Overview/Review

Russell Investments is a global asset manager, offering multi-asset solutions to institutional investors, financial advisors, and individuals guided by an advisor's personalized advice. The approach is personalized, one where each clients' desired outcomes combines solutions that include asset allocation, capital markets insights, factor exposures, manager research, portfolio implementation.

The Russell Investments' website is the public face of the company and one of the first, and most important, service points for clients. As a global company, the site serves the needs and complexities of 17 different regions around the world.

Creating the One Russell Experience

To better serve online visitors, Russell Investments' goal was to create a "One Russell" experience to provide personalization that financial services clients expect.

To deliver a unified, consistently branded website, the XCentium team worked collaboratively with the Russell Investments and Sitecore to integrate several third-party solutions, including several homegrown ones, to create the customized One Russell solution.

The most noteworthy solution was the digitization of Russell Investment's Fund Enhancements, for immediate customer interaction.

Personalized, Streamlined, And Agile

Combining Sitecore's personalization engine and XCentium's implementation capabilities, visitors to Russell Investments websites can access personalized information ranging from their account information to value-added materials aimed at helping customers achieve their investment goals.

In addition, Xcentium and the IT team at Russell Investments collaborated to streamline processes and create efficiencies. Sitecore provides a single platform with one place for updates, delivering consistency and cost savings.

Inside the Russel Investments Digital Success Story:
http://xcentium.com/russell-investments-digital-success-story

Russell Investments

CLIENT
Russell Investments

WEBSITE
www.russellinvestments.com

INDUSTRY
Banking & Financial

SOLUTIONS
Sitecore® Experience PlatformTM (XP), Microsoft Azure B2C, Microsoft Dynamics CRM, Eloqua, Qumram

#1 Rated #1 site among Financial Management firms by Living Ratings based on website personalisation, productivity tools, fund & strategy information, document library & learning materials.

> "The partnership between Sitecore, XCentium, and Russell has allowed us to deliver a much better experience for our end users. It gives us the power to personalize the website and make a better experience for them."
>
> **-Toby Donovan,** Director Of Global Digital Marketing Russell Investments

Russell Investments

CLIENT

Russell Investments
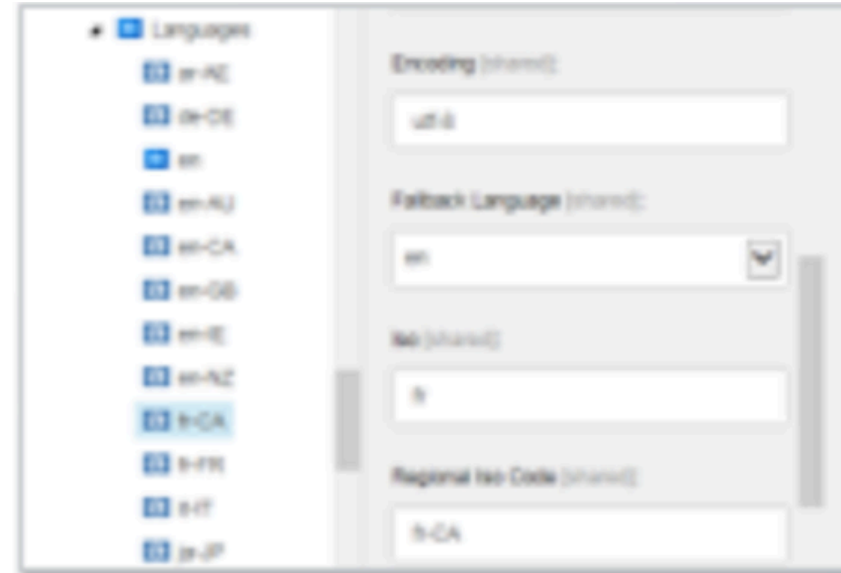
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Localization and Globalization

We also added the ability for each site to have custom base localization options as shown above. This can be useful for a country like Canada where you have multiple languages and multiple date formats in use. In this case, on a users first visit the site would default to English and the US date format. However this may be overridden by the user selecting French as their preferred language.
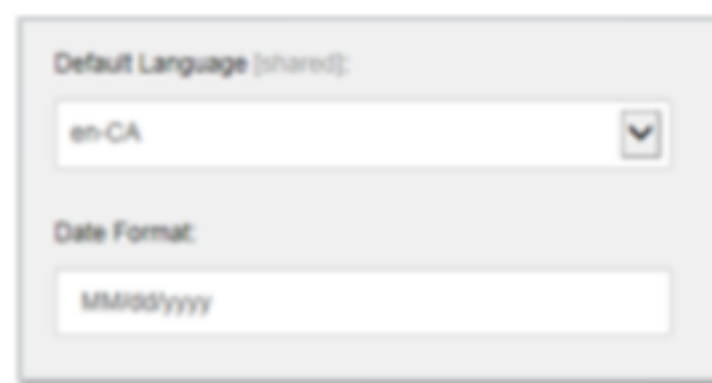
Language fallback saves the content authors a lot of time in that they only need to translate visible text on the page. They generally do not need to localize common graphics, templates and other non-visible page elements. These components can instead all load from a common fallback item version.

Advantages include:

Speeds up content entry

Reduces redundancy and unnecessary versions of items

Allows shared common between all languages

Allows you to make a change in one version and have it affect all languages

Localization and Globalization

Each region has it's own content structure with data folders set for the base settings for that regional site.

This structure allows for the convince to share common content between regions but also the flexibility to make each region unique for its users.

Prior to implementing Sitecore, Russell Investments did not have a formal Taxonomy. Instead, they had data in silos between their numerous web assets.

By working with their business team, we were able to strategize a taxonomy solution that improved Search Results, made relevant content more quickly found, provided context and relevancy for every piece of content, standardized SEO terms, allowed for non-hierarchical relationships, and gave the business the control that needed.
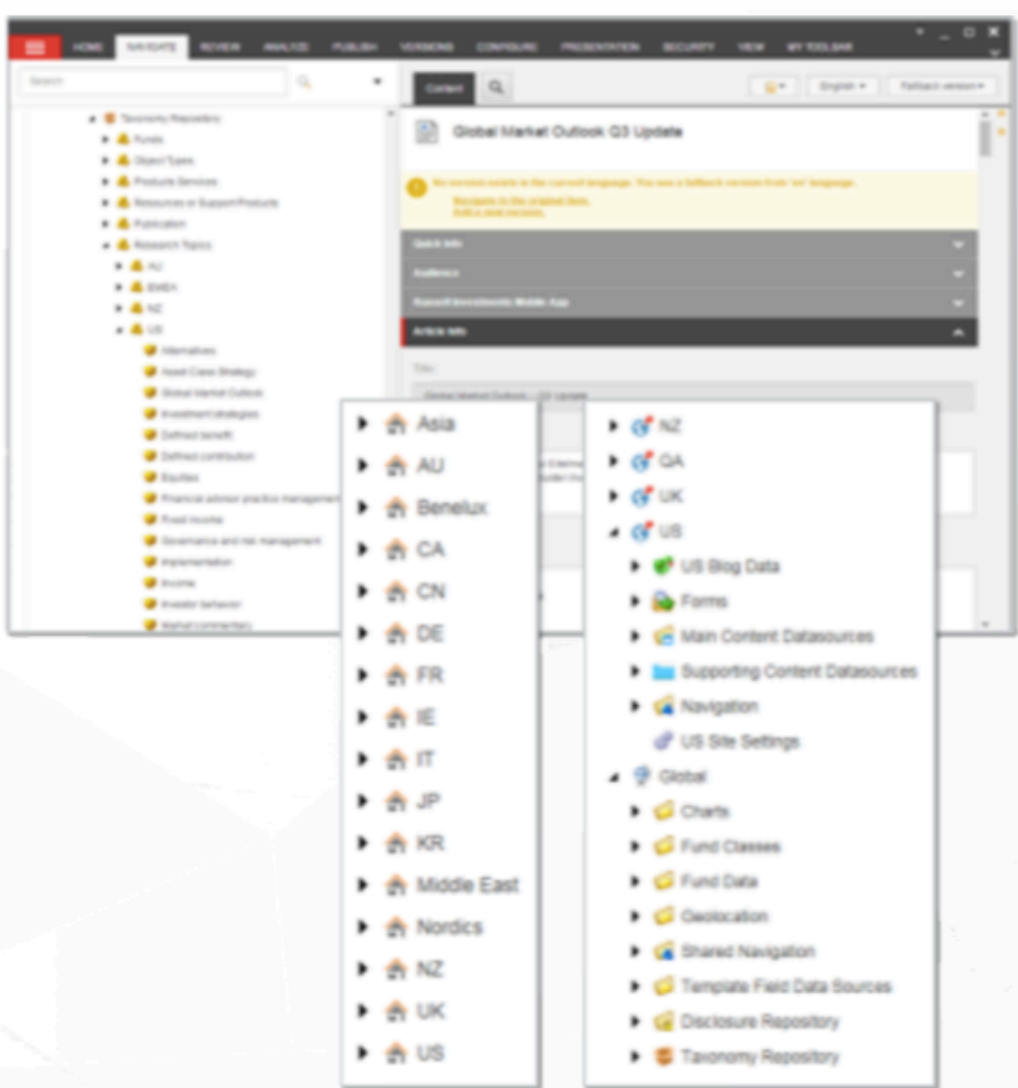
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About the Solution

- The solution is designed to be a mobile first experience as many clients read Insights content and check fund performance on mobile devices.
- Phase 1 launched in April of 2016 on Sitecore version 8.1.
- Phase 2 launched in June of 2017 and included a consolidated authenticated user experience.
- International, Multi-Site, Multi-Lingial
- A strong relationship has formed between XCentium and Russell Investments with solution guidance and Sitecore knowledge transfer being at the core.

Key Integrations / DataPoints

- Microsoft Dynamics CRM
- Microsoft Azure AD
- Sitecore
- Qumram (Dynatrace) Session Recording
- GeoIP
- Angular JS
- Solr
- Connects to several Home-Grown Applications

Key Performance Outcomes

- **Implementation of enterprise CMS following Sitecore best practices**
  A legacy CMS that has limped its way through production over its long life cycle is more common than you may think. Using Sitecore with a proper implementation makes life easier for everyone involved.
- **Ease of use and control for Content Authors**
  It now takes fewer people to do more. With all of the tools included with the Experience Editor and a well thought out Sitecore solution, Sitecore authors have the power to control their website – the days of going to IT for any minor web site requests are long gone.
- **Expandability and future development**
  With a well-engineered solution up and running on a modern enterprise CMS development of future projects becomes easier to manage, develop, and deploy.
- **Marketers**
  The business team now has the power and flexibility to take control of their content. Monitoring engagement analytics sets the stage for further content personalization and multivariate testing.

"We partnered with XCentium to help us with our roll out of Sitecore. They really believed if it there was something we wanted to accomplish for our website, they were going to figure out a way to get it done. I would definitely recommend XCentium."

- **Misty Ford,** Global Head of Marketing