



Moving People:

Revolutionizing Global Relocation Services with Cloud Integration



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Graeme Howard
CIO
Santa Fe Relocation

Goals

Unify and accelerate information access for customers and employees across 96 locations in 47 countries

Give customers self-service access to accurate, up-to-date information about their relocation

Improve overall customer experience

Solution

Modernize systems and service delivery by moving from legacy relocation platforms to Salesforce as a single source of truth

Use Informatica Intelligent Cloud Services to integrate data from Salesforce

Enhance on-premise data integration

Results

Delivering a better customer experience, real-time tracking of relocation data, and valuable intelligence to help alleviate the stress associated with relocation

Strengthening Santa Fe's competitive edge through an integrated offering

Improving operational efficiency companywide

Business Requirements:

- Achieve rapid time to value and a clean data migration
- Provide strong security to meet increasing compliance requirements
- Increase efficiency by minimizing manual processes and support business needs

About Santa Fe Relocation

Headquartered in London, Santa Fe Relocation is a global leader in international mobility, handling international and domestic relocations around the world based on its own operations and a network of agents. Santa Fe's ambition is to make it easy for companies and people to live and work freely and flexibly around the world. The company has more than 2,500 employees.

Moving is an exciting but often stressful process, complete with anticipation, strong emotions, and logistics galore. When multinational companies move employees and their families around the world, they want the relocation journey to be as smooth as possible. Many turn to Santa Fe Relocation (Santa Fe), winner of the Forum for Expatriate Management 2017, Relocation Management Company of the Year Award.

Santa Fe provides a full range of relocation services for multinational companies and other organizations that send their employees on assignments. It also serves individuals relocating without the support of an employer. Santa Fe covers the entire relocation journey from packing, moving and immigration services, to obtaining work and resident permits.

Unifying a global business

Santa Fe grew through both organic and strategic acquisitions, and today it has 96 locations in 47 countries. This large global footprint gives the company the ability to relocate people throughout most countries. However, it also presented challenges, with multiple relocation systems and custom applications making it difficult to establish a single version of the truth. Without the ability to access and share consistent data, employees could not always provide the best and most timely customer service.

Security and compliance were also growing concerns, as Santa Fe must observe a variety of international requirements around personally identifiable information (PII). Because information was not centralized, it was often shared among offices using faxes or paper forms.

"To remain competitive, we needed to unify our global operations, strengthen information security, and move away from legacy IT systems that were highly customized," says Graeme Howard, Chief Information Officer at Santa Fe Relocation. "So we established a clear strategy to revolutionize the global relocation industry using mobile and cloud technologies."

Already a Salesforce customer, Santa Fe decided to expand its use of the solution from pure CRM to encompass customer service and job management. Legacy systems would be retired in a phased approach, with Salesforce providing a single source of the truth for all the company's global operations. In the meantime, however, Santa Fe still had to access data from many on-premises sources. It needed an automated way to cleanse and integrate data into its Salesforce cloud.

"We needed a cloud integration solution that could easily plug into Salesforce and also connect to our legacy systems to provide the glue to hold everything together," says Howard. "We wanted near real-time data updates as well as batch processes to load data from legacy platforms."



“We considered other methods, but found Informatica Intelligent Cloud Services to be very flexible and easy to use, enabling us to move legacy systems to the cloud three times faster. Any other approach would have cost us much more in lost opportunities and capital expenditures, and data quality would not have been as high.”

Graeme Howard
CIO
Santa Fe Relocation



Threefold faster time to value

For Santa Fe to accomplish its integration goals, a trusted and secure data migration was critical. Time was also of the essence. The company considered working with an existing supplier that proposed using an API for Salesforce migration, but worried that the migration would be lengthy and costly. It also wanted finer-grained control over the data flow, with the ability to retire functions of legacy platforms piece-by-piece and re-use certain knowledge and data structures, instead of immediately replacing the entire platform. After considering several approaches, Santa Fe decided to use Informatica Intelligent Cloud Services (IICS) and leverage the Informatica Cloud Connector for Salesforce to synchronize data.

Santa Fe worked with Cloud Perspective, a UK-based Informatica Cloud Premier Partner, to get the most from the Informatica solution. “Support is critical for us, and the ability to work with Informatica, Salesforce, and Cloud Perspective in a seamless way contributes hugely to our success,” says Howard. “It allows us to make consistent progress while still having the agility to react to unexpected change.”

Improving customer service

Armed with a consistent source of up-to-date data about customers and their relocation details, Santa Fe employees around the world can provide much more timely and responsive customer service. With information available in Salesforce, any authorized employee can help any customer—pertinent details are no longer trapped in emails and legacy applications. Faster information access also enables Santa Fe employees to provide highly accurate, near real-time data instead of waiting up to a day to respond, helping the company increase customer satisfaction by responding quickly to the needs of its customers.

“We gained a huge amount of visibility with Informatica and Salesforce, and that translates directly to better customer service and therefore improved performance and satisfaction,” says Howard. “Customers now get immediate responses because we have the data we need at our fingertips.”

Customers also have self-service access to the information they need using Santa Fe’s rich mobile-friendly apps. Human resources departments can track where employees are in the relocation journey so they can keep records current and provide the best possible support. Employees can access data about local schools, accommodations, and related services. Not only does cloud data integration enable a better customer experience, helping relocating families settle as best as possible in their new homes—it also enables Santa Fe to ensure customers get all the services they need based on real-time data.

“We would not have been able to provide such a holistic, real-time mobile experience for our customers without Informatica Intelligent Cloud Services,” says Howard. “We are giving customers accurate, up-to-date information while also increasing customer service and satisfaction by better understanding their needs and when.”



Inside The Solution:

- Informatica Intelligent Cloud Services

Global relocation, global compliance

With the ability to pass information digitally and more securely around the world, Santa Fe is strengthening compliance, helping the company meet the demands of large, international corporations. As the General Data Protection Regulation (GDPR) takes hold in the European Union and compliance requirements tighten worldwide, Santa Fe will be prepared. Instead of facing a regulatory nightmare, Santa Fe is using compliance as a competitive advantage.

"The integration work we've done with Salesforce and Informatica has been a business enabler for us, opening up new market opportunities," says Howard. "We're able to serve some very large international companies that we would never have been able to manage before because of their strict compliance requirements. We've won major new deals."

Improving efficiency

By using Salesforce to streamline and unify data access, Santa Fe is reclaiming employee productivity while reducing hosting and support costs, making the entire company more efficient by being customer-centric. As the company's journey to the cloud continues, IICS will help it "relocate" by providing easy-to-deploy connectors for today's popular cloud applications.

"After using Informatica Intelligent Cloud Services for three months and two integration projects, operational efficiency improved companywide, allowing us to shift our focus to our customers' needs versus internal matters," says Howard. "I see more potential for the next 18 months as we continue to bring other data sources into the cloud, migrate from legacy platforms and add functionality."

