



## PALIC Accelerates Business Processes and Improves Customer Satisfaction with Informatica

### BUSINESS INITIATIVES

- Improve customer satisfaction
- Accelerate business processes

### TECHNOLOGY STRATEGY

- Integrate decentralized business data stored in branch systems and build a data environment for consolidating all application systems
- Build a customer-centric single customer view
- Establish a business query system that provides all-around data

### BENEFITS

- Improved efficiencies in operation management and decision making
- Improved customer satisfaction
- Reduced future workloads for integrating data of new systems
- Lay a solid foundation for continued development of the information system

### SOLUTION

- Informatica® PowerCenter®
- Informatica PowerExchange® with Change Data Capture Option

“The Informatica enterprise data integration platform allowed us to understand our customer data multi-dimensionally, accelerated our business processes, and improved our customer satisfaction. More importantly, it established an accurate historical data infrastructure environment for attracting more customers in the future, and created a sophisticated and complete data system for our company.”

— Edward Tsai, IT General Manager of PALIC

### About Pacific-Antai Life Insurance Company Limited

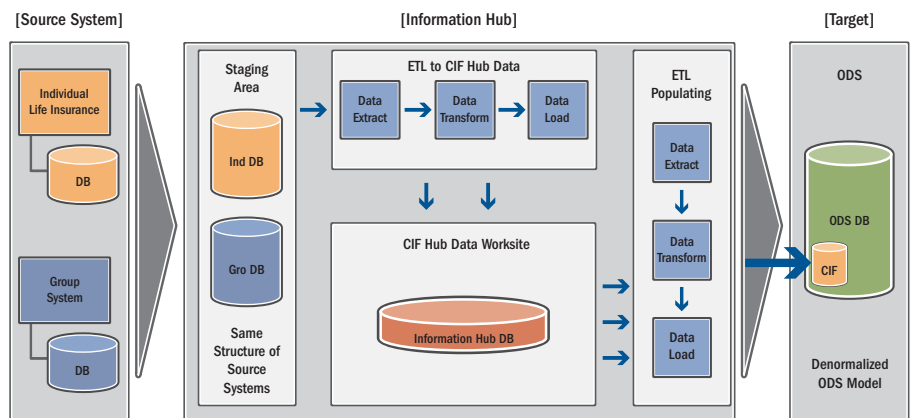
Pacific-Antai Life Insurance Company Limited (PALIC), a joint venture between China Pacific Insurance (Group) Co., Ltd. and ING Group N.V., was established in 1998 in Shanghai, specializing in life insurance in Shanghai and Guangdong. With its successful experience in global life insurance management, PALIC has grown rapidly to more than 500 employees and nearly 3,000 registered insurance agents, as well as 20 sales offices in Shanghai and Guangdong.

### Challenges Facing Current Data System

The rapid development and dramatic growth of PALIC's customer base caused a series of challenges to its data system. There were four key issues:

- Lack of a customer-centric single customer view: Because the system was policy-centric and based on business processes, it was difficult to provide a customer-centric view. Based on the requirements of business departments, the demands of data analysis and data mining were resolved manually. IT staff extracted data manually from the database using business systems and passed the data on to business departments for a further manual process. This laborious series of processes reduced operational and decision-making effectiveness.
- Business data was stored in different systems: Individual Life systems and Group systems did not support the company hierarchy, and each branch office had its own distinctive set of data. As a result, data could not be shared across system submodules, making it inconvenient for customers and causing inefficiencies within the organization.

- The existing business query system could not provide overall data: As a result, the quantity of phone calls transferred from customer service to the back office constantly remained at a high level, leading to inefficient call sharing, poor customer service, and decreased customer satisfaction.
- Complicated data abstraction: The sales self-service Website is used by agents for policy and customer profile inquiries and for creating insurance proposals. The data for this system, however, was acquired directly from business systems through open database connectivity, so the result was unavailable or complicated data abstraction.
- Changes to the business system also greatly impacted the means for abstracting data.



## Data Integration Leader Opinion

In China, the vast majority of financial institutions face problems such as creating a single customer view, data exchange, and data quality. Because financial institutions emphasize customer satisfaction, such problems prevent more detailed, faster, and more effective development. Moreover, due to the legacy of historical data generated during the rapid development of financial institutions, data quality is a particularly urgent issue. PALIC turned to Informatica because the data integration leader has helped financial institutions worldwide gain business results by rapidly increasing business value, including establishing a single customer view, improved customer satisfaction and retention, faster data exchange, better data quality, and lower compliance cost.

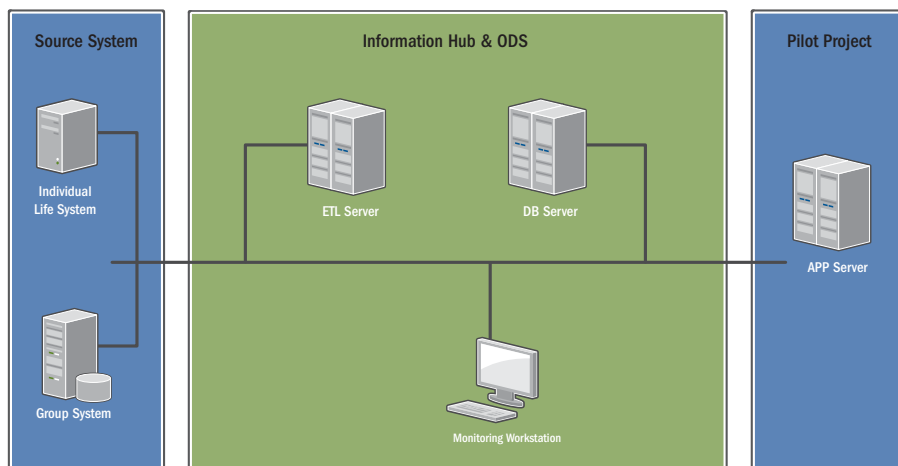
To address the real needs of PALIC's customer service center, Informatica helped establish an operations information infrastructure, including an information hub and operational data store (ODS). By leveraging Informatica PowerCenter, PALIC built a data integration environment that enables it to organically integrate data of different formats, with different characteristics and from different sources logically or physically, providing total data sharing across departments.

Based on the data integration foundation, PALIC further completed a query system pilot project for the customer service center. The pilot project created a new customer information view and relevant information (single customer view, accurate and consecutive information, accessible and available information), provided more detailed information, decreased call center transfers, and reduced pressure on other internal business units.

## Data Integration Solution Deployment Process

The deployment of the information hub and ODS system for PALIC consisted of three phases:

Phase I: Build up a preliminary information hub and ODS platform, and implement the pilot project for the customer service center's query system. In other words, improve the core data quality of PALIC Shanghai and Guangdong branches and the data required for the customer service center query system; cleanse, consolidate, and load the data into the ODS database; then transform the multiple databases into a single customer view for better service.



Phase II: Improve the information hub and ODS platform, finish extracting group insurance data and loading it to the information hub and ODS platform, improve the query system of the customer service center, and complete plans for extracting E-support system data from the information hub and ODS platform. This involved using the information hub 2.0 data model built by ING's Asia-Pacific head office. Leveraging the rapid delivery of Informatica's solution and through data abstraction, PALIC was able to load data dispersed across individual systems into the ODS database without any loss in quality, including individual life insurance claim settlement and policy owner service data, group insurance system data, unit-link system data, agent commission and bonus data, and accounting data of the financial department.

Phase III: Establish the data warehouse and applications to support the information necessary for management and decision making. Build up the data warehouse based on the mature ODS database, and use Informatica PowerExchange Change Data Capture feature to extract changing data, thereby addressing customer needs for high-quality data analysis and data mining.

During project implementation, Informatica PowerCenter enabled PALIC to realize an overall data integration design, including metadata management and data abstraction. As the data integration platform for a series of decentralized operating systems, PowerCenter allowed PALIC's customer service staff to acquire, integrate, migrate, and consolidate massive data from different sources; it also provided complete and consecutive master customer data based on metadata. PowerCenter Designer was used for data process design and source and target data management, PowerCenter Repository Manager handled design information, and PowerCenter WorkFlow Manager developed processes for loading management data, as well as monitoring execution of management data.

Informatica PowerExchange®, with its Change Data Capture (CDC) capabilities, provides a simple way for PALIC's life insurance customer service staff to define data sources and capture incremental database changes as they occur. The CDC option provides direct access to host databases and allows easy integration with host-based applications without requiring host operating system experience and skills.

## Benefits to PALIC

Informatica's data integration solution contributes to overall improved operation management and decision making at PALIC. It has resolved the problem of decentralized business data storage, integrated business data dispersed in different systems, and built up an entire company data environment, as well as established a customer-centric single customer view. Effective integration of business data provided the business query system with overall data, reduced data abstraction complexity, and improved customer center service efficiency.

Deploying Informatica's solution greatly improved PALIC's customer service efficiency, resulting in significantly increased customer satisfaction. It also lowered the number of transferred calls by the service department, improving call connection quality. Overall, employees' workloads in the financial department's accounting office and Life Administration office were reduced.

Informatica's solution supports data integration across multiple systems, reducing significant data integration workloads in future systems and lowering operational risks. With this solution, PALIC was able to gradually transform its current systems and become less dependent on legacy systems. Through the process of abstraction, transformation, and loading via Informatica's data integration system, ING can now process complex data from 800,000 users every day, and processing capacity of the new system far exceeds the previous processing capacity.

Informatica's solution established a single customer view for PALIC, and the solution enables PALIC to be well prepared for data warehouse development, historical data analysis, and future business intelligence deployment, creating a solid foundation for further development of its information system.

## LEARN MORE

Learn more about PowerCenter and the entire Informatica product platform. Visit us at [www.informatica.com](http://www.informatica.com) or call 800.653.3871.

## ABOUT INFORMATICA

Informatica enables organizations to gain a competitive advantage in today's global information economy by empowering them to access, integrate, and trust all their information assets. As the independent data integration leader, Informatica has a proven track record of success helping the world's leading companies leverage all their information assets to grow revenues, improve profitability, and increase customer loyalty.



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