

Informatica for Financial Services

Benefits

- Fuel strategic business initiatives and support regulatory compliance with intelligent data governance and privacy solutions
- Deliver a complete 360 view of trusted data, including customer, product, supplier, and reference data, to identify relationships, and deliver business insights
- Accelerate time to insights with big data management, including governed self-service data discovery, data cataloging, data quality, data protection, and data preparation for all types of data

Prioritizing Data as a Strategic Asset in the Financial Services Industry

Digital Transformation in the Financial Services Industry

Across the globe, financial services companies are taking advantage of the power of digital capabilities, artificial intelligence (AI), and machine learning technologies. To stay ahead of the competition, they are modernizing their applications and investing in the right technologies for improved customer experience and business growth. At the same time, companies face challenging market dynamics, rising operational overheads, and increasing pressure to combat fraud and show regulators that they are compliant with existing and new regulations.

Data drives digital transformation in today's modern financial services industry. The demand for data is growing exponentially, however investments to modernize and strengthen data management capabilities across financial services have not kept up with this demand, resulting in higher operating costs and risk of business failure.

Informatica Intelligent Data Platform for Financial Services

Informatica® helps financial services firms accelerate new client onboarding, improve customer engagement, identify new revenue opportunities, comply with regulations, and respond quickly to new market opportunities and threats.

With the Informatica Intelligent Data Platform™ (IDP), powered by the CLAIRE™ engine, you can unleash the power and value of any data across multi-cloud and on-premises environments. This AI-driven platform, built on a micro-services architecture, fuels best of breed solutions to automate previously manual tasks—whether analysis or compliance-related—that slow financial institutions from extracting value from data. The IDP delivers intelligent data governance, master data management, big data management, intelligent cloud services, and data privacy and protection:

- **Data governance and compliance is a continual journey.** Companies that treat data governance as a series of one-off projects end up with a siloed approach. Centralization, automation, and scale are critical for intelligent data governance to foster business and IT collaboration, fuel strategic business initiatives, and support regulatory compliance.

- **Master data management:** While companies are heading down the path of delivering a complete view of data, many still lack a 360-degree view of their client and customer information across traditional business silos and systems. An end-to-end master data management solution delivers and synthesizes trusted and relevant entity, account, service, and reference data for a complete, 360-degree view of any data and any relationship, including interactions and transactions, regardless of business silo or source system, on-premises or in the cloud.
- **Big data management:** In financial services organizations, big data is a reality. And intelligently transforming your business by accelerating time to insights with big data management is key. Manage your entire data environment from legacy systems to cloud data warehousing and data lakes with intelligent solutions, including governed self-service data discovery, data cataloging, data quality, data protection, and data preparation for any sort of user and all types of data.
- **Intelligent cloud services:** Intelligent data management across a multi-cloud and on-premises environment sets financial services organizations up for success. Many organizations adopt cloud to achieve new innovation, agility, and process efficiency—benefits achieved only when your cloud infrastructure integrates, orchestrates, and relates all data, applications, and processes. Informatica’s next-gen iPaaS goes beyond application integration and data integration to address the growing complexity of data management required in a hybrid business.
- **Data privacy and protection:** The ability to automate discovery and classification of sensitive data across structured and unstructured sources, map sensitive data to business processes and regulations, and monitor use and proliferation will enable financial services companies to comply with the expanding number of data privacy regulations globally. With privacy by design principles, organizations can intelligently discover, identify, and protect sensitive information and ensure consent and ethical data processing.

Financial Services Leaders Turn to Informatica

A major Wall Street firm used Informatica Master Data Management (MDM) to integrate three customer contact systems and two organizational reference data systems into a single multi-domain hub, giving business users full visibility across multiple client databases for the first time. This gave the firm deeper insight into chargeable services and cross-sell and upsell opportunities while improving and coordinating customer responses.

A leading financial advisory firm used Informatica’s data privacy solution with Informatica’s data catalog solution to discover, classify, and protect customers’ personal data. It now uses a searchable dashboard of sensitive information to facilitate audits and maintenance, giving both clients and regulators the necessary proof that the firm is complying with data privacy laws.

A large US bank holding company used products and solutions across the Informatica Intelligent Data Platform to improve the quality, consistency, transparency, and accessibility of CCAR compliance data. Informatica enabled them to automate more than 3,000 data quality rules, integrate data from more than 50 systems into their enterprise risk data warehouse, and support end-to-end data lineage information to accurately respond to regulator questions about their risk report submissions.

About Informatica

Digital transformation changes expectations: better service, faster delivery, with less cost. Businesses must transform to stay relevant and data holds the answers.

As the world's leader in Enterprise Cloud Data Management, we're prepared to help you intelligently lead—in any sector, category, or niche. Informatica provides you with the foresight to become more agile, realize new growth opportunities, or create new inventions. With 100% focus on everything data, we offer the versatility needed to succeed.

We invite you to explore all that Informatica has to offer—and unleash the power of data to drive your next intelligent disruption.

A large US insurance company used products and services across the Informatica Intelligent Data Platform to migrate critical business data from its old customer service and sales platform to Salesforce.com. Informatica enabled the firm to finish the migration in weeks rather than months, generating significant cost savings while speeding customer service and raising customer satisfaction scores.

Next Steps

Informatica provides the automation and innovation across multi-cloud and on-premises environments required to support financial services organizations. Serving the global financial services industry for more than 25 years, including most of the top 25 global banks, the top 30 US banks, and the top 50 Property and Casualty (P&C) insurance companies, Informatica helps you unleash the power and value of all data.

Learn more at <https://www.informatica.com/solutions/industry-solutions/banking-and-capital-markets.html>



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