



Informatica™



Intelligent Disruptors: Meet the Experts Behind Customer 360 Initiatives

Five leaders transform how they engage with customers

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Bringing the Customer Front and Center

At this point there can be little doubt—it takes great customer data to deliver great customer experiences in a strategic, scalable, repeatable way.

The most successful companies don't just say they're becoming more customer-centric—they know that walking the talk requires accurate, actionable insights about their customers. So, they do whatever it takes to develop a single view of their customers and transform their customer experience.

More specifically, these companies have ambitious leaders in key positions who are willing to tackle internal inertia and massive complexity to make sure everyone has the right data to make possible what never existed before.



To us, these people are Intelligent Disruptors

We interviewed five transformative leaders from five ambitious companies to find out how they planned, managed, and implemented successful customer 360 initiatives. Our conversations covered a lot of the best practice and insight needed for these kinds of initiatives:

- Why it's important to set a big vision, but start small (and how to do it)
- Why C-level buy-in and strategic alignment matter
- How to measure and prove business value
- Getting IT and business collaboration right
- The impact of re-imagined data management on customer experience

But more than anything else these individuals demonstrate that, across industries and continents, with the right support, technology, partners, and great data you can do some pretty amazing things.



FASTWEB's Data-Driven Customer Experience Machine

How FASTWEB's "Man of Data" fueled the company's data-driven digital transformation with a 360-degree customer view



FASTWEB's Initiative in Brief

The challenge:

To reach half the population in Italy by 2020 with its fibre optic infrastructure and reduce churn, Italian telecommunications giant FASTWEB had to move from a contract-centric view of its data to a customer-centric view.



The initiative:

An Enterprise Data Hub that uses Informatica MDM to ensure that stakeholders and applications, including sales, marketing and customer care, have certified and high quality information.

The impact:

After achieving an extensive increase in the quality of customer data, FASTWEB is well on its way to increasing the effectiveness of its customer operations, employee productivity, and Net Promoter Scores, while reducing customer churn.



Meet the Intelligent Disruptor:

Nicola Salvemini

As FASTWEB's Senior Manager for IT Architecture, Nicola Salvemini led the planning and development of the company's Enterprise Data Hub.

Having joined FASTWEB "when we had zero customers," Nicola is now responsible for all things data, including business intelligence—a job that's earned him the informal title "Man of Data."

**Italian telecommunications giant
FASTWEB has some audacious
goals. With over two million
customers today, the plan is to reach
half the population in Italy by 2020.**

These aren't just hollow promises either—the company is already planning two billion euros worth of investments in innovation and infrastructure over the next four years.

This is a company that's serious about winning in a highly competitive market. And it's doing everything it can to deliver the customer experience needed to get there—starting with a strategic approach to managing its data assets.

"We have specific goals around reducing churn, managing our Net Promoter Score, and reducing the number of systems in our architecture—and we're meeting these goals with our Enterprise Data Hub and master data management (MDM)," says Nicola Salvemini, FASTWEB's senior manager for IT architecture.

Nicola is responsible for the Enterprise Data Hub—an ambitious customer 360 initiative to manage and certify all of FASTWEB's customer data so Customer Operations can "better respond to customer requests in a timely manner."

It's a job that's seen him tackling FASTWEB's toughest data problems for the last four years. And it's why his CIO dubbed him FASTWEB's "Man of Data."



Focusing on customers, not contracts

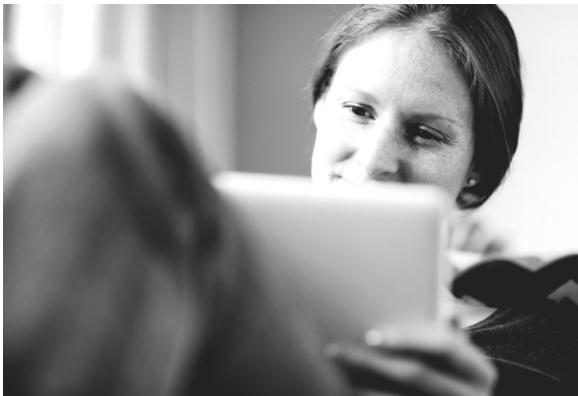
The first release of FASTWEB's customer 360 initiative was a customer service application that relied on the company's CRM application and three different order management systems.

"But the information in the order management systems was about contracts, not customers. So we had to attach the customer as a person," explains Nicola.

That added a layer of complexity—the same person could have three or four different contracts. A contract-centric view could only give the Customer Operations team a fragmented view of the truth.

Most companies struggle to confront these kinds of data problems. But FASTWEB isn't like most companies.

"We asked the question: 'how are we going to get certified data?'" he says.



That led to two crucial decisions.

"We started introducing master data management tools and processes to merge all the information coming from different systems," says Nicola.

"And we built our business data model, a conceptual model of our data," he adds before emphasizing:

"Not because we wanted IT to see that data. It was a business data model—the model of data that runs our business and could be used by business people."

Nicola's team achieved an extensive increase in the quality of customer data from unique systems in the first two months of operation.

"After that we started the great revolution—our digital transformation. We started to expand our business data model by adding domains for orders, commercial assets, billing, and claims," he explains.

"In fact, we get the order data in real time with change data capture," he adds.

So whenever someone from Customer Operations goes into an application like Salesforce, they have an instant view of the current "Customer Administrative Position," which includes a list of the latest invoices sent to the customer, the status of the invoices, the balance of the payments, and other key administrative indicators.

Nicola's team achieved an extensive increase in the quality of customer data from unique systems in the first two months of operation.



Why FASTWEB's “Man of Data” Chose Informatica MDM



"We were looking for an MDM solution that made it easy to build, easy to implement rules, easy for people on the business side to check rules, and easy for data stewards to make changes to those rules.

"But we also wanted a tool that was easy to maintain. I think for developers, Informatica tools are really nice because it's all based on mappings. So it's very easy.

"Informatica MDM had all these characteristics."

Nicola Salvemini, Senior Manager
for IT Architecture, FASTWEB

“The second big change will be when we expand with big data. Our marketers are thinking of employing a data scientist, so I have to prepare the data for them.”

Expanding the customer 360 view to marketing

Not one to slow down, Nicola and his team are building their next big customer 360 release—a marketing database.

“Now, we’re also considering “leads”—all the people we know—people we’ve sent information to, people who’ve filled in forms online, people who’ve called us for information...” says Nicola.

That’s a very different challenge that FASTWEB is characteristically ambitious about.

“Our objective is to catch all the interactions people have away from FASTWEB in our marketing database, on top of data analytics.”

“The second big change will be when we expand with big data. Our marketers are thinking of employing a data scientist, so I have to prepare the data for them.”



The centrality of “intelligent” data: metadata and governance

Having started by solving basic data quality issues, Nicola’s team quickly realized the significant impact of great data on their customers’ experience.

“This is one of those things that now, is clear. We realized that data is the center of an IT architecture,” Nicola says.

“The data is the petrol of the process. It’s the fuel that drives the engine of a company.”

But for FASTWEB’s “refinery” to manage all its data in a centralized and scalable way, Nicola and his team have to be able to manage their metadata (the information that describes their data—where it came from and what it means).

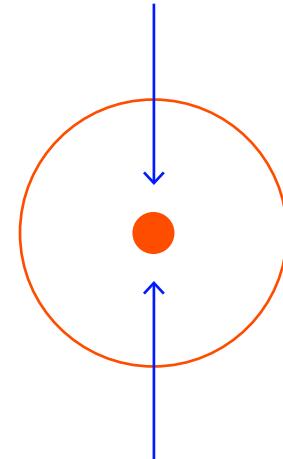
“Our goal is to have intelligent data. Or, from my point of view, not-so-stupid data,” says Nicola.

“So we use MDM, Business Glossary, and Metadata Manager, that includes data lineage, to maintain consistency between our data, and our business data model,” he explains.

In fact, as his team gears up for big data, he sees metadata becoming an increasingly strategic enabler.

“The data lake is stupid on its own. You have to run processes to extract information that can then be used for data science. If data scientists ran on the raw data, they’d make mistakes,” says Nicola.

A big lesson from FASTWEB’s success is that it takes a solid foundation of governance and great metadata to do what Nicola and his team have done.



“The data is the petrol of the process. It’s the fuel that drives the engine of a company.”





"My role is to deal with the data ingestion and the data preparation. The sexy work will be for the data scientists. IT people don't do sexy work," he says.

The good news is that if, like Nicola's team, you're smart about it, governance doesn't need to be a labor-intensive effort.

"Right now, we've only got four, five people involved in governance. So we chose to implement as many automated rules as we could.

"We thought it was a good compromise between quality and effort, because the main goal is to have the right quality of data to run the business. No more, no less."

"We call it business IT."

At FASTWEB, IT works iteratively with the business to deliver what they need.

"Once we got the data from the source systems, we'd look at the data with the business-side analysts who understand MDM rules. If it was no good, we'd scratch it and restart," Nicola explains.

"This was another big lesson we learned. Today, we're doing the same process with the prospect data. We've joined people from the business and IT in a digital transformation department. We call it Business IT."

“This is about the data. The question isn’t ‘why are you doing this?’ It’s ‘how can we make it easier to do this?’”

The business value of better customer data

Leaders of customer 360 initiatives naturally understand how important a sensible, repeatable approach to improving customer data really is. But they also have to have conversations with people who don’t.

Nicola has been there too.

“Two years ago, people would say, ‘what is the business value of the Enterprise Data Hub?’ What I’d say is ‘if you don’t have the hub, you won’t have data you can trust. You won’t have data in Salesforce, or data on the customer’s current status, or data in all our apps.’

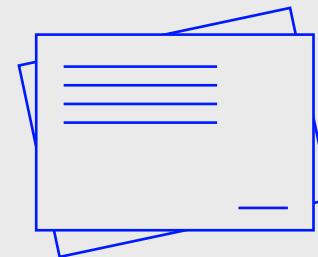
“Once I explained that, people stopped asking.

“This is about the data. The question isn’t ‘why are you doing this?’ It’s ‘how can we make it easier to do this?’”

Considering the way Nicola and his team have continually delivered on FASTWEB’s ambitious goals, it’s fair to say those are words worth living by.

“Just Enough” Data Governance

Read our eBook [“Just Enough Data Governance”](#) to find out how to govern your data in an effective but sustainable way.



Put Data at the Center, Put the Customer in Control

How PostNL uses its “Data Roundabout”
to give its B2B and B2C customers smarter
online experiences



PostNL's Initiative in Brief

The challenge:

Dutch logistics company PostNL is transforming itself for new digital realities after one of its customers, an orchid farmer, approached it to shrink his supply chain.

The initiative:

"The Data Roundabout," a platform powered by Informatica MDM to organize the data moving across PostNL's massive cloud-based networks.

The impact:

Not only did PostNL increase its customers' margins, the company is also entering international e-commerce and experimenting with Internet of Things retail experiences.



Meet the Intelligent Disruptor:

Mario Suykerbuyk

In his role as Managing Director of Data Solutions, Mario Suykerbuyk is responsible for "everything that has to do with data inside PostNL."

Having spent more than 15 years involved in digital transformations, Mario thrives in transformational initiatives, setting up innovation programs and driving culture change.



PostNL is the Netherlands' universal postal service, providing logistical and e-commerce services for the distribution of mail, parcels, gold, pharmaceuticals, and even flowers across Europe.

Or as Mario Suykerbuyk, PostNL's managing director of Data Solutions puts it; "we move things from A to B."

But having delivered the Netherlands' mail for over 200 years, PostNL is currently in the process of transforming its operations for new digital realities.

"The products are changing, the services are changing—we just want to make sure our customers are in control during the whole process," he explains.

To do that, Mario's team changed the way PostNL strategically manages its data.



“As a logistical company, we were always focused on addresses. We changed that when we implemented the Informatica platform. Now we’re focused on the customer.”



“The Data Roundabout”

“A lot of companies place the customer in the center. I always say, ‘Put data in the center’ because without the right data at the right time, in the right format, your customer can’t make the best choice. When you place data in the center, you put the customer in control,” says Mario.

Mario’s team built “The Data Roundabout,” a flexible, scalable master data management platform that delivers data to customers, partners and employees in real time. That’s helped them focus on what really matters.

“As a logistical company, we were always focused on addresses. We changed that when we implemented the Informatica platform. Now we’re focused on the customer.”

“Before, we had an address where somebody was living, and now we have somebody living at an address; so if you want to have your parcel delivered to where you live, that’s okay. But if you’re on holiday, we also can deliver it there,” he says.



Strategically, PostNL's biggest asset is the scale and number of delivery networks it manages. For customers to get what they want, when they want it, PostNL needs to be able to use its data to choose the most appropriate service and price for any given customer.

For instance, if the customer is ordering pharmaceuticals from a doctor, PostNL needs to make sure the drug has a tamper-proof, temperature-controlled journey.

That calls for a more strategic approach to data management.

"We have to connect all our networks into our data solution using Informatica MDM, and then provide that information to our customers. It could be in an app so the end consumer can see where their parcel is and maybe reroute it.

"But we also want to provide that information directly to marketplaces like eBay and Amazon so that when you order a product from one of our B2B customers, it also gets sent through the right network," explains Mario.

Mario's team didn't settle for just making that data available—they prioritized making it available in real time.





"Consumer needs are changing. It must be real time. For some products, delivering in 24 hours isn't enough—we need to deliver in just three hours or 30 minutes. So we have to adjust our services," he says.

Another important facet of PostNL's platform is that it allows the company to expand its services and become a larger part of the global e-commerce economy.

"What we see is that it's cheaper to buy an iPhone cable in Singapore and send it to your home in the Netherlands, than it is to go to your local retail store, and buy it there. The Data Roundabout allows us to distribute those kinds of products through our systems too," he says.

That's a big shift. And as Mario and his team have demonstrated, it takes a robust platform for data management to make it work.



The Importance of Managing Data in the Cloud



When it comes to technology, PostNL is way ahead of the curve.

"We're a cloud-only company. We decided four years ago to move everything to the cloud and we're almost there," explains Mario.

PostNL uses Microsoft Azure, Amazon Web Services, and a private cloud depending on its needs. Mario is realistic about the potential complexity that comes with a cloud-only approach.

"If you have legacy systems, you can migrate them to the cloud. That's not a problem. The main challenge is to have the integration on top of the different clouds, because you don't have one cloud."

"And when you go to real-time data services, you're also partnering with a lot of other companies. And they have their clouds. So we have to integrate them all. And we have to watch out for things like security and latency," he says.

In order to manage that complexity, Mario made two important choices.

"We took the best of breed in that area—Informatica MDM—because it's providing tools to control the complexity. And secondly, we implemented an API management layer, including a security layer where we can see which data is moving and where. If there's something that needs attention, we can deal with it," explains Mario.

Transforming the customer experience... for orchids

Most customer-centricity data management initiatives are about laying foundations that allow you to listen more closely to your customers.

But interestingly, PostNL's initiative started because they listened closely to one of their customers—an orchid farmer named Peter.

"The reason we started this initiative was that roughly one year ago, one of our customers contacted us to ask how we sort our parcels. He was an orchid farmer who found his supply chain being overrun by middlemen.

"He wondered why he couldn't just sell his orchids directly to the end consumer. He knew he needed a logistical solution so he came to us—because he needed data integration for visibility into his supply chain," explains Mario.

Mario and his team realized that Peter could just as easily deliver the orchids directly to end consumers through PostNL's regular parcel network, with specialized packaging. They worked together to identify the data they needed from their delivery network and then connected it using Informatica MDM.

As a result, they could now ensure that when a consumer buys an orchid online, the order goes directly to Peter, before the orchid is delivered using PostNL's regular parcel network.

"If you look at the total supply chain, there were a lot of parties involved. But if you connect the grower directly to the end consumer, you only need a transportation layer. You can cut out a lot of steps. That means margin," he says.

By improving the margins, PostNL managed to lower the price of orchids for consumers while increasing the amount Peter earned per orchid. Remarkably, Mario's team didn't stop there.

"What's important when you sell flowers is that you see them first—especially for orchids," says Mario.

Working with Peter, Mario's team set up a camera and RFID chips under each orchid so that customers could see exactly which flower they were purchasing when they looked at Peter's product information on eBay and Amazon.

"Now the end-consumer can actually see what they're buying. It's not a stock photo," he says.

"It's amazing to see what we've been able to change in just six months."



Moving forward: an internet of things vision

It's a testament to Mario and his team's ambition that they've been able to transform a 200-year-old logistics company into the global, data-driven, customer-centric e-commerce operator PostNL that has become.

Today, PostNL's platform extends well beyond the market for orchids alone.

"We're integrating more and more logistical data domains. We started with seven, and we will end up with 45. That's mainly about connecting producers directly to the end consumers. You can do that with every product."

"We're now researching how we can make the Internet of Things network together with manufacturers of things like washing machines. So in the future, the end consumer doesn't even have to push a button when they run out of washing powder. Their smart washing machine can just order automatically. And we can just deliver it via the same network, using Informatica to manage the data," explains Mario.

It's a bold move from an ambitious team at a transformative company—but Mario is clear about what this all comes down to.

"In the end, you have to provide a better, more trustworthy customer journey. You do that with data."

"In the end, you have to provide a better, more trustworthy customer journey. You do that with data."



"We'll start
at the front."

How Bradley Corporation and Murdoch's
Ranch & Home Supply transformed their product
information for better customer experiences



Bradley Corporation's Initiative in Brief

The challenge:

A 95-year old manufacturer of commercial plumbing fixtures realized its customers and partners needed richer product information than its ERP system could manage.

The initiative:

"Starting at the front," the company used Informatica MDM-Product 360 to create, manage, and deliver more robust and complete product characteristics for its customers across its 200,000 products.

The impact:

Within three months, Bradley Corporation created an efficient process for collecting vital product data from domain experts. The process has also enabled the company to gain new prospects and improve the customer experience for existing clients.



Meet the Intelligent Disruptor: Connie Beuche

Since joining Bradley Corporation as an engineer 18 years ago, Connie Beuche has risen through the ranks and today serves as Bradley's enterprise product data manager, leading Bradley's initiative to adopt product information management.

Murdoch's Ranch & Home Supply's Initiative in Brief

The challenge:

Western lifestyle brand Murdoch's Ranch & Home Supply had a channel-centric view of its customers, and a siloed approach to product information management.

The initiative:

Using Informatica MDM-Product 360, Murdoch's can now expose a single view of more than 100,000 SKUs (stock-keeping units) in inventory to employees and across its 30 stores and e-commerce site.

The impact:

Customers from across the five U.S. states that Murdoch's operates in are using the improved product data to change the way they buy from Murdoch's stores and website, helping Murdoch's to more rapidly move its inventory.



Meet the Intelligent Disruptor:

Lindsey Hildreth

Lindsey joined Murdoch's when they were making their first big steps towards e-commerce. As eStore Merchandising SEO specialist, she's been a big part of the team supporting product information management and she's played a pivotal role in shaping the way consumers experience Murdoch's online store.



Bradley Corporation is a 95-year old, leading manufacturer of commercial plumbing fixtures and washroom accessories. Murdoch's Ranch & Home Supply is a multi-brand retailer that celebrates a western state of mind.

On the face of it, the two companies couldn't be more different.

But a few years ago, when it became clear just how important e-commerce, search engine optimization (SEO), and detailed product data was going to be to their respective business models, both companies started massive digital transformation initiatives.

And both started at the front—by transforming their customer-facing applications with a smarter approach to product information management (PIM).



This is about transforming the customer experience

With 30 brick and mortar stores spread across five states in the Rocky Mountain Region, Murdoch's core customer continues to be the traditional in-store shopper. However, there is evidence that suggests that customers also want a digital experience, in particular, being able to know what products are available. That's where it helped to have a centralized system for product information management (PIM).

"Our team uses PIM for our e-commerce site, Google analytics, we use it in-store—our employees need information and PIM enhances it so we can make it available to everyone who needs it," explains Lindsey Hildreth, Murdoch's eStore Merchandising SEO specialist.

In fact, the e-merchandising team is continually re-evaluating how much product information they share to deliver deep product knowledge that is found in the store associates.

"We want to make sure we're giving our customers the right information, rather than giving them all the details," says Lindsey.



"Really without PIM we wouldn't have been able to do what we're doing today. The data behind our e-commerce operation is exponentially important to how it works."

Brice Fenger, Product Manager, Murdoch's Ranch & Home

Choosing Informatica MDM-Product 360: a single version of truth

Operationally, the most compelling benefit of PIM is the fact that it centrally integrates and manages detailed product data across disparate teams, channels, and systems.

Before Informatica MDM-Product 360, the team at Bradley Corporation tried to use their ERP's "part master" to centralize their product data.

"Ten or 15 fields will fit into an ERP's part master—volume metrics, price, and what not. That was easy. But then, you had descriptive information. Is it yellow, and what's the thread size, and does it meet California Prop 65 code requirement..." explains Connie Beuche, Bradley Corporation's enterprise product data manager.

It takes domain experts to answer those questions. But it takes a system like Informatica MDM-Product 360 to manage the data from all those different sources.

"We were looking for a single source of truth that we wouldn't have to maintain elsewhere," she says.

Over at Murdoch's, the small team of e-merchandisers and copywriters use product data in the course of their daily activities. The team needs to make sure they can focus on the higher value activities that develop the brand and enrich customers' experiences.

"Now we can focus on customizing the data to make sure the copy's useful, ranks higher for SEO purposes and helps our customers online," says Lindsey.



The importance of strong corporate support

The most successful customer initiatives are the ones that are sponsored from the top. And Connie is quick to credit the singular view of a sales vice-president with the success of Bradley Corporation's initiative.

That support empowered Connie to have a focused team of five, full-time team mates—across product management, marketing, customer service, sales, and IT—who were all co-located in a dedicated “war room.”

“If you take people and just have them do a project on the side, it can go on forever. So, having a solid team really kept us on track to cross the finish line,” she explains.

Having an engaged sponsor even gave Connie's team the support they needed for a project extension and re-scoping once they decided to scrap their original plan and implement Informatica MDM-Product 360. Most important, it gave them the buy-in they needed when the time came to appoint data stewards and create a governance council.

“With Informatica, we felt like we found a true partner who provided sound technical guidance and a local integrator partner. Since our purchase, we actively promote Informatica for its high-quality help desk support, engaged product management, and a robust road map.”

Connie Beuche, Enterprise Product Data Manager, Bradley Corporation



Measuring success: specific goals, specific metrics

Successful initiatives also prove their value with clear and measurable KPIs.

For Bradley Corporation, Connie's team prioritized two metrics for governance and reporting. The first is a simple data quality metric to make sure everyone fills in the new fields they're meant to fill in. Measuring fill rates ensured widespread adoption of the new process—and crucially, better data quality.

The second metric counts the number of data exports by sales channel—an indicator that the sales team is using the improved product data to show existing accounts that they can benefit from better product information too.

"We believed that every customer that adopted it would grow their business—and they have. So we went to our sales people and explained it to them. 'I'm measuring you on giving me prospective customers,'" says Connie.

At Murdoch's, the e-merchandising team is dealing with more than 100,000 SKUs (stock-keeping units) from 1,500 vendors and 30 brick and mortar stores. The objective was equally clear:

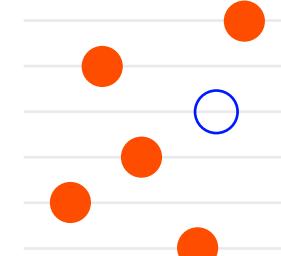
"We were trying to get a huge number of products online. We couldn't have done that with the old ERP system and maintained accurate, relevant information at the same time," says Lindsey.

Here, Informatica MDM-Product 360 made sense because it gave the e-merchandising team a fast, scalable approach to collecting and improving their product information.

Equally, it also gave them the ability to exercise far more control over how they move their inventory—a crucial capability in retail.

"We don't want to oversell certain brands without the stores knowing what we've sold. We also want to sell at full price. PIM gives the data we need to make sure this is happening," Lindsey says.

"If we say we have it, we want our customers to trust that we have it. So we're exporting inventory data from PIM three times a week."



Directly impacting the customer experience

At Murdoch's, a simple survey was conducted to understand the influence the web had on in-store customer behavior. Data showed that nearly every associate has had a customer ask for product they found on their website.

"A lot of our customers now look up online and then come to buy in-store. But we want to go even further. As a growing company, we're going to look to PIM to do more and streamline even more processes for everyone in our team," says Lindsey.

"Our goal now is to simplify both the customer's experience as well as our own team's experience. The easier we can make it for everyone inside the easier we can make it for our customers.

"We really just want to put a smile on our customers' faces."

At Bradley Corporation, the results have been equally impressive. In fact, not only did Connie's team drastically improve their own product information, they have made a massive impact on their customers as well.

"When I hear our customers are happy because we've been able to make their world right, then I'm great. These are the things that keep you going every day."

Connie Beuche, Enterprise Product Data Manager, Bradley Corporation



How SulAmérica Centralized its View of the Customer

The story behind SulAmérica's journey toward
a unified view of its customers—across ten
different lines of business



SulAmérica Seguros' Initiative in Brief

The challenge:

Brazil's largest independent insurance provider, SulAmérica Seguros knew it needed to move away from a product-centric perspective. But with ten different lines of business, the company's view of the customer wasn't just fractured, it was broken.



The initiative:

Using Informatica MDM to unify customer data across 16 different systems, the company deconstructed and then reconstructed its view of the customer, creating a centralized customer data hub and data lake.

The impact:

A single view of the customer helps SulAmérica see who its most valuable customers are—across business units. The data lake powers self-service analytics that help SulAmérica understand customers and prepare for new business models.



Meet the Intelligent Disruptor:

José Guilherme

As SulAmérica's Business Intelligence Manager, José Guilherme has been integral to the deployment of the company's first centralized customer hub as well as the development of a cutting-edge data lake for self-service analytics.

Or as José puts it, "My mission is to give the business all the information it needs to improve."

"We're changing the way this industry looks at data," says José Guilherme, business intelligence manager at SulAmérica—a 120-year-old company and the largest independent insurance provider in Brazil.

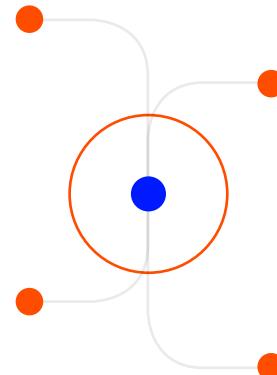
Four years ago, SulAmérica Seguros' executive team made the decision to move the company from a product-centric perspective to a customer-centric one.

In order to make that move real, the company invested the time and energy it needed to build a centralized customer data hub—one that cut across its ten different lines of business.

"We had to think about the profitability of the customer and not the policies for each of our products," explains José, whose team successfully led the initiative to create a single view of the customer using Informatica MDM.

"We couldn't see the fact that a customer that's very profitable in one product, for example, isn't a very good customer in another. Combining this information means we can treat this customer like a VIP across business units," he says.

But before SulAmérica could leverage this centralized view of the customer, José and his team were going to have to build it.



Reconstructing the customer view with MDM

SulAmérica sells insurance policies covering everything from automotive and asset management to retirement and homeowner's insurance. When SulAmérica's customer 360 initiative first started, José was confronting some serious structural and organizational issues.

"Our business units are relatively independent of each other. Which, of course, creates silos. For instance, they had different ways of structuring their customer data," says José.

That meant José and his team needed to "deconstruct" all the data coming from different business units down to its "primitive state" so they could clean, de-duplicate, and govern it.

This involved:

- Reconciling multiple records of the same customer
- Matching disparate data structures and models
- Creating rules to differentiate between different customer identifiers like social security numbers and employer IDs





Then, using Informatica MDM and Address Verification (a part of Informatica Data as a Service), José and his team started the process of “reconstructing” their view of the customer.

Considering the length and complexity of Portuguese names, José and his team created hundreds of rules and cross-references to identify potential distortions of customer names and postal addresses.

Once they'd automated these rules and processes in MDM, José's team could start to push the “golden records” of every customer back to the company's new operational CRM application, Salesforce, in a reliable and repeatable way.

That was important because José understood that all those business units would want to work in their own ways and with systems that were familiar to them.

“The business units are going to continue to be independent. But what we want is for them to consume our data. So when they change their customer records, those records are connected and aligned with the MDM hub, and they are getting the right data,” says José.

A unified view of the customer is only part of the battle. It only remains operationally valuable if you have the technology and processes in place to ensure it remains accurate over time while also improving and evolving as the business moves forward.

“Culture change is a real challenge.”

With initiatives as ambitious as SulAmérica's, it's common for the teams building the unified customer view to be questioned by people who used to “own” the old data when it lived in an operational silo.

“They have to understand that we're connecting data from 16 different systems. So we have to explain that the new information is the golden record,” says José.

But his team also made a smart move to educate anyone struggling with all the cultural change.

“Our strategy was to keep all the original information in the hub, as well. So we can compare the information that was processed and maintained in the golden record with the original information,” he explains.

That way, anyone who doubted the benefits of the new system could instantly see the difference José's team was making.



Self-service analytics: fueled by a single view of the customer

To generate even more value from the single view of the customer across business units, José and his team laid the foundations for self-service analytics that place that unified view in the hands of the business people who need it.

"We realized IT could no longer be the bottleneck," explains José.

"So we created a data lake. And we're bringing the latest data into the lake in near real time. So when something changes in any of our databases, the new information is available for our users in the data lake in just three hours. That used to take 45 days," he says.

As you'd expect, that unified view is going to impact SulAmérica's customer operations in both simple and meaningful ways.

"For customer service who have to send our customers messages, it's important they have the right phone numbers," says José.

"But it's also really important for sales. We expect the combination of the operational CRM, MDM, and analytics to make us much more accurate in our segmentation for example. And we're also going to be much more efficient in improving our KPIs for cross-sell, upsell, and churn."

Measuring the Success of Self-Service Analytics

José has a characteristically intelligent approach to making sure SulAmérica's self-service analytics initiative is meeting the right objectives.

"We're measuring the success of the project by the number of users putting this information into their daily routine. So for instance, we're measuring the number of panels they're creating in dashboards, or the amount of time they're saving in their daily routine.

"Their success is our success."



These are all essential activities for customer operations—which need better data to be improved. But SulAmérica's focus on faster, self-service analytics is actually about something a lot bigger.

"The world is changing. We have a concrete vision of a possible future where cars don't have drivers anymore. How does that change our business? Even in healthcare, now that we have wearables...how does that affect us? We have examples for each one of our products of how the world is changing.

"And we don't have years to deploy projects that answer these questions," says José.

"It isn't just about the data we need to sell more. It's about the data we need to understand our customers better and maybe even change our business models."

That's what this initiative is all about—zooming in on the customer in a way that companies haven't been able to before. So this 120-year-old company can keep evolving.

"After an executive meeting I heard someone say, 'After 120 years, we finally have a central hub for all our customers!'" says José.

That's the kind of progress it takes to change an industry.



"It isn't just about the data we need to sell more. It's about the data we need to understand our customers better and maybe even change our business models."

Learning from Successful Initiatives

At Informatica, we've helped companies of all sizes around the globe to make possible what never existed before. We provide with the technology, guidance, and services they need to successfully transform their companies around customer 360 initiatives.

And while no two initiatives are ever identical, one thing is clear—when you take a strategic approach to intelligent customer data management, you give everyone in your company the insights, tools, and data they need to redefine customer experience.

You make sure

- Your best people are focused on customers, not on contracts or addresses or products or channels or business unit silos.
- Your increasingly distributed collection of channels, platforms, and teams are united around a clean, consistent, and connected version of the truth.
- And you have the technology, relationships, and processes that evolve with you as your understanding of the customer—and as your customers—evolves.

This is about delivering tangible results like FASTWEB's data-driven customer experience machine, PostNL's customer-centric operations, Bradley Corporation and Murdoch's customer-centric product information, and SulAmérica Seguros's centralized view of the customer.

These initiatives require a well-defined strategy, cross-functional collaboration, and strong leadership. But in the end, they're invariably worth it.

Because it's only when leaders like you combine cutting-edge technology with a clear vision of what your customer experience should be that transformation becomes possible.

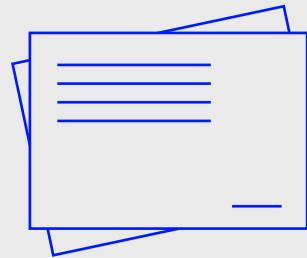
We hope you've learned from the Intelligent Disruptors we interviewed. And we hope you'll become one too.



Further Reading

Building a Business Case for Better Customer Data Management

You know how much better customer data management can improve your customer-facing operations. But you've still got to gain C-level buy-in for your initiative. [Read our guide](#) to proving the value of customer data management initiatives to find out how to start.



[DOWNLOAD NOW](#)

About Informatica

Digital transformation changes expectations: better service, faster delivery, with less cost. Businesses must transform to stay relevant and data holds the answers.

As the world's leader in Enterprise Cloud Data Management, we're prepared to help you intelligently lead—in any sector, category or niche. Informatica provides you with the foresight to become more agile, realize new growth opportunities or create new inventions. With 100 percent focus on everything data, we offer the versatility needed to succeed.

We invite you to explore all that Informatica has to offer—and unleash the power of data to drive your next intelligent disruption.

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