

Architecting a Regulator–Grade Enterprise Data & AI Foundation

How 360Vantage Labs built CFP's enterprise data platform, zero-trust DevOps pipelines, Microsoft Purview governance, ADLS document engine, and Snowflake AI pilot.

RECONCILED

1M+ validated transactions

GOVERNED

6 domain owners & Purview

AUTOMATED

4 isolated IaC environments

FUTURE-READY

Snowflake pilot & AI framework

Program Impact at a Glance

22

Active Reports

In active production use out of ~50 in the portfolio.

1M+

Transactions

In scope of automated validation and audit reconciliation.

4

Environments

Isolated Dev, QA, UAT, and Production tiers.

6

Data Owners

Assigned to the active Data Governance Council.

The Imperative for Regulator-Grade Insurance Data

CALIFORNIA PROPERTY & SURPLUS LINES

Auditability Is Non-Negotiable

State-backed property pools (like the California FAIR Plan) and Surplus Lines organizations face unprecedented transaction surges and statutory scrutiny.

01 · Cross-Domain Silos

Policy, Claims, and Finance datasets often diverge during peak volume cycles.

02 · Manual Deployment & Credential Risk

Standing credentials and unversioned infrastructure create severe audit exposures.

03 · Unstructured Document Overload

High-volume email attachments lack automated metadata tagging for enterprise portals.

End-to-End CFP Data, Document & AI Blueprint

01 • ENTERPRISE SOURCES

Core & Broker Channels

- Policy, Claims & Finance
- Salesforce Broker Portal
- Inbound Email Streams



02 • UNIFIED DATA & DOC CORE

ADLS + Clarity + Snowflake

- Clarity Stabilized (1M+ Txns)
- ADLS Rules & Metadata UI
- CFP-Owned Snowflake Pilot



03 • CONSUMPTION & AI

Regulatory & AI Layer

- 22 Active Prod Reports
- Release 3 Regulatory Feeds
- Enterprise Doc Portal & AI

GOVERNANCE PLANE • MICROSOFT PURVIEW

6 Domain Owners • 7 Quality Dimensions • Tiered CDEs

DEVOPS PLANE • 4 ISOLATED ENVIRONMENTS

100% IaC with Weekly Drift Detection • Managed Identity & Key Vault

Data Platform & Regulatory Reporting

MULTI-DOMAIN REPORTING

Sustained Across Three Domains

22 production reports active across Policy, Claims, Finance.

COMPLIANCE INTERFACES

Release 3 Delivered

Mandatory statutory regulatory interfaces deployed on schedule.

AUDIT RECONCILIATION

September Audit Window

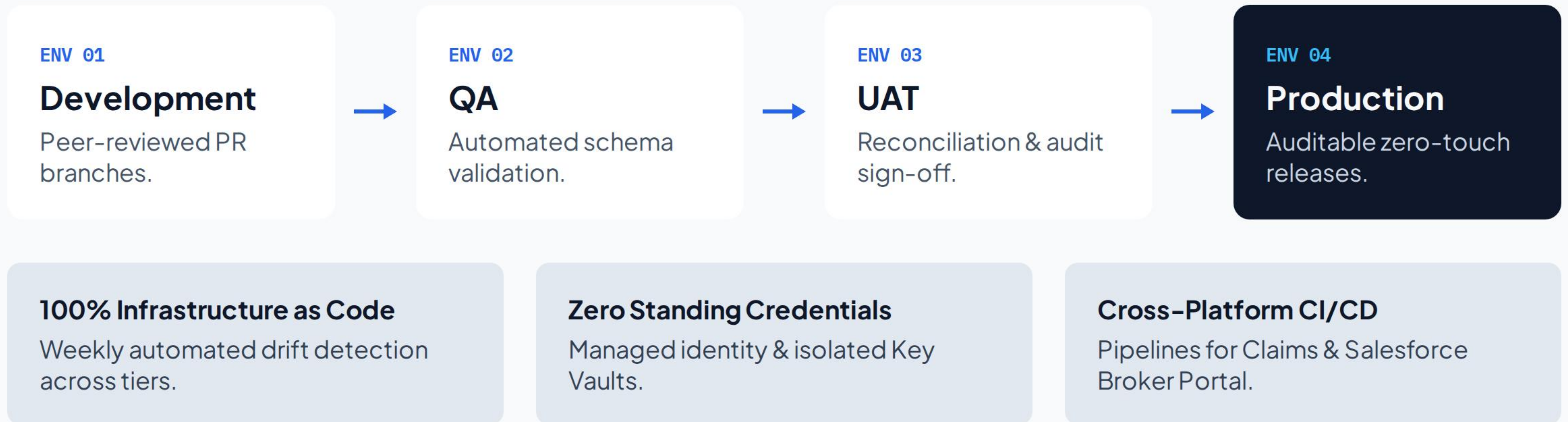
1M+ transactions validated with complete audit evidence.

CORE STABILITY

Clarity Platform Stabilized

Reliable operational execution across daily reporting cycles.

Zero-Trust DevOps & Platform Engineering



Enterprise Data Governance & Purview



Council & 6 Owners

Steering committee operating with six domain owners.



7 Quality Dimensions

Drafted Data Quality Policy with tiered CDEs.



Microsoft Purview

Selected as the enterprise catalog and lineage platform.



Cultural Adoption

Monthly governance newsletters and active office hours.

Reusable Pattern for Surplus Lines California: Council, Data Owners, and Audit Evidence.

REGULATOR-GRADE BLUEPRINT

ADLS Enterprise Document Platform

PRODUCTION MILESTONE

Phases 1 & 2 Live

In active daily production use on Azure Data Lake Storage (ADLS), serving as the backbone for the enterprise Doc Portal.

1. Automated Email Ingestion

Captures inbound underwriting and claims correspondence directly into ADLS storage zones.

2. Rules-Based Processing Engine

Classifies, routes, and validates unstructured attachments using deterministic business logic.

3. Metadata Management UI

Empowers business stewards to govern document schemas for the upcoming Enterprise Doc Portal.

AI Decision Framework & Snowflake Pilot

ENTERPRISE AI STRATEGY

The Magic & The Rehearsal

Executive Proof of Concept: Demonstrated live to leadership with clear operational value.

AI Use Case Framework: Established as the formal decision lens for prioritization.

Disciplined Engineering: Rigorous data preparation ("the rehearsal") behind every AI outcome.

CLOUD DATA MODERNIZATION

CFP-Owned Snowflake Pilot

Rapid Execution: Claims pilot in its fourth week and nearing full completion.

Client-Owned Architecture: Gives CFP sovereign control over elastic analytical compute.

Surplus Lines Blueprint: Replicable governance and audit model for California regulators.

Unexplored Ideas: Storage & Governance



Zero-Copy Iceberg Mesh

Snowflake External Tables querying ADLS Iceberg files without storage duplication.

Executable Purview Gates

CI/CD quality circuit breakers enforcing all 7 quality dimensions automatically.



Clean-Room Regulatory Feeds

Live Snowflake Data Clean Rooms replacing batch statutory file transfers.

Next-Horizon AI, FinOps & Broker Capabilities

Capability Area	Foundation Built Today	Unexplored Next Horizon	Business Impact
ADLS Doc Engine	Rules engine & metadata UI	Multimodal Vision-LLM Indexing	Auto-extracts property inspection PDFs
Broker Portal	Automated Salesforce CI/CD	Real-Time Reverse-ETL Insights	Live CAT & quote metrics for brokers
IaC DevOps	Weekly drift detection	Continuous Self-Healing + FinOps	Real-time cost attribution per report
Report Portfolio	22 of ~50 reports in prod	Semantic Layer Self-Service BI	Consolidates remaining 28 reports

360VANTAGE LABS · ENTERPRISE DATA & AI PRACTICE

Build Your Regulator–Grade Data & AI Foundation

Proven across California Property and Surplus Lines—combining zero-trust DevOps, Microsoft Purview governance, ADLS document engines, and Snowflake AI.
