15 Sep, 2020

MDM-Business 360 Strategy for CRM

Kamal Abrol
Customer Success Technologist

Housekeeping Tips

- Today’s Webinar is scheduled for 1 hour
- The session will include a webcast and then your questions will be answered live at the end of the presentation
- All dial-in participants will be muted to enable the speakers to present without interruption
- Questions can be submitted to “All Panelists" via the Q&A 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 and Success Portal. 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.

Feature Rich Success Portal

Bootstrap trial and POC Customers

Enriched Customer Onboarding experience

Product Learning Paths and Weekly Expert Sessions

Informatica Concierge with Chatbot integrations

Tailored training and content recommendations

Informatica

More Information

Success Portal

https://success.informatica.com

Communities & Support

https://network.informatica.com

Documentation

https://docs.informatica.com

University

https://www.informatica.com/in/services-and-training/informatica-university.html

Safe Harbor

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Statements made today are based on currently available information, which is subject to change. Such statements should not be relied upon as a representation, warranty or commitment to deliver specific products or functionality in the future.

Agenda

- Business challenges- CRM
- Build effective Customer Data Strategy
- How operationalizing MDM can accelerate your business processes
- Use Case- Publish data from MDM to Salesforce
- MDM integration with IICS-CAI
- Live Accelerator Demo –MDM-Business 360 for CRM

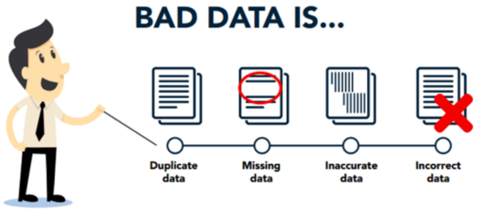
Informatica™

Cracks in the CRM solution

❖ **Fragmented info across apps**

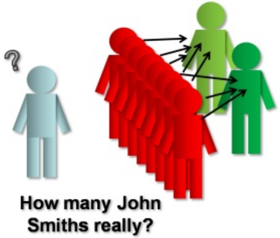
GET RID OF
DATA SILOS

❖**Incomplete Archaic Data**


BAD DATA IS...
Duplicate data
Missing data
Inaccurate data
Incorrect data

❖**Many Enterprise have multiple CRM's**

❖ **Duplicate or multiple Versions of same customer**


?
How many John
Smiths really?

❖ **Mergers & Acquisition migration Gotcha**

CRM-What is getting in the way…

Why can’t I get **clean and consistent** customer information?

Bad Data

Data quality problems cost U.S. businesses more than **$600 billion a year.**

Source: TDWI

Why can’t I see our **customers’ total relationship** with the company?

Data Silos

95% of enterprise data is unusable because it’s not integrated.

Source: Forrester

Why can’t I access **all customer transactions and interactions**?

Poor visibility

Median Fortune 1000 company could **boost revenue by $2.01B** by increasing data usability 10%.

Source: University of Texas

Informatica™

Valuable **information** changes and degrades….

5,769 people
change jobs

2,748 people
change address

515 people
get married

263 people
get divorced

186 people
declare
bankruptcy

Data Degrades
27% per year

61% in 2 years

104% in 3 years!

240 companies
change addresses

150 companies
change numbers

12 companies
open their doors

20 companies
close their doors

4 companies
change names

112
executives
change jobs

Source: D&B, US Census Bureau, US Department of Health and Human Services, Administrative Office of the US Courts, Bureau of Labor Statistics, Gartner, A.T Kearney, GMA Invoice Accuracy Study

Business challenges- CRM

Build effective Customer Data Strategy

How operationalizing MDM can accelerate your business processes

Use Case- Publishing data from MDM to Salesforce

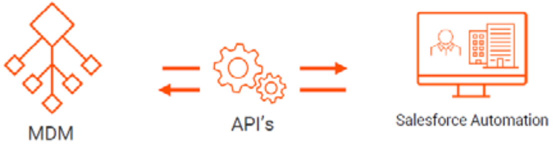
MDM integration with IICS-CAI

Live Accelerator Demo –MDM-Business 360 for CRM

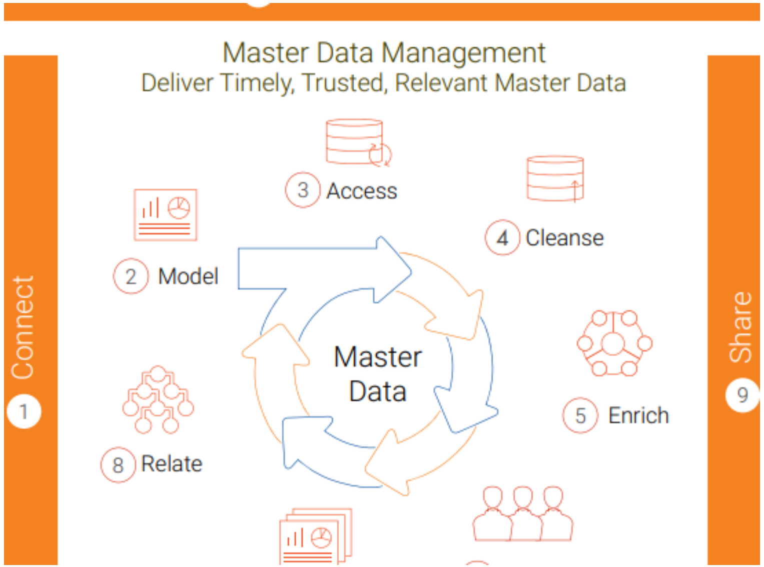
CRM+MDM Strategy

Advantages of CRM & MDM Strategy

- MDM provides a trusted CRM environment
- MDM consolidates and provides the best of breed data
- Customer information that is reliable
- MDM improves the overall Data Quality of the CRM
- MDM provides Hierarchy management and integration into CRM

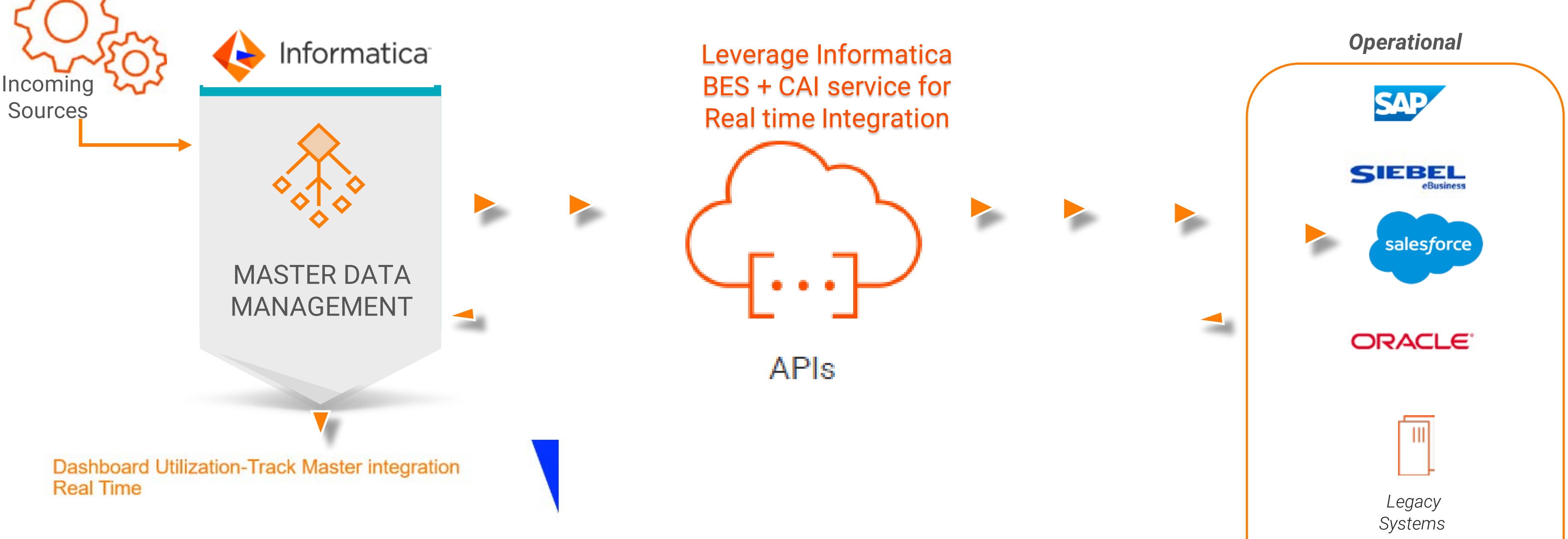

MDM
API's
Salesforce Automation

Fuel CRM with Trusted Data Insights- Informatica MDM

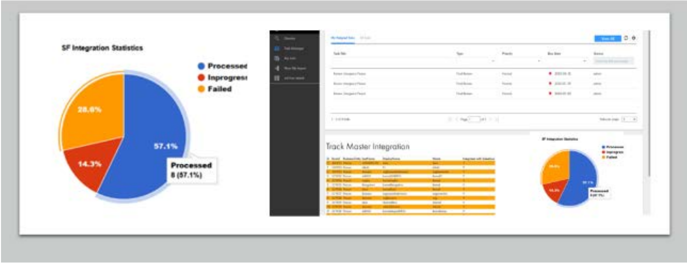

Master Data Management
Deliver Timely, Trusted, Relevant Master Data
3 Access
4 Cleanse
2 Model
Master Data
5 Enrich
8 Relate
Connect
1
Share
9

- Business challenges- CRM
- Build effective Customer Data Strategy
- How operationalizing MDM can accelerate your business processes
- Use Case- Publishing data from MDM to Salesforce
- MDM integration with IICS-CAI
- Live Accelerator Demo –MDM-Business 360 for CRM

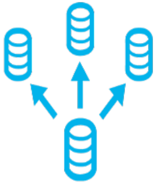
Live after Go Live –Operationalizing your MDM Implementation


Incoming Sources
Informatica
MASTER DATA MANAGEMENT
Leverage Informatica BES + CAI service for Real time Integration
APIs
Operational
SAP
SIEBEL eBusiness
salesforce
ORACLE
Legacy Systems

Dashboard Utilization-Track Master integration Real Time


SF Integration Statistics
Processed
Inprogress
Failed
28.6%
57.1%
14.3%
Processed
8 (57.1%)
Track Master Integration

Operationalizing your MDM Implementation(Cont)



- **Maximize extensibility to new applications(CRM's) & data sources**

Onboard more data sources(CRM's) which can be integrated with MDM and "best of breeds" consolidated data can finally be pushed to downstream applications for trusted insights

Cross-selling

•**Customer Experience**

Determine next best action for customers delivering state of art experience from consolidated accurate data obtained from multiple CRM's and on demand accessible via BES Api's.

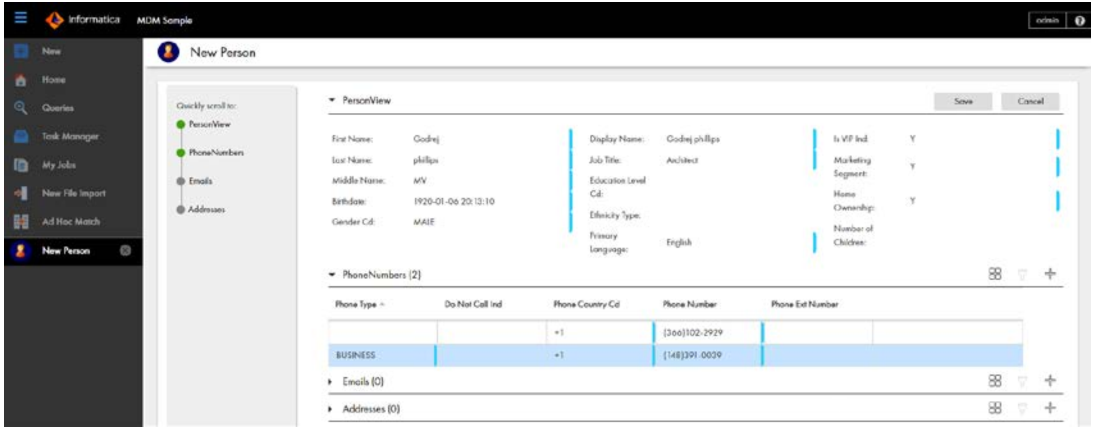
THIS YEAR
ROI
+83.0
+41.9
+22.6
+10.3
+12.0

•**Achieve high ROI in early phases**

Continuous outbound integration with MDM ensures its everlasting stickiness by maintaining best of breed data from multiple sources and can be used to fuel analytics on demand and deliver trusted data to right executives at right time.

Demo

Use Case- MDM Real time integration with Salesforce


Informatica
MDM Sample
admin
New
Home
Queries
Task Manager
My Jobs
New File Import
Ad Hoc Match
New Person
Save
Cancel

New Person

Quickly scroll to:
- PersonView
- PhoneNumbers
- Emails
- Addresses

PersonView

First Name: Godrej
Last Name: phillips
Middle Name: MV
Birthdate: 1920-01-06 20:13:10
Gender Cd: MALE
Display Name: Godrej phillips
Job Title: Architect
Education Level Cd:
Ethnicity Type:
Primary Language: English
Is VIP Ind: Y
Marketing Segment: Y
Home Ownership: Y
Number of Children:

PhoneNumbers (2)

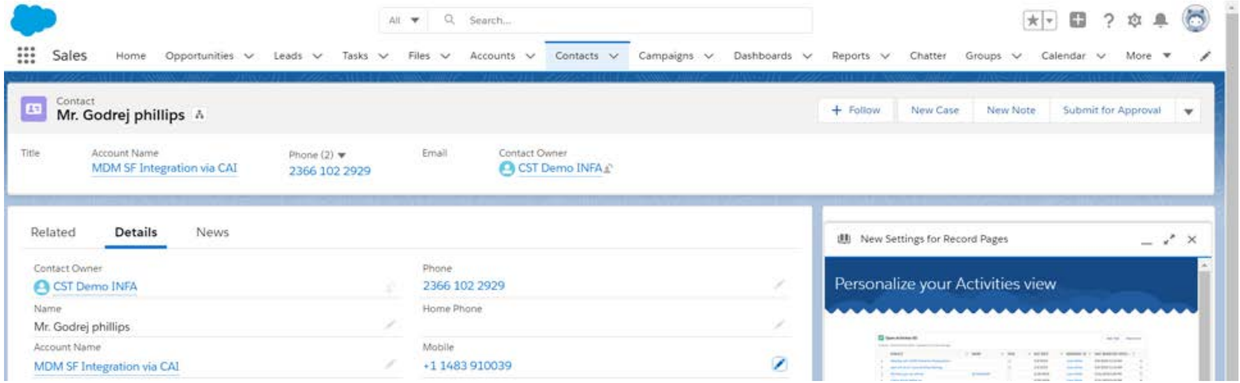
Phone Type	Do Not Call Ind	Phone Country Cd	Phone Number	Phone Ext Number
		+1	(366)102-2929	
BUSINESS		+1	(148)391-0039	

Emails (0)

Addresses (0)

MDM Entity 360

API- Business Entity Services

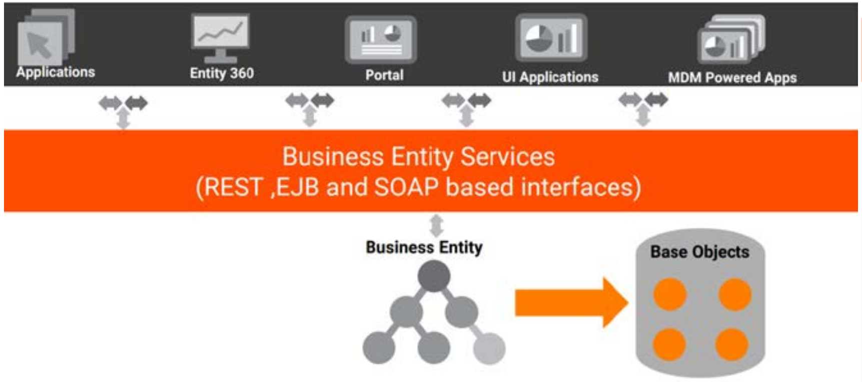

All
Search...
Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Campaigns
Dashboards
Reports
Chatter
Groups
Calendar
More
Follow
New Case
New Note
Submit for Approval
Related
Details
News
New Settings for Record Pages
Personalize your Activities view

Contact
Mr. Godrej phillips

Title
Account Name: MDM SF Integration via CAI
Phone (2): 2366 102 2929
Email
Contact Owner: CST Demo INFA

Contact Owner: CST Demo INFA
Name: Mr. Godrej phillips
Account Name: MDM SF Integration via CAI
Phone: 2366 102 2929
Home Phone
Mobile: +1 1483 910039

API- Business Entity Services &Types



Business Entity Services
(REST ,EJB and SOAP based interfaces)

Metadata

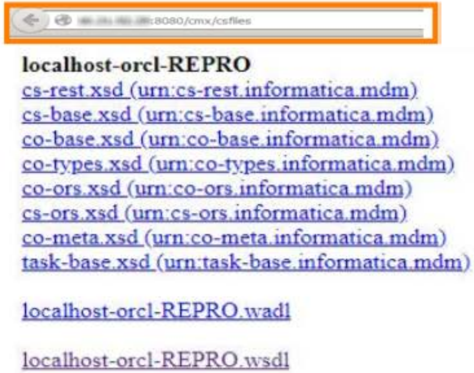
- Get Business Entity Metadata
- Get Business Process Management (BPM) Metadata

Business Entities

- CRUD
- Smart Search, Suggester
- Preview Merge
- Get Related
- Read, Update, Delete Matched

Tasks

- CRUD
- Promote, Complete
- Execute Action



[redacted]:8080/cmx/csfiles

localhost-orcl-REPRO
cs-rest.xsd (urn:cs-rest.informatica.mdm)
cs-base.xsd (urn:cs-base.informatica.mdm)
co-base.xsd (urn:co-base.informatica.mdm)
co-types.xsd (urn:co-types.informatica.mdm)
co-ors.xsd (urn:co-ors.informatica.mdm)
cs-ors.xsd (urn:cs-ors.informatica.mdm)
co-meta.xsd (urn:co-meta.informatica.mdm)
task-base.xsd (urn:task-base.informatica.mdm)

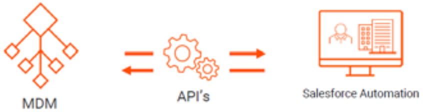
localhost-orcl-REPRO.wadl

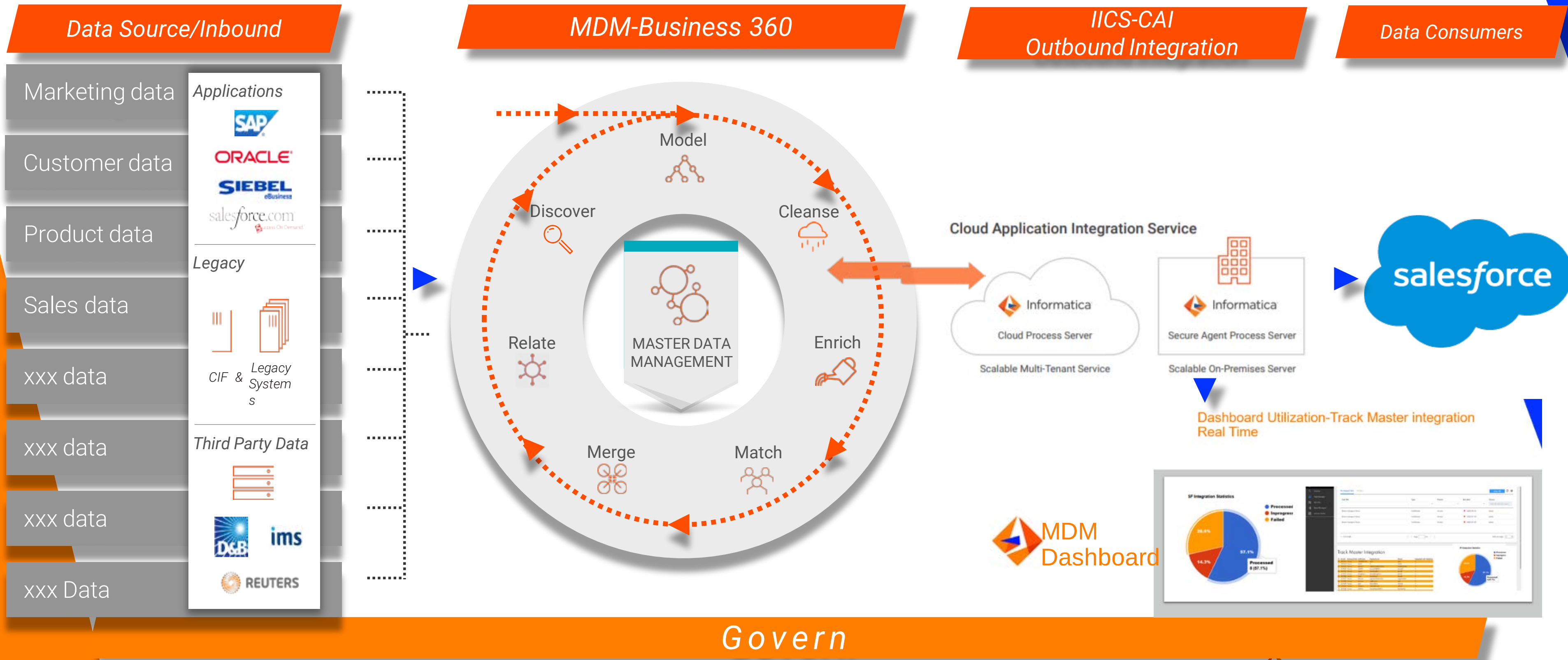
localhost-orcl-REPRO.wsdl

SOAP URL (request in SOAP):
http://localhost:8080/cmx/services/BEServices/localhost-orcl-DS_UI1

REST URL: http://localhost:8080/cmx/cs/localhost-orcl-DS_UI1/Person?action=meta

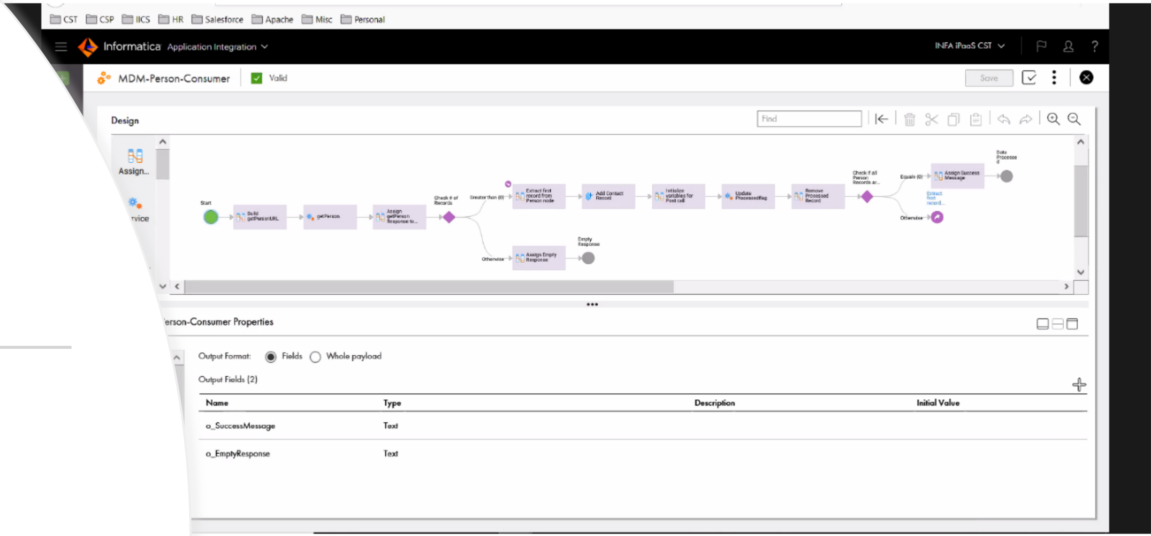
Informatica MDM for Salesforce Accelerator


MDM
API's
Salesforce Automation


Data Source/Inbound
MDM-Business 360
IICS-CAI
Outbound Integration
Data Consumers
Marketing data
Customer data
Product data
Sales data
xxx data
xxx data
xxx data
xxx Data
Applications
SAP
ORACLE
SIEBEL eBusiness
salesforce.com
Legacy
CIF & Legacy Systems
Third Party Data
D&B
ims
REUTERS
Model
Cleanse
Enrich
Match
Merge
Relate
Discover
MASTER DATA MANAGEMENT
Cloud Application Integration Service
Informatica
Cloud Process Server
Scalable Multi-Tenant Service
Informatica
Secure Agent Process Server
Scalable On-Premises Server
salesforce
Dashboard Utilization-Track Master integration Real Time
MDM Dashboard
SF Integration Statistics
Processed
Inprogress
Failed
Track Master Integration
Govern

Informatica

IICS CAI based Integration


CST
CSP
IICS
HR
Salesforce
Apache
Misc
Personal
Informatica Application Integration
INFA iPaaS CST
Save
Design
Find
Assign...
rvice
Start
Build getPersonURL
getPerson
Assign getPerson Response to...
Check # of Records
Greater than (0)
Extract first record from Person node
Add Contact Record
Initialize variables for Post call
Update Processedflag
Remove Processed Record
Check if all Person Records ar...
Equals (0)
Assign Success Message
Data Processed
Extract first record...
Otherwise
Otherwise
Assign Empty Response
Empty Response

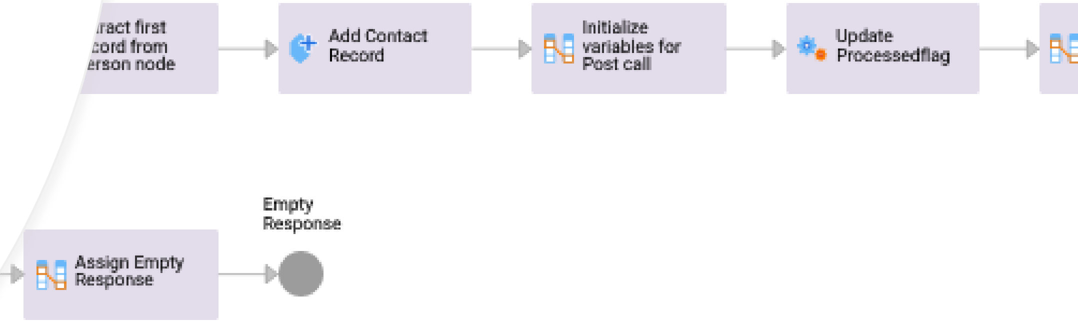
MDM-Person-Consumer ☑ Valid

'erson-Consumer Properties

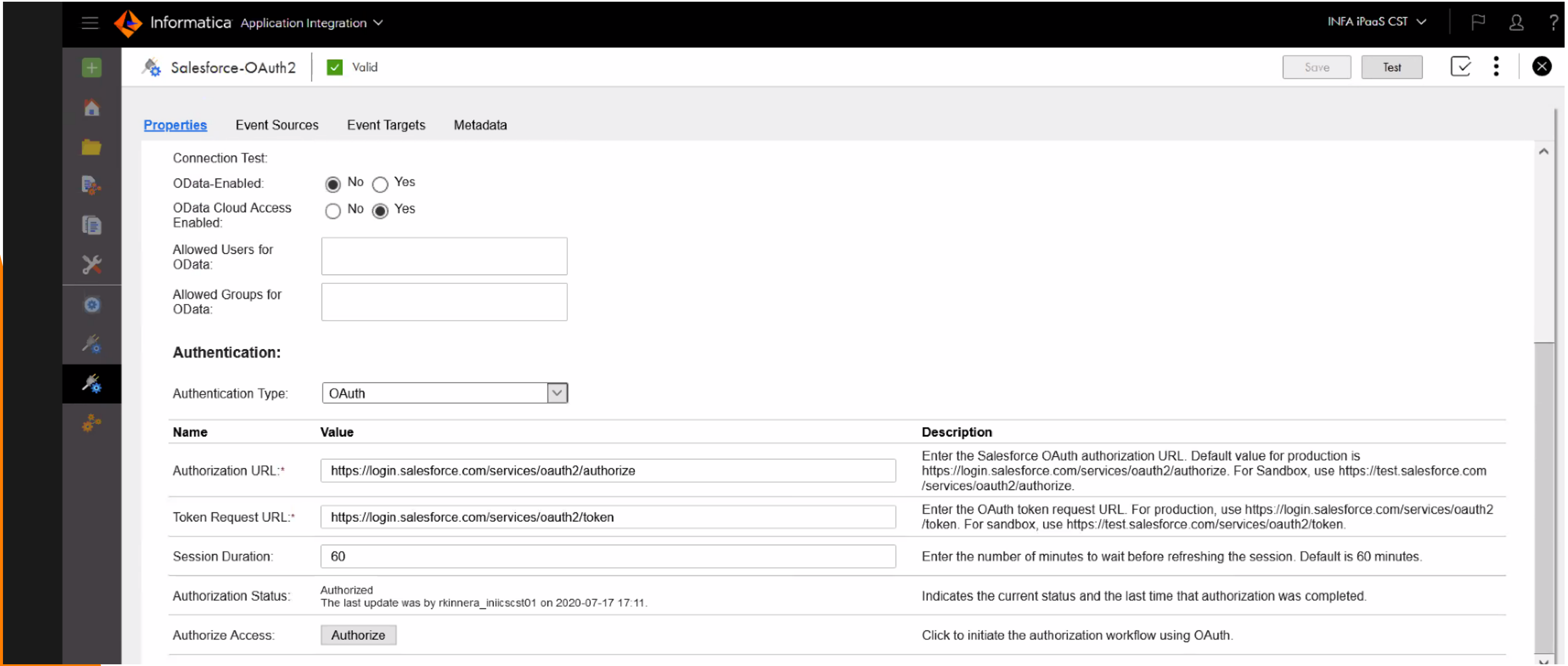
Output Format: ● Fields ○ Whole payload

Output Fields (2)

Name	Type	Description	Initial Value
o_SuccessMessage	Text		
o_EmptyResponse	Text		


ract first
cord from
erson node
Add Contact Record
Initialize variables for Post call
Update Processedflag
Empty Response
Assign Empty Response

OAuth based Authentication mechanism


Informatica Application Integration
INFA iPaaS CST
Salesforce-OAuth2
☑ Valid
Save
Test
Properties
Event Sources
Event Targets
Metadata

Connection Test:

OData-Enabled: ● No ○ Yes

OData Cloud Access Enabled: ○ No ● Yes

Allowed Users for OData:

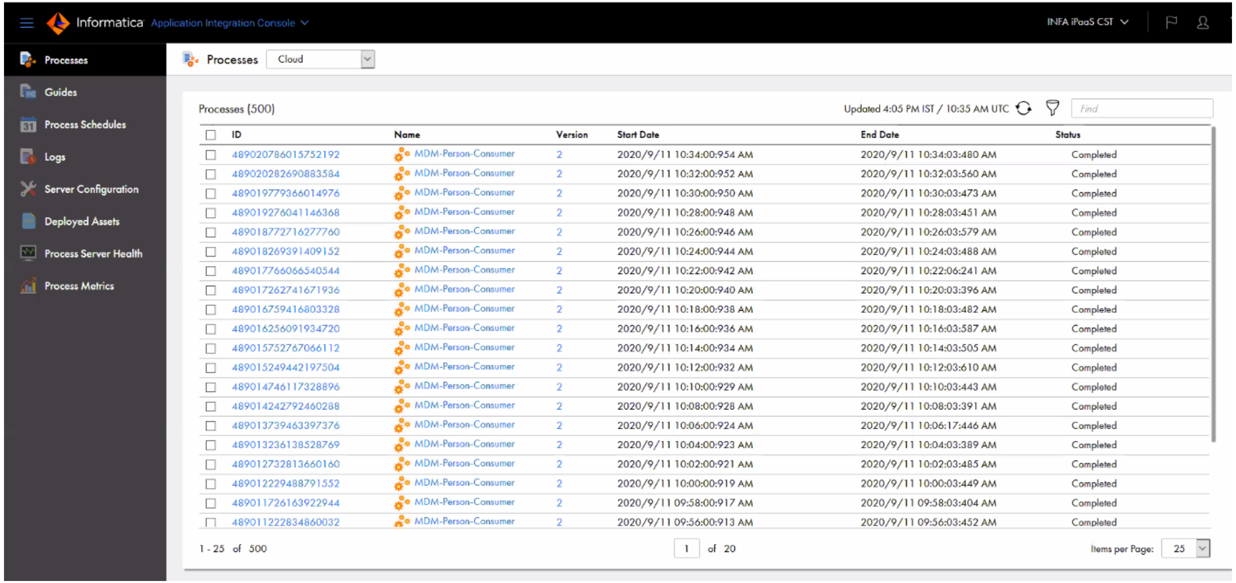
Allowed Groups for OData:

Authentication:

Authentication Type: OAuth

Name	Value	Description
Authorization URL:*	https://login.salesforce.com/services/oauth2/authorize	Enter the Salesforce OAuth authorization URL. Default value for production is https://login.salesforce.com/services/oauth2/authorize. For Sandbox, use https://test.salesforce.com/services/oauth2/authorize.
Token Request URL:*	https://login.salesforce.com/services/oauth2/token	Enter the OAuth token request URL. For production, use https://login.salesforce.com/services/oauth2/token. For sandbox, use https://test.salesforce.com/services/oauth2/token.
Session Duration:	60	Enter the number of minutes to wait before refreshing the session. Default is 60 minutes.
Authorization Status:	Authorized The last update was by rkinnera_iniicscst01 on 2020-07-17 17:11.	Indicates the current status and the last time that authorization was completed.
Authorize Access:	Authorize	Click to initiate the authorization workflow using OAuth.

IICS-CAI services execution schedule

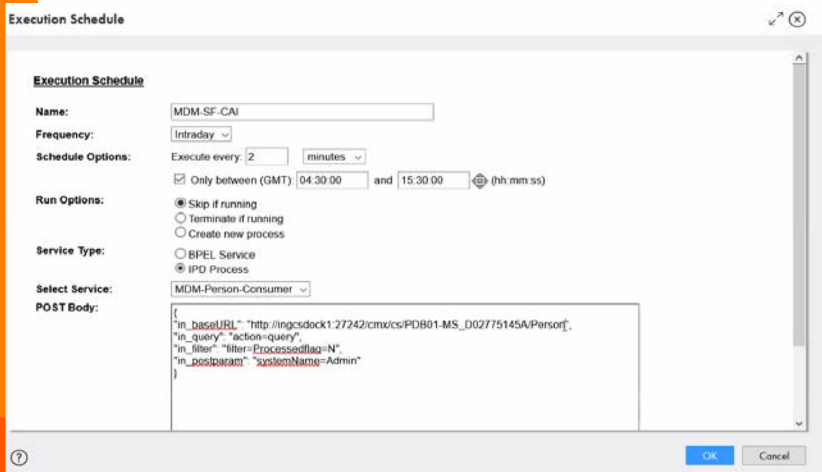


Processes (500)

Updated 4:05 PM IST / 10:35 AM UTC

☐	ID	Name	Version	Start Date	End Date	Status
☐	489020786015752192	MDM-Person-Consumer	2	2020/9/11 10:34:00:954 AM	2020/9/11 10:34:03:480 AM	Completed
☐	489020282690883584	MDM-Person-Consumer	2	2020/9/11 10:32:00:952 AM	2020/9/11 10:32:03:560 AM	Completed
☐	489019779366014976	MDM-Person-Consumer	2	2020/9/11 10:30:00:950 AM	2020/9/11 10:30:03:473 AM	Completed
☐	489019276041146368	MDM-Person-Consumer	2	2020/9/11 10:28:00:948 AM	2020/9/11 10:28:03:451 AM	Completed
☐	489018772716277760	MDM-Person-Consumer	2	2020/9/11 10:26:00:946 AM	2020/9/11 10:26:03:579 AM	Completed
☐	489018269391409152	MDM-Person-Consumer	2	2020/9/11 10:24:00:944 AM	2020/9/11 10:24:03:488 AM	Completed
☐	489017766066540544	MDM-Person-Consumer	2	2020/9/11 10:22:00:942 AM	2020/9/11 10:22:06:241 AM	Completed
☐	489017262741671936	MDM-Person-Consumer	2	2020/9/11 10:20:00:940 AM	2020/9/11 10:20:03:396 AM	Completed
☐	489016759416803328	MDM-Person-Consumer	2	2020/9/11 10:18:00:938 AM	2020/9/11 10:18:03:482 AM	Completed
☐	489016256091934720	MDM-Person-Consumer	2	2020/9/11 10:16:00:936 AM	2020/9/11 10:16:03:587 AM	Completed
☐	489015752767066112	MDM-Person-Consumer	2	2020/9/11 10:14:00:934 AM	2020/9/11 10:14:03:505 AM	Completed
☐	489015249442197504	MDM-Person-Consumer	2	2020/9/11 10:12:00:932 AM	2020/9/11 10:12:03:610 AM	Completed
☐	489014746117328896	MDM-Person-Consumer	2	2020/9/11 10:10:00:929 AM	2020/9/11 10:10:03:443 AM	Completed
☐	489014242792460288	MDM-Person-Consumer	2	2020/9/11 10:08:00:928 AM	2020/9/11 10:08:03:391 AM	Completed
☐	489013739463397376	MDM-Person-Consumer	2	2020/9/11 10:06:00:924 AM	2020/9/11 10:06:17:446 AM	Completed
☐	489013236138528769	MDM-Person-Consumer	2	2020/9/11 10:04:00:923 AM	2020/9/11 10:04:03:389 AM	Completed
☐	489012732813660160	MDM-Person-Consumer	2	2020/9/11 10:02:00:921 AM	2020/9/11 10:02:03:485 AM	Completed
☐	489012229488791552	MDM-Person-Consumer	2	2020/9/11 10:00:00:919 AM	2020/9/11 10:00:03:449 AM	Completed
☐	489011726163922944	MDM-Person-Consumer	2	2020/9/11 09:58:00:917 AM	2020/9/11 09:58:03:404 AM	Completed
☐	489011222834860032	MDM-Person-Consumer	2	2020/9/11 09:56:00:913 AM	2020/9/11 09:56:03:452 AM	Completed

1 - 25 of 500 | 1 of 20 | Items per Page: 25



Execution Schedule

Name: MDM-SF-CAI

Frequency: Intraday

Schedule Options: Execute every: 2 minutes

☑ Only between (GMT): 04:30:00 and 15:30:00 (hh:mm:ss)

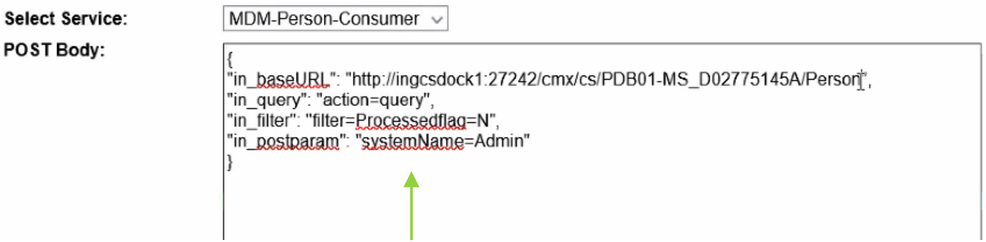
Run Options:
- ● Skip if running
- ○ Terminate if running
- ○ Create new process

Service Type:
- ○ BPEL Service
- ● IPD Process

Select Service: MDM-Person-Consumer

POST Body:

```
{
"in_baseURL": "http://ingcsdock1:27242/cmx/cs/PDB01-MS_D02775145A/Person",
"in_query": "action=query",
"in_filter": "filter=Processedflag=N",
"in_postparam": "systemName=Admin"
}
```



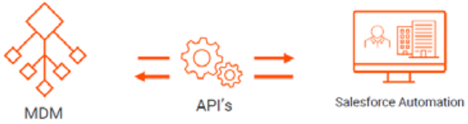
Select Service: MDM-Person-Consumer

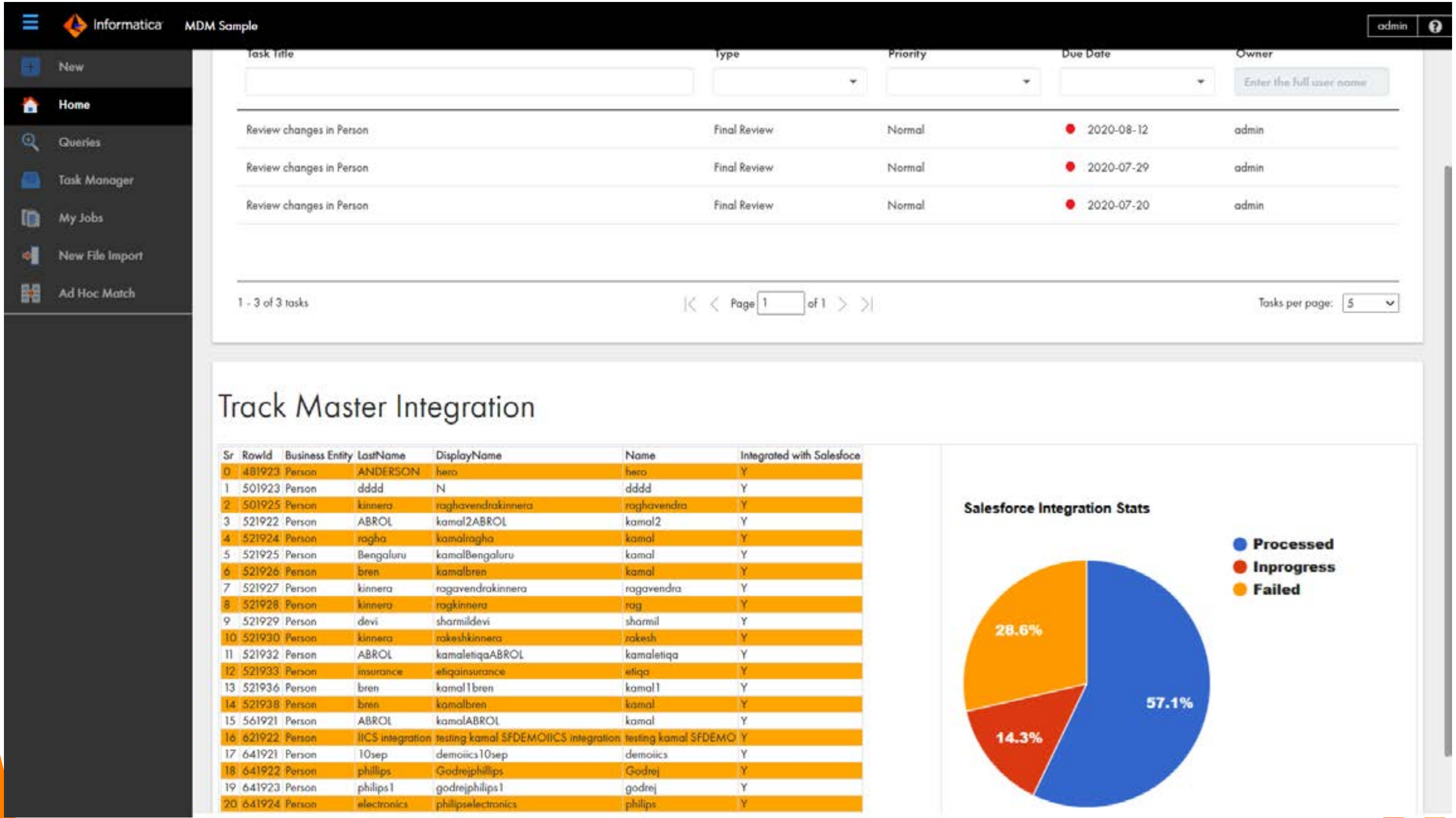
POST Body:

```
{
"in_baseURL": "http://ingcsdock1:27242/cmx/cs/PDB01-MS_D02775145A/Person",
"in_query": "action=query",
"in_filter": "filter=Processedflag=N",
"in_postparam": "systemName=Admin"
}
```

BES api sample

Dashboard Utilization-Track master integration in real time


MDM
API's
Salesforce Automation


Informatica
MDM Sample
admin
New
Home
Queries
Task Manager
My Jobs
New File Import
Ad Hoc Match
Enter the full user name
Page 1 of 1
Tasks per page: 5

Task Title	Type	Priority	Due Date	Owner
Review changes in Person	Final Review	Normal	● 2020-08-12	admin
Review changes in Person	Final Review	Normal	● 2020-07-29	admin
Review changes in Person	Final Review	Normal	● 2020-07-20	admin

1 - 3 of 3 tasks

Track Master Integration

Sr	RowId	Business Entity	LastName	DisplayName	Name	Integrated with Salesfoce
0	481923	Person	ANDERSON	hero	hero	Y
1	501923	Person	dddd	N	dddd	Y
2	501925	Person	kinnera	raghavendrakinnera	raghavendra	Y
3	521922	Person	ABROL	kamal2ABROL	kamal2	Y
4	521924	Person	ragha	kamalragha	kamal	Y
5	521925	Person	Bengaluru	kamalBengaluru	kamal	Y
6	521926	Person	bren	kamalbren	kamal	Y
7	521927	Person	kinnera	ragavendrakinnera	ragavendra	Y
8	521928	Person	kinnera	ragkinnera	rag	Y
9	521929	Person	devi	sharmildevi	sharmil	Y
10	521930	Person	kinnera	rakeshkinnera	rakesh	Y
11	521932	Person	ABROL	kamaletiqaABROL	kamaletiqa	Y
12	521933	Person	insurance	etiqainsurance	etiqa	Y
13	521936	Person	bren	kamal1bren	kamal1	Y
14	521938	Person	bren	kamalbren	kamal	Y
15	561921	Person	ABROL	kamalABROL	kamal	Y
16	621922	Person	IICS integration	testing kamal SFDEMOIICS integration	testing kamal SFDEMO	Y
17	641921	Person	10sep	demoiics10sep	demoiics	Y
18	641922	Person	phillips	Godrejphillips	Godrej	Y
19	641923	Person	philips1	godrejphilips1	godrej	Y
20	641924	Person	electronics	phillipselectronics	philips	Y

Salesforce Integration Stats
Processed
Inprogress
Failed
28.6%
57.1%
14.3%

“CRM leaders must understand the benefits of the MDM discipline to CRM and make it part of their CRM strategy. MDM is critical to enabling CRM leaders to create the 360-degree view of the customer required for an optimized customer experience."

- Gartner

Using Informatica for MDM is like using Salesforce for CRM

- Michael Eggers, Head of Sales Operations, Amazon Web Services (AWS)

Questions?

?

Kamal Abrol-Speaker
Ragavendra Kinnera- IICS Panelist
Customer Success Technologist

Thank You!

- Customer Success Technologist