

How Fiserv Secures M&A Success with Continuous Compliance



EXECUTIVE SUMMARY

As millions of sensitive records move during M&A events, protecting them isn't just about risk mitigation - it's about preserving deal value and meeting the regulatory demands of global finance.

Strategic M&A Requires More Than Just Numbers

In the high-stakes world of mergers, acquisitions, and divestitures (M&A), financial projections often take center stage. But for Fiserv, a global fintech leader operating in over 100 countries, success hinges on something more foundational: data compliance, security, and governance. As millions of sensitive records move during M&A events, protecting them isn't just about risk mitigation - it's about preserving deal value and meeting the regulatory demands of global finance.

The Challenge: Untangling Complexity in the Financial Services Industry

Fiserv operates in one of the most highly regulated industries in the world. During M&A activities, they face a tangle of challenges:

- **Data Sprawl & Entanglement:** Acquired data estates come with varying levels of sensitivity, including MNPI, customer PII, and employee records, often restricted by data sovereignty laws.
- **Compressed Timelines:** Deal velocity can limit due diligence, exposing acquirers to unseen data risks and compliance gaps.

- **Regulatory Friction:** Institutions must navigate overlapping regulatory frameworks like GDPR, GLBA, PCI DSS, FINRA, and CCPA.
- **Configuration Drift:** Static controls degrade over time, quietly exposing data due to platform changes or misaligned policies.
- **Insider & Third-Party Risk:** Role-based access granted during M&A negotiations often lingers post-deal, risking data overexposure or policy violations.

Fiserv's Approach: Continuous Compliance from Day Zero

Ken Owens, VP of Cyber Cloud Security Engineering at Fiserv, emphasizes that people, process, and technology must align to drive secure, successful M&A outcomes.

“Understanding all your data - whether it’s active or not - is critical in the early stages of an M&A, and BigID is critical in our efforts to find, classify, and protect our most sensitive data”

— Ken Owens, Fiserv

To operationalize this approach, Fiserv applies a set of best practices:

- **Automated Discovery & Classification:** Using BigID to inventory and classify data before deals close, giving teams visibility into risk early on.
- **Visibility into the Full Data Landscape:** Instantly mapping inherited data estates to understand what you have, where it lives, and what controls are in scope - so teams can assess risk, close gaps, and move on M&A opportunities faster.
- **Data Governance Working Groups:** Cross-functional collaboration between legal, security, and governance teams ensures alignment before the ink dries.
- **Adaptive Classification at Scale:** Fiserv’s classifiers come into every acquisition ready to go - and BigID makes it simple to extend them to fit the new landscape, adding fields and data types on the fly without overhead or rework.
- **Quarterly Compliance Attestation:** Moving from annual checks to frequent, automated validations of user permissions and data controls.
- **Policy Drift Detection:** Monitoring for misalignments between expected and actual security configurations with human-in-the-loop reviews.

- **Red Teaming Data:** Proactively testing for exposures by simulating attacks on datasets before, during, and after acquisitions.

BigID: The Data Intelligence & Policy Control Plane

BigID serves as the backbone of Fiserv's compliance framework, automatically discovering and classifying data across cloud and on-prem environments. It allows Fiserv to:

- Detect misaligned or unprotected sensitive data.
- Continuously validate data usage against policy.
- Automate remediation of exposure risks before they turn into regulatory fines.
- Support role-based access reviews to reduce insider risk.

“BigID gives us the visibility and control to enforce compliance not just once a year, but every day. It’s the backbone of our continuous compliance strategy—identifying risk early, validating our security posture constantly, and ensuring we stay aligned as regulations and environments change.”

— Ken Owens, VP Cyber Cloud Security Engineering, Fiserv

Snowflake: The Enforcement and Sharing Layer

With BigID providing visibility, Fiserv uses Snowflake to enforce access policies and share data securely:

- **No Replication Required:** Teams share live, protected data without creating new risk-prone copies.
- **Role-Based Exposure:** Gradually expose sensitive data during negotiations using Snowflake's RBAC model.

AWS: The Trusted Infrastructure Foundation

Fiserv's infrastructure is powered by AWS, where security and scale go hand in hand:

- BigID runs across AWS regions to scan and classify all S3 data.

- Fiserv controls encryption and key management to ensure sovereignty and privacy.
- Snowflake operates natively within AWS, streamlining compliance and performance.

The Outcome: Precision M&A with Continuous Compliance

With BigID, Snowflake, and AWS, Fiserv has built a continuous compliance framework that transforms M&A from a regulatory minefield into a strategic advantage. Key outcomes include:

KEY OUTCOMES

- **Increased Deal Accuracy:** Deeper insight into data risks results in more accurate M&A valuations.
- **Faster Compliance Readiness:** Broad visibility into inherited data estates - combined with expandable controls that adapt to any environment - accelerates both due diligence and post-deal integration without the usual ramp-up time.
- **Reduced Risk Exposure:** Configuration drift and residual access are proactively identified and mitigated.
- **Stronger Shareholder Confidence:** Fiserv's approach ensures that compliance, security, and innovation move in lockstep - even during complex transactions.
- **Acquisition-Ready by Default:** BigID's expansive catalog of supported data sources means Fiserv doesn't have to wonder whether a target's environment is covered - chances are, it already is. That out-of-the-box breadth compresses due diligence timelines and removes a major variable from every deal.

Conclusion: Raising the Bar for M&A Security in Financial Services

By uniting people, process, and technology, Fiserv redefines how financial institutions approach M&A. Their partnership with BigID, Snowflake, and AWS sets a new standard for precision, speed, and control in one of the most sensitive areas of business transformation.

Organizations navigating complex transactions can look to Fiserv as a blueprint: data-first, automation-driven, and compliance-ready from day one.

CUSTOMER VALIDATION

Proof in Action

"BigID gives me better visibility into sensitive data, helps prioritize security protections, reduces attack surfaces, strengthens compliance, and increases operational efficiency overall — a strategic pillar of our AI-First Cybersecurity Transformation"

- CISO, Global Healthcare Company

"We needed to automate processes and data management across systems for the data of a few million customers across a lot of systems and data. BigID was the one solution that did this in the most efficient and sophisticated way - and had more use cases we could add on moving forward."

- Chief Privacy Officer, Global Telecoms Company

ANALYST RECOGNITION

Validated by Industry Leaders

- 2025 Company of the Year for AI Governance - Frost & Sullivan
- Named a Leader across all DSPM research including Omdia DSPM Universe, CB Insights for DSPM, TAG, GigaOm, Frost & Sullivan
- Named a Leader in all Privacy Management evals including Forrester Privacy Management Wave & IDC Privacy Compliance MarketScape
- BigID named a Leader across 4 GigaOm evals: DSPM, Data Security Platforms, Unstructured Data Management, Data Access Governance
- Named in Gartner's 2025 DLP Market Guide
- Named in Gartner's 2025 AI TRiSM Market Guide
- Represented 30+ times in Gartner's 2025 Hype Cycles for Security, Privacy, AISPM

FREE RISK ASSESSMENT

Discover Your Data & AI Risk

An agentless, cloud-native assessment to enable security, privacy, and compliance: pinpoint where sensitive data and AI risks live - and how to fix them.

What You Get:

- Complementary 2 week engagement on real data to gain visibility on risk across data and AI
- Executive-ready report identifying high-risk data and AI across cloud environments with next-step recommendations

NEXT STEPS

Ready to Connect the Dots in Data & AI?

Schedule your free risk assessment or ask for a deeper demo across DSPM, DLP, AI SPM, Privacy Automation, AI Risk, and Data Lifecycle Management

► www.bigid.com/demo

► www.bigid.com/risk-assessment

► info@bigid.com



BigID Next

"The features they offer are the moat that they have built around the product. This is what makes them the market leader in Data Privacy and Protection."



IT Security & Risk Management Associate - Banking

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BigID Next

"Exceptionally powerful and easy to use tool that integrated smoothly into our environment and delivered value from day one. The BigID team is fabulous to work with."



Senior Vice President & Chief Data Officer - Banking

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