



CFA Institute

# CFA Institute

## Global CMS Modernization

### User-Centric Digital Transformation

Senior Product Manager +  
Enterprise CMS Product Owner

Americas • APAC • EMEA

## EXECUTIVE SUMMARY

CFA Institute engaged me to lead a multi-platform CMS modernization spanning twelve regional sites, nine legacy CMS platforms, and more than 2,500 content pages. As Senior Product Manager and Enterprise CMS Product Owner, I owned platform strategy, backlog prioritization, and governance to unify global content delivery. The engagement required stabilizing fragmented platforms, planning and executing a large-scale migration to Sitecore 9, and aligning design, engineering, and editorial teams across regions. The result was improved UX performance, reduced operational overhead, and a scalable foundation for global growth.

## BUSINESS OUTCOMES



49%

improvement in UX  
efficiency and task  
completion



9

Custom CMS platforms  
merged into a unified  
system



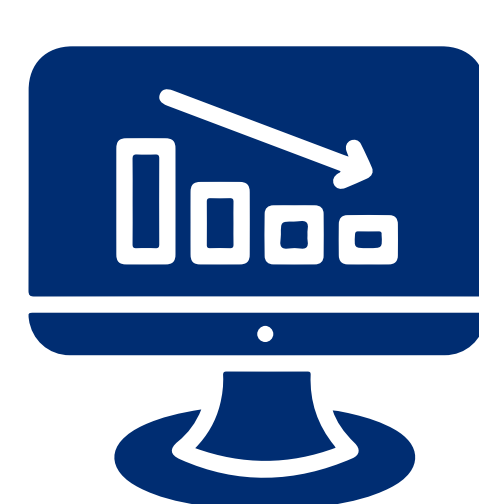
33%

increase in product  
downloads and  
subscriptions



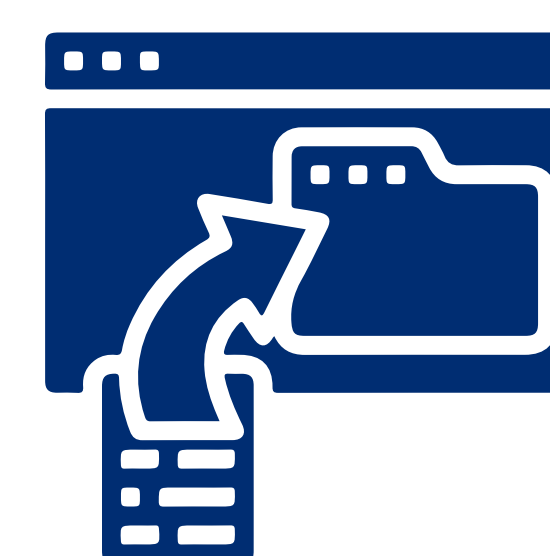
56%

increase in global  
web traffic



30%

reduction in help  
desk volume



2,500+

content pages  
migrated

This modernization became the foundation for CFA's global scale, future technology investments, and long-term platform governance.



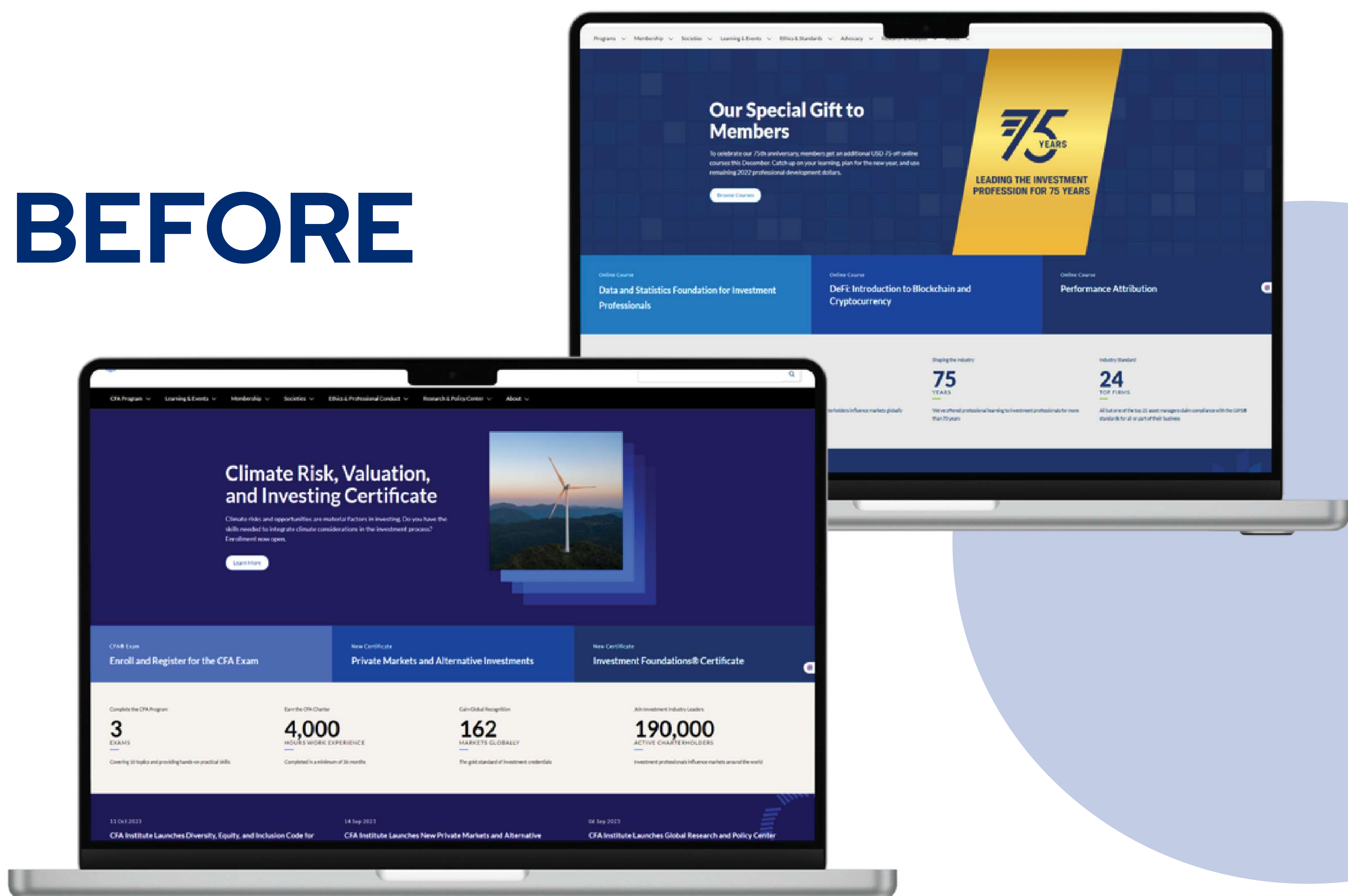
# BEFORE THE TRANSFORMATION

CFA's digital ecosystem was fragmented:

- » 9 custom CMS systems with inconsistent UX patterns
- » 12 regional websites with different structures and content standards
- » High support volume due to confusing navigation and outdated components
- » Developer-only components restricted editorial autonomy
- » Slow release cycles and unclear prioritization
- » Content duplicated across platforms without governance
- » No unified analytics model to measure global performance
- » Inconsistent taxonomy and tagging across regions

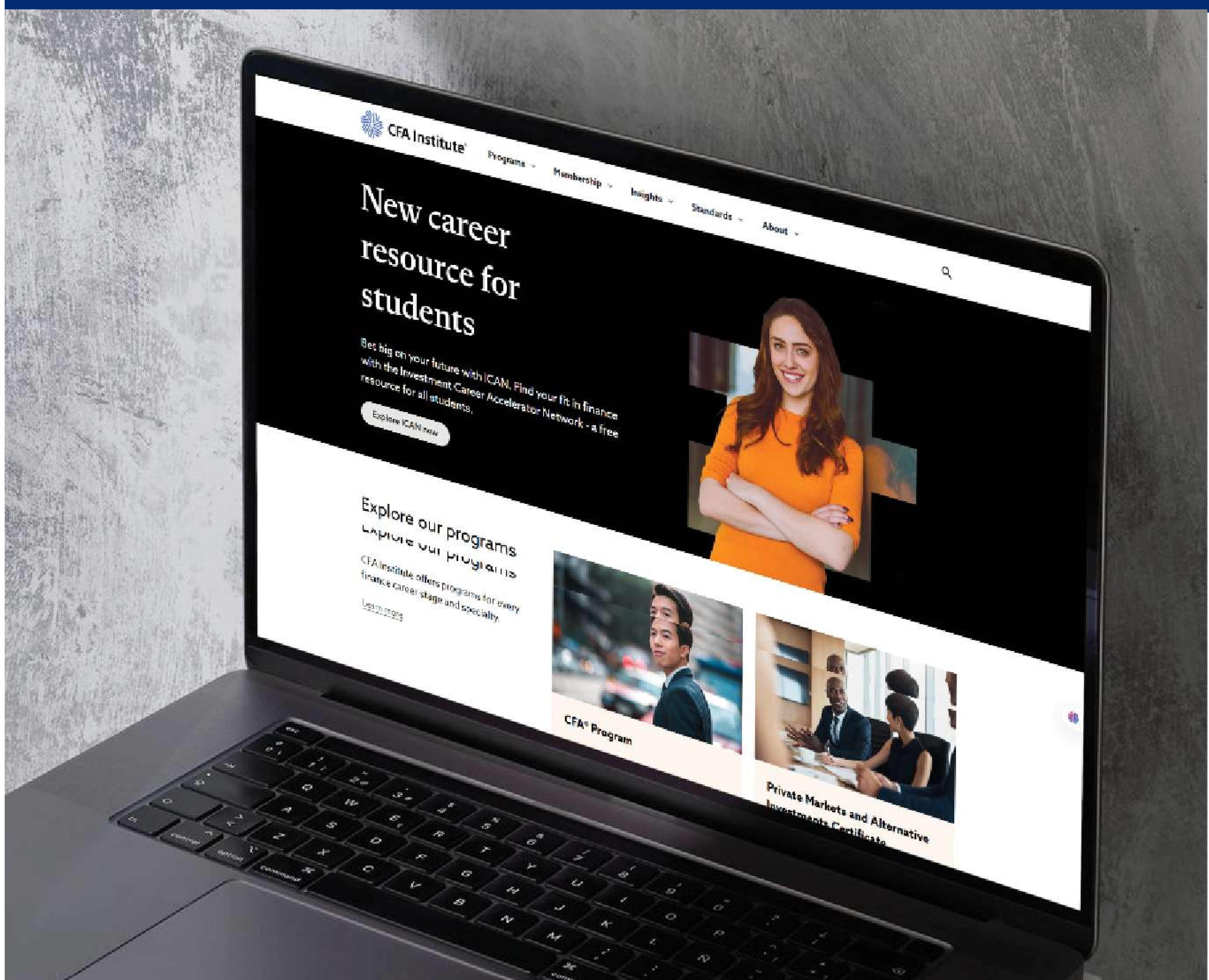
**Editors lacked autonomy, users struggled to complete tasks, and leadership lacked global visibility, which slowed delivery speed and increased operational cost.**

## BEFORE





# AFTER THE TRANSFORMATION



As Senior Product Manager and Enterprise CMS Product Owner, I led a multi-year Sitecore 9 migration that unified legacy platforms, improved UX efficiency, reduced operational overhead, and built a scalable foundation for global growth.



## Enterprise Migration to Sitecore 9

- Consolidated 9 legacy CMS platforms
- Migrated 2,500+ pages of content
- Standardized navigation, taxonomy, page templates, and governance
- Established global design-system foundations
- Established continuous delivery cadence (one redesigned site every six to eight months)



## UX Overhaul Using Behavior-Driven Design.

- Achieved 49% improvement in UX efficiency
- Simplified customer journeys and high-value pathways
- Reduced time-to-task and improved page clarity
- Improved search relevance and information architecture



## Scalable Global Governance

- Defined clear editorial roles and responsibilities
- Established region-specific permissions
- Centralized content strategy and workflows
- Introduced a global component library for reuse across all regions



## Reduction in Operational Load

- Reduced support tickets by 30%
- Modernized editorial workflows
- Automated publishing processes, reducing manual steps



## Analytics, Performance & Reporting

- Achieved 56% increase in global traffic
- Redesigned KPI dashboards
- Introduced a unified analytics model across regions



## Leadership Approach

- Connected VP-level stakeholders across product, marketing, and technology
- Defined a globally consistent roadmap and migration strategy
- Translated complex regional requirements into precise user stories
- Led sprint planning, backlog refinement, UAT, and release readiness

## PROCESS & DELIVERY FRAMEWORK

### Discovery

- Audited 9 CMS platforms
- Mapped user journeys and identified friction points
- Conducted stakeholder interviews across 3 regions

### Validation & Optimization

- Validated content accuracy and component behavior using Sitecore reporting tools
- Led accessibility and QA cycles

### Architecture & Strategy

- Defined new content model
- Created governance framework and modern editorial workflows

### Implementation

- Directed Sitecore 9 configuration for global scale
- Managed component redesign and headless strategy
- Oversaw content migration processes
- Led iterative UX cycles with cross-functional partners

## TECHNOLOGY STACK

- **CMS:** Sitecore 9
- **Integrations:** Salesforce, legacy API suites
- **Analytics:** Google Analytics, custom KPI dashboards
- **Workflow Tools:** Jira, Confluence, GitHub
- **Data:** SQL validation, analytics tagging, structured data models

## CLOSING STATEMENT

This modernization transformed CFA Institute’s fragmented digital ecosystem into a stable, scalable, and user-centered platform that supports global education experiences. By consolidating legacy systems into Sitecore 9, improving UX flows, strengthening governance, and reducing support demand, the organization gained a sustainable architecture that enables faster delivery, clearer decision-making, and long-term adaptability in a rapidly evolving digital landscape.