP Fund AMCFX	Growth	22.26	15.75	10.28	15.89	0.28	0.48

Investments

SEARCH INVESTMENTS

INVESTMENT OBJECTIVE

- Growth
- Growth & Income
- Income
- Preservation & Income

ASSET CLASS

- Target Date
- Equity
- Fixed Income
- Multi-Asset

STYLE

EQUITIES

- Growth
- Large Cap
- Core / Blend
- Small / Mid Cap
- Value

FIXED INCOME

- Short Term
- Intermediate Term
- High Yield
- Taxable
- Tax-Exempt

REGION

- United States
- International
- Global
- Emerging Markets

Share Class

Fund Name	Objective	Returns (%)			Standard Deviation	Expense Ratio	
		1-yr.	5-yr.	10-yr.		Gross	Net
AMCAP Fund AMCFX	Growth	22.26	15.75	10.28	15.89	0.28	0.48
EuroPacific Growth Fund AEPFX	Growth	22.26	15.75	10.28	15.89	0.20	0.48
The Growth Fund of America GFFFX	Growth	22.26	15.75	10.28	15.89	0.28	0.48
The New Economy Fund ANWFX	Growth	22.26	15.75	10.28	15.89	0.28	0.48
New World Fund NFFFX	Growth	22.26	15.75	10.28	15.89	0.28	0.48
AMCAP Fund AMCFX	Growth	22.26	15.75	10.28	15.89	0.28	0.48

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The Bond Fund of America (ABNDX)

Summary Returns Ratings & Risks Holdings Prices & Distributions Fees & Expenses Resources

Summary

A Core Bond Portfolio With Broad Diversification. Our most diversified bond fund invests in nearly every sector of the bond market, with a focus on securities rated A or above.

Price at NAV: \$12.93 as of 12/11/17 | Assets (Millions): \$36,613.6 | Portfolio Managers: 7 | Expense Ratio: 0.62%

Returns at NAV

1-year return	2.56%	2.02%	2.02%
5-year return			
10-year return			

Returns at MOP

30 Day SEC Yield Fund With Sales Charge	0.62%
---	-------

Asset Mix

- U.S. Equities: 0%
- U.S. Bonds: 82.1%
- Cash & Equivalents: 4.8%
- Non-U.S. Equities: 0%
- Non-U.S. Bonds: 13.1%

Growth of 10K

High & Low Prices

For Class A Shares, this chart tracks a hypothetical investment with dividends reinvested through 12/31/2016.

Fund Statistics

7.3 years Average Life	5.5 years Average Duration	2.7% Average Yield to Maturity	2.9% Average Coupon
------------------------	----------------------------	--------------------------------	---------------------

Morningstar Style Box - Fixed Income

High Medium Quality Moderate Interest-Rate Sensitivity

Medium Low

Low

Description

Objective: The fund's investment objective is to provide as high a level of current income as is consistent with the preservation of capital.

Disdistingishing Characteristics: Broadly diversified fixed income fund with flexibility to respond to various bond market conditions.

Types of Investments: Primarily invests in corporate debt securities, U.S. and other government securities, mortgage-related securities and cash.

Holdings Outside the U.S.: May invest up to 20% of assets in fixed income securities of corporations and government entities outside the United States.

Maturity: Typically, the fund will be invested in intermediate- to long-term securities.

Portfolio Restrictions: The fund generally invests at least 80% of its assets in bonds, including corporate bonds, U.S. government securities and money market instruments. At least 65% of its assets will be invested in securities rated A/A+ or better at the time of purchase (or un-rated but determined by the fund's investment adviser to be of equivalent quality). It is the fund's current practice not to invest more than 10% of its assets in debt securities rated B+1 and B+1 or below.

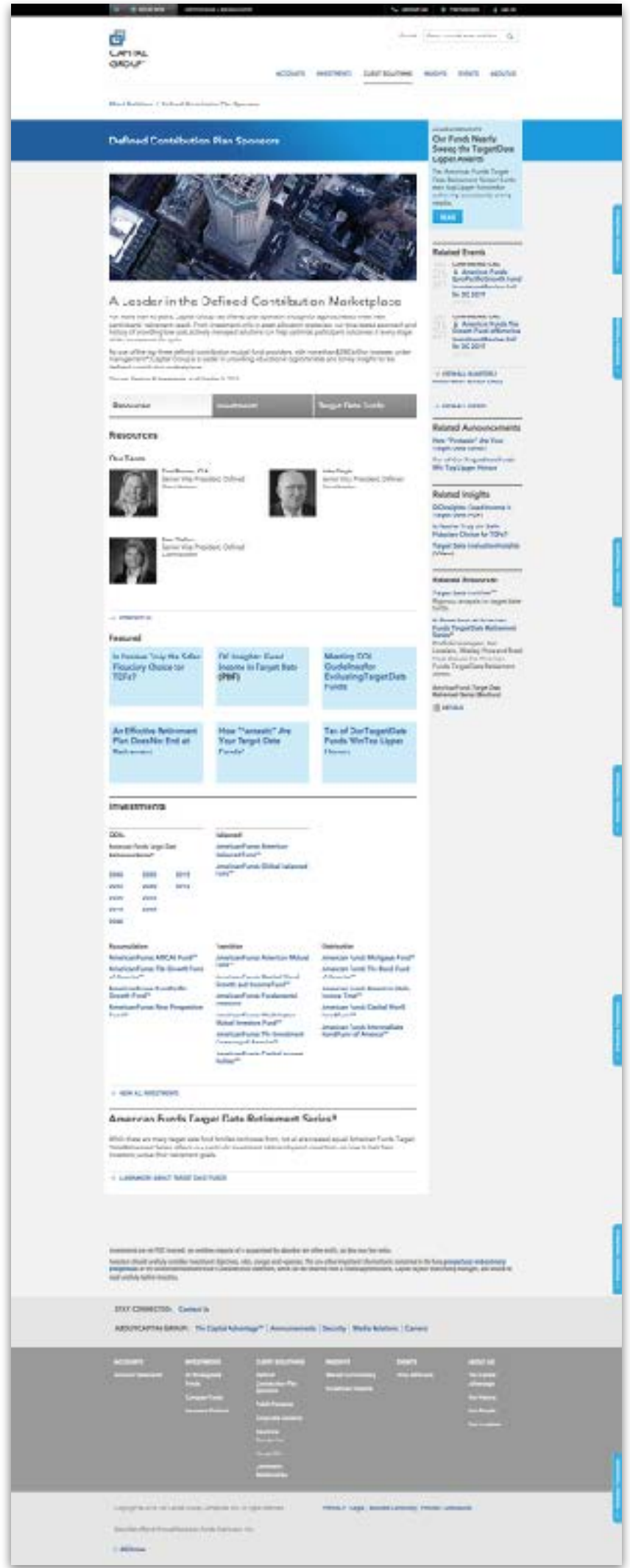
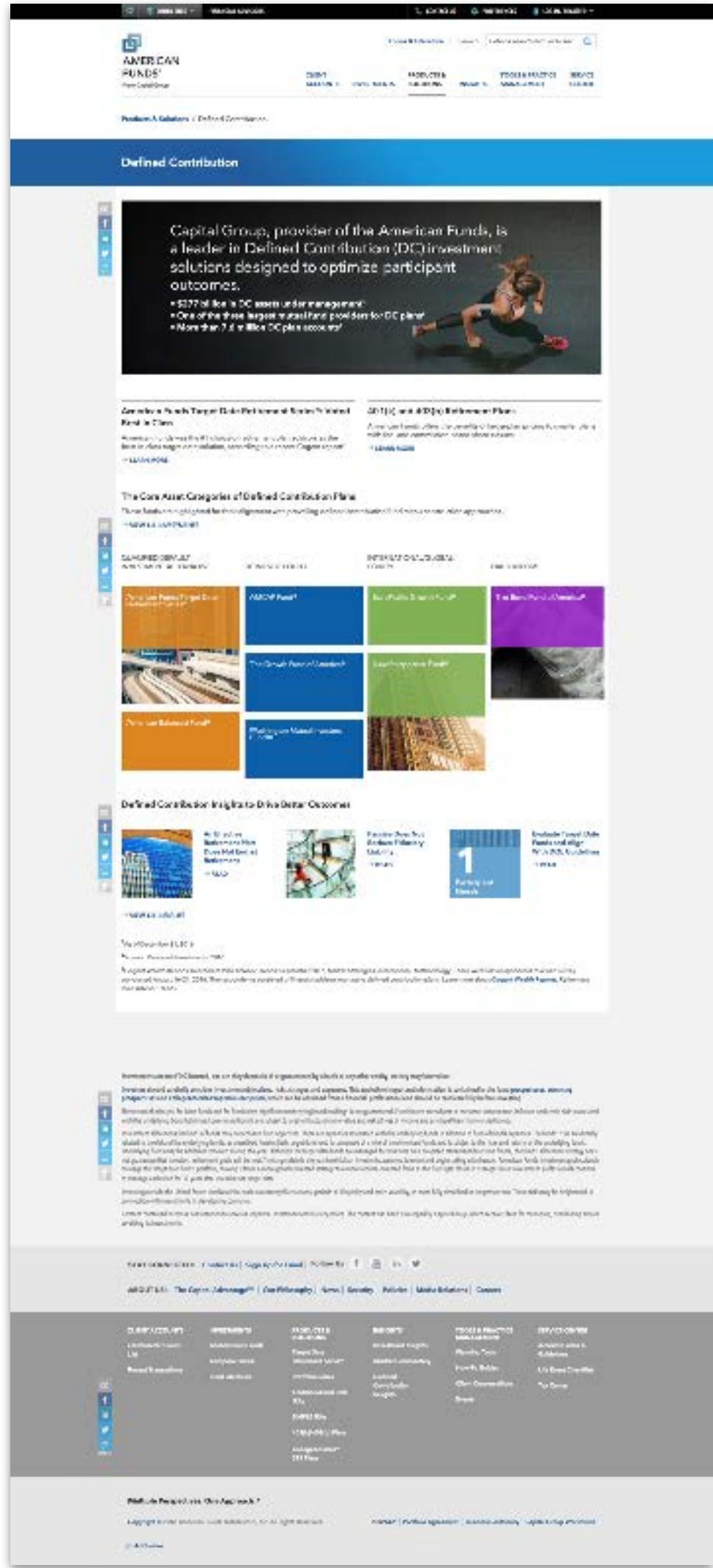
Fund Facts

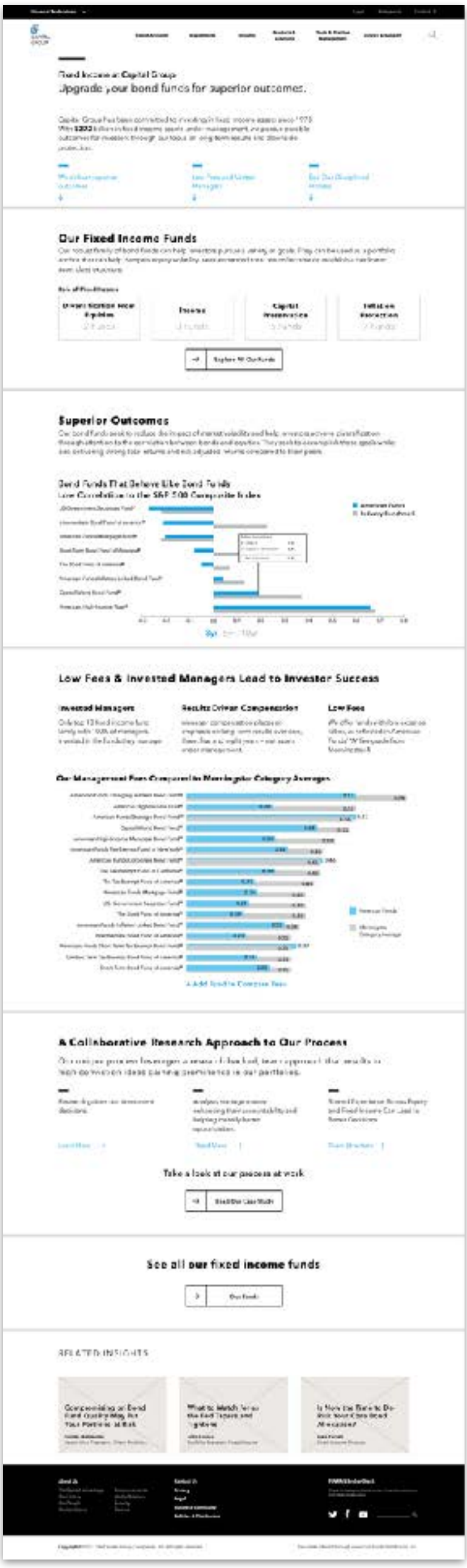
Fund Inception	5/28/1975	Capital Gains Paid	-
Fund Assets (Millions)	\$36,613.6	Fund's Turnover (2016)	343%
Companions/Shares	710+	Fiscal Year-End	Dec
Shareholder Accounts	1,215,716	Prospectus Date	8/14/2017
Regular Dividends Paid	Monthly	CUSIP	097873103
Minimum Initial Investment	\$250	Fund Number	8

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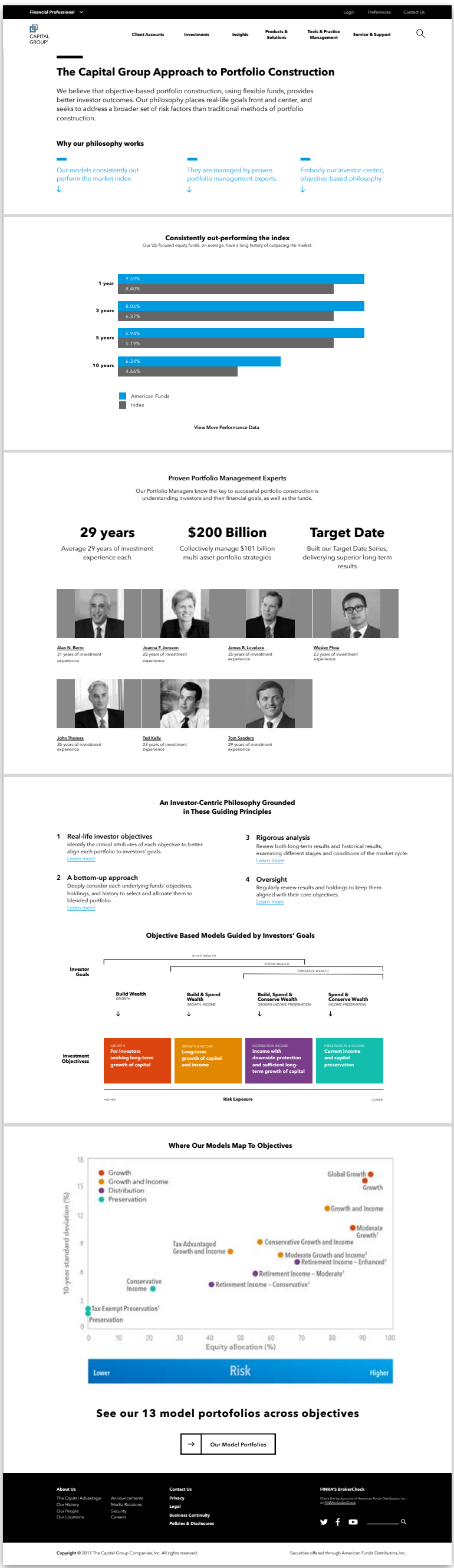
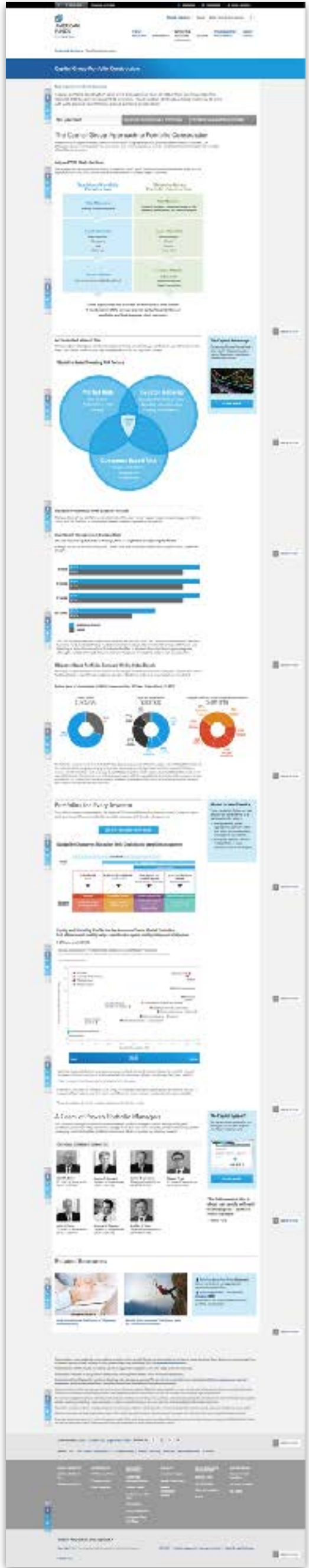
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Secondary pages | Defined Contribution





Secondary pages | Portfolio Construction

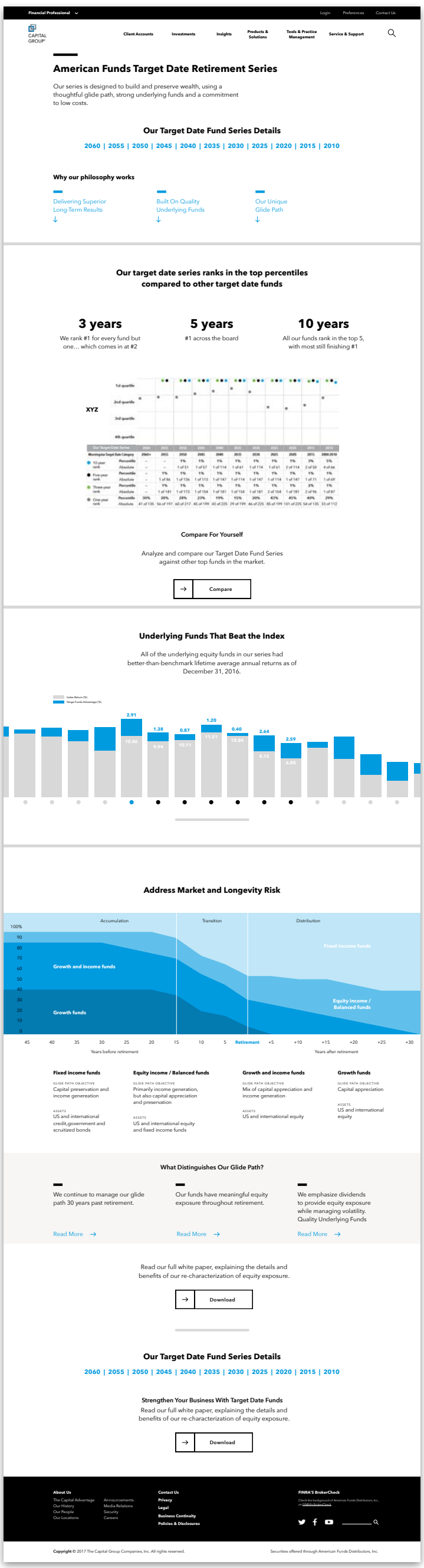


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X



Digital Brand Expression

The new Capital Group digital expression reenergizes the brand by activating content with **immersive imagery and **subtle animation** framed by a **clean, breathable interface**.**

Imagery should be:

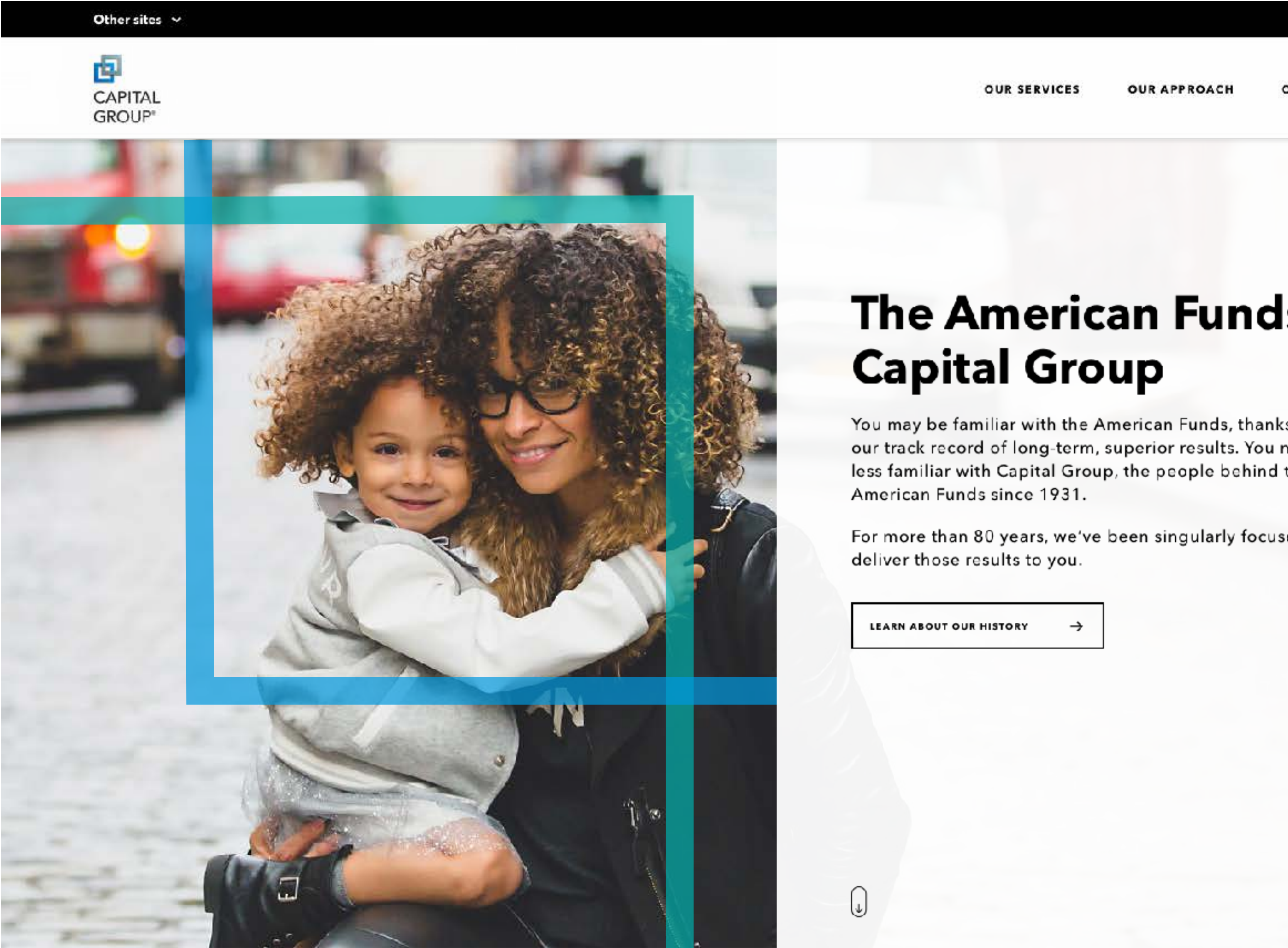
Aspirational
Bright

Highlighting:

Content
Distinct focal points
Life stages

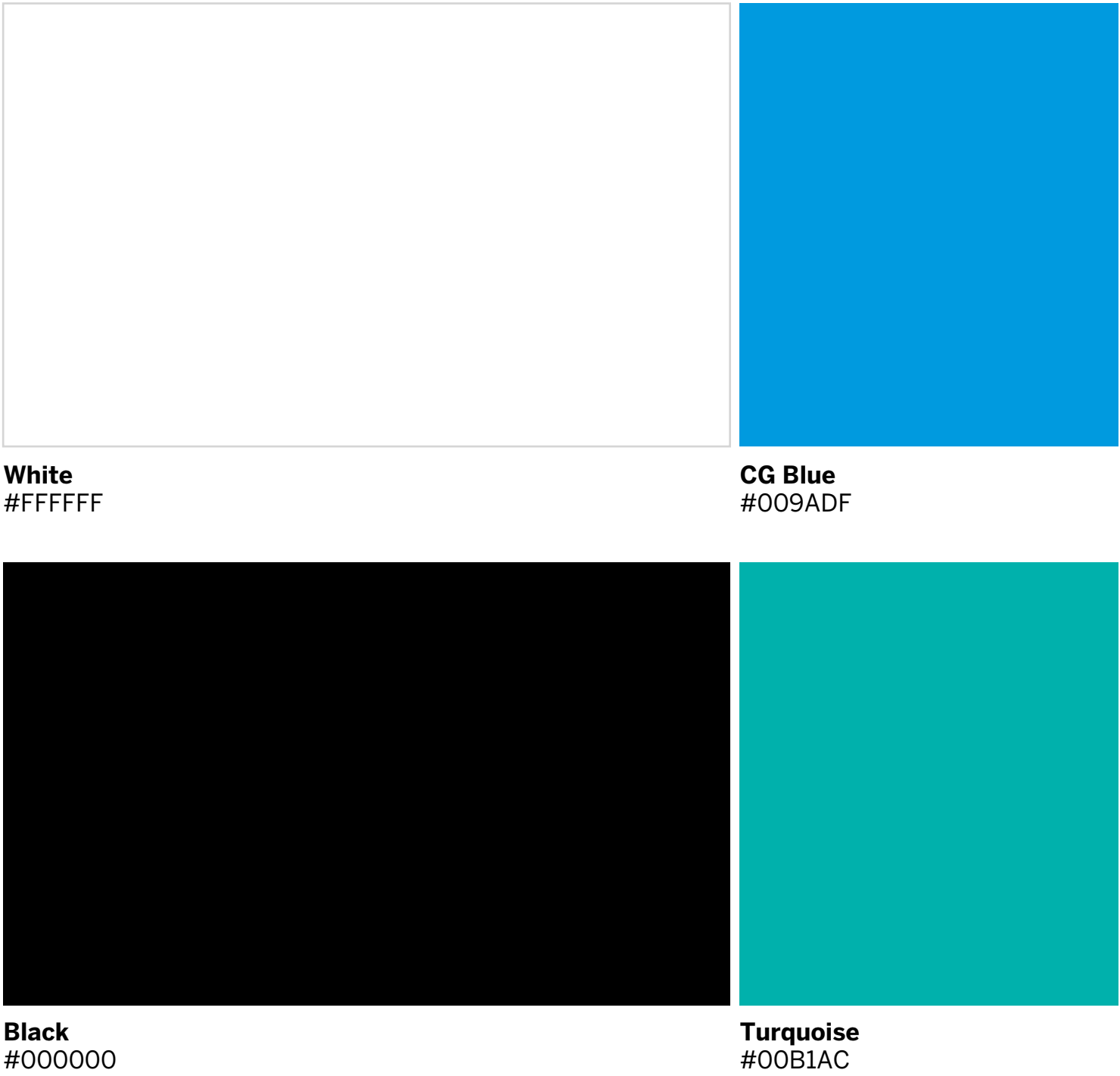


The Dynamic Aperture acts as a **connection** between text and image.



Color and typography have been defined by feedback from the CG brand team.

Color:



Typography:

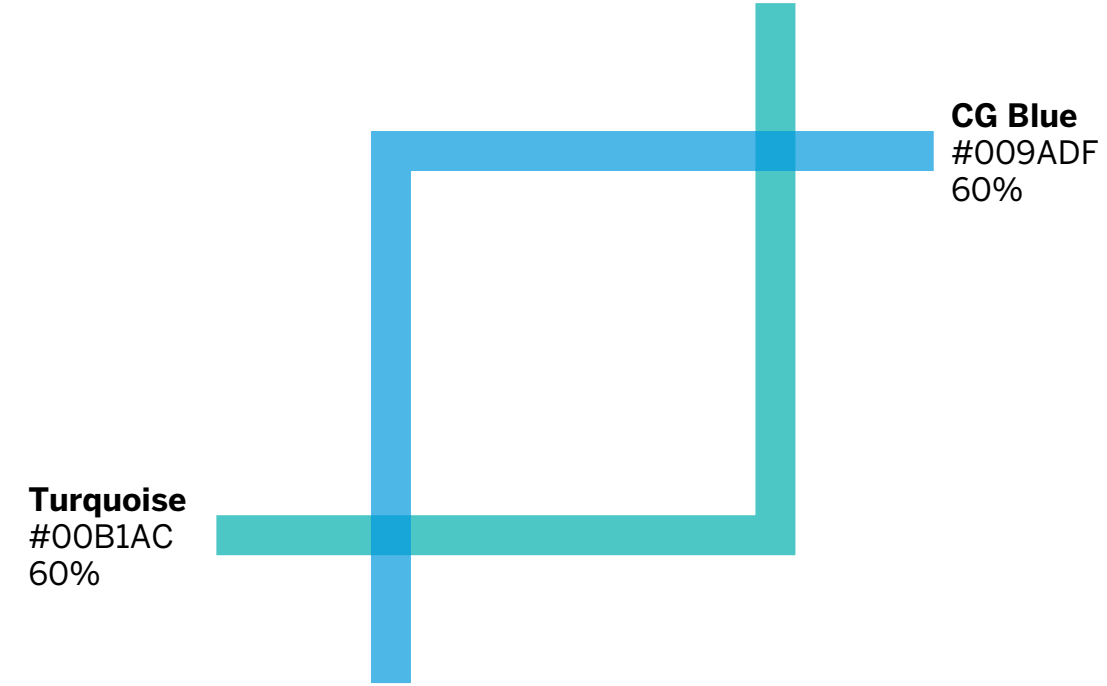
Avenir Next Bold
Avenir Next Demi Bold
Avenir Next Medium
Avenir Next Regular

Button styles:

- 1. 
- 2. 
- 3. 

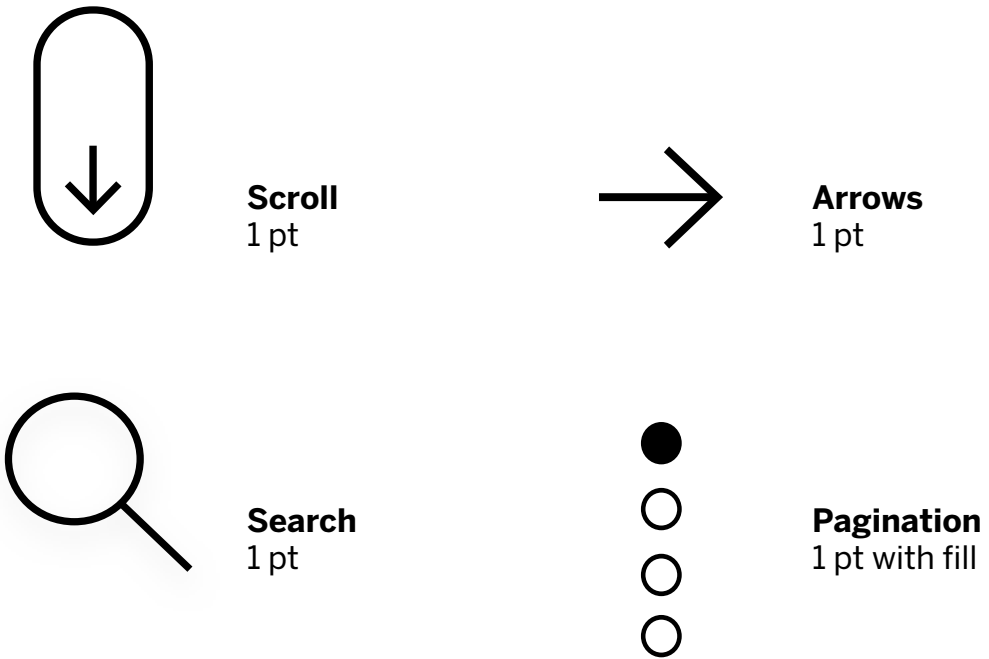
Simple black and white with arrow and/or drop shadow (20%, 0x, 2y, 4 blur, 0 spread)

Aperture:

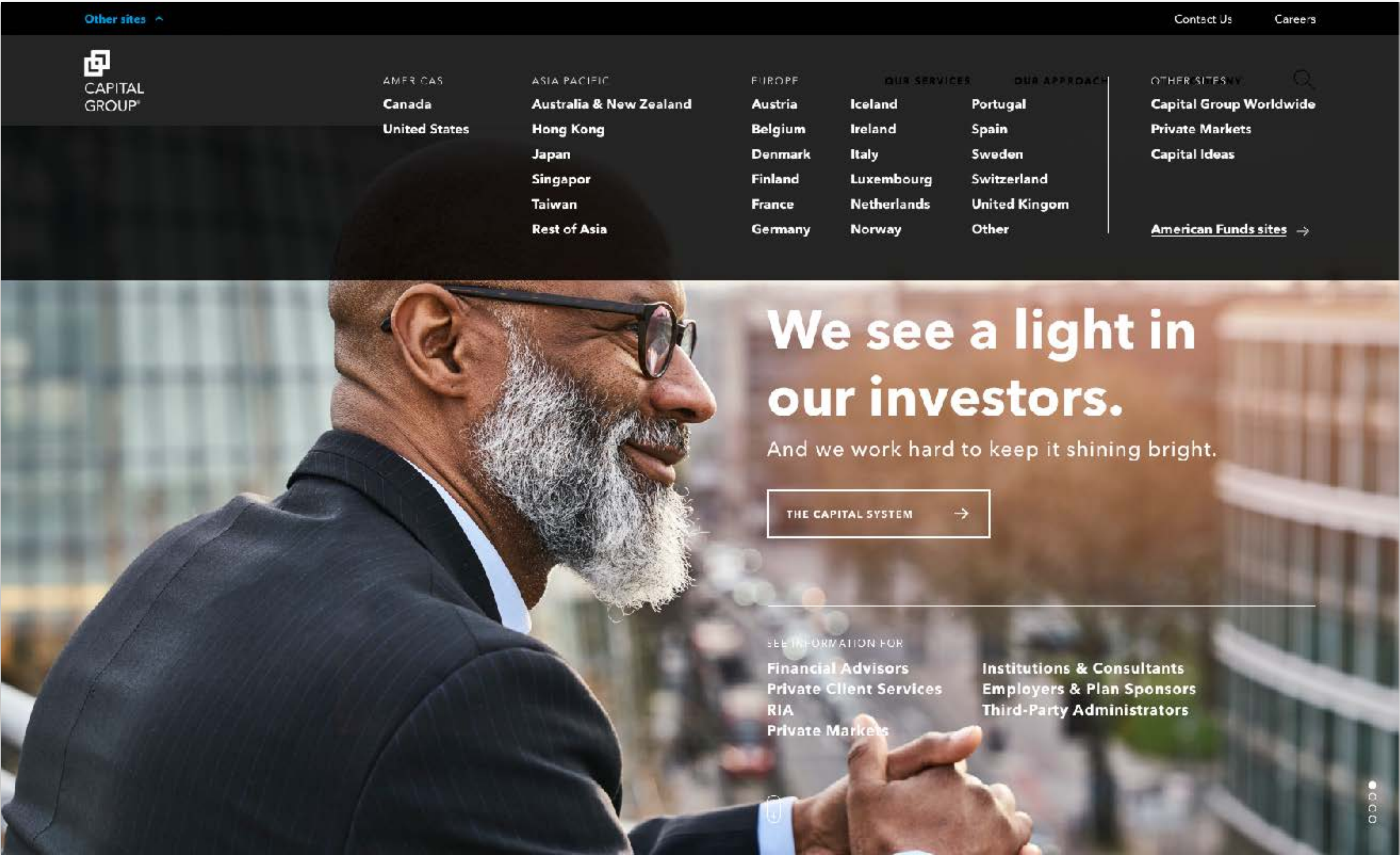


Desktop: **8x** Tablet: **8x** Mobile: **5x**

Icons:




1 pt lines, blunt ends




The screenshot displays the Capital Group website homepage. At the top, there is a dark navigation bar with 'Institutions' on the left and 'Login', 'Preferences', and 'Contact Us' on the right. Below this is a white navigation bar with the Capital Group logo on the left and a menu of 'ACCOUNTS', 'INVESTMENTS', 'CLIENT SOLUTIONS', 'INSIGHTS', 'EVENTS', and 'ABOUT US' in the center, with a search icon on the right. The main content area features a large 'Investments' section on the left with a 'See all Investments' link. To the right, there are four columns of links: 'INVESTMENT STRATEGIES' (By Objective, By Asset Type, By Vehicle, All Strategies), 'AMERICAN FUNDS DATA' (Returns, Daily Prices & Yields, Literature, Symbols & Fund Numbers, Share Class Information, Historical Prices, Historical Distributions, Fund Holdings Search), 'FUND RESEARCH TOOLS' (Fund Screener, Compare Funds, Target Date ProView: Evaluate TDFs, Download Data, Investment Tracker), and 'OTHER RESOURCES' (Quarterly Attribution & Commentary). The hero section below features a profile of a man with a grey beard and the headline 'good decades' with a 'SEE OUR PHILOSOPHY' button. A 'RECENTLY VIEWED' section lists 'Defined Contribution', 'Defined Benefits', and 'Recordkeeper Direct'. A vertical scrollbar is visible on the right side of the page.

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Search →




Others hope for a good year. We prefer good decades

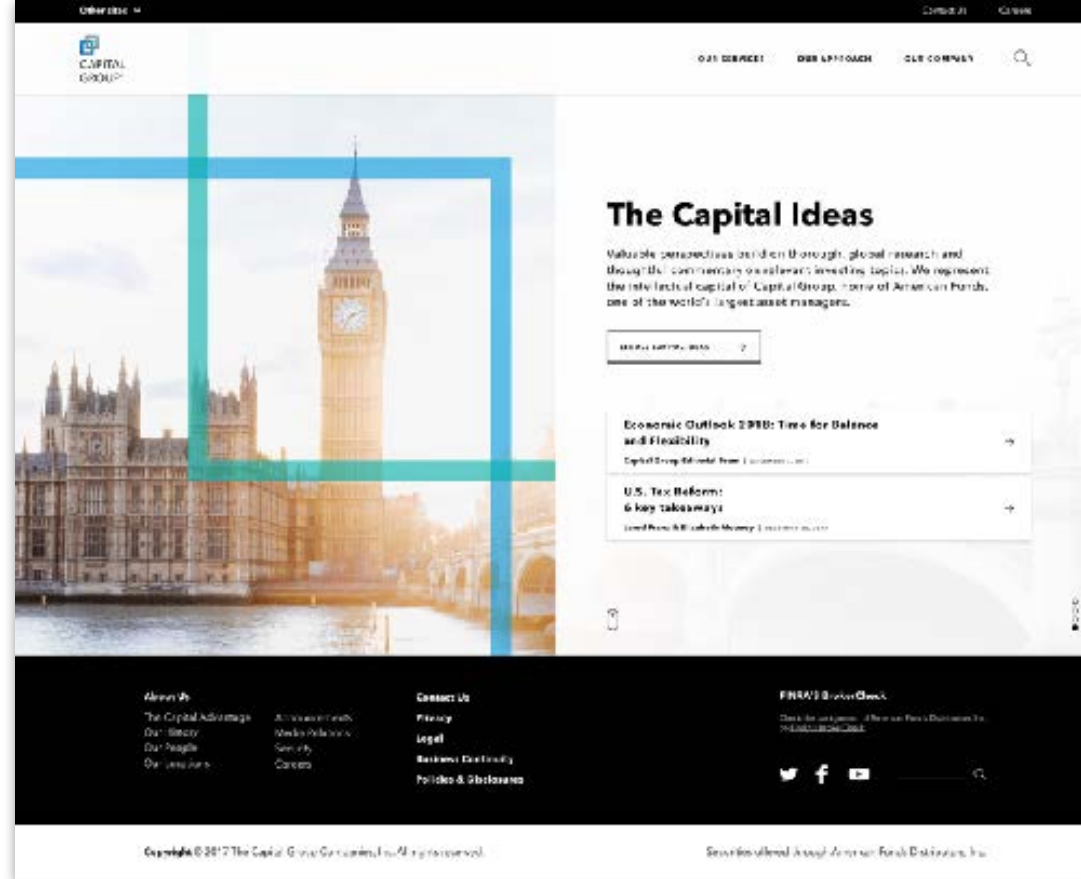
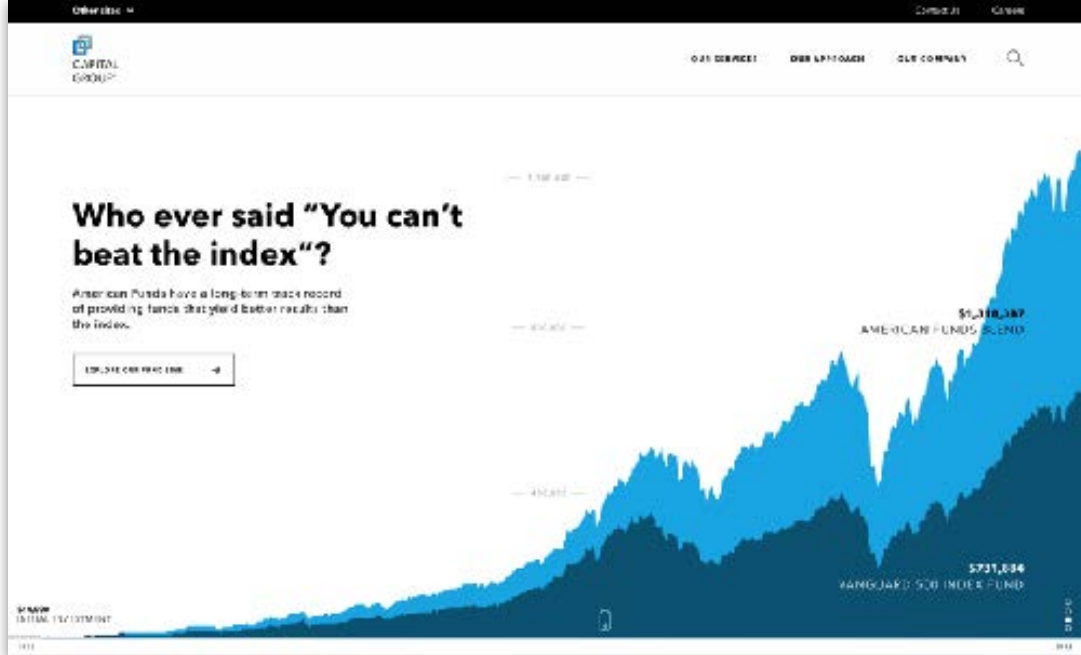
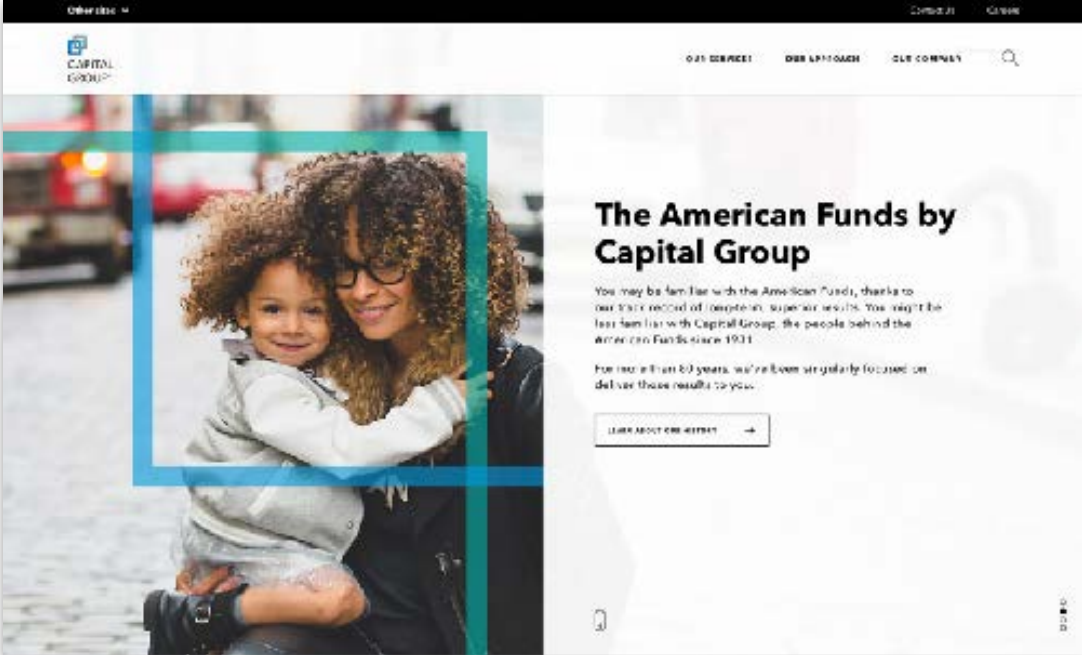
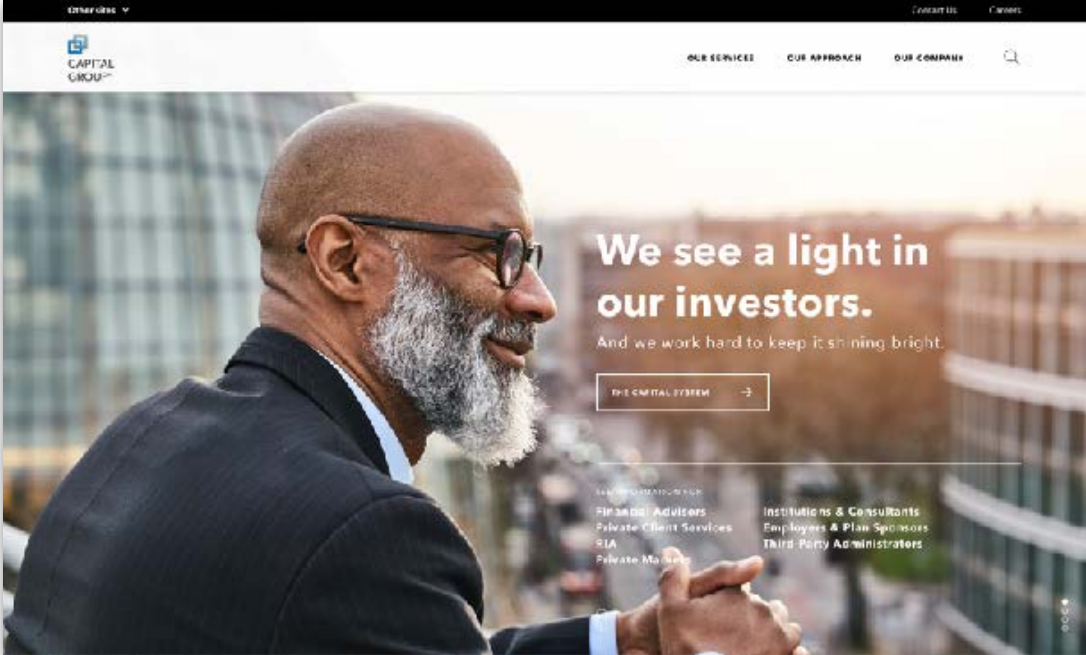
[SEE OUR PHILOSOPHY →](#)

RECENTLY VIEWED

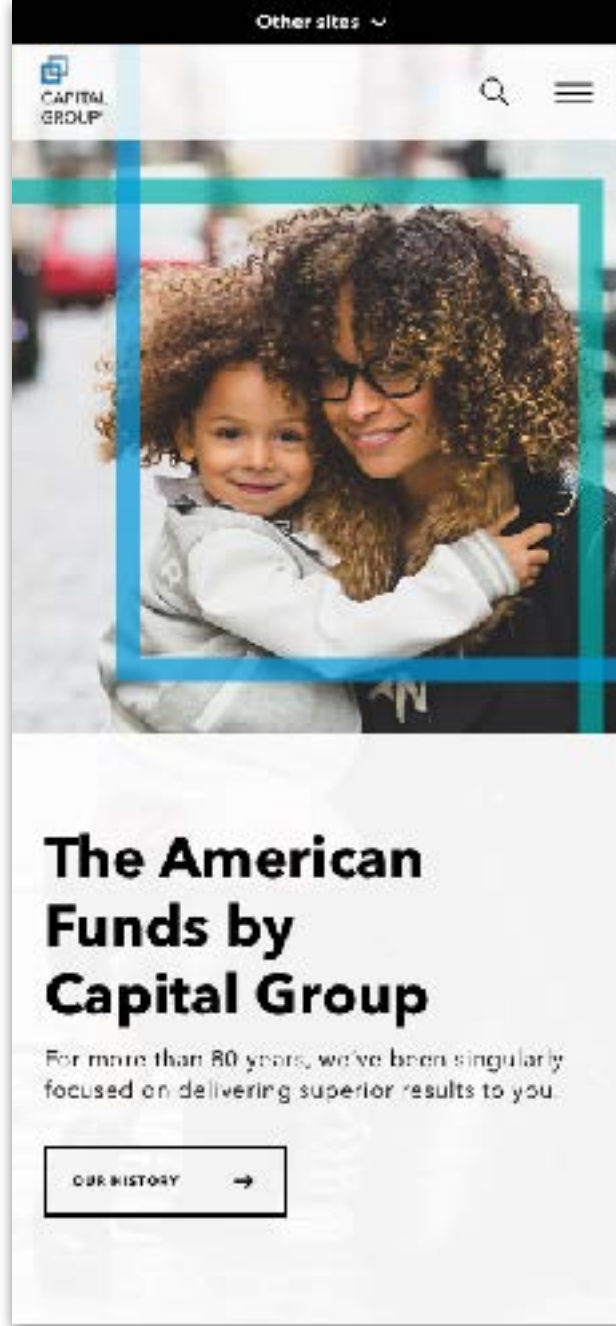
- Defined Contribution
- Defined Benefits
- Recordkeeper Direct



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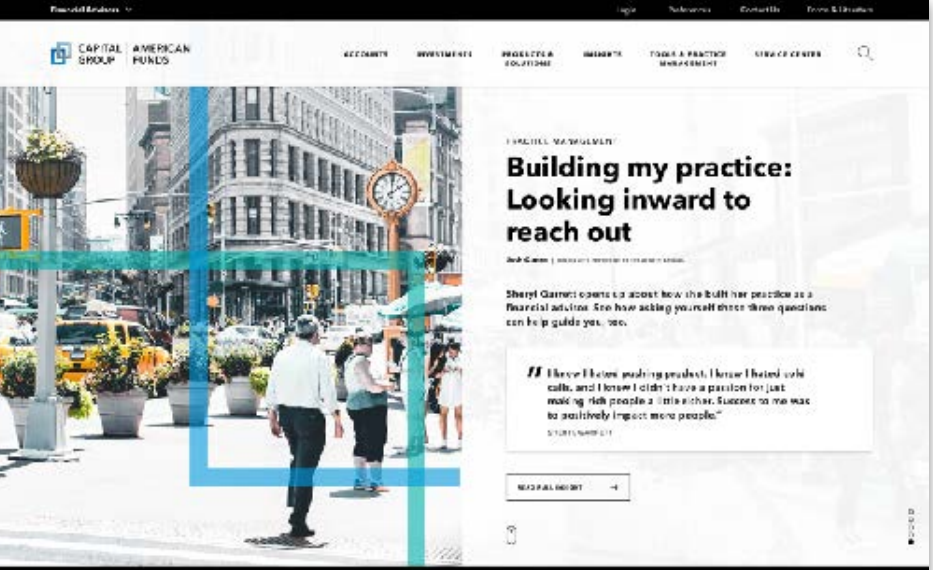
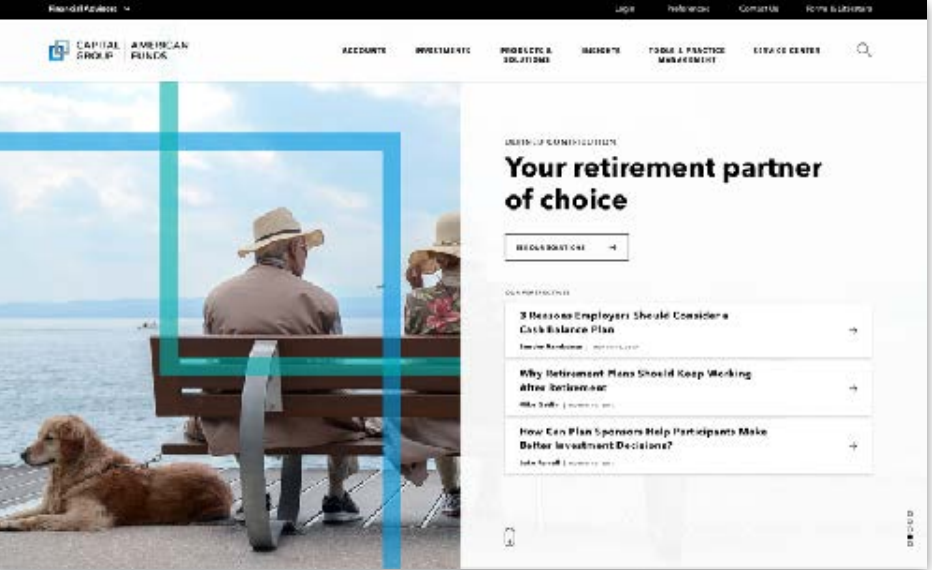
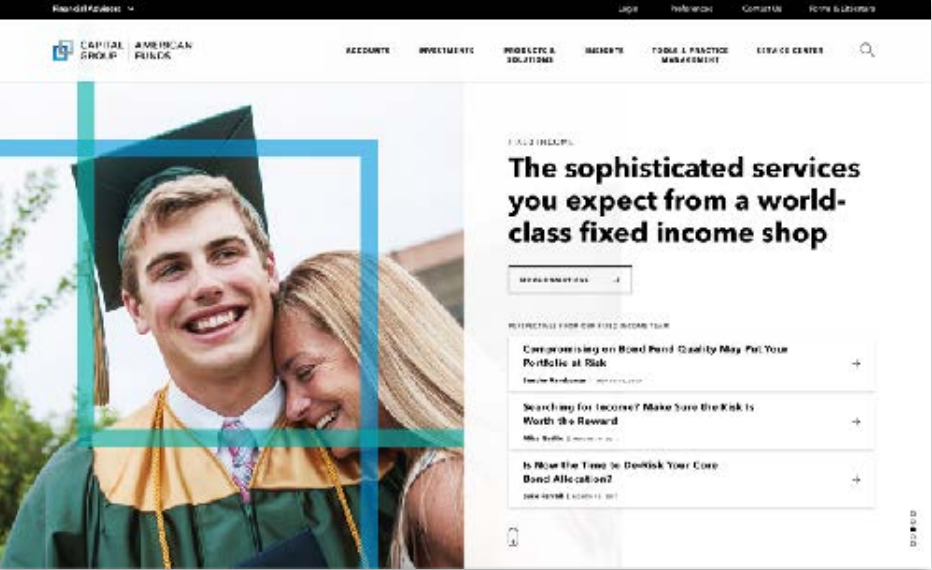
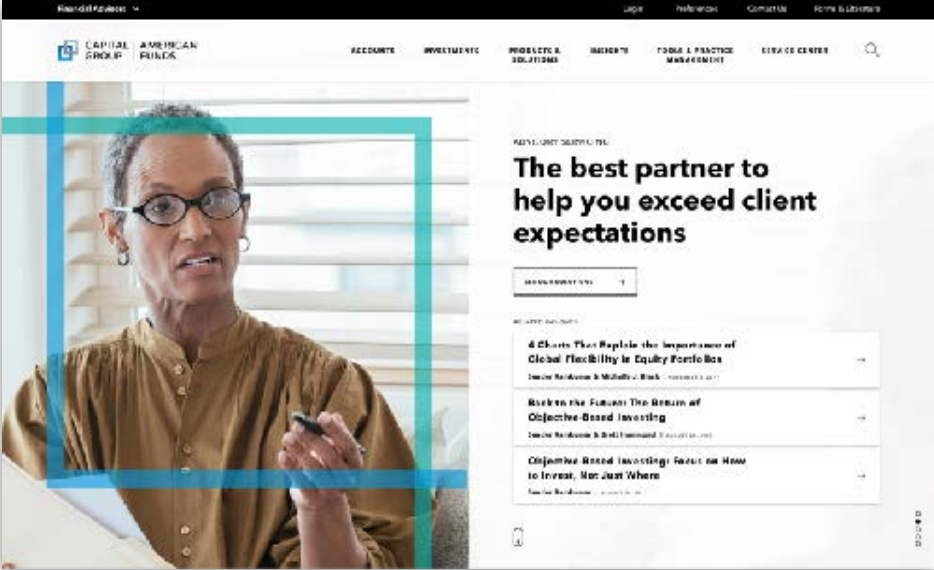
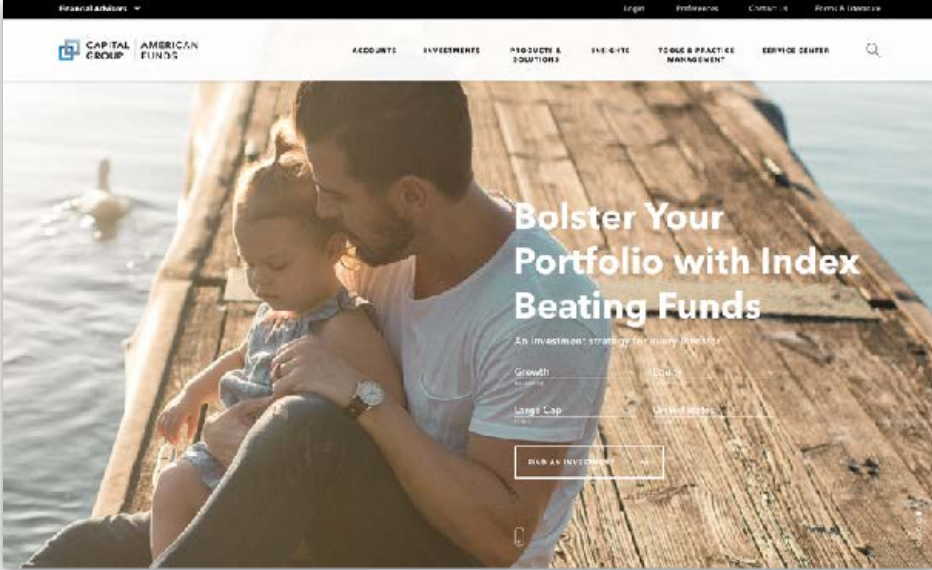


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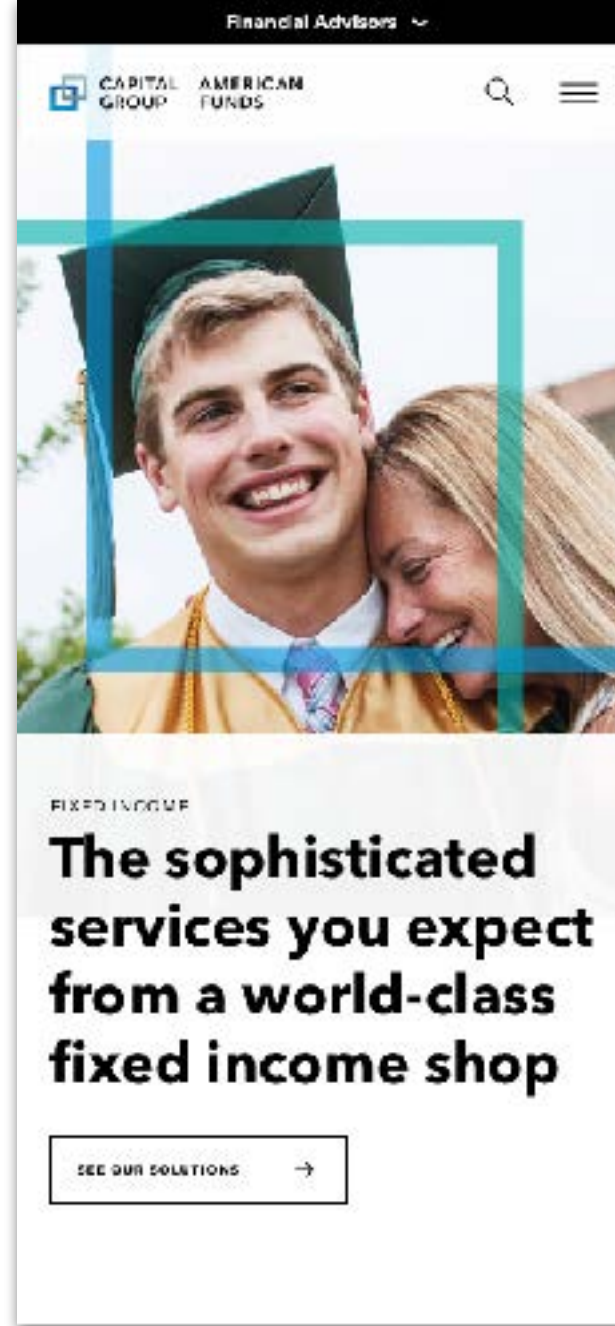
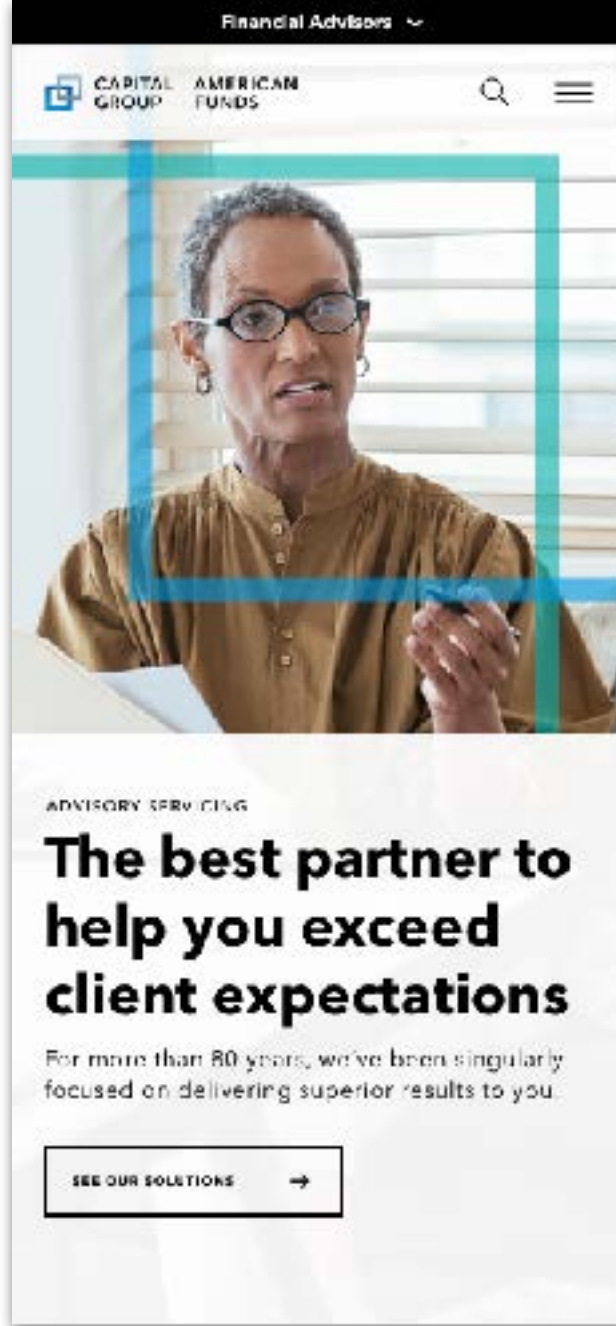
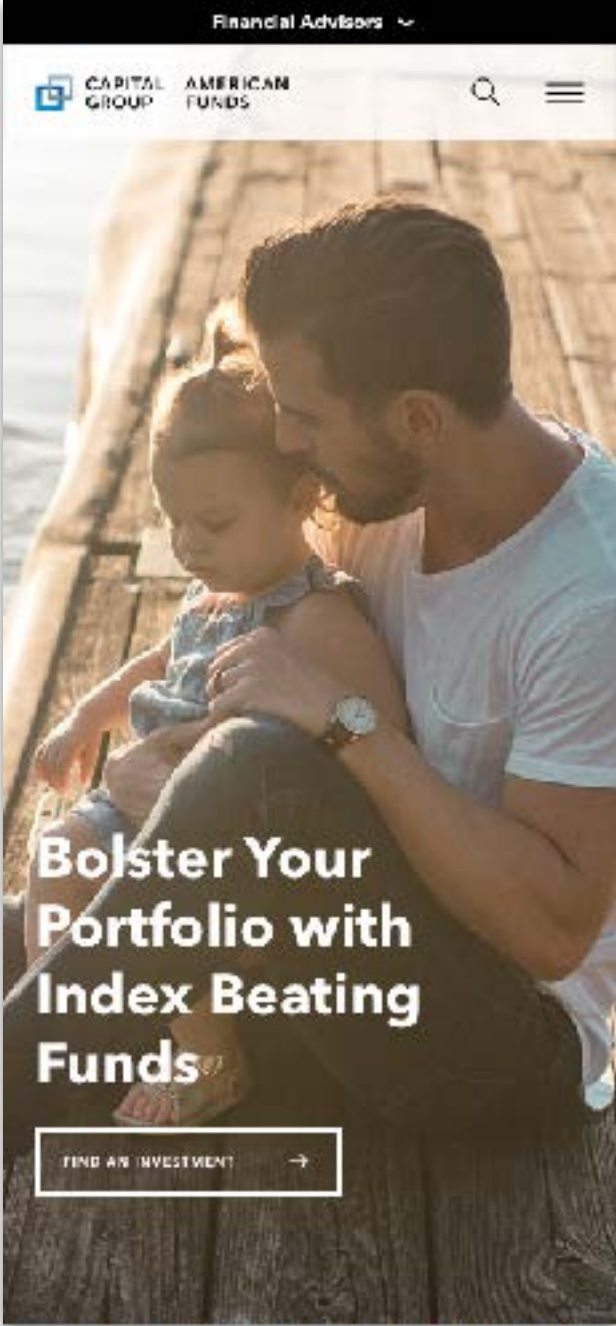


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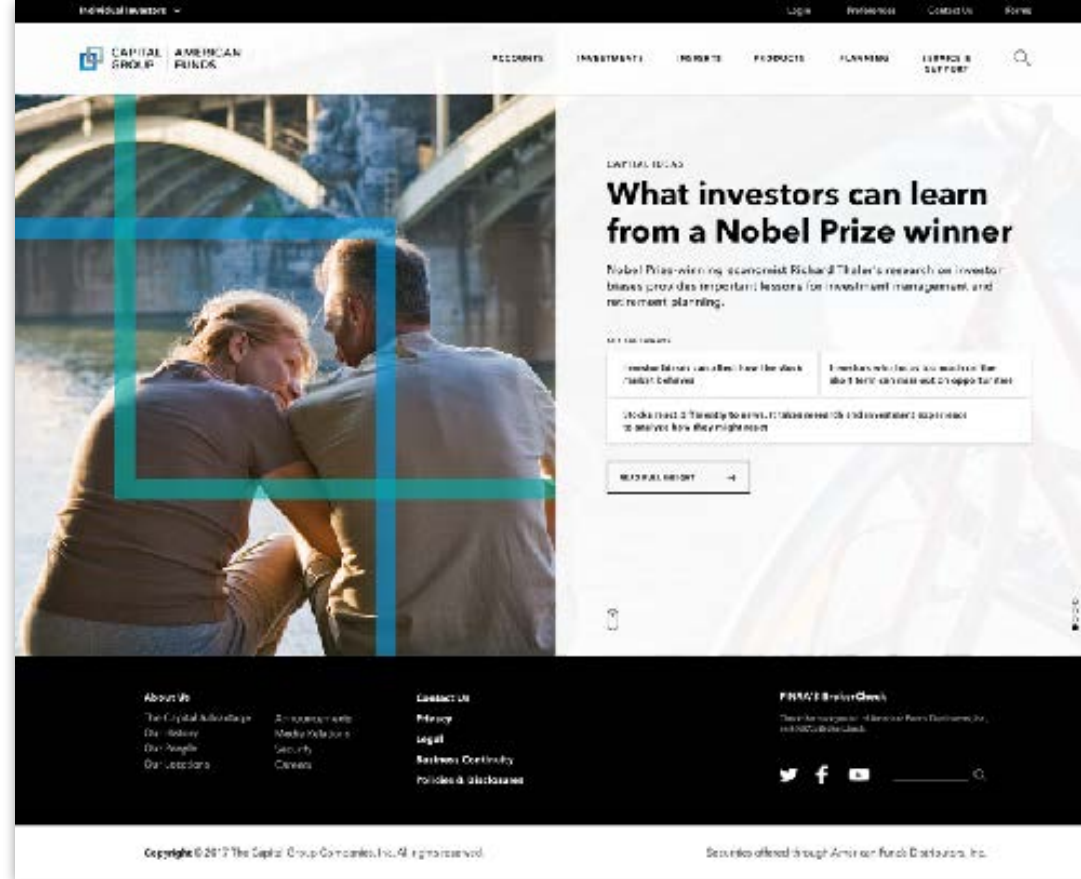
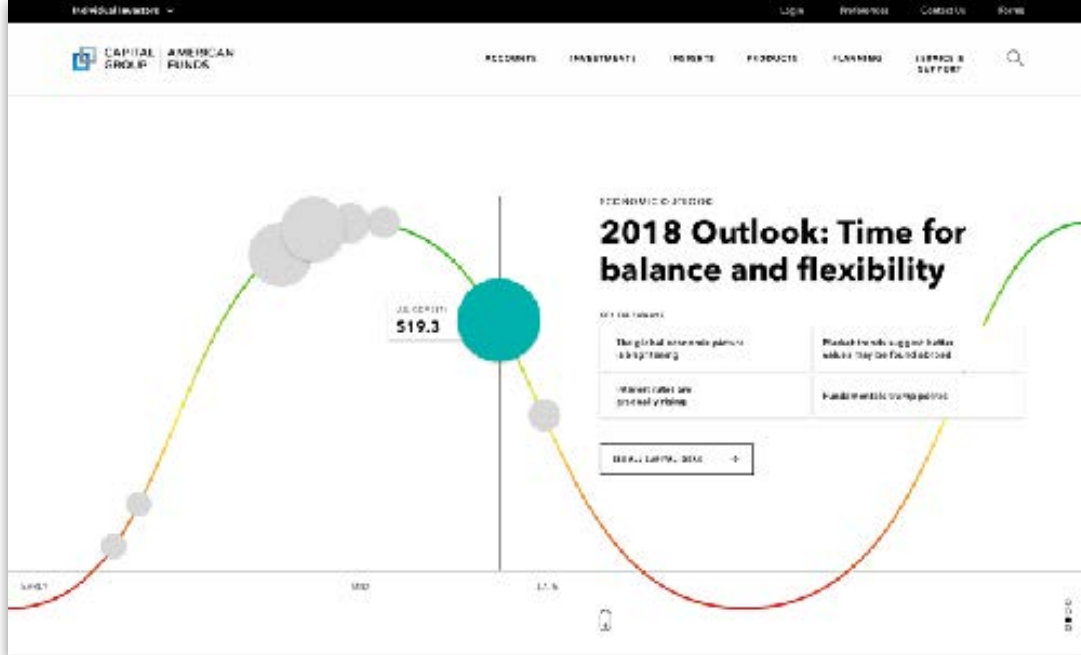
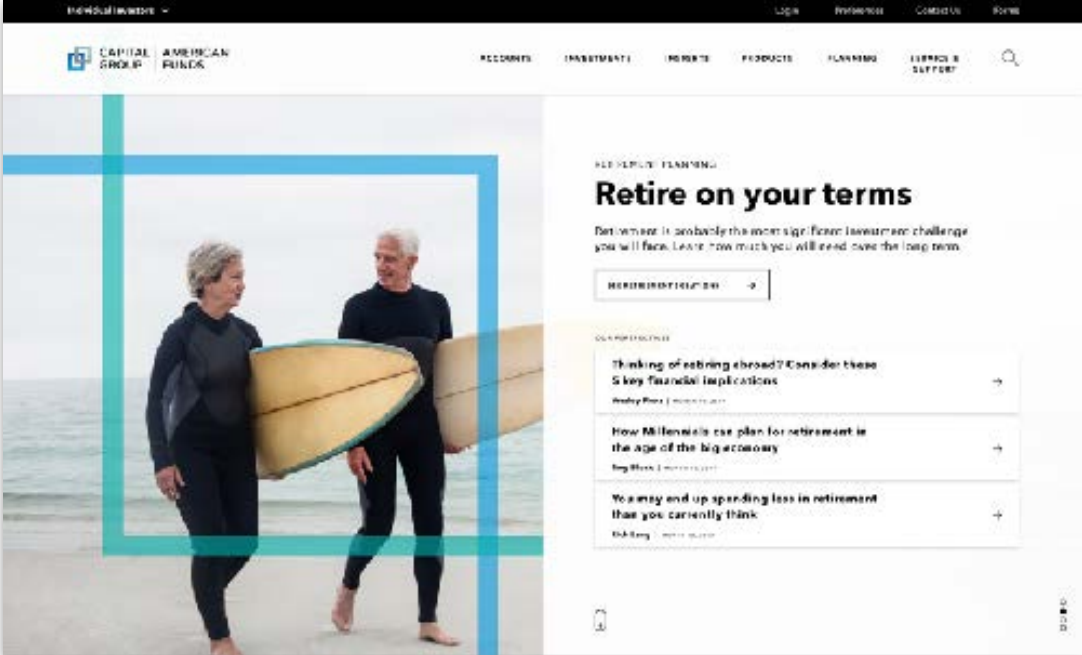
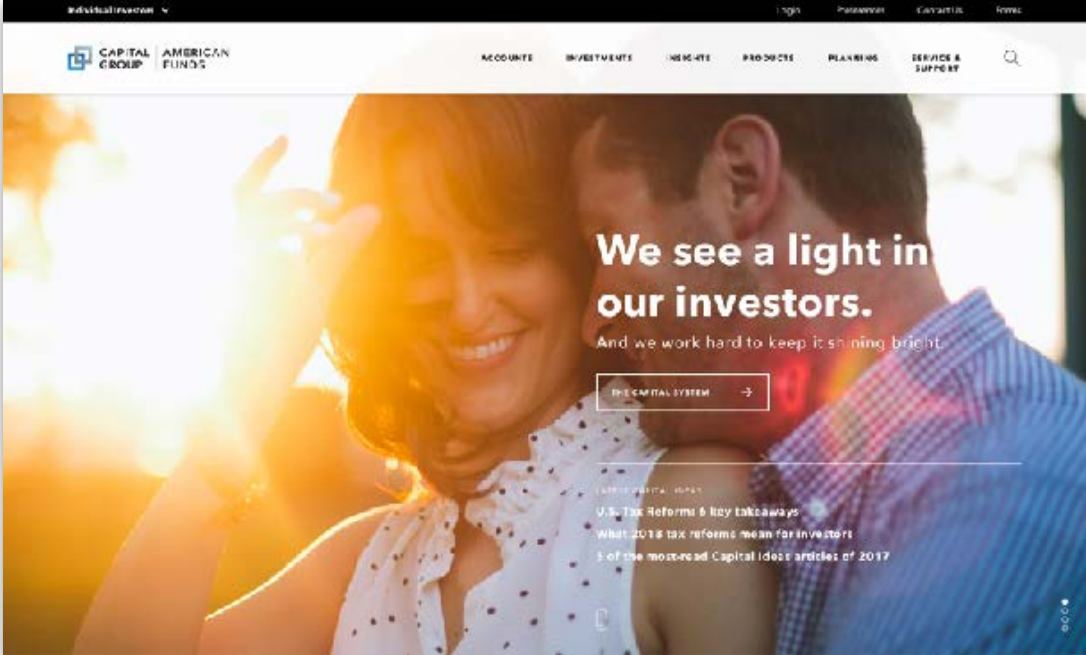
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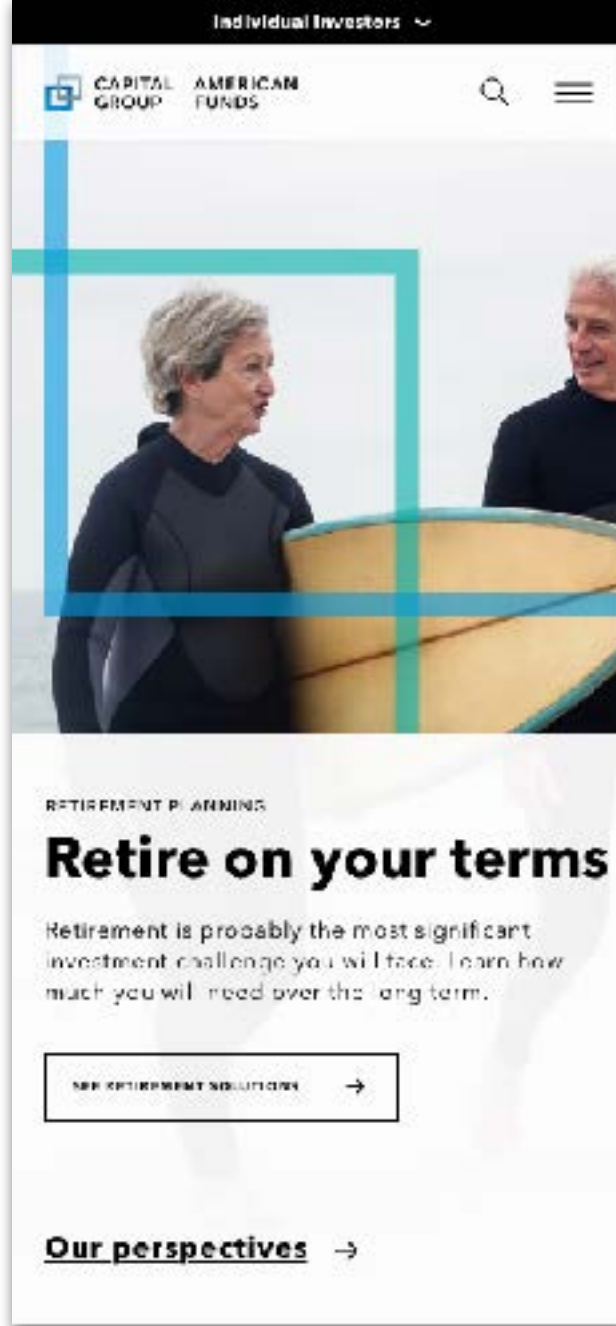


Homepage | Individual Investors

DESKTOP



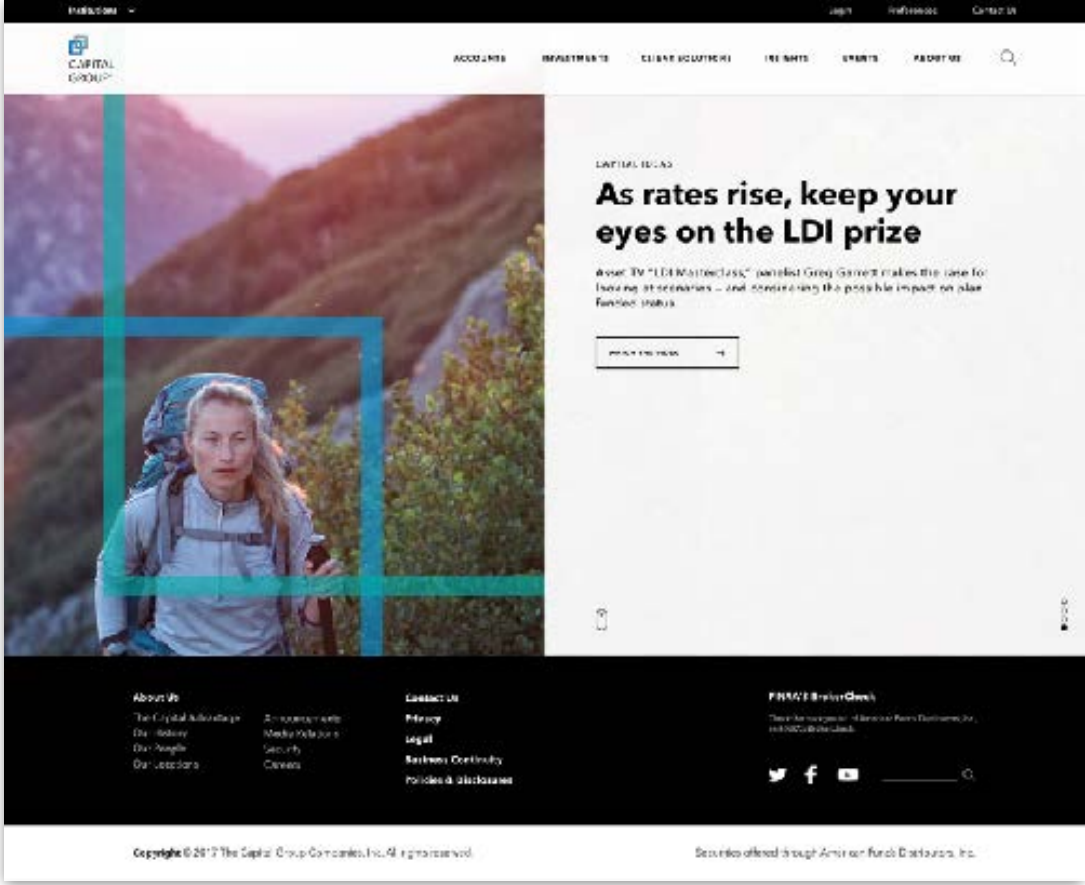
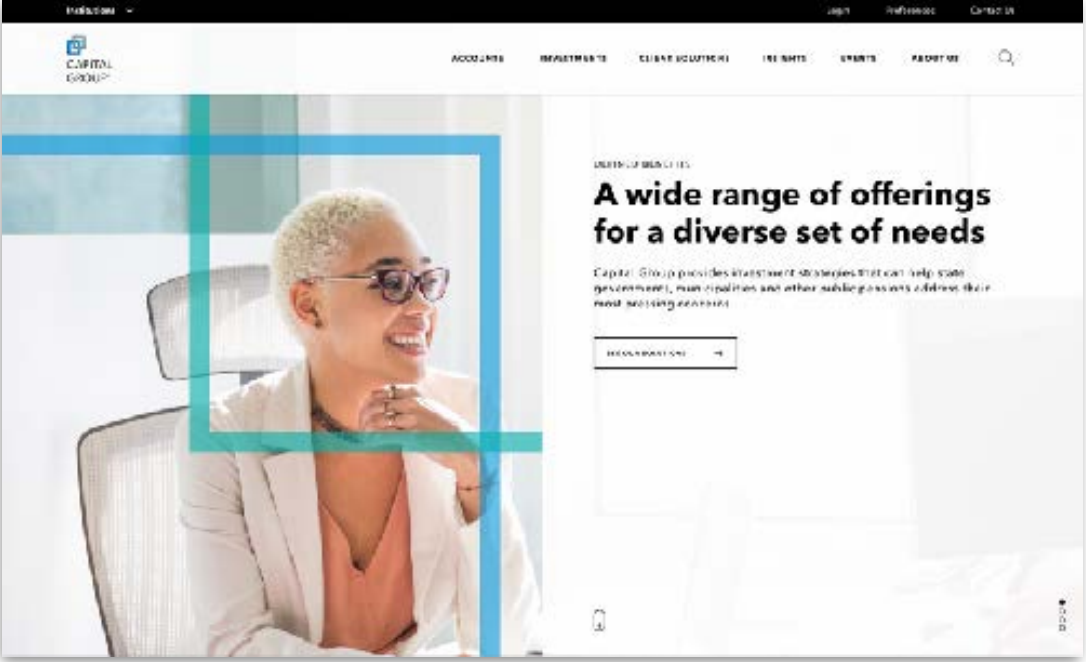
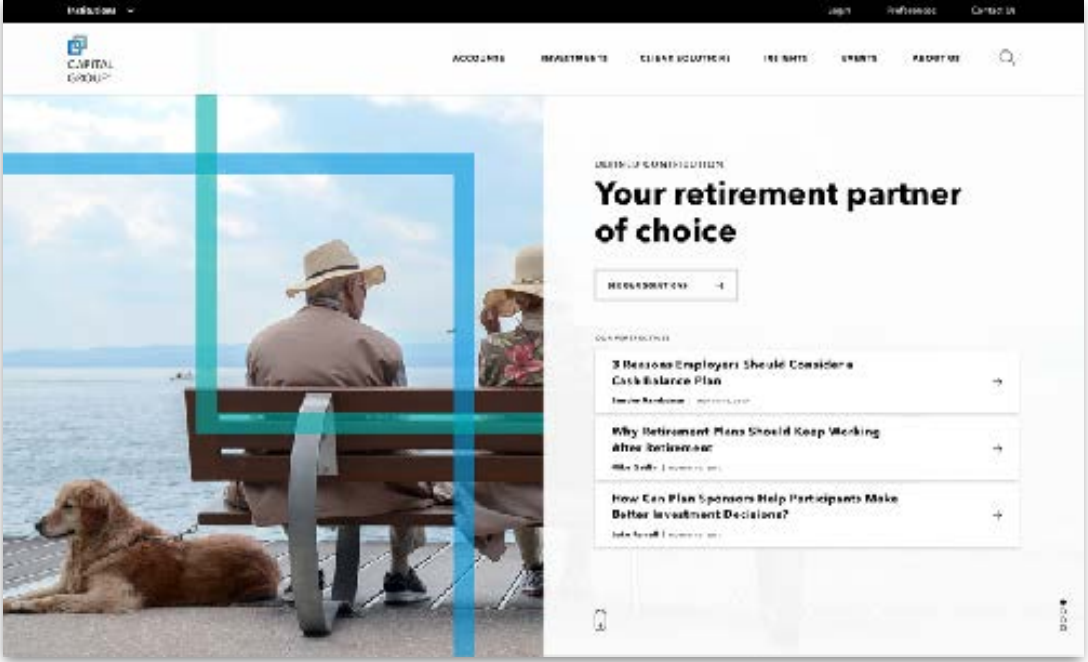
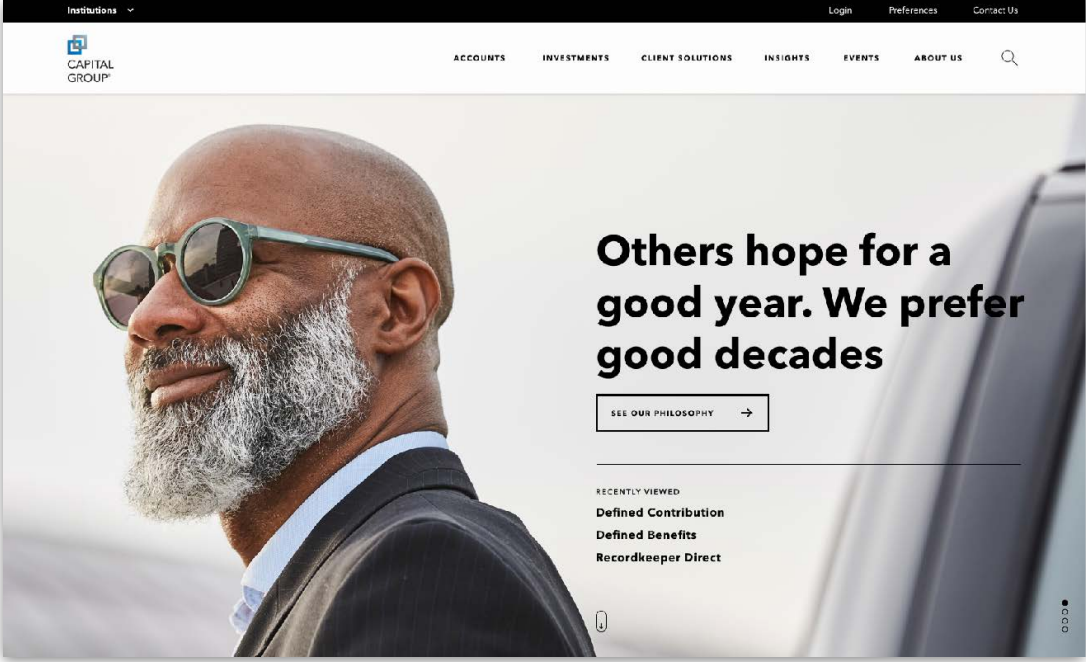
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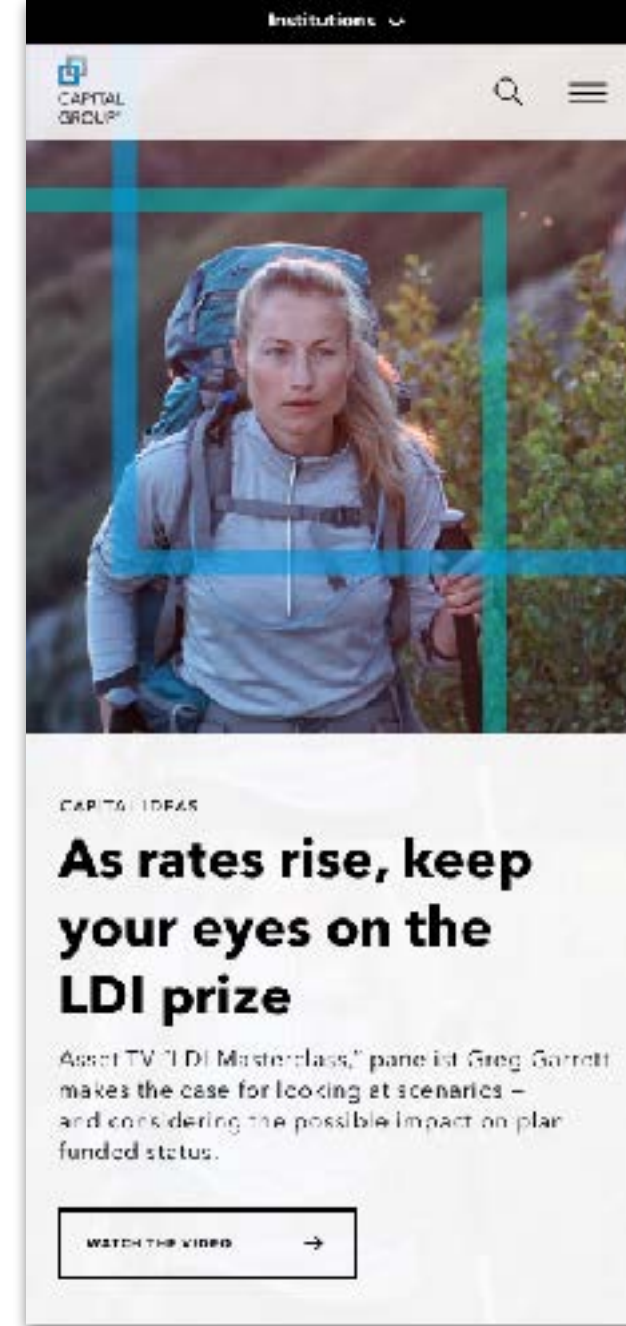
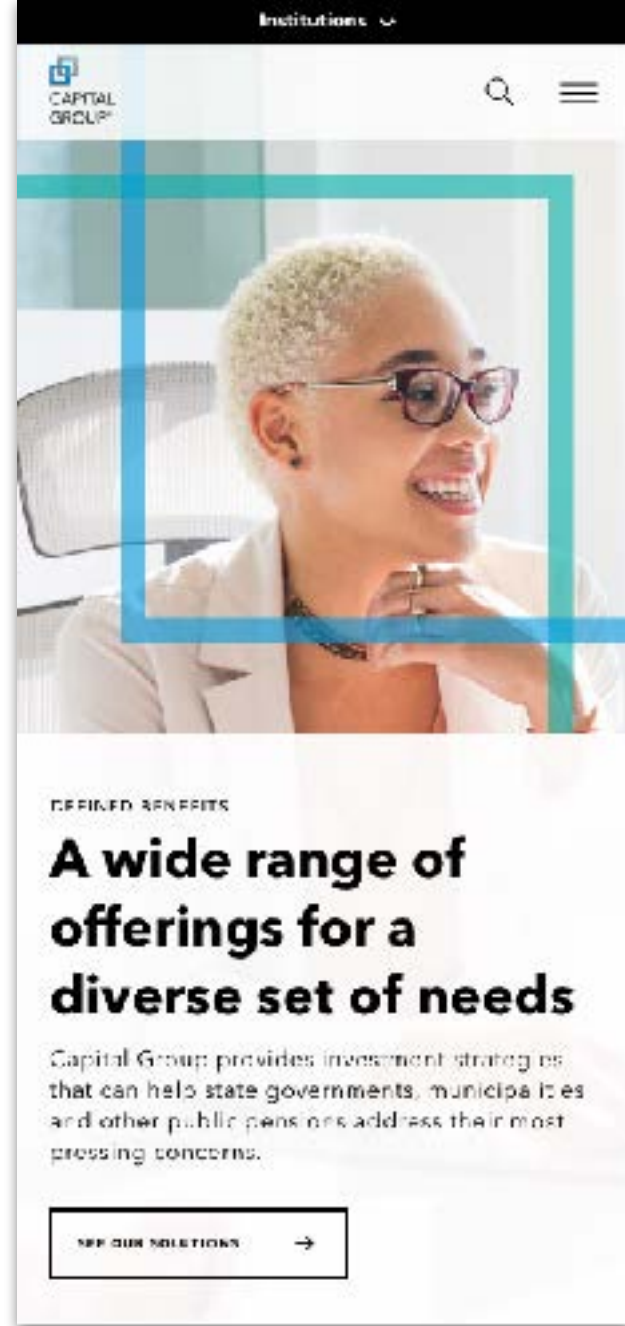
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



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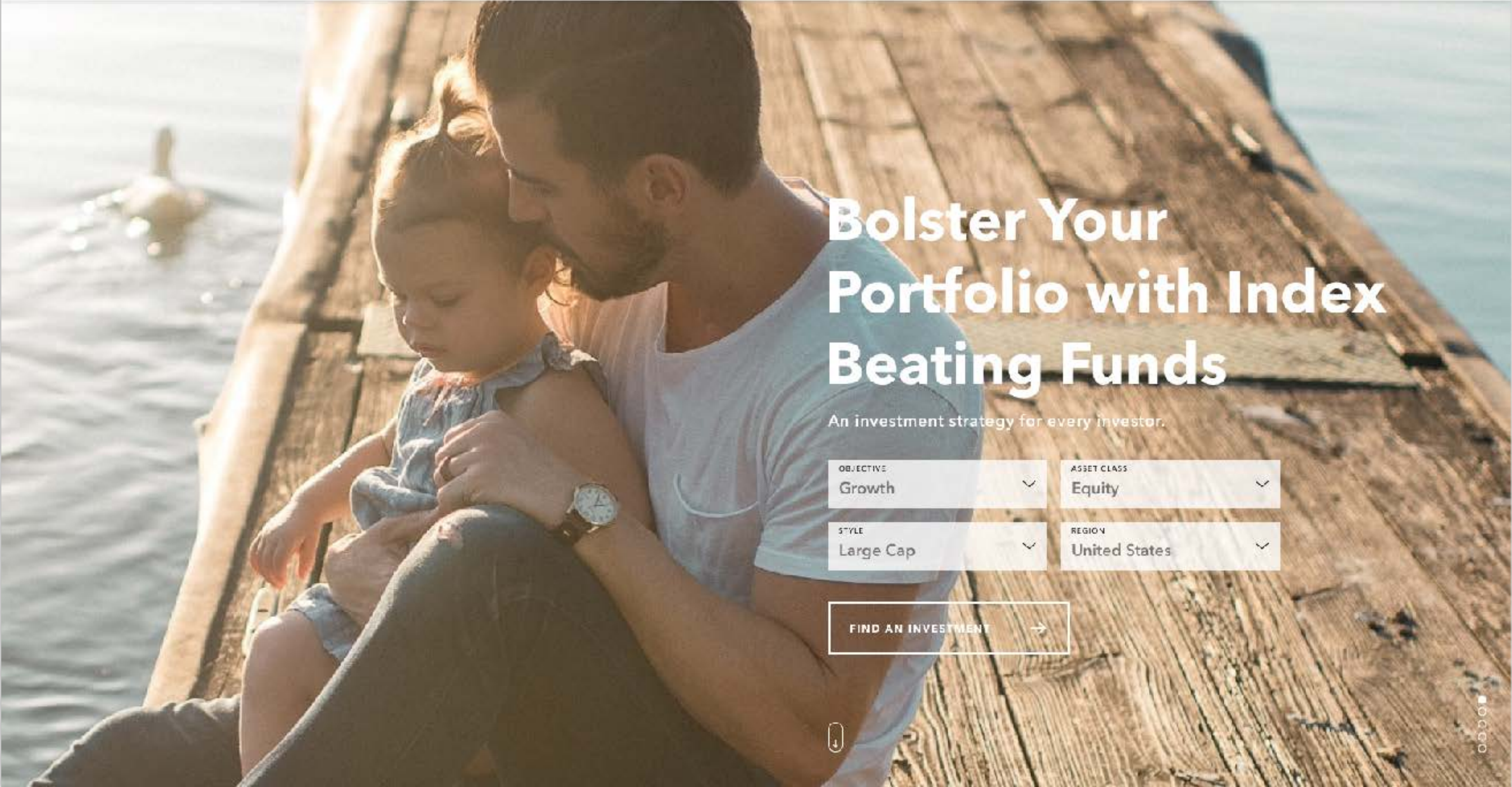
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Others hope for a good year. We prefer good decades

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- Defined Benefits
- Recordkeeper Direct

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