PIMCO:

Personalized Data Driven Decisions

XCENTIUM

PIMCO

About the Engagement:

Build a best-in-class financial website with a Sitecore mobile-first design, with centralized content management and workflows. Personalize experiences based on user interaction, define and build architecture for seamless smooth rollouts to global regions, create streamline systems for processing and delivering large amounts of data quickly to deliver world class communication.

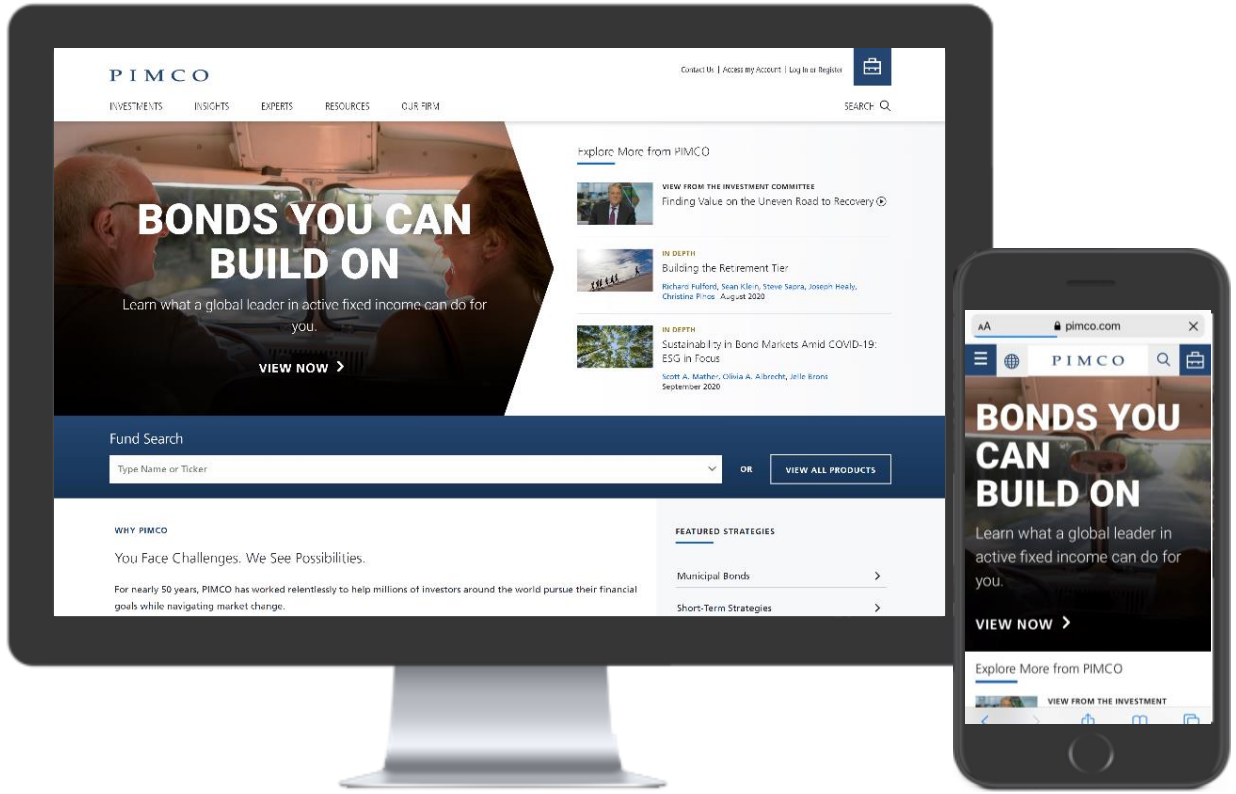
Key Outcomes:

600 FUNDS AGGREGATED IN UNDER 200 MS

20+ INTEGRATIONS

#3 RANKED THIRD OUT OF 300 IN DIGITAL COMMUNICATION AMONG ASSET MANAGERS

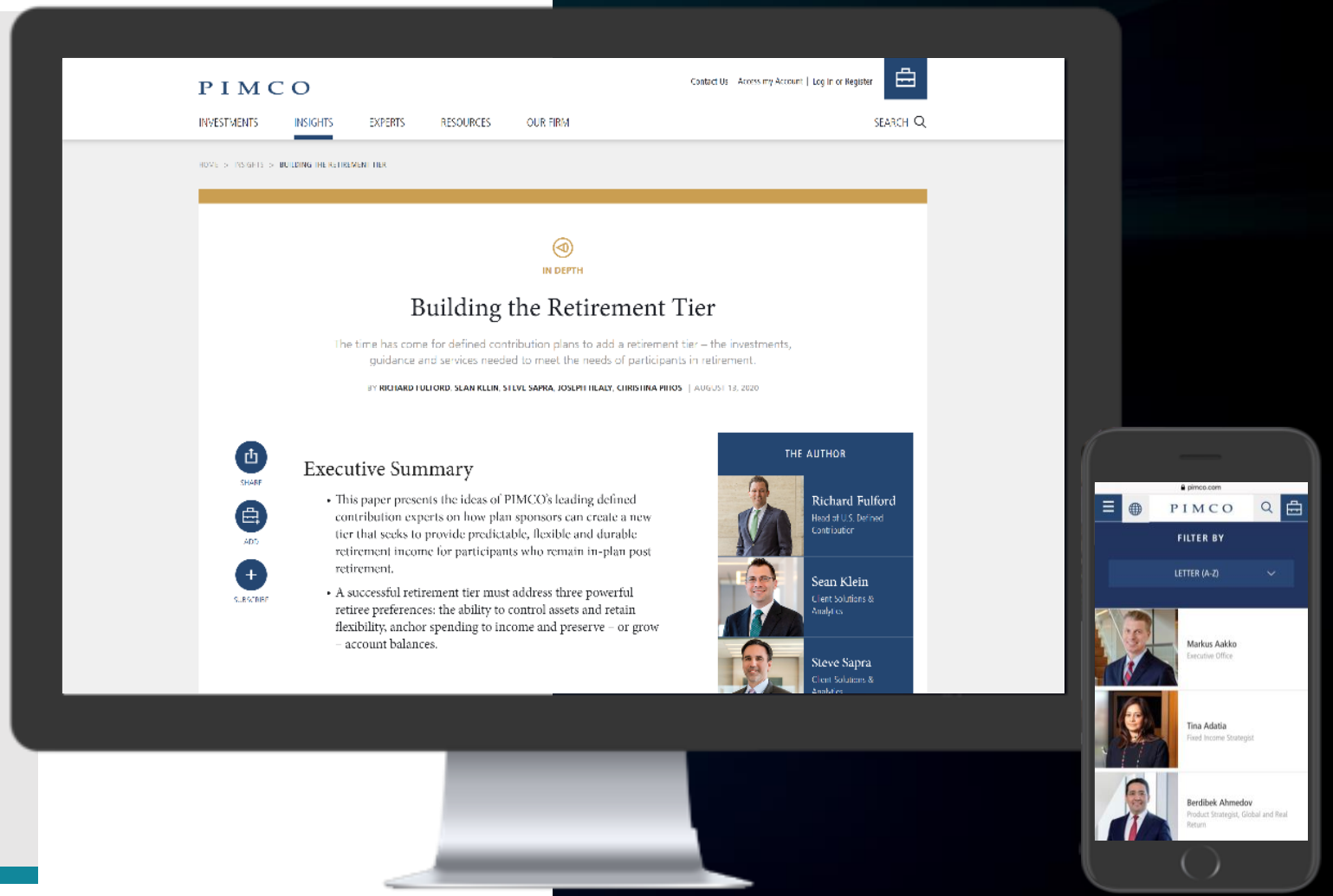
Our Mission: To deliver **a legendary personalized experience** worthy of the PIMCO brand name



PIMCO (Pacific Investment Management Company, LLC) is a global investment management firm focusing on active fixed income management. PIMCO manages investments and develops solutions across the full spectrum of asset classes, strategies and vehicles including fixed income, equities, commodities, asset allocation, ETFs, hedge funds, and private equity.

PIMCO: Scope of Work

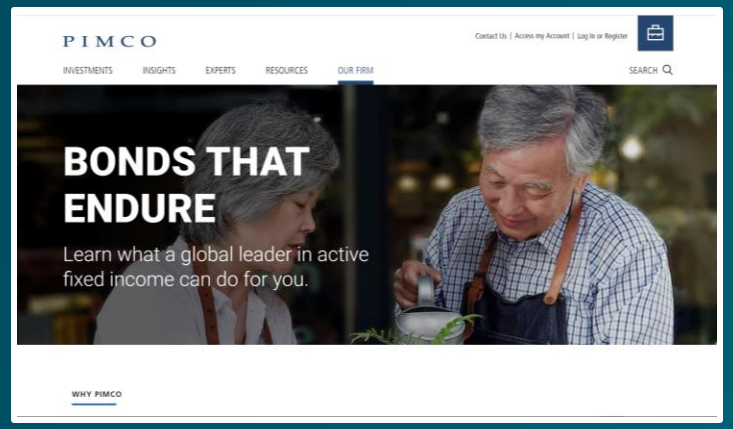
- ✓ Build a **best-in-class financial website** with Sitecore
- ✓ Mobile first design
- ✓ Centralized content management and workflows
- ✓ **Personalized experiences based on user interaction**
- ✓ Define and build architecture for seamless smooth rollouts to global regions
- ✓ Create streamlined and performant systems for **processing and delivering large amounts of data quickly**

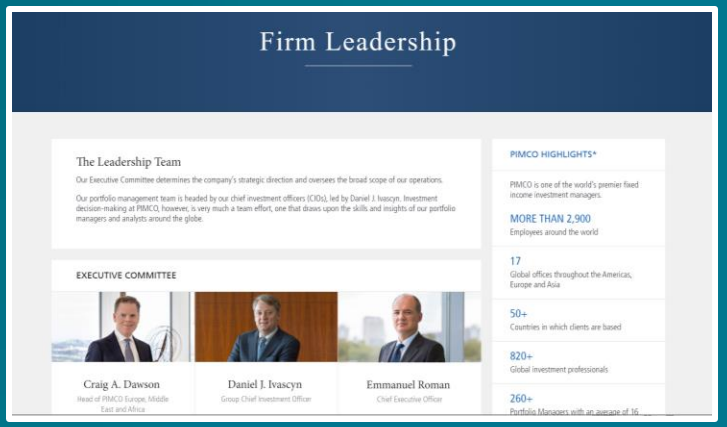


PIMCO: Project Highlights

- ✓ Co-development effort with PIMCO developers XCentium architecting and providing lead developers
- ✓ Collaboration with design agency: AKQA
- ✓ Personalization Heavy
- ✓ Integration Heavy
- ✓ One of the first major Sitecore sites to go live on Sitecore 8
- ✓ Large infrastructure - private cloud

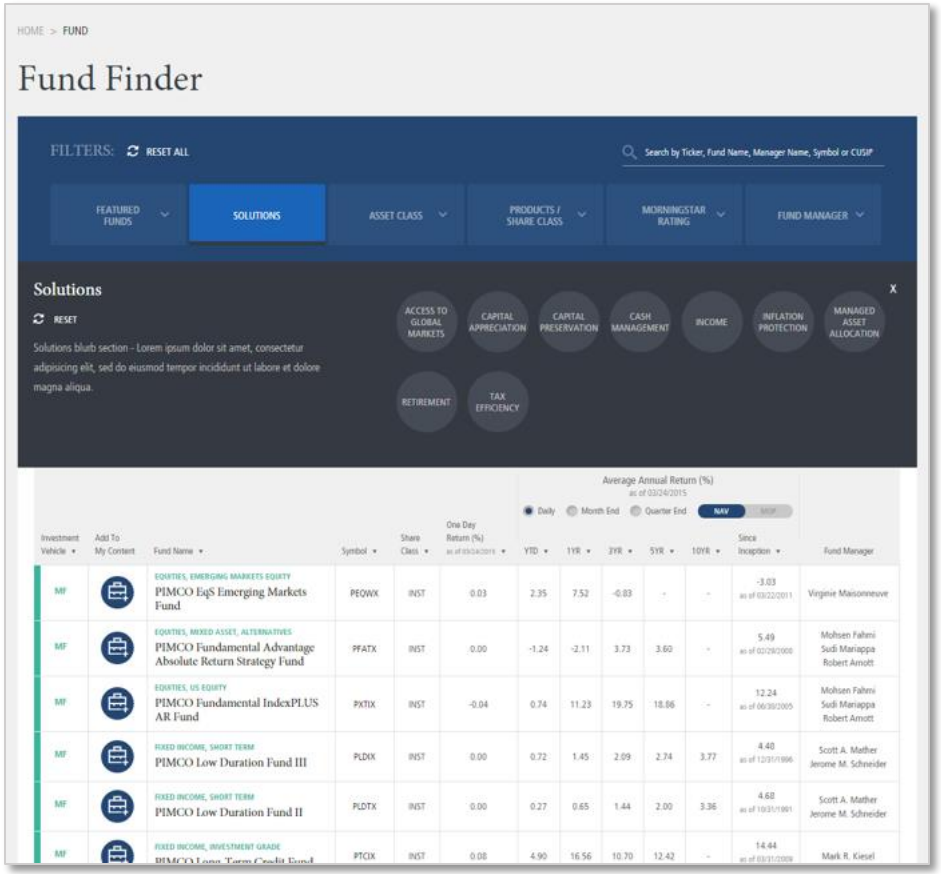
- ✓ The design is a mobile first implementation focusing on quick and user-friendly mobile device usage
- ✓ Responsive design was used through out the implementation
- ✓ The site allows users to set preferences for browsing and the site remembers these preferences for later use





Integrating PIMCO's Data

- ✓ One of the largest challenges in the project was collecting all the data from the downstream PIMCO data systems.
- ✓ PIMCO serves up data for roughly 600 Funds and their share classes. Many of these funds have separate underlying data repositories that must be cohesively connected on the website in a multi-device friendly interface.
- ✓ A challenge was to serve up this data in < 200ms for entire funds pages with changing data. This goal has been met by XCentium developers.
- ✓ Custom implementation of High-charts was implemented to dynamically present performance data on all device types.
- ✓ A state of the art compliance solution was built using Sitecore's rules engine to serve legal disclosure information as well as custom footnotes
- ✓ The solution is focus around easy of use for the editorial staff maintaining the highly complex pages.



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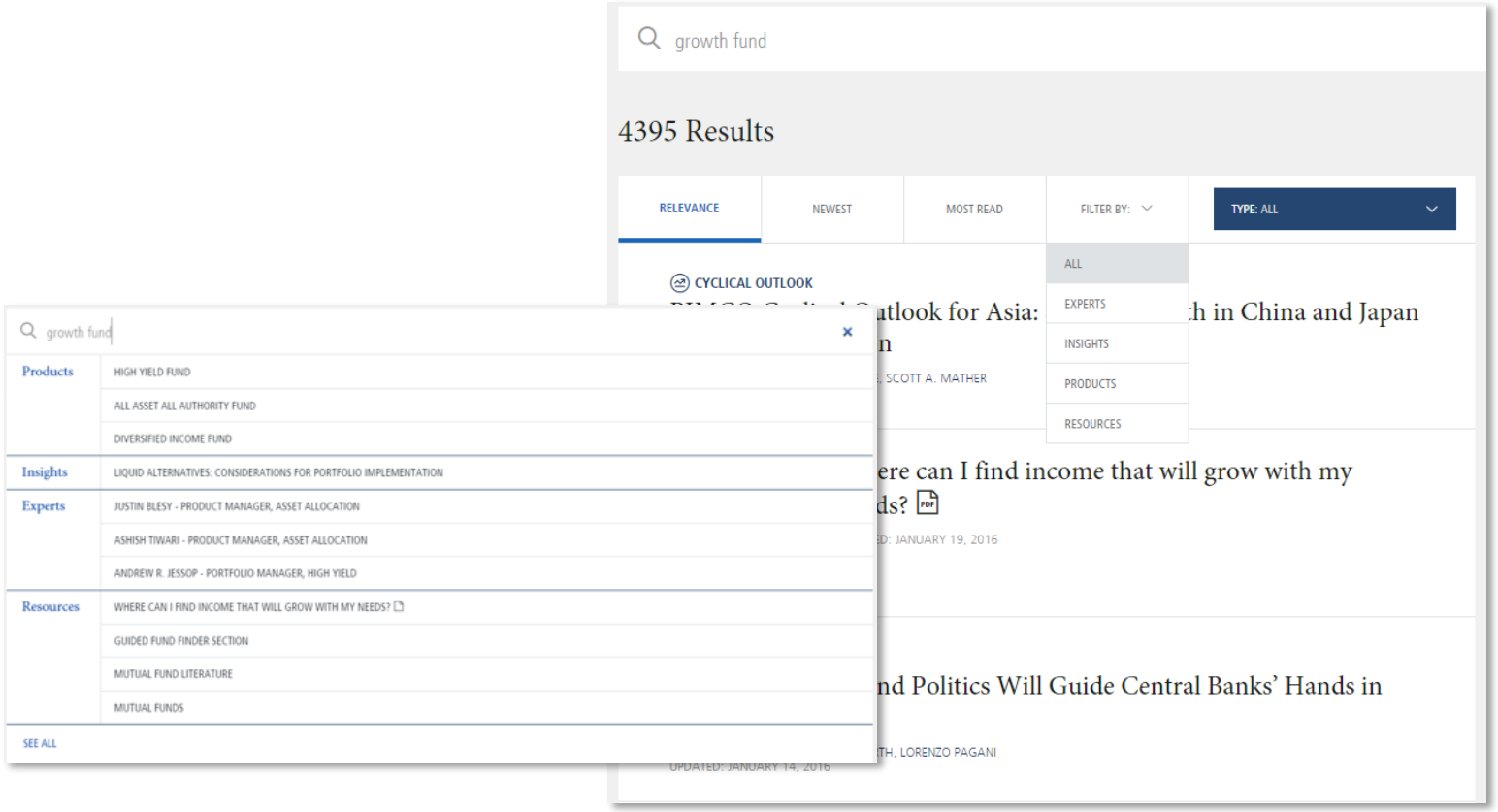
PIMCO: A Great Search Experience



PIMCO: How Do We Build a Great Search Experience?

- ✓ Simple, clean and welcoming interface
- ✓ Content-specific result designs
- ✓ Predictive search
- ✓ Suggestive search
- ✓ Faceted search
- ✓ Personalization
- ✓ Spellcheck
- ✓ Search result boosting
- ✓ Analytics