



# CA Technologies Targets, Attracts, and Retains Customers Worldwide More Effectively with Informatica

Business enablement team of leading IT management software and solutions company uses simple, cost-effective cloud integration service to create single, global view of thousands of opportunities.

## FAST FACTS

### BUSINESS INITIATIVES

- Attract and retain customers
- Improve sales management efficiency
- Accelerate decision making about sales, marketing, and service

### TECHNOLOGY STRATEGY

CA Technologies used the scalable, secure Informatica Platform, in this instance consisting of Informatica PowerCenter®, Informatica PowerExchange® for Salesforce CRM™, and Informatica Cloud Services to unify the different Salesforce CRM opportunities by account, and blend different products, services, education, and support offerings. This simple, productive service for business users includes an intuitive integration wizard, automated scheduling of jobs, data transformation through a drag-and-drop Web interface, and support for multiple Salesforce CRM objects to manage contacts and accounts.

“We completed the Salesforce CRM migration in one third of the time, decreasing the deployment time by three months, by using Informatica Cloud Services.”

— Andre Pimentel, Senior Director of Operations, CA Technologies

## Executive Summary

The problem at CA Technologies was real, high profile, and urgent. The leading IT management software and solutions company was using a single instance of cloud-based Salesforce CRM; however, multiple opportunities were being opened and managed against the same CA Technologies customer for the same deal. This meant the sales, services, support, and other lines of business each had its own view of the customer relationship. That resulted in multiple overlapping sales opportunities and diminished sales, marketing, and service effectiveness.

The company standardized on Informatica Cloud Services to integrate the different opportunities within Salesforce CRM into one unified global picture of every customer relationship. Completed three times more quickly than the hand-coding migration route and with four fewer staff members, these simple, productive, and secure services for business users enable CA Technologies to accurately target opportunities, increase sales effectiveness, and enhance customer service and support.

## BENEFITS

- With Informatica Cloud Services, completed the Salesforce CRM migration in one third of the time and used four fewer people
- Ensured CA Technologies had trusted operational data more quickly to target and manage sales/service opportunities
- Enabled the company to access and integrate cloud data easily and cost-effectively
- Fostered closer collaboration between lines of business
- Delivered a single view of the sales pipeline by account, and all products and offerings for a specific deal, for every CA Technologies customer worldwide
- Offered simple, productive services for business users
- Completed project on time and on budget supported by Informatica Professional Services

## NUTS AND BOLTS

- Solution: Cloud data integration
- Products: Informatica PowerCenter, Informatica PowerExchange for Salesforce CRM, and Informatica Cloud Services
- Services: Informatica Professional Services
- Sources: Multiple Salesforce CRM opportunities
- Target: Unified Salesforce CRM opportunities by account

## Delivering More Flexible IT Services

CA has a new name. When the IT management software and solutions company recently unveiled its new name—CA Technologies— it reflected a fresh determination to manage and secure IT environments and to deliver more flexible IT services to its customers. It also pointed to the company's future as a leader in delivering the solutions that will revolutionize the way IT powers business agility. Andre Pimentel has been putting that flexible IT services delivery and business agility into practice.

Pimentel is a senior director of operations at CA Technologies, and part of his role is business enablement through technology for the company's marketing, sales, services, and support organization. Working closely with the IT organization, he and his team are responsible for administering the company's Salesforce CRM software as a service (SaaS) environment. More than 5,000 CA Technologies users worldwide rely on this cloud computing platform to effectively manage the sales process, provide consistent and high-quality customer support, and drive other services, such as education and partner relationships.

The challenge for CA Technologies was that its Salesforce CRM system did not reflect what a typical customer sales opportunity might look like. Each of the contributing members of the sales team—sales, services, education, and support—had its own separate view of the opportunity. A deal could consist of a product sale and a professional services engagement, an education engagement, and then a support offering as well. The result was as many as five separate opportunities being tracked simultaneously—all of them tied to the same deal. This overlap impacted sales, marketing, and service effectiveness and made it harder for executives to see a true picture of the business situation.

## Creating a Single View of Every Opportunity

"Our aim was to track opportunities that mirrored the actual deal," explains Pimentel. "That meant creating a single view of every opportunity in Salesforce CRM across all the different lines of business. To achieve that we needed to merge our existing products and all these open disparate opportunities. We had cases where we had to collapse four, five, or six opportunities into one—integrating all the associated product, customer, partner, services, and other data. It was a huge task."

The dangers of inertia were real. For example, the timeline for a services engagement might be recorded against one set of milestones in one opportunity, whereas the education or customer support deliverables might be working to an altogether different deadline on a different opportunity but against the same account or deal. Equally, the sales team may record a deal value to be \$100,000, ignoring the fact that there is a separate services engagement to be accounted for. "We needed to gain a single version of the truth. With many different opportunities being tracked as part of the same pipeline, it was very difficult to rely on the data we were looking at and make reliable business decisions," says Pimentel. "We were using some manual data manipulation to reach a reliable picture of the sales, services, education, and support pipeline, but it was slow and prone to error."

One of the main reasons CA Technologies uses Salesforce CRM is for its flexibility—the cloud model adapts to change very quickly, it's cost effective, and it's very easy to use. Pimentel and team were looking for those same virtues in the data integration solution that would unify the Salesforce CRM environment. CA Technologies has been using the Informatica Platform for several years, most recently to integrate data between CA Technologies' previous contract system and its SAP enterprise resource planning (ERP) system.

“When it came to the Salesforce CRM migration program, no other vendor was on our radar. Based on the previous success with the Informatica Platform,” Pimentel says, “we were confident the Informatica cloud data integration solution would enable CA Technologies to access and integrate all the cloud data easily and cost-effectively. Salesforce.com themselves recommended we use Informatica Cloud Services.”

## A Single View of Every CA Technologies Customer Worldwide

CA Technologies has deployed the Informatica Platform, in this instance Informatica Cloud Services, to gain full value from its Salesforce CRM data. The scalable, secure “Salesforce to Salesforce” cloud integration solution migrated and merged data from the sales, services, education, and support opportunities three times quicker than conventional migration techniques, resulting in a single view of every CA Technologies pipeline worldwide. Accounts are now synchronized with products and offerings within a single sales opportunity, while allowing different milestones to be reflected for each aspect of the deal.

The business had made an urgent request for the Salesforce CRM data to be merged into a single, shared Salesforce opportunity. All the time the CA Technologies sales and services professionals were looking at fragmented data, opportunities were being overlooked, customers were receiving multiple, overlapping requests from different areas of the business, and company executives were struggling to maintain a trusted picture of the sales pipeline. Because Informatica Cloud Services offers simple, productive services for business users (the technology requires very little training to set up and administer), Pimentel's team along with the IT organization were able to complete the migration very quickly.

“We completed the Salesforce CRM migration in one third of the time, decreasing the deployment time by three months, by using Informatica Cloud Services. If we had dumped the data into SQL Server and created a series of hand-coded algorithms, the migration would probably have taken three months or more. In fact, we did it in one month, using four fewer people than the hand-coding route required,” Pimentel says. “This accelerated migration meant CA Technologies had trusted operational data more quickly to target and manage sales opportunities. That's good for revenues. It also fostered closer collaboration between each of the lines of business because they're all now sharing the same view of the data.”

## Knowledge, Support, and Professionalism

Informatica Professional Services<sup>SM</sup> supported CA Technologies during the migration, identifying which items of data would need to be included, then mapping those items from the old Salesforce CRM opportunity objects to the new ones. They also supported Pimentel's team and the IT organization in building the scripts within Informatica Cloud Services, connecting the two data sources, running through the migration steps, and looking out for any errors. "If it wasn't for Informatica Professional Services, we would have taken three months to complete the migration," Pimentel says. "Their knowledge, support, and professionalism were vital to completing the project on time and on budget, within the 30 days."

The relationship with Informatica is going from strength to strength. Moving forward, CA Technologies will continue to leverage the Informatica Platform for its data integration initiatives, using the proven and scalable technology to deliver powerful bidirectional data loading and extraction whenever necessary. Pimentel concludes, "Being so easy to use, Informatica Cloud Services is wildly popular. On the business side, we want to use it more too, because it delivers results so quickly and cost-effectively."

## Learn More

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

## About Informatica

Informatica Corporation (NASDAQ: INFA) 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 4,000 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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