

EDM Webinar 

Perform Enterprise Conversions at scale with Data Lineage Automation

A conversation with



Today's speakers

Moderator



Jim Halcomb

Head of Product
Management
EDM Council



Nissim Yves Ohayon

Director, Global Business
Development
Octopai



Fred M. Cohen

Executive Vice President
Banking, Financial Services,
and Insurance
Intelliswift



Sanjay Kalra

AVP,
Digital Engineering
Intelliswift



Large Scale Data Conversions

Adopting	Adopting an approach for conversions at scale
Leveraging	Leveraging, automation & prebuilt accelerators and data analysis dashboards
Deploying	Deploying pattern recognition algorithms for identifying regularities and irregularities
Accelerating	Accelerating conversions using audit techniques via in depth three layered lineage
Highlighting	Revealing interdependence of data assets by utilizing a data catalog with enabled automated data lineage

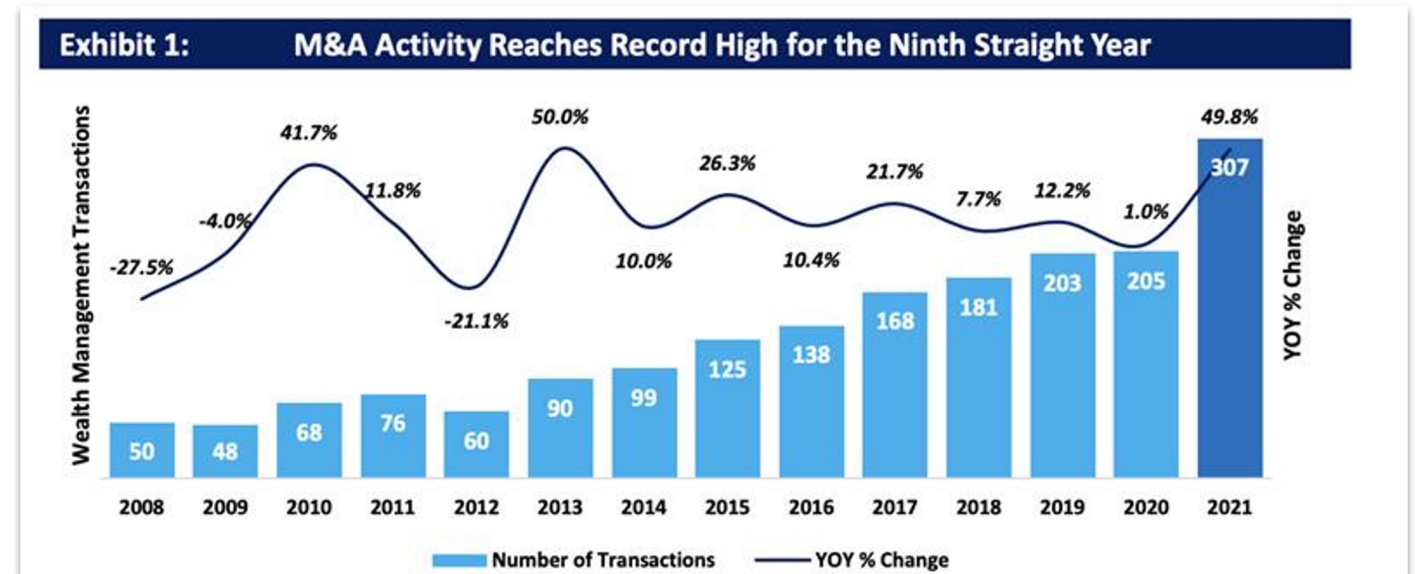
POLL #1

How does your organization trace source-to-target dependencies in your data landscape?

- A. We don't proactively trace, we respond to errors ad-hoc
- B. Automated, developed in house
- C. Automated, off the shelf tool

Data Conversion at Scale

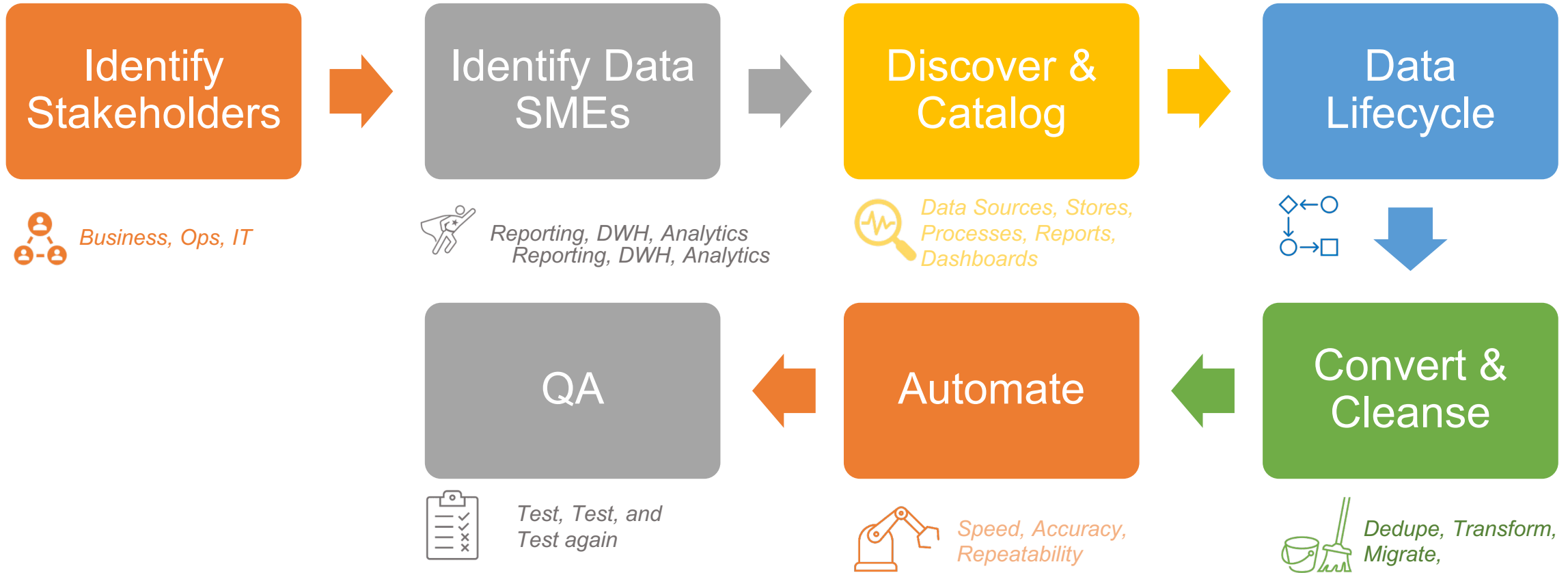
Let's take Wealth Management / Registered Investment Advisors industry



- Significant M&A activity
 - 307 M&A transactions in 2021
 - Ninth straight record-setting year for wealth management M&A
- Driven by both strategic (larger players) and financial acquirers (Private Equity)

Data Conversion Process

The common denominator in all such conversions



What do we mean by Conversion *Factory*?

A factory approach is defined by scale, standardization, automation, and re-use of processes and tooling with an eye on continuous improvement.



CoE combining Entity Resolution Engine, AI Reconciliation Engine, Machine Learning, AI lineage



UI combining intelligence from data processed + summary of recon & data lineage



Patterns of similarities between the 2+ sources of reports



The more data processed, the stronger our models and reports get as ROI builds.

CASE STUDY #1

One investment management company acquiring another

- Goal: To bring in a team to deal with data conversion
 - Timeline: Be done in 3 months
 - Discovery normally take weeks
 - Use minimal in-house resources
- Business had to decide on what to keep/retire in terms of data.

The Challenge

- Legacy data, poorly documented & key stakeholders were lost in the shakeup resulting from the acquisition
- Business committed to a tight integration timeline
- Many similar, but different data fields in use

The Solution

- Complementing manual discovery with automation
- Automated entity resolution & reconciliation leveraging AI
- Produced executive and ops dashboards for full transparency and end-to-end management

The Impact

- Data discovery happened in days, not weeks
- Automation helped to considerably increase accuracy and reducing turnaround time
- All stakeholders had a consistent and accurate view of the progress and dependencies

POLL #2

Where do you see the most impact in Data Lineage Automation?

- A. Change/Impact Analysis
- B. Root Cause Analysis
- C. Planning for data migration projects
- D. Implementing a data governance initiative

CASE STUDY #2

Telco, one of the top 3 mobile providers in the country, acquired an ISP

- Goals included upsell and cross-sell to each other's clients
- Some subscribers were common to both the Telco and the ISP, other's were net new to one or the other offering.

The Challenge

- ISP's ETL: IBM Datastage
- Telco's ETL: Informatica PowerCenter
- Identify & convert ETL packages & processes to Informatica
- Delays were impacting & threatening timelines

The Solution

- Automate lineage to confidently predict impact.
- Mapped interconnectivity between all the data assets
 - Source to target across all data intelligence tools:
 - Oracle DB, and Cognos and DataStage (being migrated to Informatica).

The Impact

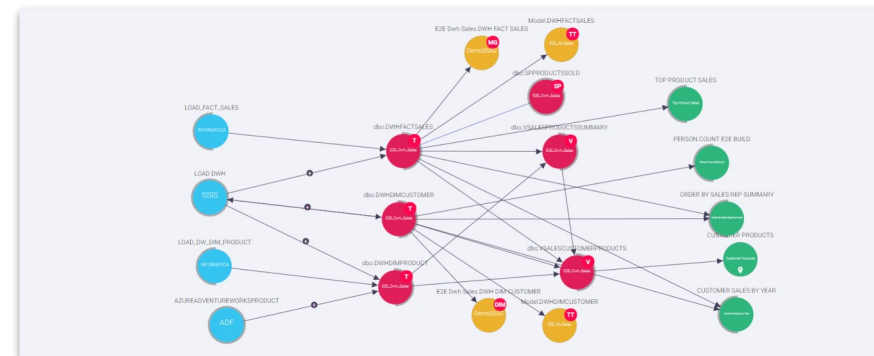
- Yearlong project reduced to 3 months
- Cross & Upselling campaigns started earlier than forecast
- Switched ETL systems in a quiet Go-Live
- Stakeholders all had visibility, augmenting trust in the data



Viewing Data Lineage From All Possible Angles

Cross System Lineage

Tracks data flows across multiple data intelligence systems. (DWH, ETL, Analysis and Reporting)



Inner System Lineage

Deeper dive, revealing the logic within each system & locating dependencies within reports.



End-to-End Column Lineage

Column-to-column-level lineage between systems from ingestion to the presentation layer, complete with transformations at each step.



QUESTIONS?

Intelliswift

- A Global Business Solutions & Technology Company With Innovation and Delivery Centers In United States, Latin America, Eastern Europe and India

Founded in 2001 & led by technocrats

Advisory Solutions Staffing

18+ Locations US, Nearshore & INDIA

25+ Awards & Recognitions

25+ Solutions Competencies

10+ Fortune 100, 124+ Fortune 500



Technology



Electronics



Retail



Manufacturing



Telecom



Travel & Hospitality



Life Sciences



BFSI & Insurance



Media



Education



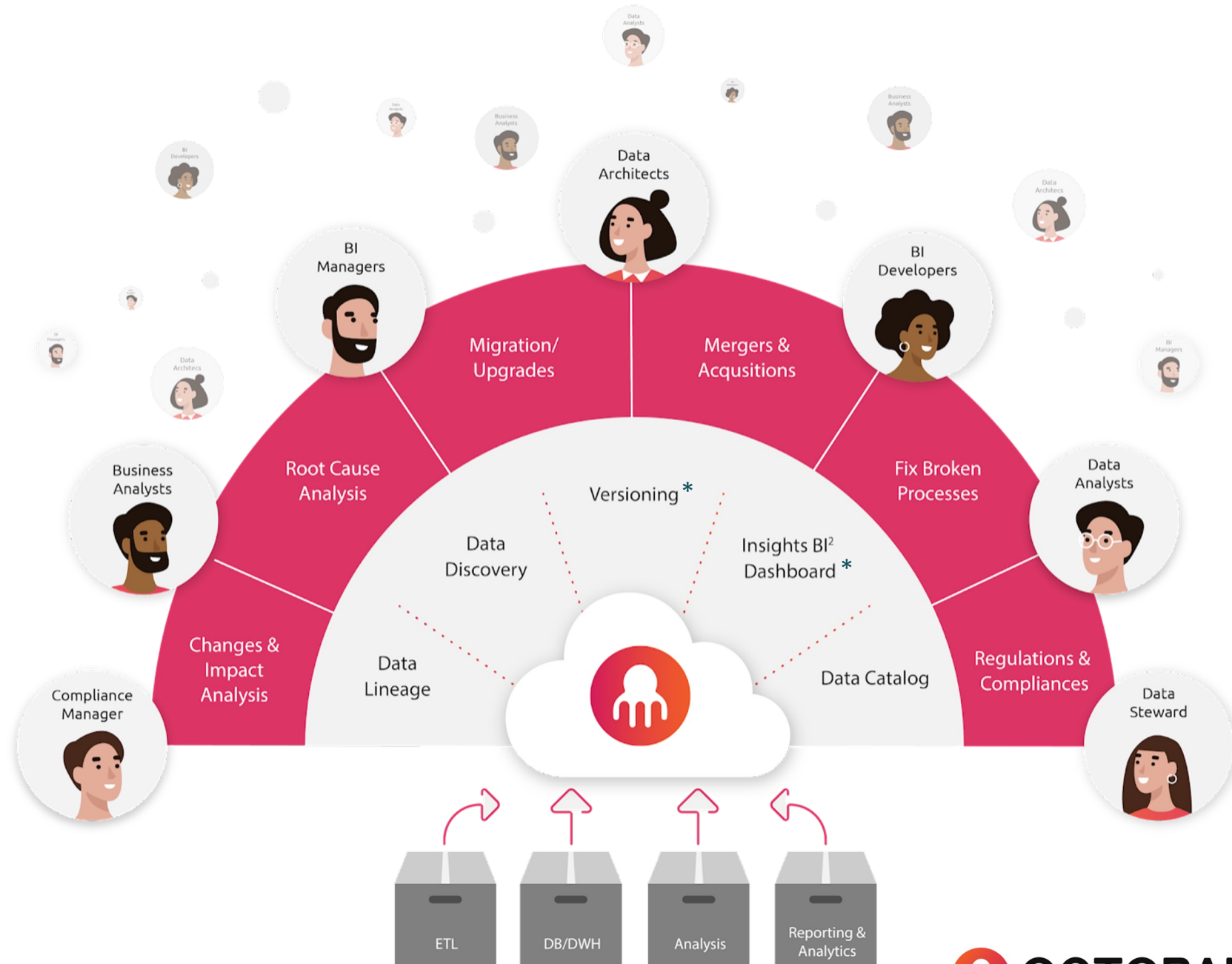
Aerospace & Defense



Octopai

at a glance

- Set up in hours
- Fully Automated
- Deep Technical Lineage
- Integrated Data Catalog
- Integrated Data Discovery



EDMWebinar 

Thank you!

FOR MORE INFORMATION:

Name: Nissim Ohayon

Company: Octopai

Email: nissimo@octopai.com

