Counting on Data Analytics:

Paycor Gains Deeper Insights into Customer Billing

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Chris Eldredge
Senior Director of Business Intelligence, Paycor

Goals	Solution	Results
Deliver an end-to-end, modern analytics platform for consistent, daily reporting and business insights regarding billing services usage by customers	Bring data from Salesforce and other source systems into a Snowflake cloud data warehouse on Microsoft Azure using cloud-native Informatica Intelligent Cloud Services	Delivers an end-to-end analytics platform for consistent, accurate, and aligned reporting across the organization to aid in services usage analysis
Enable more timely data access for Paycor employees, while minimizing manual processes	Automate the data loading process using Informatica Cloud Data Integration and the Informatica Cloud Connector for Snowflake	Makes data available 4x faster, at the beginning of each business day, while increasing productivity by freeing up 4 FTEs for more valuable work and analyses
Democratize data quality to cope with constant change in business processes and regulatory compliance	Implement data quality rules and scoring	Improves data quality metrics including accuracy, completeness, and timeliness to aid in client billing analysis

About Paycor

Paycor's HR software platform modernizes the way companies manage people, including the way they recruit, onboard, and develop talent. In 1990, Paycor realized that leaders of medium and small businesses need a unique combination of human capital management (HCM) technology and expert HR advice to achieve their goals. Today, Paycor partners with more than 40,000 organizations nationwide.

Informatica Success Story: Paycor

When it comes to human resources and payroll, small and medium businesses have the same goals as larger corporations: attract and retain top talent by offering smart compensation and benefits packages. Paycor helps them achieve these goals with a cloud-based, all-in-one HR solution that combines recruitment tracking, onboarding, time and attendance, payroll, and more.

Over the years, Paycor has seen increasing demand from its employees for reporting and analytics to help them track client billing. With an average payroll cycle of two weeks, daily reporting was not traditionally emphasized. However, new business and compliance requirements were pushing the company in that direction. As a software company in the HR and payroll space, Paycor must comply with ongoing changes in regulations and billing.

To make reporting more frequent and granular, Paycor needed to revamp its data warehouse and data integration processes. Loading data from transactional systems and cloud sources such as Salesforce into Microsoft SQL Server required four employees, and the process took three to four workday hours. During the data load, analysts were locked out of the database and lost roughly half a day before they could start analyzing the data.

Paycor also faced additional reporting challenges. Metrics were not consistently aligned, and customers and products were grouped differently across business units. Some reports didn't enable drill-through, and data latency was an issue.

"To alleviate our reporting challenges, we needed to build a modern analytics platform from the ground up, and the business wanted it in less than a year," says Chris Eldredge, Senior Director of Business Intelligence at Paycor. "We also wanted to change our culture to become more data centric, so we needed user-friendly tools that employees would want to adopt and use."

Migrating to cloud in less than one year

Paycor looked for a modern, cloud-based data lake and data warehouse solution that could easily scale, and decided to use Snowflake running on Microsoft Azure. Paycor partnered with Snowflake for a myriad of reasons: it allowed for cloud-based data platform, multi-tenancy support, scalability in minutes not weeks, ease of deployment, the ability to leverage existing SQL skills, and high performance. However, to get the most from the solution, Paycor needed an integration layer that could automate data integration and data quality scoring.

"We wanted to separate data management from data storage and minimize the amount of customization we would have to do to meet our timelines," says Eldredge. "Informatica Intelligent Cloud Services stood out to us because its native integration with Snowflake could accelerate our cloud migration. Snowflake offers direct integration with Salesforce, but you don't get data management capabilities with that."

Informatica Intelligent Cloud Services is the industry's leading enterprise iPaaS and the most modern, comprehensive, microservices-based, cloud-native, API-driven and AI-powered iPaaS, offering the highest enterprise scale and trust. Using Informatica Intelligent Cloud Services, Paycor rebuilt its data pipeline with a very lean team and deployed it into production in less than a year. Informatica Cloud Data Integration now automatically loads data into Snowflake, leveraging the prebuilt connectivity for Snowflake to eliminate manual coding. Meanwhile, data quality rules are used to check data for accuracy and completeness, making sure all required fields are supplied.

"Informatica Intelligent Cloud Services helps us get the most value out of Snowflake," says Eldredge. "We don't have to invest in large-scale manual processes; instead, we can spend our time actually analyzing the data. Before, when somebody asked for data, it might have taken weeks to get it to them. Now it's a matter of hours."

Enabling new business insights

The data loading process now completes in less than an hour, and it is done before the analytics team begins work in the morning. This has freed up four full-time employees to do more strategic work and enables them to analyze the data sooner rather than waiting for the loads to finish.

"Since we modernized analytics using Informatica Intelligent Cloud Services and Snowflake, our team is much more focused on analyzing the data and gaining insights into how we are billing for services," says Eldredge. "With the additional time, the team was able to identify areas for improvement in the billing process. This is going to have a huge financial impact in the coming weeks and months by closing potential billing loopholes."

Responding quickly to a global pandemic

With the new solution in place, Paycor is quicker to respond to external factors. For instance, when the COVID-19 pandemic hit, Paycor already had the cloud solutions in place to pivot almost immediately to daily reporting, tracking approximately 50 KPIs including sales appointments and contact center metrics.

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The analytics team was able to quickly gain insights and provide business users with the intelligence they needed to navigate the "new normal," including statistics concerning the top customers by billing and the number of daily bookings.

"COVID-19 forced our business to think about daily data very differently than we ever have before," says Eldredge. "Because we had already done the prep work with Informatica Intelligent Cloud Services and Snowflake, we were able to be the heroes. The business started coming to us with questions and we were able to quickly turn around the data and give them answers. And that is very powerful."

Inside The Solution:

- Informatica Intelligent Cloud Services
  - Informatica Cloud Data Integration
- Snowflake
- Microsoft Azure
- Salesforce

"Informatica's native integration with Snowflake helps us manage that conformity with a set of light transformations to make sure that the data from source systems works consistently in the data lake."

Chris Eldredge

Senior Director of Business Intelligence, Paycor

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.