



Informatica Innovation Award Winner

Mastering Successful Projects:

PMI implements MDM on the cloud in 90 days to meet a critical business transformation timeline



“Informatica MDM – Customer 360 plays a critical role in our business and digital transformation, helping us deliver the customer experience that younger generations of professionals expect.”

Lance Dionne

Data Quality and Master Data Lead
Project Management Institute

Goals

- Deliver a valuable, engaging, and personalized member experience by better understanding our members
- Streamline acquisition and application integrations to accelerate PMI’s business and digital transformation
- Capture member demographics to provide relevant services and offer in-person services located in proximity to members

Solution

- Use Informatica MDM – Customer 360 to automate mastering of customer data and create a golden record across multiple source systems
- Connect on-premises and cloud applications using Informatica Intelligent Cloud Services to support real-time performance needs. PMI’s CRM was the first application connected to IICS, others to follow in the future.
- Verify, validate, cleanse, and enrich member contact information using Informatica Data as a Service

Results

- Established a scalable and flexible foundation to support significant global growth
- Gained insights through customer data to better serve members and deliver a better experience, which improved customer retention and resulting in increased revenue to reinvest in the PMI community
- Established a comprehensive view of member data to guide the personalized functionality of the digital platform

Business Requirements:

- Build better member profiles to increase engagement and value
- Use a cloud solution to speed deployment and reduce costs
- Support CRM modernization within 90 days

About Project Management Institute

Project Management Institute (PMI) is the world's leading association for the project management profession.

Through global advocacy, collaboration, education, and research, we work to prepare more than three million professionals around the world for the Project Economy: the coming economy in which work, and individuals, are organized around projects.

Celebrating our 50th anniversary in 2019, we work in nearly every country around the world to advance careers, improve organizational success and further mature the project management profession through globally-recognized standards, certifications, communities, resources, tools, academic research, publications, professional development courses, and networking opportunities.



Informatica Success Story: Project Management Institute (PMI)

We live in a world where digital devices, smart devices, and other technologies are a critical enabler for business interaction and community building. Professional associations worldwide need to embrace these technologies as they seek to connect with all generations of professionals, including those who have grown up with digital tools. Younger professionals work, learn, and socialize in dramatically different ways than previous generations. Professional associations need to transform to support these professionals to maintain relevance and avoid obsolescence. PMI is in the midst of a business transformation based on customer-centricity and agility. Having complete and accurate member data is core to delivering on the organization's transformation goals.

PMI depends on customer data to gain insights at an individual member level and tailor products and digital experiences to align with the member's career goals and aspirations. PMI is making significant investments in data management, machine learning, and analytics to deliver on this personalization. One key component of personalization is the mastering of customer data. Personalization relies on a 360 view of each member based on matching and merging data captured across internal systems and external data sources. Mastering this customer data is made possible using Informatica's MDM cloud solution.

"We wanted a complete customer data management solution that would allow us to think big, start small, and grow fast," says Lance Dionne, Data Quality and Master Data Lead at PMI. "To achieve that kind of speed and agility, we needed a cloud master data management solution with integrated data quality and prebuilt data models."

Fast time to value with cloud MDM

Time was of the essence for PMI to select and implement an MDM solution. As part of the PMI transformation, a new CRM implementation relied on an MDM for customer data. The MDM team had under six months to evaluate, select, contract, and implement the MDM solution. They needed to select a product provider that would meet a diverse set of needs, continue to innovate with them, and provide a cloud solution enabling rapid implementation. After evaluating the cloud MDM solutions on the market, PMI selected Informatica MDM – Customer 360, a master data-fueled application built on top of the Informatica Intelligent Data Platform. The solution allows PMI to combine data quality, data integration, and data-as-a-service for address cleansing in a single master data management solution on AWS. The outcome is a golden customer record created from multiple source systems, helping to provide a clear picture of each member. PMI deployed the solution in just 90 days from contract signing, meeting its business requirements to match, merge, and cleanse millions of customer records.



"For us, being data-driven is key to our digital transformation. Informatica is helping us use data to shape customer experiences, increase engagement, and monetize that engagement."

Mark Broome

Chief Data Officer

Project Management Institute



"Cloud MDM was the biggest contributing factor to our speed of implementation," says Dionne. "Within just a few business days, we had an environment fully stood up and could start development immediately. Informatica MDM – Customer 360 also provided us with a lower entry cost due to subscription-based pricing, with no hardware to maintain."

PMI began with a consolidation-based implementation style in which master data is consolidated in a hub, then synchronized only to downstream applications and data warehouses in batch. This approach allowed PMI to enrich customer master data and improve data quality without being limited by transactional and operational systems. PMI also leveraged the prebuilt party data model in Informatica MDM – Customer 360, developed with Informatica customers over many years and in many different industries to provide a starting point for successful customer MDM.

"All the relationships and connections we needed were already established for us in Informatica MDM – Customer 360, making the modeling process a simple data mapping exercise," says Dionne. "Informatica's prebuilt party data model is flexible and can be extended to support our unique requirements. We extended the data model to include the many different levels of membership and certification types and statuses specific to our organization. To support analytics efforts, we also extended the model to include customer segmentation and lifetime value."

Improving customer satisfaction and retention

With an authoritative source for all customer data and merged duplicate accounts, PMI is now well-positioned to deliver a better customer experience and improve its Net Promoter Scores. It is also leveraging master data to feed AI-based models to understand customer behaviors and the factors that impact customer churn and sentiment.

"Informatica MDM – Customer 360 improves the accuracy of our machine learning customer churn model and our ability to reduce churn through marketing efforts and content delivery that helps retention rates," says Dionne.

An unforeseen benefit of the match and merge process is PMI's ability to detect fraudulent activity in its certification application process, helping to protect the value of its brand and certifications. Improved data integration also accelerates new application implementations throughout the business, assisting PMI in modernizing and offering enhanced cloud capabilities to employees. As part of its initial match and merge, PMI discovered customer activity that was a deliberate attempt to avoid application audits. These audits safeguarded the reputation of PMI certifications, ensuring only genuinely qualified individuals can pursue certification with PMI.



Inside The Solution:

- Informatica MDM – Customer 360 Solution
- Informatica Intelligent Cloud Services
- Informatica Data as a Service
- Informatica Data Quality

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Through Informatica Data as a Service and enhanced API calls to the Google Maps platform, PMI standardized and validated every customer’s physical location. This capability enables geospatial visualizations and analysis, giving PMI a better understanding of members based on their location and a reliable means to contact and engage with them. Now that PMI knows its members’ locations, it can ensure good coverage for in-person training and identify optimal areas for future chapters.

Engaging future generations of project managers

As future generations of project management professionals emerge, PMI will stay relevant and evolve customer experiences to meet their changing expectations.

“For us, being data-driven is key to our digital transformation,” says Mark Broome, Chief Data Officer at PMI. “Informatica is helping us use data to shape customer experiences, increase engagement, and monetize that engagement.”

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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