



CASE STUDY:
**MODERNIZED DATA
WAREHOUSE SOLUTION
PHASE II**

CLIENT BACKGROUND

The fourth largest credit union in the US, this client provides a full range of consumer and business banking services, managing assets of over \$14B. Headquartered in Washington State, the credit union's membership extends across the U.S. and worldwide.

MANAGING
ASSETS OF OVER
\$14B

BUSINESS FOCUS

The client had a legacy data warehouse in place for many years, but leadership realized it was no longer sufficient to support analytics needs and the business going forward. They also needed to quickly implement a replacement for one of their largest data integration platforms (Sagent, a Pitney Bowes extract, transform, and load (ETL) and business intelligence (BI) tool) that was set to be retired and would no longer be supported.

OBSTACLES

In Phase I of the effort, the client turned to Datasource to modernize their data warehouse architecture and enhance the contents with additional information in a single, centralized repository. The company selected Informatica Developer for data integration to replace Sagent, and Informatica Data Quality (IDQ) to enhance data quality within the final solution.

In Phase II, the team had two primary goals:

- Mentor client personnel to grow towards independence in server administration, Informatica development, and data architecture.
- Complete subsequent releases that bring additional subject areas and data elements forward for business users.

THE DATASOURCE SOLUTION

In Phase II, the Datasource consultants collaborated with the client's team to create a Business Planning Matrix as a roadmap for releases over the lifespan of the legacy data warehouse conversion project.

The Matrix prioritizes subject areas and related data based on business value, complexity, and completion of predecessor tasks. It also lets business departments know when the value they are seeking in the data will be delivered.



Roadmap



Coaching

Through bi-weekly planning, daily standups, and daily coach and review sessions, Datasource worked with the data architects to create data models for three more releases. Informatica resources worked with client administrators and developers to coach through administration and development skills.

Our technical delivery management met with senior client executives on a monthly basis for a “mentor checkpoint review” to assess individual and team progress. This review was objective, utilizing metrics from code deliverables and the task tracking tool, to help highlight achievements and areas of concern.

RESULTS

The client has seen an increasing level of competency in the area of Production Informatica support, with multiple support personnel taking on these responsibilities. They are able to:



Install patches and updates



Interface with Informatica support



Deploy and install code packages



Execute daily job runs

RELEASES

Data architecture competencies and comprehension have improved substantially, with the mentoring process including frequent reviews within the team and with a Datasource Competency Director. The team made good use of ETL metrics to understand where to focus attention. Templated modules and step-by-step instructions have enabled developers to be productive on the basics while seeking to understand more challenging modules when they feel ready. At any given point in time, there are several releases in progress.





“Datasource is as good as it gets. In my fifteen years of leading large scale technology initiatives, they are truly the best implementation partner I’ve worked with – in terms of their depth of knowledge and expertise in the data integration and warehousing space, their focus, patience, and reliability, and their ability to deliver high quality work and business value on time and within budget despite numerous challenges.

They have quickly and skillfully identified and mitigated project risks, communicated best practices, and recommended optimal solutions. We’ve been particularly impressed by Datasource’s use of ETL ‘templates,’ leading to greater consistency in coding, scripting, and testing. This has also facilitated knowledge transfer to our less experienced internal team.

Engaging Datasource has been key to the success of our initiative – now on its third and final phase.”

- Datasource Client

PARTNER WITH US

Contact us to learn more about how our data integration solutions can provide your organization with access to improved information, enabling leaders to make well-informed decisions and achieve more efficient operations.