

BUILDING A 360 CUSTOMER VIEW WITH A MODERN DATA PLATFORM

360

degree view of customers

Impact

- 5 billion records are being managed, driving personalized marketing campaigns
- The solution is matching 14 different source systems, helping the data science team find trends across customers
- Ability to meet the requirements for transaction and interaction data that outnumber customer records by 2-200x

Informatica is the world’s leader in Enterprise Cloud Data Management. The company provides customers the foresight to become more agile, realize new growth opportunities, and create new inventions. In early 2019, Informatica acquired AllSight, next-generation Customer Data Platform provider, which helps enterprises use data to improve customer experiences through AI-enabled software focused on managing and improving customer intelligence.

The new **Informatica Customer 360 Insights** (formerly AllSight) solution extends Informatica’s market-leading Customer 360 and master data management (MDM) solutions and enables business and analytics users to drive richer, deeper, and longer-lasting customer relationships. As a next-generation customer data platform, Customer 360 Insights produces a broader, more connected and contextually relevant data set, the ability to plug in enterprise analytics, and serves up different confidence-based views for activation across marketing and analytics use cases.

This solution helps business users understand the context of customer behavior and intent through data. Informatica offers a comprehensive portfolio of customer data strategy solutions including Multi-domain MDM, Customer 360, Customer 360 Insights, Product 360, Supplier 360 and other industry-specific and cloud offerings.

Needing to become more customer-centric

Enterprises were encountering a challenge in having primarily account or product-centric views of their business. New demands to become more customer-centric led to the need to understand and serve customers in a more personalized and individual manner. MDM was a useful solution, but only gave a limited view of the customer base on core master data. With the advent of big data and the availability of digital interaction data, organizations struggled to incorporate this additional data into customer views. The ability to understand the customer fully with all available data and attributes presents the biggest opportunity for organizations aiming to become more customer-centric.

Building a 360-view of the customer

Informatica Customer 360 Insights (C360i) is a next-gen customer data platform that extends the Customer 360 view to include all data from all sources. In order to achieve this, Informatica has reimagined the capabilities necessary to match, link, store and visualize customer data with modern technology including AI, Machine Learning and Natural Language Processing. Deep customer insights are typically found in unstructured data from transactions, service requests, quotes, as well as interactions throughout different channels (phone/email/webchat/store) and social interactions. With the focus on matching transaction and interaction data to trusted customer profiles, the expectation on data volume and scalability of the solution meant a new way to manage and store data was required.

A partnership with Cloudera provides the necessary enterprise data platform to securely process, store, and analyze all customer data.

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Zahid Naeem, VP of Product Development, Informatica

Typically, transaction and interaction data can outnumber customer records by 2-200 times, dramatically increasing requirements. Cludera's Enterprise Data Cloud platform delivers the necessary technologies to address these requirements. Here are some examples:

- MapReduce (M/R) and Spark provide the perfect containers for holding all processing logic, be it data ingestion, matching, indexing, enrichment, AI or machine learning. These components offer the ultimate scalability to handle the vastly diverse data sets from client to client and use case to use case and allowed the Informatica R&D team to focus solely on the business logic for Customer 360 without having to worry about the scalability concerns.
- HBase provides the well-integrated and scalable persistence data store, which is the core data store for Customer 360 source as well as processed data including the database behind its graph DB.
- The near-real-time or messaging related data flow scenarios are realized using Kafka.
- SQL interface into the enriched data is built on top of Hive and Impala. With data available in the SQL interface, it enables client teams to consume C360i data in a format and language they're already familiar with and continue to use the tools and systems of their choice.
- Cludera Manager provides effective management capabilities from initial set up to on-going management and monitoring. In some scenarios, notifications can be created to alert the team of critical events in the cluster.

Cludera also provides the necessary support to enable Informatica teams to help optimize the environment to client-specific scenarios. In some cases, this meant significant improvements in cluster performance and utilization and in other cases, it meant a stable and reliable cluster configuration.

Dell, a global electronics manufacturer, is one example of this partnership in action. The company has implemented two primary use cases, gaining a broader customer 360 view for sellers and account managers, and improving targeted marketing and global campaigns. With Informatica's solution running on top of the Cludera Data Platform, Dell's Global Marketing group is now able to bring data together from more than 40 different source systems that were previously disconnected. A total of 5 billion records are being managed. Now, these data insights are being used to drive personalized marketing campaigns, micro-segmentation and hyper-personalization. Dell's sales and services teams utilize Informatica's Customer 360 Insights for a self-service customer 360 dashboard that is embedded directly into Salesforce. Sellers can now directly access a broader 360 view of their customer accounts to help better manage expectations, identify where there might be issues, and for cross-sell/upsell opportunities.

Farmers Insurance, a global provider of insurance products, is also leveraging Informatica and Cludera on AWS to optimize the digital-to-personal experience. This solution is being used for an analytics use case, matching 14 different source systems, including MDM. The company started with trusted customer profiles from MDM and went a step further by adding additional attributes including quote history, webchat, NPS scores, among others. The interaction and transaction data was brought in and matched to core master records and served up through Hive tables for consumption by different analytical tools.

A leading Canadian bank, is leveraging these solutions on Microsoft Azure to drive marketing transformations. Its goal was to create a better customer experience through more personalized campaigns. The company valued the matching capabilities of Informatica for machine learning and natural language processing to automate the matching process and find difficult to match data. The bank didn't have a legacy MDM solution, so this matching technology enabled it to identify intelligent customer profiles to serve up to marketers for driving campaigns.