Case Studies

CloudEQS

DELTA DENTAL®

Enterprise Data Platform Cloud - Assessment

Industry: Largest Dental Insurance company in US

Revenues: $7.9 B

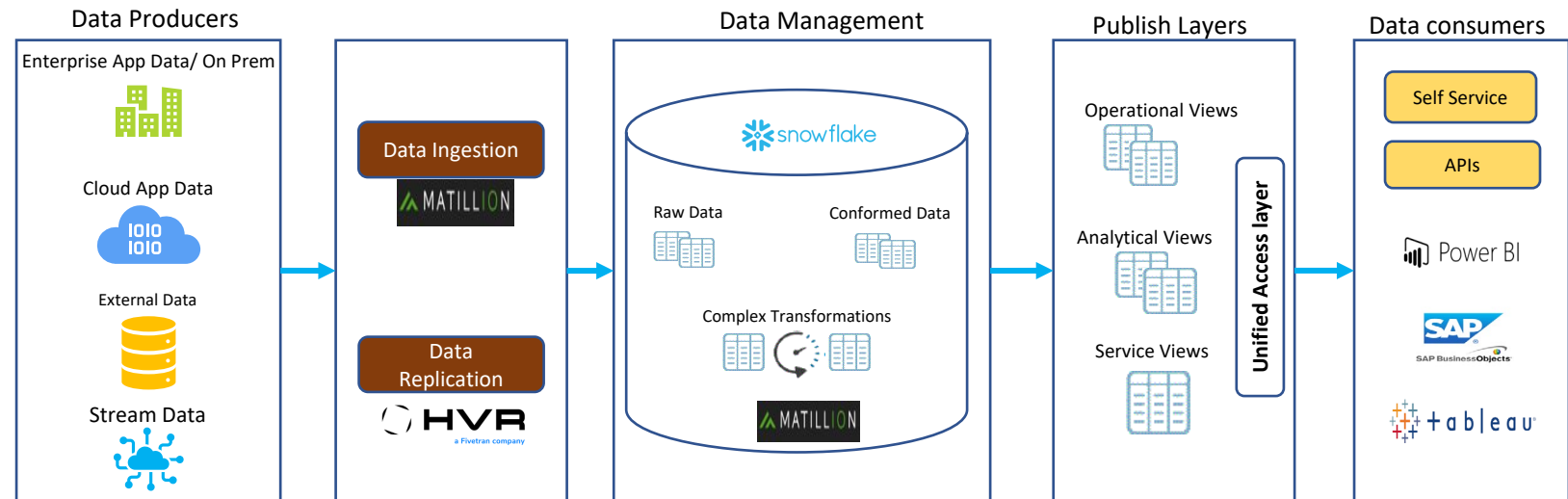**Employees:** 2,900+

Location: Oakland, CA

Challenges
- No Single source of Trust
- Multiple data silos
- Lack of trust on data
- Time to insight
- Customer ETL

Results Achieved
- Target Enterprise Data Platform Cloud Architecture
- Tools Finalization (Snowflake, HVR and Matillion)
- Enterprise alignment for Migration
- Migration Approach & Roadmap

- Comprehensive Assessment for capturing the Business and Technology drivers
- Documenting the Current ETL landscape
- Target Architecture for Enterprise Data Platform on Cloud
- Tools Recommendation
  - Snowflake for Datawarehouse
  - HVR for Data Replication
  - Matillion for Transformation
- Proof of Concept for Snowflake, Matillion and HVR
- Sizing & Vendor Negotiations
- Migration Strategy & Roadmap along with Use Cases

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AgCREDIT
FARMS | HOMES | LAND

Enterprise Data Platform Cloud - Assessment

Industry: Banking & Financial Services

Revenues: $202 M

Employees: 820+

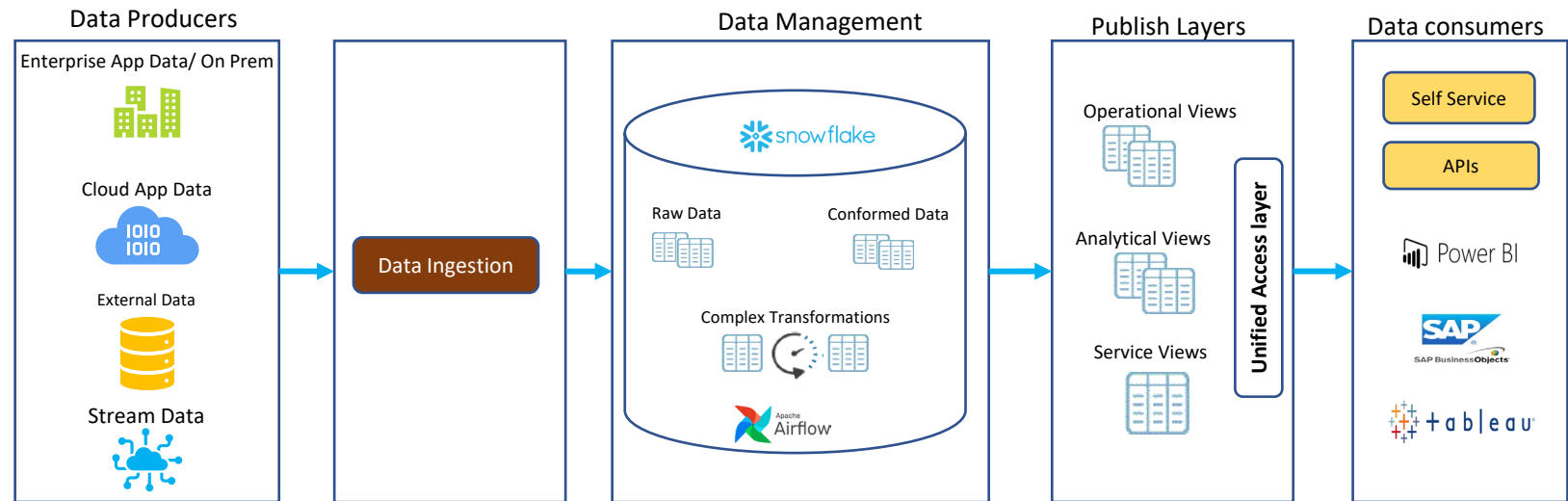**Location:** Santa Rosa, CA

Challenges
- Time to Insight
- Ability handle 1000+ External KPIs
- Custom ETL
- Not able to scale

Results Achieved
- Target Enterprise Data Platform Cloud Architecture
- Tools Finalization (Snowflake, FiveTran and Matillion)
- Enterprise alignment for Migration
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- Comprehensive Assessment for capturing the Business and Technology drivers
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Data Producers — Enterprise App Data/ On Prem, Cloud App Data, External Data, Stream Data → Data Ingestion → Data Management (snowflake: Raw Data, Conformed Data, Complex Transformations, Apache Airflow) → Publish Layers (Operational Views, Analytical Views, Service Views, Unified Access layer) → Data consumers (Self Service, APIs, Power BI, SAP Business Objects, tableau)

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Case Study

On-Prem to Enterprise Data Platform Cloud Migration

Industry: Largest Dental Insurance company in US

Revenues: $7.9 B
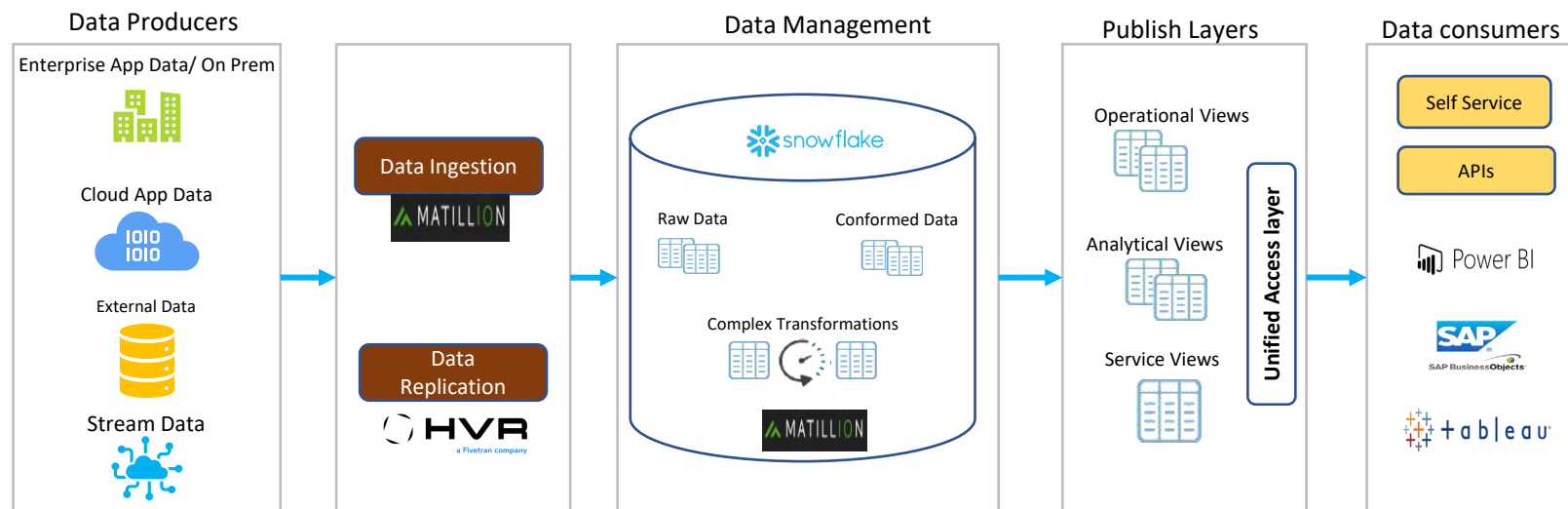
Employees: 2,900+

Location: Oakland, CA

Challenges
- No Single source of Trust
- Multiple data silos
- Lack of trust on data
- Time to insight
- Customer ETL

Results Achieved
- Successful migration to EDP Cloud
- 7 months migration effort with no schedule delays
- Zero defect delivery

- End-to-end migration ownership
- Realization of Enterprise Data Platform Cloud migration Architecture
- Data Lake Creation using HVR Replication
- Environment Preparations including Network policies, RBAC and SCIM Integration
- Release Mgmt., Change Mgmt., Dev-Ops
- Migrate Legacy DW (SQL Server – 22 TB, 18 data sources, 200+ SPs) to Enterprise Data Platform using **Matillion** & **FiveTran** with **Snowflake** as DW.
- Retrofit existing TIBCO DV to work with Snowflake
- Retrofit the existing BOBJ and Tableau Reports to work with Snowflake
- Lift & Re-engineer Legacy BODS Mappings, Java Code, and SQL Server Store Procedures using Matillion

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Enterprise Data & Analytics Implementation

Industry: Hi-Tech company focusing on Critical Event Management platform

Revenues: $271 M
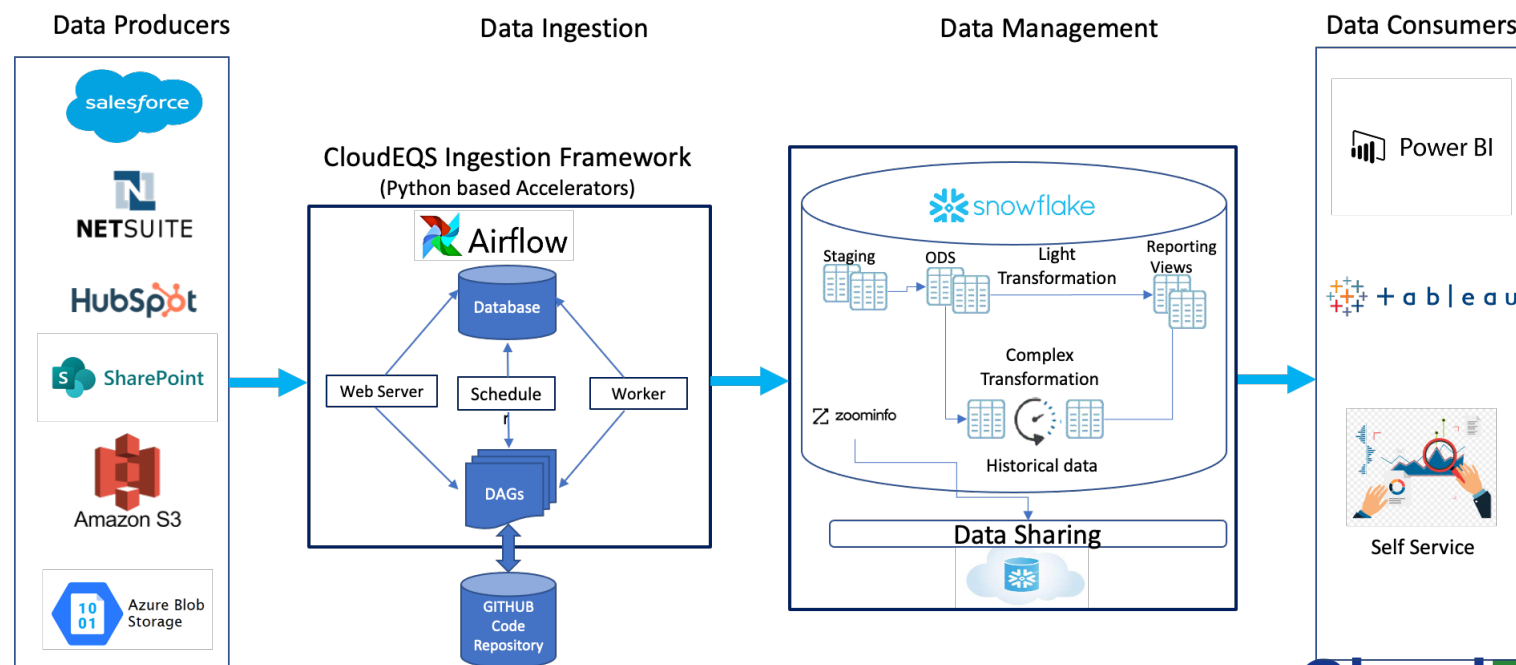
Employees: 1,950+

Location: Burlington, MA

Challenges
- No Enterprise DW
- No Integration
- Multiple Salesforce Instances
- Disconnected Environments
- Poor Customer Data Quality
- Manual and Costly Reporting

Results Achieved
- Centralized Cloud DW (Snowflake) with data from SFDC, NetSuite, HubSpot, SharePoint and Azure BLOB/S3
- Enable Tableau and Power BI Dashboards using the Cloud DW
- One of the fastest foundation built in 3 months

- Cloud DW Strategy Assessment & Roadmap definition
- End-to-end delivery ownership in defining the strategy to Migration
- Used CloudEQS Accelerator Framework - a zero cost ETL system for Data Ingestion to extract data from multiple Salesforce instances, NetSuite, HubSpot, SharePoint and Azure BLOB/S3
- Build a Cloud DW for Enterprise Analytics & Reporting for Revenue, Bookings, Pipeline movement (Sales Intelligence)
- End-to-end ownership of maintenance and support of ETL pipeline and DW
- Dev-Ops using Airflow, Snowflake & GitLab

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Enterprise Customer Master Management System Implementation

Industry: Hi-Tech company focusing on Critical Event Management platform

Revenues: $271 M
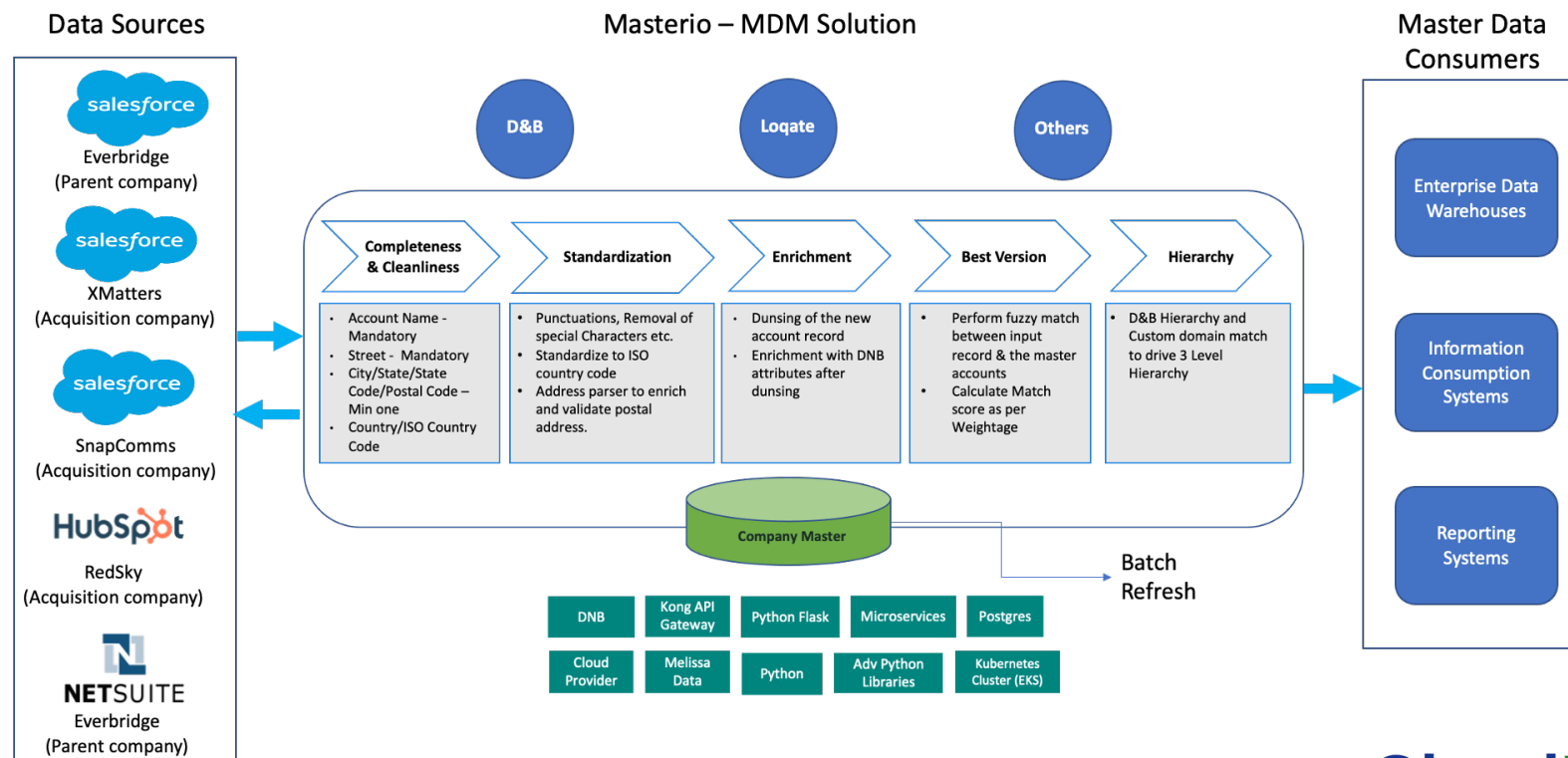
Employees: 1,950+

Location: Burlington, MA

Challenges
- No Enterprise Master Data management system
- Multiple Business Acquisitions
- Multiple Salesforce Instances
- Duplicate records
- Poor Customer Data Quality

Results Achieved
- Centralized Customer Master
- Golden Customer record creation
- Faster Customer master migration to one Salesforce Instance

- Centralized Customer Master using CloudEQS MDM Solution - Masterio
- Assisted Salesforce migration Process
- Data standardization from acquisitions
- Improved Reporting quality and Sales efficiency

Data Sources

salesforce
Everbridge (Parent company)

salesforce
XMatters (Acquisition company)

salesforce
SnapComms (Acquisition company)

HubSpot
RedSky (Acquisition company)

NETSUITE
Everbridge (Parent company)

Masterio – MDM Solution

D&B   Loqate   Others

Completeness & Cleanliness
- Account Name - Mandatory
- Street - Mandatory
- City/State/State Code/Postal Code – Min one
- Country/ISO Country Code

Standardization
- Punctuations, Removal of special Characters etc.
- Standardize to ISO country code
- Address parser to enrich and validate postal address.

Enrichment
- Dunsing of the new account record
- Enrichment with DNB attributes after dunsing

Best Version
- Perform fuzzy match between input record & the master accounts
- Calculate Match score as per Weightage

Hierarchy
- D&B Hierarchy and Custom domain match to drive 3 Level Hierarchy

Company Master

Batch Refresh

| DNB | Kong API Gateway | Python Flask | Microservices | Postgres |
| Cloud Provider | Melissa Data | Python | Adv Python Libraries | Kubernetes Cluster (EKS) |

Master Data Consumers

- Enterprise Data Warehouses
- Information Consumption Systems
- Reporting Systems

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THANK YOU

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