



HarbourVest Builds an Agile and Responsive Global Private Equity Investment Business with Informatica Cloud Services

HEADQUARTERS

Boston, MA

WEBSITE

www.harbourvest.com

FOUNDED

1982

INDUSTRY

Private equity

EMPLOYEES

230

“Informatica Cloud Services are the heartbeat of HarbourVest’s salesforce.com strategy. It was vital to our use of salesforce.com to have the Informatica cloud-based technology. Live in only three weeks, the Informatica Cloud Services integration solution allows our client relationship teams to maintain rewarding, long-term relationships with our global network of private equity clients.”

— Greg Mahoney, Business Analyst, arbourVest Partners, LLC

The Challenge

HarbourVest Partners, LLC invests in venture capital, buyout, mezzanine debt, and distressed debt through investments in funds, secondary purchases of assets, and direct investments in companies. An existing Equitrak accounting database was ideal as a source of data on investment clients and other influential parties, such as consultants, third-party administrators, and attorneys. However, it lacked the holistic customer view and rich sales functionality that HarbourVest needed to attract and retain investment clients for the long term. In response, the firm turned to salesforce.com. The challenge was to find a fast, cost-effective way of integrating the crucial Equitrak investor information into the Salesforce CRM application.

Specifically, HarbourVest needed a solution that would:

- Provide sales teams worldwide with a single, shared view of client relationships, including contact information, investment history, and recent activity
- Shrink the Equitrak/salesforce.com integration time to weeks, thereby enabling HarbourVest client relationship managers to become productive more quickly
- Ensure HarbourVest communicated with its clients with one voice, through their chosen communication channel
- Support the company’s rigorous compliance and data privacy strategy

The Solution

Working closely with Informatica® Professional ServicesSM, HarbourVest deployed the multitenant Informatica Cloud Services to synchronize its back-office investor client information with its salesforce.com sales management system. Powerful and proven, yet easy for nontechnical HarbourVest users to administer and manage, the Informatica cloud-based integration solution was developed and launched in only three weeks. The solution features an intuitive, easy-to-use data integration wizard and support for querying multiple salesforce.com objects, and it delivers automated scheduling of jobs that integrate over 25,000 rows of data between systems per day. HarbourVest chose Informatica Cloud Services based on a previous highly successful Informatica PowerCenter® on-premise data integration implementation within the IT organization and recommendations from salesforce.com.

Key benefits included:

- Enabled HarbourVest to increase sales effectiveness and business efficiency immediately following the 2009 economic downturn
- Ensured that sales teams deliver cohesive and compelling sales messages for improved client retention
- Increased knowledge sharing and communications across the global organization
- Supported stringent market regulations regarding compliance and data privacy
- Introduced up-to-the-minute, multichannel client view
- Provided fast, low-risk route to increase sales effectiveness and responsiveness

Learn More

Learn more about the Informatica Cloud. Visit us at www.informaticacloud.com or call +1 650-385-5000 (1-888 345 4639 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.

HIGHLIGHTS:

GOAL

Provide client relationship managers worldwide with single client view for increased sales effectiveness and long-term client retention

SOLUTIONS

- Informatica Cloud Services
- Salesforce CRM
- Equitrak accounting system

RESULTS

- Completed back-office Equitrak database and salesforce.com integration in only three weeks
- Increased sales effectiveness and business efficiency in aftermath of 2009 financial slump
- Improved client retention through single client view and increased client/market knowledge
- Increased knowledge sharing and communications across the global organization
- Introduced up-to-the-minute, multichannel client view
- Provided fast, low-risk route to integration with no dedicated hardware or software



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