March 11 & 12, 2018

Future Vision & Road-Mapping Work Session

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+

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

Front Door(s) Redesign → **STAGE 1 LAUNCH**

- Updated Digital Brand Expression
- Content Development
- Detailed design for all home pages
- Visual Refresh Prioritized Pages

WORKSTREAM 2 - UNIFICATION & VISUAL REFRESH

Visual Refresh Template Design

- Design all landing pages under consolidated site
- Library of visual page templates (20 - 30 pages?)
- Style Guide & Pattern Library

Unified Site Structure & Content Migration → **STAGE 2 LAUNCH**

- Update CMS
- Final Site Structure/Nav
- Implement Visual Refresh
- Migration to Unified Site

WORKSTREAM 3 - VISION & WEB TRANSFORMATION

Vision & Long-Term Roadmap (using Advisory, deep dive)

- Identify prioritized "stimuli"
- Design against stimuli, applying best practices
- Define transformative experience using illustrative examples
- Document requirements & capabilities needed to support experiences
- Roadmap based on larger digital initiatives

ex: High-priority, Stimulus-based Use Cases + Personalization → **ON-GOING DEPLOYMENTS –>**

ex: Insights

ex: Theme Pages

ex: Smart Search

etc

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

Capital System / Our Process

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

FINANCIAL ADVISORS

Home Page
+ Destination Pages

INSTITUTIONS & CONSULTANTS

Home Page
+ Destination Pages

DB
LDI

INDIVIDUAL INVESTORS

Home Page
+ Destination Pages

EMPLOYERS & PLAN SPONSORS

Home Page

THIRD-PARTY ADMINISTRATORS

Home Page

Investments

Investment Landing
https://www.americanfunds.com/advisor/investments

TBD
Fund Finder +
Fund Detail Pages

Primary Site Section Pages

Insights Landing
with Capital Ideas incorporated

Products / Products & Solutions / Client Solutions

Planning / Tools & Practice Management / Events

Forms & Literature

Search Results

Login

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 the 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

- **Registration**
- **subscriptions**
- **Briefcase**
- **marketing lab**
- **Titan**
- **Segmentation / personalization**
- Improved search
- **Showcase portfolio managers**
- **Enhanced contact-us**
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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

- Registration
- subscriptions
- Briefcase
- marketing lab
- Titan
- **Segmentation / personalization**
- Showcase portfolio managers
- Enhanced contact-us
- Content playlist
- Chat bot
- Micro surveys / polling

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

Marketing Lab

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

BLUE - part of RIA & Digital Prospecting work

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

- -

Stage 3 | Capabilities

GREEN - stage 3 first priorities

BLUE - Already assigned to another team. We help define the functional & design specs, they build

- **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
- Micro surveys / polling
- *CG book of business views (single view of the customer)*
  - *unified communication across audiences (case management)*
  - *customer facing & business facing*
- *connections to account service (TBD)*

Stage 3 | Capabilities

- Registration, ID mapping, profile, preferences
  - Single sign-on
- subscriptions
- concept formally known as briefcase
  - Content; favorites/bookmarks, multi-format
  - Tools; outputs from tools/services, needs architecture to be connected to the tools
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- marketing lab
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  - cognitive, user preferences
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- Interactive data/charts visualizations
- 'virtual' portfolio manager
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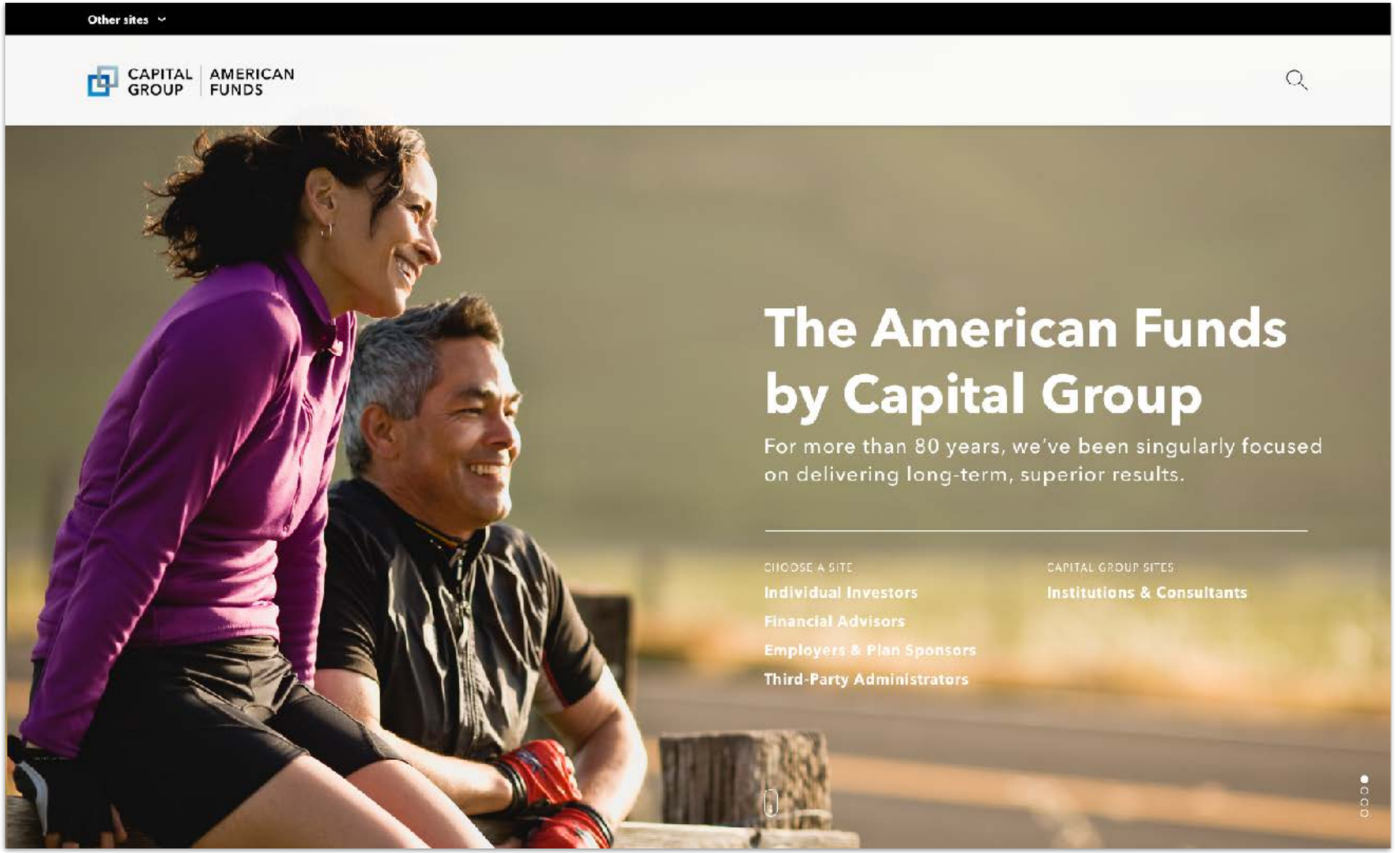
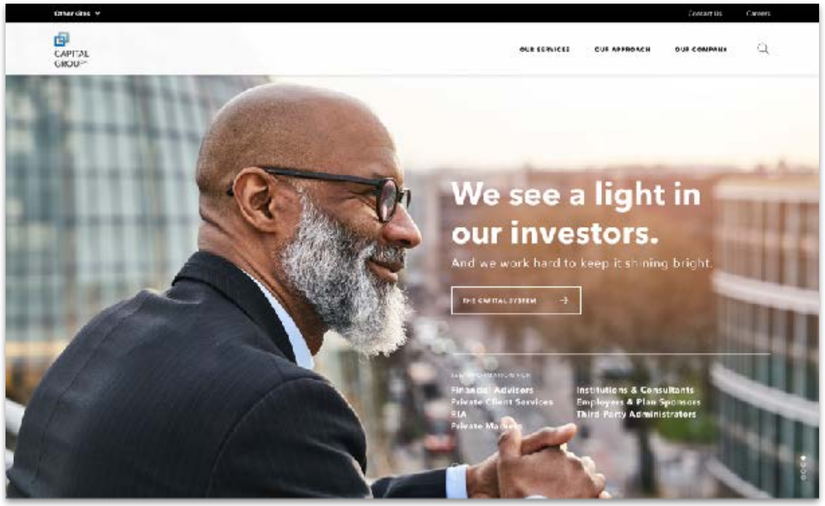
Homepage & Redesign Content Review

Homepage | AmericanFunds.com

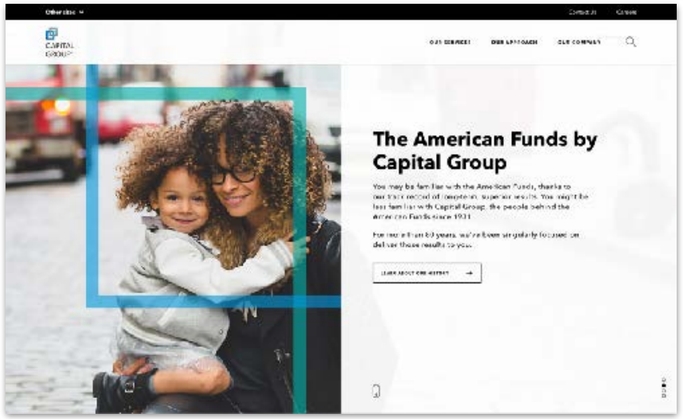


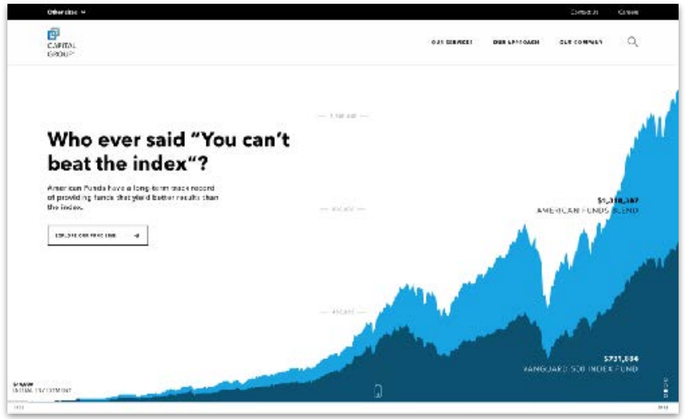
Homepage | CapitalGroup.com

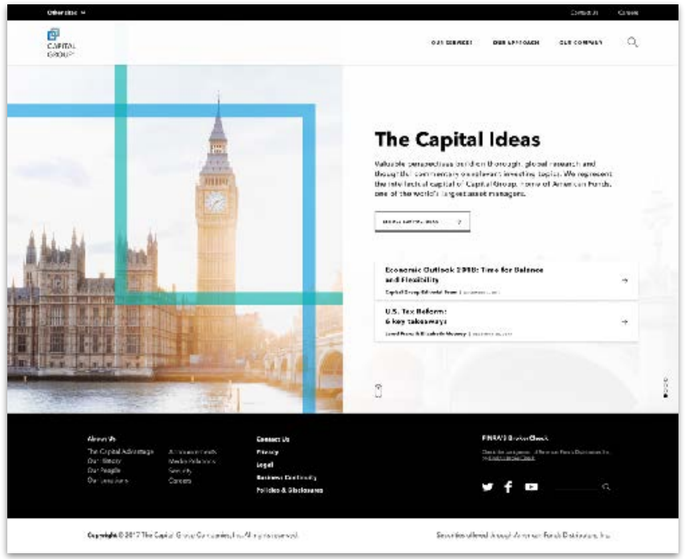


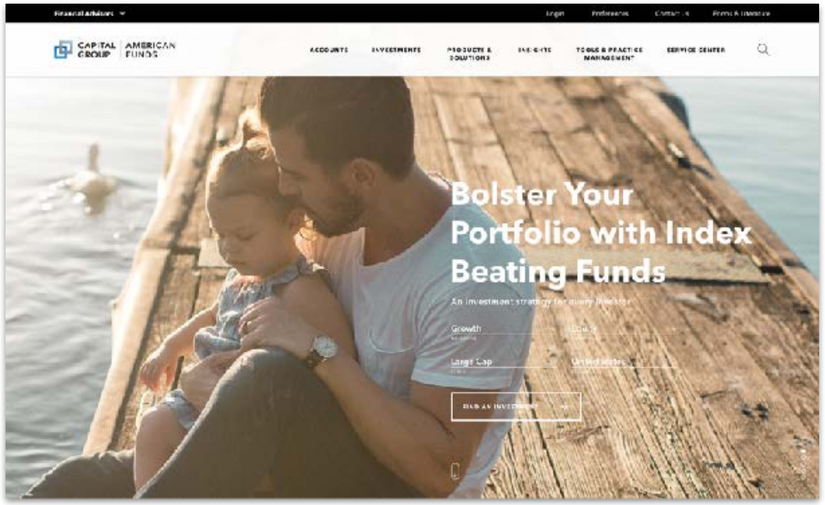
Topics:
1.Capital System
  1.Audience selector
2.Our People
3.Our Investments
4.Capital Ideas
5.Our History

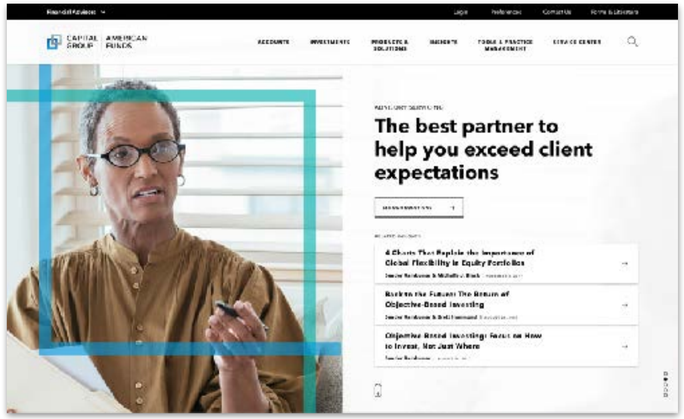
key
1.Net New
2.Re-design
3.Re-skin

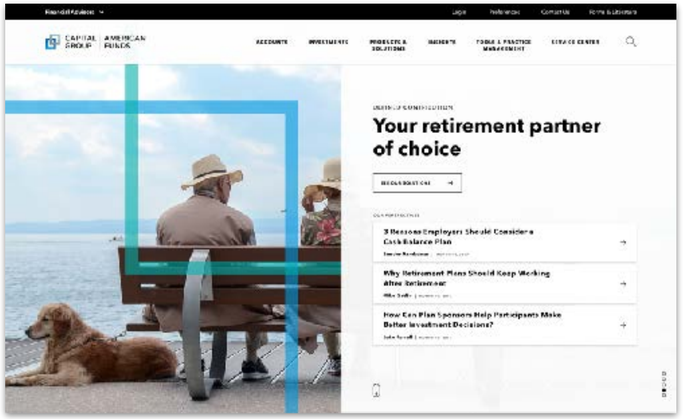


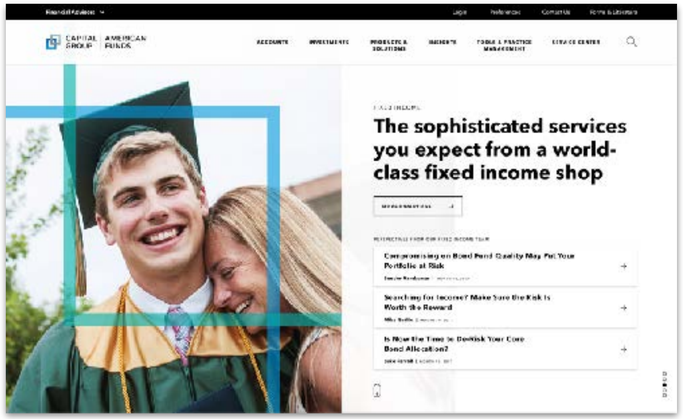


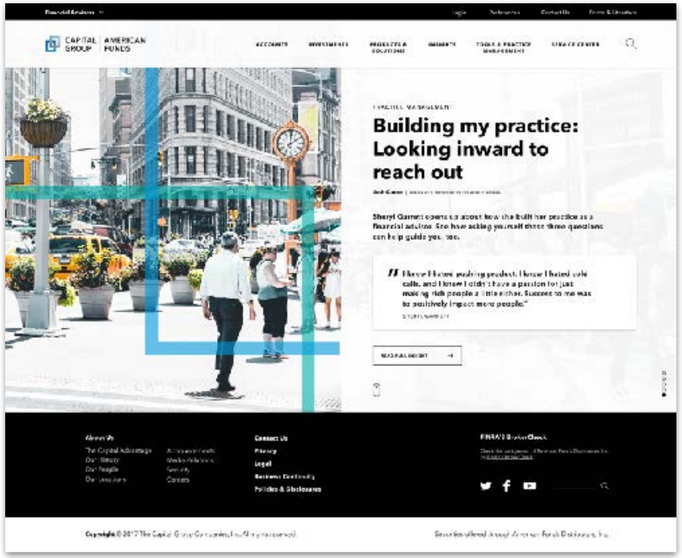








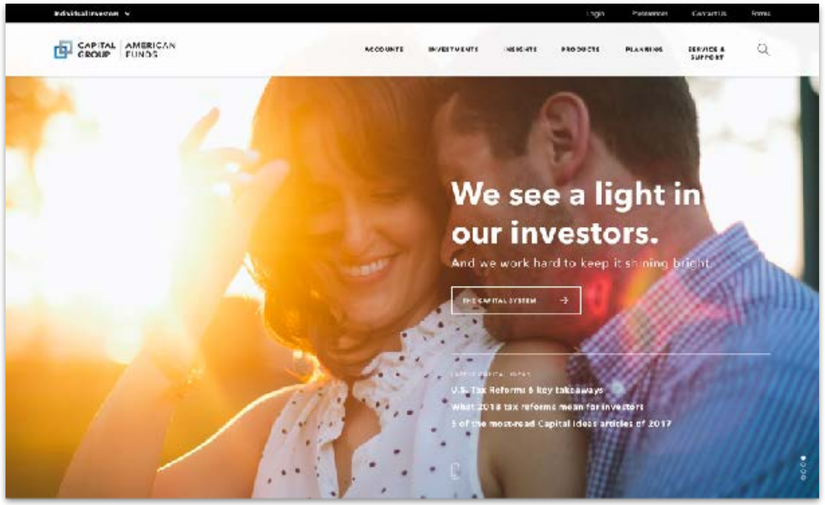




Topics:
1.Investments
2.Advisory Servicing
3.Fixed Income
4.Practice Management
5.Advisor sold retirement plans (IR)
  1.Defined Contribution

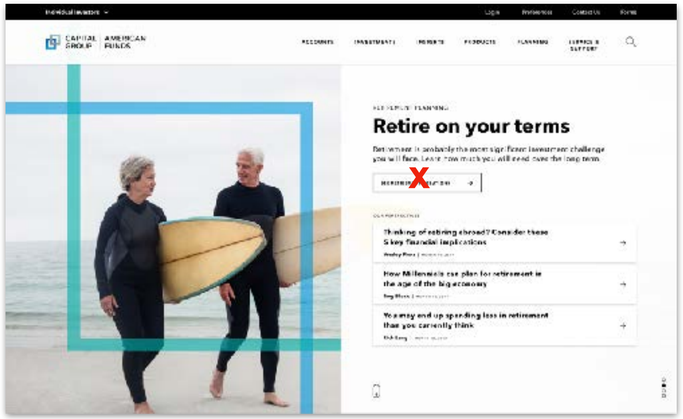
key
1.Net New
2.Re-design
3.Re-skin

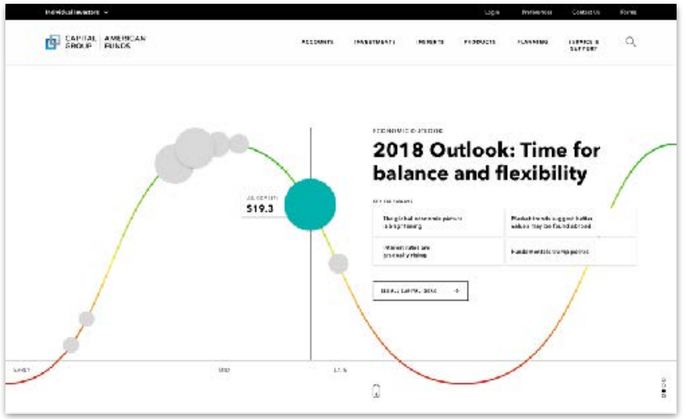
Homepage | Individual Investors

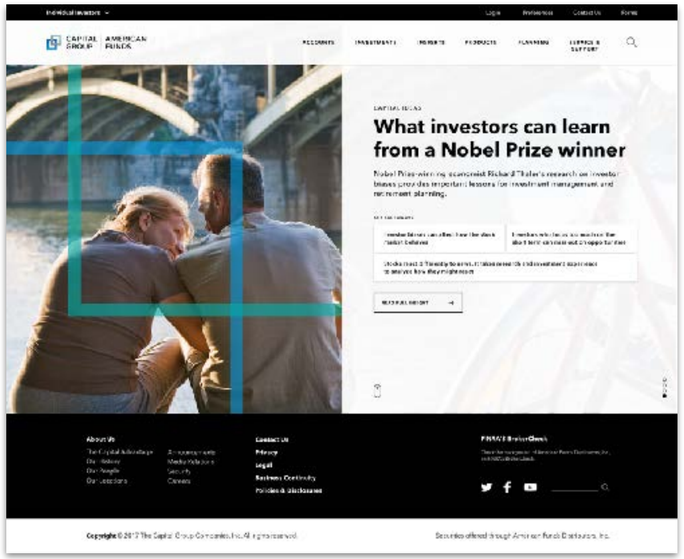


Topics:
1.Capital System (reskin)
2.Retirement (default)
3.Thought Leadership:
  1.Outlook
  2.Capital Ideas

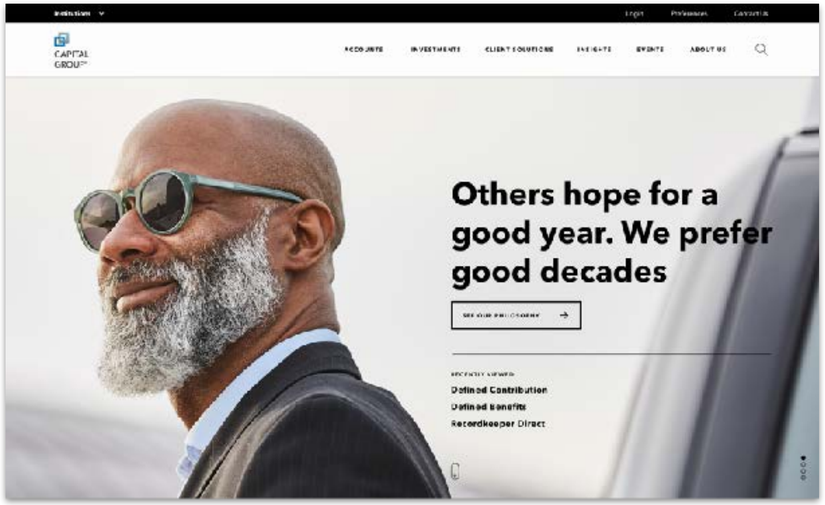
key
1.Net New
2.Re-design
3.Re-skin







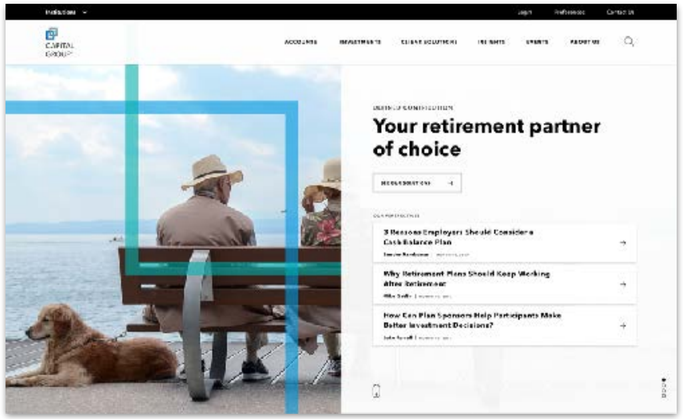
Homepage | Institutions & Consultants

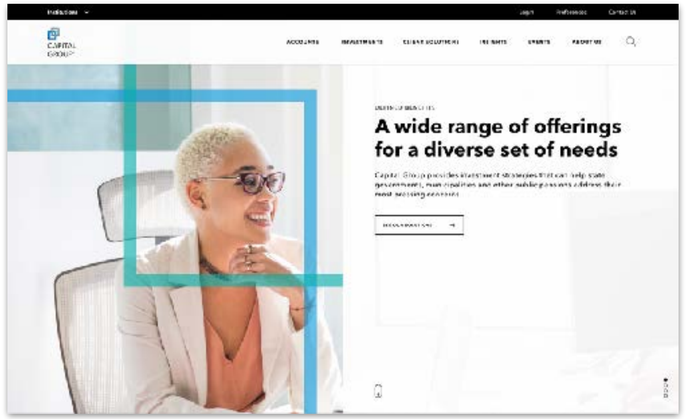


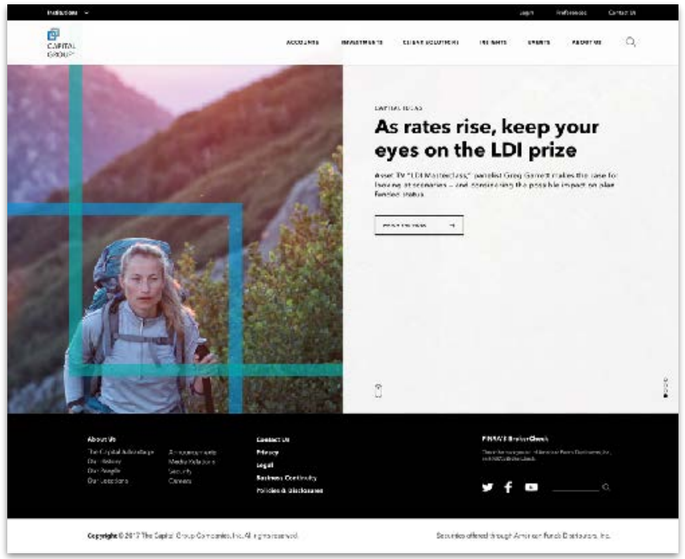
Topics:
1.Philosophy
2.Defined Contribution
3.Defined Benefits
4.Thought leadership
  1.LDI

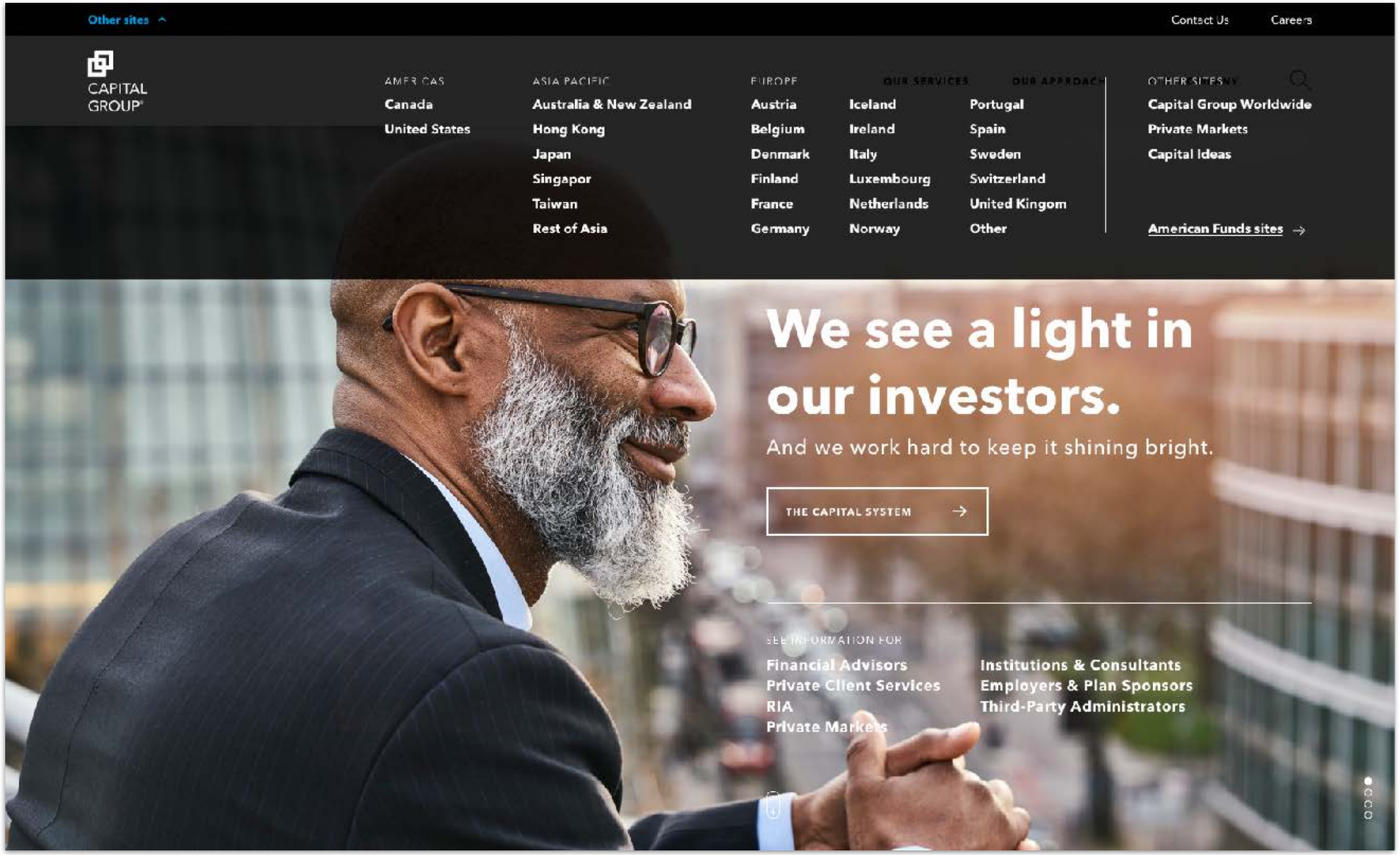
key
1.Net New
2.Re-design
3.Re-skin

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

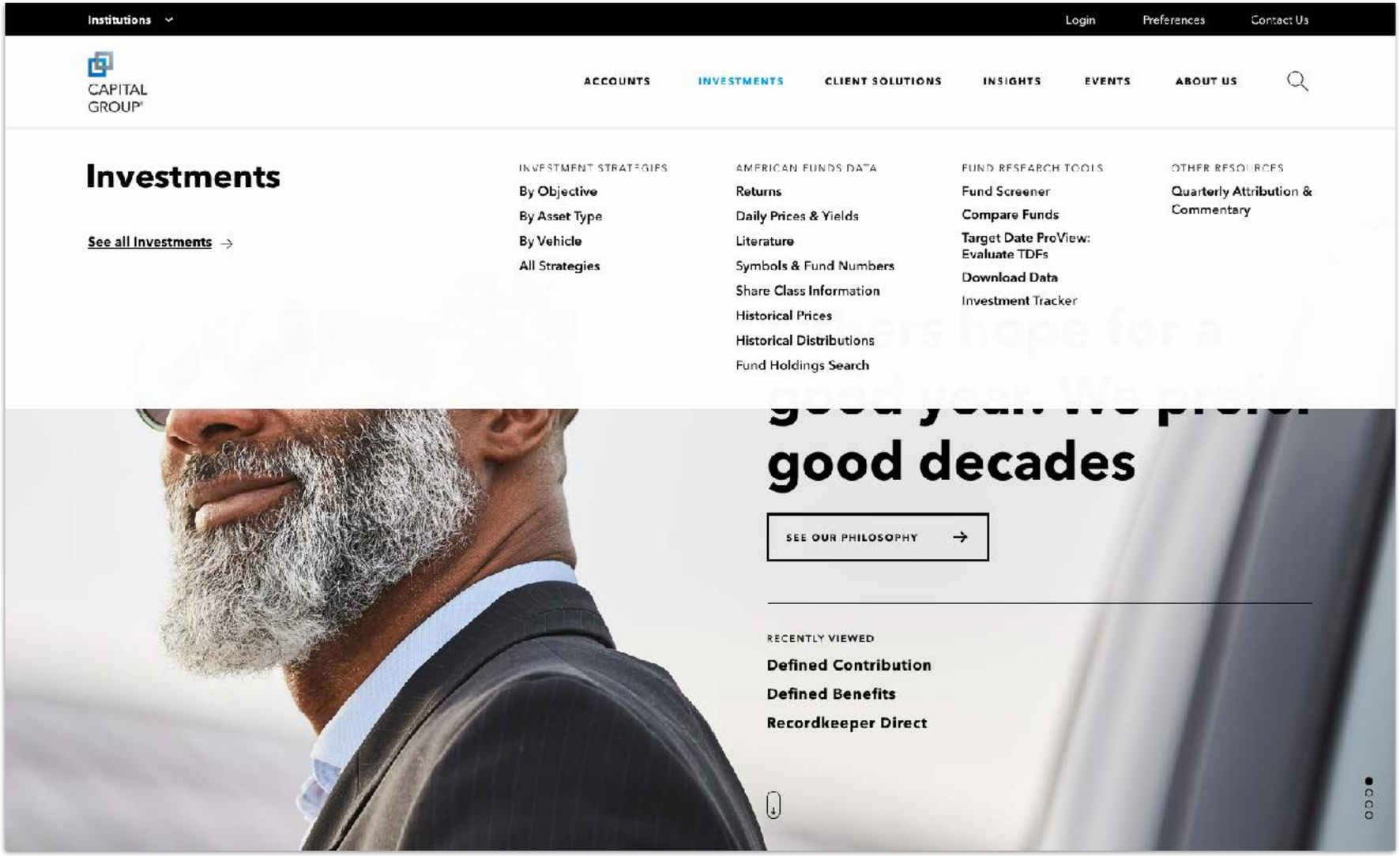


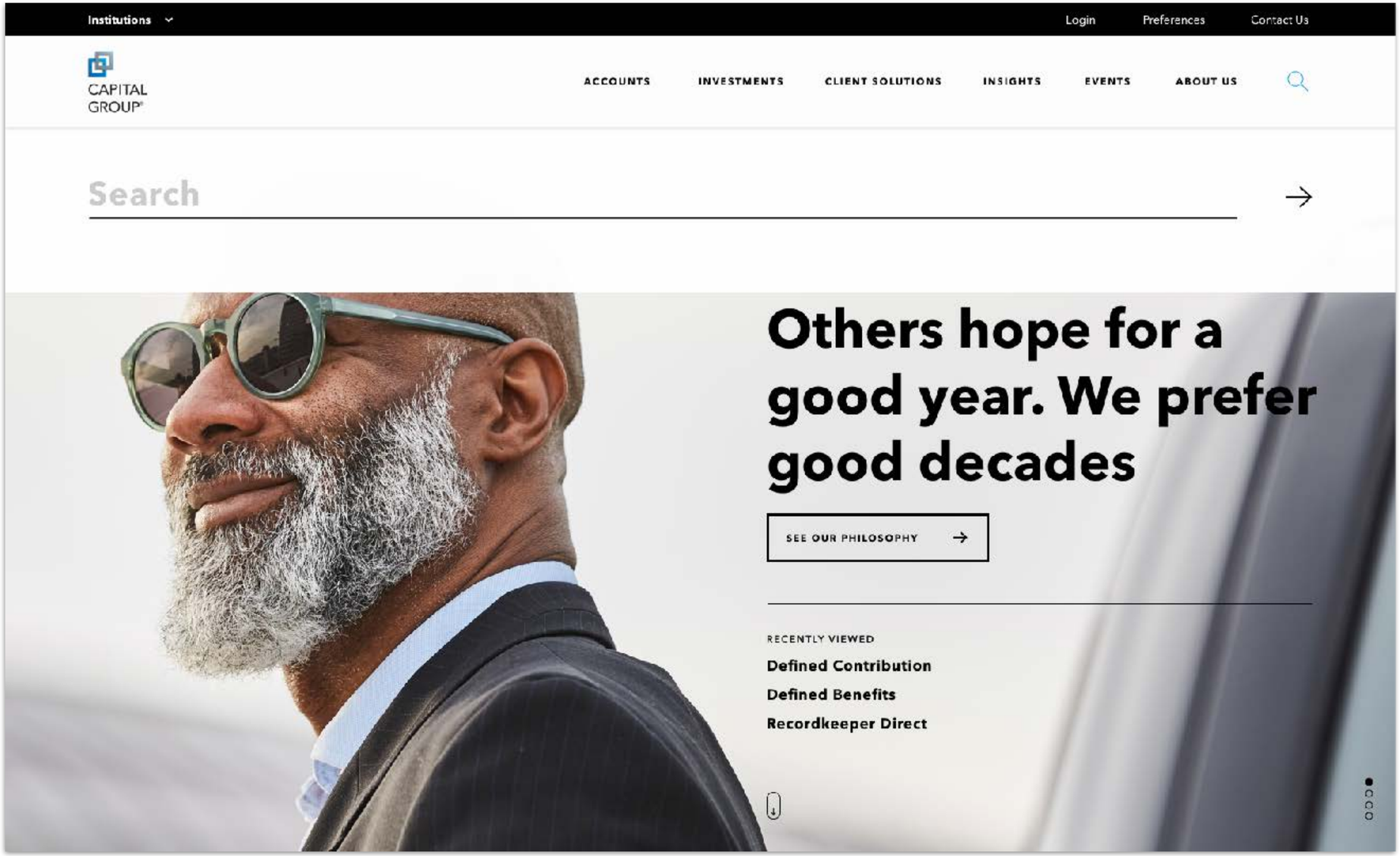




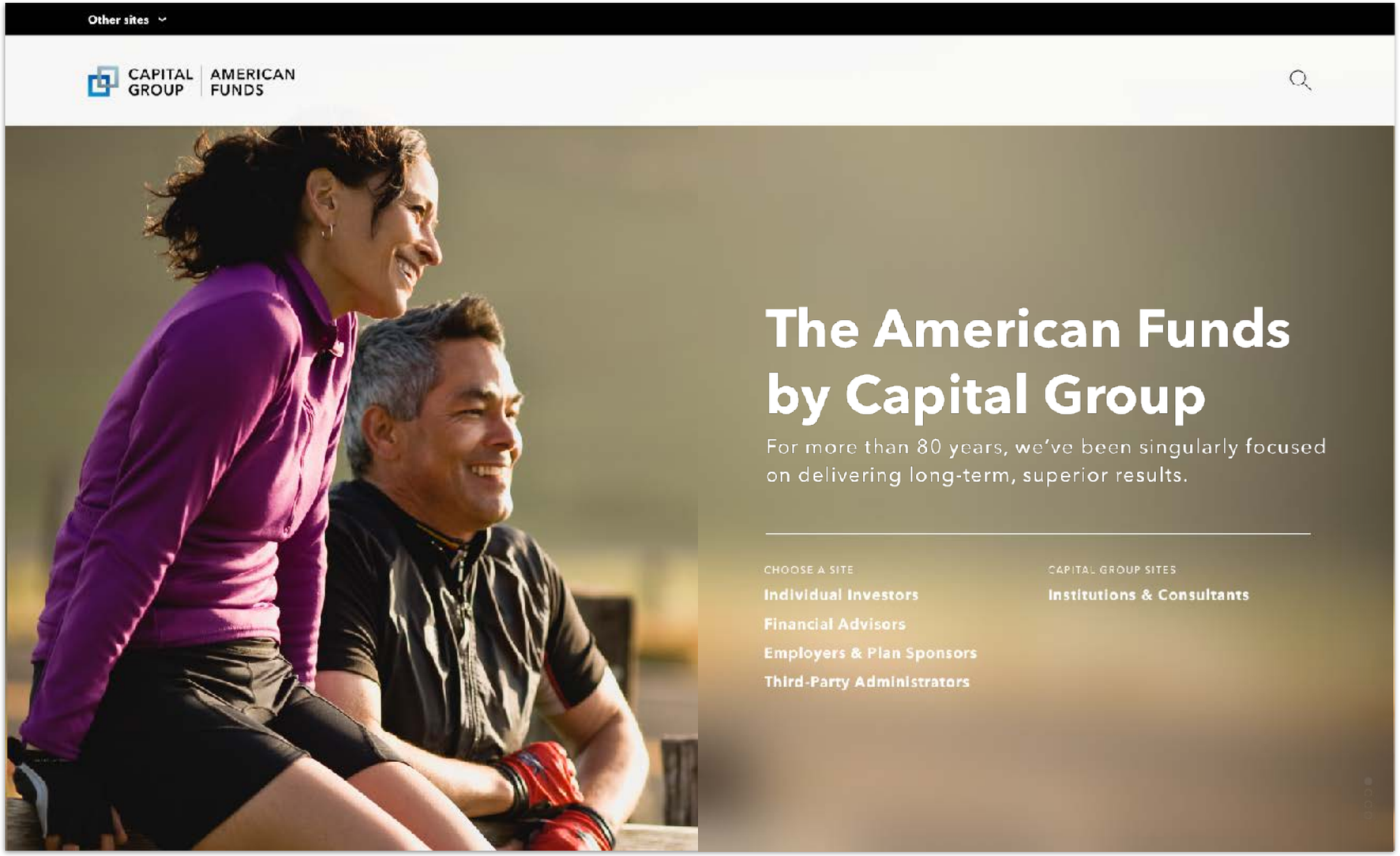

Other sites
Contact Us
Careers
CAPITAL GROUP
AMERICAS
Canada
United States
ASIA PACIFIC
Australia & New Zealand
Hong Kong
Japan
Singapor
Taiwan
Rest of Asia
EUROPE
Austria
Belgium
Denmark
Finland
France
Germany
Iceland
Ireland
Italy
Luxembourg
Netherlands
Norway
Portugal
Spain
Sweden
Switzerland
United Kingom
Other
OUR SERVICES
OUR APPROACH
OTHER SITES
Capital Group Worldwide
Private Markets
Capital Ideas
American Funds sites
We see a light in our investors.
And we work hard to keep it shining bright.
THE CAPITAL SYSTEM
SEE INFORMATION FOR
Financial Advisors
Private Client Services
RIA
Private Markets
Institutions & Consultants
Employers & Plan Sponsors
Third-Party Administrators

Homepage | Sub navigation

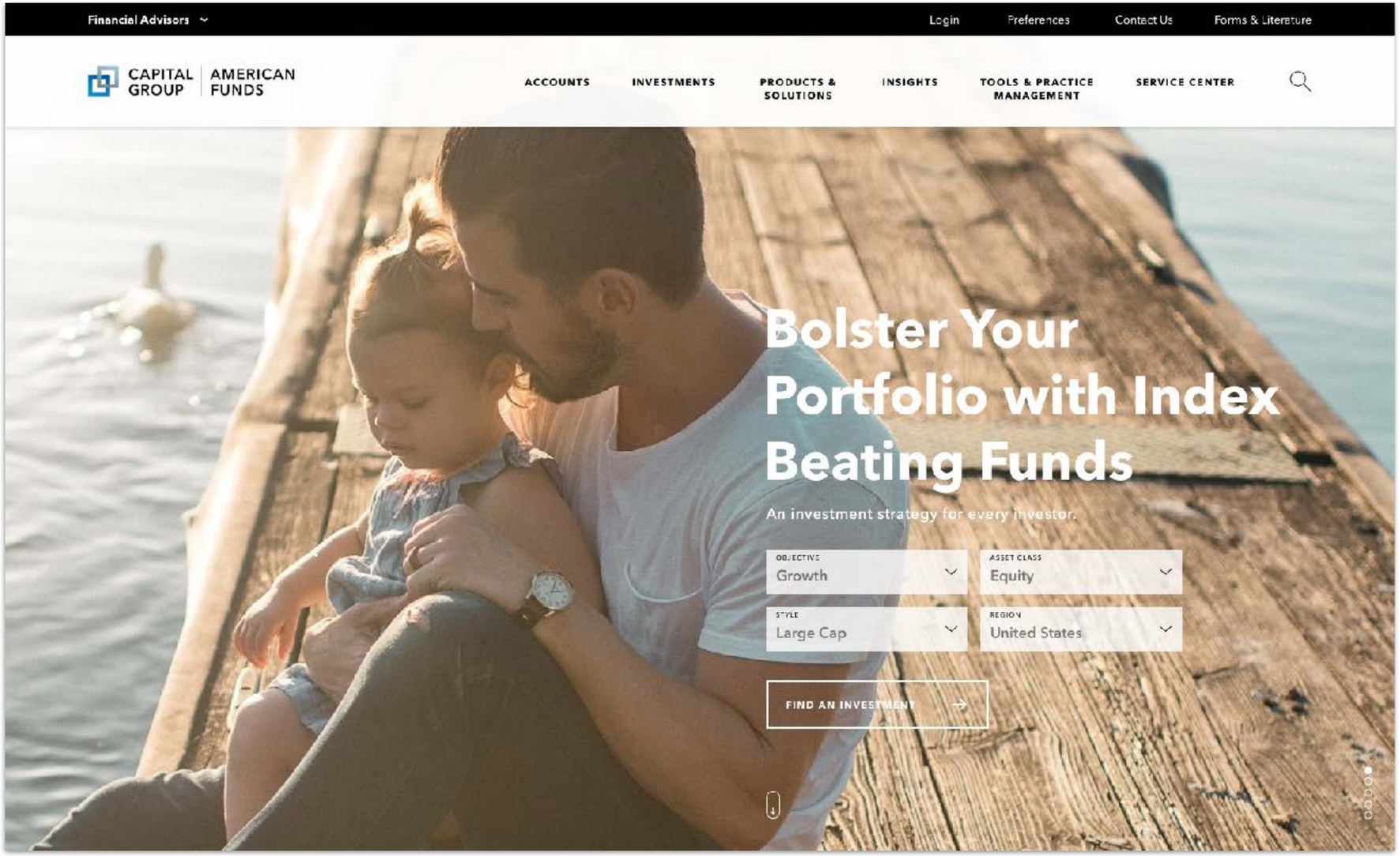



Institutions
Login
Preferences
Contact Us
CAPITAL GROUP
ACCOUNTS
INVESTMENTS
CLIENT SOLUTIONS
INSIGHTS
EVENTS
ABOUT US
Search
Others hope for a good year. We prefer good decades
SEE OUR PHILOSOPHY
RECENTLY VIEWED
Defined Contribution
Defined Benefits
Recordkeeper Direct

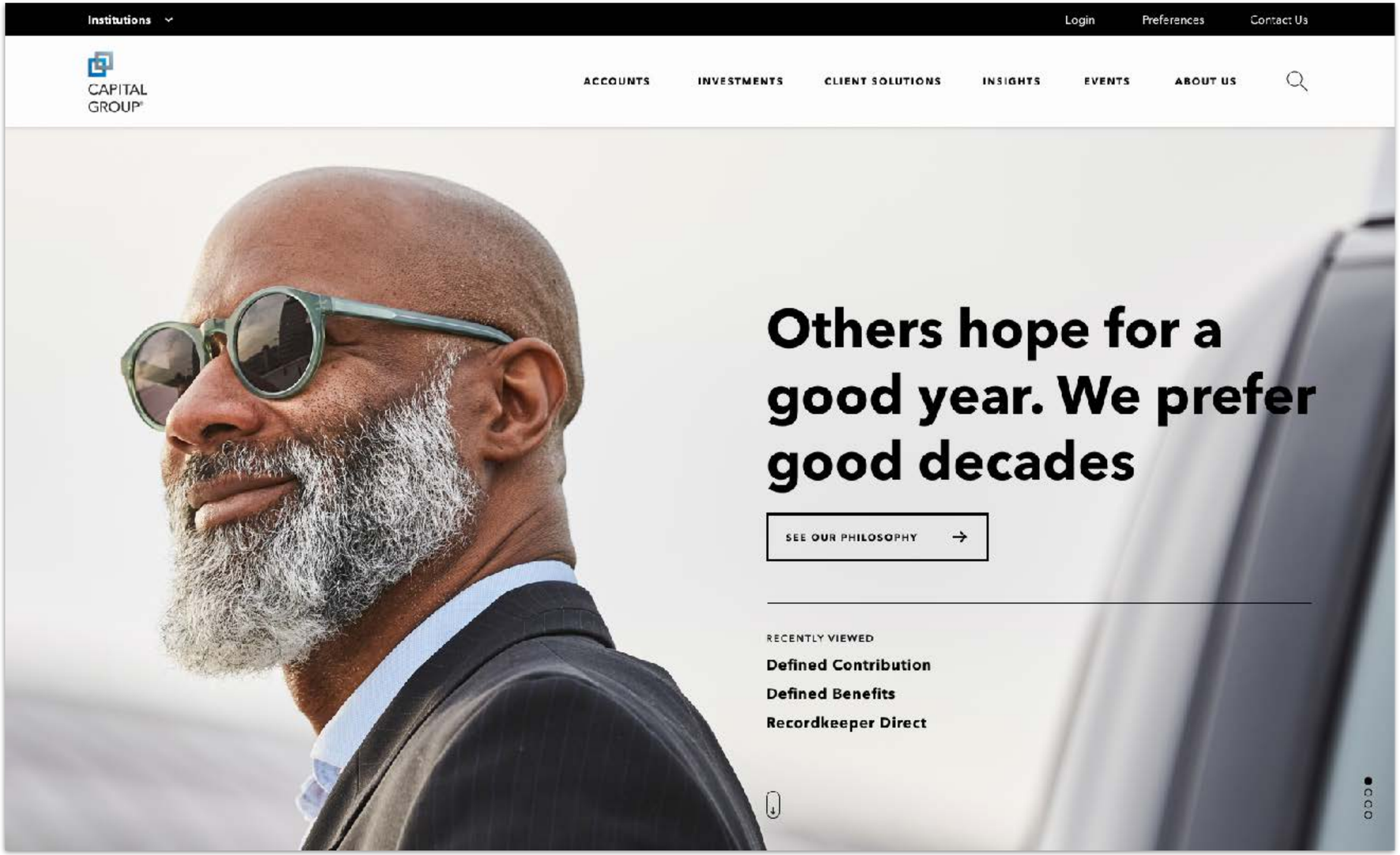
Homepage | ADA Compliance



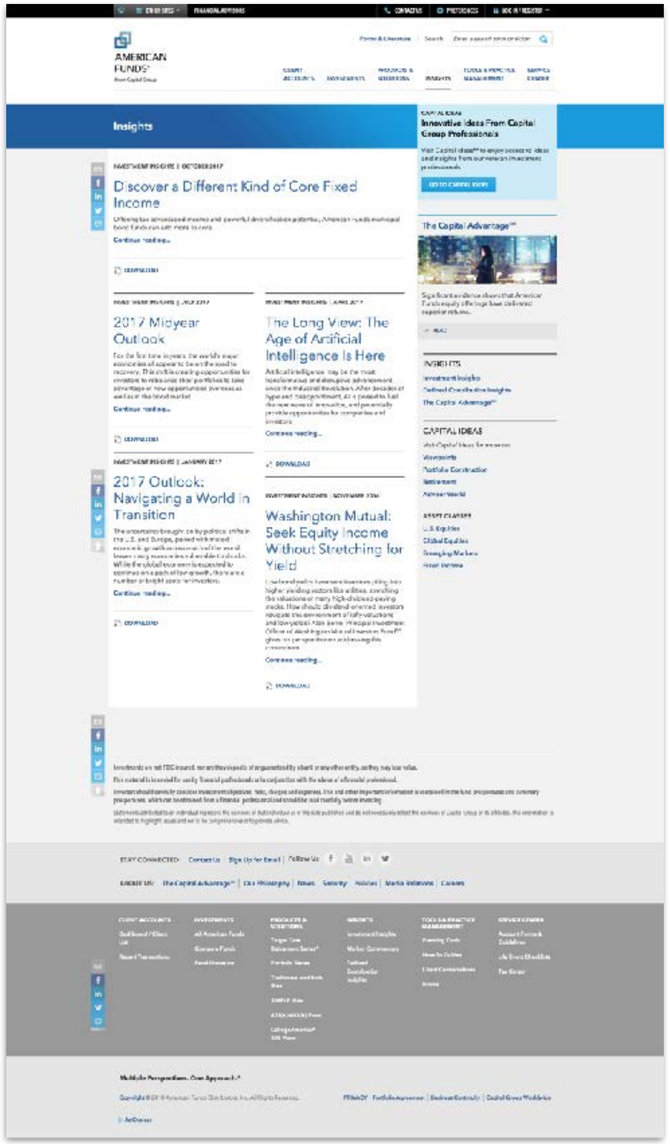
Homepage | ADA Compliance



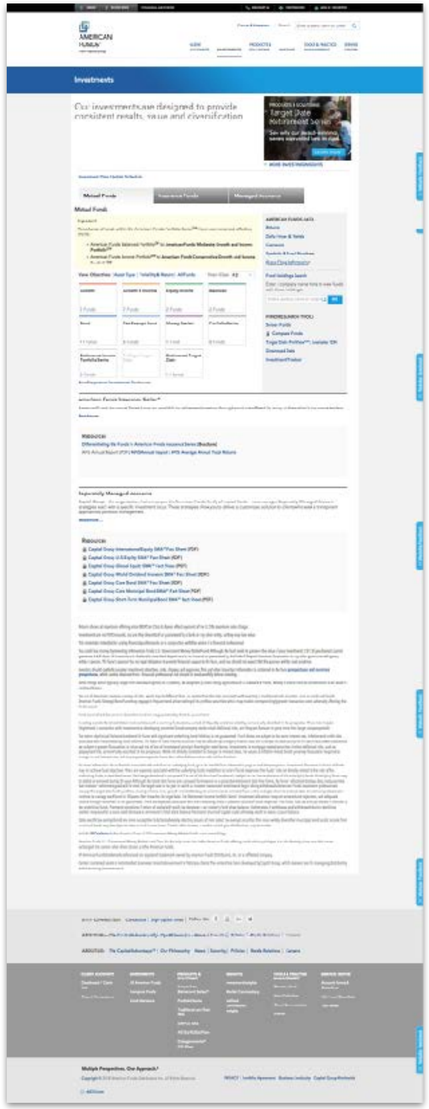
Homepage | ADA Compliance

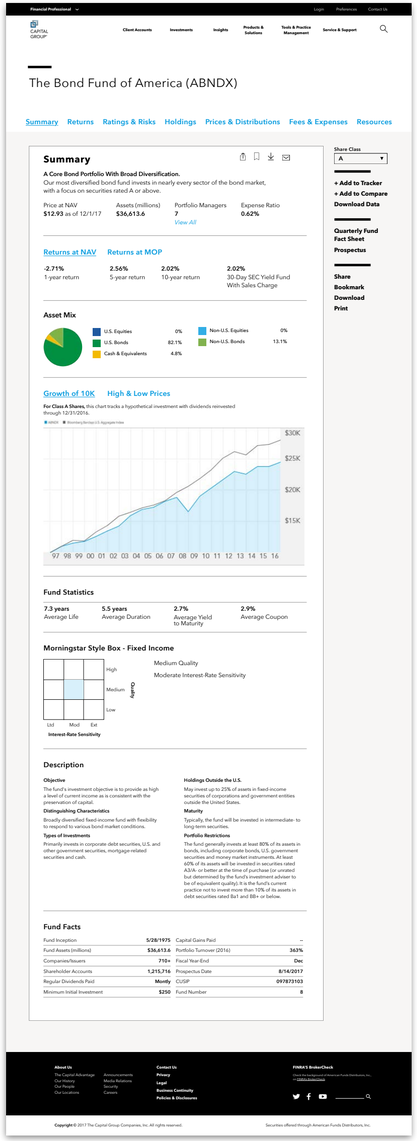


Secondary pages | Insights Landing

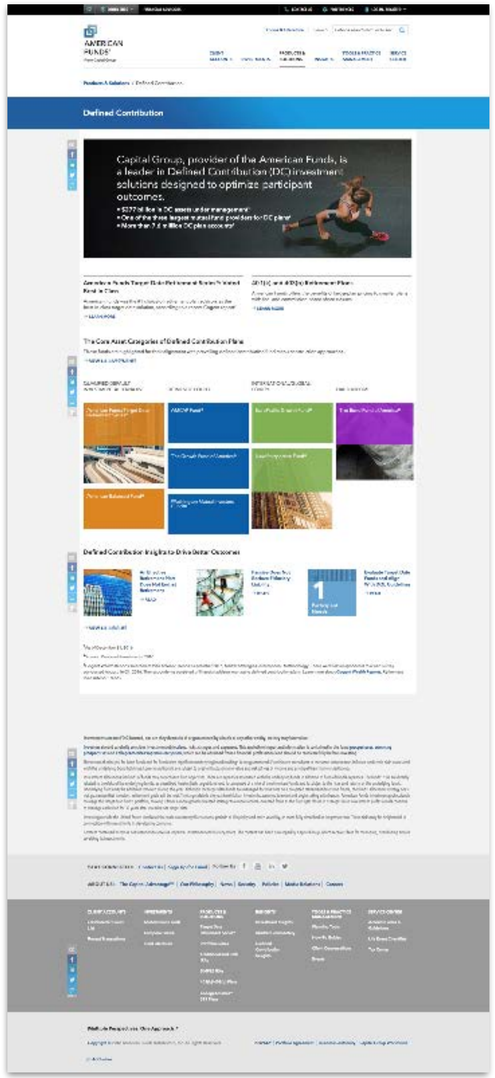


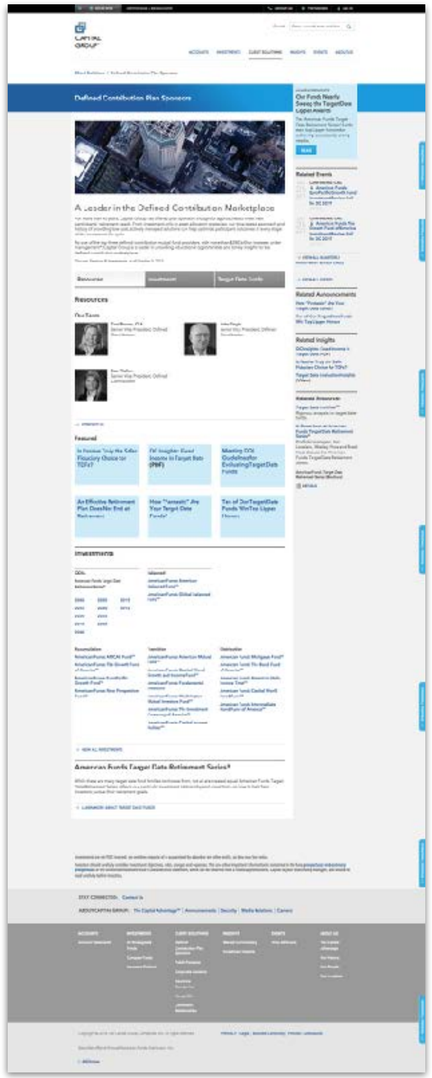
Secondary pages | Investment Landing & Detail

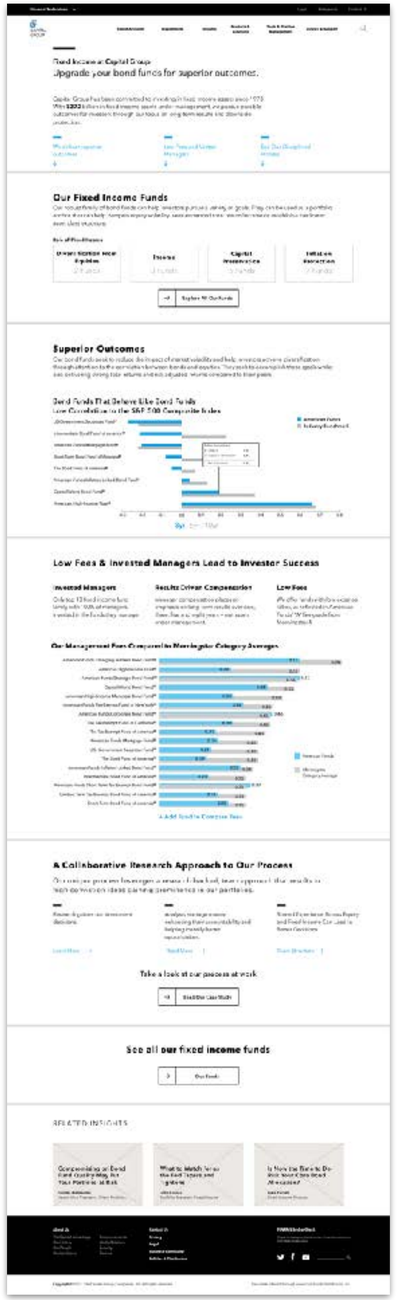




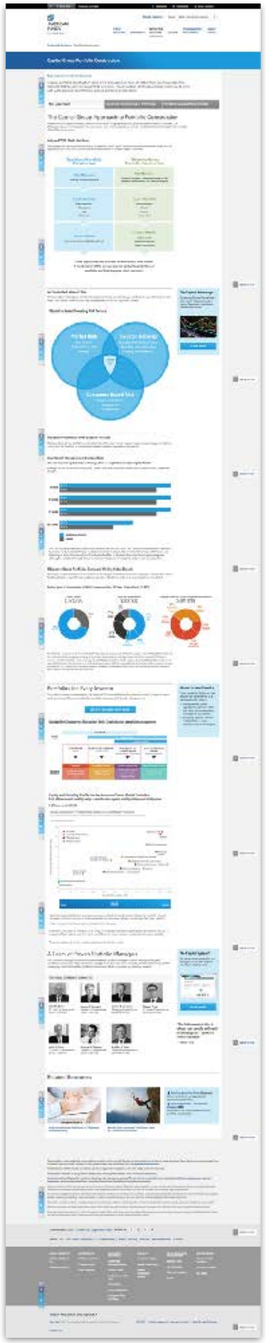
Secondary pages | Defined Contribution

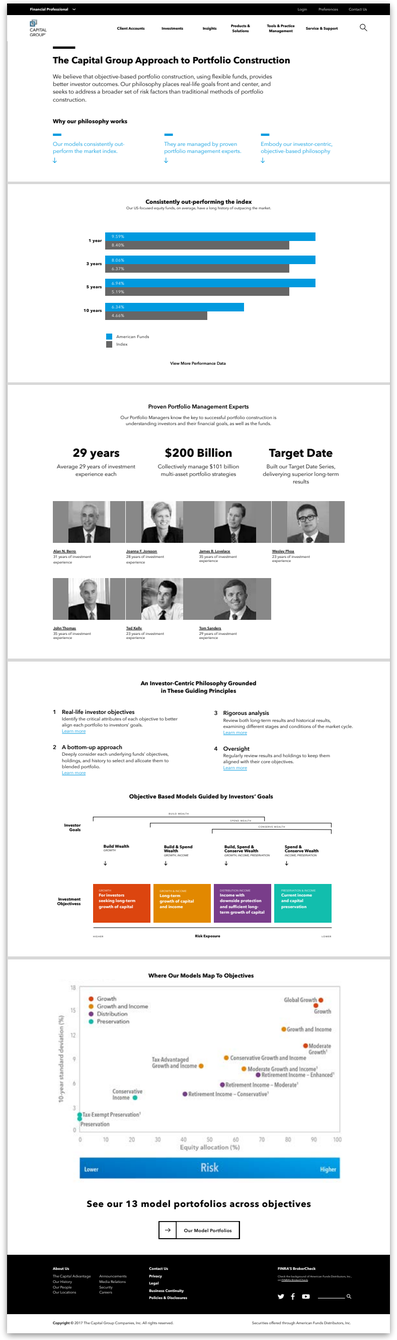





Our Fixed Income Funds
Superior Outcomes
Low Fees & Invested Managers Lead to Investor Success
A Collaborative Research Approach to Our Process
See all our fixed income funds

Secondary pages | Portfolio Construction





DRAFT

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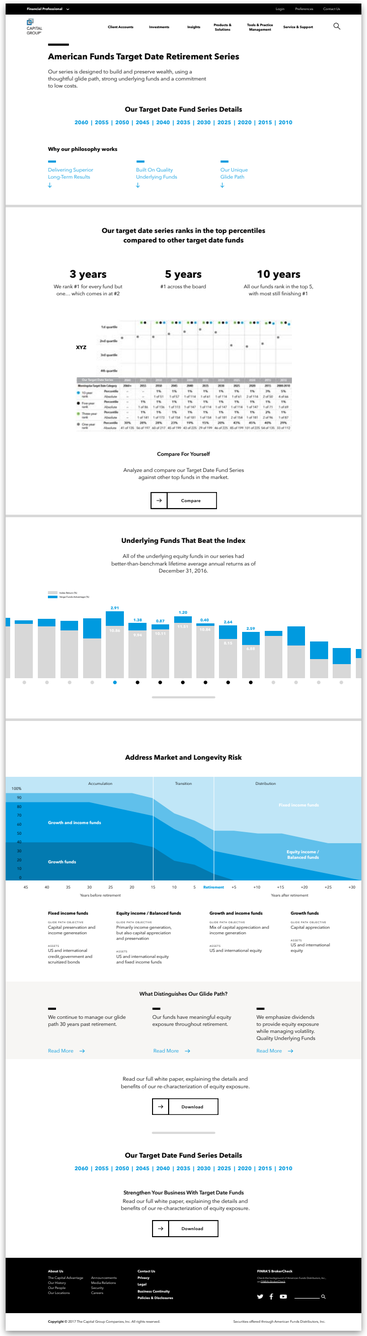
Secondary pages | TDF Theme page



DRAFT

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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

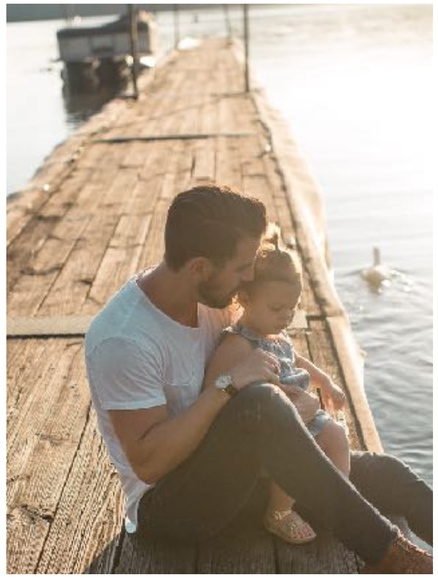
Bright

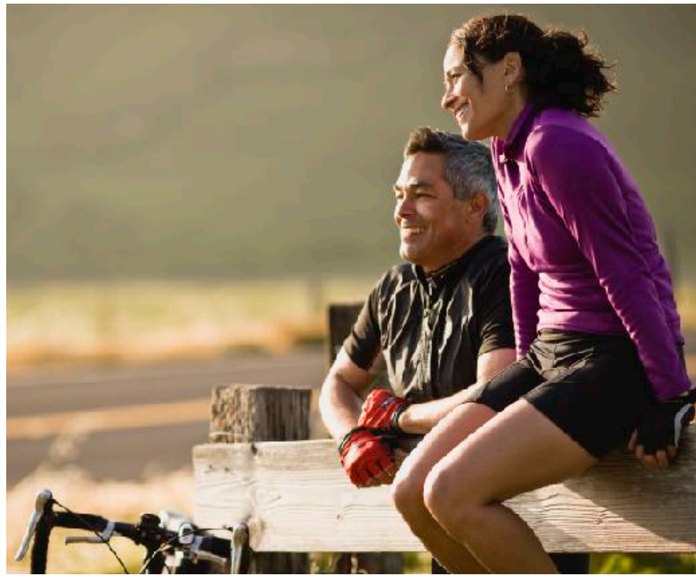
Highlighting:

Content

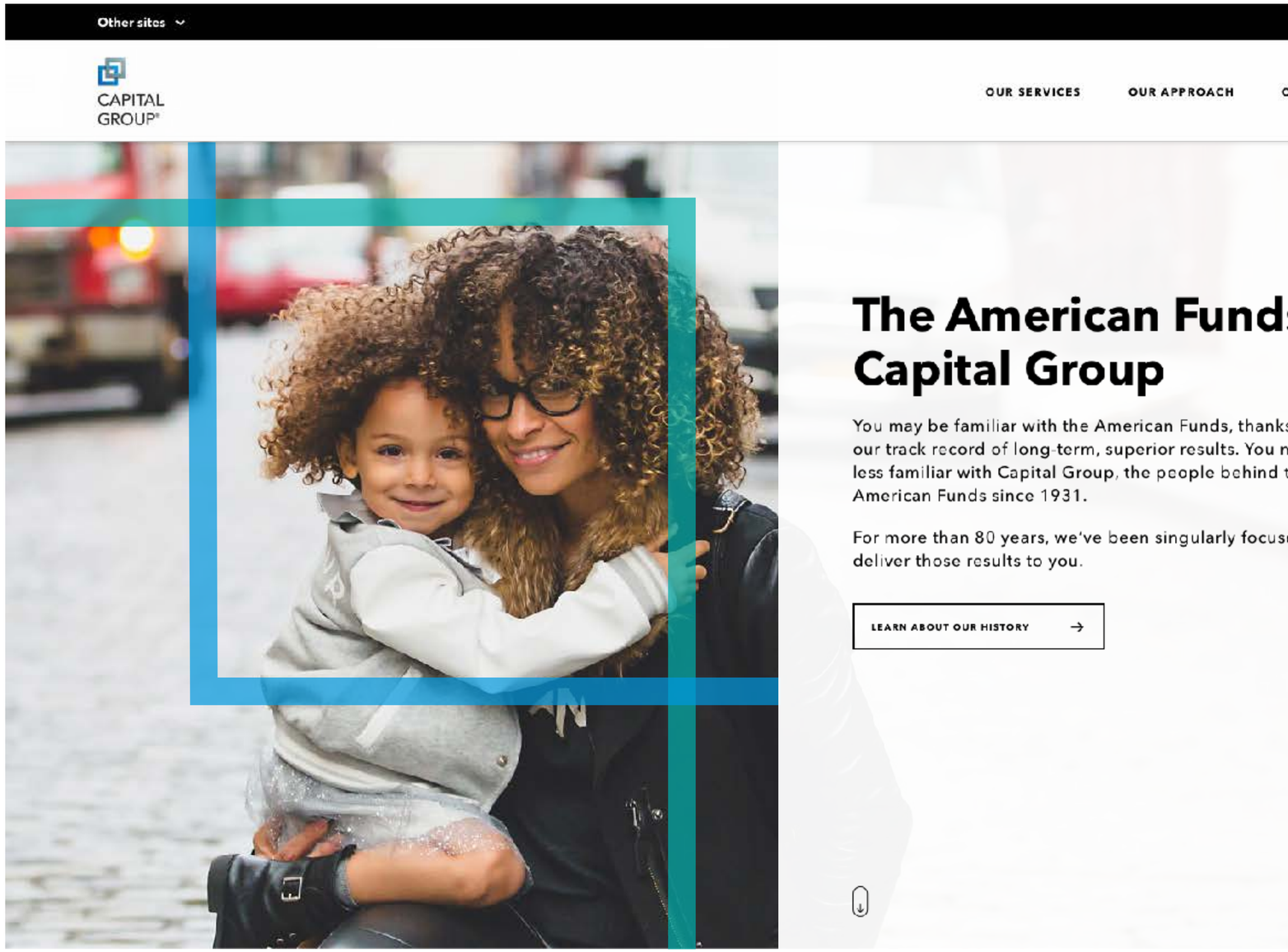
Distinct focal points

Life stages



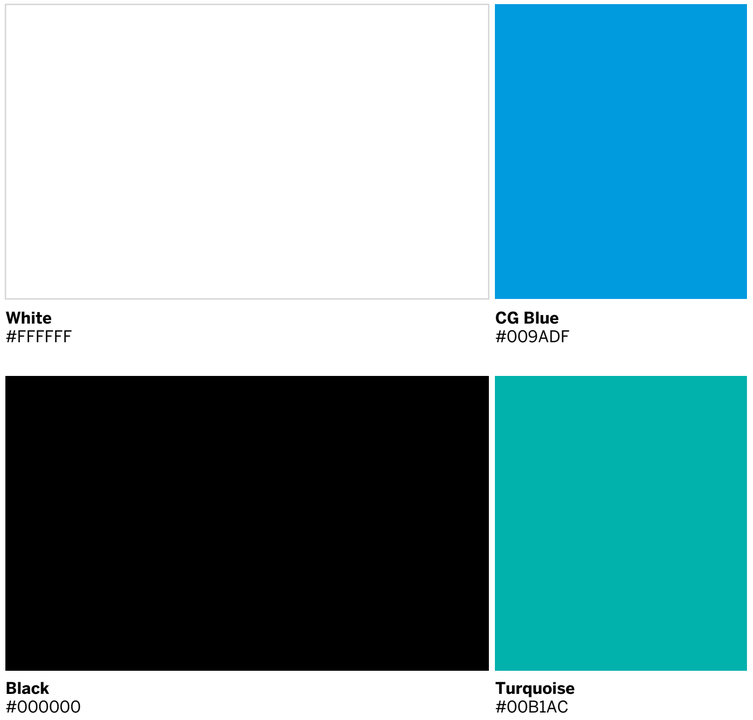


The Dynamic Aperture acts as a connection between text and image.



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:

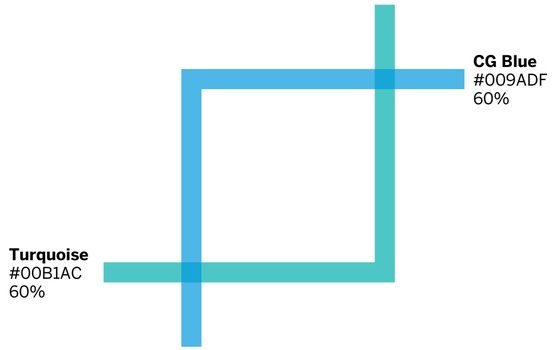
1. SEE OUR PHILOSOPHY →

2. **4 Charts That Explain the Importance of Global Flexibility in Equity Portfolios**
   Sunder Ramkumar & Michelle J. Black | NOVEMBER 8, 2017 →

3. **Our perspectives** →

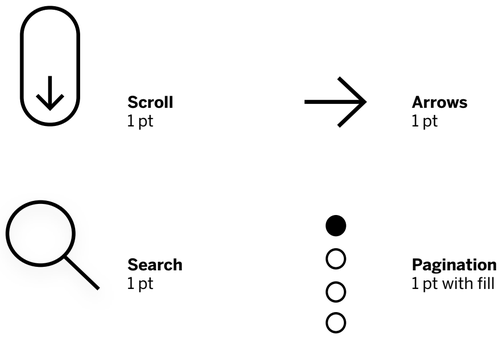
Simple black and white with arrow and/or drop shadow (20%, 0x, 2y, 4 blur, 0 spread)

Aperture:

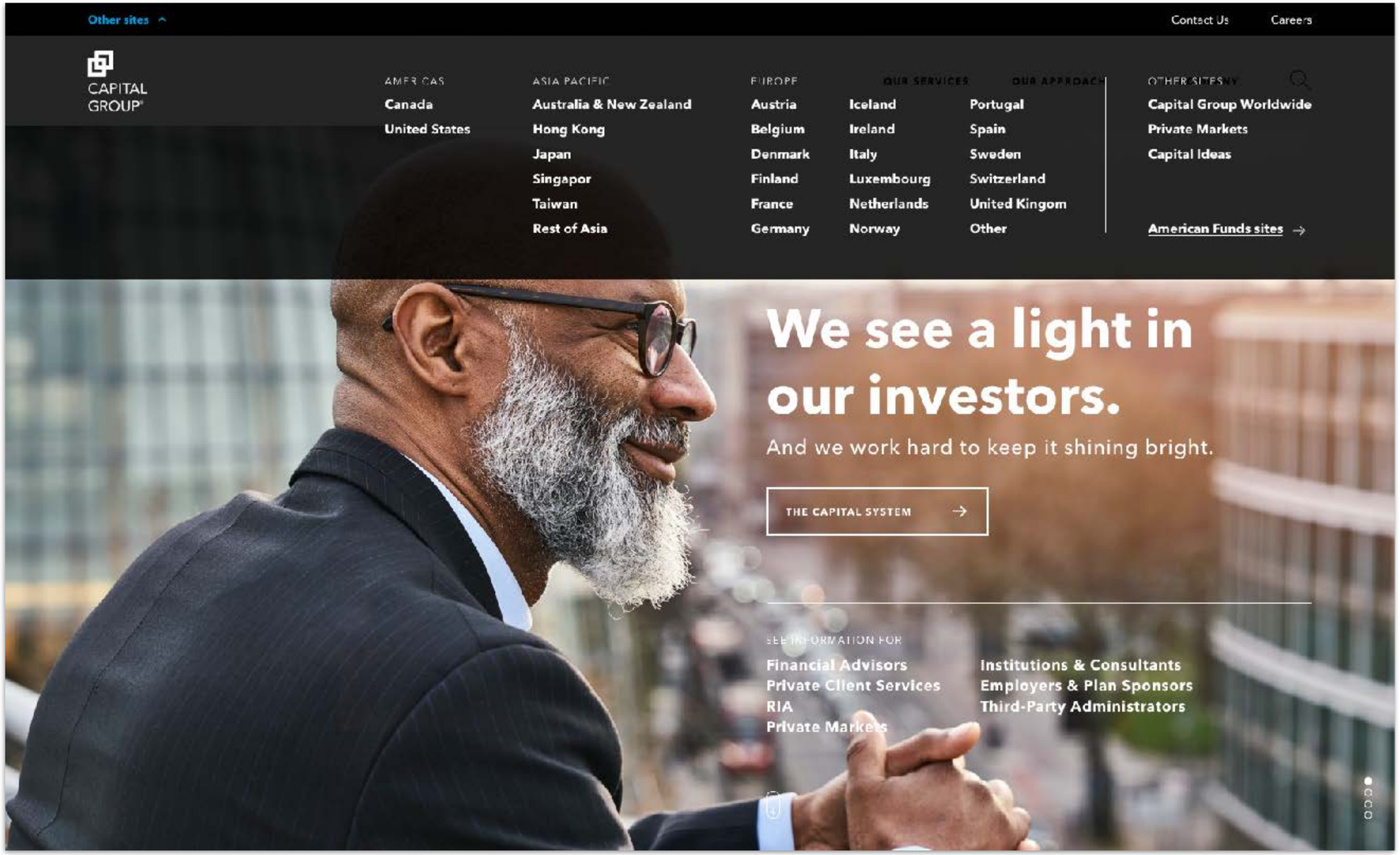


Desktop: **8x** Tablet: **8x** Mobile: **5x**

Icons:



1 pt lines, blunt ends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Taiwan
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Finland
France
Germany
Iceland
Ireland
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Luxembourg
Netherlands
Norway
Portugal
Spain
Sweden
Switzerland
United Kingom
Other
OUR SERVICES
OUR APPROACH
OTHER SITES
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Private Markets
Capital Ideas
American Funds sites
We see a light in our investors.
And we work hard to keep it shining bright.
THE CAPITAL SYSTEM
SEE INFORMATION FOR
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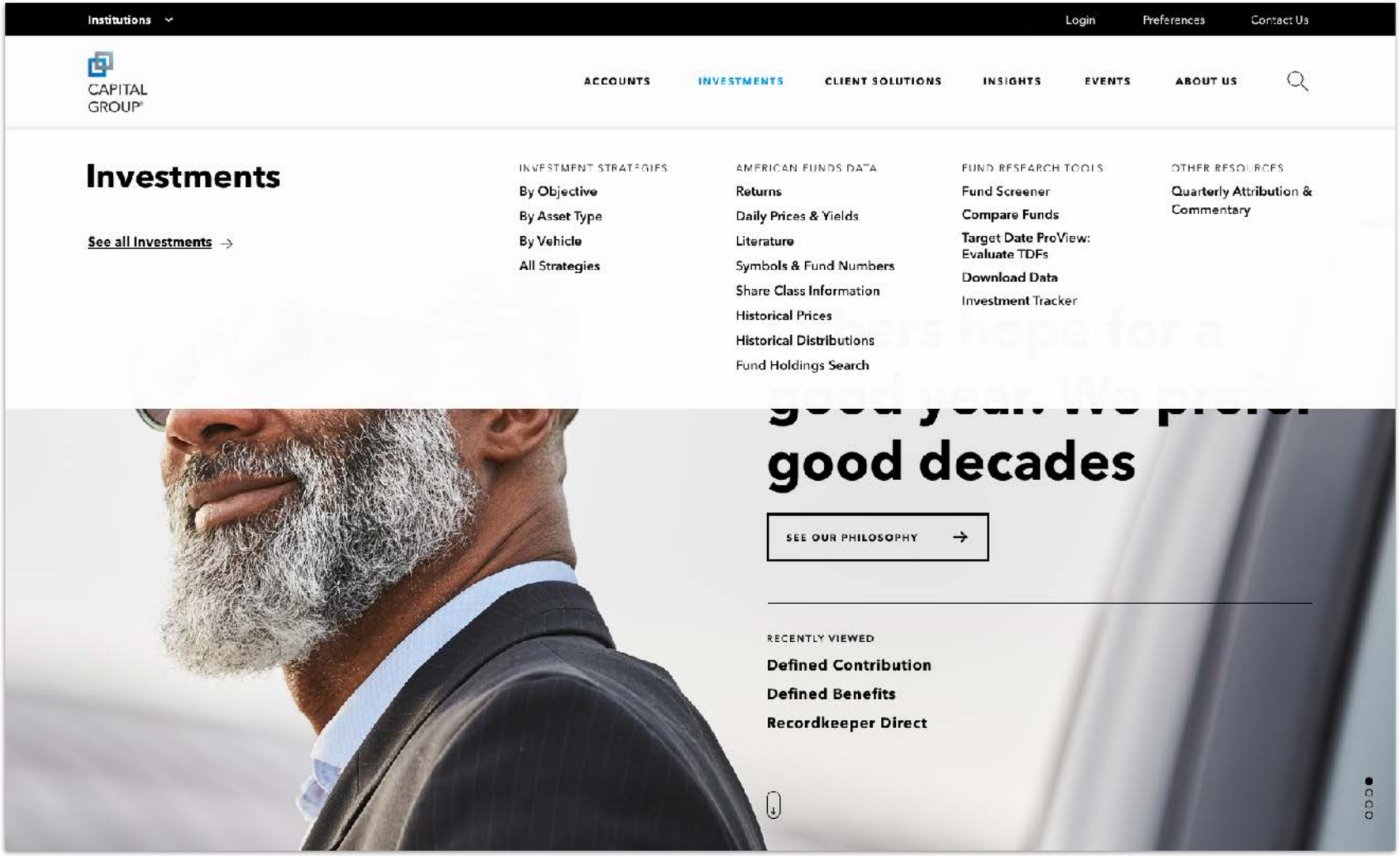
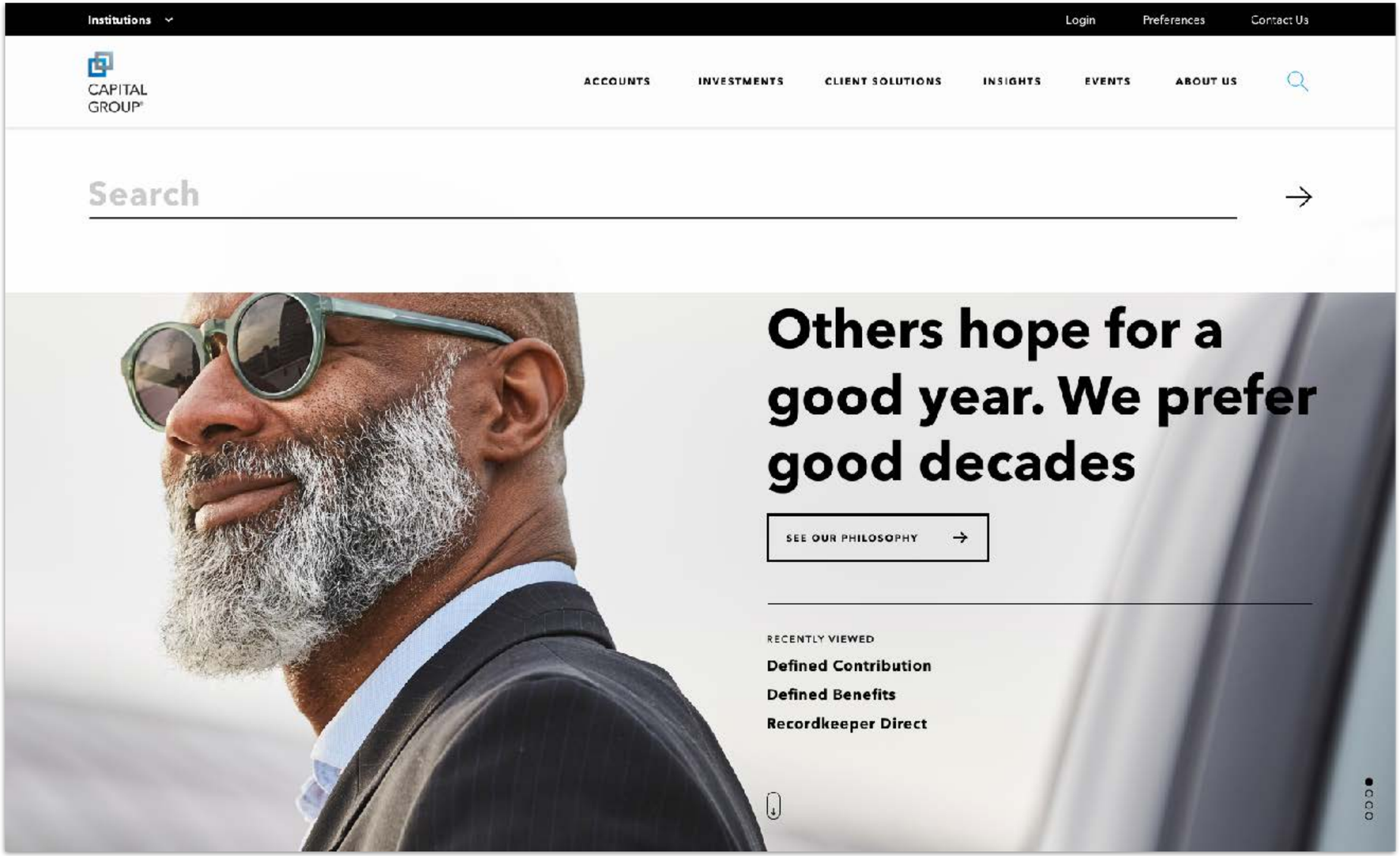
Private Client Services
RIA
Private Markets
Institutions & Consultants
Employers & Plan Sponsors
Third-Party Administrators

Homepage | Sub navigation

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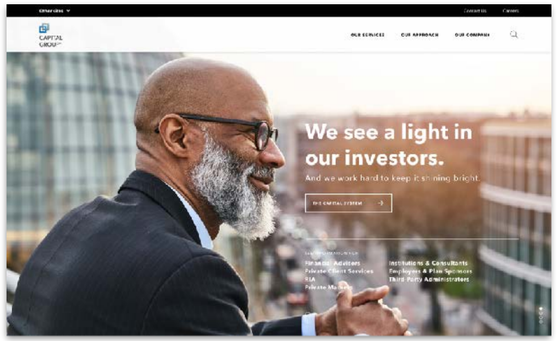
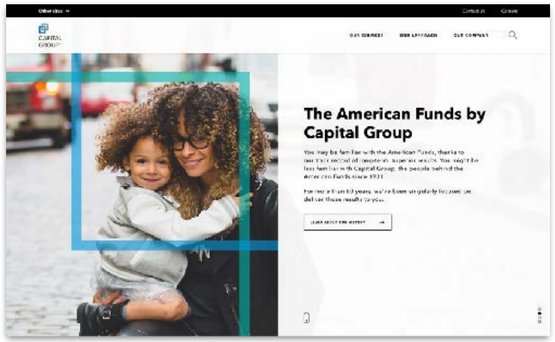
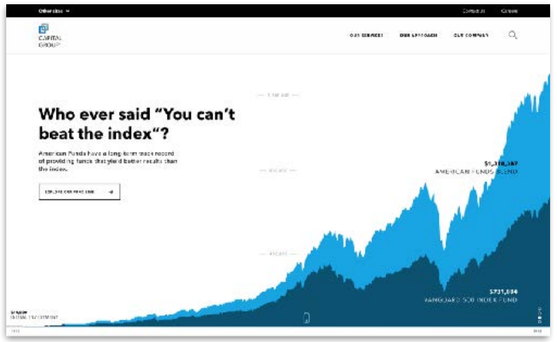
Others hope for a good year. We prefer good decades
SEE OUR PHILOSOPHY
RECENTLY VIEWED
Defined Contribution
Defined Benefits
Recordkeeper Direct

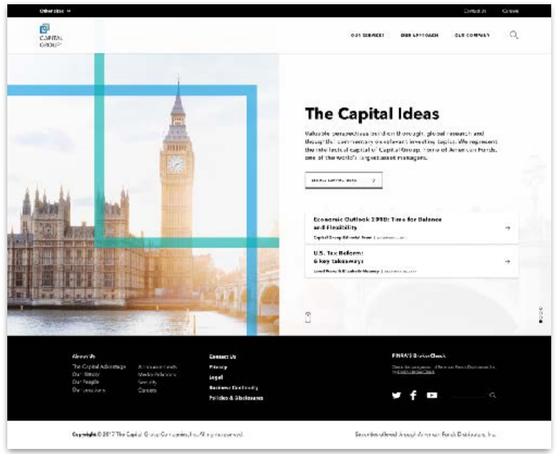
Homepage | CapitalGroup.com

DESKTOP









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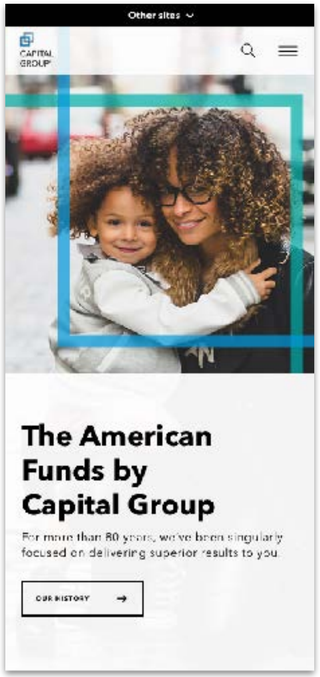
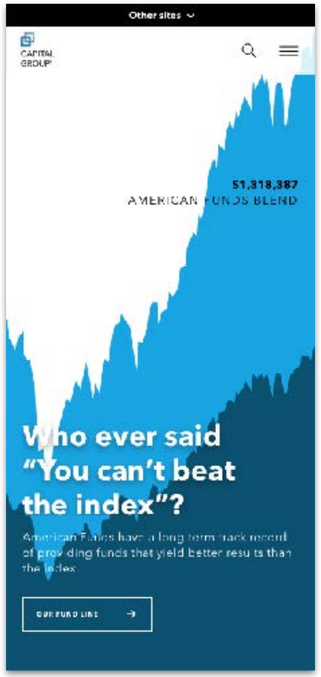
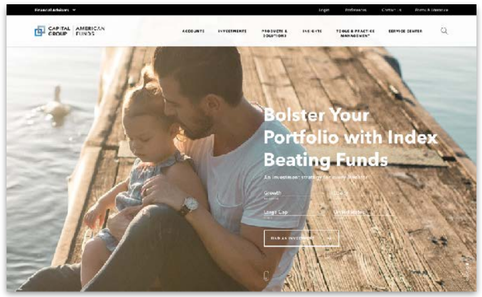
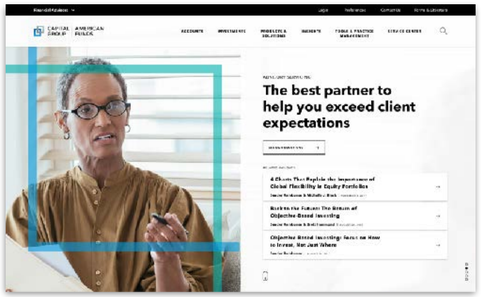


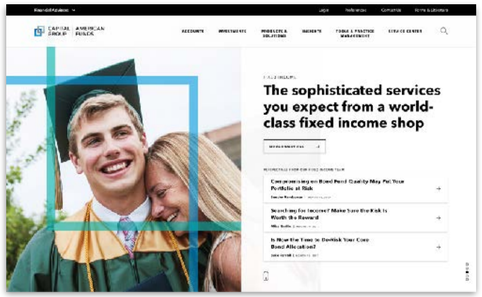


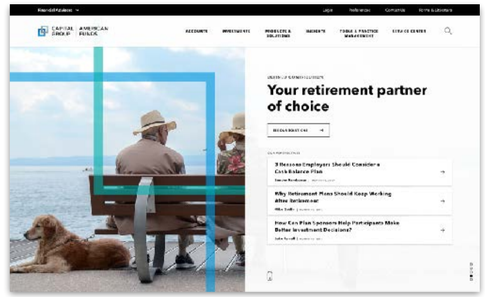
Homepage | Financial Advisors

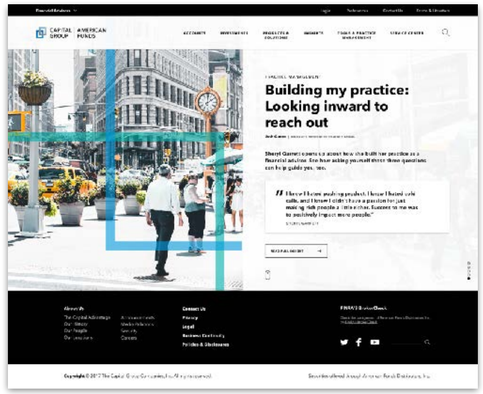
DESKTOP











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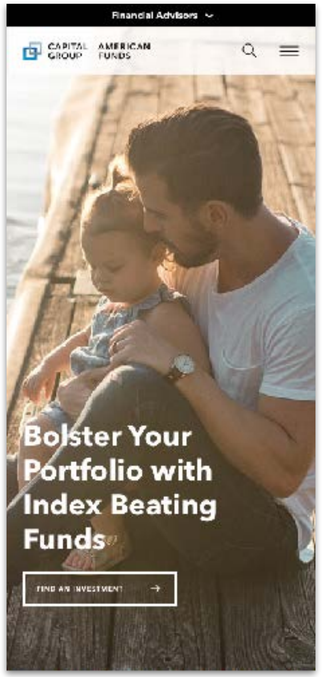
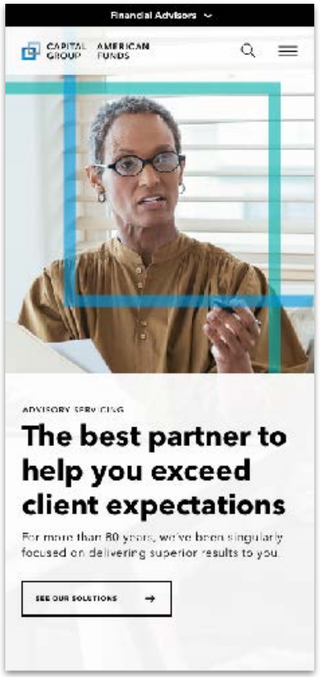
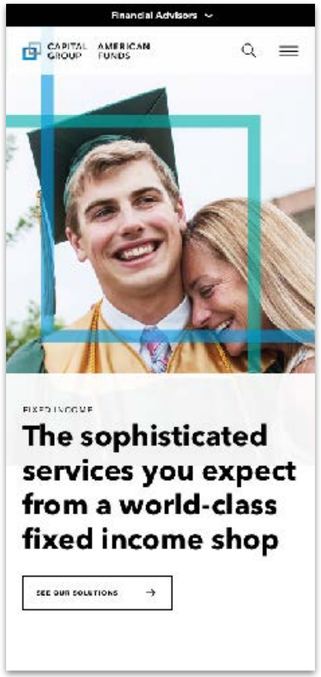
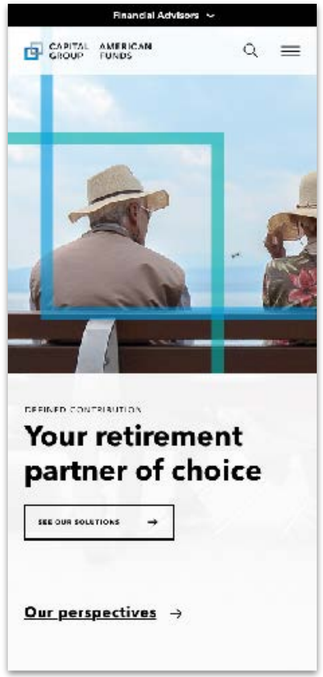


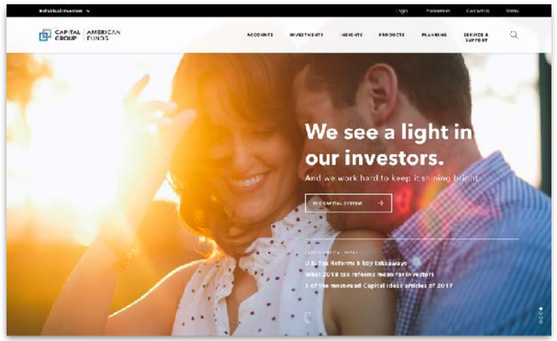


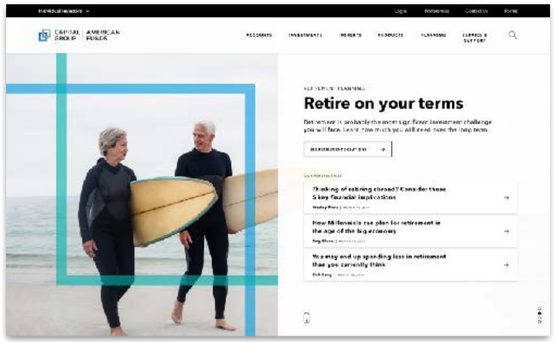


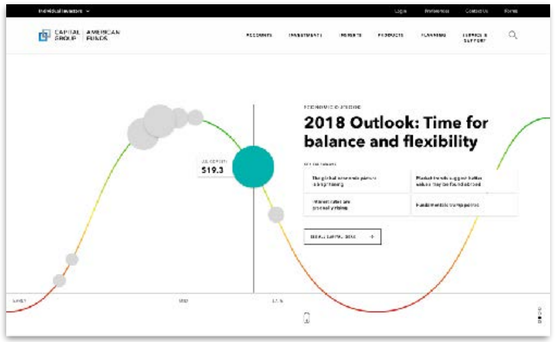


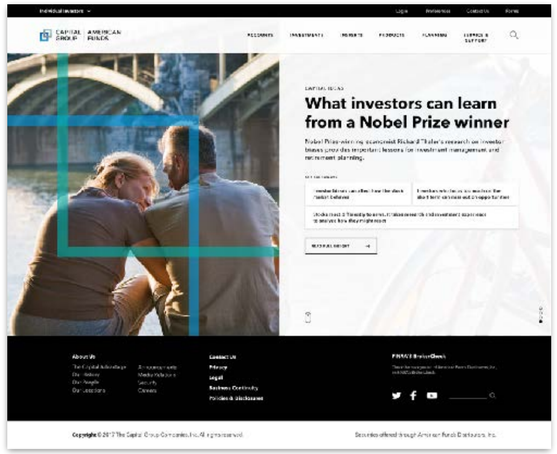
Homepage | Individual Investors

DESKTOP









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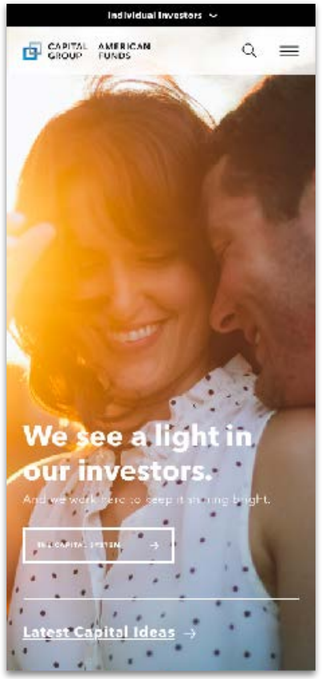
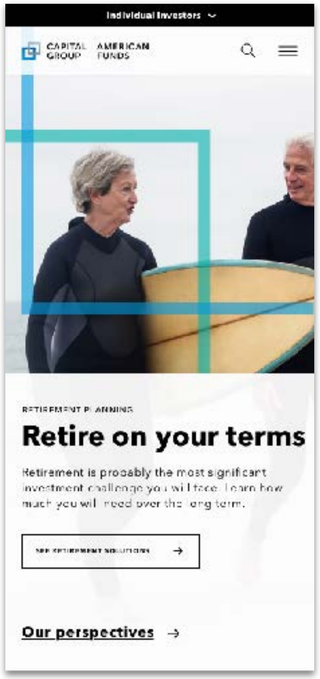
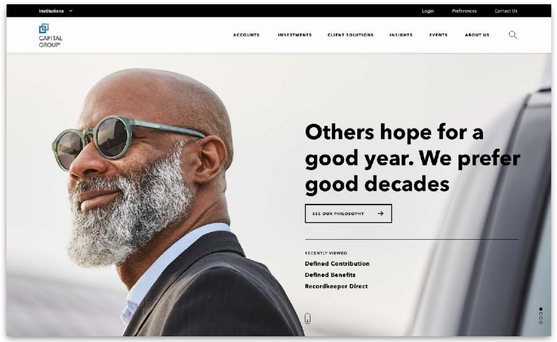
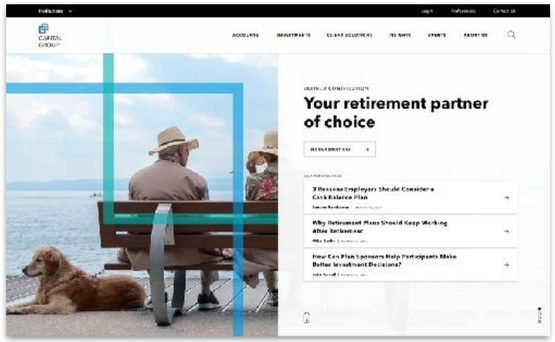


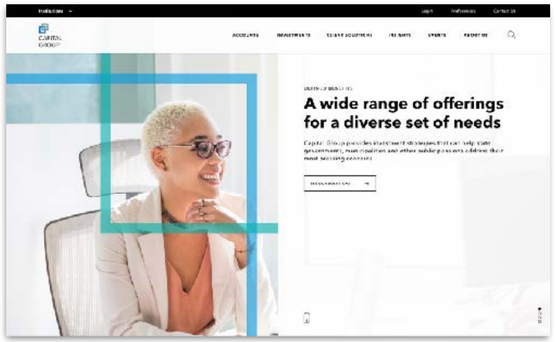


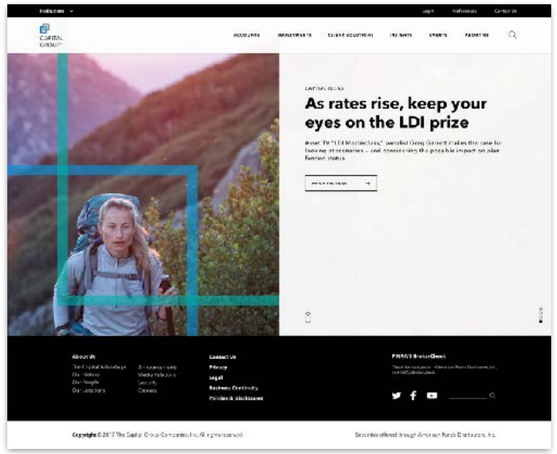
Homepage | Institutions

DESKTOP









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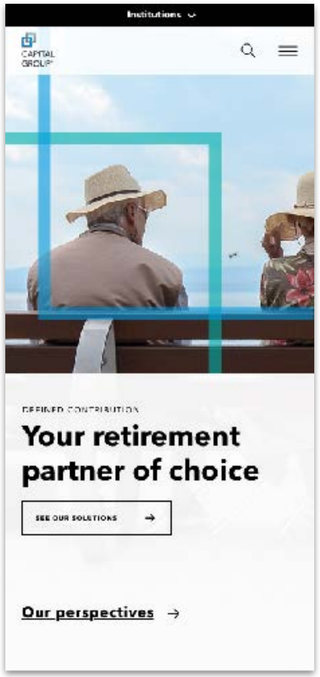
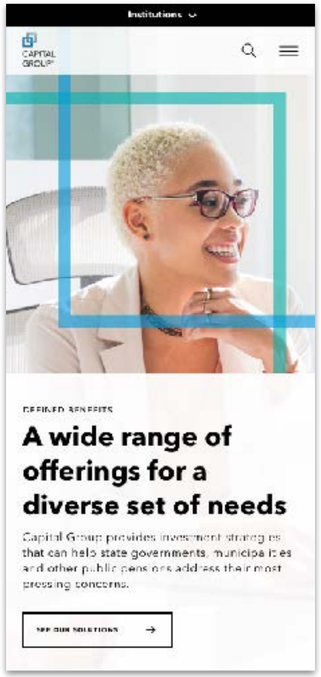
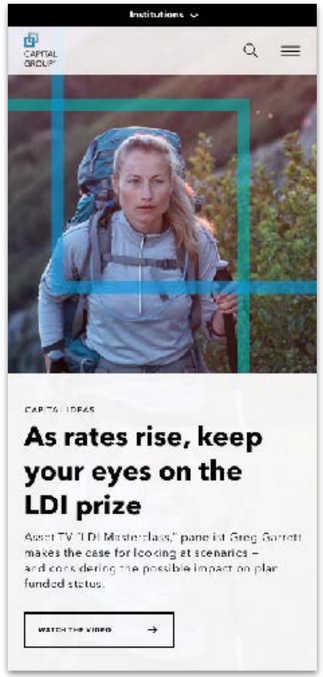
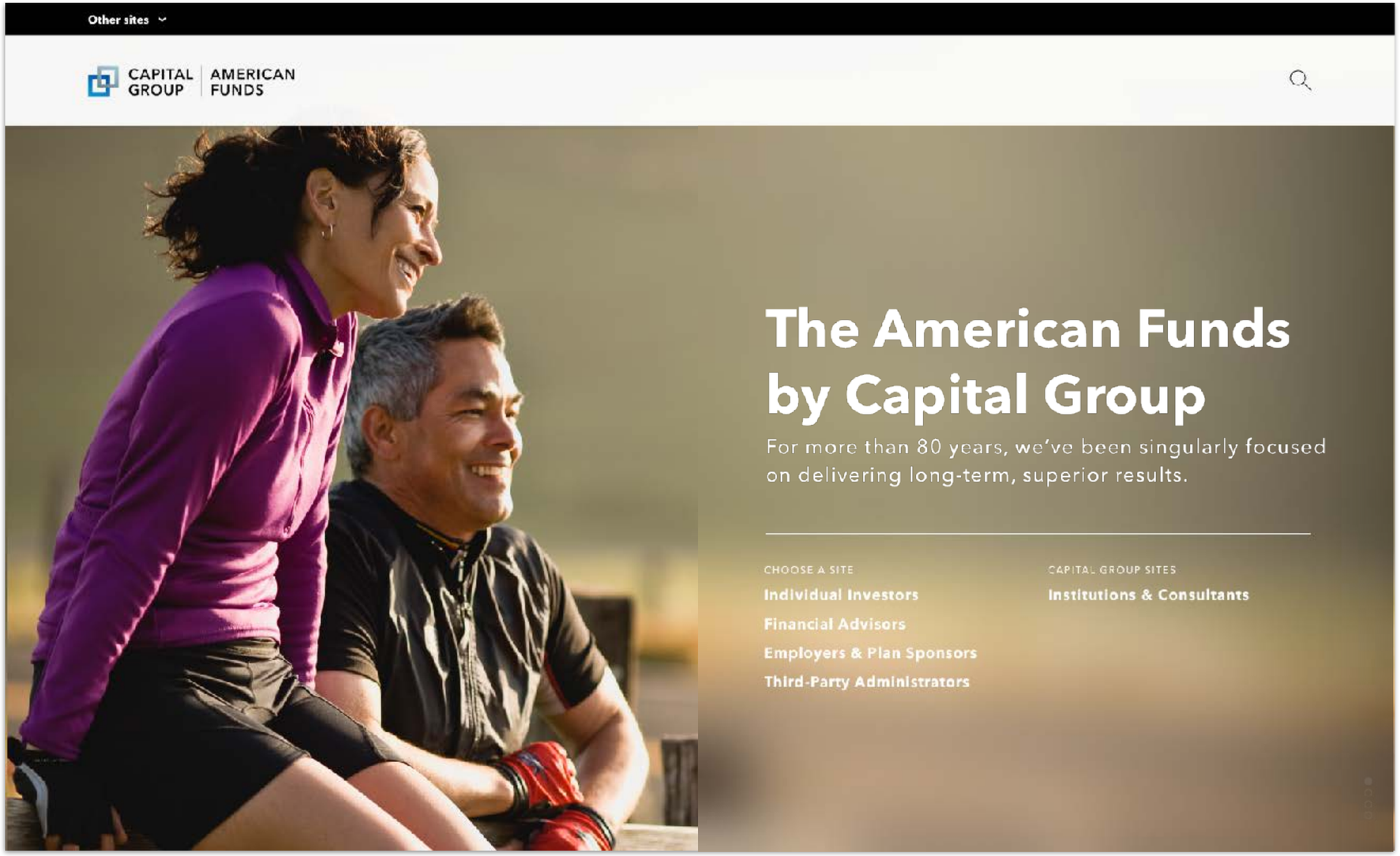






Homepage | ADA Compliance



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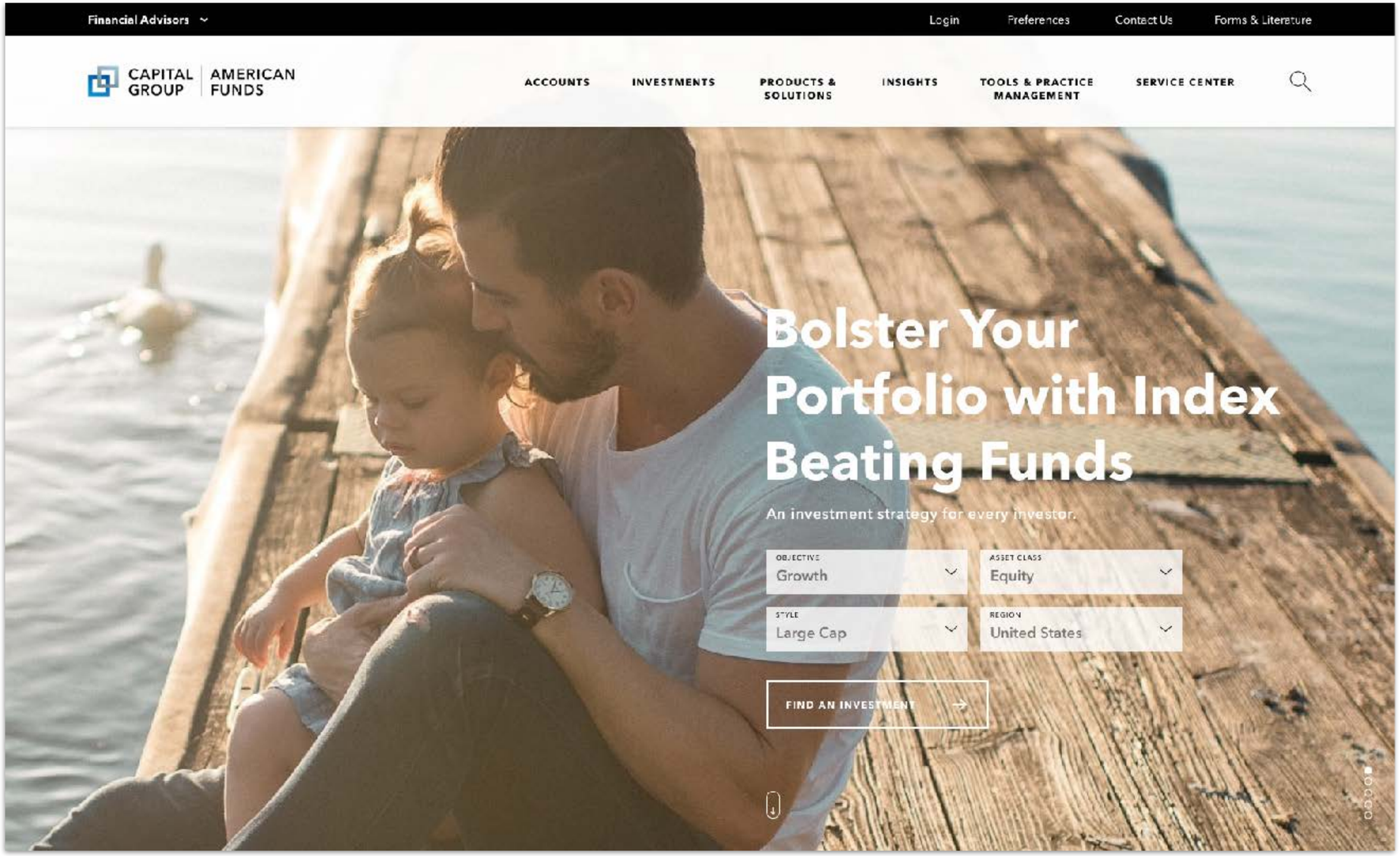
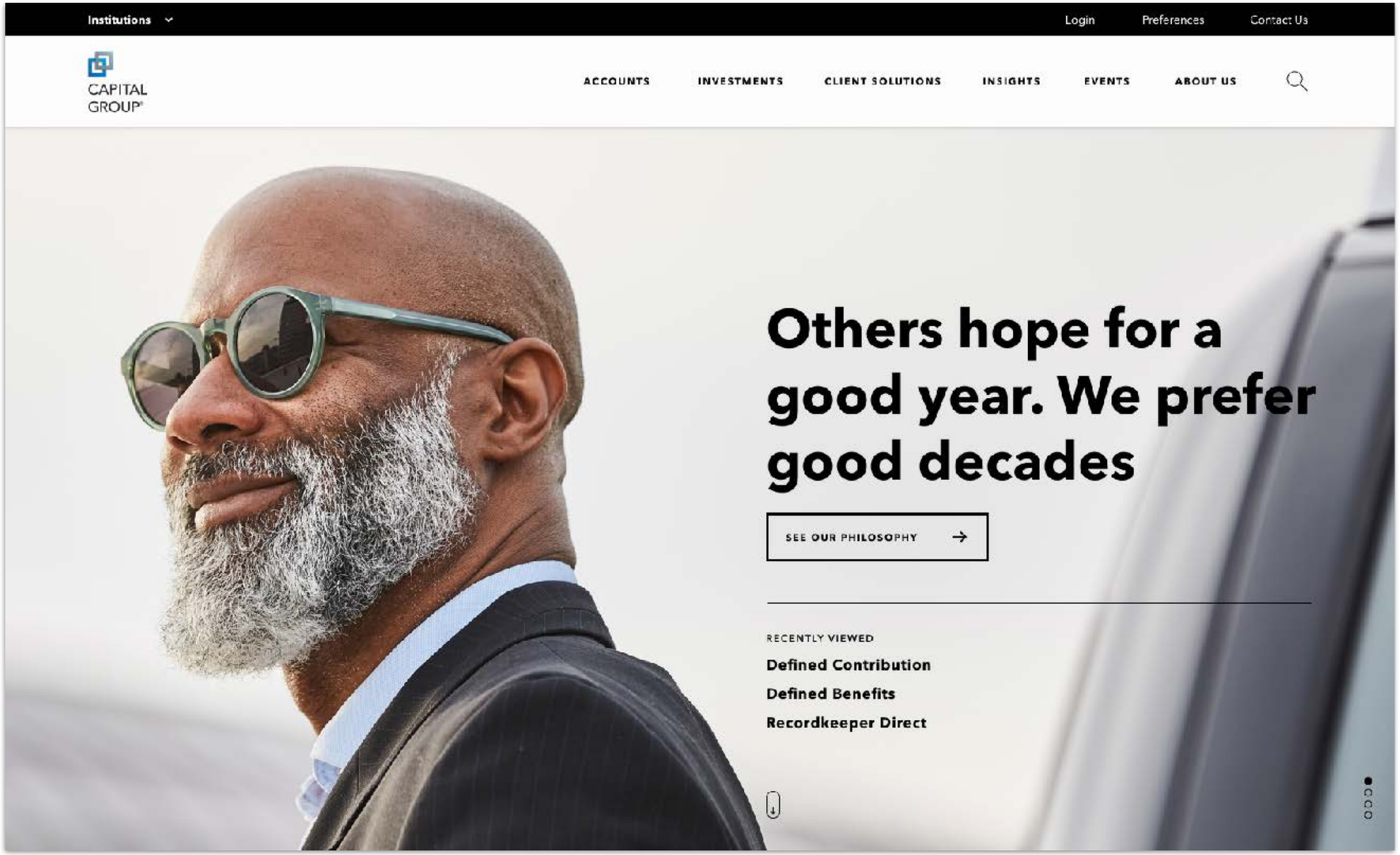
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