



Global Investments Bank

# Democratizing Financial Services Data:

Global Investments Bank Catalogs Data for Competitive Advantage



*"Informatica Enterprise Data Catalog improves our ability to harness our data for business value and increase the volume and veracity of our data to our clients and to our regulators."*

**Director**  
Enterprise Data Governance  
Global Investments Bank

## Goals

Empower data stewards to quickly find the customer and billing information they're looking for and understand where it came from

Keep data quality high and allow employees to fully understand the quality levels of key data assets by viewing data quality rules

Deploy a solution quickly to stay ahead of competitors and meet evolving business and compliance requirements for the financial industry

## Solution

Scan application and master data (customer and billing) into Informatica Enterprise Data Catalog for fast, easy data discovery and lineage tracking

Use Informatica Data Quality to integrate with the catalog and tie critical data elements back to data quality rules

Engage Informatica Professional Services to deploy the solution, completing the initial rollout in just three months

## Results

Manages data across the organization, saving thousands of hours a year and reclaiming millions of dollars in annual productivity

Helps improve the quality, veracity, and accuracy of data while giving employees greater visibility into how data should be used

Provides fast time to value, helping the Bank maintain its reputation as a financial services leader in technology and data management

## Business Requirements:

- Scale data catalog to include 2,000 applications
- Provide modern search and discovery features
- Leverage AI to identify and track data based on similarity

## About the Global Investments Bank

This Global Investments Bank is dedicated to helping its clients manage and service their financial assets throughout the investment lifecycle. The Bank has more than \$37 trillion in assets under custody and/or administration, and \$2 trillion in assets under management.



## Informatica Success Story: Global Investments Bank

This Global Investments Bank is one of the world's largest and most respected investment banking firms. With clients in 35 countries, the Bank provides financial services for institutions, corporations, and individual investors, delivering informed wealth management and investment services for clients looking to create, trade, hold, manage, service, distribute, or restructure their investment portfolio. Its clients include some of the largest financial institutions in the world.

The Bank is embracing digital to help investment bankers and clients work together in a simpler, smarter, and safer manner. That means customer and financial data is more important than ever to the bank's business strategy. However, it wasn't always easy for data stewards to find the information they needed to transact business. To understand where data lived and where it came from, employees had to search, ask questions, and make assumptions.

"The biggest challenge we had was managing data," says the Director of Enterprise Data Governance at Global Investments Bank. "Employees needed to get their hands-on customer and financial data, and they didn't always understand where it was. We have more than 2,000 applications, and each of those data structures may have 800 to 1,000 tables. And each of those tables might have 50 to 200 data elements. We didn't want people spending their time searching for a needle in a haystack."

To help 2,000 data stewards and analysts easily find the information they needed and understand the quality levels of key data assets, the Bank began looking for a cataloging solution with integrated data quality. The Bank wanted a solution that would be intuitive and fast to deploy, so it could stay ahead of competitors and meet evolving business and compliance requirements such as General Data Protection Regulation (GDPR) and the Basel Committee on Banking Supervision standard number 239 (BCBS 239).

"We always want to be considered to be a leader in investment banking, and these days that requires a lot more transparency into the data," says the Director of Enterprise Data Governance. "Data is our lifeblood; it's the oil that drives the machine. We've seen other banks fail because they haven't had a good financial data management strategy in place."

## Giving employees fast access to data

Global Investments Bank considered three different cataloging solutions, involving both business and technical teams in the evaluation process. After a detailed proof of concept, the Bank selected Informatica Enterprise Data Catalog based on its ease of use and ability to provide AI-powered recommendations based on data similarity.



*"There is a substantial time savings associated with Informatica Enterprise Data Catalog. It's helping employees do exactly what we expected, which is being able to find information and increase the value of our services and brand. It's helped immeasurably."*

**Director**

Enterprise Data Governance  
Global Investments Bank

"We chose Informatica Enterprise Data Catalog because it has an intuitive search capability, as well as comprehensive discovery," says the Director of Enterprise Data Governance. "Within the catalog, a user might be interested in one field, but there may be other fields that can offer valuable insights. The fact that Informatica offers an AI-powered data catalog was a big factor in our decision, because the pace of banking is moving too fast for humans to do everything. We want to adopt more AI and machine learning to keep our data in skew, and self-regulate any issues with our critical data elements."

To accelerate the implementation, the Bank engaged Informatica Professional Services, completing the initial rollout in just three months. It then began scanning critical data sources into the catalog, including risk data and asset servicing, as well as customer and billing master data. The solution provides complete tracking of data movement, from high-level system views to granular column and metric-level lineage.

"Informatica Enterprise Data Catalog improves our ability to support our data and increase the volume and veracity of our data to our clients and to our regulators," says the Director of Enterprise Data Governance. "Every time I demo the solution for a business unit, they love it. They can't get enough of it. I always get two questions: When are you coming to me? And how do I accelerate that if you're not coming to me tomorrow?"

To date, the Bank has scanned more than 300,000 data assets and 500,000 data elements into Informatica Enterprise Data Catalog, using Informatica Data Quality to integrate with the catalog and tie critical data elements back to data quality rules, while adhering to guidelines for personally identifiable information (PII).

"Having integrated data quality was important for us to be able to provide our data community with a high level of quality and sophistication," says the Director of Enterprise Data Governance. "Data quality rules are visible right from Informatica Enterprise Data Catalog. Users can see if there is PII associated with a data asset, or other compliance implications. They can see the data classifications, domains, and frequencies, and whether a data element is certified for use. They have so much information at their fingertips that before would have taken them a couple of days to get."

**Saving millions of dollars a year in productivity**

As the Bank continues to scan 50 applications a month into the catalog, democratizing data across the organization will save thousands of hours a year and reclaim millions of dollars in annual productivity. Not only can users find information much faster, they can avoid having to contact other employees to ask questions about the data. Instead, they can refine their searches, get the information they need, and move on to other tasks.





### Inside The Solution:

- Informatica Enterprise Data Catalog
- Informatica Data Quality
- Informatica Professional Services

“There is a substantial time savings associated with Informatica Enterprise Data Catalog,” says the Director of Enterprise Data Governance. “It’s helping employees do exactly what we expected, which is being able to find information and increase the value of our services and brand. It’s helped immeasurably.”

### Empowering customers with self service

Cataloging enterprise data is helping the Bank maintain its reputation as a financial services leader by giving employees the information they need to serve clients better. Eventually, the Bank plans to extend the benefits directly to clients by allowing them to view and search catalogs of their own financial data.

“We got a ton of value from Informatica Enterprise Data Catalog right away, and our CIO is extremely proud of what we’ve been able to accomplish,” says the Director of Enterprise Data Governance. “But our ultimate goal is to put catalogs in the hands of our clients, so they can see their data and build their own reports. That’s true democratization of data.”

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.

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