

**“Qualica’s UEM solution gives us real time visibility into what our client’s experience when they use our online channel – which translates into their experience of our brand.”**

Head: Online Channel, Large Investment Management Company

## Large Investment Management House deploys Performance Monitoring

### SYNOPSIS

Qualica’s client, a large investment management company, focuses their investment philosophy on delivering superior investment performance to its clients. Their Online team needs to ensure that client experiences in the Online Channel match the performance standards and culture that the company is renowned for. Qualica’s User Experience Monitoring (UEM) solution provides them with this valuable insight into the customers’ online experiences.

### CUSTOMER PROFILE

The client grew from a small sole proprietorship in 1973 to become the largest privately owned and independent asset manager in Southern Africa. Its purpose is to help investors build wealth over the long term. Their clients include individuals, retirement funds, insurers, trusts, companies, independent brokers and foundations investing in Southern Africa. The client provides an online channel to investors enabling them to view and manage their investments and conduct research.

### CHALLENGE

If you’re going to run a Web site in the 21st century, availability and performance are fundamental. “Google has set the benchmark,” says the client’s head of Online Channel. “Corporate Web sites have to meet the criteria of being available, fast and responsive.”

The client believes that the online channel is particularly appropriate for the financial services sector and will in future be the definitive channel. This is borne out by the uptake in the use of the client’s Web sites and the growth of email over telephone calls to the firm’s call centre. The client views the Web as perfect for their sector, which offers no physical product, as it provides a way for clients to actually see the services on offer by logging into their online accounts. And because it regards its Web site as such a key channel, they require a holistic understanding of how its clients are experiencing the online channel.

“Without a good monitoring solution in place there is no robust way to gain user information,” says the client. Until two years ago, they used a US developed client monitoring solution, but found its services expensive, relatively inflexible and not able to meet their monitoring requirements.

### SOLUTION

The client required comprehensive and multifaceted monitoring of its clients’ experiences. After extensive research, they selected Qualica’s User Experience Monitoring (UEM) solution due to its ability to meet their business and technology monitoring requirements.

“Our objective was to gain greater visibility into performance and obtain a view of what kind of service we were getting from our IT operations team which runs the technology,” explains the client.

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Multiple scripts, representative of the most common user paths through the different Web sites, are deployed on probes across different geographical locations and connectivity. Frequency of monitoring varies to achieve the different objectives; hourly runs to measure application performance and every five minutes to monitor application availability. All monitoring scripts are active tests performed in real time.

### RESULTS

The major benefits have been significantly improved visibility and understanding of its customers’ experiences backed by detailed performance metrics, cost efficiencies (as a result of Qualica’s Rand based pricing) and the ability to objectively measure service level agreements within its IT team and of its 3<sup>rd</sup> party service providers.

“By giving our clients an excellent Web experience, we enable them to manage their investments in real time,” says the client. “This gives them the locus of control and they benefit from the immediacy of real time information.”

The primary function of Qualica’s tool is to monitor what clients’ actually experience – which translates into their experience of the brand. Performance must reflect the corporate brand and standard of investment services.

“Originally we wanted to test the Web site every minute, but then realised we could make use of UEM’s notification engine for alerting us with any quality problems,” says the client. “We therefore now use email and sms notifications to identify if there are issues - according to our pre-set thresholds, enabling us to resolve them before our clients phone in to tell us about them.”

The client uses UEM to monitor all its online sites, including the public Web site, password-protected member Web site and the tools available to selected clients. “It provides us, at a click, with the monitoring information we need to know in real time,” says the client. “This immediacy is very important for us, especially during busy periods.”

“It is good to see South Africa producing world class technology,” concludes the client. “Having Qualica in the same time zone and using the same language means we can have open, robust conversations with them. We find them responsive in turning around issues and making enhancements.”