



Blum Capital Partners Streamlines SaaS Data Integration with Informatica Integration Pack for Salesforce

Blum Capital Partners L.P. is a San Francisco-based investment management firm specializing in strategic block and privately negotiated transactions initiated in the public market. They made a strategic decision to transition to a Salesforce CRM solution to give their investment professionals integrated, on-demand access to vital investment data.

“The Informatica Integration Pack provides the plumbing infrastructure for the application. Users don’t know it’s there, but without it the system would not function. I believe that the automatic population of data is key to the user adoption of any CRM system.”

— Rodric O’Connor
Chief Technology Officer
Blum Capital Partners

Challenge

To migrate critical data to the new Salesforce software as a service (SaaS) model, Blum Capital sought a package that could extract and move data from both Web and internal sources into the Salesforce system. They wanted a data integration solution that combined several advantages – easy configuration and management, high data quality and consistency, and licensing as a SaaS subscription.

Solution

Robust Platform

The Informatica Integration Pack for Salesforce proved ideal for the project. The Informatica Integration Pack for Salesforce (iPack) is a subscription-based bundle, combining the Informatica flagship, PowerCenter®, the leading enterprise data integration platform, and Informatica PowerExchange® for Salesforce, universal data access technology. The iPack bundle is purpose-built to simplify the tasks of migrating, replicating, cleansing, and synchronizing Salesforce data with on-premise business applications, databases, or master data hubs.

Speedy Implementation

Rodric O’Connor, chief technology officer at Blum Capital, assembled a small team of IT professionals. It took them only three weeks to configure the Informatica solution as an integration hub to access data from the two key sources—a Web-based financial intelligence service from Reuter’s and an internal holdings data application, Axyx from Advent Software.

The team quickly configured the plug-and-play technology to extract historical financial, revenue, balance sheet, cash flow, forecasting, and other information from Reuter’s XML-based data feeds and channel it to Salesforce.

The Integration Pack was easily configured to load into Salesforce only the Reuter’s data regarding companies of interest to Blum Capital; this improves performance and reduces stress on bandwidth. When Blum personnel add a new company in Salesforce, iPack recognizes the addition in real time and populates pre-built fields with Reuter’s data.

Results

The Informatica Integration Pack for Salesforce provides reliable behind-the-scenes data integration that enables Blum Capital to make the most of its new Salesforce system, said Mr. O'Connor, who was named one of *InfoWorld's* "25 Most Influential CTOs" in 2002.

High Data Quality. High User Confidence.

The system's reliability, combined with the high degree of data quality and consistency it provides, are important in driving user trust and adoption. "The Informatica Integration Pack provides the plumbing infrastructure for the application," Mr. O'Connor said. "Users don't know it's there, but without it the system would not function. I believe that the automatic population of data is key to the user adoption of any CRM system."

Rapid ROI

The three weeks it took to design and configure the system was four times faster than would have been possible with alternative hand-coding methods. The Informatica Integration Pack's codeless development environment and native connectivity with Salesforce helped to streamline the process.

Blum Capital is taking advantage of the extensibility and infrastructure integration capacity of Informatica technology as a key differentiator. As opposed to additional costs required with competing solutions, Informatica technology may be expanded at no additional expense.

"I wanted to have a product that we could use as our integration hub for all of our future integration needs," Mr. O'Connor said. "We needed a tool that was flexible enough to meet our current and future needs. Informatica provided that tool."

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