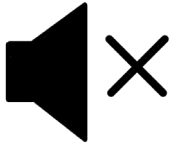# Use cases for MDM SaaS & Data Quality

Sourya Dass, Senior Solutions Architect

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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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Feature Rich Success Portal
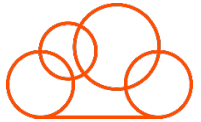
Bootstrap trial and POC Customers

Enriched Customer Onboarding experience

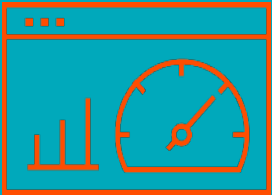Product Learning Paths and Weekly Expert Sessions

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Tailored training and content recommendations

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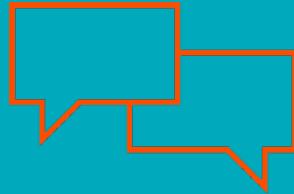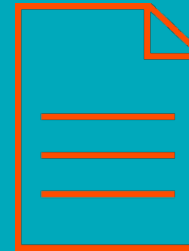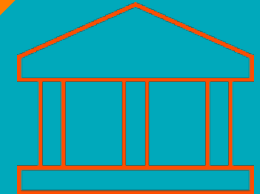
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Use Cases for building a good project

We will discuss use cases and requirements for each phase of the technical landscape that contribute to the success of the project and will help in delivering business benefits. This presentation will help understanding how to document business & technical requirements, build product adoption and guide on the logical phases of a MDM SaaS & Data Quality project implementation.

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Addressing Fragmentation and Complexity

❑ While there's no shortage of data in organizations, connecting data from multiple areas of the business to gain visibility into what is impacting business performance remains a challenge. Digitalization has accelerated the pace of business and investments in new cloud applications, many driven at the departmental level with little to no IT involvement. And although speed and agility are mandates for digital business, they create silos of data that are inconsistent, and varying in their levels of completeness and accuracy.

❑ MDM SaaS helps you ensure standard definitions and formats for customers, materials, products, suppliers, cost centers, and other domains of master data, which improves the efficiency of processes that span multiple applications. MDM SaaS also helps you create cross-domain knowledge graphs that improve decision making through greater context of the relationships within your data and applications.

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Key ROI & Outcomes for use cases determination

Improve customer retention, loyalty, and profitability

Optimize supply chain resiliency, flexibility, and continuity

Increase product conversion rates, basket size, and profitability

Accelerate financial consolidation and reporting

Define Business & Technical concepts

Gain greater accuracy from forecasting, planning, and analysis

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Best practices & Recommendations

Vision & Strategy for business & technical use cases – Project Stakeholders

Define Success Criteria for ROI

Identify Current Challenges that need to be solved with MDM SaaS

Budgeting & Cost

Design phases & iterations of each deployment with timelines

Procure and set up environments

Invite PDOs, Data Governors, Architects, Developers to Governance Council meetings

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Logical Steps to MDM SaaS Implementation

Data Governance Councils

Finalization of source systems

Finalization of Lookup Code values

Finalization of Business attributes

Define Business & Technical concepts

Finalize MDM Data Model

Profile Data Quality

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Logical Steps to MDM SaaS Implementation

Finalize MDM use cases based on requirements and business feedback & inputs

Design conceptual Match Rules in MDM

Design Ingress & Egress mechanism

Finalize Data Quality rules based on use cases

Design MDM UI

Finalize User Roles & Privileges

Start test data load in Development environment

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Drilling down to the technical details

CDQ use cases

- Business rules
- Technical validations
- Exception report
- Data corrections

CDI use cases

- Source to Target mappings
- Data transformations
- DnB, Address Doctor integration

MDM use cases

- Data Load Strategy
- Match rules
- Survivorship
- Hierarchy
- UI

Downstream data syndication

- API (real time)
- Message Queue (near real time)
- Batch driven
- Publish format

Reporting & Analytics requirements

- Target system
- Schedule
- Giving access to teams

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Typical MDM SaaS Use Cases

- ❑ Establish MDM for B2B & B2C records
  - ❑ Identify the right C360 Data Model by reviewing the out of the box model and doing a fit gap analysis
- ❑ Ability for Data Stewards to Create, Update and View Party data
  - ❑ Implement roles and privileges
- ❑ Integrate C360 SaaS with legacy data sources
  - ❑ Construct ingress jobs and data pipeline to build rules and transformation layer for ingestion in MDM
- ❑ Designing business & technical rules
  - ❑ Profiling of data sources to understand quality
  - ❑ Work with data governance council to gather business inputs on data validation
- ❑ Implement Match Model in MDM SaaS
  - ❑ Create match rules and survivorship rules in MDM as per business use cases
  - ❑ Test match iterations to create the golden copy
- ❑ Publish data for analytics, reporting
  - ❑ Design outbound layer for syndicating data to Snowflake/Data Lake for consumption from MDM. Build reporting on MDM golden data.

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Document MDM SaaS Use Cases

Objective Name	Business Goal	Technical Goal
Establish MDM for Personnel	ABC Corp. should be able to manage Personnel data in C360 SaaS	Establish the Personnel Domain.

Milestone Name	Business / Technical	Description
Identify the right C360 Data Model	Technical	Review OOB Data Model and establish the right BE for ABC Corp.
Ability for Data Stewards to Create, Update and View Personnel domain	Business	Implement the C360 UI with various roles and privileges to manage Personnel data

Objective Name	Business Goal	Technical Goal
Integrate C360 SaaS with source in ABC Corp.	Establish Golden Personnel data across the source	Implement Match Merge in C360 SaaS

Milestone Name	Business / Technical	Description
Integrate C360 SaaS with the source in ABC Corp.	Business	Create Ingress jobs to integrate source into C360 SaaS
Implement Match Model in C360 SaaS	Technical	Create a Match model appropriate for ABC Corp. use cases
Implement DG workflows to manage data	Business	Enable AVOS workflows for approval processes

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Data Quality use case challenges

The challenge for all data quality champions is that data doesn't live in just one system or function. The pain caused by data quality problems is dispersed across the entire organization. And the opportunities created by high-quality data are, too. Since there's often no single owner of data quality initiatives, there's often no common approach to data quality across the enterprise. A critical step in developing a data quality culture that accelerates data-driven digital transformation is to show all stakeholders the money: to aggregate the dividends—the hard business benefits—that accrue when you improve data quality across the enterprise. To succeed, you need to get data quality improvement on the radar of key business executives by talking their language, using their metrics, and showing value in their terms.

1. **New revenue Data quality** isn't just about cutting costs. It's the fuel for transformative new business initiatives such as better customer experiences, increased cross-sell and upsell, improved products and services that drive increased sales, new innovations that open new markets, and decisive insights that are put into action faster.

2. **Compliance Data quality** also improves the way you handle regulatory compliance, whether it's about customer data regulations, healthcare recordkeeping, or anti-money laundering reporting.

3. **Cost savings Data quality** drives increased productivity, measurable time savings, and streamlined and accelerated processes that drive down costs.

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Data Quality Tips & Recommendations

For marketing : look at the big, strategic metrics like Marketing Qualified Leads and Marketing-Generated Pipeline down to granular metrics like click-through rates, engagement indicators, and conversion metrics.

For sales : focus on the number of qualified opportunities, win rates, upsell and cross-sell, retention, and customer success

Work closely with your sales and marketing leaders to understand the data sources most critical to their success and the metrics that keep them awake at night. Then run a data quality scorecard - a simple dashboard showing the state of your data quality against their primary sources to show them how much room there is to improve. Typical metrics for these dashboards include data completeness, uniqueness and freshness. **Finally**, connect the improvements to actual business outcomes measured in dollars.

Only personalize based on dimensions where your customer data quality is strong. If the database fields for a certain dimension (for instance Age or Purchase Frequency) are incomplete or don't comply with expected values (such as letters instead of numbers in the Age field), don't use that dimension to drive personalization. Use data quality tools to fix the problem first.

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Data Quality Tips & Recommendations

Personalization is important, but without great contact data your customers are never going to see your personalized messages. Investigate contact data verification tools to ensure your personalized mail, email and phone communications are using clean, trusted data.

Salespeople live in their CRM dashboards. Ask a sales leader to give you a tour of theirs. See what metrics they're tracking and run a data quality audit of the underlying CRM data.

❑ Standardize key definitions (Customer, Opportunity, etc.) before running sales analytics.

❑ Use data profiling tools to help identify risk to the pipeline (for example, multiple opportunities with the same company).

❑ Don't depend on your sales team to keep the data current and accurate. You need to have a plan to do that. You need to have a plan to do that without pulling them away from what they are paid to do grow the business.

❑ Embed data quality capabilities right inside your CRM platform, like Salesforce, to catch bad data before it enters your systems.

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Data Quality Tips & Recommendations

For compliance, data lineage is key. Use your master data management tool to see all data dependencies, relationships, and movements. Make sure that you have metadata visibility into all your data sources, transformations, and uses. Be regulation specific. Capture and report on the data quality metrics and activities that drive compliance for each regulation. You can even create regulation-specific rule sets into your data quality solution.

❑ Ensure you have an audit trail. Your data management platform should show when data has been accessed, moved, or transformed, where and by whom.

❑ Employ an enterprise data catalog to discover, curate, manage, and prioritize the data that should be migrated (and retire/ archive the data that shouldn't in line with your data retention policies and regulations).

❑ Get your metadata right before you migrate, using a metadata repository with a business glossary. This gives business meaning and context to the data, and makes the cloud data discoverable, usable, and self-service friendly.

❑ Make sure your data management platform includes strong metadata management and is accelerated by AI/machine learning. This will enable you to increase productivity with intelligent recommendations and automation of many time-consuming data management and stewardship tasks.

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Data Quality Tips & Recommendations

❑ Make it strategic - Because data is everywhere, data quality is best thought of as a strategic initiative, not just a project team issue. It's important to make it someone's job: the new Chief Data Officer is often the chief data quality evangelist and strategist. Start with the CEO's business priorities and explicitly link your data quality efforts directly to them.

❑ Think enterprise wide - Because data quality issues are so similar everywhere, you need repeatable data quality processes and technologies. Take a centralized approach and track data quality enterprise-wide with dashboards, scorecards, and visualizations. Make sure to take an approach that embraces on-premises, cloud, and big data anywhere

❑ Emphasize data governance - Data quality is a key part of a wider data governance foundation framework. This framework is critical for regulatory compliance, of course, but it is also central to providing the trusted data the new business insights and business processes will run on. Good governance lets you create, maintain and enforce data quality policies for data in motion, at rest, and during creation and use. Make sure that you can grow from a data governance project to full-blown enterprise data governance with minimal disruption to your environment.

❑ Integrate data quality into your data fabric - Embed it in teams, put data stewards inside key lines of business, and build it in to processes. Data quality is useful as a fix, but it's best when proactively integrated into processes and applications to prevent bad data from entering your ecosystem.

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