Aviva Canada - Master Data Management

Sridhar Kotari – MI Transformation Lead, Aviva Canada
June 26th
**Broker Data - Associated Business Problems**

- Too many Broker codes in system with Aviva !!
- What does this Broker code mean ?
- Wish I had only one / minimal broker code for my business with Aviva

- Where should I setup the new Broker?
- It is quiet tedious and time confusing
- Wish I had only one place to setup Broker information
- How are the current Broker Hierarchies mapped between systems
- Why do I need to setup a new Broker code ?
- How do I manage security access within a Brokerage

- Why is Broker setup taking too long
- I need a different view / grouping of my Broker partners sales performance
- Wish I could manage Broker partners contact at one place

- What does these Broker codes mean ?

---

**Business Priority**

1. Provide one / minimal number of broker codes (i.e. a consolidated codes) per a brokerage office based on a new numbering scheme for improved broker experience targeting the Broker survey during Sep - Oct 2012
2. Cleanup and add metadata to the existing broker codes
3. Broker data maintenance to be managed in a single reference system
4. Ensuring broker facing, business critical applications consume the new broker code numbering scheme
5. Consolidating some of the current Broker maintenance applications into a new application
6. Ensuring minimal impact to existing legacy systems

**Business Priority**

- Broker Data Hub readiness for Commercial Lines Program / Business Systems Transformation initiatives
Overall Scope for Aviva Broker Center

**Broker Data Hub**
- Build the core Informatica hub for Broker Data to include current Broker hierarchies
- Create the ETL processes and extracts from current systems to load the hub. Estimated 20-50 attributes will be brought to the hub
- Establish the UI for supporting data stewardship
- Establish services for consumption by peripheral systems
- Establish inbound services to support changes to hub data

**Peripheral Applications**
- Enhance peripheral systems to source or consume Broker hub data
- Initial systems analysis
- Source and consumer of Broker hub data
  - Policy Admin systems, Reporting System, Broker Maintenance systems
- Consumer of Broker hub data
  - Broker Portals, Policy systems, SalesForce.com, New Web Applications etc

**Data Profiling**
- Data profiling to be performed on existing data to identify special data requirements

**Data Governance**
- Cleanse the broker data
- Address standardization will be implemented
- Define the data management process
The Solution was designed to create an actionable Broker Data Hub Implementation Plan.
Architecture and Requirements Definition

Broker Data Hub Roadmap and Strategy

- Validate Requirements
- Finalize Requirements
- Review / Architecture Guiding Principles
- Review Architectural Vision
- Identify Broker Data Vision & Value Drivers
- Assess Organizational Readiness
- Identify Broker Data & Technology Gaps / Opportunities
- As-Is State Data & Technology Gap Analysis
- Develop Broker Data Hub Blueprint
- Develop Broker Data Hub & System Decommission Strategy & Roadmap
- Define Broker Data Hub
- Prepare Communication Plan
- Align Stakeholders

Provided the approach and methodology for Broker Data Hub Requirements, Strategy and Roadmap
A flexible and extensible Broker Data Hub solution based on Informatica MDM for Broker data was developed to -

- Consolidate all the existing Broker hierarchies and broker attributes
- Create a new Broker Hierarchy using a new number scheme
- Create a set of services enabling peripheral applications to consume the MDM services in relation to all the available broker hierarchies
- Effectively leverage Informatica’s SIF & TCS’ Composite Web Services Framework for real time service integration of hub with the peripheral systems
- Use IDQ and AddressDoctor for data cleansing and validation
- Leverage Aviva’s existing investment in Informatica Power Center
- Exploiting Informatica Data Director & Informatica Data Controls for Aviva’s Data stewardship requirements
Broker Data Hub - Execution

Broker Data Hub Solution stream will deliver an incremental Broker Data Hub capability at Aviva
Execution Plan - Summary

Iteration - 4

**Business Drivers**

- Start
- Q2 2012
- Q3 2012
- Q4 2012
- Apr
- May
- Jun
- Jul
- Aug
- Sep
- Oct
- Nov
- Dec

**Infrastructure Readiness**

- CLP Ready

**Analysis**

- Broker Data for Calligo

**Iteration - 1**

- Build / DIT
- SIT
- UAT
- Warranty

**Analysis**

- Deliver Broker Data for Calligo

**Iteration - 2**

- Build / DIT (General & other Systems)
- SIT
- UAT
- Warranty

**Analysis**

- Deliver Personal Lines cluster, 2-4 weeks ahead of Broker survey

**Iteration - 3**

- Build / DIT
- SIT
- UAT
- Warranty

**Analysis**

- Deliver Broker Management systems in time for CLP

**Iteration - 4**

- Build / DIT
- SIT
- UAT
- Warranty

**Analysis**

- Deliver RTM systems in time for CLP

**Dependencies**

- Business Drivers
- Milestone
- GO / No GO Checkpoint
- Dependencies
Highlights of Aviva Broker Master Hub

- Complex project delivered in 10 months end to end
- On budget
- Rapid delivery mechanism (Iterative Approach)
- Excellent delivery team combination of Aviva
Market Trend – Where Is The Market Focusing?

<table>
<thead>
<tr>
<th>Integrated Product/Party Focused</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Party Focused</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Product Focused</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial Services/Insurance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retail/Distribution</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industrial/Automotive</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Public Sector/Healthcare</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CME</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Low  Medium  High
Market Trend – Convergence on multi-domain MDM

- Companies almost always start small – focus on a single business case
- Success with first case brings more demand from the business
- This becomes the basis for subsequent phases
- Implementing a tactical project on a **strategic MDM platform** enables ease of future deployments
- Companies spend 25-75% less on additional stage rollouts due to leverage
  - MDM Product
  - Infrastructure
  - Integration points
Aviva Master Data Journey - Summary MDM Roadmap

**Program Management & Architecture Oversight**

**Enhanced Broker Experience**

"One Broker = One Sub-Broker Code"

- Business Case
- Assess Data
- C-Level Commitment
- Prioritize
- Scope Quick Wins
- Data Governance Proposal
- Roadmap
- Install Product

**Build Broker Data Hub**

Q2-12

- Build infrastructure for Broker Data Entity
- Begin Data Quality & Data Governance Initiative
- Operationalize Quick wins
- Monitor & Evaluate

**Build Customer Data Hub**

Q1, Q2-13

- Consolidate Customer & Policy Data across LoBs
- Derive “Golden Copy” of Customer Data
- Build Customer Householding, Cross relationship between Broker-Customer-Policy Data

**Build Multi-domain MDM**

Q3-13 & Beyond

- Introduce Product Data Domain
- Build relationship between Customer–Product and Broker-Product

**Operate & evolve multi-domain MDM**

Accelerate the introduction of new products, bundles and promotional offers for target market segments.

**Operate & evolve multi-domain MDM**

**Ongoing Data Governance**

**Transition of System Interfaces**

**Transition of Master Data & Life cycle Management Functionality**

- Introduce Product Data Domain
- Build relationship between Customer–Product and Broker-Product

**Operate & evolve multi-domain MDM**

**Master Data Management Evolution**
Thank you