



The Principal Increases Productivity and Marketing Effectiveness by Migrating to an Informatica Solution

“The Principal chose Informatica as our data integration solution because of its rich technology features. Informatica enabled The Principal to improve developer productivity and to leverage metadata throughout the enterprise and has become an integral component in our warehouse strategy.”

—Rosie House, The Principal

CHALLENGE

Building a scalable and flexible architecture capable of integrating data across the enterprise to provide a single customer view

INFORMATICA SOLUTION

- Informatica PowerCenter®
- Informatica PowerConnect® for PeopleSoft

BENEFITS

- More effective marketing programs
- Easy access to PeopleSoft data
- Improved development productivity

NUTS AND BOLTS

- Data Integration: Informatica
- Sources: PeopleSoft, DB2, legacy mainframe, Oracle, SQL Server, flat files
- Targets: Oracle, SQL Server, DB2
- Platform: IBM AIX, Sun Solaris, NT

The Principal Financial Group (The Principal) is a leader in offering businesses, individuals and institutional clients a wide range of financial products and services, including retirement and investment services, life and health insurance and banking through its diverse family of financial services companies. The Principal has \$187.8 billion in assets under management and serves 15.2 million customers worldwide from offices in Asia, Australia, Europe, Latin America and the United States.

The Challenge

With an increasingly deregulated financial service environment that has blurred the walls dividing banking, insurance, and securities, the financial service industry has undergone many changes in recent years. These changes include increased competition, industry consolidation to develop economies of scale, an expansion in the range and breadth of products, and a heightened focus on customer segmentation and customer relationship management. Indeed, one of the most significant developments in the financial service industry has been a shift from a product-centric to a customer-centric view of business.

To support the needs of over a thousand business users, The Principal was looking to build a scalable, robust, and flexible data warehouse architecture that could scale into the multi-terabyte range, source data from numerous source systems, and support multiple business units—all through the use of an integrated data integration solution. A solid data warehouse architecture was essential to accommodate changing and dynamic business requirements, many of which could not be anticipated.

The Principal wanted to eliminate the many manual data integration processes that had been used, such as COBOL programs and SQL Loader, to provide one consistent development foundation across the company. Also, The Principal wanted to build a hub and spoke architecture to centralize and leverage metadata across different divisions, leverage parallel development capabilities by having spokes act as individual development units that could easily be merged, and optimize performance by maximizing processing power across different systems.

The Solution

The Principal selected the Informatica data integration platform because of its robust metadata architecture, ability to source from virtually any data source, and ease of use.

The software is used to support several critical customer-driven areas within the reporting environment of The Principal, supporting over a thousand business users.

The first business unit that successfully implemented Informatica was the global finance resource division, which acts as the foundation for financial infrastructure of The Principal by capturing and storing the lowest level of detail to consolidate all financial reporting and analysis corporate-wide.

Next, the human resources division used Informatica PowerConnect for PeopleSoft to extract data out of PeopleSoft, where its used for not only typical HR functions, but also for expense management, interactive voice response call log analysis, telephone charge back analysis, supplier diversity analysis, and Web logging.

The Principal's two largest Informatica data integration implementations-both at roughly one terabyte-include life and health insurance for claims analysis and its customer and marketing division, which is integrating customer data across product lines to provide a single customer view for developing highly targeted marketing campaigns.

Through a central Informatica PowerCenter hub and four Informatica PowerMart spokes, The Principal has been able to implement an enterprise-wide data repository, which hosts shared metadata and consistently shares the same objects across different local data repositories. For its different divisions, which use specific metadata definitions for their various projects, a local metadata repository is also used to satisfy specific project needs.

The Results

More effective marketing programs

By having a full 360-degree customer view, The Principal has integrated customer data across product lines to develop highly targeted marketing campaigns. In addition, The Principal can now gauge certain customer behavior, anticipating the likelihood that a customer will be interested in specific financial products.

Easy access to PeopleSoft data

By using the Informatica PowerConnect for PeopleSoft to integrate HR data from PeopleSoft, The Principal has been able to increase performance and quickly deploy its HR data mart, saving time and costs, as the need to configure unique tables structures and relationships, such as trees and hierarchies, has been eliminated.

Improved development productivity

Through the easy to use Informatica Designer and by visually defining mappings and transformations instead of writing complex COBOL code, The Principal has been able to improve development productivity by an average of 30 percent, resulting in development cost savings.



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