



**KnowledgeBase  
Marketing®**

## KnowledgeBase Marketing Relies on Informatica Identity Resolution Technology to Identify Customers

### CHALLENGE

- High-precision, high-volume identity data search-and-match capabilities needed to create a master identity repository to improve the accuracy of a customer database

### SOLUTION

- Informatica identity resolution technology

### RESULTS

- Creates an accurate master identity repository by reducing the possibility that the same individual appears more than once
- Reduces IT maintenance costs and maximizes efficient use of technology
- Helps marketing company achieve operational excellence

“The matching engine from Informatica is the key component for migrating towards this master data management paradigm. By providing the means for generating unique identifiers while providing the high-precision matching, new records imported into the environment can be resolved against the master registry and quickly linked to all instances across the collection of supplied customer data.”

— Brian Camp, Senior Vice President, KnowledgeBase Marketing

### Creating a Business Model Based on Accurate Identity Data

KnowledgeBase Marketing (KBM) is a marketing data product compiler providing numerous products, including the AmeriLINK® National Consumer Database, that helps KBM's clients quantify market potential and target prospects who are likely to become high-value customers. The AmeriLINK database contains robust demographic, lifestyle, attitudinal, and hotline data and can be used for customer profiling, targeting responsive prospects, creating predictive models, and driving customer relationship management (CRM) programs.

KBM manages a set of customer databases for collecting and then distributing demographic data. This data is sourced from data suppliers and is ultimately combined into the information products used for campaigns and customer analytics. To provide high-quality products, the consumer name and address information must be consolidated into a single customer view, which is the sole source of truth used in compiling the AmeriLINK database.

KBM is strong in providing information in the senior health and insurance arenas. Because its client base targets older individuals who need to buy their own health insurance, KBM's data products, by necessity, must be of high quality where age information is relevant.

In essence, KBM must create a master identity repository that can accommodate many feeds of variant structure and quality, load data on a continuous basis, and provide assurance to its clients that the quality of the information can meet their expectations. While the repository supports applications dependent on the consolidated data, the absence of legacy operational systems

simplifies the master data management architecture and governance framework. To support the master repository, KBM has developed basic data models (depending on the business unit) for representing individual data, and external data feeds are transformed into the basic model in preparation for consolidation.

The real challenge: applying sophisticated identity resolution to the multiple data sets to reduce the possibility that the same individual appears more than once within the data set. KBM found a solution: Informatica® identity resolution technology (formerly known as SSA-NAME3)\* to handle high-volume, highly accurate identity data searches and matches.

## Building a Faster, Smarter, and Less Expensive Data Matching Engine

Matching and linking records is a core competency for KBM's business. The company has historically created its own matching algorithms to complement its focus on creating name and address data cleansing techniques. The goal in pursuing a commercial matching engine was to lower maintenance costs while increasing throughput on its mid-range platform. In addition, KBM wanted a solution with an application programming interface (API) that would enable direct embedding into the existing application infrastructure.

After evaluating a number of products, it became clear that the Informatica Identity Resolution technology satisfied the requirements as a best-of-breed matching engine, and its API also enabled KBM to embed the search-and-match capability directly into KBM's applications instead of using it as a standalone product. "When compared against the alternatives, [Informatica] clearly came out on top," says Brian Camp, Senior Vice President of KBM.

## Powering Master Data Management

KBM is evolving its applications toward a service-oriented architecture and an enterprise service bus so that all application components can be accessed as service points.

"Because matching and identification are critical to the customer data integration process, KBM is seeking to establish Informatica's technology as the core identity resolution service," explains Camp. "As part of a scalable, high-performance system to support a very large number of records, this matching service point will learn, based on the streams of processed records, how to better match customer identities more quickly, link them to master registry identifiers, and connect the data across multiple data sets simultaneously.

"The matching engine from Informatica is the key component for migrating towards this master data management paradigm," adds Camp. "By providing the means for generating unique identifiers while providing the high-precision matching, new records imported into the environment can be resolved against the master registry and quickly linked to all instances across the collection of supplied customer data."

\*Informatica Corporation acquired Identity Systems in May 2008. Identity Systems products have been repackaged.

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