Rocket®software
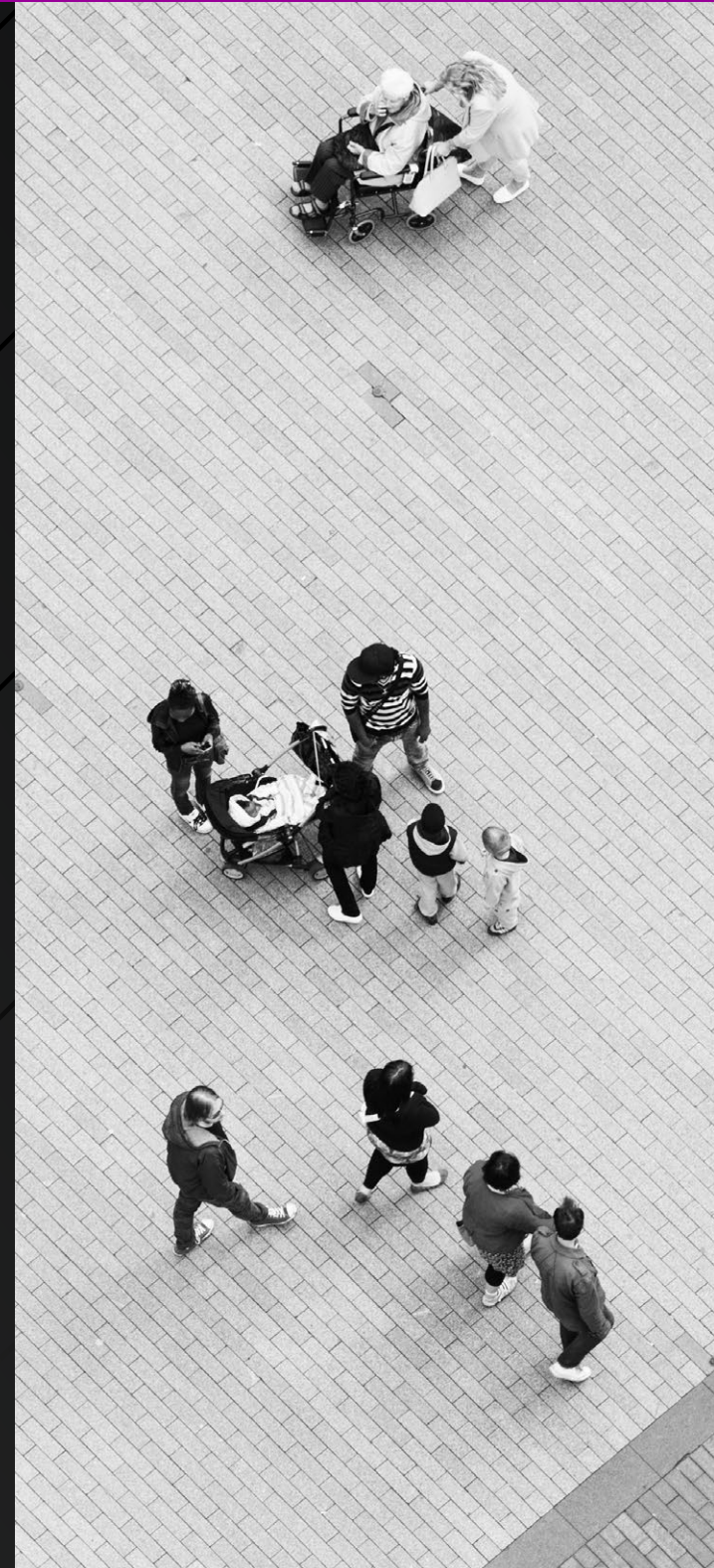
Better Data Governance and Content Management: Lessons from 5 Companies

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Contents

Overview

Organizations are becoming highly adaptive and agile to keep up with the ever-evolving demands of consumers and the market. This has pushed many organizations to accelerate their digital transformation efforts in order to remain competitive and better serve their constituents—and there's no sign of slowing down. Statista estimates that global investment in digital transformation is expected to increase significantly between 2022 and 2025, from $1.8 trillion to $2.8 trillion.

While a recent Rocket Software survey on the state of the mainframe showed that the mainframe—due to its reliability and superior security—is here to stay, many organizations are moving to hybrid infrastructure with a "cloud-first" approach to operations. A key component to the appeal of cloud-first business models is cloud technologies' ability to simplify processes and streamline workflows through integration and automation.

This is especially true for content management operations looking to navigate the complexities of data compliance while getting the most from their data. According to IBM, humanity creates an estimated 2.5 quintillion bytes of data every day (that's 2.5 followed by 18 zeros!). IT professionals tasked with managing, storing, and governing this flood of information need help. Content management solutions can simplify data governance and provide the tools needed to simplify data migration and facilitate a cloud-first approach to content management.

Through a combination of expert insights, customer stories, and conversations, we'll explore the ways in which Rocket Content Services is uniquely suited to help manage data to drive greater cost savings, visibility, and increased agility that will help fuel any migration efforts, through the experiences of five companies who have found success. The experiences will show that no matter what part of the journey an organization is on, better data governance and content management is attainable.

> Mainframes continue to be an important part of IT infrastructure, with 67% of Fortune 100 companies relying on them.
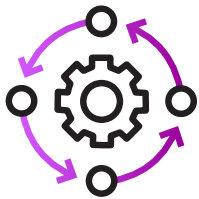>
> —Source: State of the Mainframe Survey

Leveraging Content Management Software to Facilitate a Cloud-First Approach

Here are some of the essential features cloud-first businesses should look for in content management software.

Enhanced Content-Rich Automation

Data analysts looking to streamline content processes need a content-rich automation software that allows them to easily design and deploy workflows, integrate processes, and customize applications. The best modern content solutions leverage low-code/no-code process and presentation services to streamline the construction of business applications and provide a secure and collaborative platform for execution. This gives companies the ability to quickly adopt software and processes and implement innovative methodologies—like DevOps and Continuous Integration Continuous Development (CI/CD) testing—to consistently improve operations, bring products and services to market faster, and develop better customer outcomes.
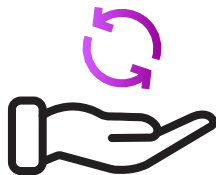
Expanded Collaboration Support

Digital transformation brings about a lot of change—in technology, processes, communication channels, and so on. To minimize business disruptions and avoid misunderstandings or the mismanagement of important information, it's critical for teams to maintain healthy communication and collaboration throughout transformation. Nothing can hinder digital team collaboration more than a lack of connectivity. As much as content management teams need to stay connected in order to maintain data integrity and compliance, so too does their content software. Teams need a highly integrative content management technology that can connect them across third-party vendors and popular communication (Slack, Microsoft Teams) and management tools (Microsoft Sharepoint® and 365) to centralize internal communications and shared information.

> Rocket® Software's Mobius Content Services Suite of technologies delivers the agility and adaptability needed to make the most of your content while maintaining compliance.
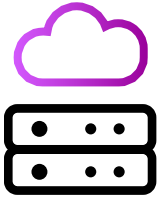
Extended Cloud Governance

The move to cloud-first operations brings both positives and negatives for content management teams. Implementing a cloud data management operation provides teams with unparalleled data availability, mobility, and visibility. However, cloud applications are less secure than mainframe environments and increase vulnerabilities to data breaches. To combat these cloud-based challenges, businesses must look for content management solutions that support immutable cloud storage technologies, like AWS Object Lock, which allows users to store data using a write-once-read-many (WORM) model that mitigates tampering by disabling the ability to edit content once it's stored.
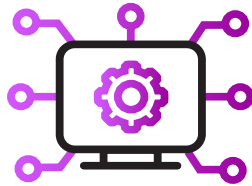
Modernized Infrastructure Deployment

Manual data migration can be a heavy lift for content management teams. Each piece of valuable information must be manually pulled, copied, reformatted, and moved to the new cloud system. While these tasks are not difficult, they're tedious and vulnerable to mistakes that can delay operations or jeopardize valuable information. Also, these tasks pull employees away from more important content governance tasks— such as dynamic workload distribution, managing unstructured data, and standardized app development—which can leave an organization vulnerable to missed opportunities and regulatory infractions. Organizations need content management tools to facilitate migration efforts, streamline processes, and mitigate business disruptions. Teams need software that can automate the tedious, manual processes involved in deploying, managing, and scaling containerized applications while maintaining the integrity

Mobius Content Services provides content-rich automation, modernization deployment, and connectivity to streamline processes, facilitate collaboration, and support a business's transition to a cloud-first approach.

and security of essential documents throughout cloud migration. By eliminating the potential for human error, employees will be free to focus on more business-critical content management tasks.

Here are just a few examples from companies that leveraged Rocket Software's Content Services Platform to fuel their modernization journeys.

Hastings Mutual Insurance:
A Proactive Approach to Modernizing Content Management

For over 130 years, Hastings Mutual Insurance Company has served and protected its clients throughout the Midwest. The regional insurance agency, with nearly 600 agencies and 500 employees, has provided security and peace of mind to customers of all shapes and sizes, from small personal family policies to larger insurance packages that have helped to protect farmers and businesses from the unexpected. With over $1 billion in total assets, the company has grown significantly since its humble beginnings in 1885. Still, Hastings continues to pride itself on its relationships and the care it provides its customers. That's why Hastings Mutual decided to look closely at how it managed and distributed its content to its clients.

Since the early 1980s, the company has used an in-house Policy Administration System (PAS) with what is today Rocket Software's Mobius Content Services Platform to classify, manage, and grant access along its mainframe to more than 4,000 unique document types. Although current operations were running optimally, Hastings understood that its PAS's lack of integration with modern technologies would eventually create issues. Hastings management decided on a proactive approach, taking on the challenge of modernizing its existing mainframe operations to an open-source environment to remain competitive in future markets. In its push to modernize, the regional insurance provider also believed updating its client viewing system to provide a more intuitive, user-friendly experience would benefit its customers and employees alike.

Since 1885 **Hastings Mutual**
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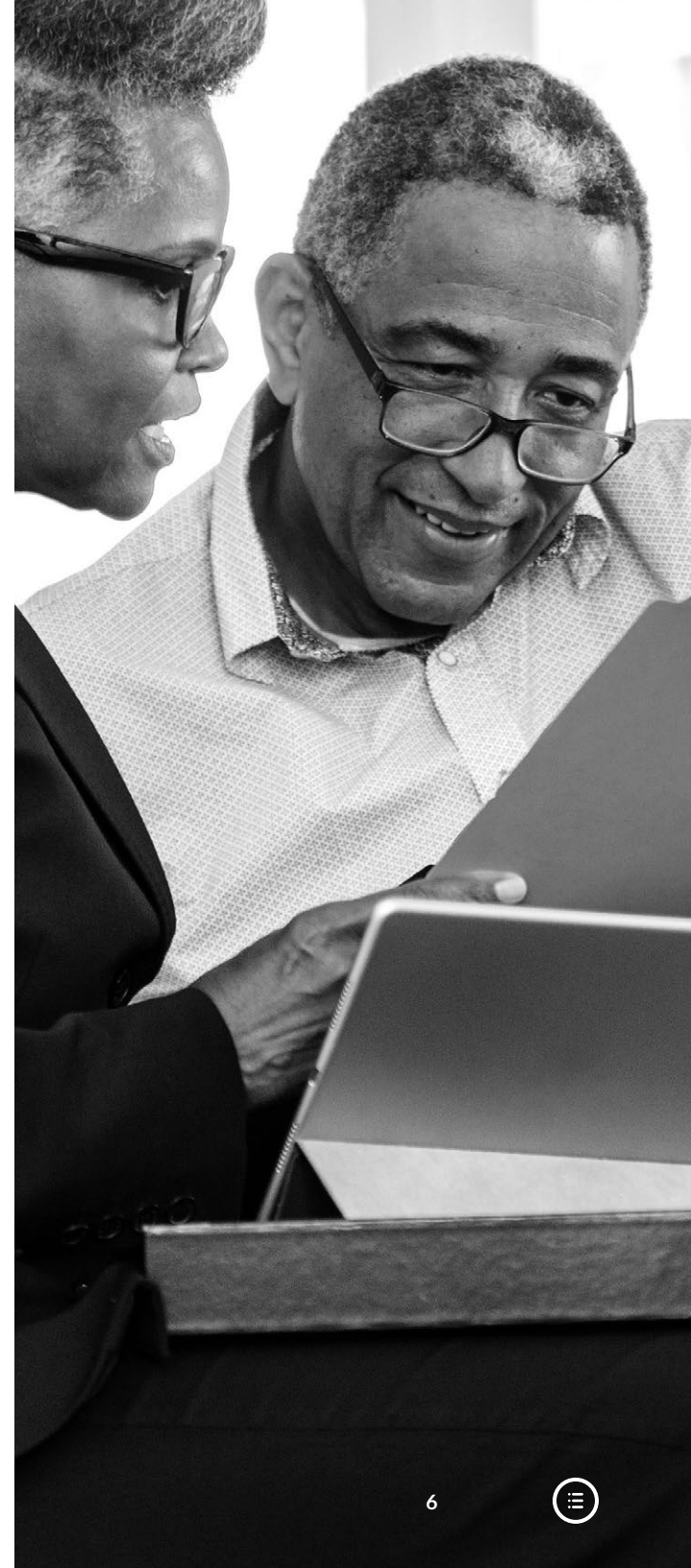
The Challenge:
Preserving Historical Data

While migrating information from the mainframe to open source comes with its own obstacles, Hastings Mutual faced even greater challenges. The company had been developing and storing mission-critical documents and information on its old infrastructure for over three decades—including regulatory, accounting, and workflow documents. Not only would Hastings need to find a way to continue generating these documents throughout the migration process, but it was also essential to maintain the integrity of its historical documents and information during its transfer onto open-source systems. Failure to do so could lead to regulatory sanctions and even legal implications.

With limited resources and a lack of experience with mainframe migration, Hastings realized it needed help to clean up its Logical Partition (LPAR), preserve the integrity of its historical documents, and successfully downsize its mainframe operations—all while maintaining fluid operations.

The Solution:
Finding the Right Support for Mainframe Migration

When Hastings set out to tackle this challenge, they again turned to Rocket Software, whose Professional Services team got to work immediately to assist Hastings' operational team in the clean-up of its existing LPAR environment. Together, the teams went through each historical document within the LPAR to rename and properly segment it for migration to the correct open-source system.

Once documents were properly classified and stored within the LPAR ecosystem, Hastings turned its attention to mainframe migration. Hastings was able to modernize its mainframe operations while still utilizing its PAS in conjunction with Mobius Content Services to generate critical documents on its mainframe. After generation, the documents were automatically duplicated and safely transferred to the proper open-source environment. And Hastings was able to begin the migration of its historical documents safely and securely from the mainframe to its open-source systems.

Results:

Improving Customer Experience

Hastings' pivot to a more innovative web client has also been essential to the migration's success and the company's growing customer satisfaction. Now, end users can access Hastings' digitized documents with the click of a button—reducing document latency and making high-priority documents available within seconds rather than minutes. And having an intuitive open-source viewing system has empowered Hastings' end users to find critical information faster and without the hassle of asking for assistance.

The Benefits of Great Partnership

As a result of the project, Hastings Mutual continues to successfully move toward a hybrid open-source infrastructure. The company was able to modernize its operations to produce, store, and distribute documents to its clients faster, more securely, and at a lower cost.

Throughout the migration process, Hastings has not missed a beat. As a regional insurance provider, the ability to continue to provide outstanding service to clients when they need it the most has been pivotal.

Hastings leveraged Rocket Software's Mobius Content Services to generate critical documents on the mainframe, modernizing operations while still utilizing its PAS.

Q&A:

How A Large Financial Services Firm Prepared for New Financial Regulations in 2022

This large financial services firm is the world's largest custodial bank and asset servicing company, with offices in 35 countries. Custodial banks are different from traditional commercial banks and as such they go to market differently to meet their customers' specific needs. The director of Enterprise Data Governance, spoke at Rocket Software's user conference, EVOLVE, where he described their role as a "banker's bank."

With over $41.7 trillion under custody and/or administration and $2.2 trillion assets under management. They provide investment management and wealth management services to customers all over the world. This means staying on top of complex and diverse financial regulations is critical.

The burden of financial regulations is growing increasingly heavy. From SOX to GLBA, it seems there are endless acronyms by which to abide. With new regulations looming, data governance professionals focused on ensuring their organization understood and could demonstrate how their data is managed.

Read on to hear from Director of Enterprise Data Governance on how they accomplished this.

Q: What role does data governance play in meeting your goals?

A: Financial institutions aim to enhance revenue, reduce expenses, and stay compliant to best serve our customers. Compliance defines how we are able to work with clients and internally ensure there is integrity in the market space. Our goal is to use data governance processes and technology to respond to, and prepare for, changes in the regulatory environment. It's important to understand how compliance issues impact expense reduction. If you look at it from a data quality standpoint, you can see that companies lose about 12% of their revenue to bad data.

An average of 12% means trillions of dollars collectively lost to poor data quality. Why is that taking place? What are the impacts of poor data management?

Time and resources spent looking for data, organizing data, and preparing it to be more easily digestible all contribute to that figure. Whether it's to understand the provenance of our data or the net effect of downstream data from point of conception to consumption, it's critical to maintain data quality and compliance to avoid those expenses or hefty regulatory fines.

What changes will institutions need to make to manage compliance? What results can that bring?

As we see these changes in the banking industry over the next few years, we need to look at the tools and technologies we have at our disposal to not only stay compliant but leverage our data more effectively. Companies with better data management perform better – 75% of companies with top tier data cultures are 49% more likely to exceed their revenue targets. McKinsey found that data users spend 30-40% of their time searching for data if a clear inventory is not available.

What are some of the trends in data governance you're seeing right now?

To implement technologies to better support these regulations, we need to improve analytical properties. Data governance tools are extremely effective at lineaging data, but there are inefficiencies in how tools are implemented. We've lineaged 1,900 applications with Rocket Intelligence. The lineage charts we can now produce allow us to support regulatory requirements and show the provenance of data.

12%
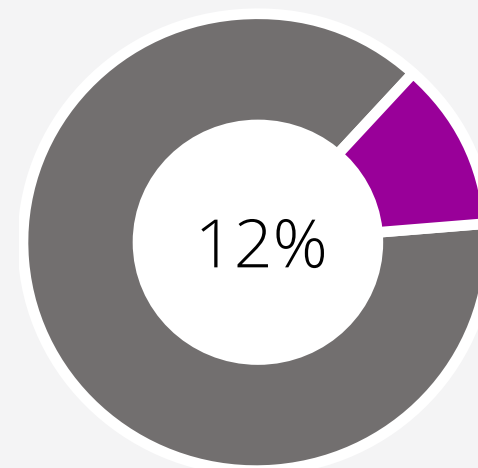
Bad data can cost businesses 12% of their revenue.

We've lineaged 1,900 applications with Rocket Data Intelligence. The lineage charts we can now produce allow us to support regulatory requirements and show the provenance of data.

Q&A:

How Huntington Bank Democratized Data Accessibility

Huntington Bank is a full-service banking provider operating in Ohio, Colorado, Illinois, Indiana, Kentucky, Michigan, Minnesota, Pennsylvania, South Dakota, and West Virginia. The bank's "Welcome" philosophy focuses on deep relationship-building capabilities that help customers get the personalized service they need to make the best financial choices possible. To make this a reality, it is essential that all bank staff have self-service access to data – and that the data makes sense to them, no matter their role.

The Rocket Software team had the opportunity to sit down with Shaun Rankin, Huntington Bank's senior vice president of Information Governance, to discuss the steps he took to make data understandable for users across the organization.

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A key part of our enterprise data strategy has been to expand data access across all bank staff. To meet this goal, we needed to make it easy for staff to access – and understand – information on their own."

SHAUN RANKIN
Huntington Bank's Senior Vice President of Information Governance

Q: Why is data governance so critical to Huntington Bank's goals?

A: As a large bank, we have massive amounts of data flowing through our organization. But our systems and processes for managing that data were no longer meeting our needs. In fact, they were slowing down our ability to understand where data was coming from, where it was going, and who was using it. This made it impossible for us to leverage that data to drive the business forward.

What steps did you take to meet this goal?

With more nearly 12,000 employees across the American Midwest, we focused on centralizing knowledge and decentralizing understanding. Our goal was to make data assets available in intuitive vernacular that could be easily understood.

A key part of this strategy was the use of metadata components. We started by using Rocket Data Intelligence to analyze our use of metadata. My team focuses on customer accounts, transactions, and interactions, with data feeding into our ecosystem from over 40 sources. We started with customer data and worked to understand how it flows into our data warehouse, whether it can be located on a data mart, and where it is being used.

With so much data in our warehouse, the task was daunting, but Rocket Data Intelligence helped us to visualize the lineage, identifying where there were gaps that needed to be plugged, and adding SQL Server Integration Services (SSIS) to plug them. We're currently in the process of scanning the data that process has uncovered and expect to get the full lineage of our ecosystem once that is complete.

Let's revisit the concept of centralizing knowledge and decentralizing understanding. How did you bring that to life?

We set out to expand appropriate access to data for bank staff, with the ultimate goal of creating self-service access and enabling staff to understand where they go to get information. We wanted to present data assets in a vernacular that people of all levels of data familiarity could easily understand. We determined that metadata asset tagging was the best course of action. Training everyone on all the technical ins and outs of metadata curation didn't make sense for our business, so we took an outside-in approach. Instead of starting with the system's knowledge, we looked at our staff's existing processes.

By analyzing and understanding what staff searched for, we were able to develop a process that was similar to what they were already doing but unlocked better results. This helped us focus on action – rather than spending weeks or months trying to define the perfect vernacular, we were able to develop principles that let us dive into the meat of the project – organizing the data. By looking at the empirical evidence within the metadata, we were able to make decisions about what made sense for our specific business. This organization is by no means static – our first attempts at organization look nothing like what we've ended up with today, and reviews still happen on a bi-weekly and monthly basis.

> The final step of this project will be to take the organization one step further, adding business segments on top of the data domains, making it even easier for staff to access and understand data.

M&T Bank:
The Importance of Human Relationships in Modernization

M&T Bank is a community-focused banking franchise with approximately $140 billion in assets, and a network of 700 branches across New York, Virginia, and the District of Columbia. They offer advice, guidance, expertise, and solutions across the entire financial spectrum. M&T's purpose is to understand the individuals and the businesses in their neighborhoods, so they can create the right opportunities for the people they serve.

M&T recently vowed to recommit its focus on serving customers. The company began to embrace an agile operating model and insource technology talent, knowing that to remain competitive, speed to market was critical. To achieve its goals, M&T knew it needed to make its mainframe data stores and processes accessible to other computing platforms in near real-time. Considering the security, interoperability, and usability that are unique to mainframe environments, M&T looked to Rocket Software to execute its plan to modernize.

M&T Bank

Finding the Right Solution and Partner

The bank chose to partner with Rocket Software on a Digital Integration Hub (DIH), an architecture that synchronizes deployment for efficient access to mainframe data, limits business disruptions, and simplifies the development process.

The solution consumes data continually, which produces consistent, up-to-date information, and generates more accurate results. More importantly, the data can be accessed anywhere, anytime for reuse in other transactions or analytics systems in near real-time. It is also accessible with a self-service model, which reduces business disruption. By having information centralized, employee workflows—from DevOps to customer service—are streamlined.

Putting a Focus on Customer Service

Rocket Software's input helped inform M&T's decisions and track progress so that developers could effectively test new solutions and determine how they add value. The human side of modernization or digital transformation can often get lost, but Rocket Software places an emphasis on building human relationships throughout these processes. By doing so, Rocket Software helped M&T employees prepare to execute solutions and promoted collaboration in each successive phase.

Great customer service is the cornerstone of a great partnership. When modernization teams consistently provide the highest levels of customer support to their customers, like M&T, it allows for customization of the software itself to make sure all needs are being met. It's a true partnership at work.

The Benefits of Exceptional Customer Service

Through its partnership with Rocket Software on this project, M&T saw clear results from its modernization journey that expanded beyond the technical benefits. M&T was able to meet major milestones thanks to the relationships and skills Rocket Software built, allowing for M&T teams to feel comfortable and ready to deploy the solution effectively. And lastly, M&T felt comfortable through the modernization process because it knew it could expect speedy responses from the Rocket Software team on any questions.

Modernization is not just about having the right tools. The biggest challenges often arise in shifting the organizational mentality surrounding transformation, which is why Rocket Software prioritizes sharing ideas through collaboration and communication to

Partnering with Rocket Software on its DIH, M&T was able to generate more accurate, up-to-date and accessible data, simplifying the development process.

facilitate innovation. It's about building the human relationships needed to execute on bold ideas.

# Consolidation Creates Complexity:

How Pernod Ricard Modernized

Consolidation is happening across industries—even spirits. Acquiring companies can produce a myriad of benefits when they add new brands to the fold, but one resulting downside is internal complexity and confusion caused by different systems and processes. The Pernod Ricard Group, the producer of premium spirits such as Chivas, Absolut, Martell, Ricard and Perrier-Jouet, experienced that very challenge.

A global company, Pernod Ricard coordinates 90 subsidiaries across 100 production sites in 80 different countries and employs over 19,000 workers. To track and monitor the entire lifecycle of its spirits, Pernod Ricard used server-based technology. Because of the volume of different products and the complexity in managing associated processes across so many countries and sites, however, it was becoming impractical, and unsustainable, creating a disconnect for prospective IT technicians who are accustomed to working with more agile and accessible systems. In order to both compete for better talent and improve its operations, the company made a decision to forge ahead and build a single web- and mobile-based platform that would serve all main production plants, allowing teams to monitor operations from anywhere and on any device, also enabling the company to implement automation and standardized data collection and management processes across all its brands.

Pernod Ricard
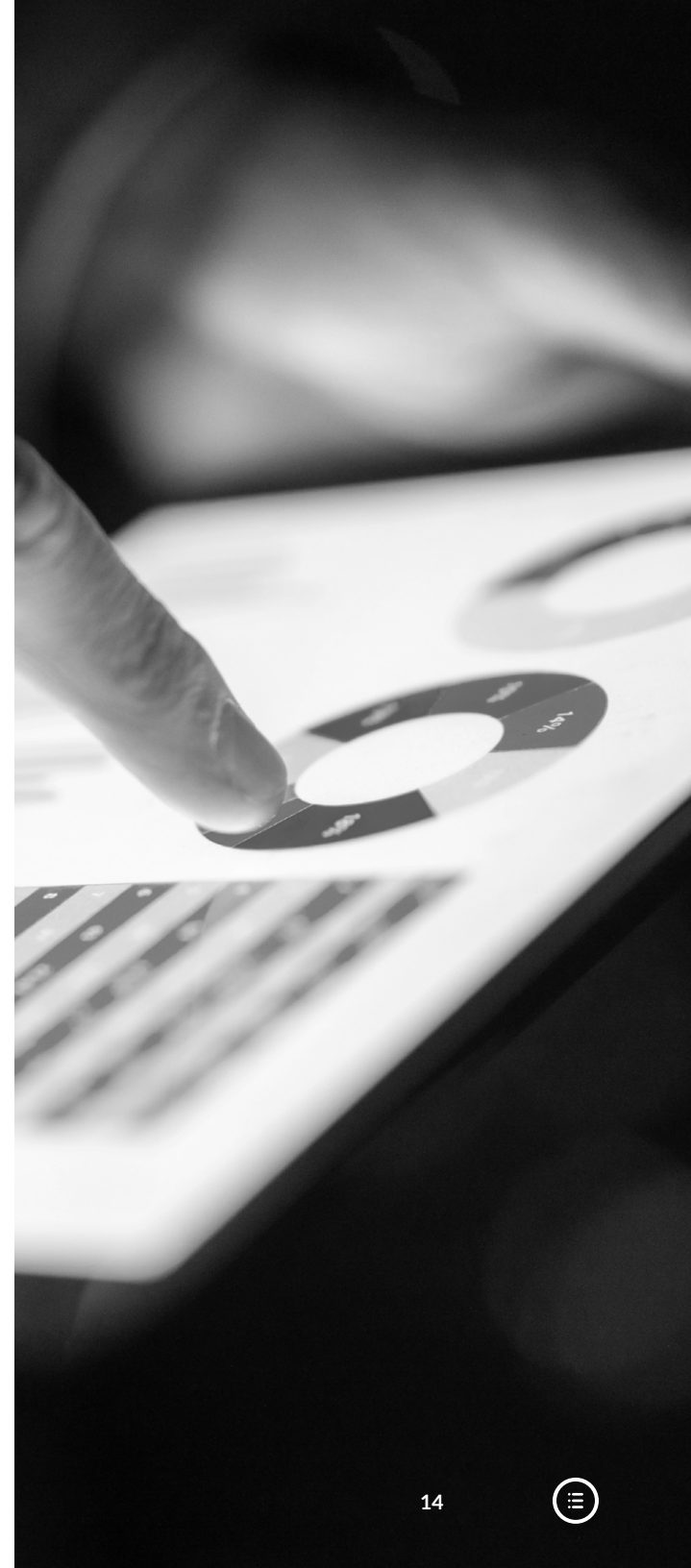
Buy, Build... Or Modernize?

When the company struck out, looking to buy, Pernod Ricard turned its focus internally toward a tool it had used previously that was still performing at a high level. However, that tool had become cumbersome and unsustainable for users. Pernod Ricard determined that modernizing that internal application would deliver the flexibility, adaptability, and agility its users needed – and, at the same time, it would be a selling point for retaining and attracting new IT talent.

While web- and mobile-based applications were critical to the project, Rocket Software —which acquired Uniface, the company that had created the original application—started by revamping Pernod Ricard's 2,500-page ERP, doing away with its outdated and unused pages. A hybrid team of Rocket Software and Pernod Ricard developers then worked hand-in-hand to rethink, reconstruct, and rewrite the framework of Pernod Ricard's application. The team simplified and reduced the application's components from 4,000 to 2,200. To create a uniform platform for managing Pernod Ricard's many brands, the team built the application out brand-by-brand, deploying new functionalities as they went. In doing so, Pernod Ricard hoped to introduce standardized data collection and management processes while still providing its brands with the freedom to implement into the software the different methods and functionalities specific to their operations.

Creating a Better User Experience

In fewer than three years, Pernod Ricard completed its modernization project, cutting the 1.3 million lines of code needed to create the software by 60%, substantially reducing coding times. Since its transition onto a single platform, the Pernod Ricard Group has signed an additional 180 users to its company, a testament to the solution's modernization and innovative allure to the next generation of talent.

By automating its barrel reservation and Cognac QA process, employees save two days of work per month on average, which allows teams more time for value-driven tasks. And newly integrated automation is helping to streamline Martell's cask inventory operations. On the old platform, employees could complete the physical process of "debonding" and content measuring at a rate of 7,000 to

Pernod Ricard leveraged Rocket Software to revamp its 2,500-page ERP, working together to reduce their application's components from nearly in half from 4,000 to 2,200.

8,000 barrels daily. Since adding automation capabilities, employee workloads have been reduced and teams can now complete between 12,000 to 14,000 barrels per day, saving Pernod Ricard both time and money.

Faced with few options, Pernod Ricard chose to modernize and it's paying big dividends for its digital transformation efforts. Next time you're contemplating some combination of new hardware and/or software to address operational challenges in your business, the answer to those challenges may already be in-house.

Make the Most of Your Content Management

Whether you're a major bank, insurance company, or a global leader in wine and spirits, digital transformation has become critical to sustained success and capturing greater market share. And—regardless of the industry—data has proven to be equally important. As digital transformation initiatives continue to push forward, companies from large enterprises to small businesses are starting to churn out copious amounts of data. The key to gaining a meaningful competitive edge in today's marketplace lies with that high volume of data. Tapping into that data means modernizing your content management and governance tools and processes.

No matter the requirements, Rocket Content Services delivers a platform capable of helping you govern and support content lifecycles and applications. Tools like Rocket Mobius add critical support that empowers businesses to reduce costs and simplify operations and experiences while also connecting all of your data with a single view and API capturing information across content silos. Wherever you are in your modernization journey, Rocket Software has the knowledge and solutions to help get a handle on any and all data that exists across the entire enterprise.

Rocket Content Services is ready to help you unlock the full potential of your data—Find out how.

About Rocket Software

Rocket Software partners with the largest Fortune 1000 organizations to solve their most complex IT challenges across Applications, Data and Infrastructure. Rocket Software brings customers from where they are in their modernization journey to where they want to be by architecting innovative solutions that deliver next-generation experiences. Over 10 million global IT and business professionals trust Rocket Software to deliver solutions that improve responsiveness to change and optimize workloads. Rocket Software enables organizations to modernize in place with a hybrid cloud strategy to protect investment, decrease risk and reduce time to value. Rocket Software is a privately held U.S. corporation headquartered in the Boston area with centers of excellence strategically located throughout North America, Europe, Asia and Australia. Rocket Software is a portfolio company of Bain Capital Private Equity. Follow Rocket Software on LinkedIn and Twitter.

The future won't wait—modernize today.

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