

## CASE STUDY



# Enhancing the Customer Experience: Fidelity® Discovers the Value of Brix Networks' Service Assurance and Performance Verification Solutions

## INDUSTRY

Financial Services

## ORGANIZATION

Fidelity Investments

## BUSINESS PROBLEM

Fidelity was looking for additional ways to enhance its process of measuring the performance characteristics of its various IP applications, and ultimately enhance the overall experience of its customers.

## BRIX SOLUTION

### HARDWARE:

Brix 100™ Verifiers and  
Brix 1000™ Verifiers

### SOFTWARE:

BrixWorx™ Central Site  
Software System

## KEY BENEFITS

The Brix System measures application performance characteristics, plus allows Fidelity's network operations personnel to test and verify their IP services with proactive notification of corresponding changes in service levels.

Individual and institutional investors around the world look to Fidelity Investments® (www.fidelity.com) to help them achieve their financial goals. As a global leader in financial services, Fidelity has introduced many of the innovations that are standards in the industry today. At the heart of Fidelity's success is a commitment to outstanding customer service—leveraging cutting-edge technologies to deliver new products and services that can help meet the evolving needs of its customers.

In today's competitive financial services marketplace, success hinges on the firm's ability to provide its customers, and the Fidelity professionals who serve them, with access to the financial information, tools, and services they need to make informed investment decisions. This reality has made the performance verification of Fidelity's managed Internet Protocol (IP) network an issue of strategic importance.

"As investors get more technically savvy and their needs evolve, we must have the network performance to meet their expectations," says James H. Davis, III, senior vice president, global network operations, Fidelity Investments Systems Company. "The network-based tools we use at our more than 85 Fidelity Investor Centers around the country are important to providing the highest levels of service to customers."

## Looking For Additional Ways

Keeping tabs on latency and a myriad of other key service assurance and network performance metrics has always been important. "Fidelity has continuously looked for new ways to more efficiently

and effectively measure the overall response time of the network that determines the user experience," states Davis. "With an expanding technology infrastructure designed to support a customer base of more than 18 million individuals and institutions, Fidelity was looking for additional ways to enhance its process of measuring the performance characteristics of our various applications—and ultimately enhance the overall Fidelity customer experience."

*"After we installed the Brix equipment, we immediately saw the benefits."*

That's when Fidelity turned to Brix Networks (www.brixnet.com) of Chelmsford, Mass., a provider of real-time, Internet service assurance and performance measurement solutions.

"As we began to evaluate the Brix verification solution, we soon became very interested in using it in our own network," Davis says, noting he and several others from Fidelity formed a project team to test the Brix System. The initial pilot program consisted of Brix 100 Verifiers, hardware appliances that were deployed in five Fidelity Investor Centers which are linked to Fidelity via a managed service provider WAN.

## Success From The Start

"The Brix offering allowed us to strengthen how we monitor the overall operation and quality of our IP applications and services. After we installed the Brix equipment, we immediately saw the benefits," recalls

Davis. "In the case of one Investor Center, the BrixWorx console identified that latency had unexpectedly increased over the weekend. We were able to trace it down and catch it before the Investor Center or any customers were impacted. That really solidified the value of the Brix System for us."

Based on this successful pilot, Fidelity is installing additional Brix 100 Verifiers across their Investor Centers, plus Brix 1000 Verifiers at each of Fidelity's three Data Centers. The highly scalable BrixWorx software system, providing a full host of reporting capabilities, centralized administration, and service level agreement (SLA) provisioning, is located at one of Fidelity's Data Centers. According to Davis, the rollout of the Brix deployment has been "transparent."

*"...and the Brix System is a versatile tool that provides us with real-time, accurate, network measurements."*

"We have a third party install the Brix Verifiers, light them up, and go. It's been very easy," he says, noting each Verifier appliance is automatically discovered and configured by the central site BrixWorx server. "We don't have to fly someone around the country to install and configure them, which obviously saves us time and money."

## Versatile Tool With Many Uses

Initially, Fidelity is using the Brix System to measure UDP and TCP latency and traceroutes—plus application performance characteristics—for the Fidelity Investor Centers. But Davis says the Brix System is also being considered for other applications across the Fidelity complex.

"The health of the network and its related services and applications play an important role in how Fidelity services and supports its customers," concludes Davis, "and the Brix System is a versatile tool that provides us with real-time, accurate, network measurements. It also allows us to test and verify our IP services with proactive notification of corresponding changes in service levels."

## ABOUT FIDELITY INVESTMENTS

Fidelity Investments is one of the world's largest providers of financial services, with custodied assets of \$1.4 trillion, including managed assets of \$776.0 billion, as of August 31, 2002. Fidelity offers investment management, retirement planning, brokerage, human resources, and benefits outsourcing services to 18 million individuals and institutions, as well as through 5,500 financial intermediaries. The firm is the largest mutual fund company in the United States, the No. 1 provider of workplace retirement savings plans, one of the largest mutual fund supermarkets, and a leading online brokerage firm. For more information about Fidelity Investments, visit [www.fidelity.com](http://www.fidelity.com).

## ABOUT BRIX NETWORKS

Founded in July 1999, Brix Networks develops and markets real-time service assurance and performance management solutions that verify the quality of advanced, Internet Protocol-based services, such as Voice over Internet Protocol (VoIP), Virtual Private Networks (VPNs), Web-hosted business applications, and streaming media. The company's offerings allow carriers, service providers, large enterprises, and government agencies to build, operate, and assure their IP networks and services by providing proactive, end-to-end, service level management (SLM) and SLA verification.



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