Informatica | **SulAmérica**

Insuring Success:

SulAmérica Consolidates Insurance Policy Data,
Personalizing Service Across Lines of Business

*"Informatica is supporting the acceleration
of our digital transformation, mitigating risks,
and enabling a more efficient operation in
today's insurance environment."*

José Guilherme Magalhães
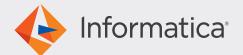Senior Manager for Analytics Architecture
SulAmérica

Goals	Solution	Results
Deliver a single, complete view of customers, brokers, and providers, gathering insurance policy information across all lines of business	Deploy Informatica MDM to consolidate CRM platforms and create a single version of truth for customer data from 17 source systems	Improves customer relationships with insights that enable more responsive service and strategic sales targeting while reducing risk and operational costs
Roll out this informational hub to be utilized by other operations including product systems, analytics, procurement, auditing, privacy, legal, and HR	Use Informatica Cloud Data Integration to integrate applications and data sources across on-premises and cloud	Helps streamline a BRL $3.2 billion acquisition of SulAmérica's automotive and other property-casualty business by Allianz
Enable developers to work with production data to improve quality, consistency, and compliance while protecting customers' information	Provision subsets of production data to test environments using Informatica Test Data Management to mask sensitive data	Allows for more consistent, high-quality software development while keeping customer data safe and complying with data protection regulations

Informatica Success Story: SulAmérica

As Brazil's largest independent insurance company, SulAmérica operates in a competitive, highly regulated industry known for its many alliances, consolidations, mergers, and acquisitions which over time have created some extremely large companies with multiple lines of commercial, personal, and health insurance.

Although it was established in 1895 as a life insurance company, SulAmérica has evolved and now offers a portfolio of insurance products that includes life, health, dental, and private pensions and asset management. With a large amount of sensitive data associated with each of these lines of business—including customer information, policy summaries, and analytical information—SulAmérica found itself with 17 disparate systems supporting product operations for these lines of business. Each product operation had its own version of the truth.

Operating with siloed customer and policy data was inefficient and created knowledge gaps within the company, as well as duplicate and sometimes inconsistent customer records. For example, a customer service representative processing a life insurance application might not have immediate insight into the fact that the customer was also an existing healthcare policyholder. Disconnects like these negatively impacted the customer experience and resulted in missed marketing opportunities for the company.

SulAmérica was also beginning a digital transformation and turned to Informatica and Salesforce, using cloud apps to support corporate growth and reduce IT costs. To increase marketing efficiency, enable new customer campaigns, and enhance customer service, SulAmérica needed to consolidate multiple CRM platforms to provide a single, complete view of customers, initially in Salesforce, based on trusted information pulled from all lines of business.

Identifying compliance opportunities

SulAmérica also wanted to optimize system performance and integrity when integrating data from different insurance functions and departments. Because system integration issues could lead to delays in patient authorizations for medical coverage, this was a particular concern for the company's health insurance business unit. Data integration is also key to SulAmérica's support of wellness programs and value-based care. To gain new insights, the insurer wanted to bring together information from all over the company to enhance and accelerate decision-making.

To drive digital transformation and agile development, SulAmérica needed to enable its developers to work directly with production data. However, to safeguard customers' personal information and comply with Lei Geral de Proteção de Dados (LGPD), Brazil's general data protection law, the data had to be de-identified and masked.
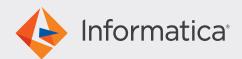
"We faced a variety of data-related challenges, from managing customer data to cloud integration to regulatory compliance," says José Guilherme Magalhães, Senior Manager for Analytics Architecture at SulAmérica. "We wanted a partner that could help us with all of these."

Aligning customer data across business units

SulAmérica began its journey by deploying Informatica MDM, an end-to-end master data management solution that includes an easy-to-use graphical interface. The solution pulls customer records from each business unit's source systems, deduplicates them, and creates a single golden record for each customer with an up-to-date, authoritative view of their insured and policy information. In SulAmérica's case, more than 20 percent of the company's 21 million total records turned out to be duplicates.

"Our first interactions with Informatica were around customer MDM, and we conducted a very thorough evaluation process involving other players," says Magalhães. "Informatica's results were very impressive. With Informatica MDM, our data is no longer segmented. We know which products a customer has, so we can have more informed conversations with our customers."

With Informatica MDM, SulAmérica now has a trusted, 360-degree view of customers across all lines of business. When sales representatives interact with customers through new channels like interactive voice response (IVR) and WhatsApp, SulAmérica can utilize customers' information to make their experiences consistent and relevant. As a result, SulAmérica can engage better with customers to help drive growth and differentiate the company in Brazil's insurance market through more personalized service. SulAmérica is also improving customer insights for enhanced segmentation and targeted selling, revealing more cross-sell and up-sell opportunities.

Having a single source of truth for customer data also helps SulAmérica to comply with LGPD, allowing the company to use customer data for analytics and sales campaigns while ensuring that all systems that access and update customer data align with the master source. Without Informatica MDM, it would not have been possible for SulAmérica to provide the needed customer information to the LGPD portal in a timely fashion.

"We are becoming a data-driven company, and that would not be possible without all of our business units having customer data that they can trust," says Bruno Moura, Data Engineering and Analytics Manager at SulAmérica. "Enhancing our interactions with customers is very important to us, so Informatica MDM was a natural first step in our transformation."
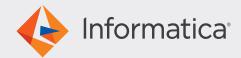
Streamlining the digital journey

SulAmérica set out to unify other systems across its environment, which includes an on-premises Oracle data warehouse as well as on-premises and cloud applications. It needed a flexible, agnostic, and cloud-native data integration solution that could easily connect to any common data source and offer high availability, particularly for critical health insurance integrations.

"We have many cloud initiatives as well as on-premises systems, and we wanted to standardize on an integration solution that would work with all of them," says Magalhães. "That's the primary reason we chose Informatica Intelligent Cloud Services. We run thousands of jobs per day, and we can use one tool instead of having to learn every platform's native integration tools."

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Data Engineering and Analytics Manager
SulAmérica

SulAmérica used Informatica Cloud Data Integration to connect its systems to a data lake hosted on Google Cloud, moving nearly 900TB into Google BigQuery for cloud analytics. Approximately 400 users including IT professionals, data scientists, and business analysts can access both raw and curated datasets, giving them a new platform for innovation.

"It would be incredibly difficult to tie together all our different datasets and get them into a cloud data lake without Informatica Cloud Data Integration," says Moura. "It's a huge step in our digital journey to build a new kind of health system."

Improving security and compliance

To empower its software developers to be more productive, SulAmérica uses Informatica Test Data Management. By provisioning subsets of production data and persistently masking the sensitive data fields, developers can work with real-world data without putting customer information unnecessarily at risk. The timing was excellent, as LGPD now makes such precautions mandatory for Brazilian companies.

"Informatica Test Data Management improves our development productivity and quality while protecting our customers' data and fulfilling an important new compliance mandate with LGPD," says Magalhães. "That's a lot of wins with a single solution."

Mitigating risk in a fast-changing industry

Moving forward, SulAmérica will deploy Informatica Enterprise Data Catalog to automatically scan insured and policy data from business units and make it available for lineage tracking and governance.

"Our relationship with Informatica is so important because it's helping us move to the next maturity level, addressing goals that are existential to our business in terms of how the Brazilian insurance industry is evolving," says Magalhães. "Informatica is supporting the acceleration of our digital transformation, mitigating risks, and enabling a more efficient operation in today's insurance environment."

Inside The Solution:

- Informatica Intelligent Cloud Services
- Informatica Cloud Data Integration
- Informatica Master Data Management
- Informatica Test Data Management
- Informatica Enterprise Data Catalog

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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