

## CASE STUDY

# Fidelity Investments

## Speeds and Controls Change Management with a Single Click

### Industry

Financial

### Challenge

An increasingly dispersed development team grappled with complex, time-intensive rollouts and a lack of process and controls for simultaneous releases

### Results

- Automated workflows with point-and-click distribution
- Accelerated project delivery and reduced errors
- Successfully deployed multiple releases

### Products

- Rocket® Aldon Lifecycle Manager (IBM i Edition)
- Rocket® Aldon Deployment Manager

### Application

- Software Change Management

## Company

Fidelity Investments is the world's largest independent fund management organization, with more than \$680 billion in assets under management. Founded in 1946, the company spans nine countries across North America, Europe, Asia, and Australia. A major factor in the firm's success is its long-held belief that developing and using the latest and most sophisticated technology at all levels enables it to fulfill business objectives and customer expectations. Since purchasing its first computer in 1965, Fidelity has maintained its commitment to exploring and harnessing innovation to benefit the people it serves.

## Challenge

Fidelity's development group was continually expanding and becoming increasingly dispersed to keep up with the firm's growing application needs. This evolving organization created new complexities for maintaining effective collaboration, coordination, and control of development across distributed systems and teams. The number of test and production boxes the organization used further compounded the situation. Rollouts were becoming more complicated and consuming greater amounts of development time and resources.

Adele Ebbage, senior systems manager at Fidelity Investments in the United Kingdom, headed up the group that was responsible for the company's change management solutions. "Given our multi-national scope, you're always going to have a situation where you've got multiple software releases progressing through the development lifecycle at the same time."

The need for synchronization became all too apparent. Ebbage noted, "There were so many developers working on the same applications that a source code control tool became essential."



## Solution

The Fidelity Investments change management group formally commenced a search for a solution that would give them the ability to automate the deployment of multiple software distributions simultaneously. To be effective, the solution would need to run seamlessly with the remote systems they already had in place, and would have to allow their developers to continue to work with their preferred tools. After an extensive evaluation process, the team selected Rocket® Aldon Lifecycle Manager (IBM i Edition) as their product of record.

## Results

Since its implementation, Fidelity Investments has been relying on Aldon Lifecycle Manager (LMi) to maintain the company's IBM i environment and manage software distribution from its "host" IBM i to seven remote IBM i machines. LMi brought real-time control to the organization and its business processes, making it possible to streamline the entire change lifecycle.

Ebbage describes Rocket Application Lifecycle Management (ALM) products as "extremely robust." She cites the product's ability to perform "multiple distributions across different IBM i machines, and automatically populate multiple data sets with new and updated file formats" as her favorite features.

Ease of use and speed were also critical factors in the selection of Rocket. "The ability to distribute software to four or five IBM i machines at the click of a button is definitely a huge benefit," Ebbage explains.

Fidelity's change management group uses Rocket to help synchronize developers' efforts, automating everything from task assignment, to approval gathering, to moving updated code from development through testing and on to production. Distributed teams working on multiple releases gain ready access to the information they need at any point in time. LMi custom dashboards make it possible to easily track the progress of changes, the status of promotions and deployments, and the size and scope of the change backlog.

Commenting on support, Ebbage notes, "The only time I have called upon technical support is during an upgrade of Rocket Lifecycle Manager, or when we've been doing an operating system or machine upgrade. Rocket technical support consultants have consistently risen to the occasion, providing Fidelity with the answers we needed to leverage technology on our customers' behalf."

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Adele Ebbage  
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