Modernizing Distribution Analytics:

Global Asset Management Company Improves Global
Sales and Marketing Decision-Making

*"Informatica Intelligent Cloud Services lets us
quickly provision the data that our sales and
marketing organization needs to make quick
decisions based on business strategy."*

Vice President of Data and Analytics
Global Asset Management Company

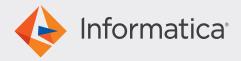| Goals	Solution	Results
Help fast-growing global distribution organization on their analytics journey to enable more informed sales and marketing decisions	Use Informatica Intelligent Cloud Services integration Platform as a Service (iPaaS) to bring customer and financial data from Salesforce and other systems into a cloud data lake	Delivers quicker and deeper sales and marketing insights, identifying sales patterns to target future prospects and optimize territories
Accelerate cloud migration and IT modernization efforts with fast time to value for cloud data warehousing	Integrate curated data from the data lake into Snowflake using the Informatica Snowflake Data Warehouse Connector for AWS	Provides faster time to value for cloud data warehousing with native support for Snowflake on AWS
Build a flexible, reusable foundation for future data science and analytics initiatives	Leverage third-party datasets for competitive intelligence, using Informatica Cloud Data Integration and prebuilt connectors to integrate data from any source	Helps to position the company for advanced data science projects, such as attribution and propensity modeling, next-best-action, and closed-loop marketing

Business Requirements:

- Quickly and easily develop data integration mappings

- Follow a cloud-first strategy for scalability and cost efficiency

- Bring in third-party data for deeper discoveries

About Global Asset Management Company

With more than a trillion dollars in assets under management, this Global Asset Management Company is focused on delivering investment excellence and retirement services for institutional and individual investors.

Informatica Success Story: Global Asset Management Company

Putting clients' interests first is the philosophy on which this Global Asset Management Company was founded more than 80 year ago. With a disciplined, risk-aware investment approach focusing on diversification, style consistency, and fundamental research, this company helps more than 2.2 million workplace retirement savers feel confident in pursuing their financial goals. The organization provides a broad array of mutual funds, sub-advisory services, and account management for individual and institutional investors, retirement plans, and financial intermediaries, as well as sophisticated investment planning and guidance tools.

The global distribution organization is critical to the company's ongoing success. It supports the institutional investing and financial intermediary business segments, helping sales and marketing teams better understand which customers they should be targeting with different products and campaigns. A team of data engineers brings information together from various domains including sales, marketing, financials, and third-party market data, to help inform the sales and marketing organization.

Previously, the company built reports and dashboards on top of an on-premises, Microsoft SQL Server-based data mart. However, as the business grew by hundreds of billions of dollars and investors' portfolio preferences began to change, it became imperative that the company modernize with a cloud transformation and put a formal analytics strategy in place to manage the volume.

"We needed a good data and analytics strategy in order to support the growing needs of our global distribution organization," says the Vice President of Data and Analytics at the Global Asset Management Company. "But first, we needed a way to get data from source systems into a cloud data warehouse that would serve as a curated data source for distribution analytics."

Building a cloud data pipeline

To achieve its modernization goals, the company moved key applications to Amazon Web Services (AWS) and began using Snowflake on AWS, a managed cloud data warehouse, to reduce the operational overhead of maintaining a data warehouse.

To bring data from Salesforce and on-premises systems into the data lake, the company chose Informatica Intelligent Cloud Services, which includes Informatica Cloud Data Integration and hundreds of prebuilt

connectors for common data sources. Once it lands on Amazon S3 storage, curated data is then fed from the cloud data lake into the Snowflake data warehouse using the Informatica Snowflake Cloud Data Warehouse connector. The combined solution enables the company to integrate and combine data from a broad range of sources with a high degree of quality and consistency.

"We had experience using Informatica Intelligent Cloud Services to bring data back from our Salesforce environment into our operational data stores, so we knew that Informatica Cloud Data Integration would give us a fast start in getting data into our Snowflake data warehouse," says the Vice President of Data and Analytics. "Informatica's connectivity for Snowflake on AWS made it easy."
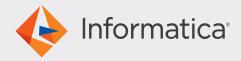
More granular sales and marketing insights

The company's global distribution team can now use a data preparation tool to create analytic models based on data in Snowflake and then output the results to Tableau for consumption. With more granular reporting, salespeople can better understand key metrics for year-end sales and compensation reporting, and on which customers and prospects they should target next in their territories. Marketing professionals can gain new insights into customers' changing portfolio preferences and investment patterns, helping them tailor personalized, customized campaigns throughout the year.

"Informatica Intelligent Cloud Services lets us quickly provision the data that our sales and marketing organization needs to make quick decisions based on business strategy," says the Vice President of Data and Analytics. "Our global distribution team can show them where they need to move forward and which territory segments they need to optimize. That's the power that we are bringing in by enriching the data, curating the data, and making it available to business users on the platforms of their choice."

Unleashing future analytics potential

With Informatica, the company now has the agility and scalability it needs to provide universal access to analytics. As the company matures its data and analytics strategy, it will seek to unleash more insights from third-party competitive intelligence datasets, using Informatica Intelligent Cloud Services to bring customer and financial data in quickly and seamlessly. With the freedom to integrate data from any cloud or on-premises data source, the company plans to expand its knowledge discovery and data science work to include attribution and propensity modeling, next-best-action marketing, and closed-loop reporting.
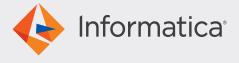
"We knew that Informatica Cloud Data Integration would give us a fast start in getting data into our Snowflake data warehouse. Informatica's native connectivity for Snowflake on AWS made it easy."

Vice President of Data and Analytics
Global Asset Management Company

Informatica®

"As a team of data engineers, we are proud that we are now able to help our global distribution organization on their analytics journey," says the Vice President of Data and Analytics. "We will continue to build on our success with Informatica Intelligent Cloud Services, potentially using Informatica Cloud Data Integration Elastic service for serverless processing of very large datasets."

Inside The Solution:

- Informatica Intelligent Cloud Services
  - Informatica Cloud Data Integration

"We needed a good data and analytics strategy in order to support the growing needs of our global distribution organization. But first, we needed a way to get data from source systems into a cloud data warehouse that would serve as a curated data source for distribution analytics."

Vice President of Data and Analytics
Global Asset Management Company

Digital transformation is changing our world. As the leader in enterprise cloud data management, we're prepared to help you intelligently lead the way. To provide you with the foresight to become more agile, realize new growth opportunities or even invent new things. We invite you to explore all that Informatica has to offer—and unleash the power of data to drive your next intelligent disruption. Not just once, but again and again.

Informatica Worldwide Headquarters
2100 Seaport Blvd, Redwood City, CA 94063, USA
Phone: 650.385.5000 | Fax: 650.385.5500 | Toll-free in the US: 1.800.653.3871
informatica.com | facebook.com/InformaticaLLC | linkedin.com/company/informatica | twitter.com/Informatica

IN05_0620_3295