

Fidelity Investments offers Financial Planning and Advice, Retirement Plans, Wealth Management Services, Trading and Brokerage services, and a wide range of other financial services. Their diverse businesses and independence give them insight into the entire market and the stability needed to think and act for the long term as they deliver value to clients.



Financial Services
Peloton Managed Services

Business Challenge

- **Complex Support Requirements** - Fidelity's investment and real estate divisions rely on Hyperion Essbase and complex SQL integrations with their Investment Management applications for management reporting purposes
- **Need for Continuous Support and Enhancements** - Ongoing maintenance and a steady flow of system enhancements requires deep functional and technical expertise

Solutions

- **Peloton Managed Services** - Fidelity partnered with Peloton to manage ongoing support and enhancement needs for its Management Reporting environments
- **Functional and Technical Support** - Both ongoing maintenance and enhancement services are managed through a dedicated Managed Services team of technical, process, and functional experts, focused on ongoing education, training, and hands-on support
- **Pro-active Management** - Ongoing support for month-end close, triage of complex issues, and identification and execution of solution enhancements

Impact

- **Reliability and Flexibility** - Fidelity's Management Reporting environment now not only runs consistently, it remains in an ongoing state of improvement to meet the business users' ever-changing needs
- **Continued Learning** - Access to Peloton's expert resources provides training to the internal support team, leveraging external perspectives and knowledge
- **Lower Cost of Ownership** - Total cost of ownership and maintenance have decreased considerably, as enhancements and improvements are introduced as needed over time in a consistent and holistic fashion