“Master Data Management (MDM) Implementations – Are we on the RIGHT Track?

DAMA Chicago Meeting
Daugherty Business Solutions
Oakbrook, Illinois

18th February, 2015

Mani Kumar Manda
Rhapsody Technologies, Inc.

Rhapsody
TECHNOLOGIES, INC.

Agenda

- Introduction
- About Rhapsody
- What is Master Data?
- Our Observations
- Best Practices
  - Prologue - Before Implementation
  - During Implementation
  - Epilogue - After Implementation
- Conclusion

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Introduction

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About Presenter - Mani

Mani Kumar Manda
Rhapsody Technologies, Inc.
Naperville, IL, USA

- President of Rhapsody Technologies,
- Frequent speaker of topics associated with Master Data Management (MDM), Data Quality (DQ) and Data Governance (DG)
- Founder and Chair for OAUG MDM SIG
  - http://mdmsig.oaug.org
- Member of OAUG Education Committee
- Board Member of APICS Fox-River Chapter
  - http://www.apics-foxriver.org
- Working with ERP, CRM and MDM applications for over 20 years for clients in many industries

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What we believe?

We believe in the pursuit of **Business Excellence** by laying a solid foundation of data management framework in alignment with Organizational Vison and Goals.

We believe in empowering Business by providing best Master/Reference data; data that is highly reliable, accurate and complete set.

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About Rhapsody – Who?

- Helping customers realize benefits of MDM/ERP/CRM applications since 1998
- A full Services Consulting firm with focus on Master Data Management Solutions
- Oracle's Preferred Partner
- High degree of Client Satisfaction
- Flexible and Adaptable to meet unique business challenges of Clients

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Our Service Offerings

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What is Master Data?

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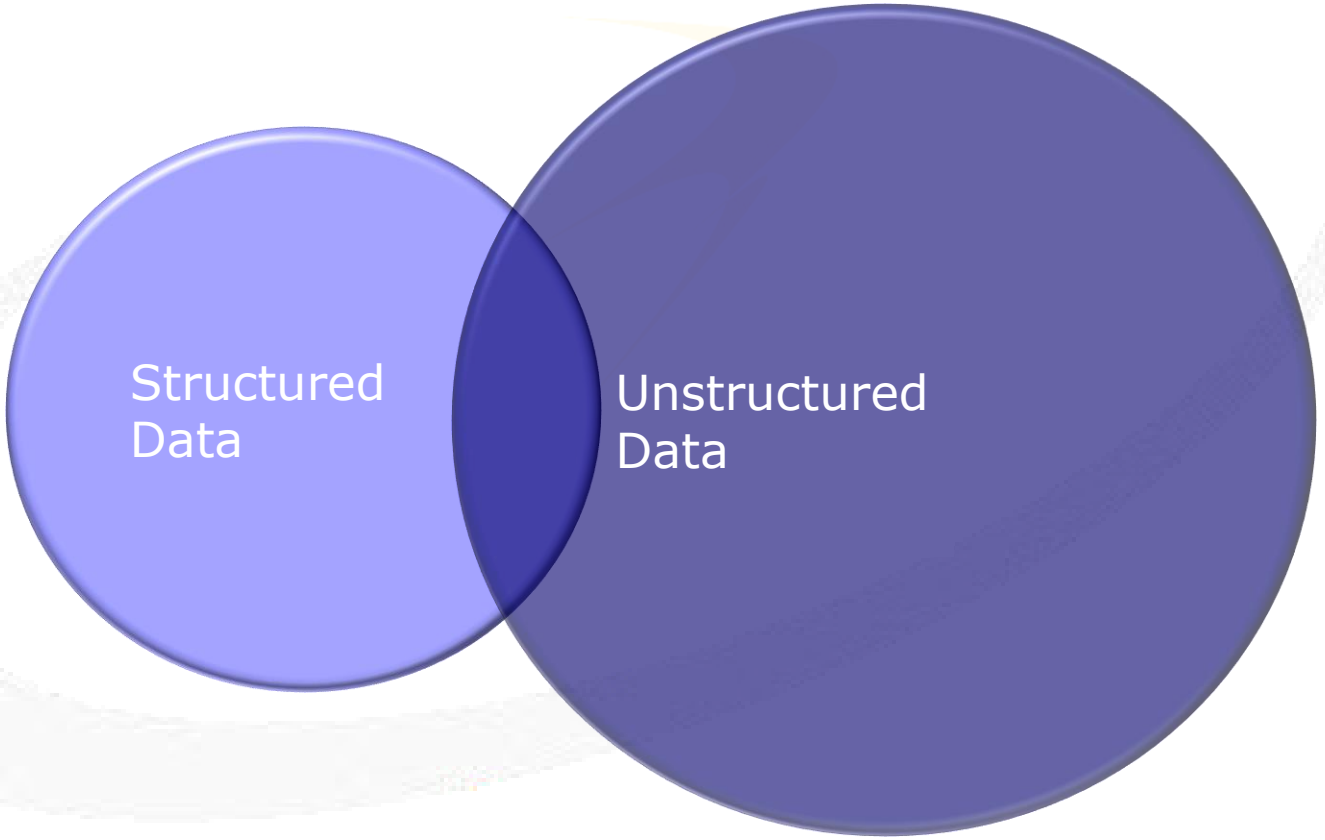
Data is …



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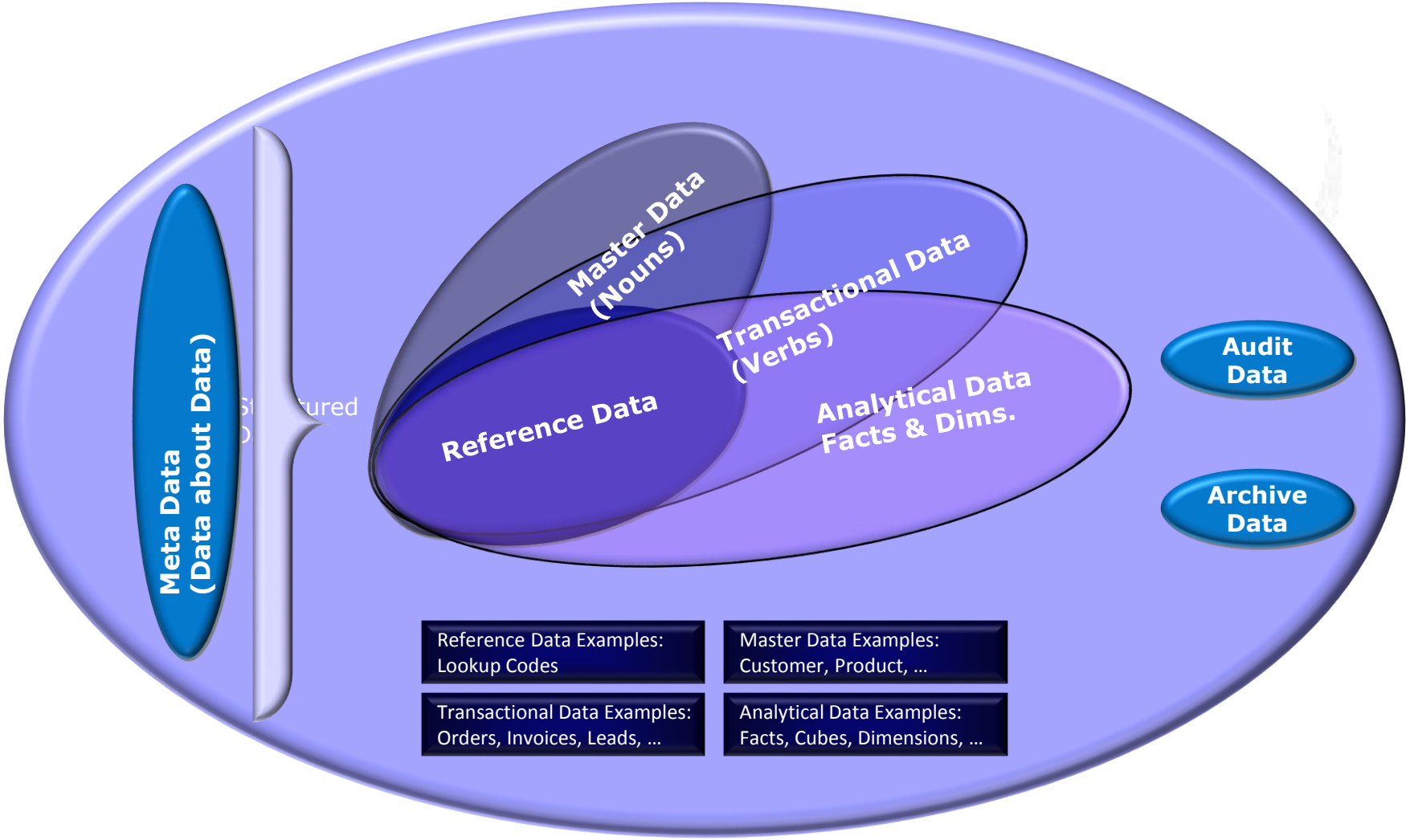
Structured Data "Hierarchy"



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What is
Master Data Management (MDM)?

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Per Rhapsody, MDM means

1. Increasing the operational excellence across the Enterprise.
2. About establishing the Single Source of Truth for Master Data, in other words a System of Record/or Reference that is reliable, available when needed and is always maintained.
3. About consolidating, de-duping, and cross-referencing the Master Data across heterogeneous systems to establish a Single View of the Master Data.
4. About providing 360^0 view of the Master data.
5. About establishing a Data Governance framework for welfare of the Master Data solution by establishing a governing Organization, Roles and Responsibilities as well as Policies and Procedures to steward the master data on an ongoing basis.
6. About facilitating the definition and maintenance of Analytics and Segmentation to drive growth in top line (Revenue) and bottom line (Profits) by increasing the effectiveness of various business processes
7. Accomplish all of the above with a synergistic alliance between Business and IT.

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MDM Categories & Domains (or Entities)

Parties	Things	Places	Concepts
•Customer •Supplier •Employee •Citizen •Partner •Bank	•Product •Part •SKU •Service •Asset	•Facility •Location •Geography	•Chart of Account •Contract* •License •Policy
•MDM for Customer •MDM for Supplier •Previously known as Customer Data Integration (CDI) •Vendors sell as Customer Hubs and Supplier Hubs	•MDM for Products •aka Product Information Management (PIM) •Vendors sell as Product Hubs	•Vendor sell as Site Hubs (Only Oracle has a pre-built application)	•No one has a purpose built MDM solution for these areas

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Short Video about Challenges of Master Data…

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What have we seen in the field?

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Survey Question

Who should be leading the MDM initiative?

A. Business
B. IT

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Our Observations

- Business Leadership/Involvement
- Integration Hubs

- RFP Expectations
- State of Data Governance

- MDM Strategy
- Siloe'd Implementations

- Number of Domains

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Survey Question

In case of conflict, what do you think will take precedence between day-to-day operational priorities vs. management of master data?

A. Operational Needs
B. Master data Needs

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Best Practices

Before Implementation

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Best Practices – Before Implementation

1. Making a Business Case
2. Stakeholders with Enforcement Authority
3. Obtain Executive (CXO) Sponsorship
4. Defining Strategy for MDM

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1. Making the Business Case

- Data Profiling
- Regulatory Landscape
- Analytical Use Cases
- Create Upside potential vs. avoid downside Risks

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Survey Question

How many systems of entry you have for the creation and management of Master Data (Use Customer or Product Data as a basis for this question or another master data domain for your business)?

A. 1
B. 2-5
C. 6-10
D. >10

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1. Business Case - Data Profiling

- Choose a strategically important application for the Master Data Domain of interest
- Conduct Data profiling of the master data in this application
- Use these metrics to identify the impact on the Organization
- Invest in a third party tool to facilitate the data profiling which will be used extensively before, during and after implementation of any MDM solution

According to Gartner, about $8.2 million are lost due to data quality issues on an average based on a survey of 140 companies.

59% of respondents don't know how poor data quality is impacting
22% of respondents estimated losses of over $20 Million
4% of respondents estimated losses of $100 Million or more

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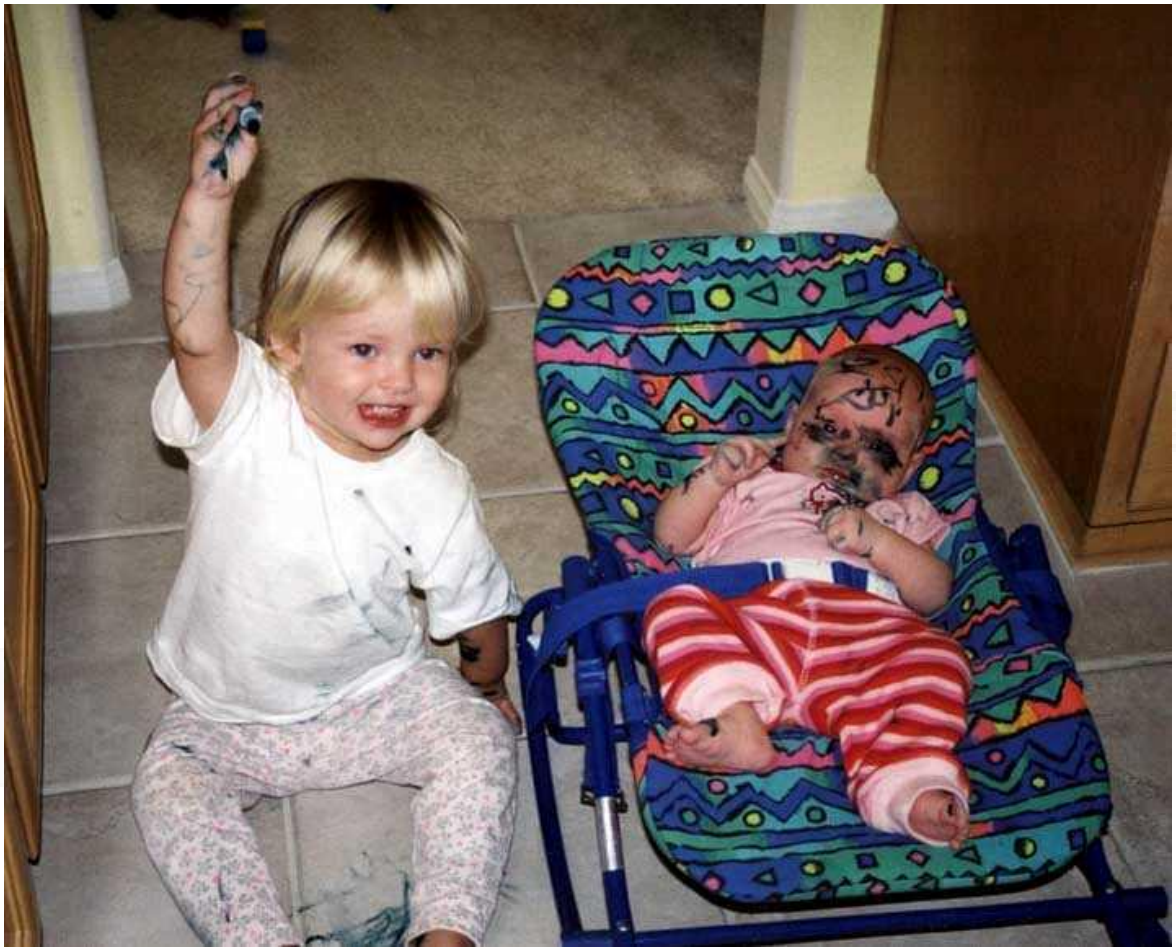
Before Profiling – The perception…..



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After Profiling - The shocking revelation …

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1. Business Case - Regulatory Landscape

- Identify the regulatory landscape that dictates the need to manage master data

- Look into
  - Privacy Laws - Customer
  - Child Labor Laws - Supplier
  - Environmental Laws – Site, Supplier and Product
  - OSHA Regulations - Site
  - Denied Party List (DPL) Mandate – Customer and Supplier

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1. Business Case – Regulatory Landscape - Data Privacy

- Data Privacy in a digital age is very important
  - Pertains to Personally Identifiable Information (PII)
  - Laws
    - US
      - Federal Laws
        - Privacy Act of 2005 – Attempts to strictly limit the display, purchase or sale of PII without the person's consent
        - Anti-Phishing Act of 2005 – To prevent the acquiring of PII through phishing.
        - HIPAA – Health Insurance Portability and Accountability Act – Patient Information
        - …
      - State Laws
        - California – OPPA – Online Privacy Protection Act of 2003
        - …

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1. Business Case – Regulatory Landscape - Compliance

- Fair Credit Reporting Act
  - Regulates the collection, dissemination and use of consumer credit information
- Gramm-Leach-Bliely Act
  - Requires all financial companies in US to put policies and procedures that govern the collection, disclosure and protection of consumers non-public personal information (PII)
- HIPAA
  - Requires all healthcare organizations to use National Provider Identifier (NPI) in claims submitted to CMS
- SOX
  - The Section 404 of Sarbanes-Oxley Act requires Organizations to take an active interest in the accuracy, consistency and timeliness of the data
- SEC
  - Requires public companies to report risk exposure for bottom-line and top line numbers

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1. Business Case - Analytical Use Cases

- It is important to take into consideration of requirements (in other words use cases) of Business Intelligence and Data warehousing applications, which are downstream applications to MDM application
- Could be as simple as data that is basis for Segmentation
- May Influence other analytical requirements

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1. Business Case – Upside Potential vs. Downside Risks

- Business Case must include
  - Use Case scenarios for Upside Potential of instituting and implementing an MDM program
    - Data Profiling will provide some scenarios
  - Use Case scenarios for Downside Risks of inaction
    - Study of Regulatory Landscape will provide scenarios

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2. Stakeholders with Enforcement Authority

- Establish Data Governance Council
- Data Governance Council must have stakeholders that have enforcement authority
  - Otherwise the good decisions that are made by the council get lost resulting in project failures
- You should include Departmental Heads, Business Unit Leaders, at least one of key CXO
  - Governance council is not the place for some one who does not have enforcement responsibilities.
  - Senior persons with correct background who want to take part or need to take part in MDM initiative that do not have enforcement responsibility can be part of Data Steward Team.

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3. Obtain Executive (CXO) Sponsorship

- To succeed you must have CXO (executive) support for all MDM initiatives
- Many programs and projects that do not have CXO support or lost support soon after launching the initiative have failed
- An increasing number of initiatives in MDM are facing challenges
  - (Reference—Gartner: The Top Seven Trends for Master Data Management in 1Q08)
- Not only Securing but ongoing support of Executives is very important for long term success
- Making a strong Business Case upfront and socializing it across the organization will help you not only to secure but to sustain the Executive Sponsorship

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Survey Question

How long do you think it will take to implement an MDM solution for one master data domain at an Enterprise level – Customer or Product data for example?

A. 3 Months
B. 3-6 Months
C. 7-12 Months
D. 1-3 Years
E. > 3 Years

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4. Strategy for Master Data Management

- Vision
- Define Business Objectives
- Establish Priorities
  - Align with
    - Executive Priorities
    - Business Initiatives
    - Technology Roadmap
    - Analytics Roadmap
    - Information Management Strategy
    - Security
- End Goal
- Steps to reach

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“he who does not lay
his foundation beforehand,
may by dint of great ability
lay them afterwards,
yet it must be
with the most extreme labour
on the part of the architect and
with the greatest danger
to the building”

taken from
“The Portfolio” - Vol. 7 (1819)

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Before Implementation

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Best Practices

During Implementation

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Best Practices – During Implementation

1. Launch Data Governance Initiative

2. Implementation Methodology

3. Analysis
   - Detailed Requirements
   - Semantic Business Model
   - Conceptual Data Model
   - Data Security
   - Data Profiling

4. Data Cleansing
   - Data Standardization
   - Validate Addresses

5. Design
   - Implementation Approach
   - Data Quality Metrics
   - Design Considerations
   - Canonical Designs
   - Classifications
   - Robust Search UI
   - Go beyond Identity Data in Stages

6. Conversion
   - Enrich Data

7. Training

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Survey Question

When did the Data Governance program start at your Organization?

A. Before MDM
B. At the same time
C. After MDM
D. Not Started

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1. Implementation - Launch Data Governance Program

- Establishing Data Governance is all about establishing the framework for the “decision rights” and “accountability” for the welfare of the data
- Data Governance initiative is a must for any MDM project(s)
- You must establish the Data Governance Program at the beginning of the project
- Data Governance program should be designed at the Enterprise level addressing multiple domains of MDM, not just for Customer or Product
- Both Business and IT must come together
- Base framework established by the time Analysis phase is done, but no later than early design phase

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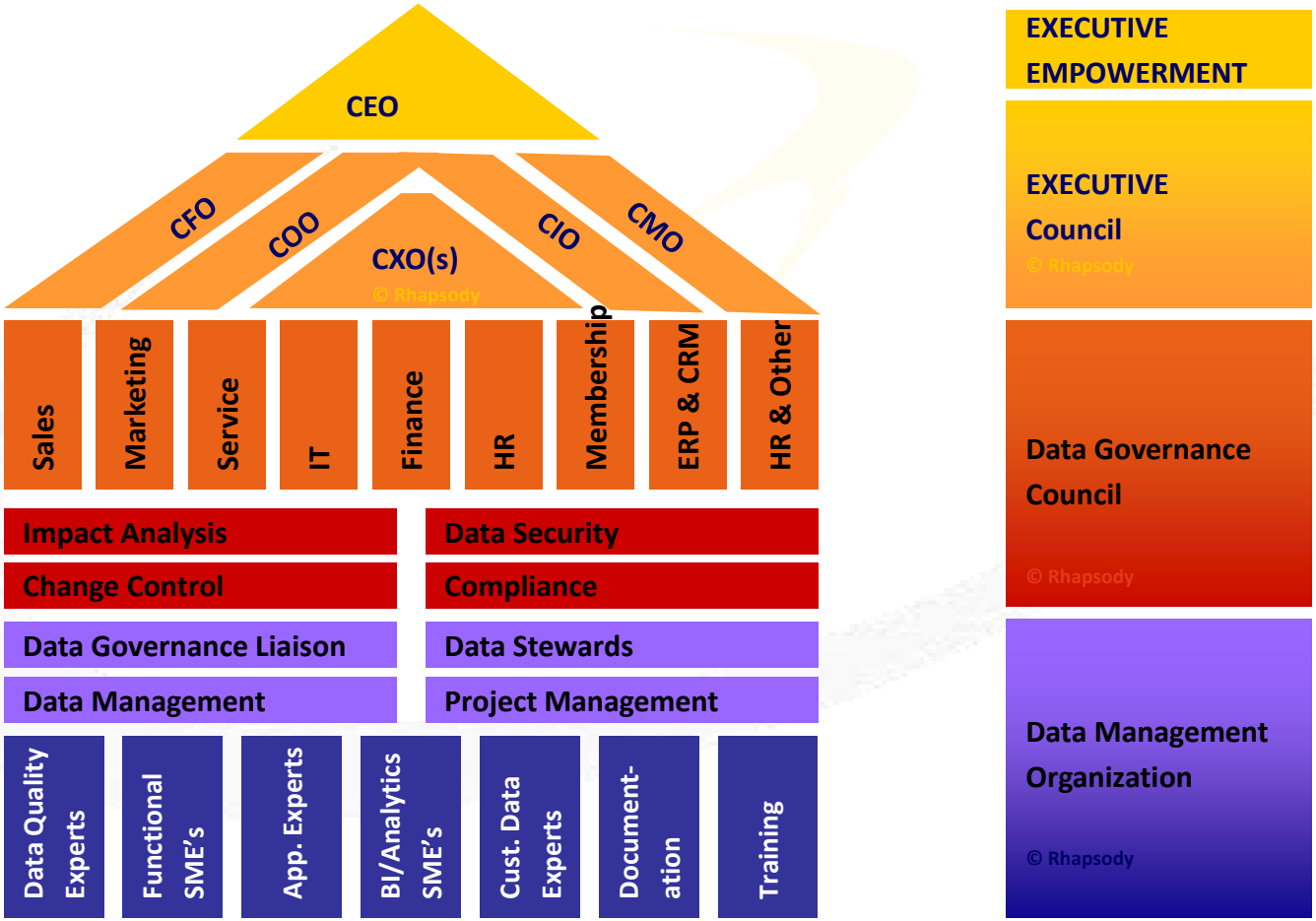
Data Governance and Data Management Framework and Structure



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2. Implementation - Hybrid Project Implementation Methodology

- Many MDM projects often take years to complete to obtain the vision of 360^0 view at an Enterprise level, if at all one reaches that destination
- Risk of losing executive and/or user support
- Approach the project with global design but phased implementation
- Mature the MDM initiative in an incremental manner

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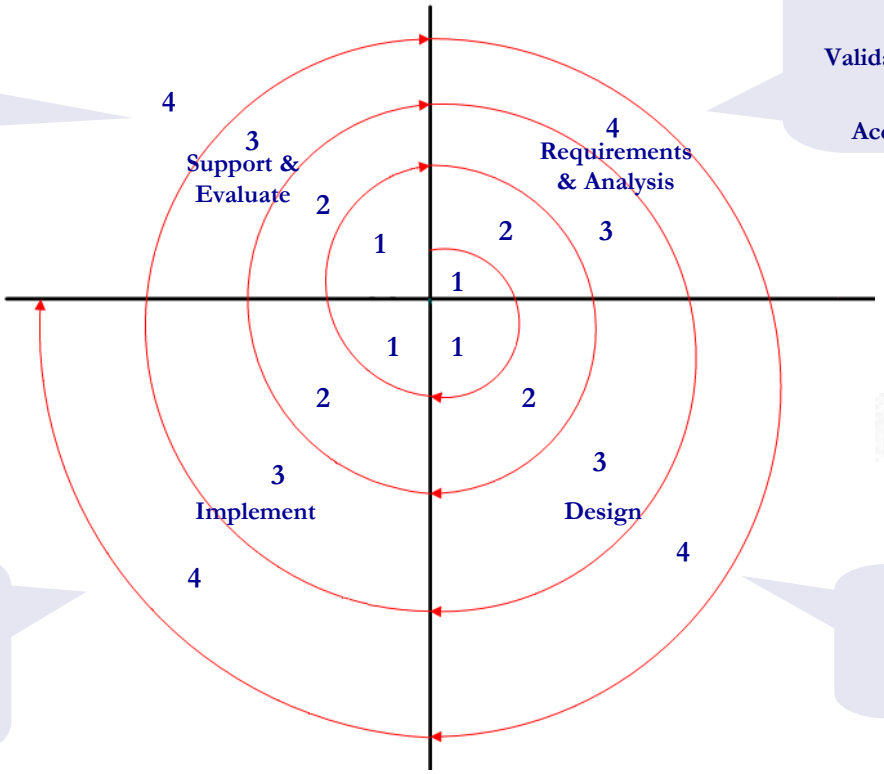
Project Implementation Approach – Spiral Methodology



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3. Implementation - Analysis - Semantic Business Model

- A semantic business model is a knowledge base developed with concepts and the relationships between these concepts based on how business is conducted
  - This should be done at an early stage of the MDM project. For Customer/Supplier domains, this model can be called “Trading Community Model (TCM)” or “Semantic Customer/Supplier Model”
  - The Semantic Models are not based on any application rather they are about business
  - The Semantic Model will facilitate the decision of what people, entities and relationships to host in MDM for Customer Instance
  - Surprise Factor

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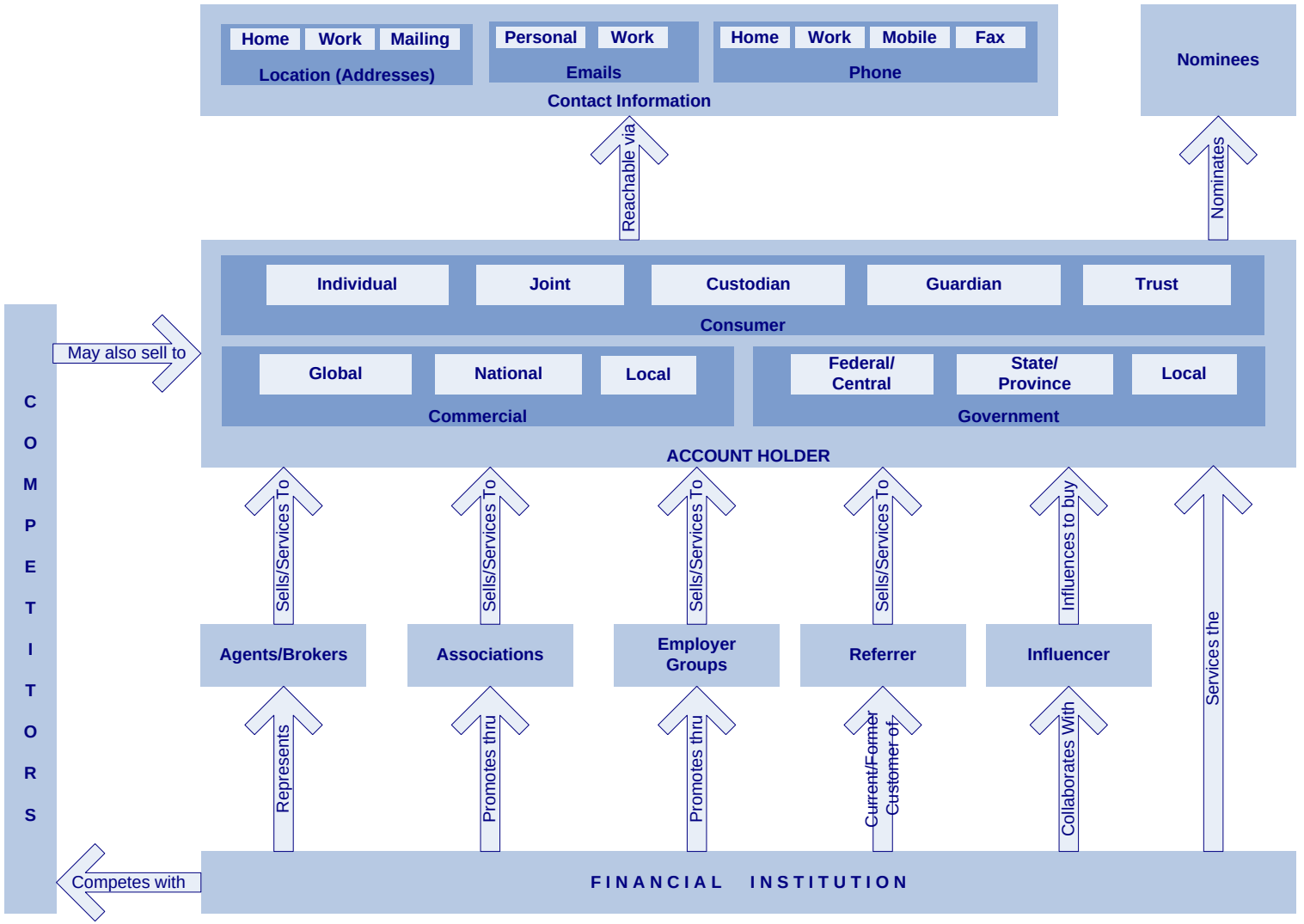
A sample trading community of a Financial Institution



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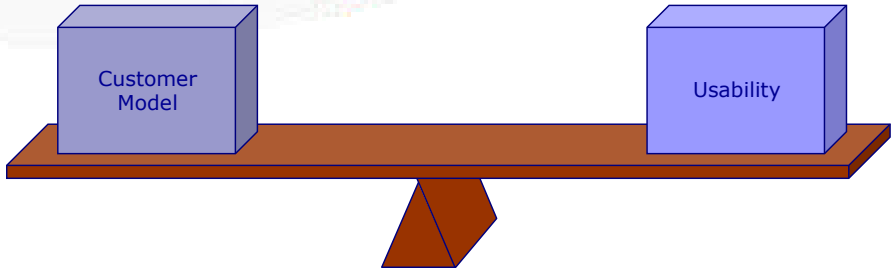
3. Implementation – Analysis - Conceptual Data Model

- The flexible functionality of an MDM solutions leads into the ability to create same set of data in multiple ways
- For example in Oracle Customer Data Hub (CDH), the TCA framework allows you to create customer data in many ways
  - If you take a customer with 3 locations
    - Option#1 – Site Centric Model – Create One party with 3 locations
    - Option#2 – Party Centric Model – Create Three parties with each party having one location and relate these parties to form a (corporate) hierarchy
    - Option#3 – Some where between Option #1 and Option #2



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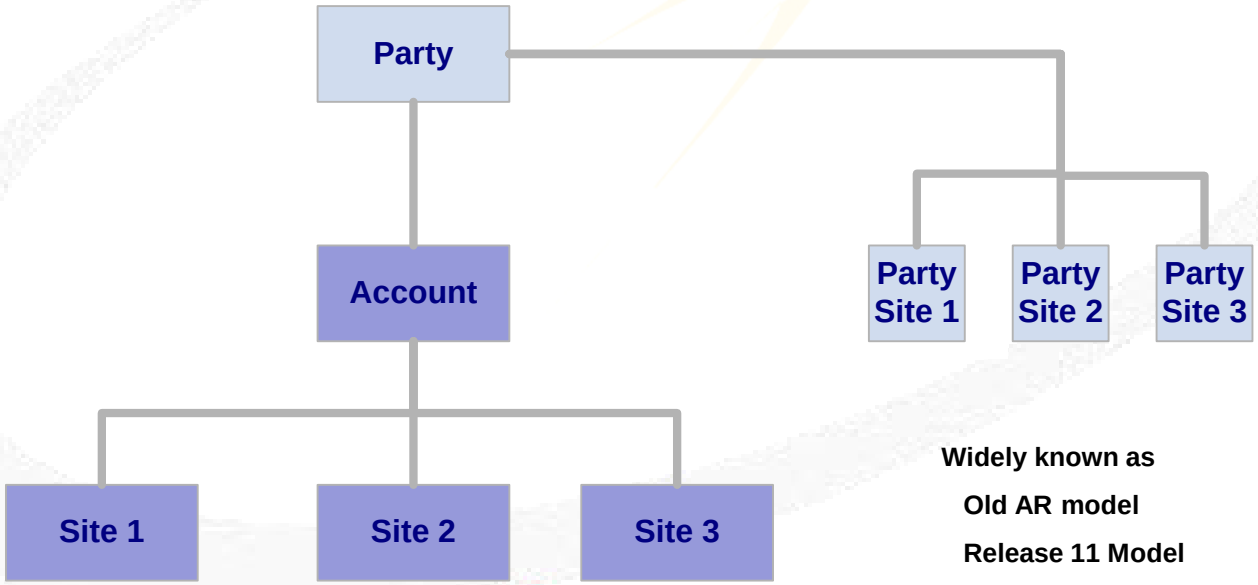
Option #1 - Site Centric Model



Widely known as

Old AR model

Release 11 Model

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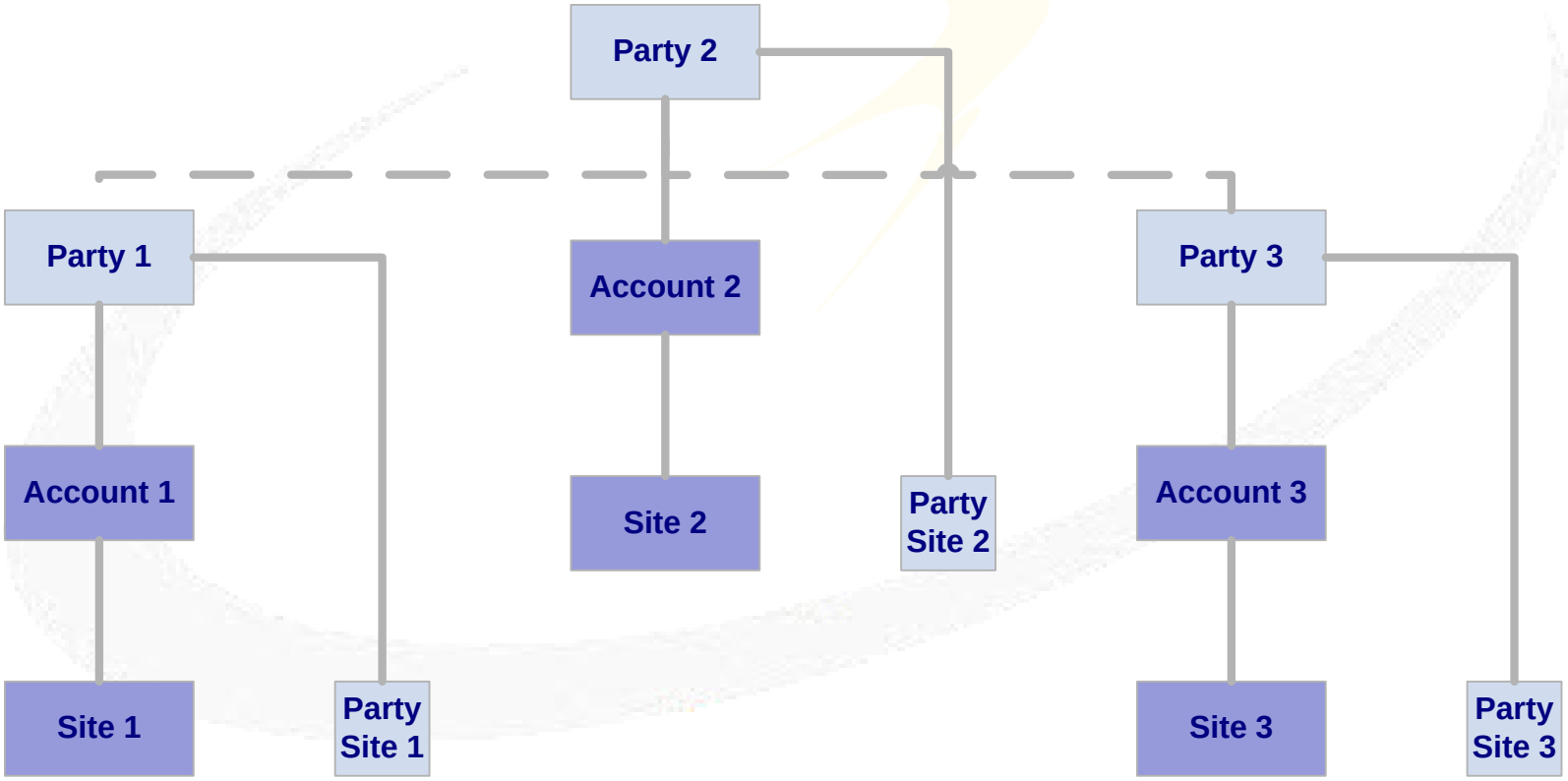
Option #2 - Party Centric Model



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Survey Question

How well you think the requirements for an MDM implementation were identified (Rate this question on 1 to 5 scale 1 being the best and 5 being the least)?

A. 1
B. 2
C. 3
D. 4
E. 5

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3. Implementation – Analysis – Detailed Requirements

- Requirements should be
  - Detailed
  - Comprehensive
  - Complete
- Requirements gathering takes time

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3. Implementation – Analysis - Data Security

- Data security is important for a global MDM solution
- Carefully evaluate users in terms of their access requirements
- Utilize built in security functions of the tool
  - For example Data Sharing and Security (DSS) functionality in Oracle CDH
  - Role based security in PDH, SDH, Site Hub, etc.
- Make sure to identify all regulatory requirements for data Security
  - Doing otherwise will lead the firm into regulatory nightmare
  - Recent Examples
    - Lost data
      - Anthem was recently hacked and lost critical customer data for 80 Million Customers that includes SSN, DOB, ID Card, Employment Information, etc.
      - BNY Mellon Shareowner Services lost Tapes containing SSN data
    - Hacks
      - Target hack
      - Sony PlayStation Network Hack costs $170 Million
      - TJ Maxx (TJX) pegs data breach tab at $118 Million

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3. Implementation – Analysis - Data Profiling

- Conduct comprehensive data profiling in each of the source systems, an extension of the profiling done during business case
- Data Profiling is a must do task
  - Done prior to Conversion usually during early stages of Analysis
  - Done periodically after go-live to monitor the state of data quality
- Data Profiling helps in identifying
  - The good data that can be brought over to an MDM Application
  - Bad data that can be ignored or fixed prior to conversion
  - Attributes that can be Standardized
  - Identify the data that is misrepresented
- Invest in a third party tool to facilitate the data profiling
  - Oracle Enterprise Data Quality (OEDQ)
  - Trillium (a unit of Harte-Hanks)
  - Talend (Open Source)

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4. Implementation – Data Cleansing - Data Standardization

- It is important to standardize the data using data quality tools for better data quality
  - Use third party tools for data standardization for Customer and Supplier Data
  - Use Oracle PDQ Server to standardize Product descriptions
  - Or build custom routines to standardize the data prior to or as part of conversion
- Not all tools can help you standardize
  - For example, Oracle CDH can not standardize the data
  - Many of the MDM tools can not standardize the data
  - But can standardize the data for purposes of identifying duplicates only

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4. Implementation – Data Cleansing - Validate Addresses

- It is critical to validate and standardize the address data to facilitate better duplicate identification
- Use the Vendor whose solution is pre-integrated with the tool
  - For example
    - Trillium and First Logic for CDH
    - Many vendor solutions for UCM through hooks

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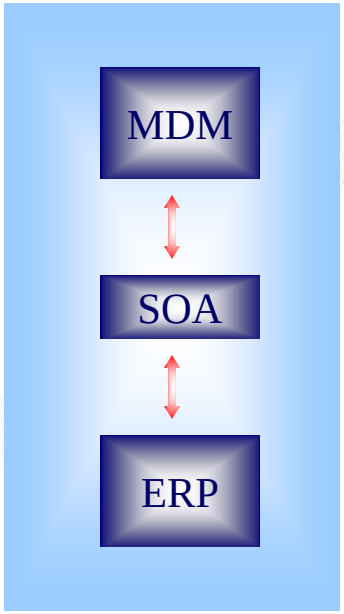
5. Implementation – Design - Implementation Approach

- Depending on vendor solution your choice this option may or may not exist

- MDM – Stand Alone environment
  - Decisions can be made independent of operational system
  - Can apply patches when needed
  - Implementation cycle not dependant upon operational application
  - Easier tackling of multi-domain Use cases



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5. Implementation – Design - Implementation Approach

- MDM – Operational ERP environment for example (such as eBusiness Suite-EBS)
  - Reduced Licensing Costs
  - Inability to apply patches when needed
  - Implementation cycle is influenced by operational needs of other modules
  - Modeling impact

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5. Implementation – Design - Data Quality Metrics

- No MDM initiative will be fully successful, unless
  - Data Quality objectives are set upfront
  - The quality of the initial data is measured
  - The data can be monitored over a period of time to identify the change in data quality

- The project must include the time and resources for defining Data Quality Metrics, Procedures that facilitate the tracking of Data Quality Metrics and reporting of improvement in data quality

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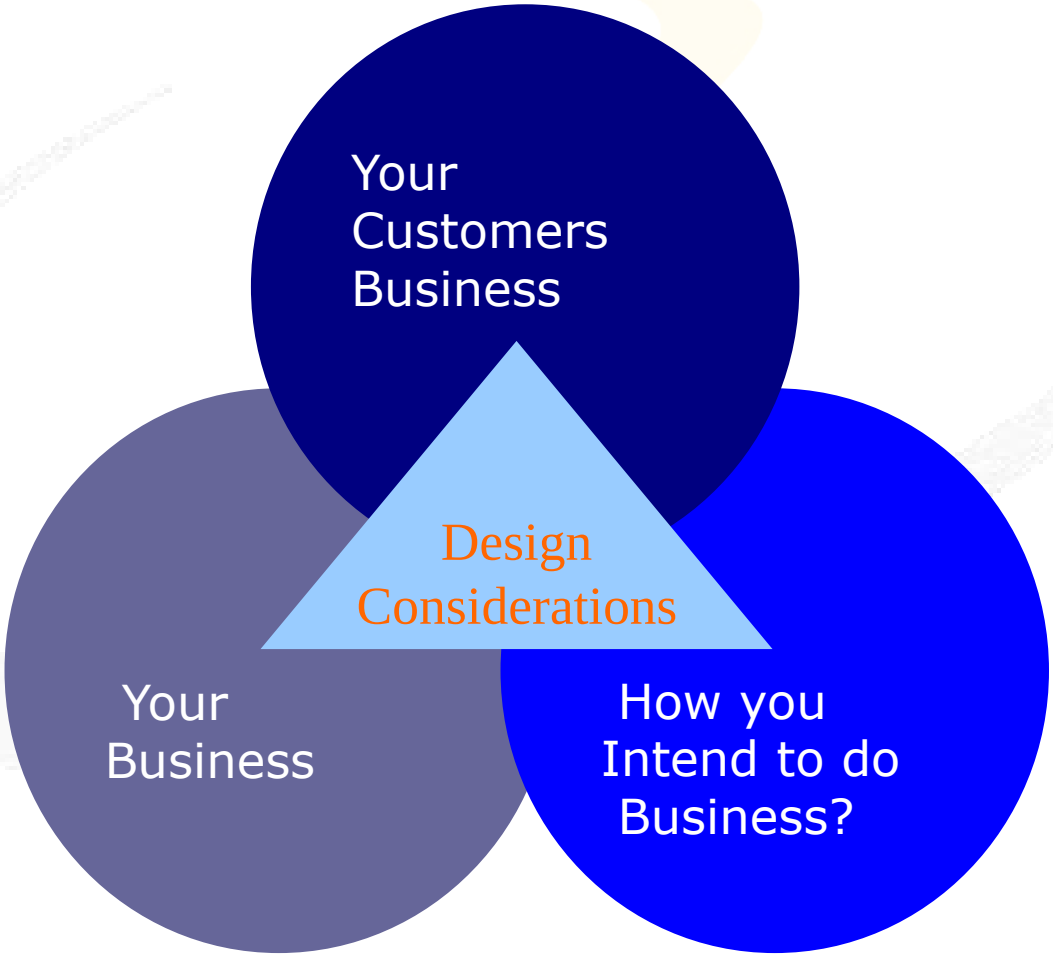
5. Implementation – Design - Design Considerations

Example: Customer domain



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5. Implementation – Design – Canonical Designs

- Adopt an open standard based Canonical Mapping for integrating data between Source Applications, MDM Hubs and and Target Applications
  - Open Applications Group (http://www.openapplications.org)
- The Canonical format should be accommodating needs at enterprise level, not at departmental or a specific application level
  - Global Design with Phased Implementation
- If needed, start with a standards based canonical model and customize it further

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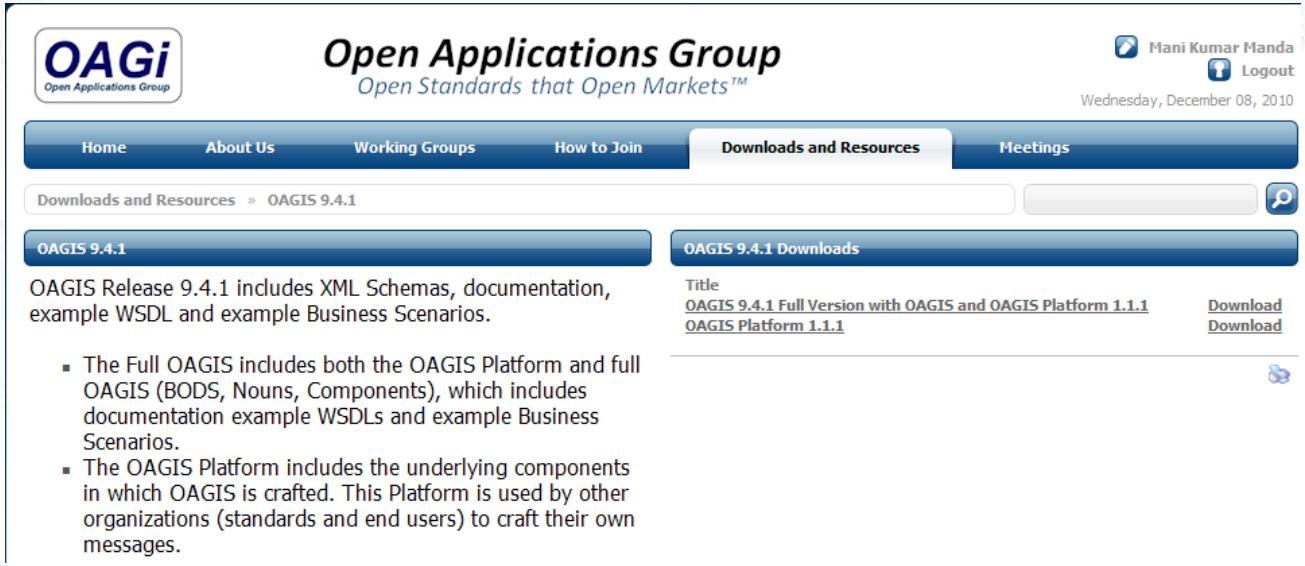
5. Implementation – Design – Canonical Designs

- Some products support open standards
  - Oracle's MDM Hubs with their Application Integration Architecture (AIA) framework and Process Integration Packs (PIP) leverages OAGIS standards



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5. Implementation – Design - Classify, Classify, Classify !!!

- It is important to identify all classification requirements of all consuming applications
- Classify data as many ways as important to the business
- Classify at an appropriate level
  - Party Level classification is not suitable for Account level entities
  - Product Category Classifications vs. Product Catalog Classifications
- Classification will facilitate the better intelligence of numbers such as Sales, Receivables, etc.

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5. Implementation – Design – Robust Search UI

- Should be able to query based on all key attributes
- Common perception is to provide key identity attributes
- You should also provide the ability to search based on Source System References
- Ability to filter the result set by source systems
- Role based Search Parameters

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5. Implementation – Design - Go beyond Identity Data – In Stages

- Identity data is a must to achieve the single view of the Master Data
  - Even then – Bring one source at a time into MDM
- Data for which an MDM solution for Customer is suitable is
  - Industry specific information
    - Healthcare
      - Hospital information such as specialties, number of beds, physicians, …
  - Segmentation
  - Classifications
- Make sure that the MDM instance matures over a period of time in multiple phases

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6. Implementation – Conversion - Enrich Data

- When to do enrichment?
  - During conversion; or
  - Post Conversion
- Data enrichment is often necessary step for many businesses
  - D&B data to build corporate hierarchies in case of Customer Domain
- Industry specific content providers
  - Healthcare
    - Verispan
    - Solucient
    - Sherlock
- Multiple providers may be needed some times

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7. Training

- Start Early
- Identify and Pair key Business Users with Implementation Team Members
- Train Early in the chosen tools
- Train often in the implemented processes

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During Implementation

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Best Practices

Epilogue

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Best Practices – Epilogue

1. Certify Data
2. Latest Versions
3. Socialize Results
4. Ensure Continued Executive Sponsorship

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1. Epilogue - Certify Data

- Provide a means to identify the data that has been reviewed and validated
- Search results should show the certification status of the data
- Various capabilities in tools
  - CDH allows to mark the data with custom defined certification levels and reasons
  - Not all tools for all data domains have this capability

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2. Epilogue - Latest Versions

- The overall MDM is still maturing resulting in change in approaches and functionalities in a product
- The products in this space are rapidly increasing their functionality as well as fixing bugs
- Must upgrade to a latest Version
  - Latest versions provide new capabilities
- Must also apply all latest patches
  - High number of Bugs requiring frequent patch application
  - Spend time upfront in identifying patches in the functionality that you plan to utilize

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3. Epilogue – Socialize Results

- Publicize the success of the MDM implementation
- Promote the operationalization of MDM capabilities in operational and analytical applications
- The more an MDM application is tapped the more important it becomes to the organization

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3. Epilogue – Ensure Continued Executive Sponsorship

- It is important to validate and publicize the ROI after implementing an MDM solution
  - Ensure to publicize the increase in upside potential due to an MDM application as well as the mitigation of downside risks again due to an MDM application
- Promote usage of MDM application to benefit more parts of the organization in turn to secure continued executive support
- Extend MDM initiatives to new data domains

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Conclusion

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To Conclude

- The impact of MDM projects will be felt across the Enterprise and should be treated as an Enterprise level initiative
- MDM initiatives takes long time to get buy-in as well as implement. Don't expect to rollout an MDM solution quickly
- Learn from the experience of others and plan accordingly
- Fixing data quality challenges is time consuming and often times feels like a daunting task. Make sure to set expectations accordingly.
  - A Data Quality initiative preceding an MDM initiative will make MDM initiative run smoothly

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To Conclude

- Don’t underestimate the political currents and roadblocks that gets thrown frequently
- Do not buy MDM products first without getting into deeper analysis of pain points and requirements
- Most importantly architect an MDM solution for multiple MDM domains, even if the initial implementation is for a specific domain

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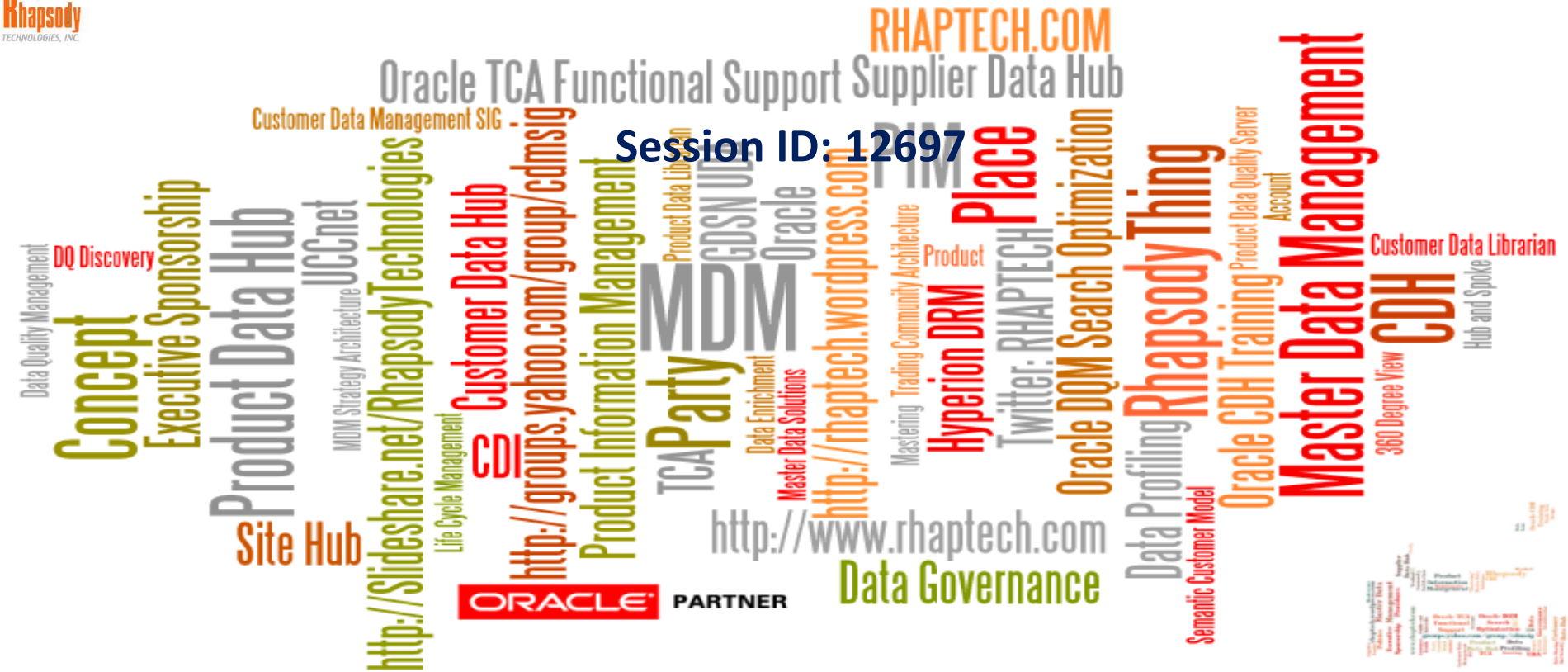

THANK YOU

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