Getting Closer to Customers:

Wolters Kluwer Empowers Sales with Deeper Customer Insights

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Matt Roberts
Director of Customer Data Management
Wolters Kluwer Health

Goals	Solution	Results
Leverage customer data to improve the service and insights Wolters Kluwer provides to healthcare, financial, compliance, and legal industries	Create a single source of truth for customer data to identify each customer's current compliance requirements and billing information	Helps drive sales and revenue by revealing marketing opportunities and making trusted data available for analytics
Empower Wolters Kluwer Health to increase revenue by identifying upsell and cross-sell opportunities and improving marketing effectiveness	Leverage Informatica MDM to interface with ERP and CRM systems via web services to enable 'real time' data quality and record duplication detection	Allows salespeople to have more informed conversations with customers about their industry-specific compliance needs while streamlining billing
Enable CT Corp., a Wolters Kluwer subsidiary focused on delivering industry leading corporate compliance solutions to legal professionals to increase sales, gain deeper understanding of customers, and provide accurate and timely billing	Match records and integrate external data sources to create customer hierarchies, helping to gain a deeper understanding of customers	Improves data quality and customer data management, reducing searching and maintenance activities

Informatica Success Story: Wolters Kluwer

Every day, Wolters Kluwer helps customers around the world make critical business decisions by providing solutions that deliver vital insights, intelligent tools, and guidance of subject-matter experts. Its vast portfolio of expertise spans health, tax and accounting, governance, risk, and compliance, as well as global legal and regulatory services.

Although Wolters Kluwer has always been an innovator in information services, data has never been more important than it is today to how the company serves its customers. By making big data actionable, Wolters Kluwer can deliver better business outcomes to the industries it serves. Using Informatica Master Data Management (MDM) along with other data quality and integration solutions from Informatica, Wolters Kluwer's business units are delivering more value to customers and increasing sales in two of its subsidiaries: Wolters Kluwer Health and CT Corporation.

Utilizing high-quality customer data at Wolters Kluwer Health

At Wolters Kluwer Health, the business focuses is on clinical effectiveness, research and learning, safety and surveillance, and data intelligence, using proven solutions to drive effective decision-making and consistent outcomes across the continuum of care. As a result of acquisitions, Wolters Kluwer Health operated three separate CRM systems—Saleslogix, NetSuite, and Salesforce—that sales teams used to track their leads, activities, opportunities, and customers. Each system had different sets of business rules, requirements, fill rates, and levels of data accuracy. This made it difficult for sales teams to accurately identify cross-sell and upsell opportunities to generate revenue.

To unify sales teams, the business needed to consolidate customer records from all three systems into a single Salesforce instance as soon as possible, but a small data team was challenged to do so manually. It faced challenges not only in combining the data and translating relationships, but also in getting consistent extracts and integrating with Salesforce. After evaluating several vendors, Wolters Kluwer Health selected Informatica MDM Cloud Edition and Informatica Data Quality using an Informatica Healthcare Data Management Accelerator reference deployment on Amazon Web Services (AWS).

"The Informatica Quick Start program made sense for us because it allowed us to get up to speed and running with an implementation in 10 to 12 weeks," says Matt Roberts, Director of Customer Data Management at Wolters Kluwer Health. "That was much faster and more efficient than what we could have done internally. We went with a cloud hosted solution, which allows us to scale without having to hire new employees and purchase infrastructure."

Wolters Kluwer Health is now validating its CRM data in conjunction with four additional third-party data sets, for a total of seven datasets with approximately 4 million party records. Data is stored in an AWS S3 bucket, from which it flows through Informatica Data Quality for standardization and cleanliness. Informatica Data as a Service verifies and enriches customer contact information as needed. Then, the data is brought into Informatica MDM Cloud Edition for consolidation and deduplication, eventually being published to a unified Salesforce instance through built-in Salesforce APIs.

"Informatica enabled us to deduplicate our customer data across three different CRM systems, creating a single source of truth in Salesforce and yielding about a 40 percent capacity savings," says Roberts. "That gives us deep insights for all three of our sales teams to understand where cross-sell and upsell opportunities exist within each customer organization. It also gives us a clean, standardized data set for reporting and analytics to help drive our sales."

Enabling bi-directional, real-time master data management

Bi-directional MDM at Wolters Kluwer Health keeps customer order information synchronized across multiple systems, including CRM and order management. To do this, Wolters Kluwer Health uses an Informatica web service to push data from Salesforce into Informatica, then writes the data back out using Informatica PowerCenter into an Oracle operational data store with the consolidated CRM data. Order management systems then pull from the same operational data store and sync back to Salesforce for bi-directional, real-time master data management.

"Informatica is instrumental in our ability to actually get to a single source of truth about our customer data," says Roberts. "It's empowering all of our organization to not only identify who our customers are, but also get trusted information about our customers that we were lacking previously. If we didn't have Informatica, I don't think we could have done it."

Conducting more effective marketing campaigns

Wolters Kluwer Health also plans to use the Informatica solution to improve the reach of marketing campaigns while driving down costs. Instead of working off of the three legacy CRM systems with subpar data quality and fill rates, they can be confident that the data they have in their marketing and sales systems is correct, complete, and current.

"Using Informatica to get trusted, validated information into the hands of our marketers and sales teams helps them to connect with the right people at a lower price point because they are not dealing with incorrect phone numbers and returned emails," says Roberts. "Most direct mail pieces now go directly to the right person and are not getting kicked back."

Understanding customers' unique compliance needs at CT Corporation

CT Corporation (CT), a U.S.-based Wolters Kluwer subsidiary and part of the company's Governance, Risk & Compliance business, also implemented bi-directional customer master data management between its ERP system, Oracle JD Edwards EnterpriseOne, and its Salesforce CRM system. A registered agent and legal compliance service firm representing an industry-leading share of large, medium, and small corporations as well as law firms, accounting, and trusted advisor organizations, CT offers expertise in compliance solutions within federal, state, and local jurisdictions. CT provides services that include incorporations, dissolutions, mergers and acquisitions, corporate secretarial, and day-to-day compliance as well as serving as the representative/agent for corporations registered at the Secretary of State.

To provide best-in-class service along with accurate and timely billing, CT needed to improve the quality of its customer data. It wanted to enable centralized management of customer and account maintenance practices, and address customers' unique and changing compliance needs by quickly identifying them during sales and service calls and interactions. However, with disparate systems containing 350,000 active customer records that include lawyers, paralegals, corporations, small businesses, and mid-sized companies, CT needed to master its customer data in order to minimize duplication and create a single source of truth.

Already a long-term Informatica PowerCenter customer, CT selected Informatica MDM Cloud Edition running on AWS to enable real-time data quality checking and correction, understand customer hierarchies, and give sales and service employees a complete and current picture of each customer. Similar in nature

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John Lieto
Director of Data Management
CT Corporation

Inside The Solution:

- Informatica MDM Cloud Edition
- Informatica Data Quality
- Informatica Data as a Service
- Informatica PowerCenter

"What success looks like to us is knowing our customers. Informatica is helping to move us into a whole other universe in which we can easily provide the business with customer relationships and hierarchies they can immediately action."

John Lieto

Director of Data Management

CT Corporation

to the deployment at Wolters Kluwer Health, CT uses real-time, bi-directional master data management, using web services to pass raw and validated data between the EnterpriseOne ERP, Salesforce CRM, and Informatica MDM.

"We looked at five or six MDM products, but we wanted nothing less than a market leader," says John Lieto, Director of Data Management at CT Corporation. "Of what we consider to be the top two MDM solutions on the market based on our research, our customer insight analysts preferred the Informatica solution."

CT deployed Informatica MDM Cloud Edition to transform its customer and account maintenance practices by identifying and resolving duplicate data issues for 27,700 out of 120,000 match groups. CT estimates that the duplication level prior to implementing MDM was near 25 percent. End users experienced symptoms of this duplication, which included confusing search results and not being able to identify the appropriate records to maintain. After the cleanup effort leveraging MDM batch merge and update capabilities with ongoing real time MDM merge task management, CT is maintaining a duplication level of around 10 percent.

CT is now able to provide a consolidated customer view so that sales representatives can offer services tailored to the customers' specific attributes and industry-related compliance needs. CT also created a foundation for building customer dashboards that enables sales and service teams to gain an even deeper understanding of customer relationships at a glance, including customer hierarchies by pulling in information from external industry databases such as Dun & Bradstreet.

"We are enabling the business and pushing it to another level in terms of understanding the customer," says Lieto. "Informatica allows us to merge data, update customer hierarchies, and clean data on the fly, so our salespeople can have better conversations with customers."

Laying a foundation for data-driven digital transformation

With Informatica providing trusted, timely, and actionable customer data, CT can better assign sales and service opportunities, ultimately increasing revenue and improving customer satisfaction. It can also use that data to power digital transformation initiatives, helping the company stay competitive globally.

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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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