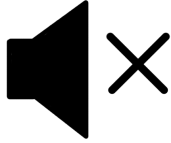


April 17, 2021

Pairing MDM & Data Governance: A Necessary & Complimentary Match

Lisa Morris, Senior Principal, IPS

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 **INFASupport YouTube channel** and **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.

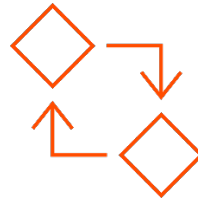
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Bootstrap trial and
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Enriched Customer
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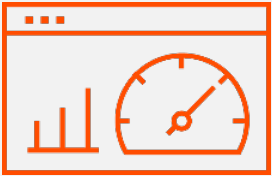


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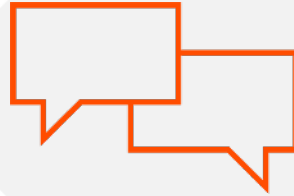
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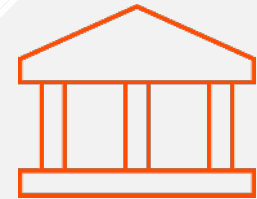
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August 2021

Data Governance for MDM Requirements Discovery

Webinar Series

Lisa Morris, Senior Principal, IPS



Informatica™

Agenda

1

Data Governance paired with Master Data Management

2

MDM Requirements Gathering Overview

3

Which Facets in Data Governance to use for MDM Requirements

4

Take advantage of Data Governance workflows

5

Accelerators Available

6

Demo and Q&A

1 Every MDM project should be paired with Data Governance

- For years we've known that:
 - *“Data Governance is critical to achieving sustainable and effective MDM. Failure to execute Data Governance concurrently with an MDM program greatly decreases the probability of success and economic sustainability of MDM programs.”*

[MDM Institute](#)

2 MDM Requirements Gathering Overview

1. Identify business domains to master and fields based on the MDM 360 data model.
2. Update the out of the box MDM 360 data model
3. Identify source Systems that feed the above defined data to MDM for mastering
4. Identify Data Quality and transformation rules for the defined data
5. Identify Reference Data to use with the business definitions and data quality rules
6. Identify Match rules and Trust Scores
7. Identify Householding and other relationships
8. Identify Systems and Integration techniques for consuming the Mastered records
9. Identify Data Sharing agreements, masking rules, with other privacy policies and security measures that need to be applied as MDM records are consumed

2 C360 Data Model

1. The C360 data model follows the “Party” model, where both Persons and Organizations are considered “Parties”. These parties are distinguished by their Roles.
 - Persons can be Customers/Clients/Members, Employees, Contractors, Volunteers, etc.
 - Organizations can be other Subsidiaries of your Company, Vendors, Suppliers, Regulators, etc.
2. Both Persons and Organizations have fields in common such as:
 - Addresses
 - Phone #s
 - Electronic Addresses
 - Tax information, Etc.
3. Persons have First Names, Last Names and Middle Names
 - whereas Organizations just have business names such as Incorporation Names, DBA Names, etc.
4. Persons and Organizations have relationships with each other
 - Person to Person relationships (ie: Household members)
 - Organization to Organization relationships (ie: B2B relationships)
 - Organization to Person relationships (ie: B2C relationships such as customers, members, employees, etc.)

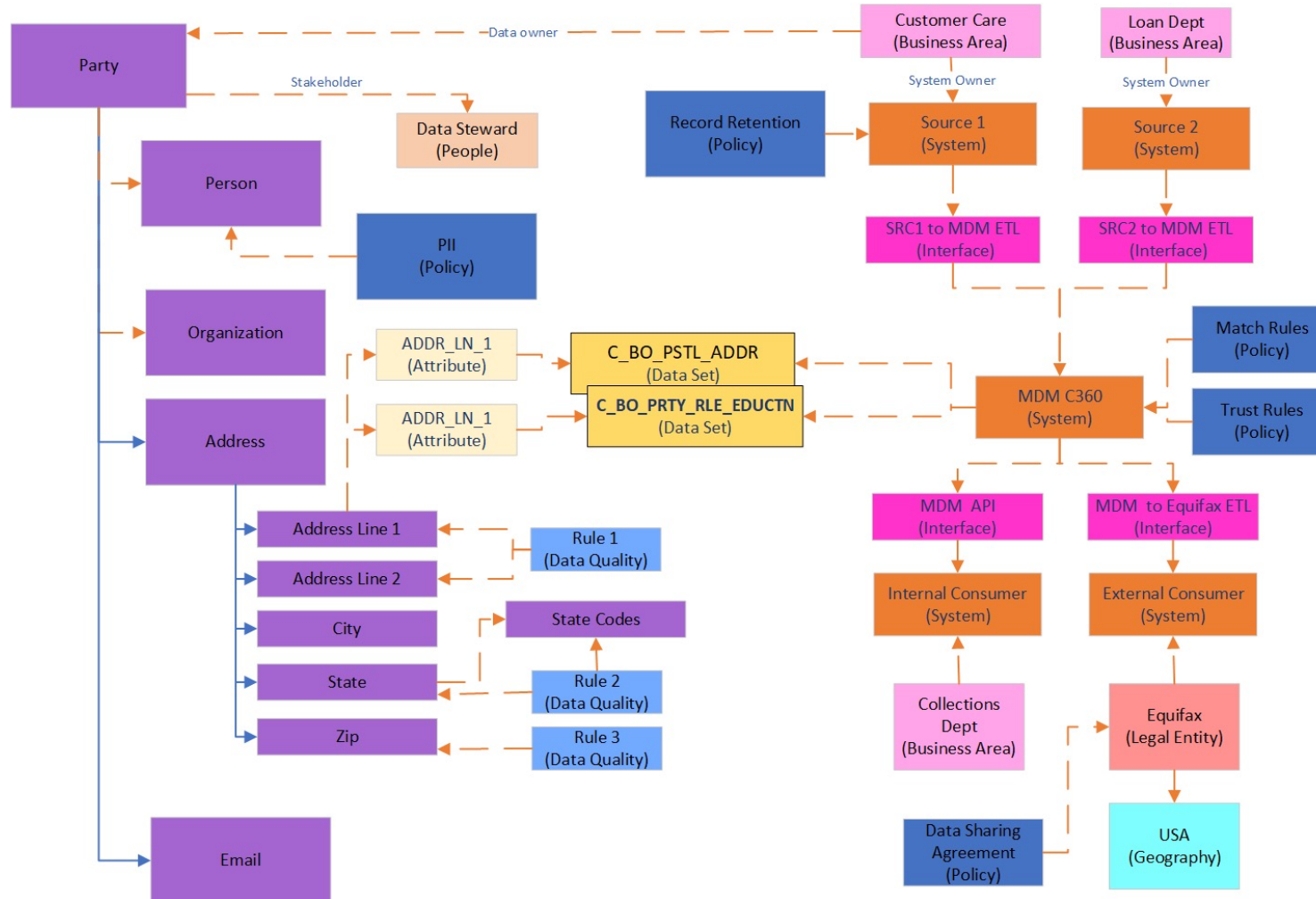


3 Which Facets to Use in Data Governance to Document MDM Requirements

- **Glossary** – Business Definitions of Data Domains, Fields and Reference Data
- **Data Sets** – Collection of data such as Tables, Reports, Files, etc.
- **Attributes** – Table/Report column names (ie: MDM Data Model)
- **Data Quality** – Quality and Transformation Rules
- **Systems** – Source Systems and Consuming Systems
- **Interfaces** – Integration patterns for moving data from source systems to MDM and mastered records from MDM to consuming systems
- **Policies** – Match Rules, Trust Scores, Data Sharing Agreements, Privacy tags, etc.
- **Business Areas** – internal departments that own systems, data, policies
- **Legal Entities** – external 3rd parties data is obtained from or shared with
- **Geography** – location of the external 3rd parties or where data at rest lives.

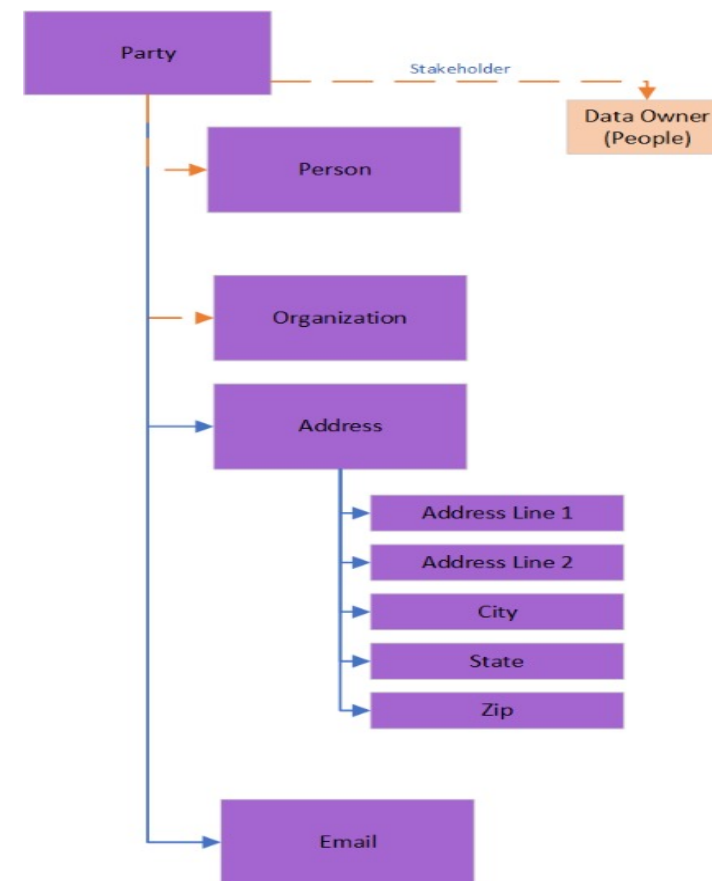
3 Which Facets to Use in Data Governance to Document MDM Requirements

- These facets are related to each other to create a comprehensive picture of your Master Data and the things that support and influence it.



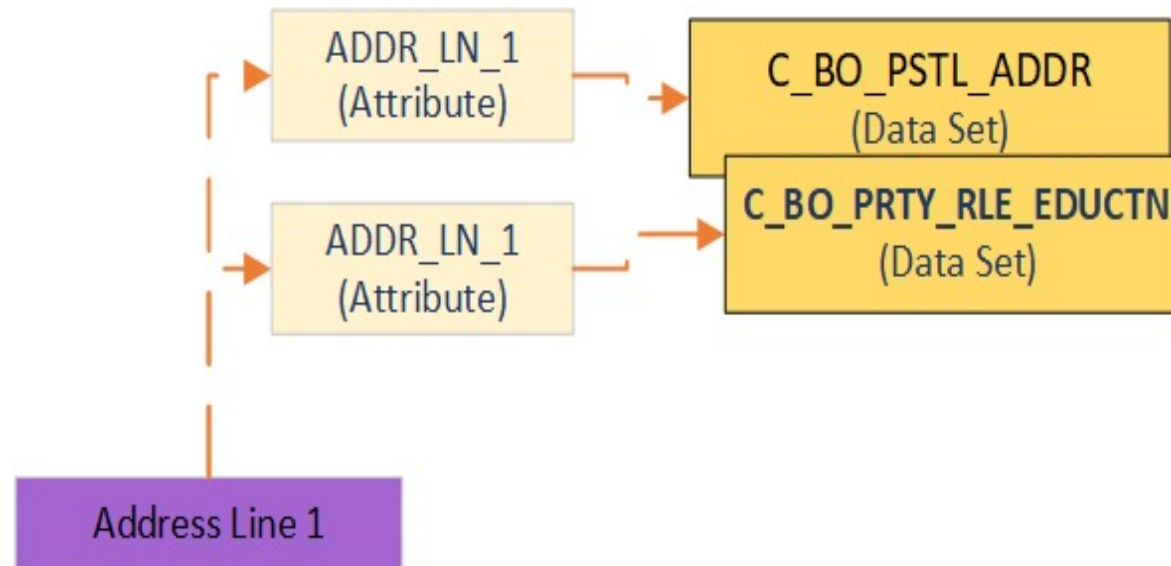
3 Step 1: Identify business domains to master and fields based on the MDM 360 data model.

- Document additions and subtractions from the out of the box C360 data model.
- **Best Practice:** Use the Axon Glossary definitions along with the Glossary workflow mechanism to socialize those domains/fields with stakeholders and capture comments, agreement, disagreement, approval in Axon. This allows you to refer back to this documentation as definitions are challenged, revisited and changed over time.
- **Benefit:** No more searching thru emails, meeting minutes, spreadsheets, etc. to find historical revisions to the definitions and approved definitions.



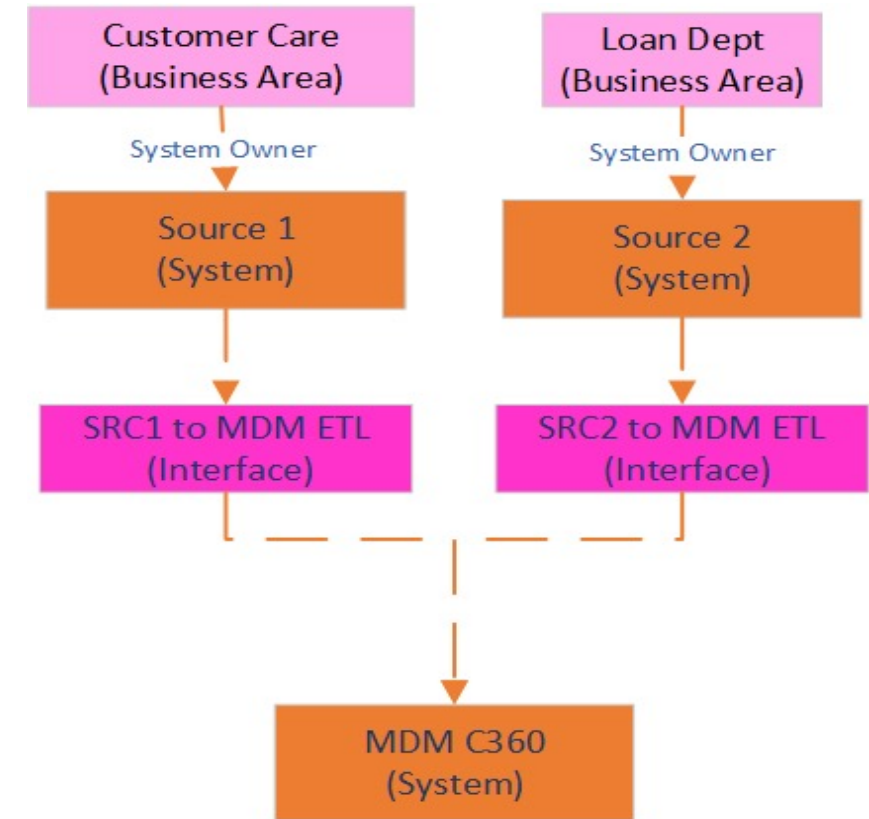
3 Step 2: Update the out of the box MDM 360 data model

- **Best Practice:** Use the Axon Data Set and Attribute facets to mark which Data Sets and attributes are Approved and which are not used (Obsolete)
- **Benefit:** History of approvals and deletions are documented.



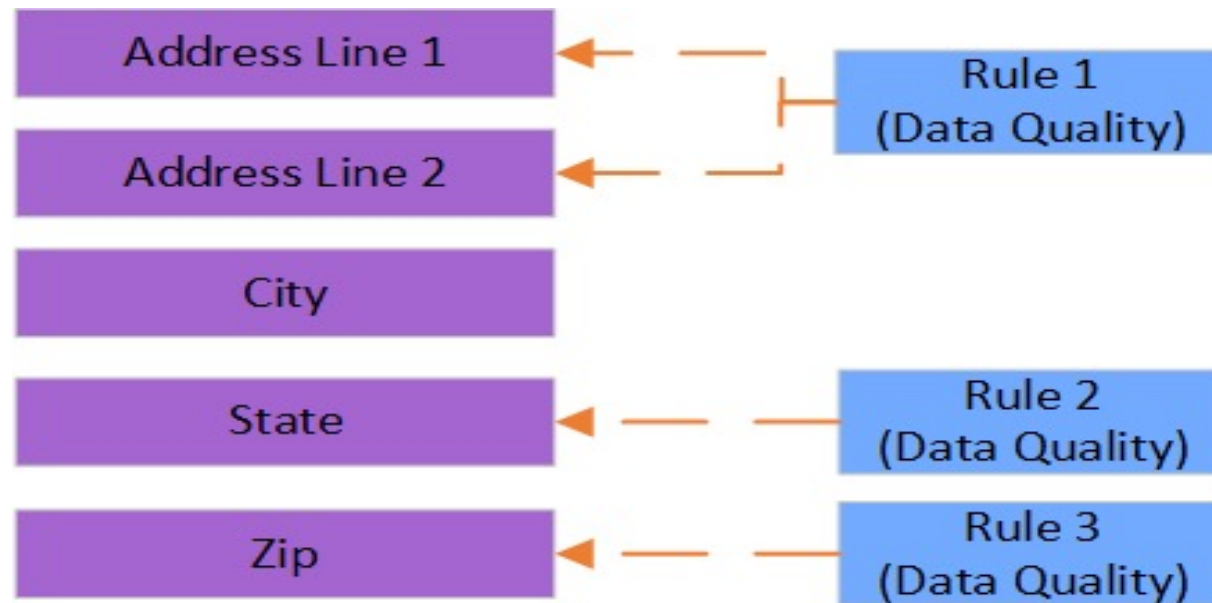
3 Step 3: Identify source Systems that feed MDM for mastering

- **Best Practice:** Use the Axon System and Interface facets to show data moving from source systems to staging areas to the MDM repository. Use the Axon workflow mechanism to approve the Systems and Interfaces as well.
- **Benefit:** Axon graphically shows the lineage of the data. History of approvals is documented.



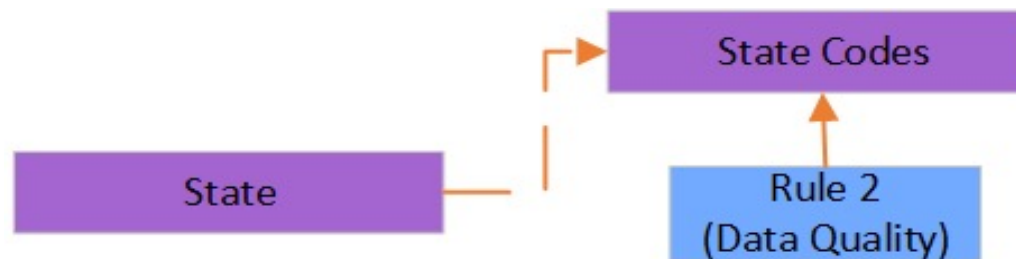
3 Step 4: Identify Data Quality and Transformation rules

- **Best Practice:** Use the Axon Data Quality facet to capture the business rules, then transform those rules into technical Data Quality rules via the Axon to IDQ integration.
- **Benefits:** Semi-automation of rule generation starts from the business perspective



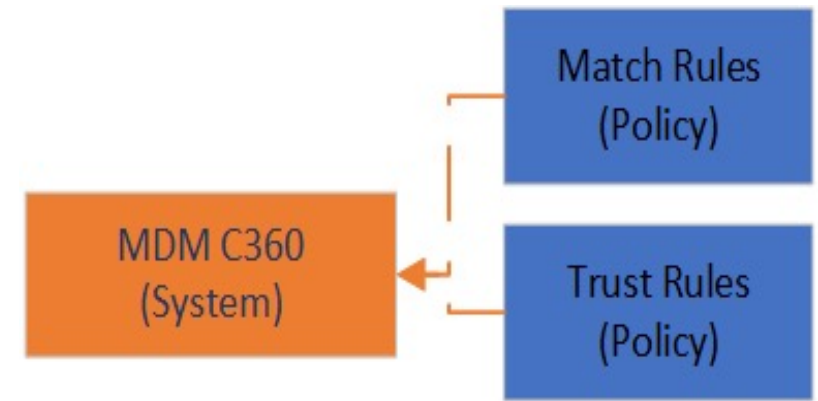
3 Step 5: Identify Reference Data to use with the business definitions and data quality rules

- **Best Practice:** Use a separate Reference Data hierarchy in the Axon Glossary facet to establish examples of each type of reference data. Only put a sample of values in Axon as the actual operational values are held in Data Quality tables (or Reference 360 if available)
 - Link the Reference data to the business definitions using a Glossary to Glossary relationships.
- **Benefits:** Reference data is available at your fingertips as you review the main business definitions and data quality rules.



3 Step 6: Identify Match rules and Trust Scores

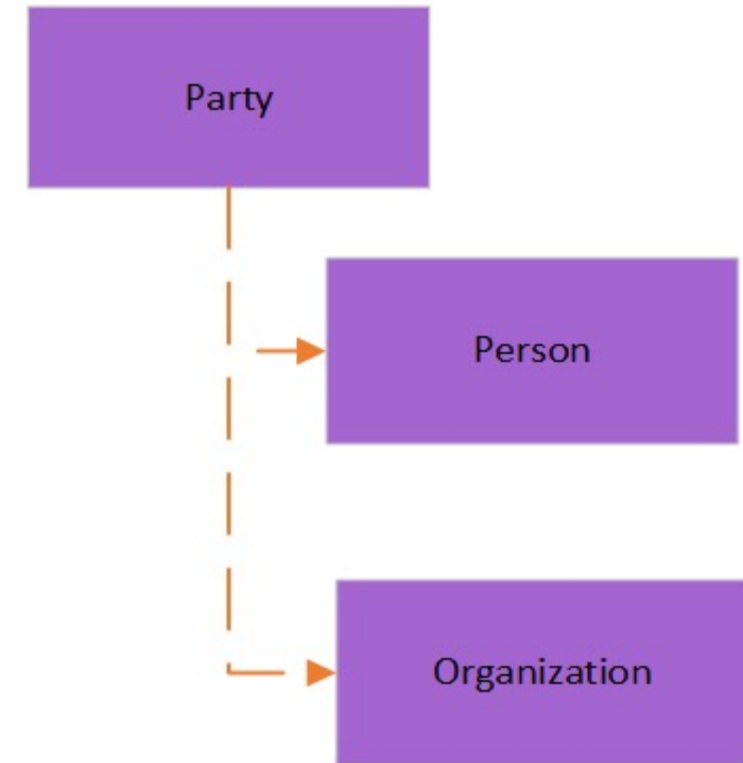
- **Best Practice:** Use the Axon Policy facet to document and agree on what fields are used to match on, and what sources have precedence over others for trust scores.
 - Use the Axon workflow mechanism for Policy to gain approval from stakeholders.
- **Benefits:** Rules are captured in same place as rest of requirements and are tied to the Glossary items (fields) used in the rules for traceability/impact analysis if Glossary items change.



3

Step 7: Identify Householding and other relationships

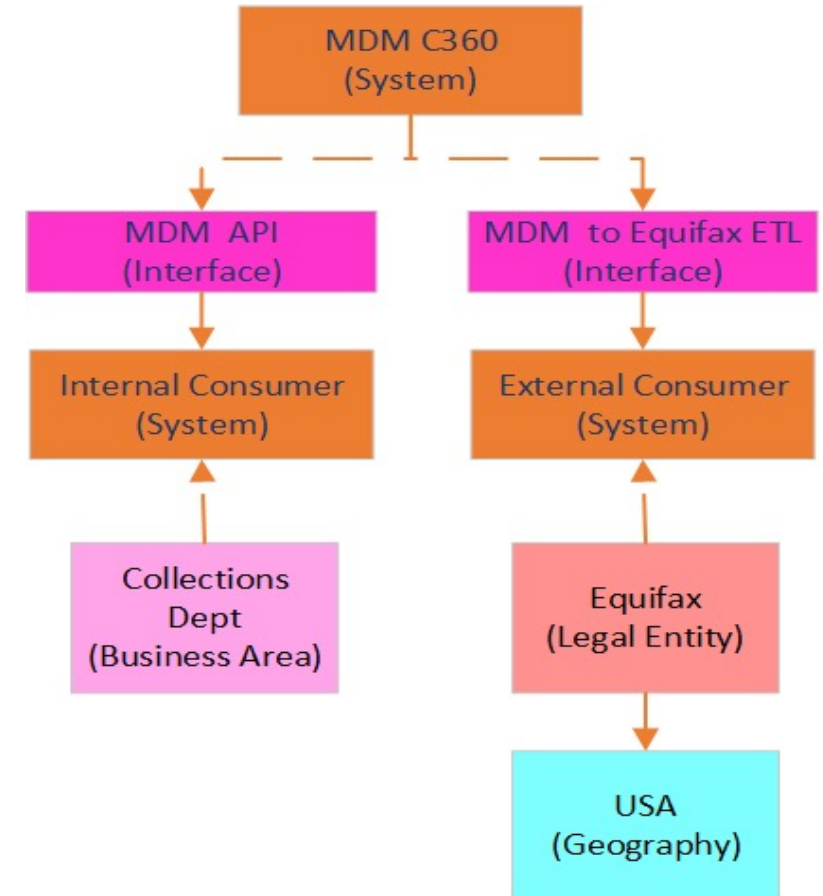
- **Best Practice:** Use Axon Glossary to Glossary relationships to tie Persons to Organizations, Persons to other Persons (ie: sons, daughters, parents, grandparents, etc. and professional relationships such as financial consultants to investors, etc.)
- **Benefit:** Allows the business to work out the relationships and gain approval from stakeholders before implementing relationship rules in MDM



3

Step 8: Identify Systems and Integration techniques for consuming the Mastered records

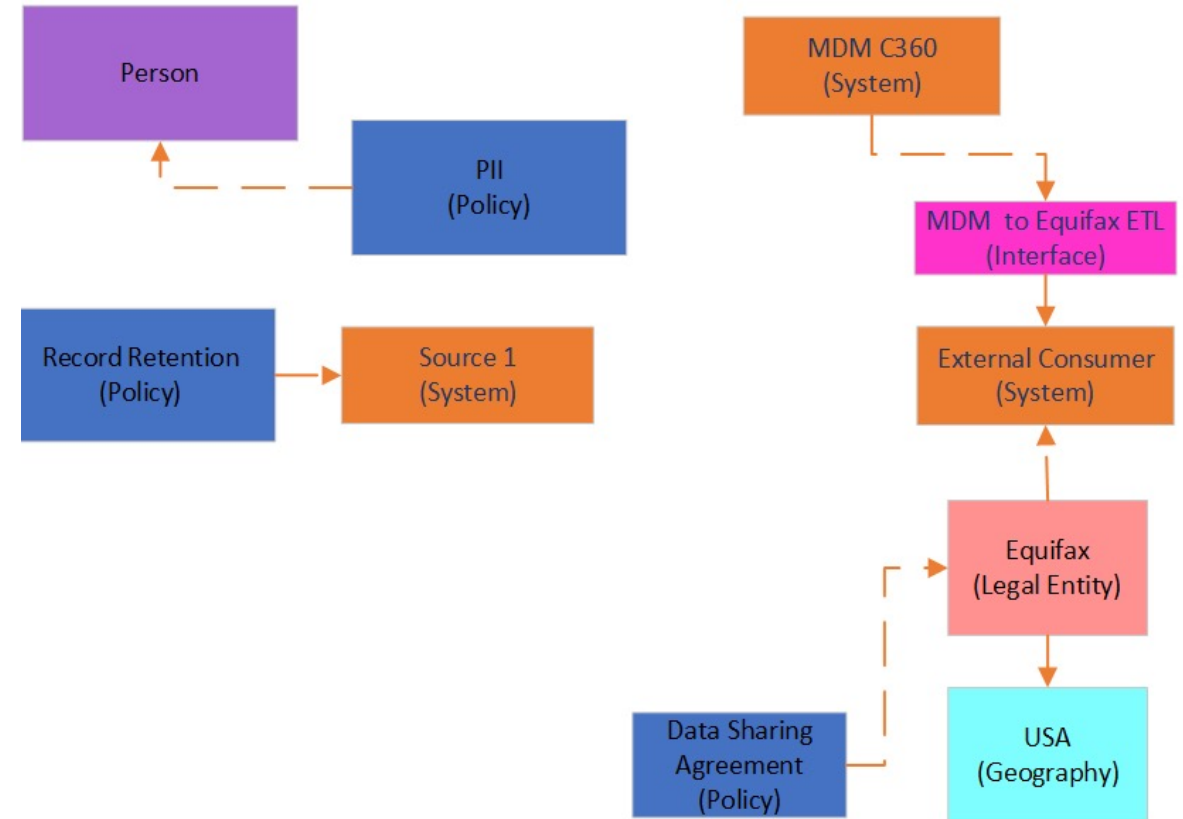
- **Best Practice:** Use the Axon Systems and Interface facets to capture how golden records will flow to other operational systems, analytics and reporting repositories, data lakes, etc. to be paired up with transactional records for consumption.
- **Benefit:** Axon graphically shows the lineage of the data. History of approvals is documented. Data Quality scorecards can be overlaid showing quality of data going to consuming systems/repositories.



3

Step 9: Identify Data Sharing agreements, masking rules, with other privacy policies and security measures that need to be applied as MDM records are consumed

- Best Practice:** Use the Axon Policy facet to relate the policies to the Glossary (fields), Systems and Interfaces that need to transform the mastered data for consumption.
- Benefits:** Assists with Data Privacy by Design principles and can be used by integration tools to transform the mastered data for consumption in accordance with Data Privacy & Security Regulations.



4

Additional Best Practices:

Take advantage of Data Governance Workflows

Use default or custom workflows for each facet as you document the MDM Requirements to:

1. Route proposed additions, changes, deletions to the stakeholders involved to gain approval for the:
 - data domains (Glossary),
 - source Systems,
 - Interfaces used to consume the mastered data,
 - Policies,
 - Data Quality Rules,
 - Relationships,
 - etc.
2. Each workflow process documents each stakeholder's comments, approvals, rejections and time stamps each step in the process for future reference and audit purposes.

5 Axon Accelerators available

The C360 MDM data model is available as Data Governance bulk upload spreadsheets to accelerate your adoption of the Data Governance tools.

- Glossary Definitions
- Glossary x Glossary Relationships
- Data Sets for each table in the MDM model
- Attributes for each table in the MDM model
- 1 System to represent the MDM System itself

Data Governance for MDM Requirements Discovery Q&A

Thank You