27GLOBAL℠

CASE STUDY

Microsoft Solutions Partner
Digital & App Innovation
Data & AI
Azure

## ABOUT THE CLIENT

A leading healthcare SaaS provider, offering practice management, clinical, and billing software tailored for therapists. Their solutions focus on reducing administrative burdens, allowing healthcare professionals to spend more time with patients.

## OPPORTUNITY: Unifying Fragmented Customer Data Across the Enterprise

The client operates numerous independently developed SaaS applications and frequently acquires new brands, resulting in highly fragmented customer data spread across 16 different systems. Each application is hosted on different cloud platforms with unique architectures and database schemas, making it difficult to maintain data consistency and accuracy. Without a centralized data management solution, the client struggled to consolidate customer, product, and billing data into a single source of truth, impacting sales workflows and reporting.

Additionally, ensuring Salesforce data integrity was a challenge, as discrepancies across multiple instances led to inefficiencies in sales operations and customer relationship management. The lack of scalable, cloud-based analytics further limited the client's ability to derive meaningful business insights and make data-driven decisions.

## SOLUTION: Implement Databricks-Powered Customer Data Platform

The client partnered with 27Global to design and implement a cloud-native data management solution, leveraging Databricks and Azure Data Factory to ingest, transform, and manage master customer data. The new data warehouse serves as the authoritative source, feeding Salesforce, reporting tools, and business processes. To achieve this, 27Global executed a multi-phase strategy that included the following key initiatives:

### Data Strategy & Discovery Phase

27Global conducted a discovery phase to assess the client's data landscape and define the target-state cloud architecture. This phase included a data maturity assessment to identify gaps in data quality and infrastructure, a defined target architecture to support the Databricks-based cloud platform, and a master data strategy establishing governance policies and standards. Additionally, 27Global developed an implementation roadmap outlining an iterative, phased approach to ensure smooth execution.

### Infrastructure & DevOps Setup

Before data ingestion, 27Global deployed an automated cloud infrastructure using Infrastructure as Code (IaC) principles. This included provisioning scalable environments (Dev, Test, Prod) on Azure, deploying Databricks clusters for high-performance ETL processing, and implementing security and monitoring tools such as Azure Security Center and Log Analytics. These foundational elements ensured a reliable and secure environment for all subsequent data operations.

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## SOLUTION: Continued...

### Active Customer Data Mapping

With the infrastructure in place, 27Global built Databricks-based ETL pipelines to ingest and transform customer data from 16 disparate applications. This process included implementing Master Data Management (MDM) strategies to unify customer records and integrating product and asset data from multiple Stripe accounts, SharePoint flat files, as well as SQL and Mongo databases. By centralizing and standardizing all customer-related data, this phase established a single, authoritative source for customer insights and business intelligence.

The data ingestion process was strictly limited to customer account and operational data. No PHI was included in the scope of this solution, ensuring compliance with regulatory and privacy requirements. This approach allowed the client to gain valuable business insights while maintaining strict data security boundaries.

### Salesforce Data Management & Migration

To enhance data accessibility and usability, 27Global facilitated a one-time migration of Salesforce data to a new instance while implementing a continuous synchronization process. Survivorship logic was developed to maintain data accuracy and prevent inconsistencies across systems. This ensured real-time updates between Salesforce and the data platform, improving data integrity and streamlining sales workflows.

### TECHNOLOGY STACK

**Cloud Platform**
*Microsoft Azure*

**Data Processing/Analytics**
*Azure Data Factory*
*Azure Databricks*

**Storage**
*Azure Data Lake*
*Azure Databricks Delta Lake*

**Security & DevOps**
*Azure AD*
*Azure DevOps (CI/CD Pipelines)*

## BUSINESS IMPACT

By leveraging Databricks and Azure Data Factory, the client now has a unified customer view with consolidated data from 16 applications, ensuring seamless integration with Salesforce and real-time updates for data consistency. The implementation of Apache Spark-powered ETL workflows enables high-performance data processing, allowing the client to efficiently manage large-scale transformations. With enriched customer data, the client gained deeper business intelligence, supporting more informed decision-making and targeted marketing opportunities. Additionally, the solution ensures compliance with industry regulations by maintaining secure and auditable data management practices within the Azure cloud environment.

## CONCLUSION

With 27Global's expertise in Databricks and cloud data engineering, the client now has a scalable, automated, and integrated customer data management platform. This future-proof data architecture enables real-time Salesforce updates, improved business intelligence, and long-term scalability in the healthcare SaaS industry.