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9 March 2022

Architect Workshop

Master Data Management - Fueling the Business or a Burden to IT?

Housekeeping

- This session will be recorded
- Please feel free to ask any question via the Q&A option (not via chat) – they will be answered asap, some questions may be taken at the end of the session
- Please interact with us via the poll questions asked during the presentation
- End time is 16:30 CET

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Agenda

1. Business drivers for MDM
2. Architectural principles and design patterns
3. Customer case
4. Q&A

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Business drivers for MDM

Marielle Verschoor

MDM Solution Architect – EMEA/LatAm

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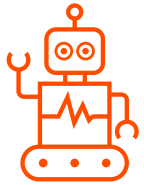
Business Drivers for Master Data Management

Customer Experience

Governance & Compliance

Operational Efficiency



Digital Transformation

Advanced Analytics

Mergers & Acquisitions

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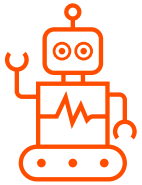
Many business initiatives include migrations

Customer Experience

Operational Efficiency

- Migration to Salesforce
- Migration to Cloud
- ERP consolidation
- HR Consolidation to Workday
- Migration to more realtime ecosystem
- Migration to S4 Hana
- …



Digital Transformation

Mergers & Acquisitions

69% of organizations are migrating business critical applications to the cloud*

64% of organizations are planning or in the middle of an ERP cloud migration project*

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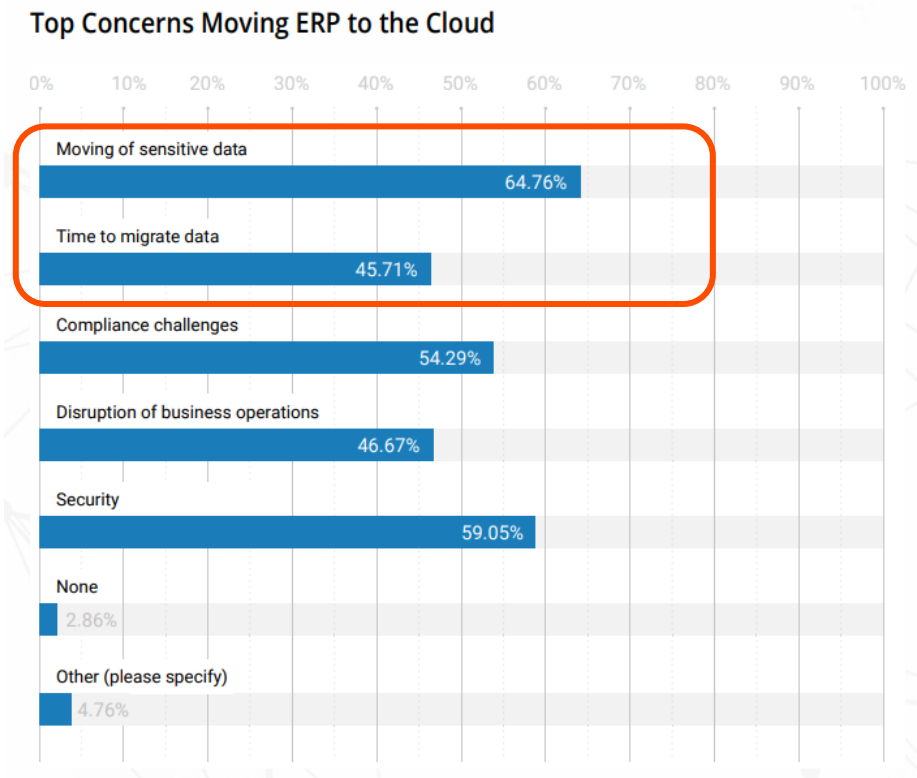
*Source : CSA, The impact of cloud on ERP

Data determines success of migrations

- Data accuracy defines success and acceptance of the new system
  - 90% of CIOs reported data migration projects falling short due to cloud on-prem complexity#
- Data issues cause budget & timeline overruns; 38% of projects are over budget and 47% over time*
  - 13% of budget overruns caused by data issues*
  - 19% of timeline overruns caused by data issues*
- Prevent duplicate & inaccurate data



*Source : Panorama consulting, 2020 ERP Report https://cdn2.hubspot.net/hubfs/4439340/Panorama-Consulting-Group-2020-ERP-Report.pdf

#Source : CSA, The impact of cloud on ERP

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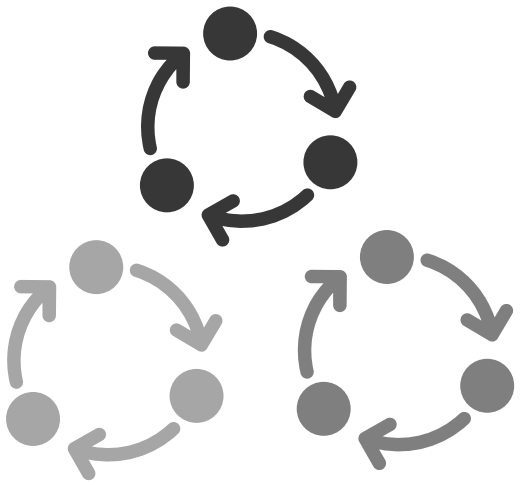
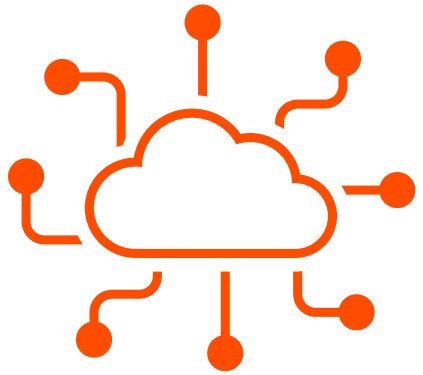
High level migration scenario

OLD



Processes
Data

NEW



Data quality issues

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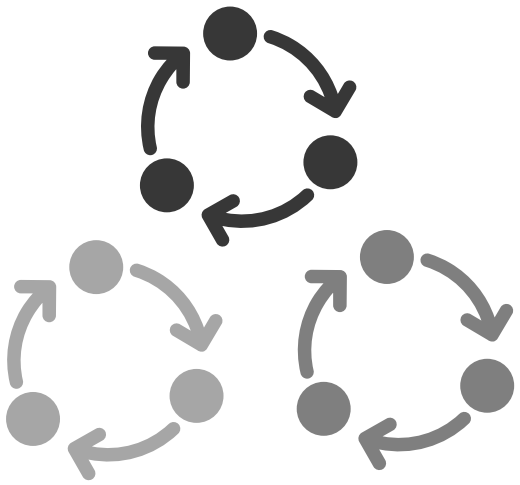
In fact - high level migration scenario

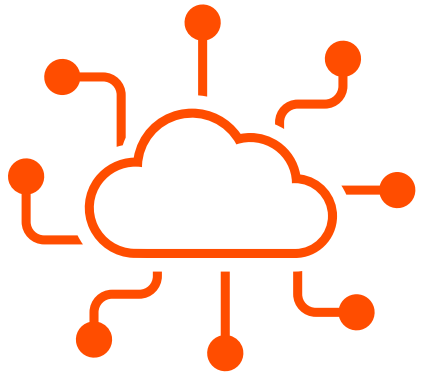
OLD



Processes

Data

NEW



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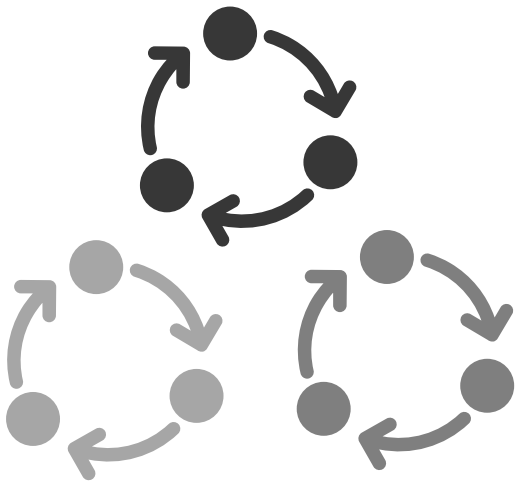
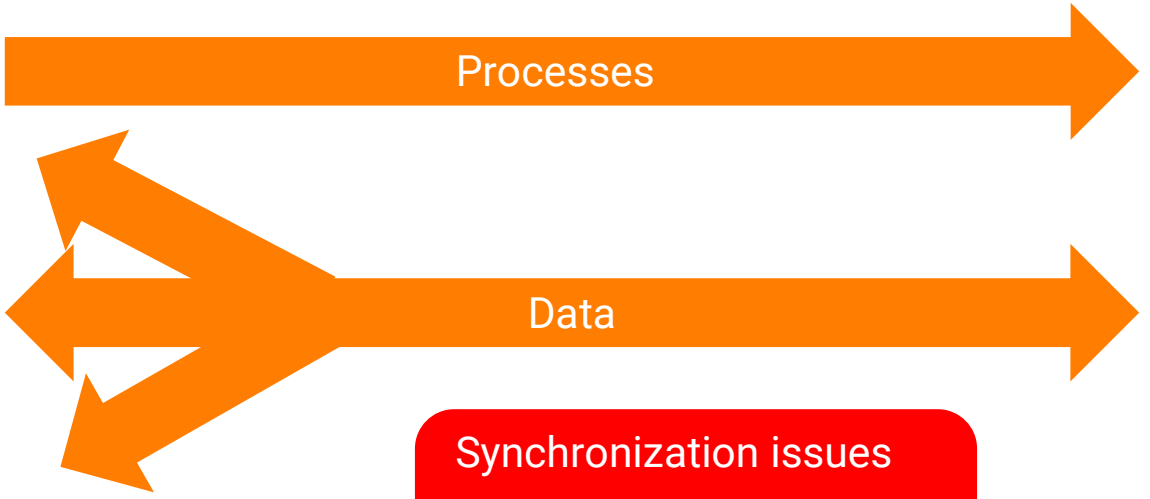
In fact - high level migration scenario

OLD





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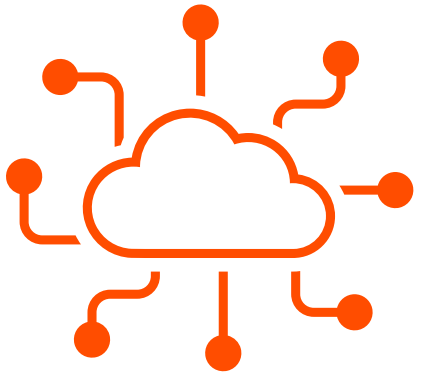

Synchronization issues
Duplication issues
Integration effort

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Migration considerations

Process migration considerations

- More systems to be consolidated **increases risk & complexity** of data migration
- Migrations are not a big bang approach; old and new systems **need to run simultaneously**
- To be migrated processes are typically **diverse and spread** across different business entities

Data migration consequences

- Data migration needs to be efficient to **phase out old systems** as soon as possible
- Data of old and new systems needs to be **kept in synch continuously** and system independently
- Data migration needs to be **consistent** across different data domains
- Data from different systems needs to be **checked** for quality, duplicates and merged

Efficient & cost effective

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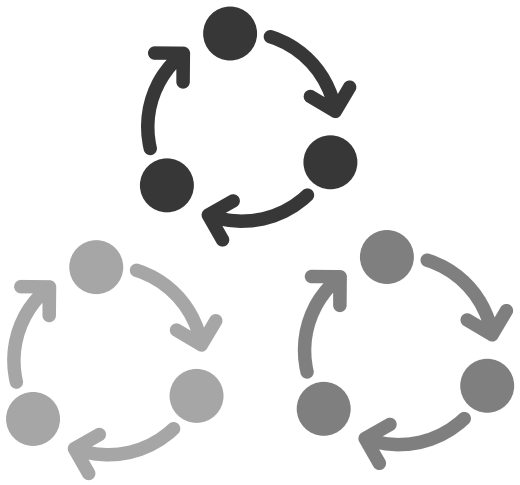
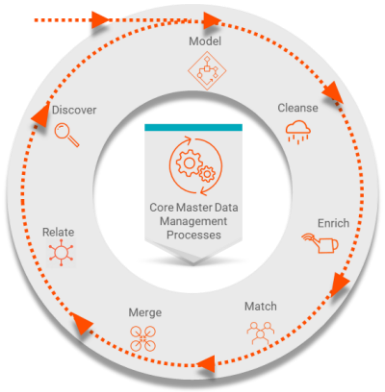
Improved migration scenario

OLD



Processes

Data



Data

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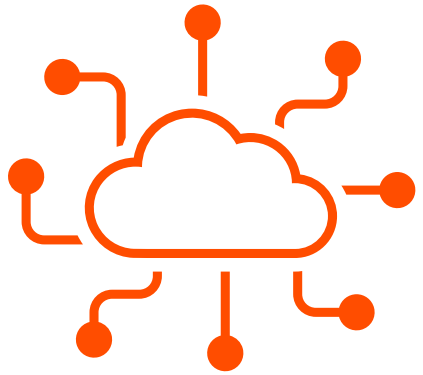

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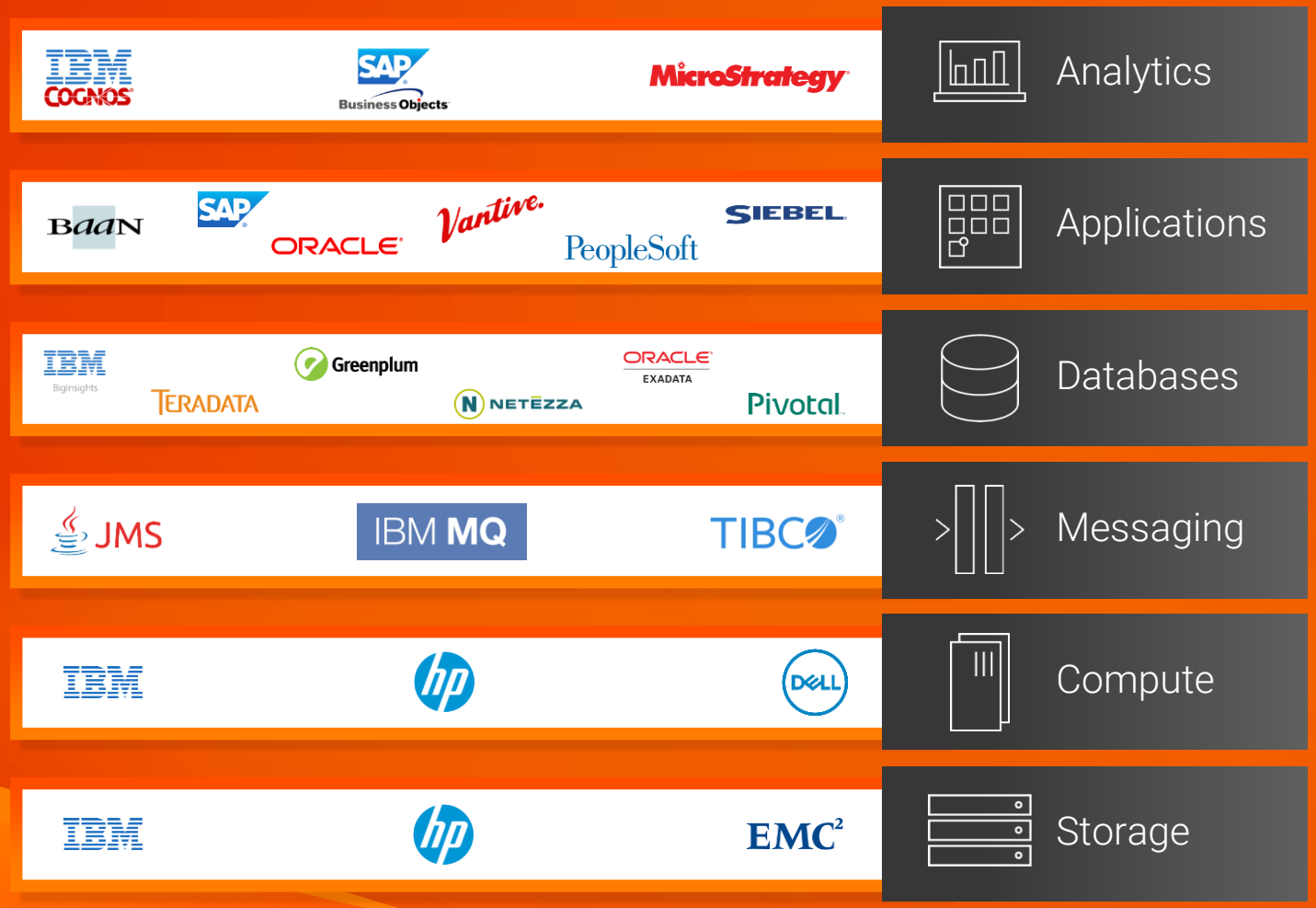
Architecture principles & Design patterns

Barry Wildhagen

MDM Solution Architect – EMEA/LatAm

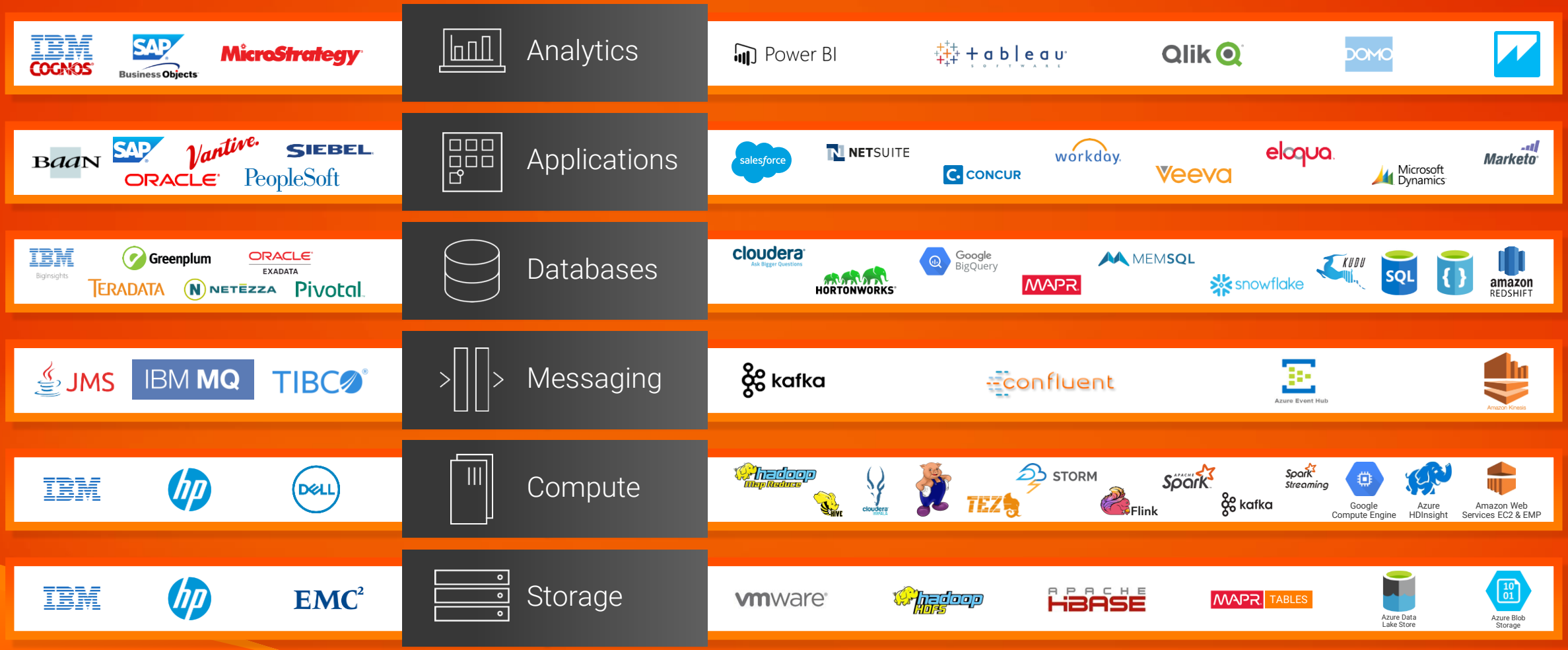
Data for Specific Business Applications

(circa 1960-2000)

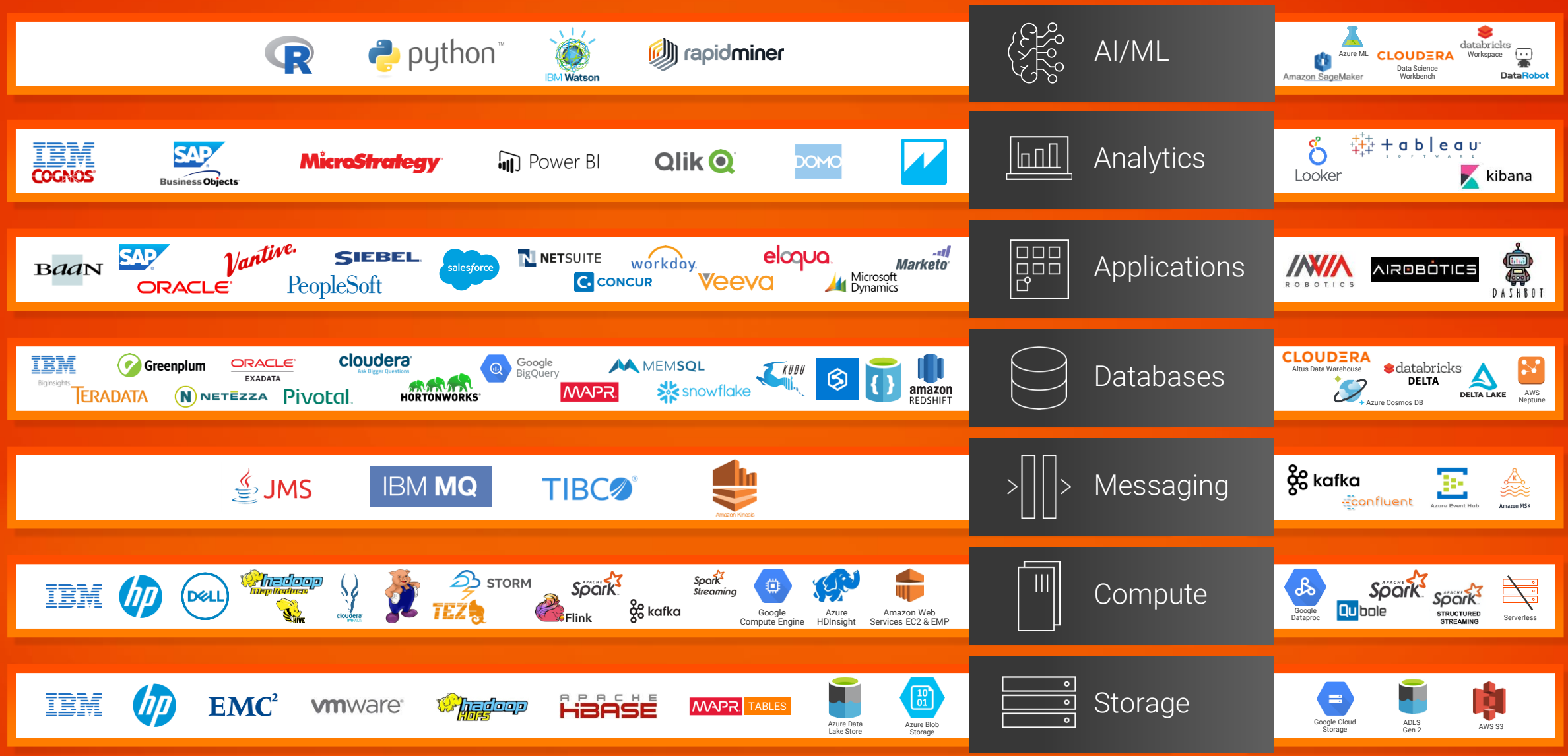


Data for Enterprise-Wide Business Processes

(Last 15-20 Years)



Data Powers Digital Modernization & Transformation



What role does MDM play in migration architecture?

Lower cost, minimize risk, increase speed

1. Pre-migration; **Clean up** dirty data before migration, consolidation or upgrade
2. During migration; **Simplify** migration architecture
3. Post-migration; **Maintain data consistency** across new and old systems
4. Repeat; **Reuse data, mappings and rules** for the next migration project

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What are typical steps for these data migrations?

1. Identify and access
2. Analysis of the source and target system(s)
3. Model the data, definitions and requirements
4. Define cleansing, enrichment, transformation rules
5. Map source to target attributes and crosswalks
6. Test load data into target system
7. Monitor quality and exceptions
8. Migrate data to new system and audit
9. Keep data in sync
10. Decommission source system

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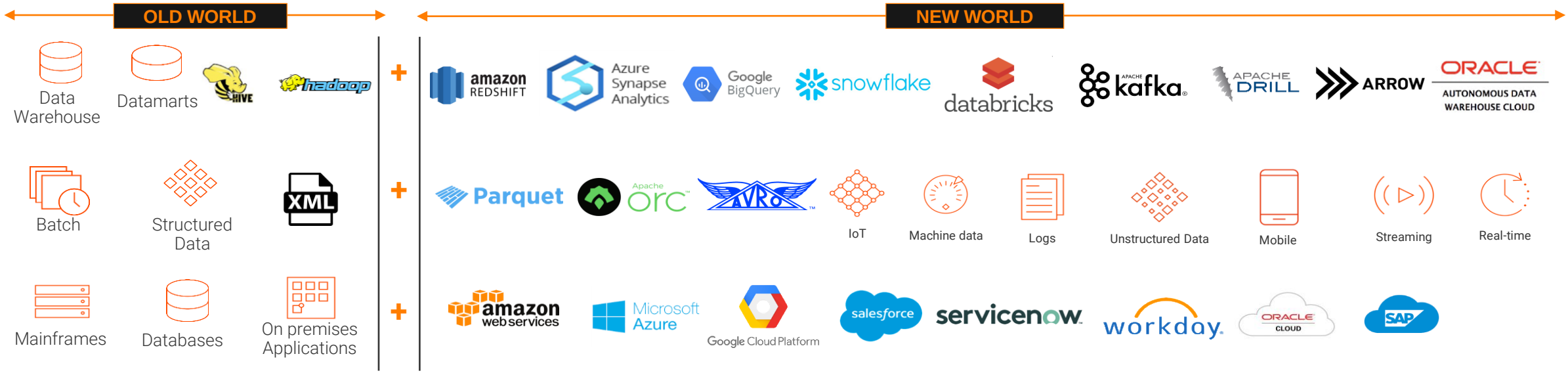
1. Identify and access; connectivity is key



https://www.informatica.com/products/cloud-integration/connectivity/connectors.html#

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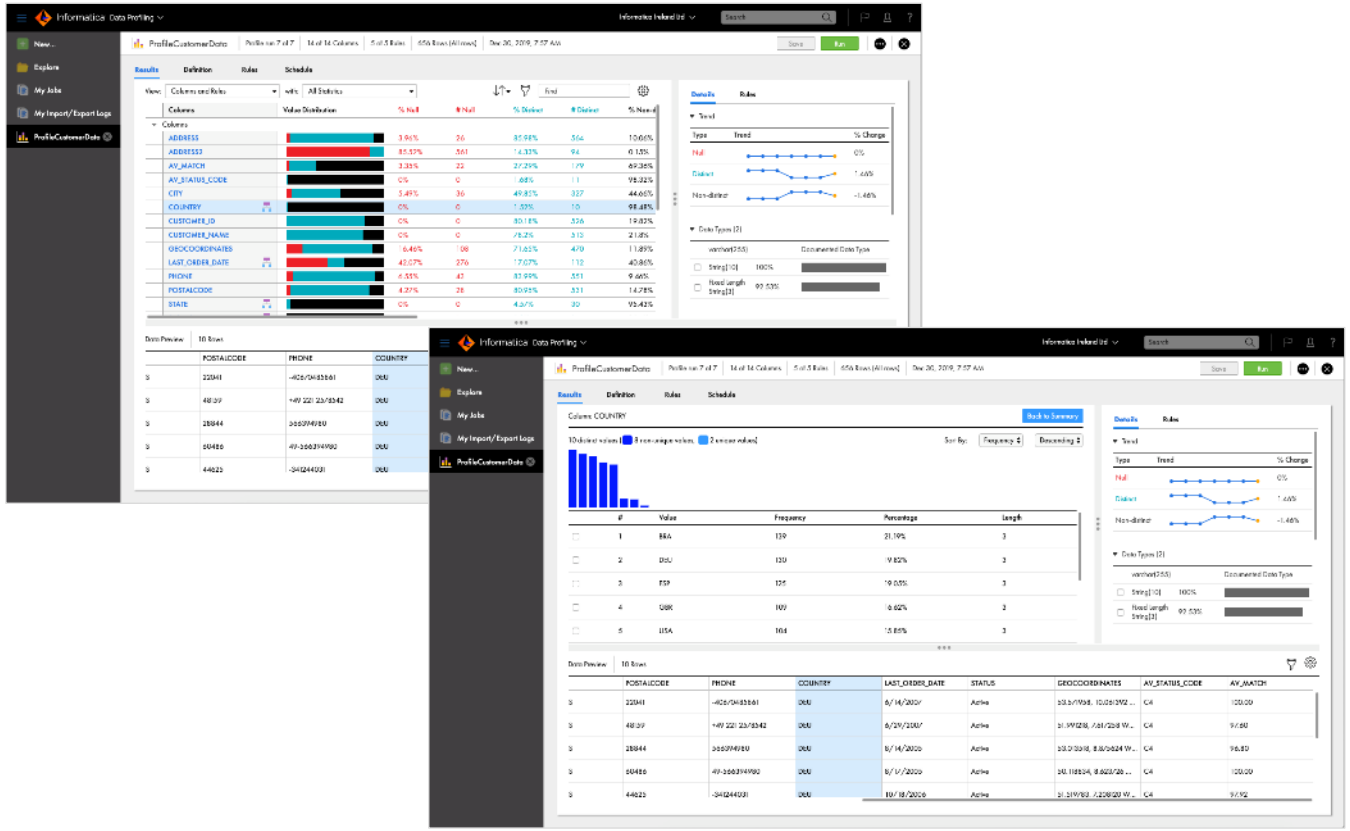
2. Analysis of the source and target system(s); Profile

Profile to examine structure and context

Catalog your data assets for easy discovery

Drill down to see details and filter results

Compare profile runs and identify trends over time



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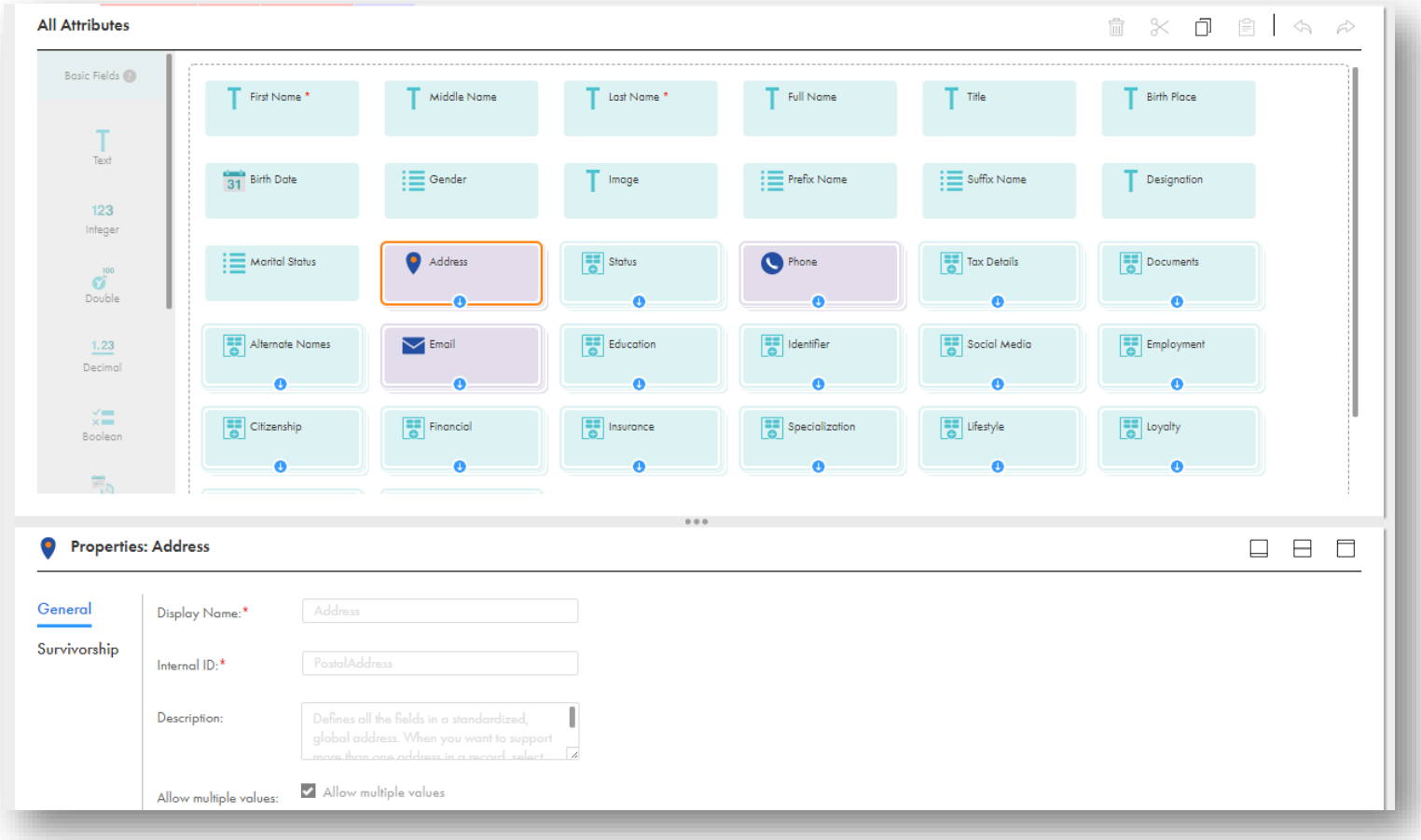
3. Model the data, definitions and requirements

Out of the box Accelerators

Easy to extend in new modeling canvas

Ref360 code lists for lookups from MDM model

Smart Fields: context aware data types



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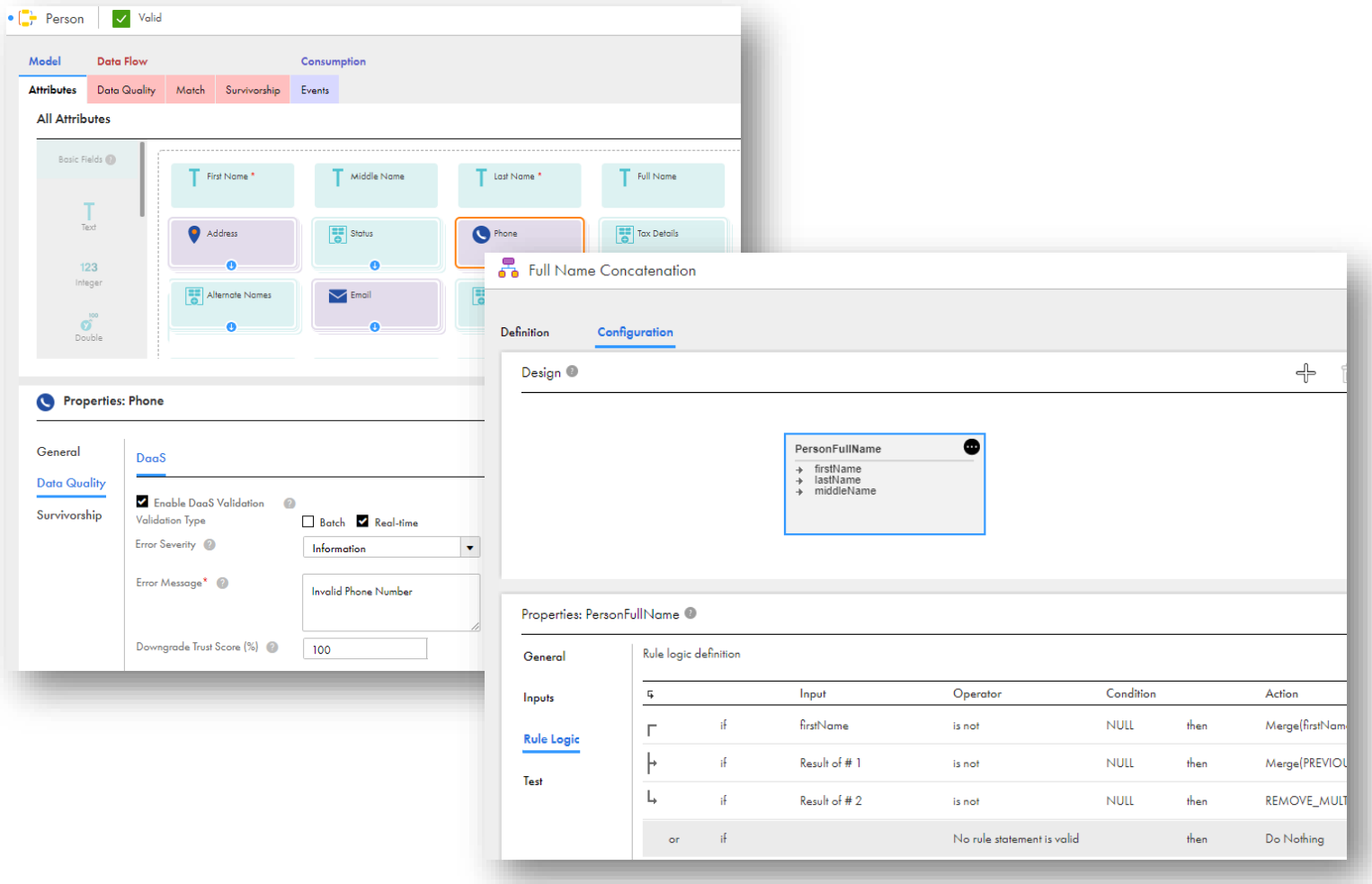
4. Define cleansing, enrichment, transformation rules

Cloud DQ – DQ rules and reference data

DQ Rules associated directly with attributes

Trust downgrades tied to DQ rule results

Contact data verification



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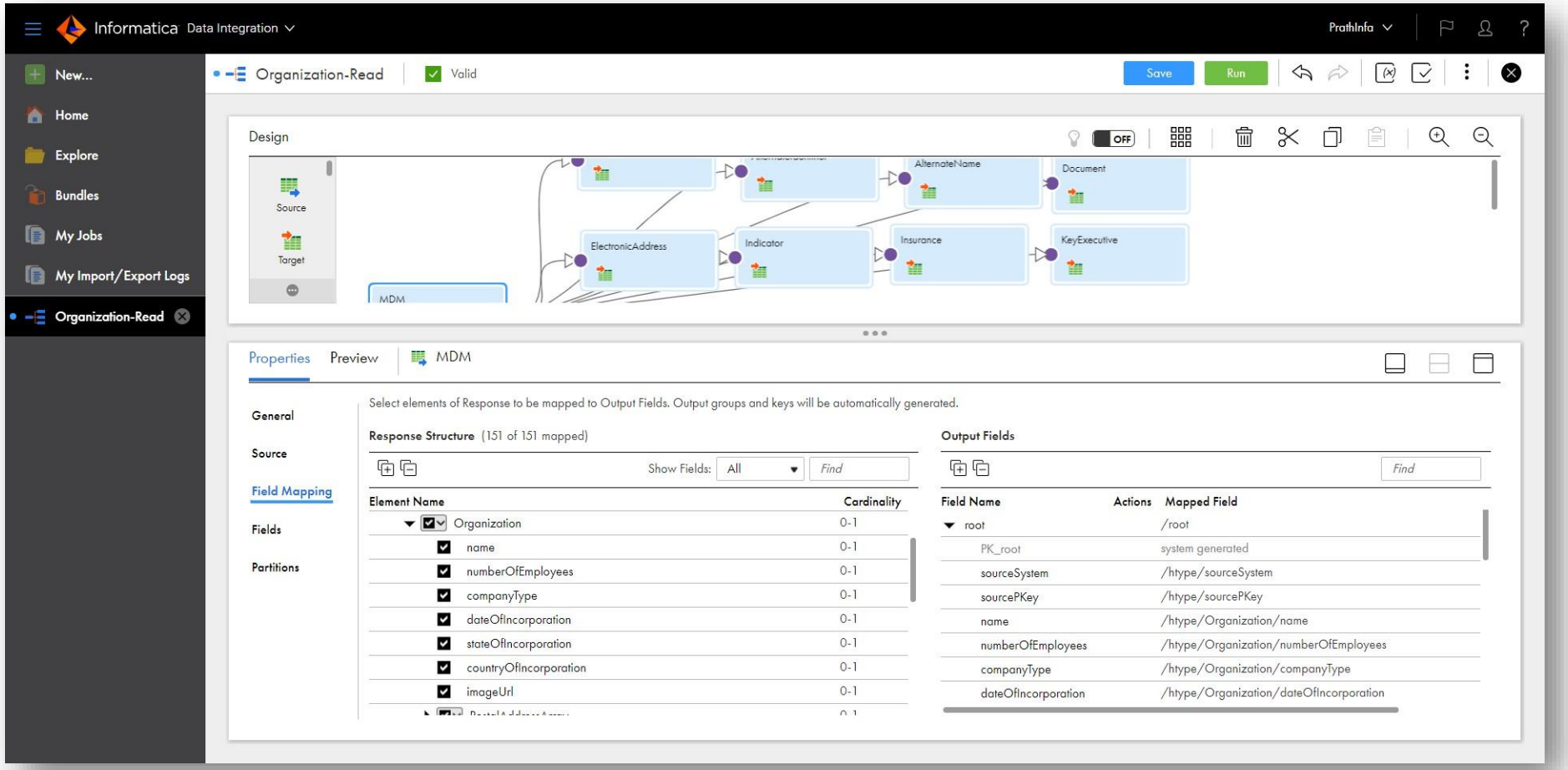
5. Map source to target attributes and crosswalks

Orchestrated data flows

Extract data in batch with Data Integration



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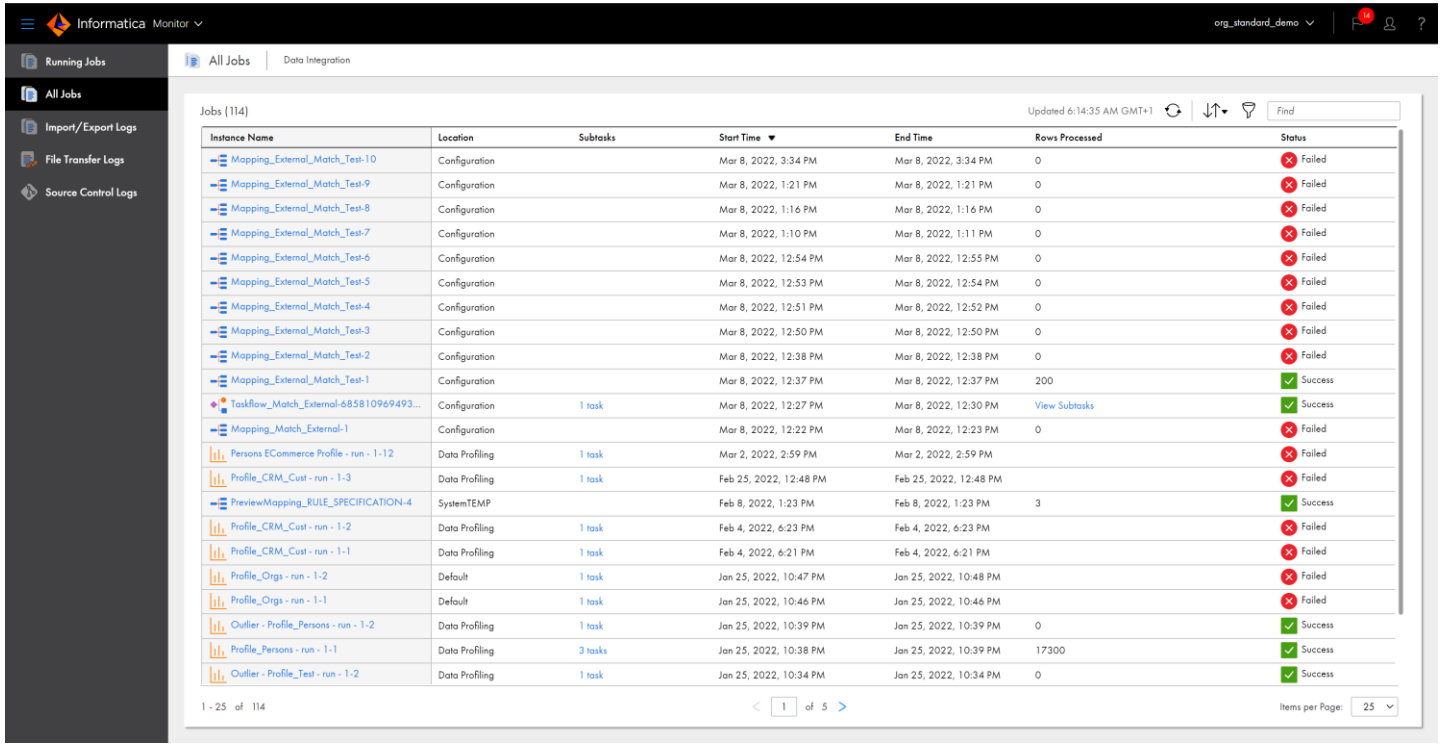
6. Test load data into target system

Convert early

Use real production data

Run multiple mock migrations

Establish benchmarks



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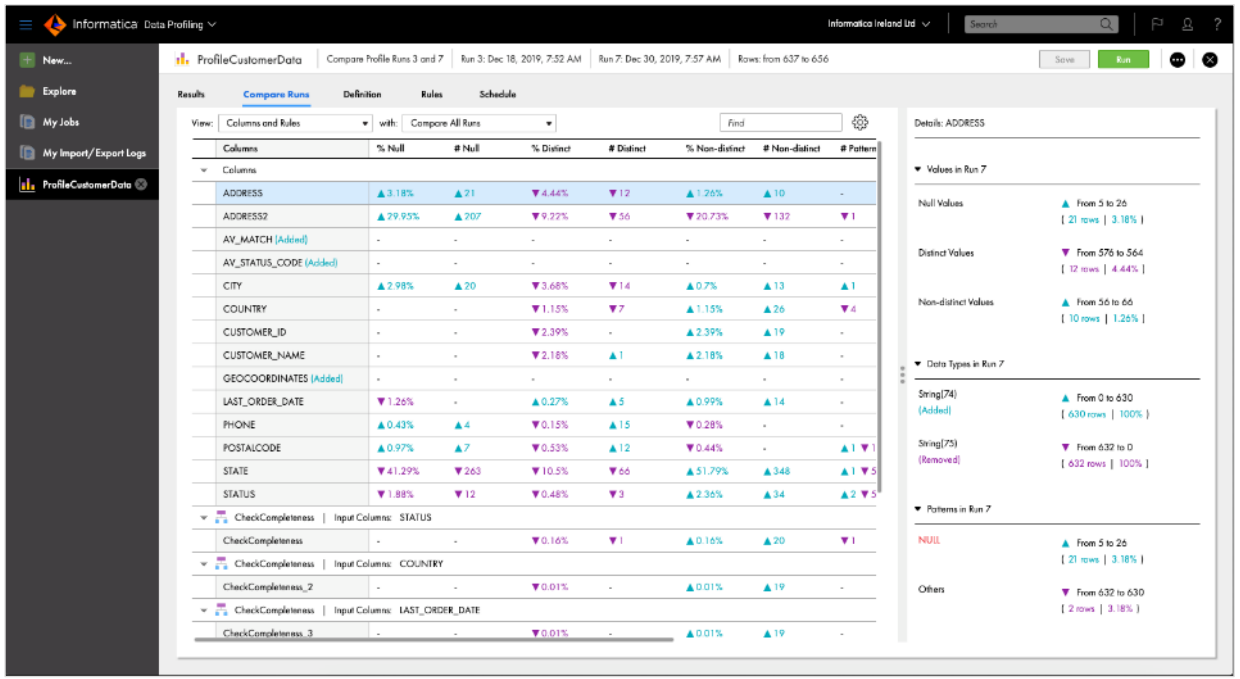
7. Monitor quality and exceptions

Track data quality improvements over time

Provide value to business users from onset

Align data quality/governance and data migration efforts

Enable IT to focus on exceptions



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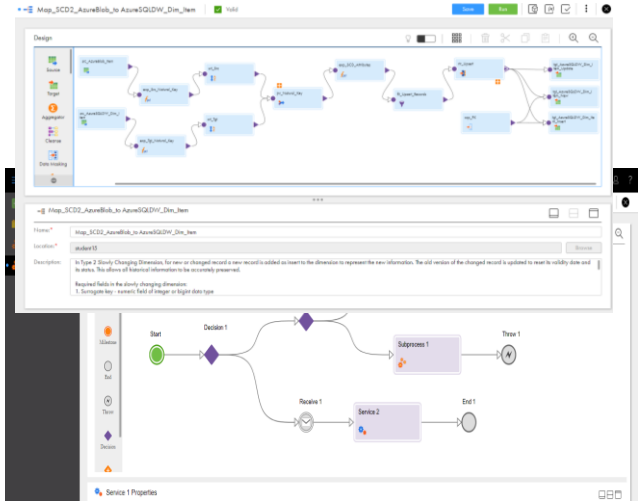
8. Migrate data to new system and audit

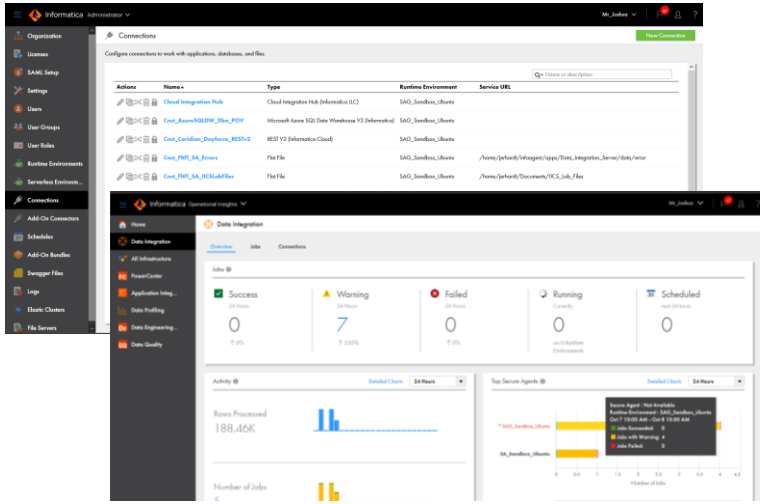
Developers

Admins

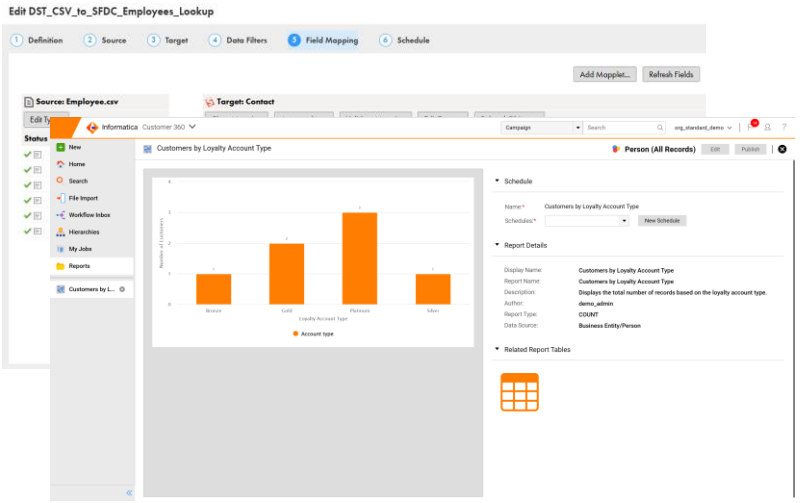
Business Users



On standby



Monitoring migration jobs



Audit the new system

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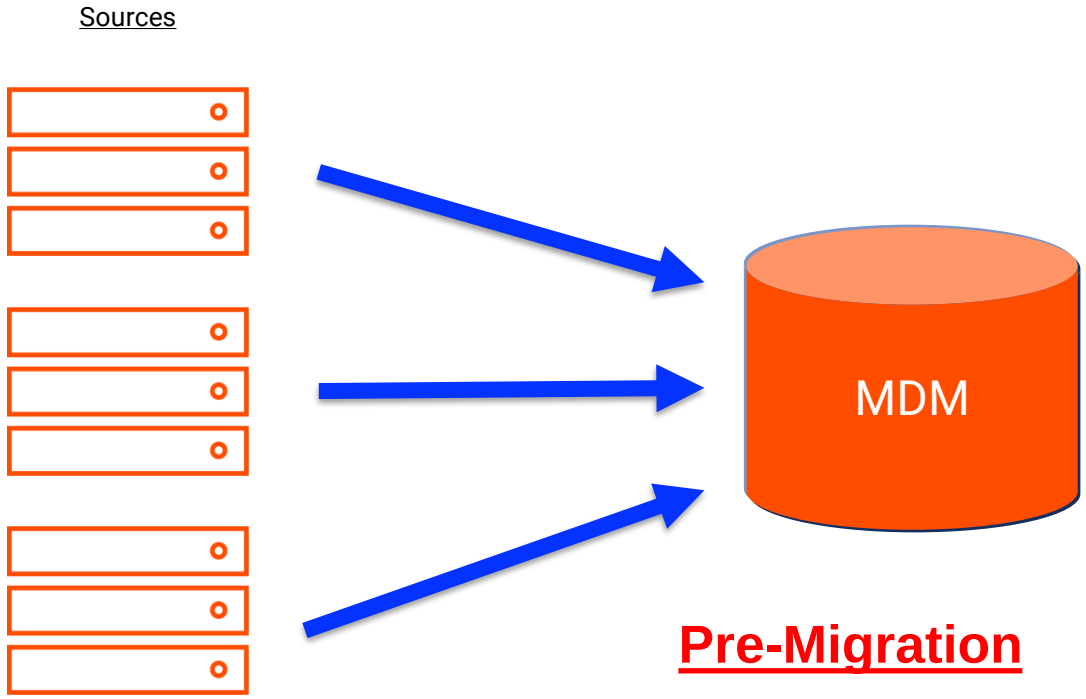
9. Keep data in sync (pre-migration)



Pre-Migration

1. **Cleanse, standardize, and enrich** dirty data
2. **Remove duplicates** and create a best version of the truth
3. **Centrally manage** data cleansing/ mastering rules

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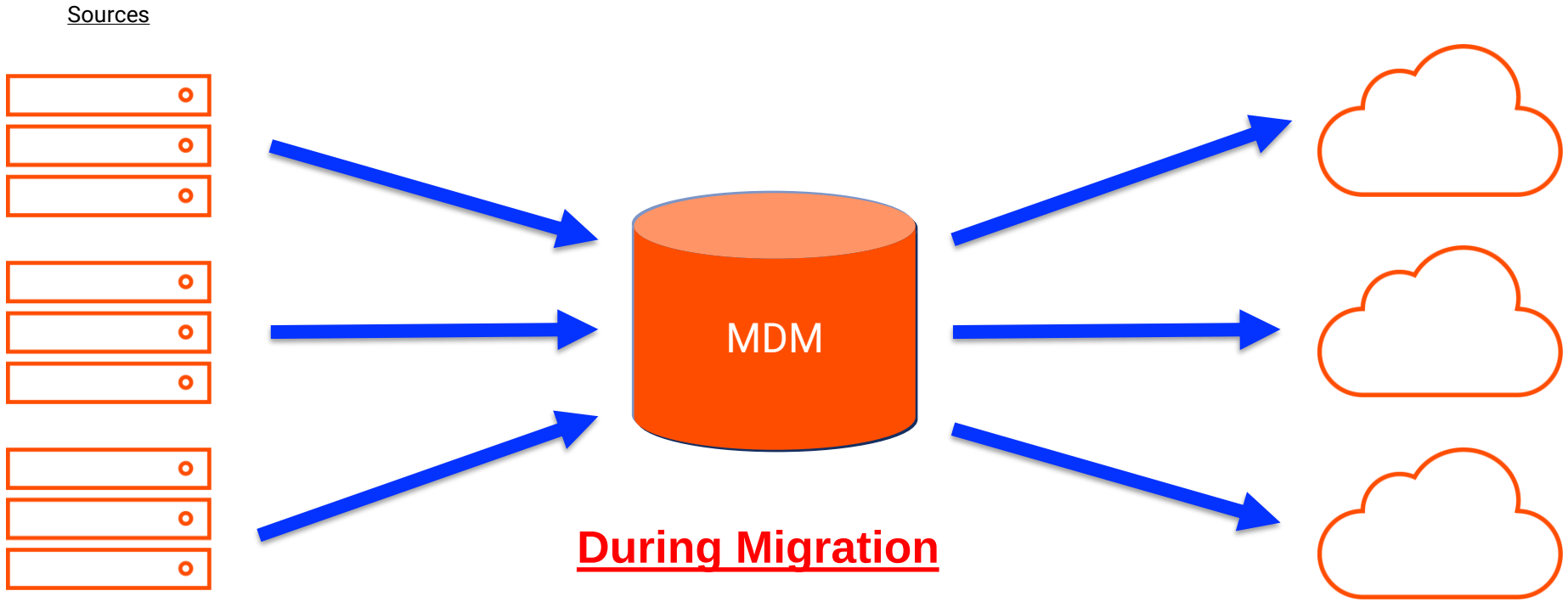
9. Keep data in sync (during migration)



During Migration

1. **Avoid** spaghetti point-to-point integrations
2. **Simplify integration** with hub-and-spoke architecture
3. **Automate** data management of very large volumes of data

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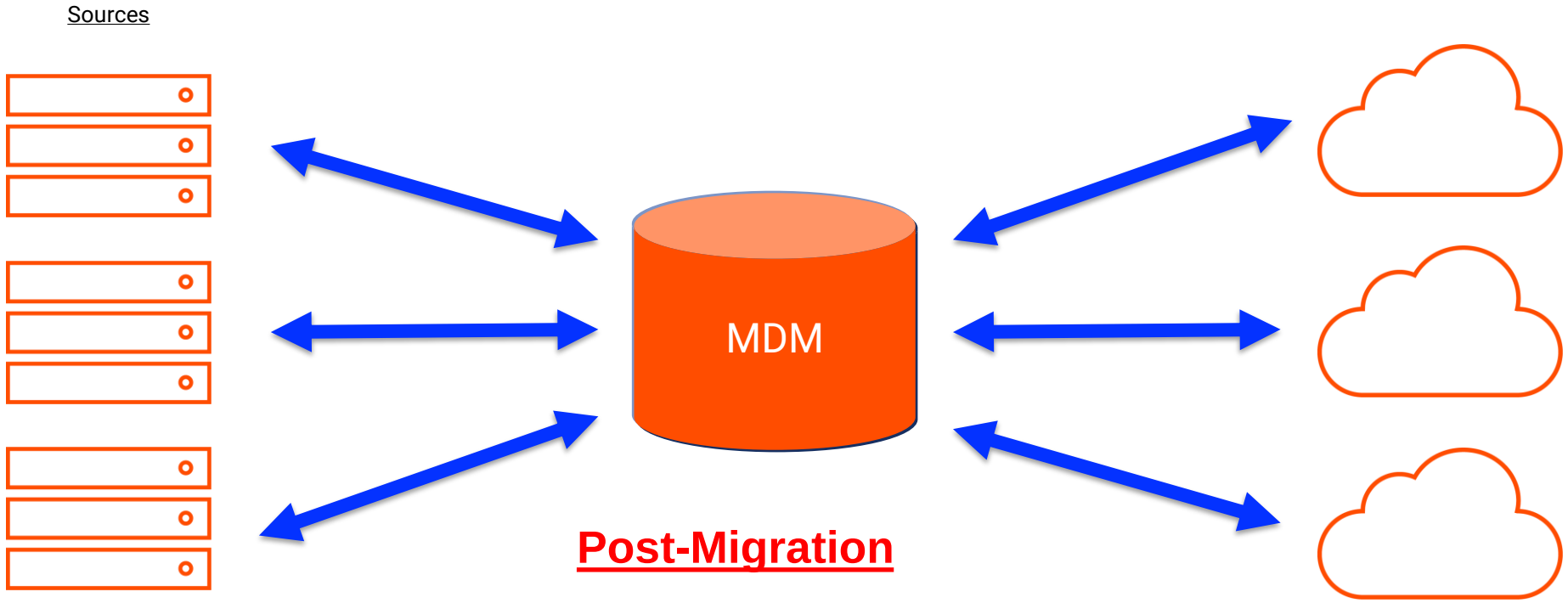
9. Keep data in sync (Post-migration)



Post-Migration

1. **Synchronize clean data** from new systems with old systems
2. **Minimize disruption** to business processes still using old systems (until they are retired)
3. **Implement information governance** across the enterprise

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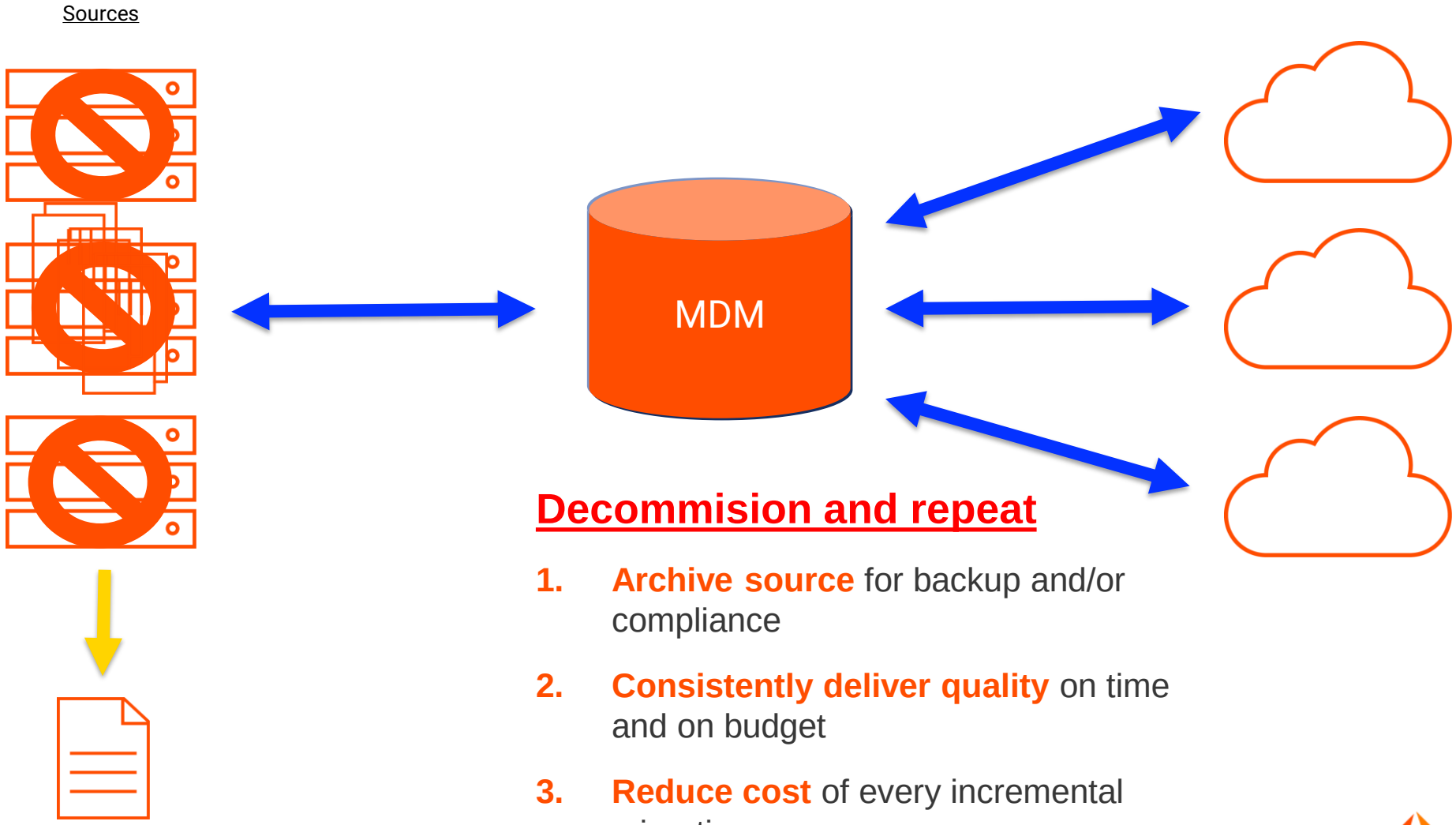
10. Decommission source system



Decommision and repeat

1. **Archive source** for backup and/or compliance
2. **Consistently deliver quality** on time and on budget
3. **Reduce cost** of every incremental migration
4. **Scale** as your business grow

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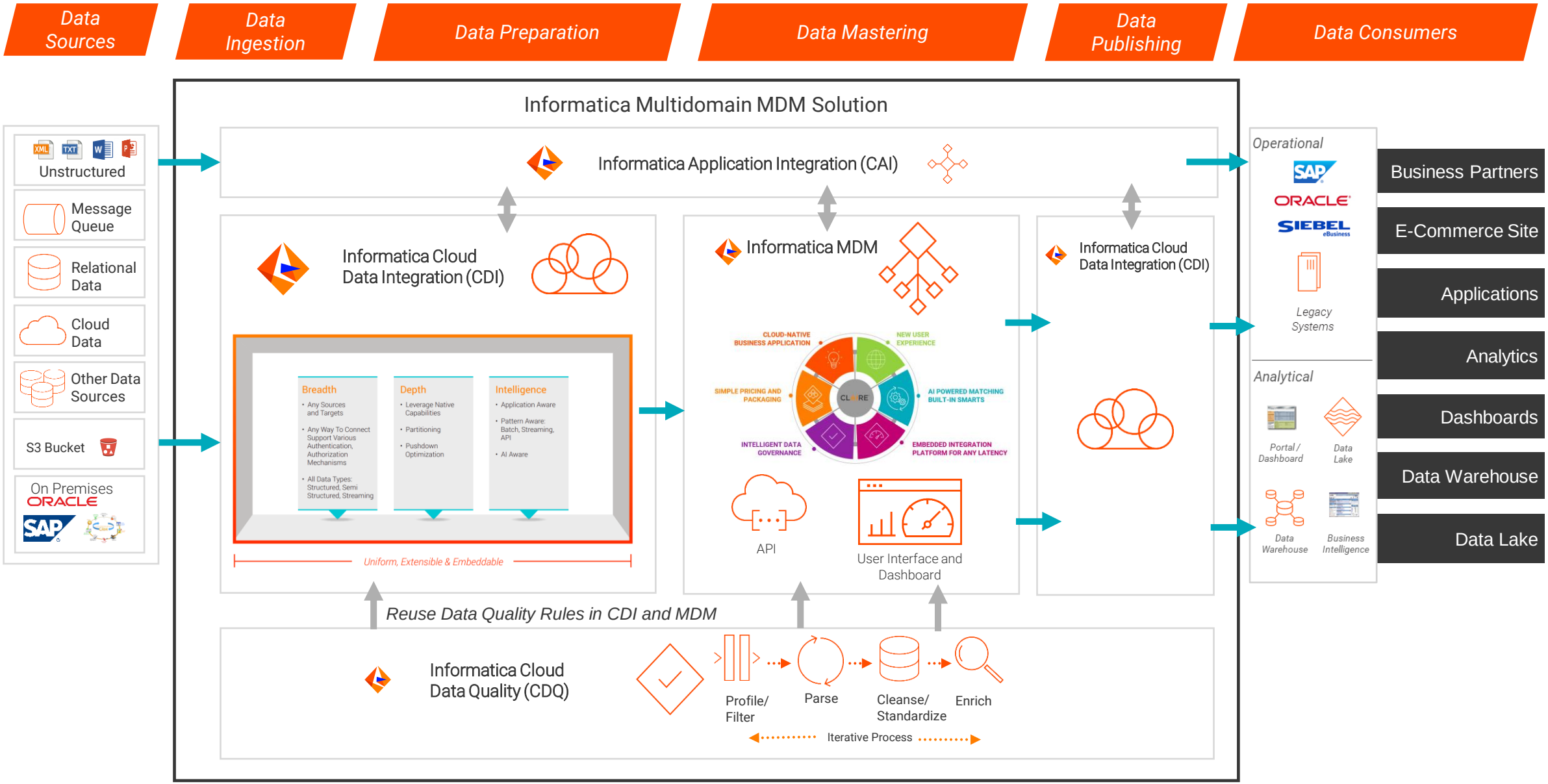
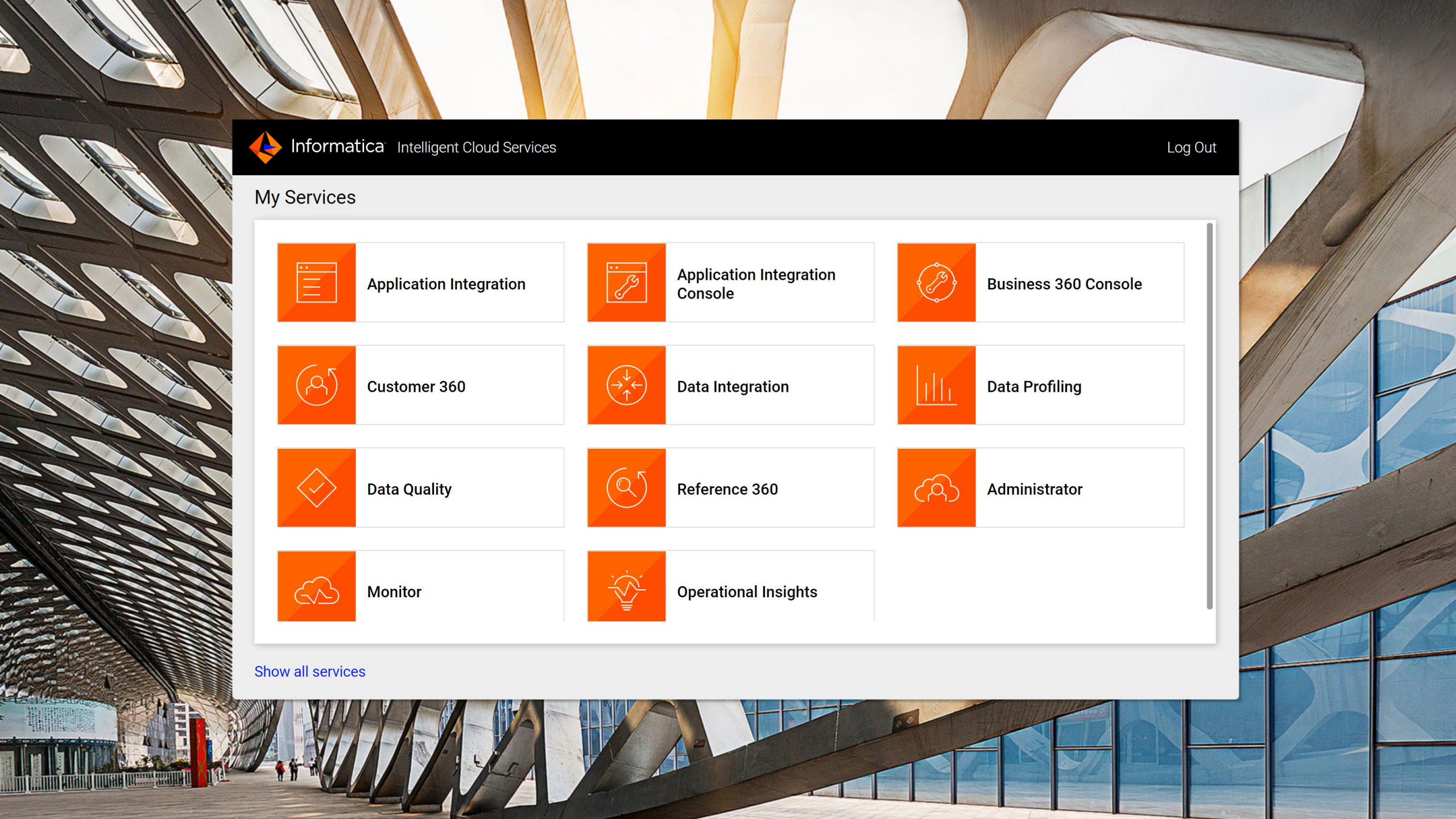
How does it all come together?




Informatica Intelligent Cloud Services
Log Out
My Services
Application Integration
Application Integration Console
Business 360 Console
Customer 360
Data Integration
Data Profiling
Data Quality
Reference 360
Administrator
Monitor
Operational Insights
Show all services

Customer Case

Accelerating Modernization

- One of the world's largest agricultural processors and food ingredient providers
- Operating in 160+ countries
- Rapid ongoing growth through many acquisitions
- Simplification and Reduction of costs by standardizing on ONE global ERP system

Guiding principles

Establish MDM principles

- Data is system agnostic
- Master data describes unambiguously the ‘thing’ it is describing
- Differentiate between global, local (regulatory), local (processing) requirements
- Govern master data not the MDM solution

Existing architectural principals

- Design for reusability
- Design for agility
- Design for adaptability
- Design for efficiency and effectiveness and a great user experience

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The Benefits

- Drove digital transformation starting with visibility into end-to-end relationships and lineage between suppliers, products, customers, locations and employees.
- Ability to turn off legacy systems and reduce costs
- Streamlined processes; gained a single trusted view of suppliers across regions and systems; and enhanced accuracy of data.

Questions?

While we answer some of your questions please feel free to also share your thoughts about the session today

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Thank You!