



# Brown Brothers Harriman

Brown Brothers Harriman & Co. (BBH) is one of the oldest and largest private banks in the US and has a network of over 5000 advisors requiring universal access to information of their customers and their financial dealings. BBH had implemented Informatica MDM 9.7 as part of their Know-Your-Customer (KYC) initiative and leveraged services from Informatica for maintenance and enhancement. In January 2017, BBH turned to Globalsoft to partner up as their MDM services provider to help them define and execute on their vision for Master Data Management.

*“With Globalsoft’s help, we have significantly extended the scope of their MDM solution. We rely heavily on their expert knowledge of MDM to help us implement change in on-going processes.”*

- Sr. Vice President, BBH, NJ

## Objectives

BBH wanted to expand the value provided by their MDM solution, so needed a trusted partner that could help them define their MDM vision and strategy, and provide execution using a cost-effective team.

Required to achieve these objectives;

- Experienced MDM solution architect embedded within BBH to help define strategy and lead execution
- Offshore team for execution that provides cost-effective expertise and scale of resources
- A combination of strategy, development, and maintenance

## Use Case

Globalsoft quickly provided a senior MDM consultant to refine their MDM strategy and develop a short-term plan. This included assigning a seasoned MDM Architect to a dedicated role embedded within BBH and assembling an offshore team of MDM specialists, including Java resources for web services development.

This team has been able to execute on a variety of projects that are part of the longer-term vision of BBH:

- **KYC | Know-Your-Customer**  
Bug fixes and enhancements to KYC interaction with MDM so that it functions as expected
- **ASL | Authorized Signatory Lists**  
Set up ASL verification process within the solution to significantly reduce the risk of fraud. By storing data centrally in MDM Hub, BBH can now prevent duplicates of signatories requiring access to information.
- **Match & Merge**  
Designed a system to periodically run Batch jobs based on match and merge rules defined in MDM, that helps BBH find possible duplicates, or identical match (and merge as required) to create a golden copy of the clients.
- **AnaCredit | Analytical Credit Datasets**  
A process for On-boarding of data from different sources into MDM, generate and send automatic reports containing detailed information on individual bank loans in the euro area.
- **Upgrade to MDM 10**  
Upgrade MDM from version 9.7 to version 10.2 for enhanced functionality and continuity of vendor support.

During the execution of these projects, Globalsoft continues to help BBH refine their vision and plans for MDM.

Globalsoft provides Application Support for all MDM instances across multiple environments.

## Results

BBH now have a centralized system to fetch data from different sources which can ensure all their information is consistent and accurate throughout the organization. Following the success of the initial project, BBH extended their partnership with Globalsoft to implement long term changes in Dec 2017 indefinitely.

### Company Profile

**BROWN**  
**BROTHERS**  
**HARRIMAN**

140 Broadway  
New York, NY  
<http://www.bbh.com>

Sector: **Investment Banking**  
Industry: **Banking & Wealth Management**  
Full Time Employees: **5000+**

### About Globalsoft

Globalsoft, Inc. delivers cutting-edge technology products and consulting services to users of MDM software. We have the industry's deepest expertise in Informatica MDM and Reltio Cloud, based on years of outstanding client service and a proven track record of successfully helping software vendors across a wide range of industry segments meet their customer's needs.

Globalsoft is unique in its ability to deliver exceptional value to both solution-owners and solution-providers. Our experience working with clients to solve their challenges provides us with customer insight when working with vendors and their products. And our intimate knowledge of a vendor's technology allows us to assist clients with greater breadth and depth.

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