



Insuring Customer Satisfaction:

Santalucía Seguros Powers Customer-Centric Digital Transformation with MDM and Data Quality

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Carlos Garcia
Head of IT Channels and Clients
Santalucía Seguros



Goals

Transform from a policy-centric insurance company into a digitally-driven, customer-centric organization spanning multiple lines of business

Refresh IT solution portfolio to adapt to an evolving insurance market and enable different teams to work more collaboratively

Standardize customer names and mailing addresses dispersed throughout the organization to improve service and minimize duplicate or misdirected communications

Solution

Deploy Informatica Multidomain MDM to master customer data across the organization

Integrate Salesforce CRM and Salesforce Marketing Cloud to present business users with a complete, real-time view of each customer

Use Informatica Data Quality to enforce automated rules to correct common data quality issues in customer name and address fields

Results

Enables more personalized and consistent communications with current and prospective customers, helping retain customers and win new business

Improves the efficiency and effectiveness of sales, marketing, and other business functions with an accurate and complete view of customer base

Helps ensure customers' names and addresses are correct and standardized for more accurate and professional mailings and outreach

Business Requirements:

- Implement a modular, end-to-end MDM solution that includes embedded data quality
- Integrate with cloud and on-premises applications for bi-directional MDM
- Partner with a knowledgeable services organization to optimize deployment

About Santalucía Seguros

Santalucía Seguros is the parent company of an independent Spanish group that sells insurance and reinsurance coverage in Spain and Latin America. It has a network of 400 agencies with 17,000 workers throughout Spain.

For more than 100 years, Santalucía Seguros has provided insurance coverage to individuals and businesses in Spain. The Madrid-based company has long maintained a familiar brand and brick-and-mortar presence. However, many customers now prefer to be contacted and purchase insurance policies through digital channels.

To adapt to their needs, Santalucía Seguros is undergoing an enterprise-wide digital transformation across all its lines of business, including home, life, savings and investment, retirement, pet, and other insurance products. At the same time, the company wanted to refresh its IT solution portfolio to adapt to an evolving insurance market and enable its different product and sales teams to work more collaboratively using the same customer data.

“To continue our long tradition of success, we need to change from a policy-centric, traditional insurance company to a data-driven, customer-centric company,” says Carlos Garcia, Head of IT Channels and Clients at Santalucía Seguros. “This is a challenge for us because we have many lines of business, with different people making decisions based on their own view of customer data. To be truly customer-centric, we needed to collapse those different customer perspectives into a single view that serves as a reliable basis for our development and growth.”

Mastering customer data for digital transformation

Santalucía Seguros began looking for a modular, end-to-end master data management (MDM) solution that included embedded data quality and could integrate with on-premises applications as well as cloud applications, such as Salesforce.

“Both our business and IT organizations understood that to change from a policy perspective to a customer perspective, MDM was a necessary first step,” says Garcia. “We wanted a commercial, off-the-shelf solution that could meet our needs. We chose Informatica MDM because it had very good references and has earned high marks from industry analysts for years as the number-one MDM solution on the market.”

To optimize deployment timelines and application performance, Santalucía Seguros engaged Informatica Professional Services to deploy Informatica Multidomain MDM to present business users with a complete view of each customer. Informatica integrates with Salesforce in real time via an enterprise service bus, which is used to track messages and possible errors in API calls. To keep data quality high and minimize duplicate or misdirected communications, Informatica Data Quality standardizes customer names and addresses dispersed throughout the organization.

“We aren’t MDM experts, so engaging Informatica Professional Services for our deployment was a wise choice,” says Garcia. “With their help, we were able to get the performance we needed to master our customer data in real time. Their recommendations helped us deploy the solution in an optimal way.”





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Inside The Solution:

- Informatica Multidomain MDM
- Informatica Data Quality
- Informatica Professional Services



With Informatica Multidomain MDM providing customer data to Salesforce in real time, all of the company's insurance agents can easily access up-to-date customer information. Legacy systems are also kept in sync so that any campaigns that pull customer information from the data warehouse will likewise be up to date.

More personalized, accurate, and effective communications

By using Informatica Multidomain MDM and Informatica Data Quality to provide a single source of truth for customer data, Santalucía Seguros enables more personalized and consistent communications with current and prospective customers, helping the company retain existing customers and win new business. Data errors and inconsistencies—such as misspelled names or incorrect addresses—across systems are no longer a concern, helping to make customer-facing communications more professional and increasing the likelihood that they will be read.

“Informatica MDM makes it very easy to match and merge different sources of information to get a single view of the customer, allowing us to personalize messages and send them to the right channel,” says Garcia. “With Informatica MDM, our customer interactions are more direct and specific because we now have more context for them.”

Having an accurate and complete view of customer data also helps to make the company more efficient—improving the effectiveness of sales, marketing, and other business functions.

Garcia concludes, “The business is very happy with Informatica MDM. We’re proud of the collaborative work we’re doing now, and it’s allowing us to become a truly customer-centric organization.”