



Mindtree

A Larsen & Toubro Group Company



Streamlined and scaled a leading large asset management firm's content operations and digitally transformed marketing operations boosting productivity and efficiency



Client overview:

The client is a leading American multinational investment bank and financial services company. The client handles asset management and is the private arm of a large global bank with \$3.68 trillion in assets. Mindtree was the change and innovation partner for the CMO (Chief Marketing Officer).

What drove the digital transformation in the marketing department for this large asset management firm?

Need for integration

- Users found it difficult to retrieve podcast skills content from three strategists and economists.
- Various content residing in disparate sources made the discovery process challenging.
- Increase in search time as podcasts were not integrated on one platform and lacked an efficient conversational AI experience.

AI platforms, podcast skills, and websites needed to be streamlined

- In the client ecosystem, all 'React' enabled websites are hosted outside AEM (Adobe Experience Manager), which made it difficult to manage the content. They needed to integrate AEM with React.
- AI platforms and podcast skills integration using Mindtree's Mind Flow conversational platform to:
 - Merge the content from three different podcast skills.
 - Make the content discovery process simple.
 - Make content available on Alexa and Google channels.

Need to enhance customer service

- The client required a means to enable content reuse across multiple channels and was looking to leverage AEM to distribute the content and streamline content consumption by consumers.
- Consolidated AI platform was required to help:
- Portfolio managers and customers access information related to security portfolio allocation, investment strategies, research data, and market data in a fast and efficient manner.
- Reduce time to handle generic queries.

Data modeling requirements

- Data modeling and conversational AI implementation using IPSoft Amelia and AWS Comprehend.
- Conversational AI solution enablement using Natural Language Processing (NLP).
- Technology stack: IPSoft Amelia, AWS Comprehend, integrations with Alexa and Google.

Mindtree enabled the client to reduce call center volumes by 50% with 24x7 availability of services, achieving significant savings in operational costs.

Here is an in-depth view into this journey:

1. *Managed the ongoing content publishing operations for the client's marketing websites*



Challenges:

- While activating new sites using Adobe Experience Manager, the client was facing challenges in page creation and uploading content.
- Needed to identify issues in content operations with more efficient content management.
- Needed to improve productivity and introduce best practices on content authoring.



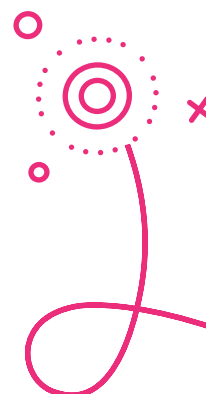
Solution:

- Adopted the new CMS and moved toward a self-service, federated model.
- Handled complex content authoring use cases and handheld the client content authoring team who were new to AEM.
- Developed a content matrix template as a part of the standardization of content handover process.
- Validated content availability against content matrix or checklist.
- Identified processes for automation and accelerators for better performance.
- Regular triage calls with client stakeholders.



Benefits:

- Contributed simultaneously towards business as usual and new site activations.
- Seamless collaboration and handover by providing services in 16x5 mode.
- Implementing authoring best practices resulted in improved operational efficiency by reducing costs.



2. Migration of marketing websites to Adobe Experience Manager



Challenges:

- In the client ecosystem, all 'React' enabled websites were hosted outside AEM, which made it difficult to manage the content.
- Needed to produce the architecture and design of AEM integration with SPA (React) enabled websites.
- Needed to build the logical and physical architecture for enabling 'content-as-a-service' using the AEM platform.



Solution:

- Migrated React applications on AEM and interfaced them with APIGee gateway.
- Technology considerations for content-as-a-service included:
- Leveraging GraphQL (QL for API) and AEM to query content from AEM.
- Setting up APIGee gateway.
- Usage of GraphQL for creating the 'aggregation service'.
- Build and deployment for the service.
- Integration of service to syndicate content to the 'voice channel'.



Benefits:

- Enabled content reuse across multiple channels and leveraged AEM to distribute the content across multiple channels.
- Retired the legacy CMS system that managed the voice channel content.
- Enabled React applications to fetch content articles from AEM by leveraging content services.
- Enabled the business to update content and change layouts of react apps by leveraging AEM.
- AEM as a single source to manage marketing content across the client ecosystem.



3. Conversational solution powered by AI for financial advisors



Challenges:

- As the content of different podcast skills by three different financial strategists and economists was disparately available in Alexa and Google assistant, users had to install all of them separately in order to access the podcasts. This made the content discovery process challenging.
- Financial advisors and portfolio managers who followed these individual strategists separately, could miss the information provided by the other two as the information was not consolidated on one platform. They could lose out on important updates.
- Increase in search time as all the different podcasts were not integrated on one platform and lacked an efficient conversational AI experience.



Solution:

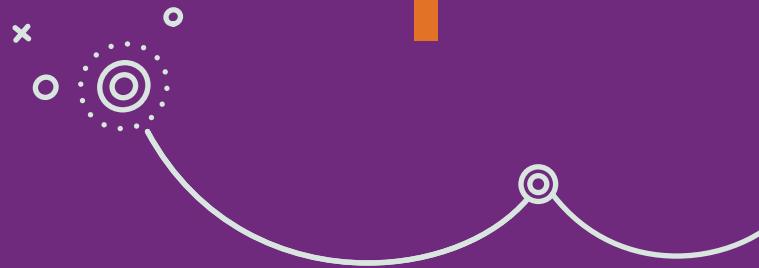
- Conversational AI solution enabled in multimodal devices with both voice and screen-based experiences using Natural Language Processing (NLP) and Amelia platform for Amazon Alexa and Google assistant.
- A content discovery process was designed called Morgan skill, which enables all the three skills (eye on the market, market insights, and my next move) to be integrated under this skill.
- Skill provides different categories encompassing a variety of investment topics, economy, policy markets, lifestyle and family, business decisions and goal setting, trade and tariffs, etc.
- Skill is extremely helpful for financial advisors, portfolio managers, and investors to be educated and updated on financial information covering the above taxonomy and access all of the above on one platform.



Benefits:

- Improved investor and customer experience with 24x7 information availability.
- Showcased advanced digital capabilities and experience with cognitive technologies to potential customers.
- Voice assistants can bring new clients to the firm.
- Conversational AI usage across the firm's business enables cost reduction from a data distribution perspective.
- Usage of conversational AI also reduced call center volumes by 50%.
- Increase in customer satisfaction rate compared to conversations with live agents.





About Mindtree

Mindtree [NSE: MINDTREE] is a global technology consulting and services company that enables enterprises across industries to drive superior competitive advantage, customer experiences and business outcomes by harnessing digital and cloud technologies. A digital transformation partner to more than 260 of the world's most pioneering enterprises, Mindtree brings extensive domain, technology and consulting expertise to help reimagine business models, accelerate innovation and maximize growth. As a socially and environmentally responsible business, Mindtree is focused on growth as well as sustainability in building long-term stakeholder value. Powered by more than 31,900 talented and entrepreneurial professionals across 24 countries, Mindtree — a Larsen & Toubro Group company — is consistently recognized among the best places to work.

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