



## IT Service Intelligence at work:

***“Evident’s products, in concert with our existing resources, helped us build a more efficient and effective relationship with our business partners—all in an effort to optimize applications, minimize consumption, and better manage growth.”***

*- Bobby Lie, SVP, Fidelity Investments*

### Corporate Overview

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Fidelity Investments is one of the world’s largest providers of financial services, with custodied assets of \$2.0 trillion, including managed assets of \$1.1 trillion as of November 30, 2004. The company reinvests a substantial portion of its revenues each year back into technology to deliver new products and services for their clients. They are consistently recognized by industry surveys and publications for providing some of the highest levels of customer support.

For over half a century, Fidelity Investments has grown and evolved through innovation and continual improvement, into a trusted leader in financial services. At the company’s core is the simple mission -- to act always in the best interests of shareholders and clients.

Fidelity has always used technology solutions to drive efficiencies in their businesses, reduce operating costs, and enhance the customer experience. Several years ago, Fidelity’s Enterprise Telecommunications team began investigating the way IT was delivered, supported and the associated costs allocated to the various business units they support.

## Initiative

As a recognized leader in using IT as a competitive advantage, Fidelity appreciated the need to financially benchmark and to accurately allocate the costs involved in delivering these services via its shared infrastructure. A key requirement to this initiative was the ability to collect, correlate, analyze, and report on global IT traffic patterns – and more importantly, assess the impact of these usage patterns on the quality of IT service delivery and the associated costs.

The broader goal, of course, was to provide the highest level of service most efficiently, allowing IT to remain focused on new initiatives that will support business growth and support the evolving needs of its clients. Specifically, Fidelity was looking to strengthen its understanding of:

- Which IT resources are used by which business units
- How much of, and *when*, these resources are consumed
- What this consumption costs to deliver, and how to more effectively allocate these costs.

## Solution

The team was led by Bobby Lie, the Senior Vice President of Telecom Engineering, Planning and Technology at

Fidelity Investments. Evident Software's IT Service Intelligence solution was selected to meter IT consumption, profile network and application usage across the enterprise, and more effectively allocate the associated costs to Fidelity's user groups.

Evident helped Fidelity build on its existing network monitoring tools - in particular, its extensive RMON2 deployment – to gather the necessary usage data to more effectively apply usage-based billing charges to Fidelity's many business units. Lie's team provided comprehensive reports to the business unit managers, including total usage, usage by application, daily and weekly usage patterns, and "top talkers". This data helped to strengthen the partnership between IT and Business, as they shared a common goal to cut consumption and costs where possible.

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***"We strengthened our application development efforts about writing programs that made more effective use of bandwidth."***

***- Bobby Lie, SVP***

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The Evident application is now implemented at numerous locations across the enterprise to meter IT usage and apply accurate usage charges from



## Success At a Glance

### Company

- Financial Services
- 30,000+ employees
- Managed assets of \$1.1T

### Challenge

- Institute usage-based cost allocations
- Curb significant growth in IT demand
- Partner with business managers to reduce IT costs

### Solution

- Implementation by Fidelity and Evident
- 90,000 endpoints metered for global measurement of IT usage
- Custom portal for reporting

### Results

- More effectively manage the growth in network traffic
- Reduce costs by almost one third
- Accurate usage-based billing
- Strengthened partnership between IT and Business
- Improved business unit satisfaction with the Telecom services organization

Fidelity's existing network infrastructure. Over 90,000 endpoints are currently being metered for IT consumption, profiling 80+ business units' usage. Armed with this intelligence, Fidelity is able to:

- Transform IT from a cost center to a value center. Business unit leaders now have hard facts about IT usage and costs, so they can see tangible value for what they are spending.
- Enhance the way new applications are developed and deployed, using network resources more efficiently, with improved service quality.
- Improve user satisfaction and establish a new level of partnership between IT and Business leaders.
- Make well-informed decisions about capacity planning. IT is able to support more services and users, with the same IT infrastructure.

## Results

As the solution was deployed and began metering and rating IT usage, Fidelity's IT group rolled out the usage-based billing to their internal users. Further more, Fidelity identified and optimized applications, configurations, and network topologies to make hardware and software run more efficiently. For instance, changing one of its backup

configurations, and changing the location of a few key servers, helped Fidelity reduce network traffic and costs. These improvements have also reduced the need to buy more bandwidth and IT infrastructure to support the business.

Evident has brought on-going savings by modifying user behavior, helping to reduce consumption, and optimizing future application development and deployment at Fidelity.

To help the business units focus on applications with the biggest payback, the Telecom organization publishes a list of 100 "top talkers" every month for each business unit. This list helps both the IT and business unit people to identify application behavior anomalies and opportunities for actions to reduce the network resources consumed.

"We strengthened our application development efforts about writing programs that made more effective use of bandwidth," said Lie. Fidelity was able to more effectively manage the growth

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***Evident has brought on-going savings by modifying user behavior, helping to reduce consumption and optimizing future application development.***

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in network traffic and actually reduce costs by almost one third.

According to Lie, "Evident's products, in concert with our existing resources, helped us build a more efficient and effective relationship with our business partners—all in an effort to optimize applications, minimize consumption, and better manage growth"

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## What's Next

The Telecom team is now using Evident Enterprise with a custom portal for reporting, which was developed in conjunction with Evident's professional services team. Fidelity is also exploring ways to leverage the metering capability of Evident Enterprise to uncover further opportunities to optimize their IT infrastructure, by identifying unknown assets and profiling utilization of servers and applications.

## Why Evident?

Fidelity completed an extensive evaluation and a successful pilot of Evident's solution. They selected Evident Enterprise as their worldwide solution to provide:

**Metering:** IT usage metering to benchmark IT consumption across business units.

**Billing:** Usage-based billing to accurately charge users for their consumption.

Evident's selection was based on several key differentiators, including:

**Scalability:** Evident Enterprise was the only solution able to manage the size and traffic volumes of Fidelity's vast network.

**Cost Modeling:** Evident Enterprise allowed Fidelity to apply fair and equitable cost-allocations to the cost centers for the IT services consumed.

**Accuracy:** Evident's solution was able to capture more data than other tested solutions. This enabled Fidelity to meter, rate and report on more information, more accurately, better pinpointing application and network optimization opportunities.

**Improved Capacity Planning:** Application profiling by location provided insight into service delivery, so Fidelity could right-size bandwidth to different locations instead of over-provisioning capacity to all locations.

**Integration:** Evident's solution allowed Fidelity to leverage existing hardware and network infrastructure, capturing data already collected by RMON2 devices.

**Reporting:** Granular and multi-dimensional reports were significantly more beneficial for the end user. This included the ability to report by business unit – including division, department, and cost center – and by location. Anomaly reports also provided insight for capacity planning and greater operational control.

Taken together, Evident's solution provided Fidelity an ability to deliver intelligence on global IT usage, its associated costs, and the resulting business value for their users.

## About Evident Software

Evident Software's IT Service Intelligence platform drives IT value. Our software makes IT usage, costs and their business drivers evident, so our clients can manage IT as an investment and our partners can optimize service delivery. Evident's global reach and patented technology is helping some of the world's largest organizations, including IBM, Fidelity Investments, and British Telecommunications, fuel innovation by optimizing their infrastructure, right-sizing and accurately accounting for IT spend. For more information, visit us on the web at [www.evidentsoftware.com](http://www.evidentsoftware.com).