

# Content Process Blueprint

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Foleon & AEM Production Workflow

Prepared by:	<b>Digital Marketing COE — CX Team</b>
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# Table of Contents

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1. Purpose & Scope
2. Three Delivery Scenarios
3. Master Process Workflow
4. Scenario A: Foleon Only — Detailed Workflow
5. Scenario B: Foleon + AEM Elements — Detailed Workflow
6. Scenario C: Foleon Embedded in AEM — Detailed Workflow
7. Scenario Comparison Matrix
8. QA Severity Framework
9. Feedback Protocol
10. Post-Launch & Continuous Improvement
11. Next Steps

# 1. Purpose & Scope

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This blueprint defines the end-to-end content production process for all Foleon-based digital assets created by the Digital Marketing COE, whether standalone or integrated with Adobe Experience Manager (AEM).

It establishes a repeatable, governed workflow that ensures every content asset meets the organization's standards for accessibility, SEO, analytics, brand compliance, and user experience before publication.

## Who This Is For

- Digital Marketing COE — CX, Design, Platform, Analytics, SEO teams
- Creative team — Foleon designers and content creators
- Business stakeholders — Report owners and campaign managers
- IT / Project Management — Wrike project owners and coordinators

## What This Covers

- Three delivery scenarios: Foleon Only, Foleon + AEM, Foleon Embedded in AEM
- Detailed workflows with owners, durations, gates, and feedback loops per scenario
- Quality gates, feedback protocols, and QA severity framework
- Scenario-specific requirements for SEO, analytics, platform, and CX

## How to Read the Workflows

Each scenario includes a detailed visual workflow. Here is the legend for reading them:

■ Standard Step	■ Approval Gate	■ Feedback Loop	■ Parallel Track
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## 2. Three Delivery Scenarios

Every content project falls into one of three scenarios. The scenario determines the team composition, ticket structure, technical requirements, and timeline.

### SCENARIO A: Foleon Only

A standalone Foleon asset hosted on info.marsh.com. No AEM pages are created or modified.

**Examples:** Interactive reports (e.g., Global Talent Trends), gated content via direct URL, campaign microsites.

**Platform involvement:** Minimal — hosting configuration only.

**Estimated total timeline:** 3–4 weeks.

### SCENARIO B: Foleon + AEM Elements

A Foleon asset supported by AEM pages. AEM provides landing pages, forms, or CTAs. The Foleon asset is the primary content experience.

**Examples:** Foleon report with AEM landing page for lead capture, gated reports with AEM forms.

**Platform involvement:** Moderate — AEM page build plus hosting.

**Estimated total timeline:** 4–6 weeks.

### SCENARIO C: Foleon Embedded in AEM

A Foleon asset rendered inside an AEM page via iframe or reverse proxy. The user never leaves the AEM site.

**Examples:** Brand page (corporate.marsh.com), homepages with embedded Foleon components.

**Platform involvement:** High — embed implementation, CSP, security, and performance from day one.

**Estimated total timeline:** 5–8 weeks.

### Scenario Decision Framework

Question	Result
Does the content need to live inside an AEM page?	YES → Scenario C
Does the project require AEM landing pages, forms, or navigation?	YES → Scenario B
Is the Foleon asset fully standalone?	YES → Scenario A

### 3. Master Process Workflow

This is the high-level workflow that applies to all three scenarios. Each step shows the owner and estimated duration. Scenario-specific variations are detailed in Sections 4, 5, and 6.





## 4. Scenario A: Foleon Only — Detailed Workflow

### SCENARIO A: Standalone Foleon asset on info.marsh.com

This is the simplest path. No AEM pages are involved. The entire user experience happens within Foleon. Estimated total timeline: 3–4 weeks.

■ Standard Step	■ Approval Gate	■ Feedback Loop	■ Parallel Track
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<b>A1</b>	<b>Intake &amp; Project Setup</b> Stakeholder submits materials, objectives, audience, launch date, distribution plan.	Owner <b>IT / PM</b>	Duration <b>1 day</b>	Status <input type="checkbox"/>
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<b>A2</b>	<b>CX Strategy Review</b> Define user journey from entry (URL, email, social) through Foleon to exit. Map navigation, content hierarchy, scroll depth, mobile-first approach.	Owner <b>CX Team</b>	Duration <b>2–3 days</b>	Status <input type="checkbox"/>
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**CX Output:** CX brief documenting IA, journey, entry/exit points. Shared with SEO and Analytics.



<b>GATE: GATE 1: Stakeholder confirms content structure. No design work begins without this approval.</b>
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▼ **PARALLEL TRACKS** ▼

<b>SEO Requirements</b>	<b>Analytics Plan</b>
SEO Team	Analytics Team
<i>2 days</i>	<i>2 days</i>

SEO prepares: page titles, meta descriptions, alt text guidelines, OG tags, canonical URL, indexing strategy for gated content, atomized content SEO plan.

Analytics prepares: event triggers, scroll depth tracking, engagement parameters, dashboard setup. Adobe Analytics via platform-wide remarketing code.



<b>A3</b>	<b>Designer: Checklist &amp; Preview Build</b> Apply template, accessibility standards (WCAG AA), naming convention, Osano, LCPA. Use AI tools (Claude, Figma Make) if content is insufficient.	Owner <b>Designer</b>	Duration <b>3–5 days</b>	Status <input type="checkbox"/>
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<b>A3b</b>	<b>Preview Review</b> Directional check on structure, content, and look/feel. Not a polish review.	Owner <b>QA + IT + Stakeholders</b>	Duration <b>1 day</b>	Status <input type="checkbox"/>
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🔄 **FEEDBACK LOOP:** Misalignment on structure or content → Designer adjusts → re-preview if needed



🛑 **GATE:** GATE 2: Stakeholder approves content substance. Changes after this point require a change request.



<b>A4</b>	<b>Full Foleon Build</b> Complete build with SEO tags (from SEO doc), analytics tracking (from Analytics plan), all accessibility, Osano, LCPA, metadata.	Owner <b>Designer</b>	Duration <b>3-4 days</b>	Status <input type="checkbox"/>
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<b>A5</b>	<b>QA — Internal Review</b> Full checklist: accessibility, branding, multi-device (1920/1440/768/375px), content, links, performance.	Owner <b>QA Team</b>	Duration <b>2 days</b>	Status <input type="checkbox"/>
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Scenario A additional QA: standalone URL behavior, direct link testing, social sharing preview (OG tags render on LinkedIn/X), Osano functionality, LCPA links.



🔄 **FEEDBACK LOOP:** P1 blockers → back to Designer → fix → re-submit. P2 logged with deadline. P3 logged for retro.



▼ **PARALLEL TRACKS** ▼

<b>SEO Validation</b>	<b>Analytics Validation</b>
SEO Team	Analytics Team
1 day	1 day

SEO confirms all metadata, alt text, headings, indexing match requirements. Analytics confirms tracking fires, data flows to dashboard, events capture correctly.



🔄 **FEEDBACK LOOP:** Corrections needed → Designer fixes → specialist re-validates



<b>A6</b>	<b>Stakeholder Final Review</b> Production-ready review across devices. Structured feedback: 48hr window, one contact, max 2 rounds.	Owner <b>Stakeholders</b>	Duration <b>2 days</b>	Status <input type="checkbox"/>
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<b>A6b</b>	<b>Feedback Implementation</b> Address feedback. Flag if changes touch accessibility, SEO, or analytics.	Owner <b>Designer</b>	Duration <b>1-2 days</b>	Status <input type="checkbox"/>
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🔄 **FEEDBACK LOOP:** Changes affecting A11y/SEO/Analytics → respective team re-validates before proceeding



<b>A7</b>	<b>Final QA &amp; Sign-off</b>	Owner	Duration	Status
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A7	No P1 items remain. Written approval in Wrike.	<b>QA + Stakeholders</b>	<b>1 day</b>	<input type="checkbox"/>
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**GO/NO-GO: GO/NO-GO:** All tickets closed. info.marsh.com hosting confirmed. Osano, LCPA, analytics verified.



A8	<b>Publish</b> Asset published on info.marsh.com. Rollback = unpublish (simple).	Owner <b>IT / PM</b>	Duration <b>Same day</b>	Status <input type="checkbox"/>
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A9	<b>Post-Launch</b> Monitor traffic, events, performance. Retrospective within 1 week. Version log started.	Owner <b>Analytics + Designer</b>	Duration <b>72 hrs + retro</b>	Status <input type="checkbox"/>
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## 5. Scenario B: Foleon + AEM — Detailed Workflow

**SCENARIO B: Foleon asset + AEM landing pages, forms, or CTAs**

Two platforms, one user journey. The critical challenge is ensuring seamless transitions between AEM and Foleon. AEM work runs as a parallel track with defined sync points. Estimated total timeline: 4–6 weeks.

<span style="color: #0070c0;">■</span> Standard Step	<span style="color: #c00000;">■</span> Approval Gate	<span style="color: #ff9900;">■</span> Feedback Loop	<span style="color: #0070c0;">■</span> Parallel Track
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<b>B1</b>	<p><b>Intake &amp; Project Setup</b> Stakeholder specifies both Foleon scope and AEM requirements (landing page, forms, CTAs). IT creates Wrike project with core + AEM tickets.</p>	Owner <b>IT / PM</b>	Duration <b>1–2 days</b>	Status <input type="checkbox"/>
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<b>B2</b>	<p><b>CX Strategy Review</b> Map full journey: AEM landing → Foleon content → AEM return/exit. Identify transition seams. Plan form-to-content handoff.</p>	Owner <b>CX Team</b>	Duration <b>3 days</b>	Status <input type="checkbox"/>

**Key CX risk:** Does the user feel a “seam” when moving between platforms? Design continuity, visual language, and navigation patterns must be planned upfront.

**⊖ GATE: GATE 1: Stakeholder confirms content structure AND cross-platform journey design**

▼ **PARALLEL TRACKS** ▼

SEO Planning	Analytics Planning	AEM Page Build
SEO Team	Analytics Team	Platform + Designer
2–3 days	2–3 days	5–7 days

**SEO:** Define canonical URL (typically AEM for gated content). Address both URLs. Avoid duplicate content signals. OG metadata may differ per platform.

**Analytics:** Cross-platform attribution. User tracking from AEM to Foleon and back. URL parameter strategy aligned. Conversion events (AEM forms) linked to Foleon engagement.

**AEM:** Landing page, forms, and navigation built in parallel. Platform configures info.marsh.com hosting.

<b>B3</b>	<p><b>Designer: Foleon Preview Build</b> Build Foleon asset with design continuity to AEM. Consistent visual language, typography, navigation patterns across platforms.</p>	Owner <b>Designer</b>	Duration <b>3–5 days</b>	Status <input type="checkbox"/>
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<b>B3b</b>	<b>Preview: Cross-Platform Journey</b> Validate AEM → Foleon → AEM journey. Check transition points, form flow, visual consistency.	Owner <b>QA + IT + Stakeholders</b>	Duration <b>1–2 days</b>	Status <input type="checkbox"/>
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↻ **FEEDBACK LOOP:** Journey issues or design misalignment → Designer + Platform adjust → re-preview



🚫 **GATE:** GATE 2: Stakeholder approves content + journey across both platforms



<b>B4</b>	<b>Full Foleon Build + AEM Finalize</b> Complete Foleon build with SEO/Analytics specs. AEM page finalized. Cross-platform links and URL parameters configured.	Owner <b>Designer + Platform</b>	Duration <b>3–5 days</b>	Status <input type="checkbox"/>
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<b>B5</b>	<b>QA — Internal Review</b> Standard checklist on Foleon PLUS cross-platform testing: AEM→Foleon→AEM, form submissions, URL parameter passing, visual consistency across transition.	Owner <b>QA Team</b>	Duration <b>3 days</b>	Status <input type="checkbox"/>
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↻ **FEEDBACK LOOP:** P1 blockers → Designer/Platform fix → re-test. Cross-platform issues may require both teams.



▼ **PARALLEL TRACKS** ▼

<b>SEO Validation</b>	<b>Analytics Validation</b>
SEO Team	Analytics Team
1–2 days	1–2 days

SEO validates both AEM page and Foleon asset. Canonical URLs confirmed. No duplicate signals. Analytics validates cross-platform tracking. User attribution flows correctly. Form conversion events fire.



↻ **FEEDBACK LOOP:** Corrections → Designer/Platform fix → specialist re-validates



<b>B6</b>	<b>Stakeholder Final Review</b> Review complete journey across both platforms on all devices. 48hr window, max 2 rounds.	Owner <b>Stakeholders</b>	Duration <b>2 days</b>	Status <input type="checkbox"/>
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<b>B6b</b>	<b>Feedback Implementation</b> Address feedback. Changes may affect either or both platforms. Flag cross-platform impacts.	Owner <b>Designer + Platform</b>	Duration <b>2–3 days</b>	Status <input type="checkbox"/>
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🔄 **FEEDBACK LOOP:** Changes to one platform that affect the other → both teams coordinate and re-validate

<b>B7</b>	<b>Final QA &amp; Sign-off</b> Both platforms validated. Cross-platform journey confirmed. Written approval.	Owner <b>QA + Stakeholders</b>	Duration <b>1 day</b>	Status <input type="checkbox"/>
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⊖ **GO/NO-GO:** GO/NO-GO: Both AEM and Foleon ready simultaneously. Hosting, Osano, LCPA, analytics on both.

<b>B8</b>	<b>Publish Both Assets</b> AEM page and Foleon asset go live simultaneously. Rollback = take down both (define sequence).	Owner <b>IT / PM + Platform</b>	Duration <b>Same day</b>	Status <input type="checkbox"/>
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<b>B9</b>	<b>Post-Launch</b> Monitor both platforms. Cross-platform attribution verified. Retrospective within 1 week.	Owner <b>Analytics + Designer</b>	Duration <b>72 hrs + retro</b>	Status <input type="checkbox"/>
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## 6. Scenario C: Foleon Embedded in AEM — Detailed Workflow

**SCENARIO C: Foleon rendered inside an AEM page via iframe or reverse proxy**

This is the most technically complex scenario. The Foleon content must feel native to the AEM page. Platform team is involved from day one. Estimated total timeline: 5–8 weeks.

**Known limitation:** Full Foleon reports cannot be embedded in the current AEM implementation. Scenario C is currently limited to component-level embeds (homepage sections, brand page elements).

<span style="color: #0070c0;">■</span> Standard Step	<span style="color: #c00000;">■</span> Approval Gate	<span style="color: #ffc000;">■</span> Feedback Loop	<span style="color: #0070c0;">■</span> Parallel Track
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<b>C1</b>	<p><b>Intake &amp; Project Setup</b></p> <p>Stakeholder specifies AEM page + embed behavior (full page takeover vs. section). IT creates Wrike project with core + embed-specific tickets.</p>	<p>Owner <b>IT / PM</b></p>	<p>Duration <b>1–2 days</b></p>	<p>Status <input type="checkbox"/></p>
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<b>C2</b>	<p><b>CX Strategy Review</b></p> <p>Evaluate embed interaction with AEM page. Scroll behavior, responsive breakpoints in container, loading experience, native feel assessment.</p>	<p>Owner <b>CX Team + Platform</b></p>	<p>Duration <b>3–4 days</b></p>	<p>Status <input type="checkbox"/></p>
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**Key CX risk:** The embed must be invisible. If users sense they’re interacting with a different system inside the page, the experience is broken. No scroll-within-scroll. No loading jarring.



<b>C2b</b>	<p><b>Platform Technical Assessment</b></p> <p>Assess embed method (iframe vs. reverse proxy). Document CSP headers, cookie consent, security requirements. Identify known constraints.</p>	<p>Owner <b>Platform Team</b></p>	<p>Duration <b>2–3 days</b></p>	<p>Status <input type="checkbox"/></p>
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**🚫 GATE: GATE 1: Stakeholder + Platform confirm embed approach is technically feasible and CX strategy is approved**



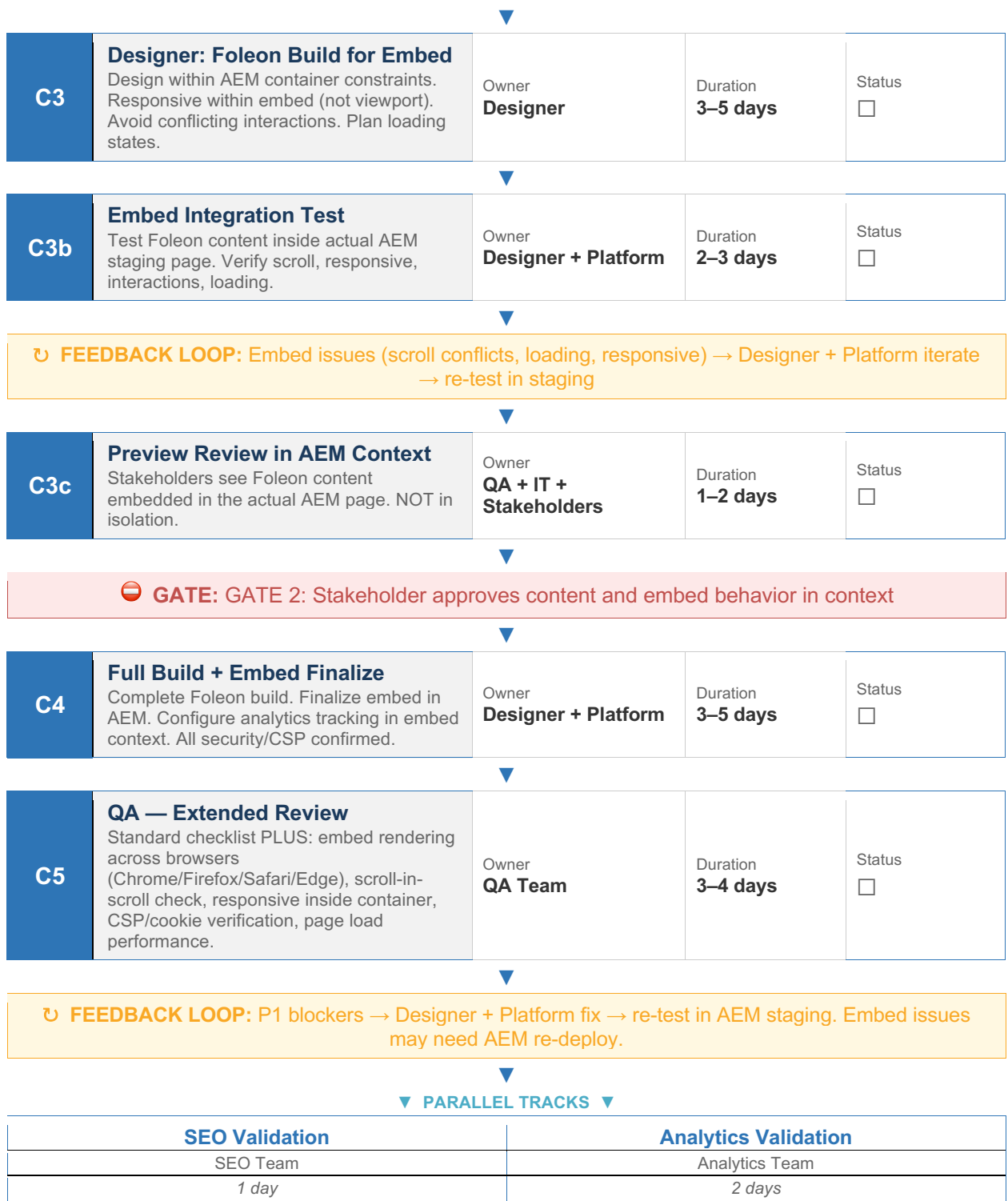
▼ **PARALLEL TRACKS** ▼

SEO Planning	Analytics Planning	AEM Embed Setup
SEO Team	Analytics Team	Platform Team
2 days	3 days	5–7 days

SEO: All SEO lives on the AEM page. Iframe content typically not crawled. Metadata, structured data on AEM page only.

Analytics: Most complex scenario. Verify events fire inside embed. Configure cross-origin tracking if needed. Map Foleon engagement to AEM page in dashboards.

Platform: Configure embed container in AEM staging. Set up CSP headers, cookie consent, security protocols. Test basic embed rendering.



SEO validates AEM page metadata (Foleon content not crawlable via iframe). Analytics validates tracking works inside embed — this is the most critical validation in Scenario C.



## 7. Scenario Comparison Matrix

Use this reference to quickly compare how the three scenarios differ across key dimensions.

Dimension	A: Foleon Only	B: Foleon + AEM	C: Embedded
Hosting	info.marsh.com	info.marsh.com + AEM	AEM site (embed)
Platform Team	Minimal	Moderate	High — day one
SEO Ownership	Foleon URL	Both URLs	AEM page only
Analytics	Standard Foleon	Cross-platform	Within embed
User Journey	Foleon only	AEM → Foleon → AEM	Within AEM page
CX Risk	Nav clarity, exit	Transition seams	Scroll, loading, native
QA Complexity	Standard	High	Highest
Est. Timeline	3–4 weeks	4–6 weeks	5–8 weeks
Rollback	Unpublish	Two assets	AEM re-deploy
Teams Involved	4–5	5–6	6–7
Total Steps	~14	~16	~18+
Feedback Loops	3	4	5+

## 8. QA Severity Framework

Not all QA findings carry equal weight. This framework ensures critical issues block publication while minor items are tracked without derailing timelines.

Severity	Definition	Action
<b>P1 — Blocker</b>	Accessibility failures, broken functionality, incorrect content, security issues	Must fix before proceeding. Blocks publication.
<b>P2 — Must Fix</b>	Minor device rendering, non-critical content corrections, minor visual inconsistencies	Logged with deadline. Can proceed to next phase.
<b>P3 — Improvement</b>	Design refinements, optimization suggestions, future enhancement ideas	Logged for retrospective. Does not block.

### How QA Severity Interacts with Feedback Loops

When QA returns the ticket to the Designer, the severity tier determines what happens next:

- P1 found: Work stops. Designer fixes all P1 items. Full re-submission to QA. No downstream steps until resolved.
- P2 found: Work continues to next phase. P2 items are logged with a deadline. Designer addresses them in parallel or during feedback implementation.
- P3 found: Noted for the post-launch retrospective. No action required during the current production cycle.

For Scenario C, P1 findings related to the embed (scroll conflicts, CSP failures, performance degradation) require both the Designer and Platform team to fix together, as changes may need AEM staging re-deployment.

## 9. Feedback Protocol

Unstructured feedback is the most common cause of timeline delays. This protocol protects both quality and delivery speed.

### Rules of Engagement

1. All feedback is submitted in a single consolidated document — not scattered across email, Slack, and meetings.
2. One designated stakeholder contact resolves conflicting feedback before submission.
3. 48-hour review window from the time the asset is shared.
4. Maximum two feedback rounds. Additional rounds require escalation and timeline renegotiation.
5. Feedback is categorized: content correction, design adjustment, or new requirement.

### Feedback Categories & Impact

Category	Example	Impact
<b>Content Correction</b>	Typo, wrong data, incorrect attribution	Designer fixes. No re-validation unless extensive.
<b>Design Adjustment</b>	Color change, layout tweak, image swap	Designer fixes. QA re-checks affected area.
<b>New Requirement</b>	Add section, change navigation, add form	Change request. Timeline impact assessed. May restart SEO/Analytics/QA.

### Feedback Loop Behavior by Scenario

The feedback loops become more complex as the scenario complexity increases:

- Scenario A: Feedback affects one platform (Foleon only). Loops are simple: Designer fixes, specialist re-validates if needed.
- Scenario B: Feedback may affect one or both platforms. Changes to the AEM landing page or form require Platform involvement. Cross-platform journey must be re-tested after any change.
- Scenario C: Feedback affecting the embed requires both Designer and Platform to coordinate. Changes may require AEM staging re-deployment, adding 1–2 days per loop.

## 10. Post-Launch & Continuous Improvement

### 10.1 Monitoring (First 72 Hours)

- Analytics: confirm expected traffic and event tracking is flowing correctly
- Page performance across devices (load time, interaction responsiveness)
- Any user-reported or stakeholder-reported issues
- SEO indexing status for non-gated content
- Embed stability and behavior (Scenario C)

### 10.2 Rollback Plan

Every project must have a defined rollback procedure before go-live:

Scenario	Rollback Approach
<b>A: Foleon Only</b>	Unpublish the Foleon asset. Simple and immediate.
<b>B: Foleon + AEM</b>	Define sequence for both assets. AEM page may need update or removal.
<b>C: Embedded</b>	Replace embed with static placeholder. May require AEM re-deploy. Plan interim solution.

### 10.3 Retrospective

Within one week of go-live, the project team holds a 30-minute retrospective covering: what worked well, what caused delays or rework, and what should change in the process or checklists. Findings update the blueprint, checklists, and templates.

### 10.4 Versioning

For recurring assets (annual reports, updated campaigns), maintain a version log: what changed, when, who approved, and a link to the Wrike project. This ensures traceability across iterations.

## 11. Next Steps

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The following actions are required to move from this blueprint to operational readiness:

1. Validate this blueprint with the broader COE team and key stakeholders.
  2. Conduct working sessions to refine timeline estimates per scenario and step.
  3. Develop the RACI matrix assigning ownership at every phase.
  4. Formalize the accessibility checklist from existing draft documentation.
  5. Create Folio templates encoding CX and brand standards (based on GTT and Cyber Catalyst learnings).
  6. Complete the Adobe Analytics migration and implement platform-wide tracking.
  7. Document technical constraints (embed limitations, CSP, reverse proxy) into a living reference.
  8. Pilot the full process with the next scheduled interactive report to validate and refine.
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