



## Meeting the compliance deadline for Basel II through an enterprise-wide data quality initiative

### FAST FACTS

#### Business Challenge

- Drive growth by improving business flexibility and enhancing the customer experience
- Avoid cost and risk with increased business efficiency
- Improve decision making and compliance
- Improve information security and privacy

### TECHNOLOGY STRATEGY

Supply a single version of the truth across disparate business units

- Transition from legacy CRM and back-office systems to a hosted salesforce.com SaaS solution
- Lay a foundation for a master data “hub”

### INFORMATICA SOLUTION

Informatica Integration Pack for

Salesforce CRM

Informatica Professional Services

### BENEFITS

- Improved business efficiency and flexibility
- Improved abilities to serve customers
- 100% ROI in under 2 months
- Up to 40% lower TCO
- Rapid project completion, 7x faster

“With Informatica, we now have a long-term data integration strategy in terms of business efficiency and flexibility as well as improved abilities to serve customers. As a result, we can work more effectively with our customers for mutual business growth. The fundamental power of what Informatica gives us is consistency in our data combined with the dynamic and seamless integration of data that’s critical to our business.”

— Chris Lin, Vice President of Infrastructure and eCommerce, Ellie Mae, Inc.

Ellie Mae, Inc. is an award-winning provider of software and services for the mortgage industry, with solutions for mortgage brokers, bankers, and lenders. Since its founding in 1998, the California-based company has enjoyed rapid growth. More than 150,000 mortgage professionals use Ellie Mae’s Encompass Mortgage Management Solution, and about one-third of the nearly \$2 trillion in new mortgages originated each year in the U.S. are linked through its ePASS Network online transaction platform.

### The Challenge

An online business needs a strong foundation to survive and prosper. For Ellie Mae, Inc., a leading provider of software and services for the mortgage industry, that foundation includes scalable, high performance, and reliable application and data infrastructures that can seamlessly connect tens of thousands of mortgage brokers, bankers, and lenders.

As it grew rapidly over the past 10 years, Ellie Mae had deployed an array of disparate applications with various data formats to meet fast-changing business demands in the highly competitive mortgage industry. Like many companies, Ellie Mae had implemented standalone systems to meet immediate tactical IT needs and to capitalize on emerging market opportunities.

With market success and increasing numbers of customers came new products and services, each supported by discrete data and applications. Data volume and complexity mounted. Interdependencies among systems grew more complicated and difficult to manage with traditional manual programming approaches. The results were increased cost, risk, and delay. Ellie Mae's acquisition of two software companies, Contour and Genesis, further exacerbated the challenge.

To position itself for long-term and sustainable prosperity and market leadership, Ellie Mae embarked on initiatives designed to:

- Better align data and application resources with strategic growth objectives
- Implement a standardized data format across multiple systems
- Enhance customer-facing Web interfaces and systems
- Improve data exchange and data security with business partners
- Support new business initiatives with trusted, accurate information

## The Solution

Ellie Mae launched a broad, ongoing IT initiative to improve business flexibility and enhance the customer experience. They selected the Informatica Integration Pack (iPack) for Salesforce CRM and Informatica Professional Services (IPS) to begin overhauling its data integration infrastructure. The overarching business objectives were to harness enterprise data to drive revenue, improve customer service, strengthen data privacy and compliance, and streamline the delivery of products and services.

The first step was multi-phase data migration to a hosted salesforce.com CRM system from its core Pivotal CRM application. Over time, the Pivotal application had become a heavily customized "mini ERP" system, seeking to serve CRM, transaction activities, financial, invoicing, maintenance, and other back-office data. By moving from the legacy Pivotal system to Salesforce, Ellie Mae anticipated improved productivity, greater sales effectiveness, and reduced costs for customization.

Informatica iPack proved an optimal solution for the project. This powerful, "plug and play" data integration solution suite is comprised of the Informatica flagship PowerCenter platform, Informatica PowerExchange® for Salesforce CRM, as well as the Informatica OnDemand Data Replication and On Demand Data Quality Assessment Services. The software bundle offers native connectivity with Salesforce CRM, the popular software as a service (SaaS) system, and near-universal transformation of internal source data to support both one-time data migration and ongoing data synchronization. Since iPack is offered on a convenient and affordable subscription basis, the suite helps companies integrate and synchronize Salesforce data with their corporate IT environment without the need to invest in a comprehensive data integration architecture.

To assist with the project, Ellie Mae engaged Informatica Professional Services. A collaborative team of Ellie Mae and IPS technologists defined a data integration strategy, projected the timeline, and developed several integration processes with iPack.

The team implemented a PowerCenter-based framework that synchronizes data to Salesforce from Pivotal as well as integrating data from Great Plains financial applications and other systems. Then they designed, tested, and cleansed the Pivotal data. Finally they migrated the data from Pivotal to Salesforce. According to Chris Lin, Ellie Mae's vice president of infrastructure and ecommerce, it took them only nine days.

“Without Informatica Professional Services and the Informatica technology,” Mr. Lin estimated, “this part of the project would have easily been a one- or two-month project. The IPS team members are very, very professional and got the system up very quickly. At the same time, they provided training and knowledge transfer so our team got a good idea of how the system works in a very short period of time.”

## **IPS Engagement Equips Elle Mae with Skills for New Initiatives**

IPS expertise enabled Ellie Mae to avoid costly mistakes that might have impacted business performance, and they helped deal with duplicate and inconsistent data introduced from Ellie Mae’s acquisitions. The exercise was also valuable in enabling Ellie Mae to delete data related to companies that had gone out of business, improving business efficiency and reducing wasted effort.

“Having the Informatica Professional Services team on site was a tremendous value both in terms of time and helping us avoid mistakes,” Mr. Lin said. “It was one of the most effective projects I’ve ever been involved in.”

With IPS assistance, Ellie Mae gained hands-on knowledge of PowerCenter which served them well once they completed the migration of sales engagement and pre-sales activity data to Salesforce. “iPack is really easy to use and gives us a great deal of flexibility to handle disparities in data formats,” added Mr. Lin. As a simple but important example, he noted the ability to format data between in-house applications and Salesforce systems so that invoices print correctly.

In the second phase, Ellie Mae will use Informatica to migrate such core customer information as support tickets and service call tracking, allowing them to retire the Pivotal system. Mr. Lin expressed confidence that knowledge gained from the IPS engagement and iPack’s ease of use will accelerate that second phase.

## **A Single Master Data Hub to Improve Business Execution and Customer Service**

Also in the pipeline are plans to take advantage of the near-real-time capabilities of PowerCenter to increase the synchronization frequency of live data from internal systems to Salesforce. The acceleration from nightly to every 30 minutes or less will bring greater precision and timeliness to business processes and goes hand-in-hand with a related project to engineer a master data “hub” in which PowerCenter will play a key role.

“The next step of our data strategy is to build a master copy of the data and a data hub, a central place where we will manage all our master data,” Mr. Lin described the strategy. “That’s our next initiative in the quest towards having one version of the truth. That approach will allow us to tie together any number of disparate systems and retire legacy systems in a very cost-effective way. Informatica is at the center of that effort.”

In tandem, related projects are under way to simplify and enrich the customer experience by integrating sets of extranet portals and interfaces used by customers and partners, then aligning those with systems for invoicing, electronic document generation, and customer management. Informatica will help support a rigorous data privacy and security framework particularly important in the mortgage industry.

## The Results

### Short-Term ROI of 100 Percent; Lower TCO up to 40%

For the first phase of the Salesforce CRM data migration and synchronization project alone, Mr. Lin estimated that the combination of iPack and IPS yielded a 100 percent return on investment. Moreover, traditional manual programming would have amounted to a one-off, ad hoc effort that offered no further scalability. With component-based Informatica technology, Ellie Mae will realize sustained ROI for years to come through the ability to reuse components to build modular, highly scalable data integration infrastructures. The total cost of ownership is roughly 30 to 40 percent less than alternative solutions, estimated Mr. Lin.

### Project Completion Nearly 7x Faster with Informatica Professional Services

By engaging IPS, Ellie Mae went live with its initial Salesforce data migration and synchronization in just nine days—nearly seven times faster than the two months Mr. Lin estimated it would have taken with only internal resources. The IPS engagement paid out additional dividends, as well, with hands-on training and knowledge transfer that have given Ellie Mae developers expert insights into Informatica technology that improve productivity and turnaround time.

### Improved Business Efficiency and Customer Service to Drive Growth

With Informatica at the center of ambitious initiatives to integrate both data and application infrastructures more tightly, Ellie Mae is positioning itself to reap the business benefits achievable through data consistency and the dynamic, seamless integration of data. The benefits span virtually all aspects of Ellie Mae's operations—enriching the customer experience in a secure framework that meets data privacy and compliance requirements, improving visibility into internal key performance indicators, greatly reducing the cost and complexity inherent with disparate applications and data formats, and securing the ability to harness data quickly and reliably to meet strategic business objectives.



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