

## Case Study



# BUILDING A DATA-RICH, USER-FRIENDLY SITE

When Motley Fool Asset Management (MFAM) set out to enhance their shareholders' web experience, they turned to Excella. Using Agile practices, Excella leveraged Python/Django on a cloud-hosted infrastructure to deliver an interactive website that matched MFAM's corporate values: straightforward, data-rich, customer-centric, and built for the long-term.

The result? A completely revamped digital presence that satisfies the needs of individual shareholders and financial professionals, saves MFAM staff hours of manual data entry per week, and serves as a client tool on par with MFAM's high-quality funds.



## Creating a Site That Works for the Foolish

Motley Fool Asset Management is a boutique, shareholder-centric, asset management firm established in 2009 by the financial-services company, The Motley Fool. To be compliant with regulators, MFAM needed a web presence separate from their parent. They knew that they wanted to include information on their mutual funds, as well as host the insightful content and analysis that Motley Fool is known for. The challenge they faced? Precisely what to build and how.

Together, MFAM and Excella established requirements that would cater to MFAM shareholders who needed to purchase funds, track performance and holdings, and download applications—yet also have the unique content and transparency they expected from a Motley Fool subsidiary.



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## Transparent and User-Focused

It was clear that MFAM's shareholder-centric philosophy should extend to their online presence, so the site is interactive, user-friendly, and data-rich. The back-end is integrated with Morningstar data for quotes and financial information, and is entirely automated, eliminating the need for any manual updates by staff. MFAM writers travel all over the world researching trends and companies, producing insightful articles that differentiate the site. MFAM is able to readily manage that content and messaging in-house. Interactive shareholder calls are accessible through the site via streaming video.

The entire site supports MFAM's desire for transparency. For example, rather than posting the top 10 mutual fund holdings mandated by the SEC, MFAM schedules a monthly release of the full lists of holdings that comprise each of their three funds. Excella automated the release process, decreasing previously manual staff efforts.

Another Fool Funds philosophy that influenced the site was "invest for the long-term." Excella built the cloud-hosted structure so that it is scalable, depending on traffic. Customers don't get bogged down when traffic increases, and MFAM doesn't pay more than necessary when site visits are down.



*Excella didn't just give us what we asked for; they gave us what we needed. The back-end programming and strong data capture helps us more readily manage the content—these were game changers.*

– Peter Jacobstein, MFAM President



AGILE | DATA | DIGITAL | MODERNIZATION

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