



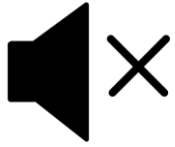
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Match Explainability in MDM SaaS

- Prasuna Hemanthraj, Senior Principal Product Manager, R&D
- Srinivasa Kalyan Karavadi, Lead Technical Support Engineer, GCS

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.

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POC Customers



Enriched Customer
Onboarding
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Product Learning
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Communities & Support

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Documentation

<https://docs.informatica.com>



University

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

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Agenda

1 Match Analysis & Explainability Overview

2 Demo

3 Questions and Answers

Need to Tune Match To Fit Your Business Needs

Matching is not an exact science, it needs to account for imperfect data

Under Matching

Suitable for:

- KYC
- Customer delivery
- Marketing campaigns with high CAC



Over Matching

Suitable for:

- AML
- Border control checks,
- Watchlists Screening,
- Risk analysis

IN BALANCE

How it works: Match Analysis & Explainability

- Pre-built dashboard that customers can use quickly and easily, to analyze the matching model and adjust it as needed, to avoid under-matching or over-matching
- Helps to build trust in the quality of matching across all stakeholders



**1. Turn on
Match analysis**



**2. Additional
queries will be
run at the end of
each match job**



**3. It will calculate
metrics for the
whole BE as of
that time**



**4. See match
analytics in
pre-built
dashboard**



**5. Drill down
to see
matching
pairs**



**6. Further drill
down to see
explainability
for that pairs**

Target Personas For Match Explainability



Ben
Business User

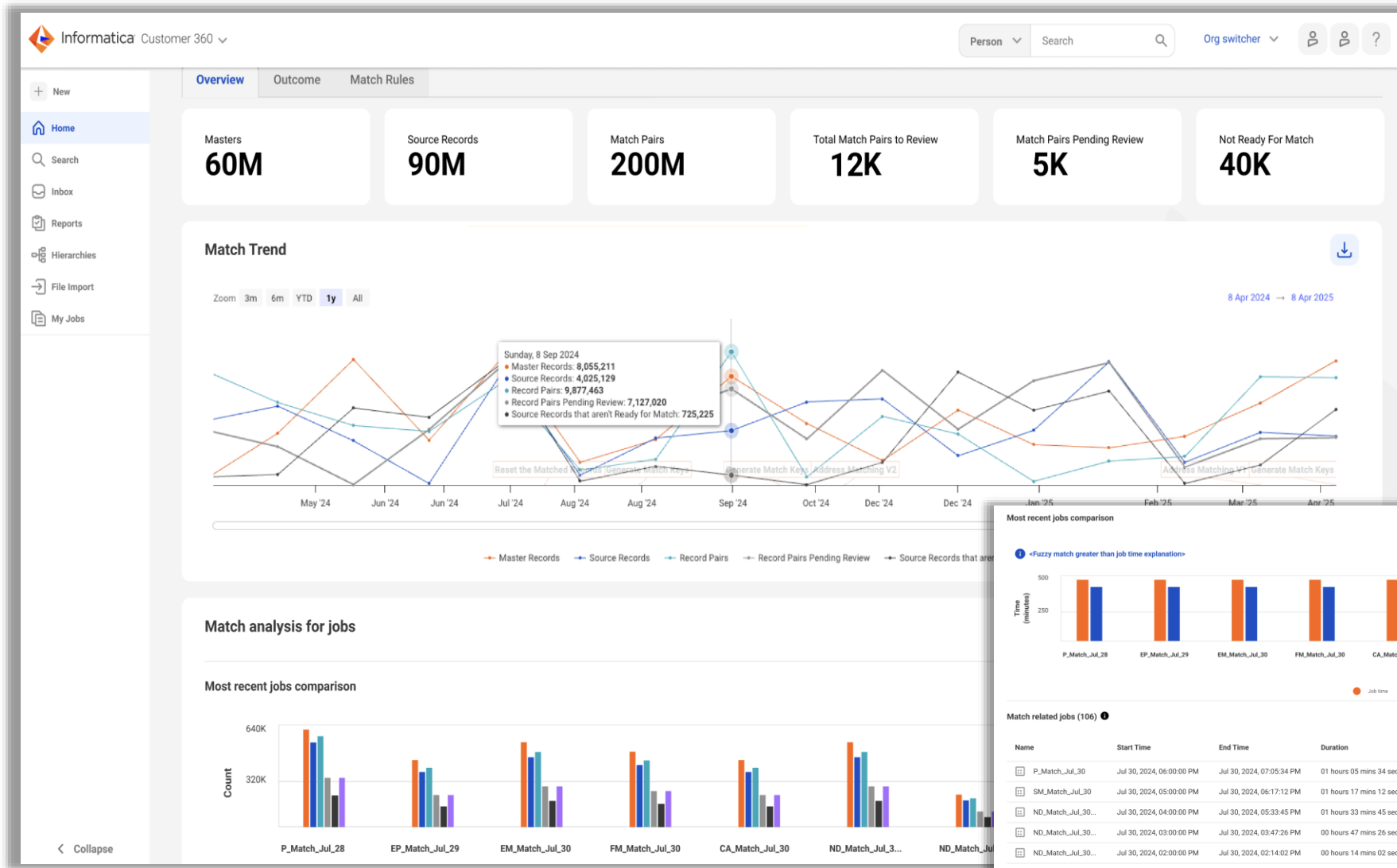
- Can I trust the quality of the data after matching?
- How much duplicate data was there in each source?
- How is data from different sources matching against each other?
- How many manual review do I have to do?



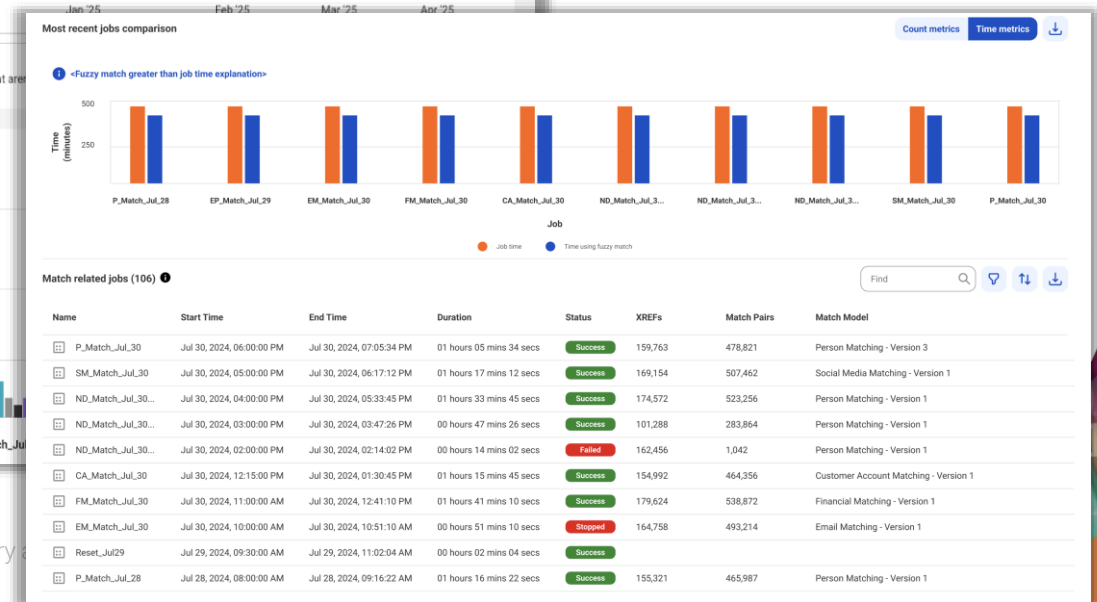
Mark
Match Expert

- Is my match model good? Should I add/remove/change any match rules?
- How many match pairs are being sent for manual review?
- Am I getting large clusters? If so, why and how do I fix it?
- How is my match model impacting match job performance?

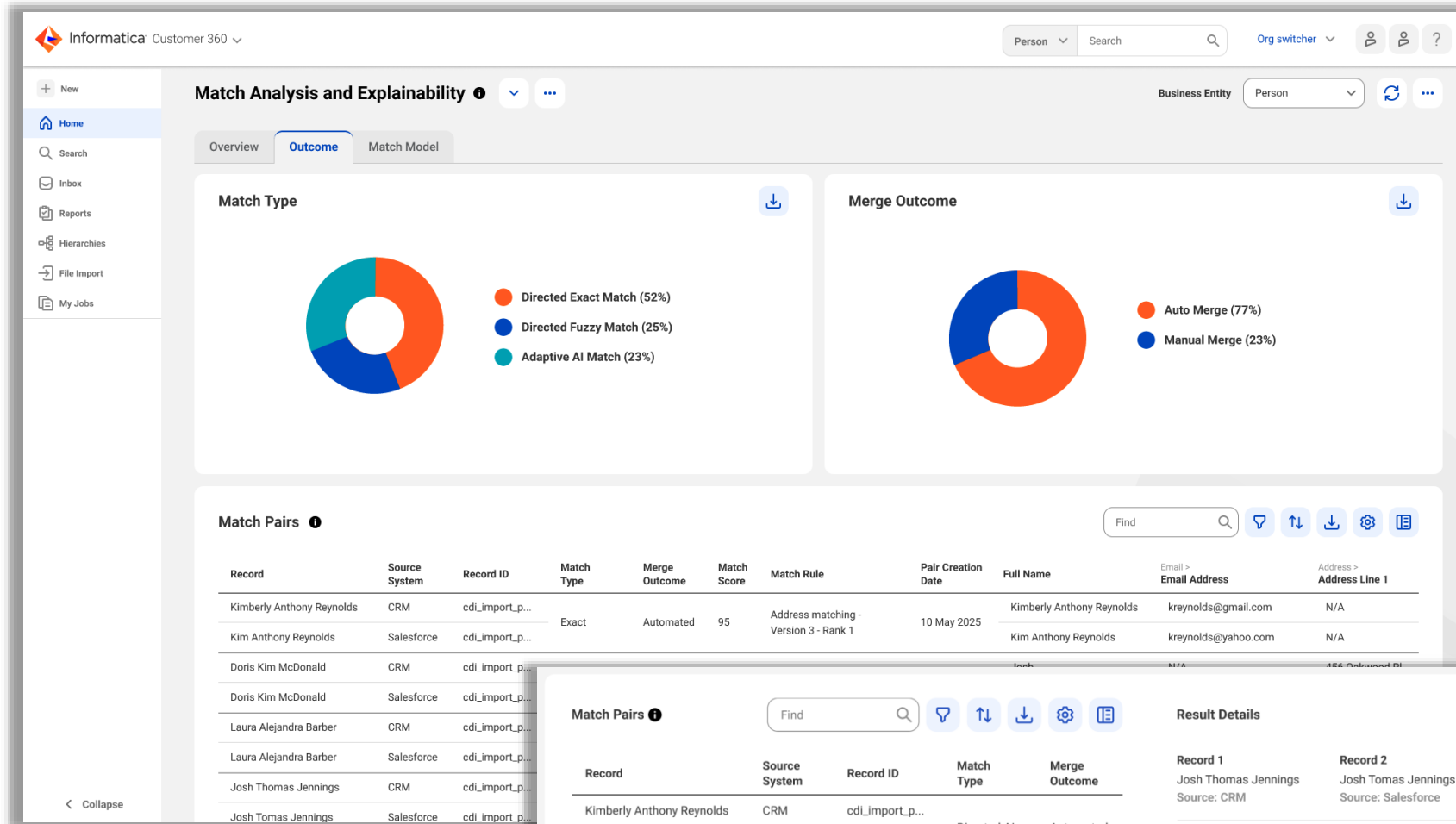
Match Analysis: Overview Tab



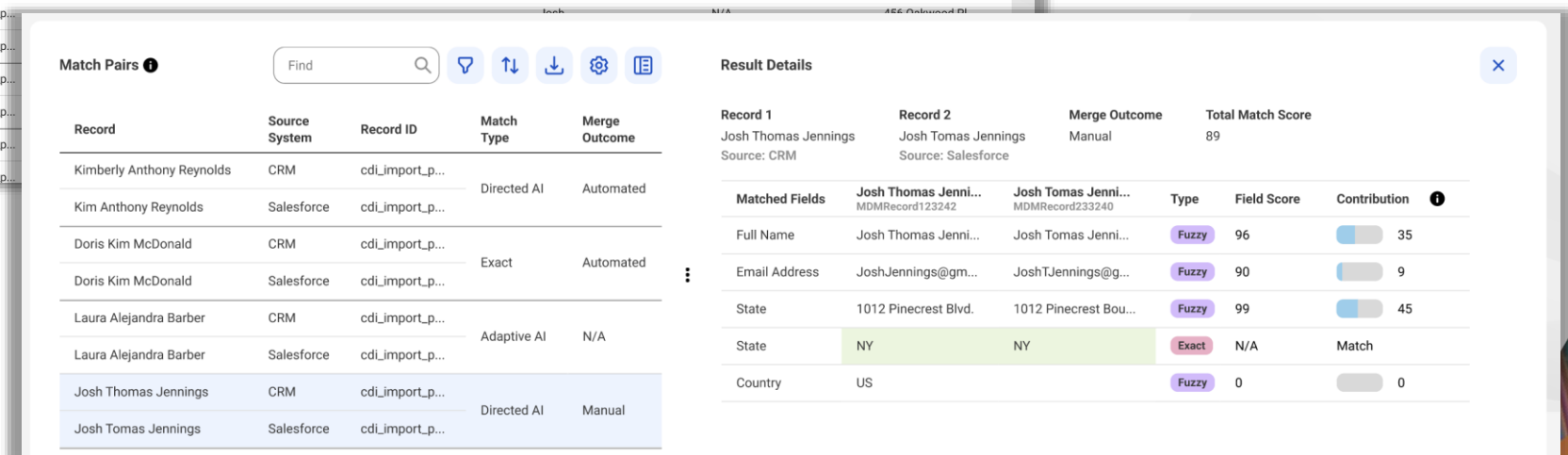
- Match KPI
- Trends of these KPIs
- Match Job details



Match Analysis: Outcome Analysis



- Analysis of Match and Merge strategy
- Drill down to relevant match pairs
- Drill further on a selected pair to see why it matched



Match Analysis: Match Model Analysis

The screenshot displays the Informatica Match Analysis and Explainability interface. The top navigation bar includes the Informatica logo, 'Customer 360', a search bar, and user controls. The main content area is titled 'Match Analysis and Explainability' and features tabs for 'Overview', 'Outcome', and 'Match Model'. A table titled 'Rank Based Rules' lists various match rules with columns for Match Model, Version, Rule's Rank, Match Strategy, Merge Strategy, Match Criterion, Rule Description, and Total Pairs. The first rule, 'Address matching' (Version 3, Rank 1), is highlighted. Below the table, the 'Details for Rule: Address matching - Version 3 - Rank #1' are shown, divided into 'Properties and Thresholds/Summary' and 'Match Field Details'.

| Match Model | Version | Rule's Rank | Match Strategy | Merge Strategy | Match Criterion | Rule Description | Total Pairs |
|--|---------|-------------|----------------|----------------|-------------------|---------------------------------------|-------------|
| Address matching | 3 | 1 | Fuzzy | Automated | Address | Strongly similar line 1 and exact ... | 155,000 |
| Address matching | 3 | 2 | Fuzzy | Automated | Person_Name | | 130,000 |
| Insurance and claim matching model long name | 3 | 1 | Fuzzy | Manual | VIN_Manufacturing | Strongly similar line 1 and exact ... | 130,000 |
| Address matching | 2 | 1 | Exact | Automated | | | 130,000 |

Details for Rule: Address matching - Version 3 - Rank #1

Properties and Thresholds/Summary:

| | |
|---|------------------------------------|
| Match Model: Address matching | Model Version: 3 |
| Match Rule ID: 123141397987 | Match Strategy: FUZZY |
| Merge Strategy: Automated | Match Criterion: Address |
| Match Level: Conservative | Merge Threshold: 90-100 |
| Total Pairs: 155,000 | |
| Rule Description: Strongly similar address line 1 matching and exact city for SFO and NYC | |

Match Field Details:

| Match Type | Field Type | Field Name | Field Property | Value |
|------------|----------------|----------------|---------------------|----------|
| Exact | | City | Segment Matching... | SFO, NYC |
| Fuzzy | Address_part 1 | Address Line 1 | | |
| Fuzzy | Address_part 2 | Address Line 2 | | |

- Analysis of Ranked Match Rules
- Drill down to relevant match pairs
- Drill further on a selected pair to see why it matched

Demo

Configuration needed to use this feature

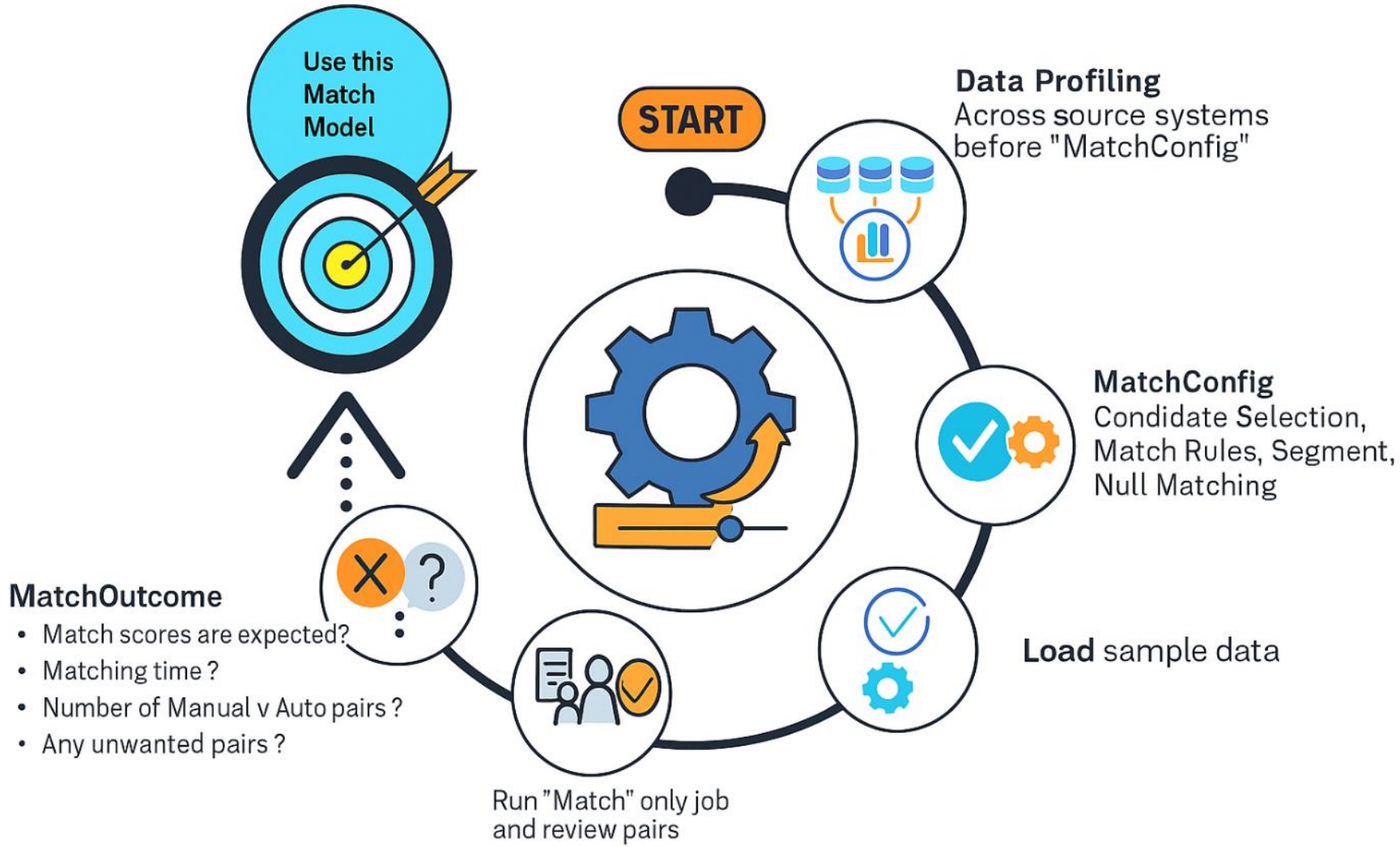
- In the B360 console, go to Global Settings > Reports & Dashboards, then select the desired Business Entities option to view the match dashboard.
- After making changes, open the related Business Application (e.g., Customer360) and click the "+" sign to add the existing dashboard

The screenshot shows the 'Global Settings' page in the Business 360 Console, specifically the 'Reports & Dashboards' section. The page has a navigation bar with 'Licenses', 'Support Access', 'Purge Data', 'Reports & Dashboards' (selected), and 'History Retention'. Below the navigation bar, there is a section titled 'Reports & Dashboards' with a description: 'Enables users to create merge history activity reports and add predefined dashboards for match outcomes.' Under the 'Reports' section, there is a toggle for 'Merge History Activity' which is turned on. Under the 'Dashboards' section, there is a toggle for 'Match Analysis and Explainability' which is also turned on. At the bottom, there is a 'Business Entities' dropdown menu with 'Person' and 'Organization' selected.

The screenshot shows the 'Match Analysis and Explainability' dashboard with an 'Add Existing Dashboard' modal open. The modal displays a list of predefined dashboards. The background dashboard shows 'Master Records' with a value of '200K' and 'Match Trends' with a 'Zoom 3m' indicator.

| Name | Description | Dashboard ID |
|----------------------|---|------------------------------------|
| Ingress Job | A predefined dashboard that displays the details of all the ingress jobs... | b360.internal.ingress_job |
| Egress Job | A predefined dashboard that displays the details of all the egress jobs... | b360.internal.egress_job |
| Match Job | A predefined dashboard that displays the details of all the match jobs... | b360.internal.match_job |
| Merge Job | A predefined dashboard that displays the details of all the merge jobs... | b360.internal.merge_job |
| Usage Statistics | A predefined dashboard that displays an overview of MDM SaaS usag... | b360.internal.usage_statistics |
| Match Analysis an... | Displays key metrics related to the match process, the match and mer... | b360.internal.match_explainability |

Overview of Match Tuning Process



[Refer: MDM SaaS Match and Merge Best Practices](#)

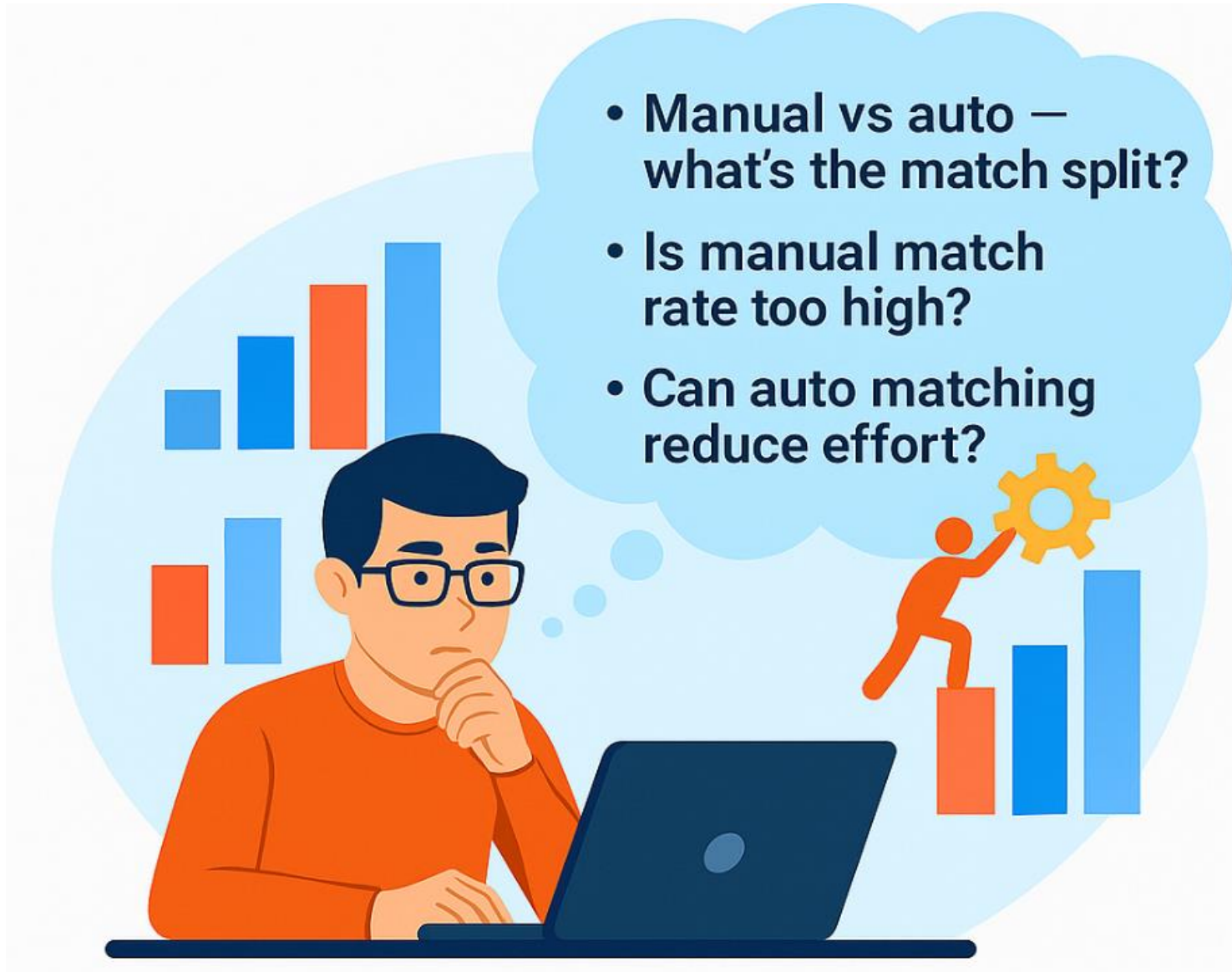
How is my match config performing so far ?



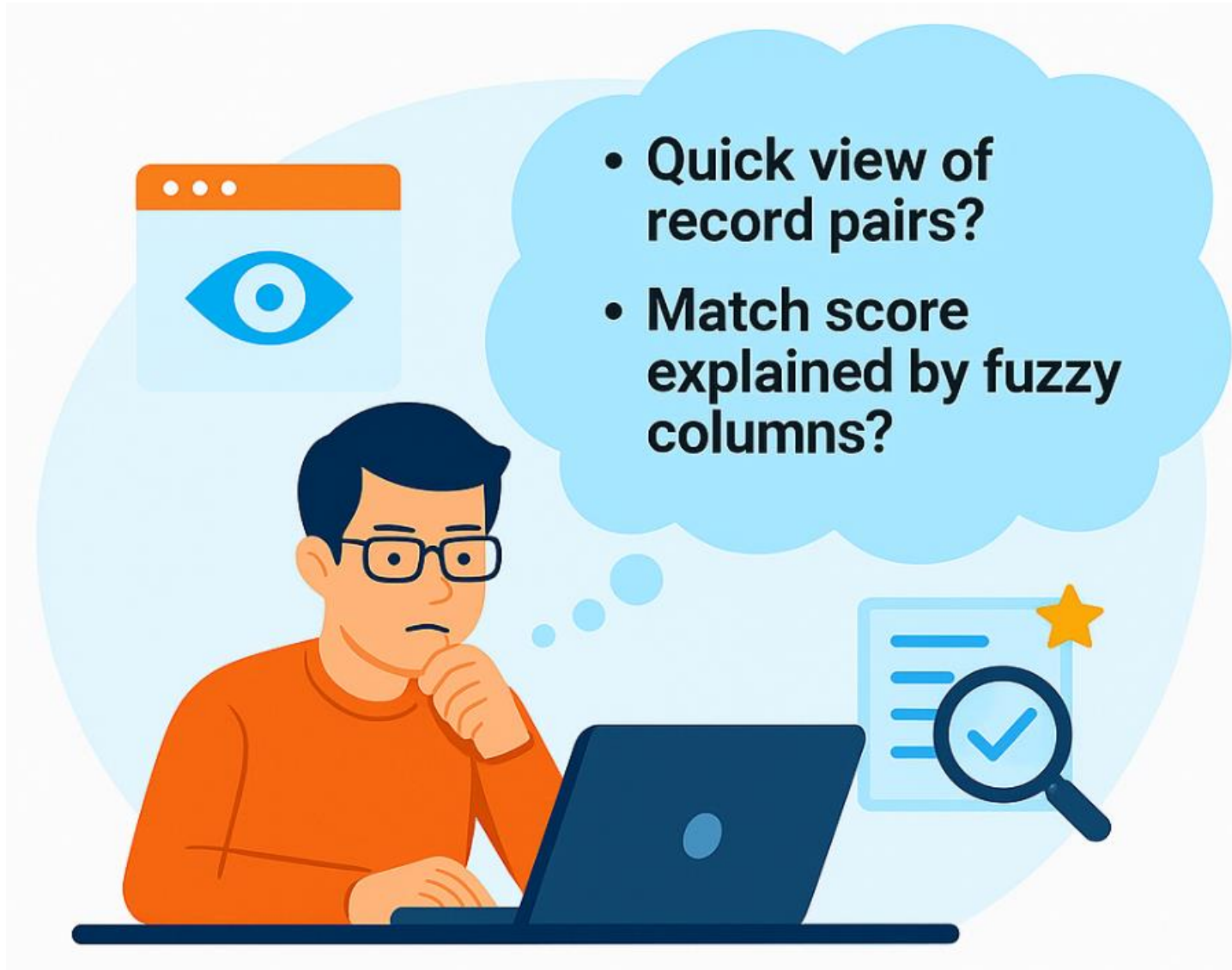
Is there an opportunity to optimize the Match execution time ?



How are my matches distributed ?



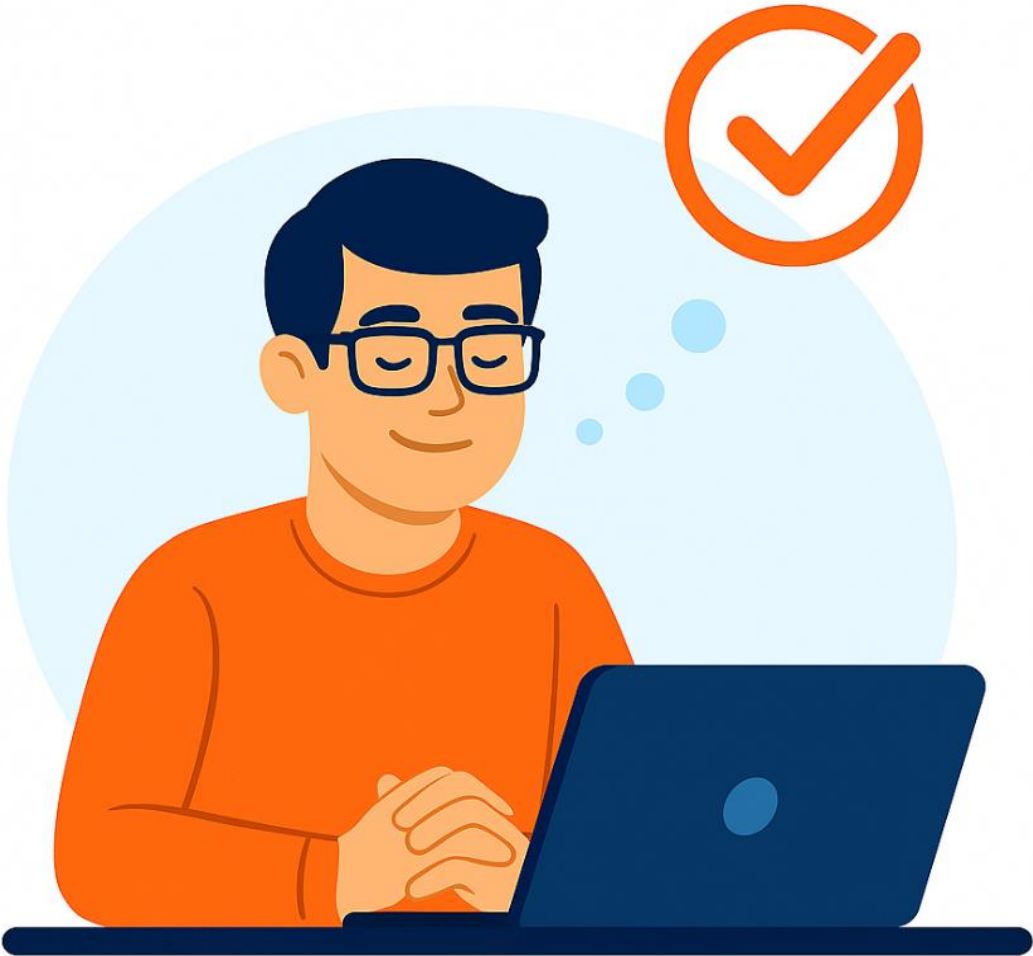
What fields are contributing to the match score ?



Is my match config causing over-matching ?



Desired Results



Upcoming Features in Match Analysis & Explainability Dashboard

Model Tab

Analyze analysis for threshold rules and Adaptive AI matches

Join Tab

Analyze, matching of data from across different source systems

Hotspots Tab

Identify data hotspots that might cause over matching

Clusters Tab

Analyze formation of large clusters of transitively, matching records



Q&A

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Thank You

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