



FAST FACTS

BUSINESS INITIATIVES

- Accelerate successful merger outcome
- Increase operational efficiency
- Enhance business agility
- Improve customer service and retention

TECHNOLOGY STRATEGY

Implemented the Informatica Platform, based on Informatica PowerCenter® Real Time Edition™ and Informatica PowerExchange® to access, discover, cleanse, integrate, and deliver timely, trustworthy data to the extended enterprise to streamline merger activity, increase operational efficiency, and reduce costs

BNY Mellon Accelerates Post-Merger Business Growth with the Informatica Platform

Leading asset management and securities services company relies on Informatica technology to reduce risk of merger and to help clients manage their financial assets and succeed in the rapidly changing global marketplace

“Yes, the Informatica solution saves BNY Mellon money, but more importantly it allows us to use our intellectual property more effectively. Our developers, for example, aren’t sitting here writing code all day; they’re working faster, innovating, and focusing their cumulative knowledge on solving business problems.”

— Sateesh Prabakaran, Chief Architect, Bank of New York Mellon

Executive Summary

Great things happen at Number One, Wall Street. And we’re not just talking here about the world-class asset management, securities and treasury services, or wealth management. The headquarters of BNY Mellon is also home to an exceptional data integration strategy—one that has helped facilitate a highly successful banking merger and that continues to help BNY Mellon’s clients manage and move their financial assets and succeed in the rapidly changing global marketplace. One of the reasons for this success? The Informatica® Platform.

Global Asset Management and Securities Reach

BNY Mellon is no ordinary Wall Street player. This leading asset management and securities services company processes an average of \$1.5 trillion in global payments every day, holds \$21.8 trillion of assets under custody and administration, and has \$1.0 trillion in assets under management. Headquartered in New York, BNY Mellon operates across six continents in 36 countries and has 42,700 staff. Last year, *Global Finance* rated BNY Mellon the “Safest Bank in the U.S.”

BENEFITS

- Allowed bank to quickly realize business benefits of merger
- Reduced cost of data integration on Asset Servicing project by 50 percent
- Combined client base, with minimal customer interruption
- Enabled bank professionals to make faster, more accurate decisions
- Created an integrated information delivery platform for 30,000 global institutional clients of its Asset Servicing business
- Helped bank understand clients' needs more effectively
- Reduced costs across the global organization
- Enabled staff to innovate and focus cumulative knowledge on solving business problems

NUTS AND BOLTS

- Solution: Data integration to support business intelligence
- Products: Informatica PowerCenter Real Time Edition, High Availability Option™, and Informatica PowerExchange for DB2 on the mainframe and CDC
- Services: Informatica Professional Services
- Sources: Asset management, securities and treasury services, wealth management
- Targets: Business intelligence data warehouse and data marts

In 2006, Bank of New York and Mellon Financial Corporation announced that they would merge, creating the world's largest securities servicing and asset management firm. At the time, it was referred to as the "marriage of equals": two vast financial services organizations coming together to combine their respective strengths in securities trading and treasury services. But as any marriage guidance counselor will explain, successful marriages are all about sharing. In this instance, it was all about sharing data: rapidly integrating the data of the two merging banking organizations to more immediately realize synergies, achieve a higher rate of success, and introduce a reusable technology infrastructure to support subsequent mergers and acquisitions.

Sateesh Prabakaran is a chief architect at BNY Mellon. For him, the data integration challenge was driven entirely by the business goals. "Our aim was to harmonize, transform, and enrich the data from the two organizations—introducing a holistic, single view of information. To do that, we needed a unified platform which would connect all of our information and deliver accurate, shared, and trusted information throughout the business."

Consolidation of the Bank's Asset Servicing Data

Prior to the merger, the Informatica Platform had been used intermittently as a utility by developers. Now it was set to become BNY Mellon's key data integration asset: the core technology to streamline the consolidation of the bank's Asset Servicing data. "In the Asset Servicing domain, the Informatica Platform streamlined the merger integration between The Bank of New York and Mellon Financial Corporation," explains Prabakaran. "If we had continued down the hand-coded COBOL route and ignored the Informatica real-time integration solution, I have no doubt that it would have taken more effort and time to complete this high-visibility Asset Servicing solution. In comparison to other tools in the market, Informatica offered us the breadth of flexibility, rapid time-to-market development capability, and low total cost of ownership we needed for our industry-leading reporting system."

Following the development of a merged banking infrastructure, BNY Mellon has been working closely with Informatica Professional ServicesSM (IPS) to leverage the Informatica Platform and create an integrated information delivery platform for global institutional clients of its Asset Servicing business. BNY Mellon's Asset Servicing Workbench platform is used by clients 24x7 to access near real-time reports on custody holdings, foreign exchange transactions, and other investment activities through a single on-line portal. By standardizing on the Informatica Platform, BNY Mellon is streamlining and accelerating the extraction, transformation, and loading of complex data for the Workbench presentation layer by providing up-to-the-second information for thousands of accounts.

Employing advanced change data capture (CDC) techniques, Informatica technology integrates data across the bank's DB2 mainframe-based systems. Changes to data are continuously captured, as they occur, noninvasively from DB2 logs. Rather than the traditional method of accessing operational DB2 tables, the Informatica Platform delivers the requisite reliability, security, and performance for capturing, transforming, integrating, and delivering operational data in a highly available, right-time fashion.

Delivering a Unified View of \$21.8 Trillion of Assets Under Custody

In a wider context, the data connected via Informatica technology helps BNY Mellon understand its clients' needs and the solution delivers a complete view of the \$21.8 trillion of assets under custody. Moreover, the unified portal that the Informatica Platform provides helps 30,000 bank professionals such as brokers, dealers, and pension fund managers to make faster decisions based on an accurate, consolidated version of the truth. As Prabakaran acknowledges, "We can live with a short delay in data delivery for some services, but every service demands data accuracy. Our net asset calculation process can only be effective, for example, if the underlying data is trustworthy. That's the intrinsic value that the Informatica Platform delivers: confidence that the data we have is accurate and trusted."

Prabakaran also acknowledges that the Informatica Platform has enabled the bank to reduce costs through more effective decision making, the rationalization of systems, and a greater degree of agility. In fact, the Informatica Platform helped reduce the cost of data integration on the Asset Servicing project by 50 percent. But talk about cost savings ignores the latent value of the technology. "Yes, the Informatica solution saves BNY Mellon money, but more importantly it allows us to use our intellectual property more effectively. Our developers, for example, aren't sitting here writing code all day; they're working faster, innovating, and focusing their cumulative knowledge on solving business problems."

IPS has played a major role in the delivery of this data integration project. The team has worked closely with its BNY Mellon counterparts to bring the postmerger integration to fruition more quickly and more successfully. "The Professional Services team members are very smart people," says Prabakaran. "They got us productive very quickly and the quality of the knowledge transfer means we are largely self-reliant now. They understand the 'what', the 'how', and the 'why' of data integration. I characterize IPS as the critical bootstrap to take the Informatica solution portfolio to the next level of success."

As BNY Mellon illustrates, effective data integration is key to quickly realizing the business benefits of a merger or acquisition, when it most counts. BNY Mellon is leveraging the Informatica data integration platform to rapidly deliver data services to a combined client base, with minimal customer interruption. It is proving to be the ideal technology for driving postmerger efficiencies, business process consolidations, and customer loyalty in a flexible, rapid, and cost-effective manner. It can also seamlessly support future acquisitions.

Learn More

Learn more about the Informatica Platform. Visit us at www.informatica.com or call +1 650-385-5000 (1-800-653-3871 in the U.S.).

About Informatica

Informatica Corporation is the world's number one independent provider of data integration software. Organizations around the world gain a competitive advantage in today's global information economy with timely, relevant and trustworthy data for their top business imperatives. More than 4,100 enterprises worldwide rely on Informatica to access, integrate and trust their information assets held in the traditional enterprise, off premise and in the Cloud.



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