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# Gartner Master Data Management Summit 2010

April 14 – 16 • Las Vegas, NV • [gartner.com/us/mdm](http://gartner.com/us/mdm)

## Information Architecture MDM Strategies Data Governance CUSTOMER & PRODUCT DATA DATA QUALITY & INTEGRATION

### Taking MDM to the Next Level

#### GUEST KEYNOTE



**Jeff Gibson**  
Vice President  
The Table Group

#### CONFERENCE CO-CHAIRS



**John Radcliffe**  
Vice President  
Gartner Research



**Andrew White**  
Vice President  
Gartner Research

- Creating a business-driven MDM strategy
- The role of MDM in BI, performance management and information architecture
- How will MDM evolve in this new decade?
- The link between MDM and other business and IT disciplines/practices

A GARTNER FOR IT LEADERS SUMMIT

**Gartner**  
Master Data  
Management  
Summit 2010

# Summit Overview

## Who should attend

- IT senior executives
- IT managers involved in MDM
- Enterprise and solution architects
- MDM, customer data integration, product information management, project and program managers
- Sales, marketing, service, manufacturing, operations, procurement and supply chain executives
- Business application managers, analysts and systems analysts
- Information managers and architects
- Data and data model architects
- Application development and integration managers and architects
- Business intelligence and performance management leaders

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Create a single view of your customers, products and suppliers.

### Why is master data management so important right now?

Some organizations are growing, some are preparing for growth, and yet others are still managing costs to satisfy survival strategies. Independent of your business strategy, there are business processes that focus on customers, suppliers, products and services that span departments, business units and firewalls. These processes describe how an organization does what it does; to improve performance, reduce costs, ensure compliance, drive revenue and reduce time-to-market, a clean, consistent single view of master data is required.

Master data management is the cornerstone of nearly every critical business transaction. Knowing how to capitalize on it may be the strategic differentiator your organization needs. MDM is not a single project but an ongoing journey.

Our comprehensive best-practice approach to MDM strategy and implementation, plus the enabling technology, is designed to meet your specific needs by delivering the right level of insight and analysis.

Whether you're taking your first steps into the world of MDM or are ready for the next phase, the Gartner Master Data Management Summit provides actionable guidance to help you achieve business value.

### What's new at the summit

Whether you're an early adopter or a fast follower, you can expect new insight, fresh analysis and informed guidance on:

- The best MDM strategies to prepare for growth after the recession
- An agenda designed for foundational, intermediate and advanced levels
- Hands-on workshops to help you solve complex problems and prepare effective next-step tasks for your MDM program.\*
- In-depth examination of the realities of vendors' multidomain MDM claims
- What is analytical MDM, how can it improve decision making and how it relates to operational MDM
- How MDM complements your data integration, data quality and data warehousing strategies

\*Please note that seating is limited, so book your seat early.

# Benefits of Attending

The Gartner Master Data Management Summit is the only place with the breadth and depth of content you need for MDM success.

## Make MDM happen

- Create a successful MDM program.
- See through vendor hype in order to choose the right MDM technologies.
- Persuade the business to take a leadership role.
- Deliver measurable ROI by linking your MDM to business metrics.
- Reduce costs and increase efficiency by removing duplication and creating consistency.
- Improve customer acquisition and cross-selling/upselling activities.
- Meet compliance regulations and leverage your master data to manage risk.
- Consolidate and leverage data faster following mergers and acquisitions.
- Accelerate your product introductions.
- Manage your supply chain more efficiently.

## Attention, IT and business leaders

MDM isn't just about technology. Over the next four years, organizations will struggle to demonstrate the business value of MDM unless they take a business-oriented approach. With the summit's in-depth best-practice approach and business-driven agenda, both IT executives and their business counterparts will see what it takes to plan, implement and govern a holistic MDM program that adds business value to their organization. See page 11 for our special team registration discounts.

## Hot topics

- Key trends shaping the MDM market
- Creating a holistic, business-driven MDM program
- Leveraging the right implementation styles
- Building the right governance and organization for MDM
- Expanding into new master data domains using the right organizational structures
- Multidomain MDM and vendor hype
- Aligning with enterprise information architecture
- MDM in relation to customer data integration and product information management
- Linking MDM to your SOA strategy
- How MDM relates to data warehousing
- Applying data quality to master data
- Analytical MDM

“By 2014, 66% of Fortune 1000 companies will have deployed two or more MDM solutions.”

# Keynote Sessions



**Jeff Gibson**  
Vice President  
The Table Group

## Guest Keynote

### The Five Dysfunctions of a Team

THURSDAY, APRIL 15, 8:00 A.M.

Based on Patrick Lencioni's bestselling book, *The Five Dysfunctions of a Team*, Jeff Gibson, VP of consulting at The Table Group and Lencioni's coworker, uncovers the natural human tendencies that derail teams and lead to politics and confusion in so many organizations. He makes the point that if you can get all the people in an organization rowing in the same direction, you can dominate any industry, in any market, against any competition, at any time.

Jeff reveals the five key characteristics of world-class teams and shows leaders how to bring about genuine trust, unfiltered discussion, steadfast commitment to decisions, peer-to-peer accountability and unwavering drive to results.



**John Radcliffe**  
Vice President  
Gartner Research

## Gartner Keynote

### The MDM Scenario: A New Decade for MDM

WEDNESDAY, APRIL 14, 1:00 P.M.

With the economy improving, many organizations are now positioned for growth while continuing to carefully manage costs. The need for MDM continues to grow and it is poised to help organizations meet the business challenges of the new decade. Gartner analysts John Radcliffe and Andrew White take stock of what MDM has achieved so far and chart the journey going forward. They share their predictions about where MDM is going in terms of technology, best practices, the market and vendor landscape, giving you the Gartner vision for the future of MDM. Find out:

- Where is MDM today and what are the current trends and hot spots?
- What will be the key trends in MDM best practices and technology?
- How will MDM evolve in the next decade, and which vendors will win?



**Andrew White**  
Vice President  
Gartner Research

“By 2013, MDM will reduce data redundancy in organizations, resulting in an 80% cost saving in managing redundant data.”

# Meet the Analysts

For over 25 years, Gartner analysts have been the trusted advisors to many of the world's largest and most demanding organizations. Gartner analysts continually draw from the real-life challenges and solutions experienced by 60,000 clients worldwide.

**Focus areas:** Data management and integration, application development and integration



**Mark Beyer**  
Vice President

**Focus areas:** Information and application architecture, business and IT modeling tools, model-driven developments, metadata management



**Michael Blechar**  
Vice President  
Distinguished Analyst

**Focus areas:** Enterprise and supply chain management, software markets



**Charles Eschinger**  
Director

**Focus areas:** Data integration, data quality, information governance



**Ted Friedman**  
Vice President  
Distinguished Analyst

**Focus areas:** Enterprise information management, governance, risk and compliance (e-discovery)



**Debra Logan**  
Vice President  
Distinguished Analyst

**Focus area:** Enterprise architecture



**David Newman**  
Vice President

**Focus areas:** Master data management, customer relationship management



**John Radcliffe**  
Vice President

**Focus areas:** BI and performance management, BI platform standardization, business intelligence competency centers



**Kurt Schlegel**  
Vice President

**Focus area:** IT management



**Michael Smith**  
Vice President

**Focus areas:** Cross industries, business intelligence, ERP and supply chain management, regulatory compliance



**John Van Decker**  
Vice President

**Focus areas:** Master data management, ERP and supply chain management



**Andrew White**  
Vice President

# Agenda Tracks

## Why Gartner

Gartner produces the world's leading technology conferences for CIOs, IT leaders and business executives to equip you with the knowledge, insight and advice you need to create business value from technology and become more successful in your role. Gartner was first to recognize the importance of MDM by creating the world's first MDM summit. Gartner has the largest team with the deepest and widest focus to bring together all the research you need for MDM in one location. Get immediate answers to your pressing challenges through:

- Direct access to the world's leading MDM-related research—stimulating presentations, interactive workshops and one-on-one meetings with Gartner analysts
- Networking and interactions with decision makers from organizations spanning every industry and government sector
- Real-life end-user case studies and MDM best practices

The latest product demonstrations, hands-on experience and in-depth discussions with product experts from today's leading MDM technology providers and those driving the innovations of tomorrow

Whether you're a Gartner client or not, attending any of our 70-plus global events is simply the most cost-effective and time efficient way to stay on top of what's current, grow your leadership skills and accelerate your success.

## Create an MDM action plan customized to your needs.

The 2010 agenda addresses a range of MDM maturity levels, from beginner to intermediate and advanced. You'll find conference content packed with industry best practices that are easy to leverage.

### A

#### Initiate: Getting Started With MDM

New to MDM? It's critical to grasp the secrets of success at the very beginning, rather than learn them painfully late. Take note: successful MDM programs are business-driven and built on best practices. With that in mind, this track explores the Gartner proven framework, the seven building blocks of MDM, and delves into such key foundational areas as building the business case and creating the right governance framework. For MDM beginners, this is the place to get it right if you want to achieve success in your MDM program early on.

### B

#### Reinforce: Moving Beyond the First MDM Initiative

MDM is a journey with many facets. Organizations in different industries have different MDM needs. As the scope of their MDM initiative widens, they'll need to tackle a range of different master data domains, use cases and implementation styles successfully. But that's not all. As they move from phase to phase, the maturity level of their organization's own MDM capabilities should grow accordingly. This track is designed for intermediate users ready to navigate the next stage of their MDM journey.

### C

#### Converge: Understanding How MDM Impacts So Many Other Things

The more you work on MDM, the more you realize how central it is to your organization's business success and how much it enables and ties into other initiatives such as SOA, enterprise information architecture, data quality and integration, metadata management, BPM, BI and performance management and more. This track explores the convergence and interactions between these initiatives and MDM and provides advice on where all this is taking us and how to prepare for it.

# Summit Highlights

## Maximize your experience

Take a look at these special conference features designed to maximize the professional and personal benefits Gartner Master Data Management Summit delivers. Get ready to experience all this at one event.

### Gartner Analyst Sessions

Independent and objective analysis from Gartner Research, the world's leading IT research and advisory team. Trusted, actionable insight is our trademark.

### Tutorial

A complimentary pre-conference MDM 101 session gets you up to speed on MDM: definitions, terms and background on where MDM came from.

### Analyst one-on-ones

Meet face-to-face with Gartner analysts for 30 minutes of personalized advice on the MDM topic of your choice.

### Solution provider sessions

Leading providers share best practices, strategy and offerings. End users share their lessons learned from real-world implementations.

### Solution Provider Showcase

Kick-start your own vendor research, meet with company representatives to discuss your MDM challenges and create a shortlist of providers and solutions.

### Hospitality suites

Enjoy a great way to network informally with your summit colleagues at the end of the day.

### Interactive workshops

These 90-minute moderated workshops provide an opportunity to work with peers on common MDM challenges, learning from others and sharing best practices across industries. Workshops are designed for MDM beginners, as well as those at intermediate and advanced levels.

### Analyst-user roundtables

These small, interactive peer-exchange sessions address your top MDM challenges.

### End-user case study sessions

Hear firsthand from those who have implemented successful MDM initiatives.

## Leading solution providers, demos and case studies

Meet with today's leading solution providers, all under one roof. Get your questions answered and create your own shortlist of preferred providers.

## Analyst-user roundtables

Moderated by Gartner analysts, these small, highly informative sessions provide a peer-to-peer forum to share experiences and challenges. Topics include:

- Enabling AD, SOA and MDM Collaboration
- Reconciling Operational and Analytical Master Data Management
- Embedding MDM in EIM and Your Information Architecture
- Data Quality and MDM

## Gartner analyst one-on-ones

Have a 30-minute sit-down with one of our analysts and enjoy targeted advice on your individual MDM concerns. Reservation required.

## Agenda guidance

Use our convenient Agenda Builder to create your own conference curriculum prior to the event. See complete details at [gartner.com/us/mdm](http://gartner.com/us/mdm).

“Through 2014, 66% of IT organizations will struggle to demonstrate the business value of MDM.”

# Agenda at a Glance

## Wednesday, April 14

|            |  |  |   |
|------------|--|--|---|
| 9:00 a.m.  | Registration   |  |   |
| 11:00 a.m. | T1. Tutorial: MDM Concepts and Introduction <i>John Radcliffe, Andrew White</i>  |  |   |
| 12:00 p.m. | Lunch for MDM Tutorial Attendees   |  |   |
| 12:45 p.m. | <b>K1a. Gartner Keynote:</b> MDM in 60 Seconds or Bust   |  |   |
| 1:00 p.m.  | <b>K1b. Keynote:</b> The MDM Scenario — A New Decade for MDM <i>John Radcliffe, Andrew White</i>   |  |   |
|            | <b>Track A<br/>Initiate: Getting Started<br/>With MDM</b>  | <b>Track B<br/>Reinforce: Moving Beyond the First<br/>MDM Initiative</b>                         | <b>Track C<br/>Converge: Understanding How<br/>MDM Impacts So Many Other Things</b>                         |
| 2:15 p.m.  | A1. The Gartner Seven Building Blocks of MDM: The Foundation for Successful MDM <i>John Radcliffe</i>  | B1. Using the Gartner Maturity Model for MDM to Develop Your MDM Road Map <i>Andrew White</i>    | C1. Architecting for Participation: How Information Sharing Overcomes Information Silos <i>David Newman</i> |
| 2:15 p.m.  | Workshop: Building a Business Case <i>Michael Smith, Bill Swanton</i> <b>F</b>   |  |   |
| 3:30 p.m.  | A2. MDM, BPM and Performance Management: How Do These Disciplines Link to Maximize Business Performance? <i>John E. Van Decker, Andrew White</i> | B2. Data Warehousing, Data Services, the Information Infrastructure and MDM <i>Mark A. Beyer</i> | C2. Enterprise Information Management 2010 <i>Debra Logan</i>   |
| 3:30 p.m.  | Analyst-User Roundtable: Enabling AD, SOA and MDM Collaboration <i>Michael Blechar</i> <b>F</b> <b>I</b>   |  |   |
| 4:45 p.m.  | <b>K2. Gartner Keynote:</b> Magic Quadrant Power Session for MDM and Associated Technologies <i>Gartner Analysts</i>                             |  |   |
| 5:45 p.m.  | Solution Showcase  |  |   |

## Thursday, April 15

|            |   |  |   |
|------------|---|--|---|
| 7:00 a.m.  | Registration and Breakfast  |  |   |
| 8:00 a.m.  | <b>K3. Guest Keynote:</b> <i>Jeff Gibson, Vice President of Consulting, The Table Group</i>                       |  |   |
| 9:15 a.m.  | A3. Organizing for MDM: Defining, Aligning and Managing Critical Roles <i>Ted Friedman, Debra Logan</i>           | B3a. Evolving From MDM of Product Data to Multidomain MDM <i>Andrew White</i>  |   |
|            |   | B3b. Evolving From MDM of Customer Data to Multidomain MDM <i>John Radcliffe</i>                                     |   |
| 9:15 a.m.  | Analyst-User Roundtable: Reconciling Operational and Analytical MDM <i>Kurt Schlegel</i> <b>F</b>                 | Workshop: Barriers to MDM and How to Get Over Them <i>Debra Logan</i> <b>F</b> <b>I</b>                              |   |
| 10:30 a.m. | Solution Provider Session   |  |   |
| 11:30 a.m. | Attendee Lunch and Solution Showcase Dessert Reception  |  |   |
| 1:30 p.m.  | A4. Case Study <i>TBA</i>   | B4. Case Study <i>Daymon Worldwide</i>   | C4. Case Study <i>UMASS Healthcare</i>  |
| 2:30 p.m.  | A5. Creating a Winning MDM Vision and Strategy <i>John Radcliffe</i>  | B5. Interactive Great Debate: Analytical MDM vs. Operational MDM <i>Mark Beyer, Andrew White, Kurt Schlegel</i>      | C5. Metadata Management From an MDM Perspective <i>Michael Blechar</i>                              |
| 2:30 p.m.  | Analyst-User Roundtable: Embedding MDM in EIM and Your Information Architecture <i>David Newman</i>               | Workshop: The Realities of MDM Deployment <i>Dimitris Geragas</i>  |   |
| 3:45 p.m.  | Solution Provider Session   |  |   |
| 5:00 p.m.  | A6. How to Get Started With Governance of Master Data <i>Debra Logan, Andrew White</i>                            | B6. A Difficult Time for Software and MDM. What does 2010 Hold and Is the Worst Behind Us? <i>Chad Eschinger</i>     | C6. Relating MDM to the Application and Business Architectures of the Future <i>Michael Blechar</i> |
| 5:00 p.m.  | Analyst-User Roundtable: Experiences in Data Quality Improvement: What Works and What Doesn't <i>Ted Friedman</i> | Workshop: MDM as an enabler for BI and Performance Management <i>John Radcliffe, Kurt Schlegel</i> <b>I</b> <b>A</b> |   |
| 6:00 p.m.  | Hospitality Suites  |  |   |

## Friday, April 16

|            |  |   |   |
|------------|--|---|---|
| 7:00 a.m.  | Breakfast  |   |   |
| 7:45 a.m.  | A7. How to Measure the Benefits and Build the Business Case for MDM Initiatives <i>Michael Smith</i> | B7. Industries' Issues With MDM: Roving Internet (IAS) Reporting <i>John Radcliffe, Andrew White</i>                        | C7. Best Practices for Ensuring Optimal Master Data Quality <i>Ted Friedman</i>   |
| 7:45 a.m.  |  | Analyst-User Roundtable: Best Practices in Engaging and Using External Service Providers <i>Alex Soejarto, Bill Swanton</i> |   |
| 8:45 a.m.  |  |   | Workshop: Governance and Organization <i>Debra Logan, Andrew White</i> <b>A</b>   |
| 8:55 a.m.  | Solution Provider Sessions   |   |   |
| 9:35 a.m.  | A8. Case Study <i>TBA</i>  | B8. Case Study <i>TBA</i>   | C8. Case Study <i>TBA</i>   |
| 9:35 a.m.  |  |   | Workshop: Where is MDM going? Where does it need to go? <i>John Radcliffe, Chad Eschinger</i> <b>A</b>                                |
| 10:30 a.m. | A9. Creating Your Enterprise-Specific MDM Reference Architecture <i>Mark A. Beyer</i>                | B9. How to Use Master Data for Content Control, Consistency and Compliance <i>Debra Logan</i>                               | C9. Data Integration Technology and Architecture: Infrastructure for Efficient and Effective Master Data Delivery <i>Ted Friedman</i> |
| 10:30 a.m. | Analyst-User Roundtable <i>To be determined by attendee poll</i>                                     |   |   |
| 11:45 a.m. | <b>K4. Gartner Keynote:</b> Closing Town Hall Session <i>Gartner Analysts</i>                        |   |   |

Foundational sessions: **F** Intermediate sessions: **I** Advanced sessions: **A** Agenda as of December 21, 2009. Agenda is subject to change.



## Real-life MDM Scenarios

See how MDM has affected real enterprises like yours.

### Scenario: Reduced operational costs

The VP of operations for a midsize electronics manufacturer must deal with the burgeoning cost structure threatening the firm's survival. But with limited IT funds, the VP has little idea—other than asking for reports—of how to find “fat” in the business. The existing report structures reveal little about where to make reductions, how to streamline process and which relationships to leverage.

#### Solution:

MDM for procurement offers a single view of materials and suppliers in real time, allowing the business to leverage the assets it has and demystify the scale of relationships on the supply side.

### Scenario: Enhanced reporting and decision making

A healthcare provider struggles to provide its users with necessary information on a timely basis. Despite several costly BI initiatives, it still lacks a process that aligns line-of-business users' governance efforts with the efforts of the BI initiatives. Too many attempts at cleaning the master data have resulted in lots of one-off projects that meet requirements but eventually undermine the enterprise view of master data.

#### Solution:

Analytical MDM helps align the uses of master data in a BI environment with the operational governance routines required by the line of business. It ensures that the right master data is in the right place whenever a decision is needed.

### Scenario: Increased revenue and growth

A large financial services firm is unable to provide a customer-centric customer experience. Its application systems are based on its different products and brands, not on its customers. The result: high rates of customer attrition. Salespeople are unable to effectively up-sell and cross-sell because they can't access an accurate view of which products the customer already has.

#### Solution:

MDM for customer data lays the foundation for a shared customer profile, integrating with existing systems. It creates a centralized “golden” record for customer data such that all applications and business processes go to the system to determine whether the right data was used and whether it's accurate.

### Scenario: Compliance

A large national retailer is hit with bad press and a consumer backlash over a spate of stories in the news related to two different issues. A small product recall has blown up into huge embarrassment; a new, recently launched product is found to contain illegal materials. Although product recalls are in place and consumers are being compensated, negative stories continue.

#### Solution:

MDM for product and asset data can help the enterprise achieve a single view of products and assets in a timely fashion, forming the basis for an enterprisewide view of supplier risk exposure.

# Session Descriptions

## Keynotes

### **K1a. MDM in 60 Seconds or Bust**

In this fast-moving opening session, Gartner analysts give you an overview of the entire MDM Summit to help you gain a flavor of the content and get to the right sessions, since you can't be in two places at one time.

*All analysts*

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### **K1b. The MDM Scenario: A New Decade for MDM**

With the economy improving, many organizations are now poised for growth, while continuing to carefully manage costs. The need for MDM continues to grow and it has potential to help organizations meet the business challenges of the new decade. We take stock of what MDM has achieved so far and chart the journey going forward. We share our predictions about where MDM is going in terms of technology, best practices, the market and vendor landscape giving you the Gartner vision for the future of MDM.

- Where is MDM today, and what are the current trends and hot spots?
- What will be the key trends in MDM best practices and technology?
- How will MDM evolve in the next decade, and which vendors will win?

*Andrew White, Vice President*

*John Radcliffe, Vice President*

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### **K2. Magic Quadrant Power Session for MDM and Associated Technologies**

In this panel, Gartner analysts give their perspectives on the technology providers that feature in the MDM, Data Quality and Data Integration Magic Quadrants. Ask questions about vendors or technologies and hear the Gartner position—unscripted, unfiltered and unbiased.

*Mark A. Beyer, Vice President*

*Ted Friedman, Vice President and Distinguished Analyst*

*John Radcliffe, Vice President*

*Andrew White, Vice President*

*Kurt Schlegel, Vice President*

*Debra Logan, Vice President and Distinguished Analyst*

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### **K3. Guest Keynote: The Five Dysfunctions of a Team**

Based on Patrick Lencioni's best-selling book, *The Five Dysfunctions of a Team*, Jeff Gibson, Vice President of Consulting at The Table Group and a close colleague of Lencioni, uncovers the natural human tendencies that derail teams and lead to politics and confusion in so many organizations. He makes the point that if you can get all the people in an organization rowing in the same direction, you could dominate any industry, in any market, against any competition, at any time. Gibson reveals the five key characteristics of world-class teams and shows leaders how to bring about genuine trust, unfiltered discussion, steadfast commitment to decisions, peer-to-peer accountability and unwavering drive to results.

*Jeff Gibson, Vice President of Consulting, The Table Group*

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### **K4. Gartner Keynote: Town Hall**

This closing session highlights the most important themes and concepts raised during the conference, summarizes the key action items and recommendations, and concludes with a panel of analysts that will answer any and all remaining questions from attendees.

*All analysts*

## Track A

### Initiate: Getting Started With MDM

#### **A1. The Gartner Seven Building Blocks of MDM: The Foundation for Successful MDM**

MDM is not just about technology, and MDM program managers should use a business-driven, holistic framework to ensure that all the component parts of MDM are being addressed. The MDM program needs to align with the business vision, and success needs to be measured through a set of metrics. Also key to success is the ability to strike the right balance between technology and governance and organizational issues. This presentation will provide you with an overview of the Gartner seven building blocks of MDM framework and illustrate it with case studies.

- How will organizations create an MDM vision, strategy and business case?
- How will organizations address the governance and organizational challenges that are a barrier to MDM success?
- How will organizations create the technology infrastructure necessary for MDM success?

*John Radcliffe, Vice President*

#### **A2. MDM, BPM and Performance Management: How Do These Disciplines Link to Maximize Business Performance?**

Data and process integrity is instantiated in business applications that are used to drive improved business performance. To date, users have not linked MDM, BPM and performance management that closely. This presentation introduces the three disciplines and explains how they should interact. The session closes by looking at the maturity and status of how users are aligning these efforts.

- What are MDM, BPM and PM, and do they exist as independent disciplines, and start to converge with analytical MDM?
- How do data, process and application interact to support improved business improvement?
- What are the maturity of these three disciplines and how are users beginning to put them together?

*John E. Van Decker, Vice President*

*Andrew White, Vice President*

#### **A3. Organizing for MDM: Defining, Aligning and Managing Critical Roles**

MDM program managers face numerous challenges that have nothing to do with technology. The most significant of these involves harnessing the people to set vision, fund, manage and execute on MDM goals. A matrixed organization with clear roles and responsibilities will be necessary to build and operationalize the plan. Identifying key resources, both those directly within the MDM program as well as new roles outside the program that can influence the direction of MDM, is a critical-path activity.

- Why is organization—roles, people, and their alignment—critical to MDM success?
- What new roles and organizational structures must be created to maintain an effective and relevant MDM program?
- How can MDM program managers successfully manage MDM stakeholders and ongoing change?

*Ted Friedman, Vice President and Distinguished Analyst*

*Debra Logan, Vice President and Distinguished Analyst*

# Session Descriptions

## **A5. Creating a Winning MDM Vision and Strategy**

The MDM vision has to be all about how MDM can enable the organization's business vision, as opposed to an IT infrastructure project that the business doesn't buy into. Then the MDM strategy translates that vision into a reality, but although MDM is a simple concept, the simplicity masks a huge amount of complexity. This presentation explores the five vectors of complexity (industry, domain, use case, organization and implementation style) that describe MDM, and helps organizations build a successful MDM strategy.

- What should an MDM vision and strategy look like?
- What are the five vectors of complexity that describe MDM, and how are they evolving?
- How are other organizations approaching the structuring of their MDM initiatives, and what best practices can help you succeed?

*John Radcliffe, Vice President*

## **A6. How to Get Started With Governance of Master Data**

Governance of information remains a lofty goal, too often associated with "control," and too often poorly tied to business value. Does MDM establish "control"? Does MDM enable governance, or does governance of master data lead to MDM? This presentation defines governance of master data, and explores how governance links and leverages your organization to your MDM processes. The presentation ends by reviewing best practices to help avoid pitfalls in implementing governance of master data.

- What is governance of master data and why is it so important?
- How does governance, organization, and process intersect with MDM?
- What are the best practices around governance of master data?

*Debra Logan, Vice President and Distinguished Analyst*  
*Andrew White, Vice President*

## **A7. How to Measure the Benefits and Build the Business Case for MDM Initiatives**

As the current period of economic risk and uncertainty continues, business executives are dramatically shifting from "gut feel" to fact-based decision making. MDM addresses this need by improving the data quality, consistency, and integrity required to make fact-based decisions. This presentation explains how to measure the financial benefits of lower risk and uncertainty made possible by MDM and to build the business case for MDM initiatives.

- What is the process for building an effective business case for your MDM project?
- What metrics can be used to quantify the benefits of lower risk and uncertainty resulting from your MDM initiative?
- How can the business case be used to manage your project throughout its entire life cycle?

*Michael Smith, Vice President*

**A9. Creating Your Enterprise-Specific MDM Reference Architecture**

MDM is being implemented in different ways; those differences emerging across industry, use case, data domain and implementation style vectors. The technology and tools differ based on verticals, existing application stacks and where the enterprise begins its MDM journey. Every firm has a different technology stack, governance framework and organization and political structure, complicating adoption. Gartner explains how to leverage existing techniques and tools and how identifying and filling gaps creates your custom MDM reference architecture.

- What are the benefits and challenges for the enterprise associated with various approaches to MDM?
- How can you build upon existing data management practices to deploy enterprise MDM?
- How to identify the components of the enterprise MDM reference architecture.

*Mark A. Beyer, Vice President*

**Track B****Reinforce: Moving Beyond the First MDM Initiative****B1. Using the Gartner Maturity Model for MDM to Develop Your MDM Road Map**

To know what your next step should be with MDM, you need to know what your last step was. This track leads off with a presentation introducing the Gartner maturity model for MDM. This maturity model can be used to help you determine your current position, and to figure out what you need to do next, in order to add more value to the business with MDM. Guardrails are provided to ensure your MDM journey is managed effectively.

- How is MDM being adopted today, and what patterns have emerged from this work to date?
- How can you use the Gartner MDM maturity model to develop your MDM program?
- How can program managers manage their MDM programs for success?

*Andrew White, Vice President*

**B2. Data Warehousing, Data Services, the Information Infrastructure and MDM**

The logical and physical requirements to deploy data governance are often deployed with an end use in mind. Even the much vaunted "single version of the truth" in the data warehouse is built with an end goal. Converting lessons learned from data integration and data management practices in applications can be abstracted to create both logical governance and physical infrastructure support. This presentation explains how to leverage existing practices in data management to support MDM.

- What is the expected affinity between logical management practices and physical data stores?
- How do I leverage what went right and what went wrong in data integration efforts?
- How do data integration best practices evolve into MDM services?

*Mark A. Beyer, Vice President*

# Session Descriptions

## **B3a. Evolving From MDM of Product Data to Multidomain MDM**

MDM of product data enables organizations to create and maintain a single view of the product and remains one of the top focus areas within MDM. This presentation provides a state-of-the-nation status check for MDM and goes on to discuss how technologies, best practices and the vendor marketplace will evolve over the next few years. The research finishes with scenarios for how organizations that have invested in MDM of product data could evolve to a multidomain, multi-use-case MDM capability.

- What has been achieved so far with MDM of product data?
- How will MDM of product data market, technologies and best practices evolve?
- How will organizations evolve from single-domain MDM to multidomain, multi-use-case MDM?

*Andrew White, Vice President*

## **B3b. Evolving From MDM of Customer Data to Multidomain MDM**

MDM of customer data helps organizations create and maintain a single view of the customer and remains one of the top focus areas within MDM. This presentation provides a state-of-the-nation status check for MDM of customer data, goes on to discuss how technologies, best practices and the vendor marketplace will evolve over the next few years and finishes with scenarios for how organizations that have invested in MDM of customer data could evolve to a multidomain MDM capability.

- What has been achieved so far with MDM of customer data?
- How will MDM of customer data technologies and best practices evolve?
- How will the MDM of customer data market evolve and which vendors will win?
- How will organizations evolve from single-domain MDM to multidomain MDM?

*John Radcliffe, Vice President*

## **B5. Interactive Great Debate: Analytical MDM vs. Operational MDM**

This analyst panel explores the differences, and similarities, between operational MDM and analytical MDM. The debate will explore how to create a shared environment of master data across business applications, business intelligence, enterprise information architecture and performance management domains—most likely from a people, process and technology perspective. Come hear Gartner analysts Andrew White and Mark Beyer face off over how MDM is being adopted—and abused—in operational and analytical environments as they each fight for your vote on which is best for you: operational MDM or analytical MDM?

- What are operational MDM and analytical MDM; what are the differences and similarities?
- How do you figure out which “use case” of MDM is right for you?
- How should MDM support your business processes, applications, intelligence, architecture and performance management programs?

*Mark A. Beyer, Vice President*

*Kurt Schlegel, Vice President*

*Andrew White, Vice President*

## **B6. A Difficult Time For Software and MDM: What Does 2010 Hold, and Is the Worst Behind Us?**

The market discontinuities that emerged in 2008 have created a difficult procurement and selling environment. This session explores the current and future dynamics and opportunities within software and for the master data management market. This session will focus on market taxonomies, vendor revenue market landscape, market forecast and the business trends in the software industry that are affecting the market.

- How is the current economic environment driving and inhibiting markets today and in the future?
- What are the megatrends that affect this market in relationship to the total software markets and master data management?
- What might the market look like by 2013?

*Charles M. Eschinger, Director*

## **B7. Industries' Issues With MDM: Roving Internet (IAS) Reporting**

Industry differences abound across MDM—every industry differs in its view, and expectation, for MDM across many dimensions. This presentation explores business challenges, different dimensions and evolving solutions for how organizations in health care, banking and manufacturing cope with poor master data and process quality. Hear from three “remote” Gartner analysts in the field as they “call in” for a virtual extravaganza. Then test your ideas with an interactive Q&A with our intrepid “reporters.”

- How does MDM differ across industries?
- What patterns exist that can be leveraged across industries?
- How are organizations in healthcare, banking and manufacturing coping with—and without—MDM?

*John Radcliffe, Vice President*

*Andrew White, Vice President*

## **B9. How to Use Master Data for Content Control, Consistency and Compliance**

For most end users and business processes, master data is an unknown concept. What is important to them is unstructured information—that which is contained in Office files, e-mail and content management systems. Yet IT pays virtually no attention to this all-important business content beyond provisioning desktops, buying file shares and letting the users get on with it. There is an implicit assumption that the users themselves will sort out their own content while IT focuses on structured information systems such as ERP, SCM and CRM. It won't happen. Enterprise content management needs the discipline of master data management as much—or more—than the source of structured data. In this presentation, learn how to tie the unstructured 80% of your enterprise data into your master data management plans.

- How can structured and unstructured information be used together to create IT efficiency and business advantage?
- What is the current state of the art and best practice around master data in enterprise content management projects?
- When will technology convergence allow MDM and ECM to work together?

*Debra Logan, Vice President and Distinguished Analyst*

# Session Descriptions

## Track C

### Converge: Understanding How MDM Impacts So Many Other Things

#### **C1. Architecting for Participation: How Information Sharing Overcomes Information Silos**

The specialized practices of information management disciplines have led to a fundamental problem: siloed information management without holistic information design. We offer a radically different approach. Enterprise information architecture focuses the fragmented disciplines on the goal of increasing information value through the network effect: information shareability based on consistency, usability and extensibility.

- What is holistic design and the network effect of information shareability?
- How is the relationship between EIA and management disciplines such as EIM and MDM?
- Which best practices deliver the most results?

*David Newman, Vice President*

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#### **C2. Enterprise Information Management 2010**

Organizations are showing more and more interest in the topic of enterprise information management. The benefits of holistic information management are clear: complete and trustworthy information allows business leaders to make better decisions, faster. The perils of fragmented information management—unnecessary cost, risk and loss of productivity—are equally clear. Some organizations are becoming more mature in their ability to manage information across the enterprise. This presentation will allow you to assess the “state of the art” of EIM and help you start or continue your own EIM journey.

- How can business determine which information assets should be shared in an EIM program?
- What organizational structures, roles and governance processes are needed to make EIM a reality?
- How mature is EIM as a discipline and what best practices have emerged from existing EIM programs?

*Debra Logan, Vice President and Distinguished Analyst*

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#### **C5. Metadata Management From an MDM Perspective**

The IT industry has heard for years that metadata is critical to managing information and IT assets, including master data across MDM suites. Metadata demands aggressive and comprehensive management and that introduces significant issues for the stewardship and governance team. Technologies such as metadata repositories are key to addressing these issues. This session examines metadata management from an MDM perspective.

- What is metadata and why is it critical to managing information assets?
- What approaches are organizations taking to managing the opportunities and threats of metadata as part of MDM initiatives?
- Which vendors and technologies are organizations using to manage MDM metadata?

*Michael Blechar, Vice President*

## C6. Relating MDM to the Application and Business Architectures of the Future

Business process improvement and management (BPI/BPM) initiatives and service-oriented architecture (SOA) development projects expecting to improve process and application agility require well-designed, proven, agile data services. Application and business architects can wait until design time to try to identify needed data services or they can turn to master data management (MDM) initiatives proactively, “pre-build” them before they are needed and resolve time-consuming governance issues beforehand.

- What effect does SOA, BPM and the next generation of content-driven solutions have on the agility and management of the information architecture?
- How will organizations leverage the ability of MDM disciplines to capture and track data rules and specifications for the next generation of process and content?
- What must organizations do in terms of transitioning people, process and technology to be able to ensure adequate levels of information agility for the future solution architecture and infrastructure?

*Michael Blechar, Vice President*

## C7. Best Practices for Ensuring Optimal Master Data Quality

The discipline of master data management (MDM) includes data quality as an implicit focus, but an MDM initiative that does not take early, constant and significant explicit action to address data quality issues will fail. This session focuses on the importance of data quality competence in MDM efforts, and explores strategies for how to best align resources and implement controls to deliver lasting improvements in data quality.

- What is data quality, and where do data quality issues create the greatest risk for MDM?
- Why is quality of master data a business issue, and what role do people and process play in data quality improvement?
- What is the state of data quality technology, and how will the market for data quality tools evolve?

*Ted Friedman, Vice President and Distinguished Analyst*

## C9. Data Integration Technology and Architecture: Infrastructure for Efficient and Effective Master Data Delivery

Solid practices and technology for data integration are required to achieve reliable consolidation, synchronization and delivery of master data throughout the enterprise. Data integration architectures, tools and markets are morphing as they become integral functions in an enterprise’s information infrastructure in support of MDM and other critical initiatives.

- Why is data integration critical to MDM success, and where do data integration techniques and technologies directly address MDM requirements?
- How are leading organizations effectively deploying data integration capabilities in support of MDM and beyond?
- What is the state of data integration technology, and how will the data integration tools market evolve?

*Ted Friedman, Vice President and Distinguished Analyst*

# Session Descriptions

## Analyst-user roundtables

### **AUR1. Enabling AD, SOA and MDM Collaboration**

Information management cannot be done in a vacuum, especially when the business organizations and developers are using service-oriented paradigms for designing and implementing business processes, applications and data. Here we look at the best practices for collaboration between those doing MDM, BPM and SODA.

*Michael Blechar, Vice President*

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### **AUR2. Reconciling Operational and Analytical Master Data Management**

In this session, attendees will discuss their operational and analytical MDM deployments and whether they can and should be better integrated.

*Kurt Schlegel, Vice President*

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### **AUR3. Embedding MDM in EIM and Your Information Architecture**

This session is a forum for exchanging ideas and lessons learned when building information-sharing environments. It will focus on how EIA's goal of designing enterprise information and EIM's goal of managing enterprise information can increase the success of information management efforts, such as MDM.

*David Newman, Vice President*

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### **AUR4. Experiences in Data Quality Improvement: What Works and What Doesn't**

Learn from the experiences of your peers focusing on various data quality challenges in their MDM efforts

*Ted Friedman, Vice President and Distinguished Analyst*

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### **AUR5. Best Practices in Engaging and Using External Service Providers**

This roundtable will feature an attendee discussion of lessons learned and best practices for MDM projects where external service providers are important and approaches that have led to success.

*Alex Soejarto, Research Vice President*

*Bill Swanton, AMR Vice President and Research Fellow*

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### **AUR6. To be determined by attendee poll**

This roundtable will address attendee issues. The topic will be determined by a poll from attendees to ensure the most relevant experience.

## Tutorial

### TUT1. Tutorial MDM Concepts and Introduction

Master data is the core data that links together and integrates an organization's business processes, application and information systems. Without a "single view of the truth" that is shared across the enterprise, it is difficult to see how operational and analytical processes can be fully effective. This tutorial provides you with an introduction to MDM—what it is and why it is so important. It also explores what MDM should look like in different organizations and discusses best practices, ending with a discussion of the technologies and tools to enable MDM.

- What is MDM, why is it important and how does it add value to the business and major IT initiatives?
- What should MDM look like in your organization?
- What best practices will help you succeed with MDM?
- How can technology vendors and tools help achieve MDM?

*Andrew White, Vice President*

*John Radcliffe, Vice President*

## Workshops

### W1. Building a Business Case (Beginners)

The workshop explains what business executives are looking for in the MDM business case. It also describes the process and provides the tools for delivering these requirements.

*Michael Smith, Vice President*

*Bill Swanton, AMR Vice President and Research Fellow*

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### W2. Barriers to MDM and How to Get Over Them (Beginners and Intermediate)

Users report all kinds of barriers that have slowed down their MDM programs. These barriers span many different parts of the business, and may include people, process or technology. This workshop will introduce a template of barriers that we have seen from our user interactions. Attendees will use this template to discuss whether they apply to their organizations, and what others exist. Gartner analysts will lead attendees in sharing ideas on how to get past such barriers.

*Debra Logan, Vice President and Distinguished Analyst*

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### W3. The Realities of MDM Deployment

Successful implementation of MDM promises the much sought-after integrative collaboration of business and IT to achieve a single "version of the truth." Nevertheless, MDM deployments present their own unique challenges. They are technically complex, organizationally challenging and politically sensitive. Organizations often lack a cohesive plan that can help them navigate the complex dynamics involved. Participants in this workshop will apply the MDM Summit concepts to assess the maturity of their efforts and determine the immediate steps they must take to develop a practical and actionable plan to guide their MDM deployment.

*Dimitris Geragas, Director Consulting*

The header graphic features a blue background on the right with a white horizontal line under the title. On the left, there is an orange vertical band with a white gear icon. In the top right corner, there is a faint image of a financial spreadsheet with columns for months and values.

# Session Descriptions

## **W4. MDM As an Enabler for BI and Performance Management**

This interactive workshop will look at MDM from a BI, performance management and analytics perspective and will include discussion of analytical MDM. Attendees will be encouraged to engage with their peers in other organizations and drill down into the subject with moderation and input from Gartner analysts.

*John Radcliffe, Vice President*

*Kurt Schlegel, Vice President*

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## **W5. Governance and Organization (Advanced)**

This interactive workshop will look at the status of governance of master data. Beginning with coming up with a group definition of “governance,” the session will explore the barriers that have made such governance hard to establish or maintain and how they can be overcome, encouraging a free exchange of ideas. Gartner analysts will moderate the session and add their own perspectives.

*Debra Logan, Vice President and Distinguished Analyst*

*Andrew White, Vice President*

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## **W6. Where is MDM Going? Where Does It Need to Go? (Advanced)**

This interactive workshop is for experienced MDM practitioners who already have multiple MDM deployment phases under their belt. It provides an opportunity to come together in a networking environment to share ideas about where MDM is going: What are the gaps, what needs to evolve, what is missing? Gartner analysts will moderate the session and add their own perspectives.

*John Radcliffe, Vice President*

*Charles M. Eschinger, Director*

# Solution Showcase

## Solution Provider Showcase

Developing successful MDM initiatives means selecting technologies that match your needs. But with time in short supply, what's the most efficient way to acquire the product and market knowledge for sound decision making? Our Solution Provider Showcase.

- Get a handle on what's available in today's market, from megavendors to best-of-breed specialists.
- Schedule private solution briefings to discuss your organization's specific requirements.
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IBM MDM delivers a single version of truth of an organization's critical data helping them produce better business outcomes and minimize cost and risk. IBM MDM makes it easy to manage, share and analyze master data to support a wide set of business requirements where trusted data is required.



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# Registration

## Three easy ways to register

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## Pricing

### Gartner Master Data Management Summit

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Standard price: \$2,095      Public sector price: \$1,695

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Teams that attend a Gartner Summit together gain a richer experience, so we've designed discounts for teams of three members or more. Go to registration and pricing at [gartner.com/us/mdm](http://gartner.com/us/mdm) to find out more.

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We have reserved a limited block of rooms for summit attendees. To obtain the special Gartner rate, be sure to make your hotel accommodations prior to March 19 and inform the hotel you are attending the Gartner Master Data Management Summit. Visit [gartner.com/us/mdm](http://gartner.com/us/mdm) for additional information.

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# Five reasons to attend

- 1 All three topics are hot CIO priorities
- 2 MDM and BI are core components of your information architecture
- 3 EA, BI and MDM are all critical to aligning your business and IT
- 4 You can evaluate all BI, MDM and EA vendors in one place
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