



Informatica®

Public Financial
Services Company

Finding a Home for Data:

Public Financial Services Company

Elevates Client and Employee Experience

"With Informatica, we're accelerating our digital transformation by connecting data and applications. Any authorized employee can access clean contact data from Salesforce on their mobile devices and make better decisions."

Development Tech Lead
Public Financial Services Company



Goals

Create a repository for golden records of borrowers created across the company and abolish redundant and duplicate client information

Synchronize data between siloed applications by providing high quality, trusted contact data with correct address, email, and phone number

Drive digital transformation by integrating golden records with Salesforce and Google Cloud's Apigee API Management Platform to deliver high-quality contact data for downstream consumption

Solution

Use Informatica Master Data Management (MDM) to master client data from CRM, marketing automation, and identity governance systems

Clean, standardize, and enrich contact data with Informatica Data Quality, using rules to remove "noise"

Integrate Informatica MDM with Salesforce and Apigee using Informatica Intelligent Cloud Services (IICS) with built-in orchestration capabilities

Results

Enables better customer experiences by providing contact center employees with complete, consistent, unique, and up-to-date contact records

Helps drive digital transformation by securely connecting data and applications across a cloud environment

Improves data stewardship for loan information, enabling faster, better customer service and better business decisions

Business Requirements:

- Ease of implementation and low maintenance overhead
- Minimal or no manual coding for data management and integration
- Ability to expose orchestrations and workflows to Apigee for API management

About the Public Financial Services Company

This Public Financial Services Company is headquartered in Virginia. Its mission is to provide liquidity, stability, and affordability to the country's housing market. Every year, it helps more than a million people buy or refinance their home, and more than 250,000 first-time homebuyers realize their dreams. The company also provides nearly \$4 billion in mortgage funding to support the housing market.

This Public Financial Services Company is listed on the Fortune 500 list of the largest United States corporations by total revenue. Its multiple lines of business support the nation's housing market by providing essential liquidity, promoting responsible lending and sustainable home ownership, and facilitating positive industry change by driving sustainable growth. The company keeps mortgage capital flowing by purchasing mortgage loans from lenders so they in turn can provide more loans to qualified borrowers.

Striving to be one of the best credit guarantors in the business requires using data on a massive scale. Since the Public Financial Services Company began operating, it has funded millions of loans. The company holds millions of active loans in its portfolio. At funding, 75 data elements pertaining to each loan are collected, resulting in billions of pieces of information regarding all loans funded. In addition, the Public Financial Services Company is the custodian of borrower information for millions of borrowers, including property address information for residential properties.

The clients of the Public Financial Services Company are lenders and having fast access to accurate contact data for financial services counterparties, such as banks and sellers, is especially critical to its business. For years, application silos and unstructured data for loan processing tasks conducted via phone, paper, and email, created an inefficient working environment. Contact data was often incomplete or inaccurate—interrupting workflows, requiring manual intervention to locate or correct the data, and creating delays in the business. At times, contact data wasn't supplied or corrected, and contact center workers had old or incomplete records when servicing customers.

The company wanted to move toward digital transformation by creating a single source of truth for counterparty data, reconciling any duplicate or redundant records, and establishing counterparty hierarchies and relationships. In the process, it wanted to automate data quality checks as data is entered across systems and enhance its data governance and business workflow capabilities. It also wanted to integrate deduplicated contact data in real time with a number of downstream cloud applications such as Salesforce, and with on-premises applications in the future.

"For many years, data existed in silos, and it was difficult to get a complete view of our relationships with banks and other counterparties such as property sellers," says the Development Tech Lead at the Public Financial Services Company. "To operate more efficiently and make more intelligent business decisions, we needed to create a golden record for each counterparty and customer."



"By implementing Informatica MDM, we now have high-quality data for contact names, addresses, phone numbers, and email addresses, increasing efficiency enterprise-wide."

Development Tech Lead
Public Financial Services Company

Mastering counterparty contact data

Having successfully partnered with Informatica in the past by using Informatica PowerCenter and Informatica Metadata Manager to provide data to its Single Family business, the company chose Informatica Master Data Management (MDM) to establish a common, authoritative set of data for all its clients that could be used across its lines of business.

"We looked at Informatica MDM and quickly came to the conclusion that it's a very solid product that can help us bridge the gap between different business systems, by reconciling counterparty contact data and providing a comprehensive view of the customer," says the Development Tech Lead. "It also allows us to hierarchically relate all our customers within their organizations."

The company used Informatica MDM to master contacts from three sources to produce golden records: Salesforce CRM, Eloqua marketing automation, and SailPoint identity governance systems. Before the data was deduplicated and merged, it was cleansed and standardized with Informatica Data Quality, using rules to remove "noise" and create a common format for text and numbers. Data was also enriched using third-party sources to populate missing data fields such as address, email, and phone number.

Delivering a golden record to Salesforce

By matching and merging like records and creating hierarchy views with Informatica MDM, the company was ready to deliver a master golden record to Salesforce. But first, it needed a way to interface with Salesforce downstream. To bring data from the golden record into Salesforce in real time, the company selected Informatica Intelligent Cloud Services (IICS), a next-gen iPaaS solution with built-in orchestration capabilities, to integrate Informatica MDM with Salesforce.

"Using Informatica Intelligent Cloud Services to integrate Informatica MDM and Salesforce was effortless," says the Development Tech Lead. "We were able to use out-of-the-box guides to deduplicate our Salesforce records, while preserving and re-parenting the information from the case history for duplicate contacts."

It also used IICS to expose orchestrations and workflows to Apigee for API management without leaving the Informatica interface. Once IICS hands off the service, Apigee handles authentication and monitoring for any data that is distributed downstream to Salesforce, or any other cloud or on-premises application.

"Using Informatica's iPaaS capabilities in conjunction with Apigee lets us put authentication and monitoring in place before we expose anything to the cloud or to any data consumer," says the Development Tech Lead. "That improves security by allowing us to expose services directly from iPaaS for downstream data consumption."



Inside The Solution:

- Informatica Master Data Management
- Informatica Data Quality
- Informatica Intelligent Cloud Services
 - » Informatica Cloud Data Integration
 - » Informatica Cloud Application Integration
- Informatica PowerCenter
- Informatica Metadata Manager



Informatica®

Improving data stewardship and operating efficiency

With Informatica MDM, the company can gain reliable insights from its data to improve efficiency, accuracy, analysis, decision-making, transparency, and compliance. Client and counterparty contact data is now consistently represented across business units and functions in an end-to-end lifecycle, enabling faster, better customer service and more intelligent financing decisions.

"With Informatica, we're accelerating our digital transformation by connecting data and applications," says the Development Tech Lead. "For example, any authorized employee can access clean contact data from Salesforce on their mobile devices and make better decisions."

When clients interact with the contact center, employees can now access complete, consistent, unique, and up-to-date contact records, allowing them to provide a better customer experience. And now that the company has scrubbed counterparty data, the sales organization can confidently search MDM data in real time to quickly locate the contact information they need.

"By implementing Informatica MDM, we now have high-quality data for contact names, addresses, phone numbers, and email addresses, increasing efficiency enterprise-wide," says the Development Tech Lead. "That means when a call center employee searches for one or more of these fields, there is a greater possibility now to get a match. That way, they don't have to create a new contact. Cumulatively, this saves a lot of time."

Pioneering new use cases for data

In the near future, the company plans to continue its digital transformation efforts and orchestrate new data quality use cases across business units using Informatica and expose them through Apigee for downstream consumption. It will also use Informatica and Apigee to solve real-time data needs for custom Java applications, and leverage Apigee to feed data quality metrics to metadata and enterprise data catalogs.

"Publishing mastered contact data from Informatica to Apigee makes data easily accessible and easily discoverable by the enterprise," says the Development Tech Lead. "And it's repeatable; it's build once and reuse. I'm proud of how we've been able to tie our critical business systems together, and unlike custom coding, we know it will be maintainable over the long term."