

Case study:

Flexibility, automation
and scalability are key to
successful data quality
management when
undergoing a merger

Clean Data.
Limitless Growth.



Case Study

CHALLENGE

As part of a large-scale superannuation merger project, a group of smaller funds were merging to form a larger fund. Investigate^{DQ} was engaged to manage their data quality in all stages of the merger, as well as continuing after. A set of rules needed to be developed for data quality that could handle the current and future states across a variety of account types, including accumulation, defined benefit, allocated pension, lifetime pension, and insurance-only accounts.

The total member accounts would jump from 400k to 1.2million after, so rules needed to be scalable and continue to run quickly when the database tripled. Additionally, each fund came with its own set of insurance policies and grandfathering issues, so the solution would need to be able to cater for each type of insurance.

Case Study

SOLUTION

One of the funds had been using Investigate^{DQ} for years, both from the Trustee side and on third party administrator's side. They were familiar with how it worked and knew that it was suitable for the needs of the transition and ongoing Data Quality management.

Five rule tranches of various sizes were proposed to cover all manner of data quality and integrity, such as static client data, insurance, transactions, and even financial crime. Investigate^{DQ} would be used as the solution and primary workflow system for management of these rules, based on the fund's prior experience and recommendation of the system.

A team of experts from Investigate^{DQ} was brought in to install the product and write most of the rules, before handing over to the client for BAU maintenance and ongoing rule generation.

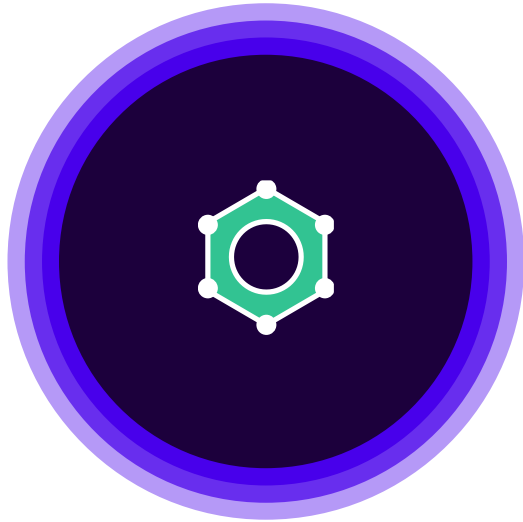
Case Study

RESULT

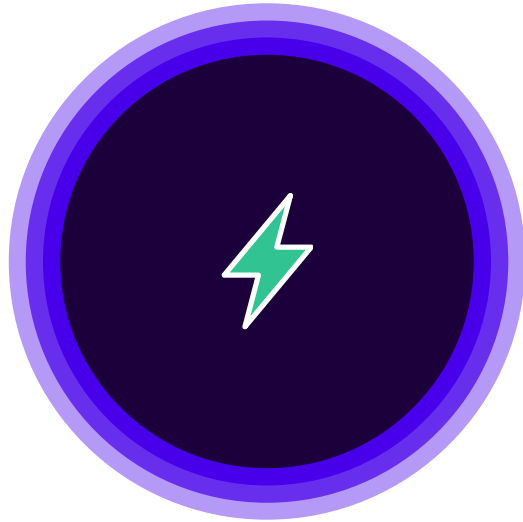
300 rules were ultimately written, with 220 operationalised by the time the team from Investigate^{DQ} transitioned off the project and handed over to our client for BAU, and the remaining 80 in testing waiting for approval. Most of the rules were able to run in seconds each, even after the migration, meaning they could all be scheduled to run first thing in the morning and have results ready by the time staff began their day.

Investigate^{DQ} was integrated into everyday BAU processes across multiple teams with 160 staff members in the production environment using it daily and the intention to push it out across the entire company. These are staff members from all aspects of the business, using it for everything from day-to-day work queues to report generation and risk management. Before transitioning, the Investigate^{DQ} team were able to train a few staff members, who in turn trained everyone else; a testament to the usability of the system.

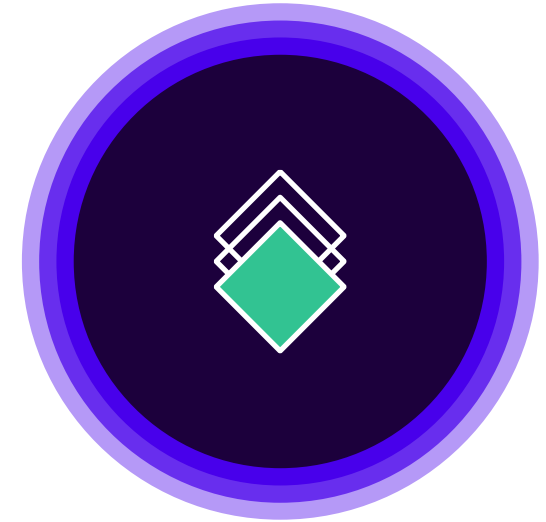
Why data driven industry leaders choose Investigate DQ



Connects directly to varied data sources including Systems, Databases and Files



Systematically identify Data Quality issues for remediation in a timely manner for better Member outcomes



Reconcile multiple sources of data to ensure accuracy and traceability

Key Benefits



Ability to understand, track, manage and report on fraud risk and data quality across systems, products and members



Reduction in remediation and compensation costs through early identification and avoidance of issues



Provide customers with a better experience and outcomes



Enhance quality and confidence in data to establish a foundation for data-driven decisions and initiatives

Investigate^{DQ}

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today to get your
competitive advantage

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