

Morningstar

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*Lazaro Fernandez,
IT Operations Manager,
Morningstar*

Impact Highlights:

- Maintain high service levels by monitoring Web site performance and enabling root cause analysis of any online problems
- Optimize performance of the Web site design
- Improve Web site hosting location decisions
- Support sales efforts to institutional customers in the U.S. and abroad by documenting adherence to service level agreements (SLAs)

Company

Morningstar, Inc. is a leading provider of independent investment research in the United States and in major international markets. The company offers an extensive line of Internet, software, and print-based products and services for individuals, financial advisors, and institutions. Morningstar provides data on more than 250,000 investment offerings, including stocks, mutual funds, and similar vehicles. The company has operations in 16 countries and minority ownership positions in companies based in three other countries.

Challenge: Monitor Web Site Performance from the Customers' Perspective

In 1999, Morningstar began the redesign of its investment research Web site for individual investors, Morningstar.com. Morningstar subsequently began offering online portfolio management tools on a co-branded basis to various

institutions for use by their customers. The company also launched Advisor Workstation, a Web-based financial planning platform used by financial advisors in the U.S., Canada, London, and parts of Europe.

From the beginning, Morningstar wanted to be able to monitor its sites' performance not only internally, but also from a customer perspective, as well as to troubleshoot the root cause of any problems so it could resolve issues quickly. Said Lazaro Fernandez, IT Operations Manager, "We were (and are) very serious about our presence on the Web and we wanted to make sure we monitored our site both internally and externally."

As it began serving institutional customers, Morningstar also needed a solution that would enable it to verify that its site performance adhered to its SLAs.

The Solution: Keynote's Application Perspective and Transaction Perspective

Morningstar has used versions of Keynote Application Perspective and



About Keynote

Keynote Systems (NASDAQ "KEYN") is the global test and measurement company for mobile communications and online business performance.

As an independent and trusted third-party, Keynote provides IT and marketing executives with an unbiased view into their Internet services from around the world. For over a decade, we have been providing measurement data and testing capabilities that allow companies to understand and improve their customer's online and mobile experience.

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Keynote Transaction Perspective ever since to measure site performance from a customer perspective. Today, Keynote Application Perspective measures the Morningstar retail investment research site's performance from 10 geographical locations throughout the United States, as well as from five European locations. It also helps Morningstar diagnose the root cause of any problems, for example, to determine whether the cause is a third-party ad or if it came from Morningstar's network. Morningstar employs Keynote's Application Perspective and Transaction Perspective when documenting adherence to SLAs for its institutional customers.

Results

Using Keynote's Application Perspective and Transaction Perspective, Morningstar successfully monitors performance of its retail, institutional, and advisor services from a customer perspective and analyzes the cause of any problems, thereby maintaining a high-level of performance for customers.

Morningstar employed Keynote Application Perspective to help with the redesign of its retail site. Explained Lazaro, "Keynote makes performance benchmarking results publicly available for the Yahoo and Google financial portals, which compete with our retail site. When we redesigned our site a few years back, we compared our performance with those sites and found that their financial portals were faster. As a result, we changed our design to include smaller pages so we could load our

pages more quickly and compare favorably with our competitors."

In addition, Morningstar used these solutions to optimize its hosting decisions. Said Lazaro, "We have several data centers worldwide. Disaster recovery and business continuity are two important factors that we consider when determining where to locate our hosting sites. At the same time, we need to maintain high levels of performance. We use Keynote performance testing to help us balance those factors when planning our hosting locations."

Keynote's Application Perspective and Transaction Perspective have also proved to help in the sales process when Morningstar approaches institutions or financial advisors about using its online portfolio management and analytical tools. With these Keynote tools, Morningstar has been able to demonstrate adherence to SLAs. Said Lazaro, "We use the results as auditable third-party verification that we're conforming to our SLAs. Having this ability is a selling point for our institutional customers."

As Morningstar offices in Europe and other international locations increasingly expand their operations, they are using Keynote Application Perspective to assist with these efforts. Lazaro commented, "To thrive internationally, we need to have performance benchmarks. As a result, our international operations are coming onboard and increasingly using Keynote."

In addition to ensuring high levels of site performance Lazaro says Keynote has also provided excellent support, reliability, ease of use and data integrity.

