



18 Nov, 2025

How to Accelerate your Onboarding and Safeguard your MDM SaaS Implementation

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Where data & AI come to **LIFE**

Housekeeping Tips



- Today's Webinar is scheduled for **1 hour**
- The session will include a webcast and then your questions will be answered live at the end of the presentation
- All dial-in participants will be muted to enable the speakers to present without interruption
- Questions can be submitted to "All Panelists" via the **Q&A option** and we will respond at the end of the presentation
- The webinar is **being recorded** and will be available on our [Success Portal](#) - where you can download the **slide deck** for the presentation. The link to the recording will be emailed as well.
- Please take time to complete the **post-webinar survey** and provide your feedback and suggestions for upcoming topics.

Safe Harbor

The information being provided today is for informational purposes only. The development, release, and timing of any Informatica product or functionality described today remain at the sole discretion of Informatica and should not be relied upon in making a purchasing decision.

Statements made today are based on currently available information, which is subject to change. Such statements should not be relied upon as a representation, warranty or commitment to deliver specific products or functionality in the future.

Agenda

1 Welcome!

2 Informatica MDM SaaS

3 Onboarding, Planning & Provisioning

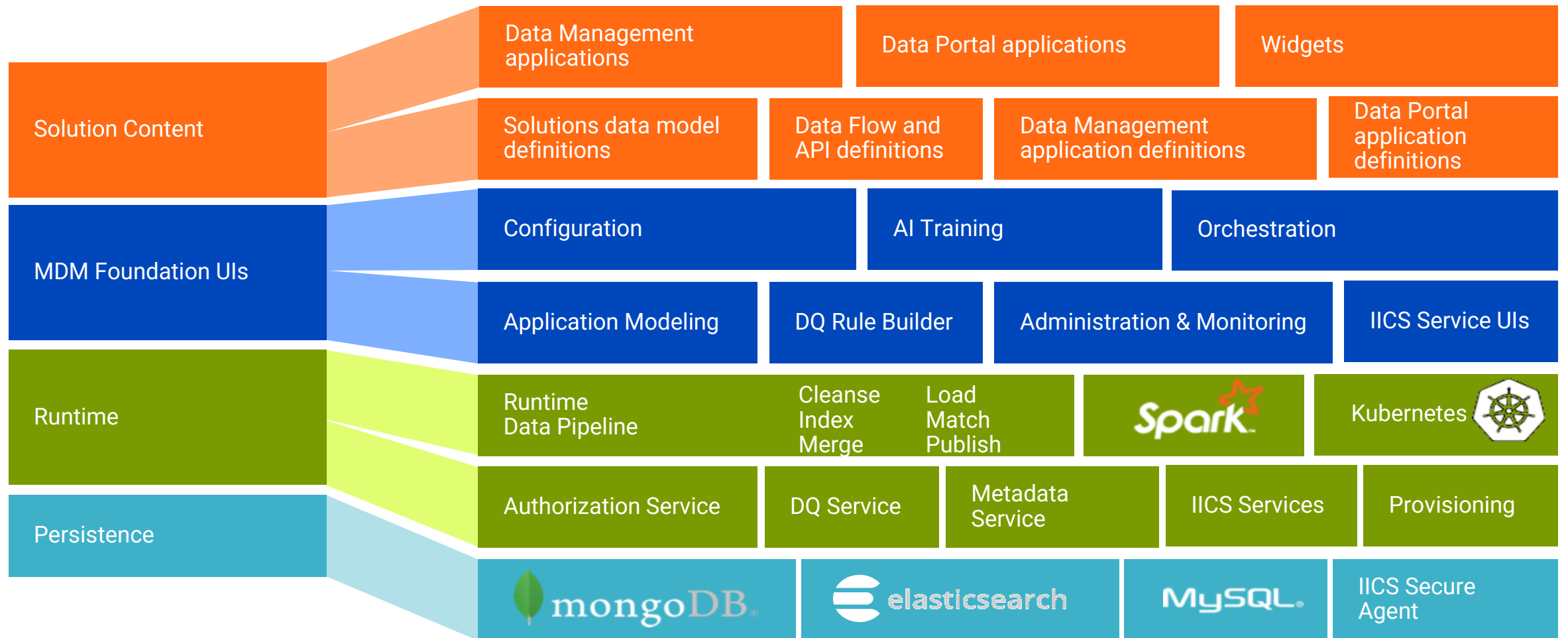
4 Configuration Best Practices

5 Data Onboarding & Patterns

6 Security & Governance

The Most Modern Microservices Architecture for MDM

Delivers unmatched flexibility and scalability



The Cloud Transformation of MDM

On-Premises	MDM SaaS
6-12 month implementations	3-6 month implementations
Hardware procurement delays	Rapid provisioning (3-5 days)
Complete infrastructure control	Elastic scalability
Painful upgrade cycles	Continuous updates
Fixed capacity constraints	Pay-as-you-grow model

On-Premises	MDM SaaS
Relational Model (RDBMS)	NoSQL – Document Style DB
Direct DB Access & API	B360 Connectors & API
External ETL/DQ for Integrations	CDI/CDQ/CAI for integrations
BO Matching	XREF Matching
Match Paths across any objects	Match within Business Entity
LDAP Authentication	SSO with AD Groups/Roles
SIF / BES API's (XML/REST)	B360 API's (REST)
IDQ Webservices integration	CDQ native integration
ActiveVOS workflows	CAI workflows
Customization via UserExits & External Calls	EVO (Enrichment & Validation Orchestrator) Framework

Onboarding and Planning

IDMC Onboarding

Bringing the teams together

- Environment Strategy
 - Org Instances
- Capacity Planning
 - Data Volumes, Concurrency, Peak users and transactions
- MDM Org Provisioning
 - Geography, Network, Compliance, IdP
- Secure Agents
- Know your Informatica Team
 - CSM, CSA,

Informatica IDMC Secure Agents sizing

Secure Agent	Input Vol Size	Load window	# Agents	v-CPU	RAM	Disk	EC2
Small	200 GB	8 hrs	1	4	16 GB	300 GB	m5.xlarge
Medium	500 GB	8 hrs	2	8 (2*4)	32 GB (2*16)	600 GB (2*300)	m5.xlarge
Large	1200 GB	8 hrs	4	16 (4*4)	64 GB (4*16)	1.2 TB (4*300)	m5.xlarge
X- Large	1800 GB	8 hrs	6	24 (6*4)	96 GB (6*16)	1.8 TB (6*300)	m5.xlarge

CPU, RAM and Disk are total for # of secure agents
i.e.: for medium, 8cpu core (4 cpu core per agent)

- These numbers are representative for typical implementations, based on concurrent jobs running, amount of data to be processed, window to process data, etc....

The planning phase

Don't Skip This!

The #1 trap: Rushing to Start
Do not skip proper planning

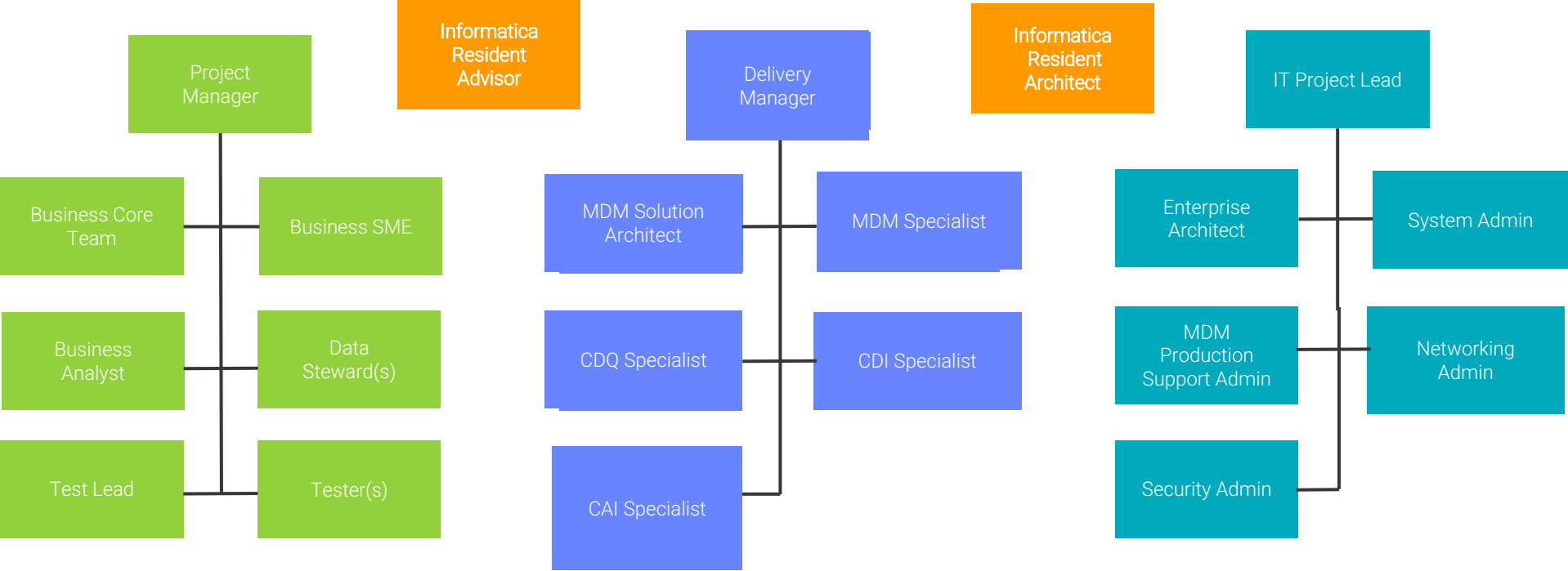
- Have clear use cases and outcomes defined for the first phase
 - Don't try to boil the ocean
 - Prioritize quick wins with business value
- Identify your technical and business SME's
 - Get their commitment to the program!
- Define key systems, integrations and dependencies
- Organize and analyze critical data elements
- Document business processes and business rules
- Be realistic with your timelines!

Establish your MDM SaaS Engagement Organization

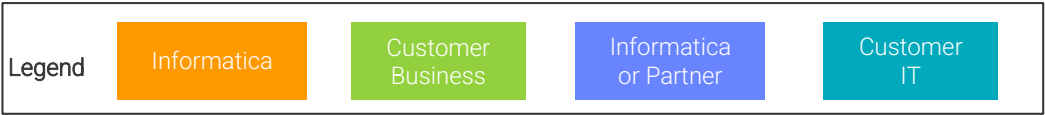
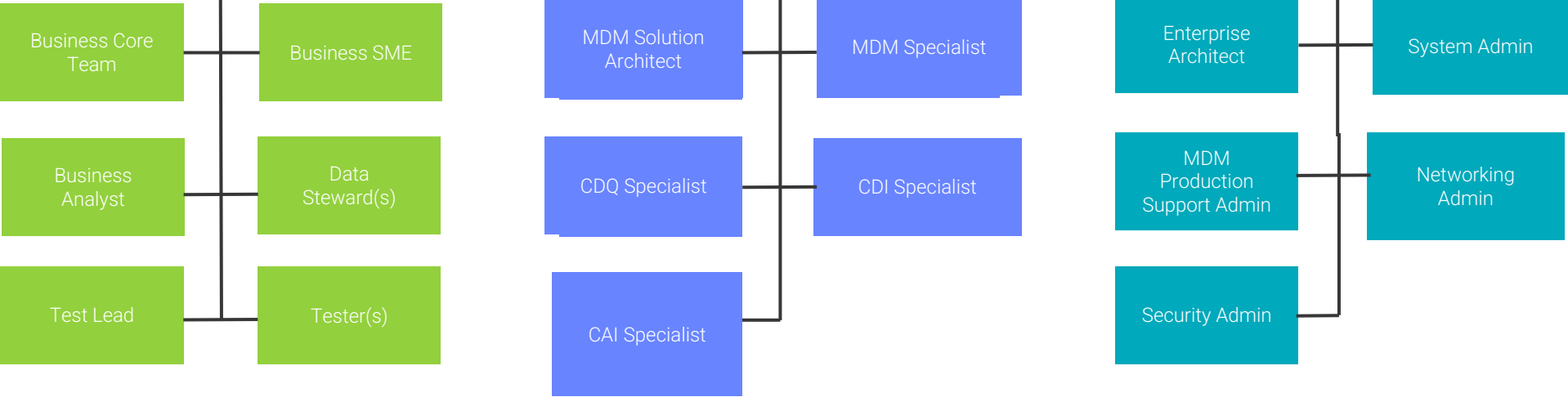
Project Governance



Project Management



Project Delivery

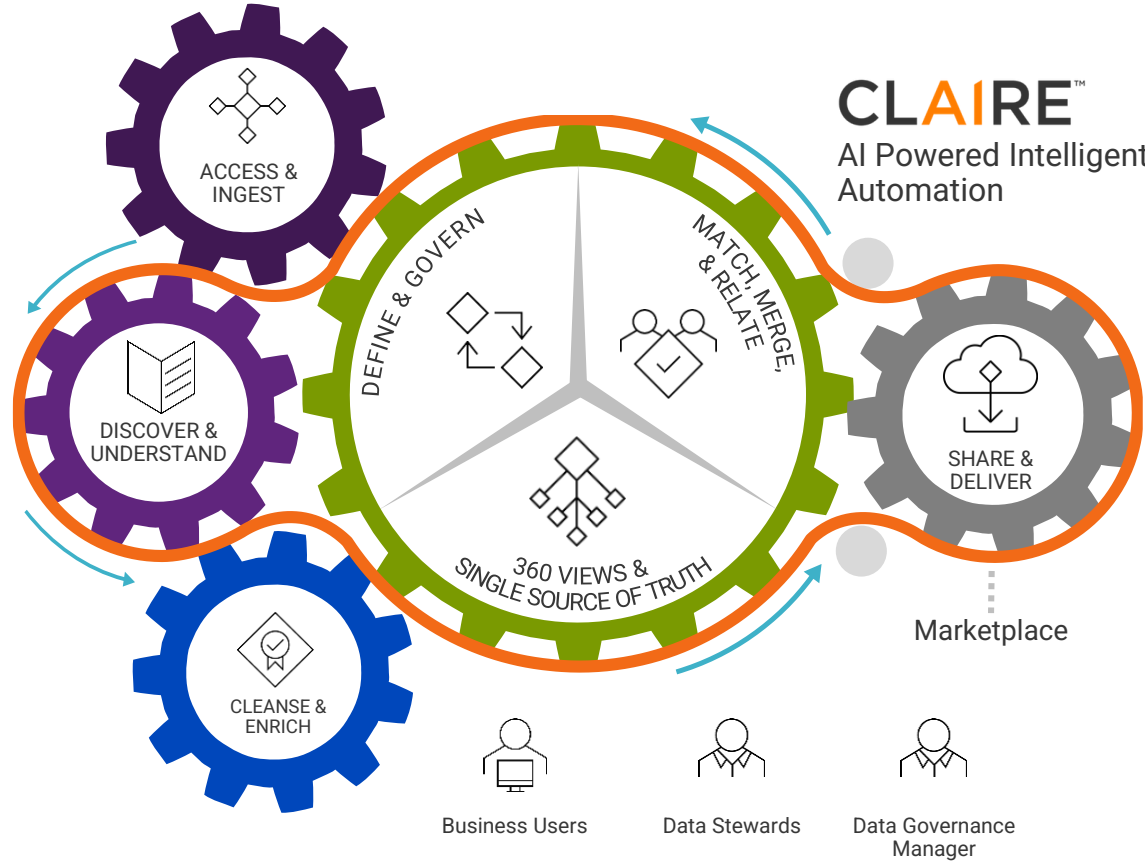
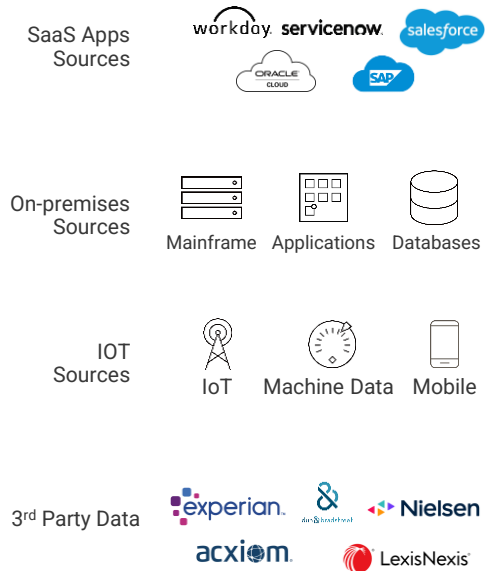


Configuration Best Practices

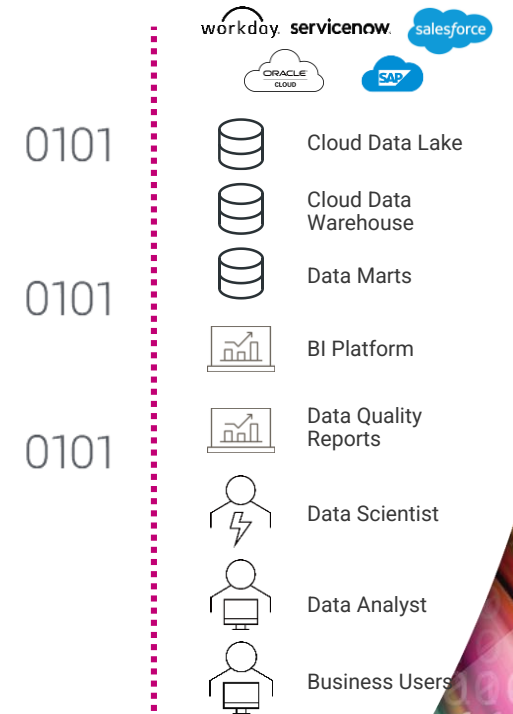
Fundamentals stay the same

MASTER DATA MANAGEMENT CLOUD

DATA SOURCES



DATA CONSUMERS



DATA MANAGERS

Reference Architecture

SALES, SERVICE, MARKETING APPLICATIONS

B

APPLICATION LAYER

C

Event Hubs

Application Servers Mainframe Databases

DATA LAYER

Informatica

DATA QUALITY & PROFILING

Discover Measure & Monitor Define Apply

DAAS - Address and GEO Services

Profile Verify Dictionary

API & APP INTEGRATION

Master Data Hierarchies Relationships

MASTER DATA MANAGEMENT

Match Merge Enrich Relate Model

Monitor

Jobs Elasticity Logs

Data Integration

Masking Mapping Task flow

Discovery

Data Catalog Data Lineage Data Provision

Administration

Secure Agent SAML Connectors

DATA GOVERNANCE

Policy Enforcement Monitor Risk Data Marketplace

Sales Applications

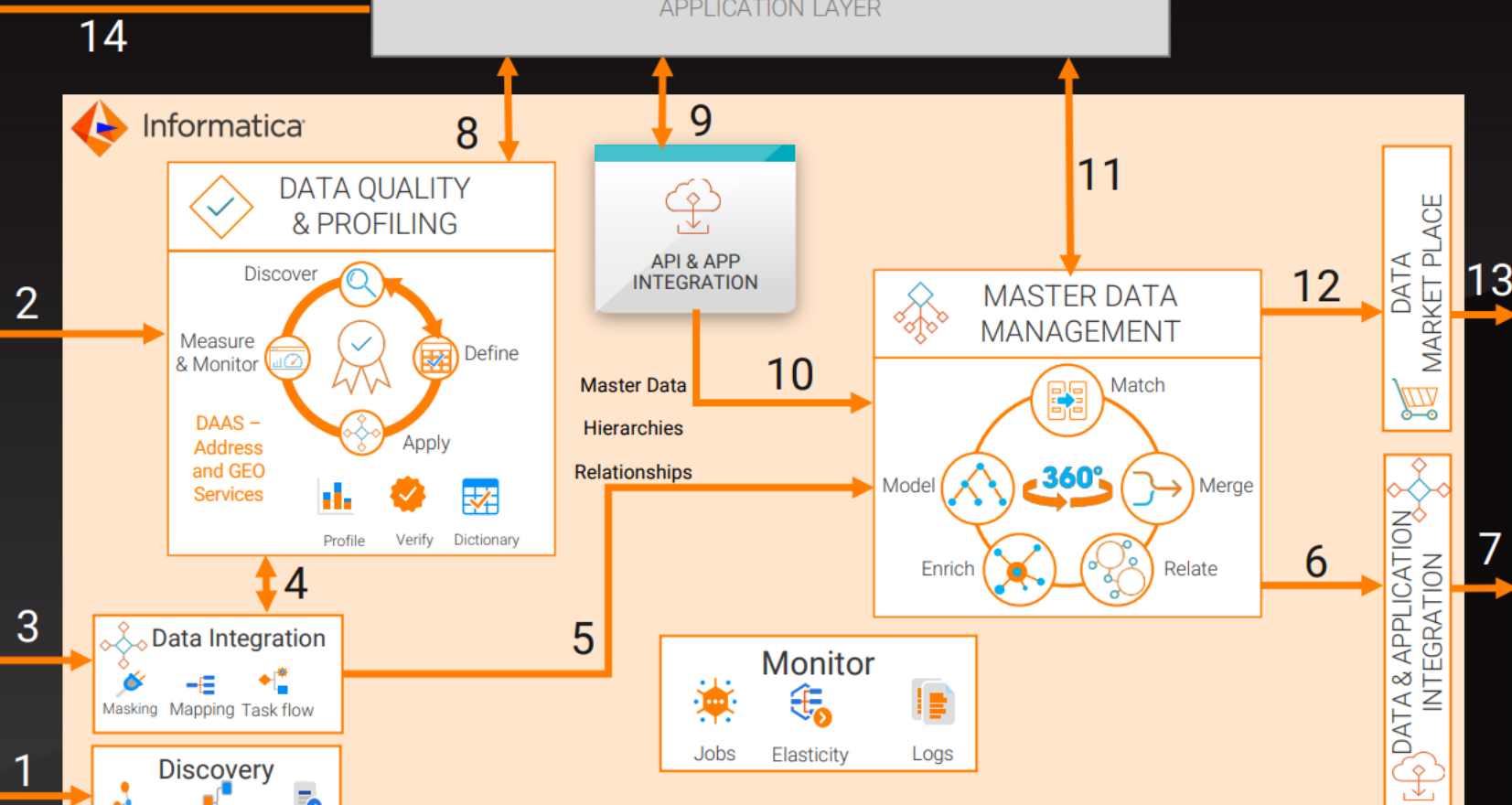
Marketing Applications

Service Applications

Data Warehouse / Data Lake

Advanced Analytics

Data Science



A



Data Profiling

Retail_Store_data | Profile run 1 of 2 | 16 of 16 Columns | 0 of 1 Rules | 28715 Rows (All rows) | Aug 2, 2022, 2:46:40 PM

Results | Definition | Rules | Schedule

View: Columns and Rules | with: All Statistics

Columns	Value Distribution	% Null	# Null	% Distinct	# Distinct	% Non-
County		0%	0	0.22%	62	99.78%
License_Number		0%	0	100%	28715	0%
Operation_Type		0%	0	0%	1	100%
Establishment_Type		0%	0	0.29%	83	99.71%
Entity_Name		0%	0	77.01%	22112	22.99%
DBA_Name		0.02%	7	91.83%	26369	8.15%
Street_Number		0.61%	176	29.63%	8508	69.76%
Address_Line_1		0%	0	96.1%	27596	3.9%
Street_Name		0%	0	30.85%	8859	69.15%
Address_Line_2		100%	28715	0%	0	0%
		100%	28715	0%	0	0%
		0%	1	4.98%	1431	95.02%
		0.04%	12	0.01%	2	99.95%
		0%	0	5.38%	1544	94.62%
		0%	0	3.03%	870	96.97%

New

Choose the asset type you want to create

- Catalog Source**
 - Qlik Sense**: A business intelligence tool to connect to data and create reports.
 - QlikView**: A business intelligence tool to connect to data and create reports.
 - Salesforce**: A cloud-based platform for customer relationship management services and enterprise applications focused on customer service.
 - SAP BusinessObjects**: A business intelligence tool to connect to data for data reporting, visualization, and sharing.
 - SAP BW**: A data warehouse product of SAP that can transform and consolidate business information from any source system for reporting, ar
 - SAP BW/4HANA**: An enterprise data warehouse platform that captures, stores, and consolidates enterprise data.
 - SAP ERP**: An Enterprise Resource Planning (ERP) platform that incorporates the key business functions of an organization. Use this catalog so
 - SAP HANA Database**: A multi-model database system that stores data in its memory and allows high-speed processing and analytics of the data.
 - Snowflake**: A cloud-based data storage and analytics service.
 - Tableau**: A business intelligence tool to connect to data and create dashboards that can be shared.
- Customization
- Data Classification
- Lookup Table

Understand & Examine

▼ Patterns (2)

<input type="checkbox"/>	9(5)	99.98%
<input type="checkbox"/>	Others	0.02%

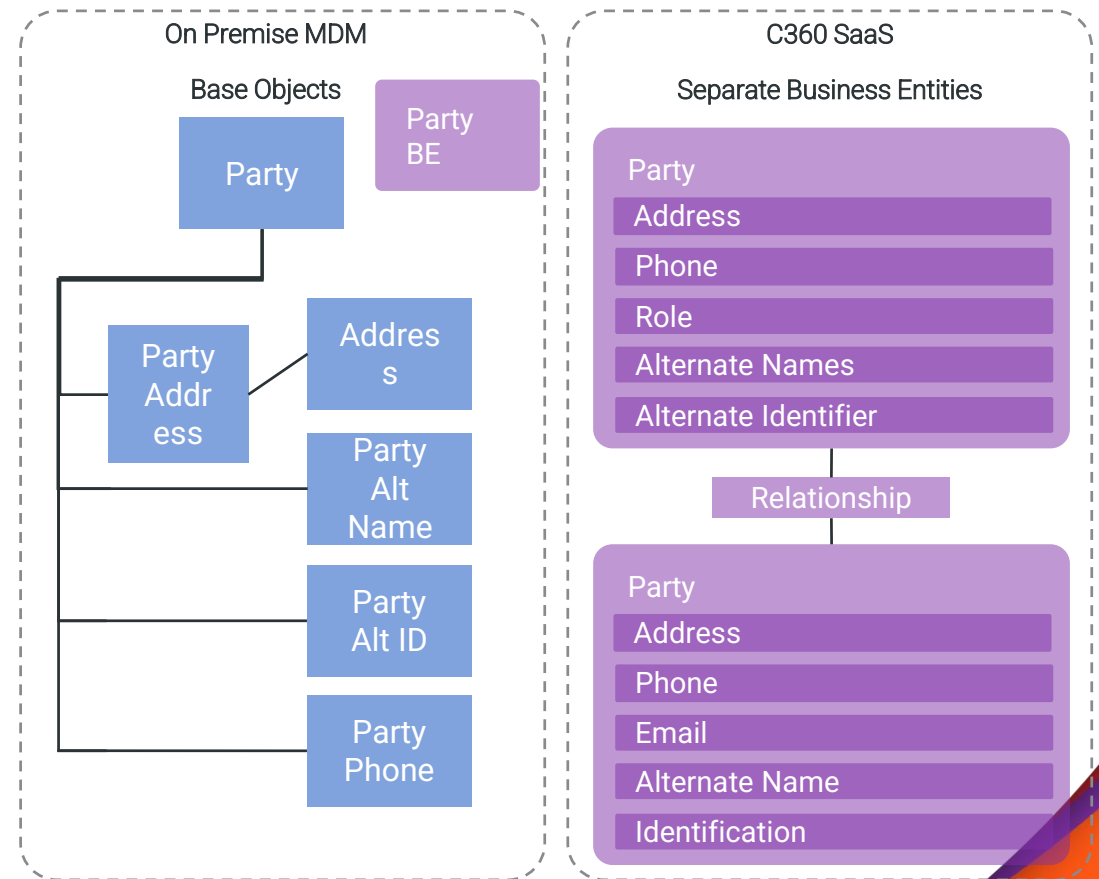
Data Preview | 10 Rows

e_2	Address_Line_3	City	State	Zip_Code
	NULL	FISHERS ISLAND	NY	6390
	NULL	FISHERS ISLAND	NY	6390
	NULL	FISHERS ISLAND	NY	6390
	NULL	FISHERS ISLAND	NY	6390
	NULL	FISHERS ISLAND	NY	6390

Data Modeling in SaaS











Data Model is the foundation of MDM Solution

- Realize the modeling difference between traditional databases and SaaS MDM. From relational to NoSQL.
- SaaS MDM uses business entities stored as JSON documents.
- Relationships are defined between Root BE's
- Not possible to relate relationships at the field group level.











Industry 360 Applications and Extensions

Industry 360 Apps

 <p>Customer 360 for Healthcare</p> <p>Enterprise view of healthcare master data for healthcare payers and providers</p>	 <p>Customer 360 for Life Sciences</p> <p>Master healthcare professionals and healthcare organizations and their affiliations</p>	 <p>Location 360</p> <p>Manage and maintain location and site master data</p>
 <p>Customer 360 for Insurance</p> <p>Enterprise view of master data across multiple policy and claim systems</p>	 <p>Legal Entity 360 for Banking</p> <p>Identification, risk assessment of legal entities for business processes and compliance</p>	 <p>Material 360</p> <p>Centralized authoring and management of material data, bi-directional integration with SAP</p>
 <p>Product 360 for Life Sciences</p> <p>Enterprise view of medicinal products across its lifecycle for IDMP compliance and more</p>	 <p>MDM 360 for Retail</p> <p>Multidomain extension for retail with customer, product, location and supplier</p>	 <p>Supplier 360 Extension for ESG</p> <p>Identify supplier ESG risk, drive ESG compliance and track supply chain emissions</p>
 <p>Securities 360 New</p> <p>Trusted and unified securities data for investment decisions and regulatory compliance</p>		

Integration and AI Recipes

 <p>Customer 360 Extension for Salesforce</p> <p>Faster data onboarding from Salesforce. Duplicate prevention with search before create</p>	 <p>Reference 360 Extension for SAP Finance</p> <p>Centralized authoring and management of finance master data</p>
 <p>Customer 360 Extension for SAP</p> <p>Easy customer data onboarding from SAP, help achieve SAP modernization goals</p>	 <p>Supplier 360 Extension for SAP</p> <p>Easy supplier data onboarding from SAP. Help achieve SAP modernization goals</p>
 <p>MDM Extension for Google BigQuery</p> <p>Power the Google customer intelligence data platform with standard models and integration</p>	 <p>MDM Extension for Snowflake New</p> <p>Power the Snowflake Data Cloud with standard models and seamless integration</p>
 <p>MDM Extension for Microsoft Fabric New</p> <p>Power the Microsoft Fabric data platform with standard models and seamless integration</p>	 <p>AI Recipes for Industry Use Cases</p> <p>Multiple AI recipes for industry use cases for MDM</p>

User Interface Design in SaaS

Data Model

Page Designer

This screenshot shows a 'Data Model' interface with a grid of attribute fields. On the left, there is a sidebar titled 'All Attributes' with a list of data types: Text, Integer, Double, Decimal, and Boolean. The main grid contains various fields such as 'First Name', 'Middle Name', 'Last Name', 'Full Name', 'Title', 'Birth Place', 'Birth Date', 'Gender', 'Image', 'Prefix Name', 'Suffix Name', 'Designation', 'Marital Status', 'Address', 'Status', 'Phone', 'Tax Details', 'Documents', 'Alternate Names', 'Email', 'Education', 'Identifier', 'Social Media', 'Employment', 'Citizenship', 'Financial', and 'Insurance'. The 'Address' field is highlighted with an orange border.

This screenshot shows a 'Page Designer' interface for a 'Person (View and Edit Page)'. It displays a form layout with a profile picture, a 'Highlighted Field: Full Name' input, and two 'Line' fields. Below the form, there are tabs for 'Person', 'Network View', and 'Add Page Tab'. A 'container-668_409' is visible at the bottom. On the right, there is a 'Properties' panel with 'Page Components' and a list of 'Standard Components' including Fields, Summary, Source Records, Related Records, Hierarchy, Relationship Graph, History, Report, Duration, Profile Tag, and Dynamic Field Definitions.

This screenshot shows a 'Properties: Address' panel. It has a 'General' tab and a 'Survivorship' section. The 'General' section includes 'Display Name' (Address), 'Internal ID' (PostalAddress), and a 'Description' field with a placeholder text: 'Defines all the fields in a standardized, global address. When you want to support more than one address in a record, select'. There is a checkbox for 'Allow multiple values' which is checked.

This screenshot shows a user profile page for 'Jonathon Bryan Walker'. The profile includes a photo, name, address (2100 Seaport Blvd, Redwood City, California), phone number (650) 385-5500, and email jwalker@waltdisney.com. The page has tabs for 'Dashboard', 'Source Records', 'Hierarchy', 'Network', 'Related Records', and 'History'. The 'Summary' section lists personal details like birth date (Apr 21, 1979), gender (Male), and marital status (Married). The 'Address (2)' section shows 'Mailing' and 'Office' addresses. The 'Phone (2)' section shows 'Personal' and 'Mobile' numbers. The 'Email (3)' section shows 'Business' and 'Personal' email addresses. A 'Social' section features a donut chart with categories for Twitter, Facebook, and LinkedIn. Below the profile, there is a 'Related Records (1)' section showing 'Polly Walker' as a spouse. At the bottom, there is a 'The Walt Disney Company (DnB Hierarchy)' section with a list of companies including A&E Television Networks, LLC, ABC Family Worldwide, Inc., Hulu, LLC, Tfc Corporation, Twdc Enterprises 18 Corp., and others.

This screenshot shows a 'Related Records' section. It contains a header 'Related Records' and a large empty box below it, suggesting a list of related records that is currently empty or not rendered.

Data Onboarding

Integration Scopes: Inbound and Outbound

BATCH

Ingress Jobs brings the data from Source Systems to MDM

CDI Mappings can be used to Ingress the data to MDM

FILE UPLOAD

File Upload from UI to Bulk Create/Update Records

REAL TIME

APIs and UI data Comes to MDM in Real Time

Leverage native API's or customize using CAI process endpoints.

BATCH

Egress Jobs take the master records out of MDM to Downstream

CDI Mappings can be used to extract and transform and load the data to Downstream

REAL TIME

Records Changed Real Time in MDM

Leverage native API's or customize using CAI process endpoints.

BUSINESS EVENTS

Asynchronous Publish of Modified data

Store the records in Middleware(e.g.: Kafka) for Downstream

Batch Integrations

Real Time Integrations

Batch Integrations

Real Time Integrations

Key Considerations

- Initial load vs. Incremental (ongoing) loads
 - Load strategies
 - Direct from source vs. staging layer
 - Delta detection & dependencies on MDM data
 - Primary key construction
 - Job frequency
- Publication frequency
 - Load Strategies
 - Direct to target vs. publication layer
 - Delta detection
 - Reporting requirements
 - Determine how MDM events are published:
 - Create, Update
 - Merge & Unmerge
 - Delete (soft-delete vs. hard-delete)

Data Quality, Validations & Enrichments

Leverage several features to enforce data quality standards



Cloud Data Quality

- Batch rules for ingress jobs
- Real-time rules UI validation and standardization



Reference 360

- Standardize attributes across the data model
- Standardize codes from source systems to enterprise code values



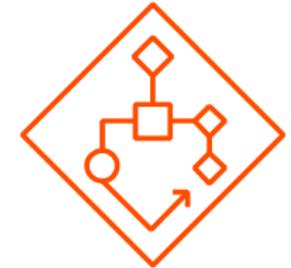
Data as a Service

- Built-in support for data verification and enrichment including:
 - Address
 - Phone
 - Email



3rd Party Integrations

- Leverage connectors and accelerators for common 3rd party integrations including:
 - D&B
 - GDSN



EVO

- Enrichment and Validation Orchestrator for complex real-time decision logic
- Supports any 3rd party integration

Approval Workflows

Automate business processes with workflows

1. Document business processes

- Which data events require approval?
- Who are the approvers?
- Any external integrations?
- Task administration requirements

2. Decide on built-in or custom workflows

- Use built-in workflows where possible
- Simplify where possible

3. Define business events

- Business Entities support create, update, delete, manual merge and unmerge events
 - Field-level configuration for update events
- Hierarchy entities support create, update and delete events

4. Configure workflows

- Follow Informatica best practices for workflow design
- Unit test all scenarios

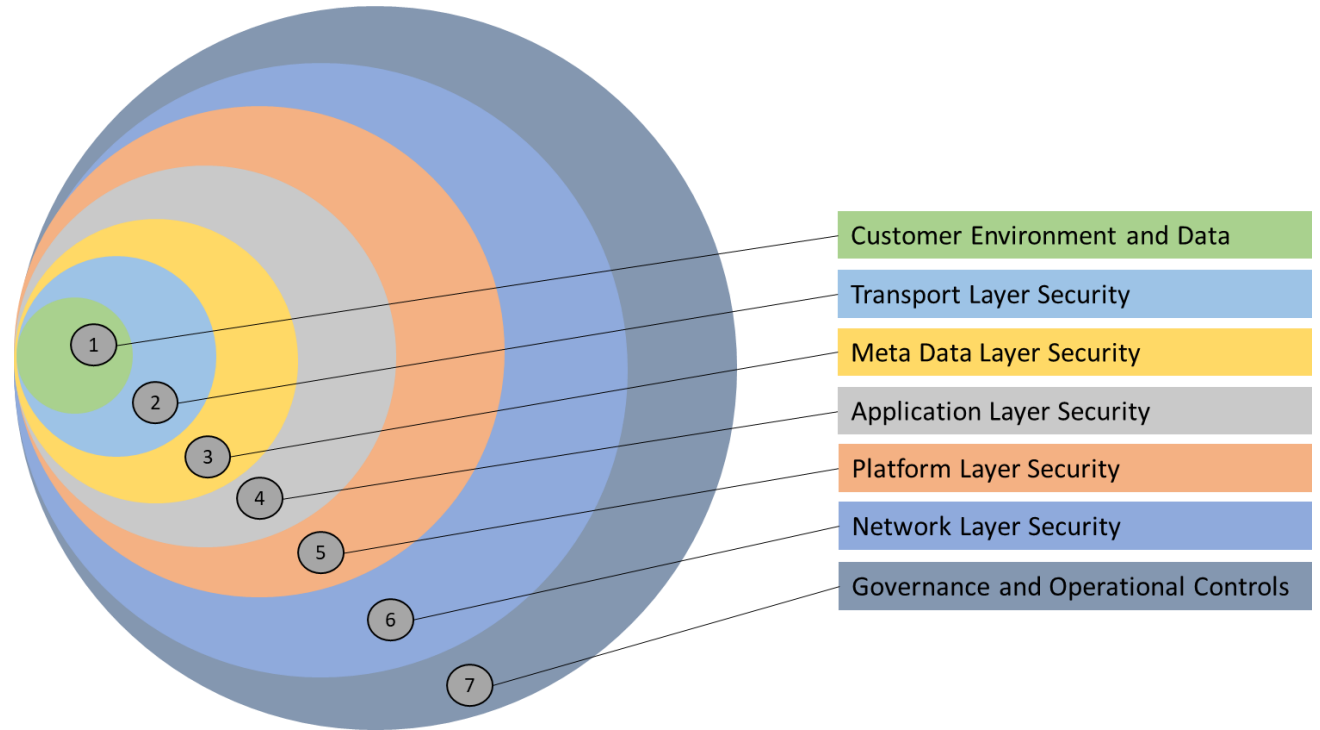
Security & Governance

IDMC Security and Defense in Depth

Shared Responsibility Cloud Security Model

The level of security provided for customers and their data is achieved not through a single control, but through multiple, overlapping layers

Informatica embeds security in every layer of the infrastructure stack and in every aspect of accessing and processing cloud integration data



Wrap-Up

Getting Started

Energizing Action: Executing the Vision for MDM Success

What Makes Implementations Succeed

1 Executive Sponsorship

MDM is a business initiative, not IT project

2 Cross-Functional Team

Include business stakeholders from day one

3 Iterative Approach

Start with one domain, prove value, expand

4 Change Management

Users must understand why MDM matters

5 Continuous Improvement

MDM is never done - plan for ongoing enhancement

Schedule working session with stakeholders to define scope

Conduct initial data profiling on most critical domain

Engage Informatica to start provisioning discussions

Draft your data governance operating model

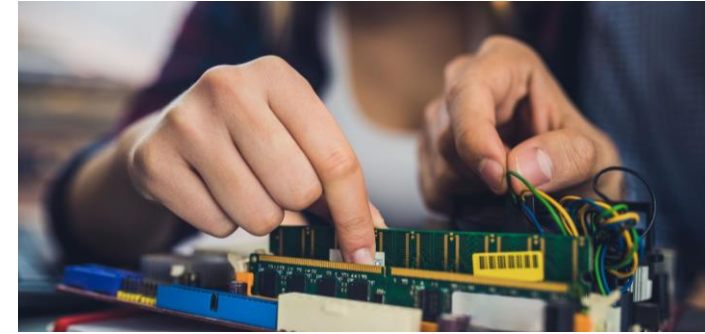
Identify and empower your data stewards

Resources & Support

- Informatica Knowledge Base
- Informatica Network Community
- Professional Services
- Administrator and Architect Certifications

Customer Success Ecosystem

Resources + Programs + Services to Co-Pilot Your Success



Self-Service Resources

- Success Portal (best practices, eLearning, demos, webinars)
- Documentation Portal (guides, videos, how-to's)
- Network Portal (communities, events, knowledge base, PAMs)
- Support Portal (case management)

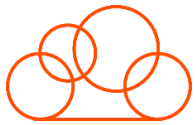
Guided Services

- Customer Success
- Ask an Expert (support engineers)
- Advisory Services (IPS)*
- Informatica University*

Hands-on Services

- Resident Program (IPS)*
- Consulting Services (IPS)*
- Managed Services (IPS)*
- System Integrators*
- Technology Partners*

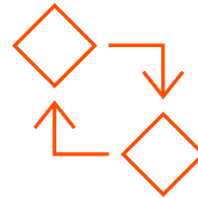
Feature Rich Success Portal



Bootstrap trial and
POC Customers



Enriched Customer
Onboarding
experience



Product Learning
Paths and Weekly
Expert Sessions



Informatica
Concierge



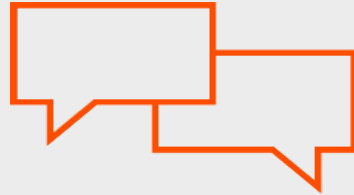
Tailored training and
content
recommendations

More Information



Success Portal

<https://success.informatica.com>



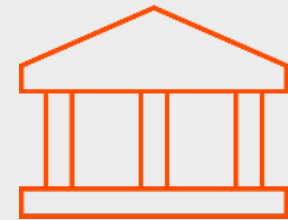
Communities & Support

<https://network.informatica.com>



Documentation

<https://docs.informatica.com>



University

<https://www.informatica.com/in/services-and-training/informatica-university.html>