

# Extreme Database Marketing



**INSURANCE LEADER** turns to Syncsort's DMExpress to accelerate DB marketing implementation

When it comes to insurance marketing and sales, nothing can beat well-designed, personalized interactions with customers. Independent insurance agents who are out in the field every day strive to develop and cultivate personal relationships with their buyers that ideally last for decades. Of course, a customer's needs continue to evolve and change as they grow older and their circumstances change: marriage or divorce, births, deaths, retirements, disabilities, and other life events create opportunities for an insurance company to sell more products to its policyholders.

That's why one major insurance carrier – a leader in domestic property and casualty, life insurance, and retirement planning – uses comprehensive database marketing techniques to enable its agents to present targeted upsell and cross-sell offers and pricing to their customers via a highly personalized agent portal. This agent marketing solution is the result of an exceptional technology cooperative involving Trillium Software for data quality, Teradata for the data warehouse, Informatica for data integration, and Syncsort to speed data integration processing tasks. A leading system integrator brought these technologies together.

## Fitting Data Integration into a Tight Processing Window

The foundation of this successful database marketing platform is a massive data warehouse that pulls in data from dozens of operational sources and requires daily processing of each day's customer and policy updates to support comprehensive model score processing that occurs over every weekend window. The initial processing involves multiple steps to bring as many as 10 operational files that each range from 20-50 GB in size. The integrated data is then fed into Trillium for sorting, grouping, and data quality (such as matching) – which can take up to 12 hours alone. Finally, the aggregated data is loaded into the Teradata star schema to populate the data warehouse that feeds the agent marketing system.

The system receives the new data from various sources each day throughout the week, and over the weekend must refresh the data warehouse and create the new offers for the agents to present to their policyholders by 7 am each Monday morning.

### INDUSTRY

- Finance and Insurance
- One of the world's largest providers of insurance and financial services
- Focus on domestic property and casualty insurance, life insurance, and retirement planning

### CHALLENGE

- Need to resolve bottlenecks within strategic agent-marketing application
- Unable to meet "weekend window" SLA to create personalized offers using database marketing techniques
- Need to integrate, sort, and join 30 large data files of 20-50GB each

### SOLUTION

- Added Syncsort's data integration acceleration featuring DMExpress
- Complements and extends Informatica
- Provides faster sort and join functions for Trillium data quality solution

### BUSINESS VALUE

- Faster completion of data integration, sorting, and joining, while using fewer hardware resources
- A smarter database marketing platform for agents to deliver customized marketing offers to customers faster.
- Increased revenue, greater agent loyalty, and stronger relationships between policyholders and agents.

At first, meeting this Service Level Agreement seemed like an impossible task. Initial calculations showed that a Friday-to-Monday delivery could not be achieved due to the large data sets and the intensive processing required at multiple steps of the process. With Informatica as the data integration software, the only way to deliver updates by Monday morning was to begin processing on Wednesday evening – which would exclude all of the data from Thursday and Friday. Informatica themselves recommended finding an alternative product to speed the processing.

That's when the insurer added Syncsort to complement and accelerate its Informatica implementation. Syncsort's data integration (DI) acceleration solution addresses performance bottlenecks in existing DI environments that cause data latencies, while reducing the cost and effort of delivering information to decision makers. Syncsort's DI acceleration solution features Syncsort's extreme performance DI software, DMExpress, which leverages over 40 years of innovation in performance-oriented data integration technology.

DMExpress complements Informatica to integrate 30 separate data files, with DMExpress running multiple processing steps in parallel to prepare incoming data from operational systems for input into Trillium. Syncsort handles the intensive sort and merge file-based transformations. All data is piped - in memory - between Informatica and DMExpress, eliminating any I/O bottlenecks.

Once the data is in Trillium, DMExpress performs all of the sorting within Trillium, which cleanses the data, identifies records belonging to the same party based on a match key in Trillium and builds the target model (star schema) to load into the Teradata data warehouse. Since dimensions are particularly join-intensive, DMExpress is essential to achieving the necessary processing speeds.

### Enabling Smarter Marketing

Collectively, this technology partnership – and Syncsort in particular – is making the agent marketing application possible. Early test and development environments were quickly overwhelmed by the processing workload required, and the project could not have met the required Service Level Agreement. Major investments in additional memory and processing resources were looming as the only other potential solution – costs that the insurer was eager to avoid. With DMExpress DI Solution as an integral component of the implementation, the agent marketing application is meeting production SLAs, while containing costs. Agents log into the system on Monday morning and receive a personalized array of offers and campaigns targeted for their policyholders based on the latest data. For example, for an agent whose policyholder just had her first child, the agent can suggest new or expanded life insurance coverage for the parents. The benefits of the agent marketing application to this major insurance company include increased revenue, greater agent loyalty, and stronger relationships between policyholders and agents.

### About Syncsort

Syncsort is a global software company that helps the world's most successful organizations rethink the economics of data. Syncsort provides extreme data performance and rapid time to value through easy to use data integration and data protection solutions. With over 12,000 deployments, Syncsort has transformed decision making and delivered more profitable results to thousands of customers worldwide.

**syncsort** RETHINK THE ECONOMICS OF DATA\*

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