

May 25, 2021

# Creating Accelerated Value for Customers

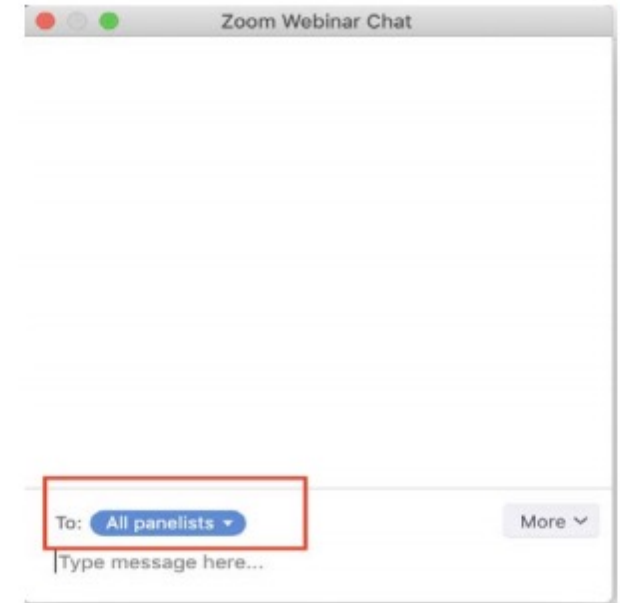
Abhay Jacob, Manager

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# Housekeeping Tips



- Today's Webinar is scheduled to last **1 hour including Q&A**
- All dial-in participants will be muted to enable the speakers to present without interruption
- Questions can be submitted to "All Panelists" via the **Chat option** and we will respond at the end of the presentation
- The webinar is **being recorded** and will be available to view on our **INFASupport YouTube channel**. The link will be emailed as well.
- Please take time to complete the **post-webinar survey** and provide your feedback and suggestions for upcoming topics.



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# Safe Harbor

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# Creating Accelerated Value for Customers

1

Background

2

Understand  
Customer Trends

3

Accelerate First  
Time to Value

4

High Value Use  
Case Selection

5

Implementation  
Planning

6

Q&A

May 2021

# Creating Accelerated Value for Customers

Rebecca South

*Sr Consultant, Data Governance*



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# Accelerated Customer Value = Shortened First Time to Value

- Analyze Customer trends and patterns
  - Industry and product selection
  - Common pain points and use cases
  - Prioritized capabilities and features
- Accelerate First Time to Value
  - High value use cases
  - Implementation plan
  - Repeatable experience
  - Demonstrate ROI



# Onboarding Projects by Industry



Healthcare

23%



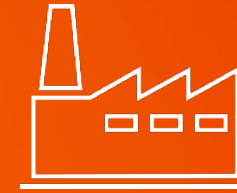
Financial  
Services

18%



Business  
Services

14%



Manufacturing

14%



Membership  
Services

14%

Axon  
+  
EDC

60%

50%

100%

66%

100%

Timeframe: April 2020 – April 2021

# Collective Pain Points Across Customers

Lack of a central repository for standard definitions of key data elements or metrics

Silo information or “tribal knowledge” prevents self discovery

Lack of visibility to usage of data and impact of data changes

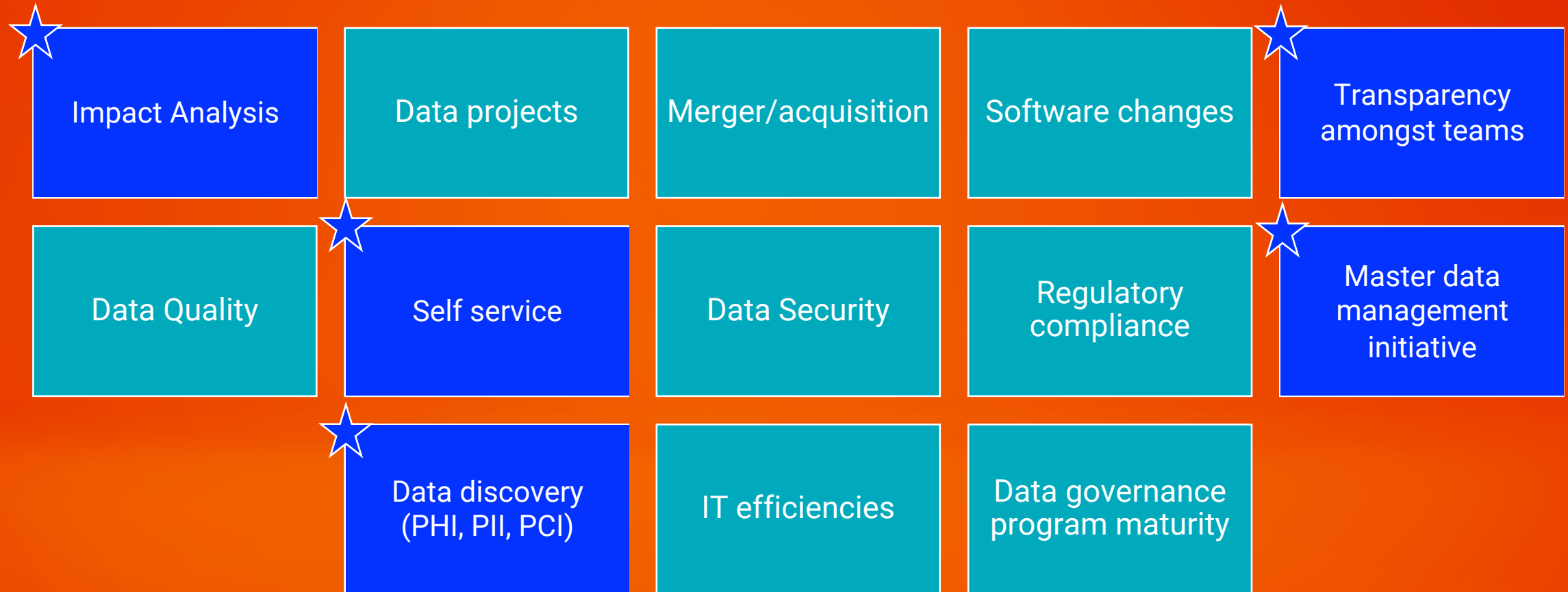
Lack of visibility to where sensitive data resides

Large manual efforts to catalog assets in MDM projects



# Most Common Business Challenges

Business challenge themes that drive initial focus as Onboarding Projects



Timeframe: April 2020 – April 2021

# High Value Features and Capabilities

Three capabilities emerged as having high value and delivering quick wins



## **Self Discovery:**

Locate a key data element, understand standard definition, see its point of origin



## **Accelerate Knowledge & Impact Analysis:**

Discover how a key data element is used across reports and systems



## **Domain Discovery:**

Classify and detect PII / PHI / PCI data elements in physical assets

# Most Common KPIs

## Operational Efficiencies

- Reduction in manual effort to catalog data sources (80%)
- Reduction in time to locate data for analytics (50%)
- Reduction in emails, time spent answering questions (50-70%)
- Reduction in time to find Sensitive data



# Use Case and Capability Trends by Industry

	<u>Challenges</u>	+	<u>Subject Area</u>	+	<u>Capability</u>	+	<u>Features</u>
 Healthcare	Data Discovery Master Data Initiatives		Customer PII/PHI		Standard Definitions Accelerated Understanding		Glossary Datasets Stakeholders
 Financial Services	Data Discovery Master Data Initiatives		Customer PII/PCI		Accelerated Understanding Progressively Build Lineage		Glossary Lineage
 Business Services	Self Service Master Data Initiatives		Customer PII		Accelerated Understanding Progressively Build Lineage		Glossary Attributes Lineage
 Manufacturing	Impact Analysis		Product		Accelerated Understanding Progressively Build Lineage		Glossary Stakeholders Lineage
 Membership Services	Transparency across Teams		Customer PII/PCI  Product		Standard Definitions Progressively Build Lineage		Glossary Policy Lineage

Timeframe: April 2020 – April 2021



# Accelerate First Time to Value

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High Value Use Case

Implementation Plan

Measure Outcomes



# Identify a Business Challenge for a Quick Win

Most common scenarios that drove pilot project selection



Relevant in day-to-day setting

- Current Reporting
- Current Processes



Addresses an emerging issue

- Regulatory Concerns
- Data Quality Issues



Complaints commonly overheard

- Tribal Knowledge
- Inconsistent Definitions
- Visibility to Data Sources



Subject area already on governance path

- Defined Subject Areas
- Defined Policies

# Implementation Planning

Developing a standard, repeatable Playbook saves time in each pilot



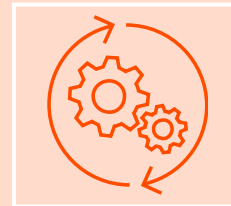
Aim for an Aha!  
moment



Create clear paths to  
completion and show  
progress



Create an onboarding  
guide



Friction-free as  
possible

# Best Practice Examples

Self Discovery: Locate a key data element, understand standard definition, see its point of origin



## The Aha! Moment:

1. Identify a target Persona
2. What feature(s) will solve a current pain point?

- A) Glossary Term with accurate definition, business logic
- B) Connected to source report or dataset
- C) View conceptual and/or physical lineage to source

## Onboarding Guide:

1. Checklist of required features
2. Create a sequence of steps

Axon

- ✓ Org Unit
- ✓ People
- ✓ Glossary
- ✓ System
- ✓ Dataset
- ✓ Attribute x Attribute

EDC

- ✓ Profiling
- ✓ Domain Discovery
- ✓ Business Term Association
- ✓ Table Certification

## Keeping Friction-Free:

1. Admin Training
2. Feature Testing

Axon

- ✓ Admins Identified
- ✓ Admin Training
- ✓ KDEs & System Inventory

EDC

- ✓ Admins Identified
- ✓ Admin Training
- ✓ Resource Inventory
- ✓ Verify Domain Discovery, Business Term Association

# Ways to Demonstrate the Value

Showcasing the benefits of the pilot project is an important factor to accelerate business adoption

## High Value Outcomes

1

Highlight the problem  
this solution will solve

*Silo information or “tribal knowledge”  
prevents self discovery*

*Lack of a central repository for standard  
definitions of key data elements or  
metrics*

2

Showcase features that  
solve the problem

*Central Glossary for Self Service*

*Standard definition eliminates confusion  
and questions*

*Quick identification of Glossary Owner*

*Key Data Elements (KDE) connected to  
Physical assets for data discovery*

3

Tie the use case back to  
quantifiable benefits

*Eliminated 80% of email traffic*

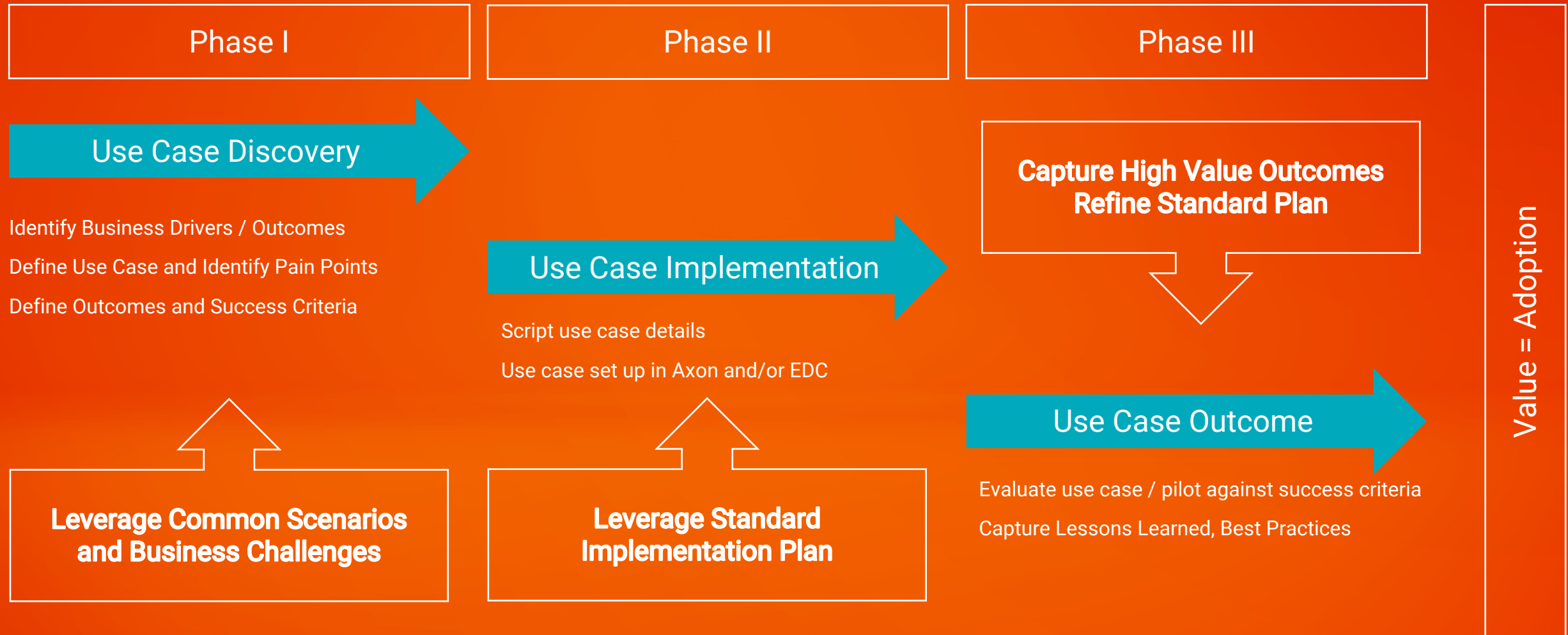
*Reduced data discovery phase by 80%*

*Reduced mis-use of KDE by 90%*

*Standard definitions for 50% of KDE's*

# Accelerated Time to Value

Shorten the Discovery Window, Implementation Time, Time to Realized Value





Q&A

# We're Ready to Help!

## Different ways we can help

- Follow up Sessions
- Technical and Business Workshops
- Assessments
- Customized Engagements
- Technical and Business Advisors
- Implementation Support

For follow up and additional questions, please reach out to:

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