Product Evaluation Criteria & Field Reports for the
Leading MDM & MDG Solutions

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“Top 10” MDM Evaluation Criteria

1. Data model
2. Business services
3. Identity resolution
4. Data governance
5. Architecture
6. Data management
7. Infrastructure
8. Analytics
9. Developer productivity
10. Vendor integrity

Infrastructure fracas will escalate as mega app vendors rush to dominate business services/processes & data models as high ground

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MDM Institute Field Reports - MDM**

- DataFlux
- Heiler
- IBM MDM Server
- Informatica MDM
- IBI MD Center
- Kalido MDM
- Microsoft MDS
- Oracle MDM
- Orchestra Networks
- Pitney Bowes
- Riversand
- SAP MDM & MDG
- Software AG
- Stibo
- Talend
- Teradata MDM
- TIBCO MDM
- Visionware

** Persisted customer or product data hubs
Field Report: DataFlux qMDM v3.0

Strengths

- Graduated approach to MDM – DQ->DG->MDM
- Quick time-to-value – no per-record or per-domain charges
- Integrated DQ (incl entity resolution) + quality knowledge DBs
- Flexible data model – domain-neutral & multi-entity-based
- Commitment to active data governance & related work flow
- SAS “deep pockets”, common data mgmt, channel & stability
- Midmarket CDI references

Caveats

- Modest # of MDM references – DSM, NMBS/Belgian Railways, PPL, The Travel Group, …
- Modest support & references for product master data
- Relatively small # of customers adding product master to customer master
- No references for registry or high-volume transactional MDM implementations
- Lack of SI channels
- Nascent BPM/workflow for “policy hubs”

1 – Accident Compensation Corporation, Actelion, BSN Medical, Carl Zeiss, CPP, Edwards Life Sciences, Hyundai, Invacare, Northern Virginia Electric Cooperative, West Midlands Police.
Field Report:
Heiler Software Product Manager

**Strengths**

- Focus on multi-commerce MDM – multi-channel + int’l multi-shop
- Expertise in aftermarket/MRO, CPG & life sciences
- Rich workflow-oriented UI with flexible data model – e.g., built-in data governance & dashboards
- “PIM 360” – a.k.a. Prometheus methodology
- App Suites – Catalog Mgr, **Digital Media Mgr**, Print Mgr, Business Catalog, **Supplier Portal**
- Scalability & complexity
- International focus
- Momentum

**Caveats**

- Focus on PIM – missing CDI, just adding B2B supplier
- Lack of inheritance/OO fundamentals in data model
- Nascent SI channel strategy – Logica & Sapient best partners

1 – High SKU count (25,000 products or more); complex products (250+ data elements, multi-level product / SKU);
2 – Multi-lingual; distributed data governance
3 – Baumark Direkt, General Motors, Harman, Otto, Мир Книги, Music Group, Puma, Saks Fifth Avenue, Sartorius Werkzeuge, Tommy Hilfiger, Universal Music, …
Field Report: IBM InfoSphere MDM

Strengths

- Comprehensive – Integration of 3 best-of-breed technologies – MDM Server, Initiate MDS, MDM4PIM
- Collaborative authoring – workflows for collaborative tasks
- Strong solution for R/T processing with business services, MDM Application Toolkit & BPM Express
- Real-time probabilistic search/match accuracy, scalability & performance
- Strong emerging offerings in areas of Data Governance & RDM
- Market share leader – strong in Fin Svcs, Public Sector, Healthcare & Retail

Caveats

- Integration of MDM technologies still in early stages
- Industry/use case-specific solutions just emerging (outside of traditional strengths of HC/FSI)
- Integration with other IBM products still emerging

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Field Report: Informatica MDM 9.5

**Strengths**

- Extensible multi-entity/domain support
- Data governance console (IDD)
- Multiple deployment – on-premise, cloud, hybrid
- Multiple implementation architectures/use cases – e.g., registry/transactional/coexistence
- 4th gen features: integrated BPM (Fujitsu), cloud integration, ...
- Strong integration with: data integration, identity resolution (IIR), metadata & DQ
- Partnerships with ACN, CAP, CTSI, CSC, EMC, IBM GBS, TCS & WIT

**Caveats**

- Nascent active data governance
- Nascent reference data strategy
- Scalability concerns
- Registry-to-Hub migration

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1 - Products/Customers; B2B/B2C/B2B2C; Employee/Contractor/Clinical Protocol/Product
2 - Informatica Data Director (IDD) is data steward console application for entity lifecycle management
3 - 2012 momentum = 20th Century Fox, Aviva USA, BMC Software, Devon Energy, Global Hyatt, IP Australia, Logitech, Outback, Polycom, Printemps, ...
Field Report: IBI Master Data Center (MD Center)

**Strengths**

- Proven multi-entity MDM product – via OEMing of Ataccama with add’t’l upgraded deterministic matching & DQ Center
- Real-time data integration\(^1\) – including process-level integration with Oracle & SAP
- Integrated with iWay application & data adapters\(^2\)
- Integrated, separately marketed data profiling via DQ Center
- New name customer momentum resulting from MDM as integral component of 2012 go-to-market BI strategy\(^3\)

**Caveats**

- Under invested in marketing
- Nascent data governance vision & roadmap
- No reference data strategy
- No BPM strategy
- Lack of industry data models – data model agnostic mostly, just starting with healthcare data model
- SI channel ramping up
- Modest # of references

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2 - iWay Data Migrator iWay Service Mgr, iWay Search
3 - CNWL NHS, Ministry of Transportation (Ontario), Mt. Sinai Hospital, SABRE Marketing, …
Field Report: Kalido MDM 9.0

**Strengths**
- Time-to-value/ROI
- Focus on active data governance via data policy mgmt
- Multi-entity
- Reference data support
- Visual business modeler
- Process flows & workflow engine for data governance/stewardship
- Model-driven user-specific customized interfaces w/no coding
- European momentum

**Caveats**
- Data governance needs better integration (round-trip)
- Lack of awareness for Kalido’s operational use cases
- Lacks native customer/address standardization
- Lack of strong major SI channel

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1 - Customer, product, financial, supplier, employee, location, KPI, etc.
2 - Recent European momentum in CPG, pharma, financial services, insurance, as well as established successes in Virgin Media, Visa Int'l, Imperial Tobacco, Post Office Limited, AB InBev, etc

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Field Report: Microsoft Master Data Services

**Strengths**

- Hierarchy management
- Customer, product, financial, supplier, employee, KPI, etc.
- Pending RDM capabilities 2H2012
- Integration with SharePoint & MS Office
- (Eventual) integration with MS Data Quality Services (MS DQS)
- Support for PSFT, SAP BW, R/3 hierarchy import
- Low cost of ownership / SQL Server 2008 bundling

**Caveats**

- No data governance roadmap
- No roadmap for integration with dynamic ERP & CRM
- Lacks identity resolution
- Not enterprise scalable
- Lack of strong SI channel
- Under invested in marketing

**Formerly Stratature +EDM (Enterprise Dimension Management)**
Field Report: Oracle Customer Data Hub v12.1.1

**Strengths**

- Multi-entity platform\(^1\)
- Trading Community Architecture
- Mid-market references\(^2\)
- High-tech manufacturing expertise
- Global ID generation, mgmt & x-ref
- Integrated DQ & Analytics
- Global reach\(^3\)

**Caveats**

- Minimal high-end references
- Fair-to-meek customer recognition capability
- Best fit is B2B & mid-market
- Lack of industry-specific data models

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1 - Parties, Products (PIM Hub), Locations (Site Hub)
2 - Agrokor, Church Pension Group, Etat de Geneve, GGB, Hanjin Shipping, Kangwon Land, LG Telecom, Network Appliance, Rand Merchant Bank, Symantec,, …
3 - Security blanket for government, high tech, & manufacturing industries
Field Report: Oracle Hyperion DRM ¹,² 11.1.2.x

Strengths

- Analytical MDM for sharing dimensions, hierarchies, & reporting
- Operational MDM (Ledger Hub) for chart of accounts, cost centers, legal entities
- Robust business rules engine (BPM)
- Active data governance - i.e., change request/approval workflows, role-based access, granular security, model-driven
- Integration with Oracle ERP/GLs, Hyperion EPM apps & others
- Strength in both financials & Financial Services industry
- Mature product, strategic technology
- Sold by HYSL & Oracle MDM sales force overlays

Caveats

- Lack of CDI references
- Minimal marketing of the solution

¹ - Formerly Hyperion MDM
² - DRM = data relationship management
³ - Potential to provide hierarchical unification across CDH & UCM (as well as IBM, SAP, & others); frequent use as master reference data system
Field Report: Oracle Customer Hub

**Strengths**

- Strong enterprise MDM & DG vision & roadmap
- Enterprise-strength vertical Hub applications
- OOTB integration w/ both Oracle & non-Oracle apps
- Momentum & expertise in Telco & Retail Banking
- High-end production sites
- Integrated DQ & identity resolution (Datanomics) & analytics
- Strong SI channel

**Caveats**

- Active data governance strategy emerging – Oracle Data Governance Manager = DQ workflows
- Delay of Fusion MDM
- Registry strategy still evolving

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1 - Formerly Siebel Universal Customer Master 8.2 a.k.a. “UCM”

2 – Areva T&D, Bank of Riyadh, CSFB, Home Depot, KPN, Nokia, Qwest, Royal Caribbean Cruise Lines, Saudi Telecom, Toyota Financial Services, Westpac, Zebra Technologies, …
Field Report: Oracle Healthcare Master Person Index

**Strengths**
- Open source (Mural, J CAPS)
- SeeBeyond heritage
- Primarily supporting registry-style approach
- High scalability – albeit via toolkit approach
- Party data – customer, supplier, & citizen
- 100+ installations of SeeBeyond $^2$
- 10+ of MDM Suite

**Caveats**
- Open source
- Under invested in marketing
- Perceived as “healthcare-& government-centric”
- Staff reductions

1 – Formerly Sun Microsystems MDM Suite R6
2 – Geisinger Health Systems, Harrods, Harrow Council, Infonet, Los Angeles Department of Water & Power, Providence Health System, National Health Svc (UK)
Field Report: Orchestra Networks EBX 5

**Strengths**

- Integrated pro-active data governance – data models, DQ rules, workflow config, role-based security, ...
- Native support for party & product + reference master
- Strong multi-entity support via semantic modeling & OO layer (vs. relational orientation of others)
- 100% web-based UIs for business & IT
- 3-way versioning – “what if?”, “as of?”, “who did what?”
- Standards-based, not 3rd party – Java, any RDBMS, any ETL
- Cloud/SaaS offering, MDM Alliance

**Caveats**

- Modest marketing budget
- Lack of SI channel
- Lack of momentum outside France
- Matching – new in EBX 5
- Only modest references for high-end scalability

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1 – BNP Paribas; Bolloré Africa Logistics; Credit Agricole; Geodis; La Poste; L'Oréal; Michelin; National Bank of Canada; netSpend; Oseo; Technip; UBI Soft; United Technologies Corp; VUB Banka …

2 – BNP Paribas, Geodis
Field Report: Pitney Bowes Master Data Hub

**Strengths**

- Short time-to-value
- Entry-level with scalability
- Graph-DB foundation enables
  - Complex hierarchy analysis of big data & social media-integration
  - Location context support
  - Visual analytics
- Built-in social network analysis
  - Built-in social network analysis
  - Proactively understand influential entities within network to enhance 360° customer view
- Built-in Data Governance framework

**Caveats**

- New to market
- Modest marketing budget
- More Social MDM than classic MDM
- Lack of SI channel
Field Report: Riversand PLM 6.1, MDM, & Plant MDM

**Strengths**
- Built-in data quality & data governance
- Multi-entity MDM focus – product, supplier, material, location, …
- Singular, modular, highly-integrated solution = better process orchestration
- Deep comprehensive PLM functionality – well-integrated, search, digital asset mgmt, workflow, print publishing
- Deterministic matching
- Quantity of PLM references¹
- Retail, Petrochemical & Mfg expertise
- Hosted model available

**Caveats**
- Nascent operational MDM for ‘customer/party’
  - Lags other vendors in deployments
- Underinvested in marketing
- Current focus in NA but expanding to EU (2012) & AP (India office 2011)
- Ongoing channel conflict (minimal implementation partners)
- New DQ partners as channel – CNET, D&B, Experian, LaCross, Loquate, Trillium


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Field Report:
SAP NetWeaver MDM v7.1

**Strengths**
- Analytical MDM reporting for customer/party
- Operational MDM for supplier & product
- Quantity of MDM references¹
- Supply chain expertise
- Multi-entity MDM focus² & consistent product strategy
- Integration with BOBJ data quality & integration (ETL)
- SAP underpinnings for sys mgmt

**Caveats**
- Operational MDM for ‘customer/party’ not field proven
  - Did not support “full data” model until 7.1³
- Confusion/concern over long term roadmap/viability
  - SAP NW MDM = enterprise MDM for heterogeneous environments
  - SAP MDG – “embedded” w/ SAP solutions, starting w/ BOBJ; domain-specific MDM apps
  - SAP MDF/MDS (master data svcs) – HANA-enabled MDM for real-time CDI
- Registry strategy still maturing

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¹ CDI-related = Adidas, Intel, Nortel, Whirlpool, ... 800+ sites for PIM
² Including full product information management (PIM) capability & support for material, vendor, etc.
³ Very conservative ramp up; Previously lacking due to party model limitations

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Field Report: Software AG webMethods OneData v8.2

Strengths

- Fully integrated multi domain
- Multiple architectural styles & use cases in one instance
- Data model flexibility
- Sophisticated hierarchy mgmt—e.g., relationship charts, rules mgmt
- Full lifecycle with DG framework
- Integrated DQ engine (Trillium)
- Full SOA
- Future integration of Software AG's BPM strengths to MDM
- Price & time to value via pre-packaged templates

Caveats

- Lack of market awareness of MDM acquisition
- SI channel ramping up
- Under invested in marketing
- Modest number of CDI references
- Process-oriented MDM approach is new to market

1 - Enterprise data model covering all domains, or a portion, generates the framework of the MDM solution which can be extended or configured
2 - Supports all architectural styles except Registry; supports operational MDM & analytical MDM use cases
3 - Avon, Cargill, GE, Novartis, Paraexel, Wellpoint,
Field Report:
Stibo Systems STEP 5.2

Strengths

- Deep functionality for PIM – comprehensive, well integrated (product, supplier, location)
- PIM scalability
- Quantity of PIM references¹
- Retail, Travel & Hospitality expertise
- Multi-entity MDM focus & consistent product strategy
- Deep pockets/financial stability
- Global sales & support

Caveats

- Nascent operational MDM for ‘customer/party’
- Active data governance capabilities just emerging
- Registry strategy still maturing
- BPM strategy evolving
- Reference data strategy needed
- SI channel ramping up²
- Underinvested in marketing
- Ongoing channel conflict (minimal implementation partners)

¹ - BlueLynx/GP, bol.com, Fairchild Semiconductor, General Motors, Hagemeyer, Home Depot, Mitchells & Butlers, Office Depot, Oriental Trading Company, Sears, Target, …
² - Acuity Group, ACN, Deloitte, EMC, Logica, Platon, Sapient, Steria
³ - STEP 5.3 is full-stream multi domain MDM with an all new entity model at the core

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Field Report: Talend Enterprise MDM v5.x

**Strengths**

- XML-based MDM with non-intrusive SOA
- Multi-entity MDM support – customers, suppliers, products, organization, employees, ...
- Lower cost than proprietary MDM solutions
- Proven commercial open source expertise & business model from recognized market leader in open source data integration
- Integration with Talend open source DQ & data integration (ETL) capabilities; nascent BPM integration
- Rapidly evolving “big data” alignment – e.g., Hortonworks

**Caveats**

- Lacking "active data governance" (upstream)
- Lacking identity resolution
- Under invested in marketing
- Uncertain strategy re: software-as-a-service MDM capability

1 – 80 projects worldwide using the 'free' version
2 – BBC; Berlingske; Boston College; Federal Reserve Board; Gendarmerie; Iron Mountain; RTE; SAB Miller; SourceMedia; St. Judes’s Research Hospital; Swisscom; The Weather Channel; Time-Warner Cable; Veolia; Vinco Group …
Field Report: Teradata | Aprimo MDM 3.1

Strengths

- Analytical & operational MDM + party & product & financial & RDM
- Full lifecycle & process flows for multi-entity support
- Consolidated EDW & MDM platform + focus on reference data mgmt for DW
- Integration with Teradata DB, Profiler, Aprimo Relationship Manager, et al
- CDI & PIM accelerators
- DQ integration with Trillium, SAP DQM, SAS DataFlux, Informatica Identity Resolution (matching)
- Packaged CDI Solution planned for MDM 3.2 for release in June 2012

Caveats

- Modest # references
- Active data governance strategy evolving
- SI support ramping up

1 - ANZ Bank; top 3 W/W CPG Co.; Electronic Arts; Hershey’s; Intel; large Indonesian mobile communications firm; MillerCoors; NAB; NCR; Pratt & Whitney; Telstra; Teradata; Vodafone Australia
Field Report: TIBCO MDM

Strengths

- Well-suited for both operational & collaborative MDM
- Full lifecycle & process flows for multi-entity support + reference data
- Multi-hub, multi-application MDM deployment
- Active data governance via integrated BPM/workflow for collaborative authoring & orchestration
- Integrated (Trillium) Data Discovery & Data Quality
- Architecture fits well with real-time & distributed services nature of SOA + BPM
- Import/export of hierarchical data from multiple sources simultaneously
- Intelligent MDM-integrated search

Caveats

- Missing formal CDI solution – i.e. packaged more as a “kit” ... vertical CDI solutions due 2H2012
- BPM dominates MDM within TIBCO
- Under invested in marketing
- Prof svcs org somewhat competitive vs. SIs

1 – formerly Collaborative Information Mgr (CIM) 8.x
2 – Covance, Digikey, GFI Group, Lafarge, Lion Nathan, Mahindra & Mahindra, RAC of WA, Rent-a-Center, Paul Hartmann AG, Sanofi Pasteur, State Compensation Insurance Fund, Vodafone...
Field Report: VisionWare MultiVue Identification Server

**Strengths**

- Analytical-capable + operational-focused MDM
- Multi-entity – people, property & assets
- Public sector expertise
- Sophisticated, yet well-packaged core MDM functionality – e.g., DB partitioning, web services, BPM
- Mid-market pricing
- Microsoft as channel
- Microsoft software stack affinity
- Longevity – e.g., 100+ installations

**Caveats**

- Strategy beyond public sector just beginning
- UK-centric
- Currently mid-market scalability¹ – e.g., millions vs. 10s of millions of master records
- Matching algorithms for data custodianship evolving – not automated self-tuning level yet
- Data governance strategy evolving
- Registry-orientation more than persisted data hub

¹ – Product tested up to 50 million records with no performance issues; additional future testing with Microsoft Scalability labs
Persisted customer or product data hubs

** ASG
** BackOffice Associates
** Black Watch Data
** Cognizant + Collibra
** DataFlux
** EMC/ RSA/ Archer
** IBM MDPH
** IBI MD Center
** Informatica IDD

** Kalido DGD
** Microsoft DG Console
** Oracle DGF
** Orchestra Networks
** SAP MDG
** Software AG
** Utopia
** Varonis
Master Data Governance
“Top 10” Technical Evaluation Criteria

1. Methodology
2. Data exploration/profiling
3. Data model, policy model & business glossary mgmt
4. Rules/policy mgmt
5. Decision rights mgmt
6. MDM hub integration
7. Enterprise application integration
8. Integrated metrics
9. Multi-level, role-based security
10. E2E data lifecycle support

Understanding scope, diversity & limitations of currently-marketed MDG offerings is tremendously challenging
The MDM Institute

MDM Research
- Strategic Planning Assumptions
- MDM Product Reviews
  - Top 50 MDM Products
- MDM Alerts
- Top 50 MDM SI Reviews
- Research Agenda
- Best Practices
- Case Studies
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News... Click here to read or close
Twitter Updates
- Cognizant announcing IBM partnership for “Customer in the Cloud” @ MDMDG in NYC...
  #MDMDG #MDM #DataGovernance
  http://t.co/1Aioqf9
  about 20 hours ago
- Lots of expo hall networking & discussions re: reference data & BPM w/ 20+ exhibitors...
  #MDMDG #MDM #DataGovernance
  http://t.co/35KQ5U3
  about 17 hours ago
- Westinghouse & BackOffice Assocs case study keynote on SAP #DataGovernance of vendor & material...
  #MDMDG #MDM #DataGovernance
  http://t.co/x46Wy8s
  about 20 hours ago
- BCBS NC’s Pete Storer reinforcing need for Reference Data (+ #DataGovernance) in conference keynote...
  #MDMDG #MDM
  about 21 hours ago
- #MDMDG standing room only for IBM keynote

QUOTE of the day: "Invaluable information on the present & future of CDI & MDM for those who are thinking about it, doing it or have done it & are staying in tune!" ~Tom Carlock, VP Enterprise Information Integration, The CIT Group (New York, New York)
MDM Product Reviews

We did the research, you read the results. MDM Institute Competitive Field Reports are your best up-to-date sources for independent, authoritative, and relevant insight into the leading MDM products**:

- D&B / Purisma Data Hub
- DataFlux qMDM
- Heiler Software
- IBI Master Data Center (MD Center)
- IBM MDM Server (& WebSphere Product Center for MDM Server)
- IBM Initiate Master Data Service
- Informatica MDM Hub (Siperian)
- Kalido MDM
- Microsoft Master Data Services
- Oracle Customer Data Hub
- Oracle Hyperion DRM
- Oracle Customer Master (Siebel UCM)
- Oracle Healthcare Master Person Index (Sun MDM Suite)
- Orchestra Networks
- Riversand
- SAP NetWeaver MDM & MDG
- Software AG webMethods OneData
- Stibo Systems
- Talend MDM EE
- Teradata MDM
- TIBCO MDM (CIM)
- VisionWare

** Persisted data hubs with minimum 5 installs
Field Report: IBM Master Data Policy Hub (MDPH)

Strengths

- Common DG layer across Standard & Enterprise MDM Server editions
- Ultimate integration with Guardium, Optim, et al
- Ongoing integration w/BPM (BPMExpress a.k.a. Lombardi)
- IBM BAO/GBS teams available w/w

Caveats

- Lack of integration w/ Reference Data asset
- Big IBM stack req’d
- Lack of integration with Smart Governance Council assets
Field Report: Informatica Data Director (IDD)

**Strengths**
- Good for fundamental MDM administration as data steward console
- Task-oriented & business process-driven
- Access to history & data lineage
- Optimized around DQ anomalies
- Flexible security model

**Caveats**
- Out-of-step with main INFA MDM process flow
- Too easy for end users to trash performance with ill-advised queries

1 - Formerly Siperian Business Data Director
2 - Informatica Data Director (IDD) is data steward console application for entity lifecycle management
## Field Report: Kalido Data Governance Director (DGD)

### Strengths
- Visionary leader
- UBM methodology
- Flexible decision rights via mapping of roles & responsibilities
- Export of policy compliance metrics
- Policy-focused solution incl remediation processes
- Proactive workflow for data & processes
- Accenture heritage

### Caveats
- Late-to-market integration with Kalido MDM
- One-way trip/export into Kalido MDM
- Only supports Kalido BPM
Field Report: SAP Master Data Governance (MDG)

**Strengths**
- Ready-to-use governance applications integrated w/SAP ERP
- Predefined & extensible data model
- Prebuilt & flexible workflows
- Multi-mode data replication
- Integration with BOBJ data quality/validation assets (cleansing, matching, & consolidation)
- Verifiable audit trail

**Caveats**
- Late-to-market with B2C customer
- Lacks flexible hierarchical management of data
- Lacks master data within transactions
- Lacks identification of data pattern profiles
- Nascent cloud-enablement & integration
- Nascent big data & analytics support for social CRM data
Field Report: Utopia

Strengths

- Strong growth North America\(^1\), \(^2\)
- SAP, Open Text & ACN partnerships
- Utopia Lab/COEs, Uni
- Multiple entry points for sales in migration, quality & governance
- Support (via Open Text) to integrate unstructured
- Full E2E lifecycle methodology (EDLM) – Assessment, Strategy, Roadmap
- Cloud & HANA
- MENA\(^3\) depth

Caveats

- No longer sole preferred partner for SAP MDM/MDG as of 2012

\(^1\) – 250% growth despite torpid economy
\(^2\) – Captaris, Coca Cola Enterprises, ConAgra, CSL Behring, CVS/Caremark, Dubai Aluminum, DuPont, ExxonMobil, Grainger, Harley-Davidson, John Deere, Kellog’s, Kennametal, Kimberly-Clark, Kraft, Malaysia Airlines, Neptune Orient Lines, Newmont Mining, Pertamina, RasGas, Saudi Arabian Airlines, Suncor Energy, Tyco Electronics, Wolters Kluwer
\(^3\) – MENA = Middle-East & North Africa
** General-purpose or multi-domain RDM, not industry-specific solutions such as capital markets, pharma, e.g., AIM, Asset Control, Eagle, Golden Source, Kingland Systems 360 Data, and RSD
Reference Data Management
“Top 10” Technical Evaluation Criteria

1. Ability to map reference data
2. Administration of reference data types
3. Management of reference data sets
4. Architecture
5. Hierarchy management over sets of reference data
6. Connectivity
7. Import and export
8. Versioning support
9. Security & access control
10. E2E lifecycle management

Understanding scope, diversity & limitations of nascent RDM offerings is challenging
Field Report: IBM MDM Reference Data Mgmt Hub

Strengths

- Purpose-built, commercially proven RDM
- Utilizes IBM MDM foundation
- Full function with strong taxonomy support & mappings
- Ease of deployment, implementation, & use
- Market momentum

Caveats

- Lack of BPM integration & workflow (needs configurable workflow)
- Lacks Cloud architecture & SaaS offering
- Perception of excessive software stack foundation
- Missing adapters for other IBM software (Discovery, etc.) & other major apps such as Oracle & SAP

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Acknowledge no single MDM vendor “does it all well”
- CDI vs. PIM
- Analytical vs. Operational vs. Collaborative MDM
- Batch vs. real-time

Recognize that industry expertise matters

Test drive identity resolution/matching & consulting expertise

Reference check based on complexity of use case & scalability

Invest on data governance capabilities contractually with specific deliverables
Promote MDM as essential business strategy with IT deliverables to leverage high-value info used repeatedly across many business processes

Position MDM as enabler of key business activities such as improving customer communication & reporting - rather than an important infrastructure upgrade

Begin MDM projects focused on either customer-centricity or product/service optimization

Plan for multi-entity MDM solutions evolving from “early adopter” status into “competitive business strategy” during 2012
How to Leverage the MDM Institute

- **Kick start the “MDM evaluation process”**
  - Attend public workshop
  - Bring workshop on-site

- **Fine tune in-process MDM strategies**
  - Due diligence on reference checking & contract details

- **Stay ahead of curve via MDM Business Council**
  - Re-qualify every 6 months via survey
  - Receive MDM Alerts & access to Web-hosted research

- **Increase your knowledge & negotiating strengths via MDM Advisory Council Membership**
  - Participate in monthly email surveys & receive updated industry scorecard
  - Receive monthly MDM consultation via telephone

“Independent, Authoritative, & Relevant”

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About the MDM Institute

- Founded in 2004 to focus on MDM business drivers & technology challenges
- MDM Advisory Council™ of 150 Global 5000 IT organizations with unlimited advice to key individuals, e.g. CTOs, CIOs, data architects
- MDM Business Council™ website access & email support to 35,000+ members
- MDM Road Map & Milestones™ annual strategic planning assumptions

- MDM Alert™ newsletter
- MDM Market Pulse™ monthly surveys
- MDM Fast Track™ one-day public & onsite workshop rotating quarterly through major North American, European, & Asia-Pacific metro areas
- MDM SUMMIT™ annual conferences in London, Madrid, NYC, San Francisco, Singapore, Sydney, Tokyo & Toronto

About Aaron Zornes
- Most quoted industry analyst authority on topics of MDM & CDI
- Founder & Chief Research Officer of the MDM Institute
- Conference chairman for DM Review’s MDM SUMMIT conference series
- Founded & ran META Group’s largest research practice for 14 years
- M.S. in Management Information Systems from University of Arizona

"Independent, Authoritative, & Relevant"
Advisor agrees to provide Institute’s consultants with advice & insight regarding the use of MDM software & related business processes at Advisor’s convenience.

Advisor agrees to participate in at least one fifteen (15) minute survey teleconference call every sixty (60) days.

Optionally, Advisor may respond to the bi-monthly survey request via email or Internet-based survey fulfillment.

Results of such MDM market research surveys shall be aggregated by the Institute & made available to all Advisory Council members.

In no case, shall any Advisor-specific survey information be made available to other parties unless Advisor has specifically agreed to the release of such information in writing.

150 organizations who receive unlimited MDM advice to key individuals, e.g. CTOs, CIOs, & MDM project leads

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