



# Rocket® Data Virtualization

Financial services firm turns real-time customer data insights into new revenue



## Why data virtualization is critical

Organizations have a limited view of siloed enterprise data, and older architectures can't handle the volume, velocity or variety. Data virtualization transforms data sources into readily consumable formats that applications can access in real time—without Extract-Transform-Load (ETL) operations or needing to understand data format or location. This reduces complexity, improves time to market, and saves money.

## Challenge

A leading financial institution stores extensive yet difficult-to-access mainframe data about customers and their habits, including:

- Customer profile
- Customer location based on cell phone records
- Customer sentiment based on social media activity
- Risk tolerance based on credit card balances and stock transactions

By combining internal mainframe data with external data—such as geospatial and social media data—and analyzing the results in real time, the institution wanted to:

- Identify cross-sell and upsell opportunities to increase revenue
- Improve product-market fit with customers based on their buyer journey stage
- Provide company Call Center staff with real-time customer insights

To achieve this objective, the financial institution faced several challenges:

- The company's real-time analytics depends on diverse datasets stored in different locations and data formats: from customer profile data (in Db2) to transactional data (in mainframe databases) to Twitter data and historical stock price databases (in public databases).
- Some of the most valuable information, such as Physical Sequential and VSAM data sets, resides on the mainframe but is difficult to access.
- Moving the data to a data warehouse via ETL (or other methods) would be too slow, impractical, and costly for real-time analytics.
- Moving data via ETL is processing-intensive and complex, consuming costly mainframe CPU cycles.

## Solution

The only way to combine the diverse data sources effectively was with data virtualization. Rocket® Data Virtualization resides and operates on the mainframe, enabling real-time data access from any application. Organizations have instant access to information to make better-informed business decisions at a lower cost and give high-priority projects—cloud, mobile, real-time analytics—a single logical data source.

With Data Virtualization, the institution was able to locate, join, and normalize its mainframe data, making it easy to combine that data with other sources and access it via standard methods such as SQL, JSON, or web services. The Data Virtualization engine can expose the data accessed by transactions as services, making sophisticated web-based analytics interfaces possible.

## Results

Specifically, Data Virtualization enables the financial institution to:

Work with nearly any application or data source.

Once virtualized, mainframe data can work with any application.

Create, update, or expand applications.

Programmers don't need to know the internals of any virtualized data source, such as how it's formatted, what system it's running on or where it's located. Programmers who prefer SQL have access to all the virtualized data so they can easily join a SQL Server table with a VSAM record.

Simplify information access for faster time to value.

The development environment simplifies data discovery, mapping, and the creation of virtual tables. Standards-based connectivity ensures secure, reliable integration from any platform or data source.

Call Center associates now have instant access to customer information and can send personalized offers to an individual customer's mobile device in no time or send a spot offer to multiple customers in a defined geographic area.

The future won't wait—modernize today.

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