IDERA | ER/Studio® Case Study

Protective Life

Created an enterprise data dictionary to improve information quality

Overview

Alabama-based Protective Life has been in business for more than 100 years, providing innovative insurance solutions and investment products that help its clients achieve and maintain financial security. With pre-tax operating income of more than $3.5 billion, and upwards of 2300 employees in 12 states and Canada, Protective Life ranks in the Fortune 1000 and continues to grow and thrive.

With about 250 IT employees serving the technology needs of the entire company, efficiency in database design and management is essential. Financial data must be stored using strict regulations to keep information confidential and protected. It must also be readily accessible and usable to do the business any good. Given the distributed nature of IT teams across Protective Life's enterprise, keeping everything protected, standardized, centralized and accessible can be quite challenging.

Challenge

Once Protective Life's executive management understood the need to establish standards for creating and maintaining company-wide databases and data warehouses, the organization formed a Business Intelligence (BI) team consisting of participants from every business unit. The team's goal was to improve cross-functional collaboration on business requirements, designs and data models while enforcing standards in the existing shared modeling environment.

"We were creating a BI department from scratch, which would require buy-in from the various departments—each of which had its own IT group using its own technologies and applications," said Mark Underwood, Second VP of Business Intelligence at Protective Life. The company needed to establish standards for handling data throughout the organization, and simplify the process of delivering meaningful data to the various departments to support their business initiatives.

Unfortunately, Protective Life was lacking a solution capable of meeting the needs of the organization's various IT teams. Although another modeling tool had been in place as the enterprise data warehouse tool, it was not being used. "We had invested heavily in the 1990s, and had shouldered significant costs trying to support and maintain it," said Underwood. "However, when you actually talked to employees, they weren't even using the tool. We didn't have anything of any value in terms of BI – just a few spreadsheets. It became clear very quickly that we needed to evaluate other solutions."

One of the IT teams at Protective Life had been using ER/Studio, and Underwood's team evaluated the solution's capabilities as an enterprise-scale solution. "Nothing else we looked at compared to ER/Studio," said Underwood. "We looked at the long-term cost of ownership and what it would take to deploy, and we came up with cost benefit analysis to present to the decision makers. It was a relatively easy decision."

Protective
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CHALLENGES

- Implement a central data repository and consolidate to a single enterprise-wide data management platform
- Efficiently track data lineage and standardize on data model management processes
- Promote data reuse and collaboration across the enterprise
- Enhance visibility into data with flexible, efficient reporting and publishing tools

APPLICATIONS

- Business Intelligence

TOOLS USED

- ER/Studio Enterprise

Solution

ER/Studio is the fastest, easiest and most collaborative way for data management professionals to build and maintain enterprise-scale databases and data warehouses. Built-in automation of routine modeling tasks enables users to analyze and optimize database and data warehouse designs rapidly. ER/Studio provides a server-side model management system and online portal, increasing team productivity and enabling data professionals to share, document and publish models and metadata to distributed teams. ER/Studio enables greater collaboration on business requirements, designs and data models among cross-functional teams while enforcing standards.

"Our organization is beginning to understand the idea of data stewardship and has begun to define rules and processes for the flow of data," said Underwood. "With ER/Studio, we have addressed everyone's needs and pain points; now we need to fit all the pieces together so we can standardize on how information flows through the individual departments to the repository."

The ER/Studio Repository is a server-side model management system that solves many of the challenges of modeling in a team environment by allowing multiple users to collaborate on data and business process modeling projects with real-time, concurrent access. With this strategy, team members can share and re-use assets across projects for maximum productivity.

ER/Studio offers flexible licensing options, better reliability, and frequent product enhancements. Other key differentiators include industry and subject area data model templates, and a web-based portal for repository searching, browsing and reporting. ER/Studio provides visual representations of data lineage and enables the creation of an enterprise-wide data dictionary system. Such features make it easier for database architects and modelers to diagnose and understand the impact of changes to models. They can also compare and merge models to reduce duplication of work and minimize errors.

ER/Studio's Data Dictionary system and "Where Used" interfaces ensure finite levels of object traceability. Teams can assign business-level descriptions to data objects, so that when a physical data model is defined properly, ER/Studio generates a data definition language, or script.

"ER/Studio's true value is in its repository management and submodeling capabilities," said Underwood. "The BI teams don't have to see the big picture all the time. They can work on one portion and be confident that their changes won't break the rest of the model. To see the big picture, you can always trace the data back to the original sources. Describing source systems, managing data stores at the subject-area level, maintaining the master data reference and dictionaries and proving lineage to the data – ER/Studio can do all that."

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– Mark Underwood,
Second Vice President of Business Intelligence, Protective Life

Results

Since implementing ER/Studio, Underwood's organization has realized immediate benefits and expects to see more over the long-term.

"We are now fully aware of the lineage of our data and how the data is used in the enterprise warehouse," said Underwood. "We have advanced macros to standardize naming and rules, and eliminate duplication. We know where everything is, and if the business asks us for data, we can deliver it quickly, in formats each business unit can easily understand. And we have defined processes for acquiring data from source systems. It's all part of the single-source concept."

By standardizing on a collaborative enterprise data-modeling platform, Protective Life saves time and money. "For most of the IT teams, there's one person managing data, multiple sources and systems," he said. "Now everything is standardized and stored in a single repository, and we use just one platform – ER/Studio – to manage and access all of it."

And the results are significant. "It used to take us 12 man-months to compile data for a specific compliance project," said Underwood. "With ER/Studio, we're done in about 25 minutes."

Underwood also noted several intangible benefits, such as the ability to shift IT staff from doing busy work to performing more productive, revenue-generating tasks. Additionally, deployment only took three months. "ER/Studio frees up our staff and enables us to increase the value of IT to the organization," he said. "As the solution becomes part of our IT fabric, I'm confident that our investments in it will continue to provide future benefits."

Protective Life's new BI team was able to completely change the way databases were created and managed across the enterprise by standardizing on ER/Studio. In doing so, they are able to more easily meet strict compliance requirements while shifting staff resources to collaborative data modeling and increasing the value of IT to the organization. The company can really benefit from enhanced visibility into business-critical data and use it to refine and achieve business goals moving forward.

RESULTS

- Reduced the time it takes to compile data for compliance projects from 12 man-months to about 25 minutes
- Implemented an enterprise-wide data dictionary to encourage collaboration and data reuse
- Enhanced data visibility and information quality across systems and business units
- Improved communication across distributed teams with more effective reporting and publishing of data models and metadata