

Inside
Real-life MDM scenarios

Gartner Master Data Management Summit 2009

Early-Bird Savings

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Guest Keynote



Jason Jennings
Business Thought Leader
and Best-Selling Author

Conference Co-Chairs



John Radcliffe
Research Vice President



Andrew White
Research Vice President

**Putting All the
Pieces Together.
Get the Complete
Picture With MDM.**

Gartner
Master Data
Management
Summit 2009

October 5 – 7
Los Angeles, CA
gartner.com/us/mdm

MDM Strategy, Implementation and Technology: Putting All the Pieces Together in One Place

When it comes to customers, products, suppliers, locations and even employees, does your enterprise have the complete picture?

Plenty of businesses invest money and resources trying to integrate, organize and manage data. Yet too often they become overwhelmed by it. Their efforts result in fragmented views, siloed information and missed opportunities. This incoherent vision can ultimately damage competitiveness and increase IT and business costs. In today's economic climate is that a risk worth taking?

Don't hedge your bets.

It's time to put all the pieces together and take control of your master data.

Attend the Gartner Master Data Management Summit from October 5 – 7, in Los Angeles, CA.

By not being able to sustain a single view of its critical data assets, your enterprise may be putting sound decision making in jeopardy. What's the solution? Embracing and implementing truly effective MDM initiatives. Once that's done your organization can end the debate about whose data is right and improve its decision making.

Our comprehensive best practices approach to MDM strategy and implementation, plus the enabling technology, delivers what you need to start new initiatives or take an existing MDM program to the next level. Whether you're interested in first steps or next steps, you'll find conference content that's rich in industry best practices that you can leverage.

With the very best in actionable tactics, strategic overviews, insightful case studies and marketplace briefings, you'll gain substantive knowledge on how to:

- **Craft** a persuasive MDM business case that is sure to get business buy-in.
- **Ensure** your first-time MDM initiatives are on the right track.
- **Choose** the best vendors and technologies to create a single view of customers, products and suppliers.
- **Understand** and prepare for MDM's impact on your applications portfolio and information infrastructure.
- **Create** a governance framework and organizational structure to enable MDM.
- **Advance** your existing MDM program to the next level.

Plus, you'll get a "state of the nation" view of MDM of customer data, product data and procurement.

Keep in mind that the Master Data Management Summit isn't just about the present-day challenges of cost optimization. Making smart decisions with MDM now can lay the foundation for future growth.

But you need to move forward quickly. Let our team of analysts help you put all the pieces together for MDM success.



Benefits of Attending

What to Expect at the Master Data Management Summit

The right level of insight, analysis and advice to meet your needs

Are you looking to:

- **Create** a single view of the truth to enable your service-oriented architecture strategy?
- **Develop** a comprehensive strategy to share master data across channels and business partners?
- **Build** the business case for your first MDM project and gain stakeholder support?

Get ready to:

- **Determine** how an MDM program fits into your overall enterprise information architecture.
- **Develop** MDM strategies that meet short-term cost optimization goals and build an MDM platform for the future.
- **Understand** the range of tools and technologies that enable MDM to work efficiently and effectively.
- **Address** the organizational challenges that block MDM success.
- **Create** an MDM governance framework to suit your organization.
- **Establish** the right metrics before your MDM program takes off.
- **See** why your MDM initiative should be strongly aligned with delivering business value and not seen as just another IT infrastructure project.
- **Learn** more about the four factors of MDM complexity—industry, domain, use case and implementation style—and how they're evolving.
- **Understand** the relationship between MDM, data warehousing, business intelligence, business applications and performance management.

MDM Hot Topics we'll present this year:

- Where is MDM going in the future?
- Building a business case for your MDM initiative
- Creating a vision and strategy for MDM
- Learning and leveraging the right implementation styles
- How to measure success of MDM efforts
- Building the right organization for MDM
- Establishing a governance framework
- Leveraging MDM across business intelligence and performance management
- Aligning with enterprise information architecture
- Key trends shaping the market
- Customer data—"state of the nation" and future directions
- Product data—"state of the nation" and future directions
- MDM enabling cost optimization in procurement
- Integrating with service-oriented architecture
- Supporting an initiative with the right data quality tools
- How MDM relates to data warehousing
- Applying data quality to master data

What Makes Us Different?

Get 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.
- **Tutorials:** Complimentary pre-conference sessions get you up to speed on key issues and trends.
- **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:** A great way to network informally with your summit colleagues at the end of the day.
- **Analyst/User Roundtables:** Small interactive peer exchange sessions addressing your MDM challenges.
- **End-User Case Study Sessions:** Hear firsthand from those who have implemented MDM initiatives.

Plus:

- 12 Gartner analysts on-site
- Three tracks and more than 30 sessions addressing your organization's MDM maturity level
- Magic Quadrant power session
- Gartner MDM Excellence Award Program
- Extensive networking opportunities with your peers

Attention IT and business decision makers

With the summit's in-depth, best-practice approach, both IT executives and their business counterparts will see what it takes to plan, implement and govern a holistic MDM program that adds value to the business. See page 11 for our special team registration discounts.

Who should attend

- IT senior executives—CIO, vice president
- IT managers involved in MDM
- Enterprise and solution architects
- MDM, customer data integration and product information management project and program managers
- Sales, marketing, service, manufacturing, operations, procurement and supply chain executives seeking a single view of products, customers, assets, suppliers and resources
- Business application managers—ERP, CRM, supply chain management, product life-cycle management and procurement
- Information managers and architects
- Application architects—ERP, CRM, supply chain management, product life-cycle management and procurement
- Data and data model architects
- Application development and integration managers
- Business intelligence and performance management leaders
- Business analysts and systems analysts

Creating Business Value: Real-Life MDM Scenarios

Here are just a few master data management issues that have affected real companies like yours:

Scenario 1: Reduced operational costs

A midsize automobile manufacturer is experiencing eroding margins and an increase in both materials costs and logistics charges. With the company's survival at stake, cutting costs is a given, yet existing reporting structures reveal little about where reductions can be made safely, how processes can be streamlined and which relationships can be leveraged.

Solution

MDM for procurement offers a single view of suppliers and materials, demystifying in real time the scale of relationships on the supply side of the business.

See sessions B5, B7, B8, C2.

Scenario 2: 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 blew up into a huge embarrassment; a new product recently launched was found to contain materials that are illegal, and while the retailer followed procedures to recall the product and compensate consumers, the story did not die, due to the negative press.

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.

See sessions B4, B5, B7, B8.

Scenario 3: Increased revenue and growth

A large healthcare organization is losing revenue to competitors due to poor customer centricity, a direct result of growth through acquisition. Without an accurate single view of the entire customer base, upselling, cross-selling and upgrading opportunities were being wasted. Even worse, existing customers were being mistakenly identified as new prospects.

Solution

MDM of customer data synchronizes customer and account data across all sources and systems to support accurate marketing analysis as well as customer-facing sales teams and processes.

See sessions B2, B4, B7.

For more MDM scenarios, visit gartner.com/us/mdm.

Get your MDM initiatives on the right track now

Over the next four years, 50% of MDM programs may fail, due to the lack of a business-oriented approach, appropriate governance and metrics.

Get the complete picture: put all the pieces of MDM together

The summit's business-driven agenda provides an in-depth view of how MDM programs are moving into multiple domains, gaining real-time integration with business applications and providing more support for smarter business decision making related to cost savings, operational efficiencies, growth opportunities, customer service, compliance and risk management.

Meet the Keynote Speakers

Guest Keynote Speakers

A New Kind of Leader: Tactics, Strategies & Economic Value Revealed From Top-Performing Business Leaders

Tuesday, October 6, 9:15 a.m.

Jason Jennings, a prolific business and leadership author of *Hit the Ground Running: A Manual for New Leaders*, builds a case for a new kind of leader who can create lasting economic value.



Jason Jennings,
Business Thought Leader
and Best-Selling Author

MDM Excellence Award Finalists Presentation

Wednesday, October 7, 8:00 a.m.

Three MDM Excellence Award finalist organizations will present their accomplishments of world-class MDM initiatives in seven key areas: vision, strategy, metrics, governance, organization, processes and technology infrastructure.

Gartner Keynote Speakers

Gartner Opening Keynote: MDM Scenario How MDM Will Evolve Through 2014

Monday, October 5, 9:15 a.m.

MDM adoption continues to grow and is increasingly accepted as a key, unifying initiative that enables organizations to meet their objectives in running, growing and transforming their businesses. In this MDM scenario we take a brief status check on where MDM is today. What has been achieved and what remains to be done. Then we explore where MDM is going in the future in terms of technology, best practices and the market and vendor landscape.



John Radcliffe,
Research
Vice President



Andrew White,
Research
Vice President

Magic Quadrant Power Session for MDM and Associated Technologies

Mark Beyer, Research Vice President
Ted Friedman, Vice President and Distinguished Analyst
John Radcliffe, Research Vice President
Andrew White, Research Vice President

Tuesday, October 6, 8:00 a.m.

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.

Gartner Town Hall

John Radcliffe, Research Vice President
Andrew White, Research Vice President

Wednesday, October 7, 11:45 a.m.

This 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 who will answer questions from attendees.

Meet the Gartner Analysts

For more than 25 years, Gartner analysts have been the trusted advisors to many of the world's largest and most demanding organizations. Gartner analysts draw constantly from the 200,000 one-to-one inquiries about real-life challenges they answer every year.



Mark Beyer
Research Vice
President

Focus areas: Data Management and Integration, Application Development and Integration



Michael Blechar
Vice President
and Distinguished
Analyst

Focus areas: Service-Oriented Development of Applications (SODA), Application and Information Architecture, Metadata Management



Charles Eschinger
Research Director

Focus areas: ERP and Supply Chain Management, Software Markets



Ted Friedman
Vice President
and Distinguished
Analyst

Focus areas: Data Integration, Data Quality, Information Governance



Debra Logan
Vice President
and Distinguished
Analyst

Focus areas: Enterprise Information Management, Governance, Risk and Compliance (E-Discovery)



David Newman
Research Vice
President

Focus area: Enterprise Architecture



John Radcliffe
Research Vice
President

Focus areas: Master Data Management, Customer Relationship Management



Kurt Schlegel
Research Vice
President

Focus areas: Business Intelligence and Performance Management, BI Platform Standardization, Business Intelligence Competency Centers



Michael Smith
Research Vice
President

Focus area: IT Management



John Van Decker
Research Vice
President

Focus areas: Cross Industries, Business Intelligence, ERP and Supply Chain Management, Regulatory Compliance



Andrew White
Research Vice
President

Focus areas: Master Data Management, Business Applications and Process



Deborah Wilson
Research Director

Focus areas: E-Procurement/Procure-to-Pay, Sourcing Application Suites, Contract Management Applications, Supplier Performance Management

Gartner Analyst One-on-Ones

Sit down privately for 30 minutes with a Gartner analyst and get targeted advice on your MDM concerns and issues. Visit gartner.com/us/mdm for details on how to schedule your One-on-One.

Analyst/User Roundtables

Expect a lively exchange of information and ideas with your peers at these informal sessions moderated by a Gartner analyst. Expand your perspective and make valuable connections with peers across industries as you discuss today's top MDM trends.

Join Us for the Second Annual Gartner MDM Excellence Award



The Gartner MDM Excellence Award recognizes the accomplishments of world-class MDM initiatives in seven key areas: vision, strategy, metrics, governance, organization, processes and technology infrastructure. Is your MDM initiative a winner? The deadline for entries is **August 17, 2009**. Three finalists will be selected to present their MDM case studies to the conference attendees, who will then choose the winner by voting on which of the finalists demonstrated the best example of MDM excellence. For details regarding submissions, go to gartner.com/us/mdm.

A value-driven agenda for both IT and business leaders

The 2009 agenda explores the key trends, best practices, people and process and technology issues that will help determine the success of MDM initiatives for this year and beyond. Conference content is specifically designed to meet the needs for organizations at all stages of MDM initiatives, from beginning to intermediate and advanced. Interact with the Gartner team of MDM analysts, network with business and IT peers, and leave with an MDM action plan customized to your organization's needs.

A

MDM Strategies and Best Practices

Successful MDM programs are business-driven and cover all the necessary bases. Building on industry best practices, this track will provide a framework and drill-down content that you can use to achieve success.

B

MDM in Practice—Different Use Cases and Data Domains

Winning MDM strategies require long-term vision, but also have to reconcile with current real-world situations—meeting short-term cost optimization goals. This track will highlight and explore the critical implementation design, use cases and domain-related decisions that users are making today to meet short-term cost optimization goals and build an MDM platform for the future.

C

MDM Architecture and Technology

A range of technologies enables MDM to work both efficiently and effectively. Organizations may already have invested in many of the required components, and now must consider how to align, deploy and augment them to support MDM goals. This track will explore the relationship between MDM and the technology stack, the evolution of related technologies, and best practices in designing and implementing an architecture for MDM.

What does the future hold?

By 2013, MDM will have led to an 80% reduction in all costs associated with the elimination of redundant master data.

Why Gartner?

In challenging times it's more important than ever to build on your strengths and derive more value from every IT investment. Around the world and across industries, the largest and most effective organizations rely on Gartner for help making smart IT decisions at every level. Our analysts' role is to help you leverage technology for business advantage, whether you are focused on cost optimization now or positioning your organization for growth once the economy turns around.



Agenda at a Glance

To view conference session descriptions, go to gartner.com/us/mdm.

Monday, October 5


7:00 a.m.	Registration		
7:00 a.m.	Attendee Breakfast		
7:30 a.m.	Tutorial: MDM 101 Basics <i>John Radcliffe, Andrew White</i>	A Difficult Year For Software and MDM: Is the Worst Behind Us? <i>Charles Eschinger</i>	
9:00 a.m.	Opening Remarks and Agenda Overview <i>John Radcliffe, Andrew White</i>		
9:15 a.m.	Opening Keynote: MDM Scenario—How MDM will evolve through 2014? <i>John Radcliffe, Andrew White</i>		
	Track A: MDM Strategies and Best Practices	Track B: MDM in Practice—Different Use Cases and Data Domains	Track C: MDM Architecture and Technology
10:30 a.m.	A1. Seven Building Blocks of MDM—How to Ensure Success with MDM <i>John Radcliffe</i>	B1. The Complexities of MDM <i>Andrew White</i>	C1. Information Management Practitioners: The Enemy Is Us <i>David Newman</i>
11:45 a.m.	A2. How To Build the Business Case for MDM in a Tough Economy <i>Michael Smith</i>	B2. MDM of Customer Data Scenario: State of the Nation and What's Coming <i>John Radcliffe</i>	C2. Data Integration Technology and Architecture: Infrastructure for Efficient and Effective Master Data Delivery <i>Ted Friedman</i>
12:45 p.m.	Attendee Lunch and Solution Showcase Dessert Reception		
2:45 p.m.	A3. End-User Case Study	B3. End-User Case Study	C3. End-User Case Study
3:45 p.m.	Solution Provider Session	Solution Provider Session	Solution Provider Session
5:00 p.m.	A4. Creating a Winning Vision, Strategy and Road Map for MDM <i>John Radcliffe</i>	B4. MDM of Product Data Scenario: View from the Hill—Where Are We, and Where Are We going? <i>Andrew White</i>	C4. Using MDM To Enable Agility in Application and Business Architectures <i>Michael Blechar</i>
6:00 p.m.	Solution Showcase Reception		

Tuesday, October 6

7:00 a.m.	Registration		
7:00 a.m.	Networking Breakfast		
8:00 a.m.	Keynote: Magic Quadrant Power Session for MDM and Associated Technologies		
9:15 a.m.	Keynote: A New Kind of Leader—Tactics, Strategies and Economic Value Revealed From Top-Performing Business Leaders <i>Jason Jennings</i>		
10:30 a.m.	A5. Organizing for MDM: Stakeholders, Stewards and Change <i>John Radcliffe, Ted Friedman</i>	B5. Procurement MDM: Laying a Foundation for Sustainable Cost Savings <i>Debbie Wilson</i>	C5. Metadata Management From an MDM Perspective <i>Michael Blechar</i>
11:30 a.m.	Attendee Lunch and Solution Showcase Dessert Reception		
1:30 p.m.	Solution Provider Session	Solution Provider Session	Solution Provider Session
2:45 p.m.	A6. Panel: MDM Governance—Lessons Learned From Users <i>Debra Logan, David Newman</i>	B6. End-User Case Study	C6. End-User Case Study
3:45 p.m.	Solution Provider Session	Solution Provider Session	Solution Provider Session
5:00 p.m.	A7. Master Data Governance: Like IT Governance, Only Much Harder <i>Debra Logan, Andrew White</i>	B7. Data Quality Improvement for MDM Initiatives: Critical Competency For Trusted Master Data <i>Ted Friedman</i>	C7. Data Management Architectures for Integrated MDM <i>Mark Beyer</i>
6:00 p.m.	Solution Provider—Hospitality Suites		

Wednesday, October 7

7:00 a.m.	Networking Breakfast		
8:00 a.m.	Keynote: MDM Excellence Award Finalists Presentation		
9:30 a.m.	Solution Provider Session	Solution Provider Session	Solution Provider Session
10:15 a.m.	A8. Divide and Conquer: Orchestrating Your MDM Reference Architecture <i>Andrew White, Mark Beyer</i>	B8. The Impact of Business Intelligence and Performance Management on Your MDM Strategy <i>John Van Decker, Kurt Schlegel</i>	C8. How to Use Master Data for Content Control, Consistency and Compliance <i>Debra Logan</i>
11:30 a.m.	MDM Excellence Award Winner Announcement		
11:45 a.m.	Closing Keynote: Gartner Town Hall		

 = Cost optimization track

Build your own customized agenda online

Use our convenient Agenda Builder tool to create your own personalized summit schedule before the event. Go to gartner.com/us/mdm.

MDM 101 Basics

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

- What is MDM, why is it important and how does it add value to the business and to 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?

*John Radcliffe, Research Vice President
Andrew White, Research Vice President*

A Difficult Year for Software and MDM: 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 relation to the software market as a whole and to master data management?
- What might the market look like by 2013?

Charles Eschinger, Research Director



Track A: MDM Strategies and Best Practices

A1. Seven Building Blocks of MDM: How to Ensure Success With MDM

MDM program managers should use a business-driven, holistic framework to ensure that all the component parts of an MDM program are being addressed. Key to success is the need to strike the right balance between technology vs. governance and organizational issues, plus the need to ensure that the MDM program aligns with the business vision and that success can be measured through a set of metrics. 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 design processes and create the technology infrastructure necessary for MDM success?

John Radcliffe, Research Vice President

A2. How to Build the Business Case for MDM in a Tough Economy

The “new normal” resulting from the global recession has permanently altered the way business decisions are made. Business executives require fact-based proposals with quantifiable financial return for all investments. This presentation explains how to build the business case for MDM using a step-by-step methodology to increase the engagement between the IT department and the business in an MDM program, develop measurable, business-oriented KPIs, benchmark the current state and assign a business value to the “to-be” state.

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

Michael Smith, Research Vice President

A4. Creating a Winning Vision, Strategy and Road Map for MDM

It is important that the MDM initiative be seen as being strongly aligned with delivering business value, and not as an IT infrastructure project with no obvious benefits. The MDM vision has to be all about how MDM can enable the organization’s business vision. The MDM strategy is about how to make the MDM vision a reality and the use of an MDM maturity assessment is key to building the road map. This presentation will help you build that all-important MDM vision, strategy and road map, plus discuss best practices for a successful delivery.

- What should an MDM vision and strategy look like?
- How can organizations assess their MDM maturity and build a road map for their MDM program?
- What best practices should organizations leverage to successfully deliver their MDM program?

John Radcliffe, Research Vice President

Session Descriptions (cont.)

A5. Organizing for MDM: Stakeholders, Stewards and Change

MDM program managers face a number of challenges in the organizational area. The pressures for centralized control of master data will need to be balanced with the need for local flexibility to support business agility. A matrixed organization with clear roles and responsibilities, including the appointment of business colleagues as data stewards, will be necessary to operationalize the plan. Successful stakeholder management will be key to getting the program off the ground and consistently moving ahead. And the more ambitious the MDM program, the more change it will potentially demand. A well-planned and properly resourced change management program will have a large impact on success or failure.

- How will organizations balance the desire to centralize control of master data with the need for local flexibility?
- What will be the necessary organizational roles and responsibilities for MDM success?
- How can MDM program managers manage MDM stakeholders successfully?
- How can organizations perform effective change management with their MDM programs?

*John Radcliffe, Research Vice President
Ted Friedman, Vice President and Distinguished Analyst*

A6. Panel: MDM Governance Panel—Lessons Learned From Users

Governance is one of the distinguishing characteristics of MDM when compared with traditional system integration projects. Improving the degree of cooperation by the business community, especially in terms of stewardship, data quality and decision rights is critical. In this session, Gartner analysts moderate a panel of clients who will discuss steps to take to solve the unique governance challenges posed by MDM projects.

- What are the governance barriers typically found on MDM projects?
- How should these barriers be addressed?
- What lessons learned should enterprises apply to improve MDM governance processes?

*Debra Logan, Vice President and Distinguished Analyst
David Newman, Research Vice President*

A7. Master Data Governance: Like IT Governance, Only Much Harder

Governance of information is not a new idea, but the importance of governance to an MDM initiative continues to be critical—and fatal if missing or poorly implemented. This presentation defines governance of master data, shares the latest insights into organization structures and processes, and highlights best practices to help avoid pitfalls in implementing governance of master data.

- What is governance of master data and why is it so important?
- What are the best practices around governance of master data?
- What roles do IT and technology play in governance of master data?

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

A8. Divide and Conquer: Orchestrating Your MDM Reference Architecture

MDM is being implemented in different ways, and those differences are emerging across industry, use case, data domain and implementation style vectors. The technology and tools each enterprise has to orchestrate to support the discipline differs, however, based not only on these vectors, but also on where the enterprise begins its MDM journey. Every firm has a different technology stack, governance framework, and organizational/political structure—and this makes adopting MDM very hard. This research highlights some of the more common patterns we see in MDM, describing where enterprises start their MDM journey, and we map these to an MDM reference architecture. From here we explore the different paths and the associated costs and benefits for each, that you could take to achieve MDM.

- How can existing master data management practices be reconciled to an enterprise approach?
- What are the benefits and challenges of the various approaches to enterprise MDM?
- How do different tools fit into different enterprise MDM approaches?

*Mark Beyer, Research Vice President
Andrew White, Research Vice President*

Track B: MDM in Practice—Different Use Cases and Data Domains

B1. The Complexities of MDM

MDM is a simple concept, yet the simplicity masks a huge amount of complexity. Achieving and sustaining a single view of master data across the enterprise has been a longstanding desire for business leaders, to aid decision making and to help business performance. Every firm, however, starts its MDM journey from a different place, even if there is commonality in the end result. This session will explore the four vectors of complexity (industry, domain, use case and technology perspective) that describe MDM, and highlight how firms might alleviate some of the complexity.

- What are the four vectors of complexity that describe MDM, and how are they evolving?
- Where and how are enterprises starting their MDM journey?
- How will the vendors and segments of MDM evolve—will there be a “dominant” model?

Andrew White, Research Vice President

B2. MDM of Customer Data Scenario: State of the Nation and What’s Coming

MDM of customer data, formally known as customer data integration (CDI), helps organizations create and maintain a single view of the customer. This session provides a state-of-the-nation status check for MDM of customer data, goes on to discuss how technologies and best practices will evolve over the next few years and finishes with an analysis of the MDM of customer data market and vendors.

- 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?

John Radcliffe, Research Vice President

B4. MDM of Product Data Scenario: View From the Hill—Where Are We and Where Are We Going?

MDM for product data, formally product information management (PIM), provides a single view of product data across the enterprise, and has grown in importance both as a means to optimize cost and as a foundation for business growth with broad-based MDM. In the last year, MDM has continued to evolve; it has gotten more complex and sometimes more focused. At other times, it has become broader in scope. This session highlights what has happened with MDM of product data in the last year, explores where it is headed and reviews the vendors and technology.

- What has been achieved so far with MDM of product data?
- How will MDM of product data technologies and best practices evolve?
- How will the MDM of product data market evolve and which vendors will win?

Andrew White, Research Vice President

B5. Procurement MDM: Laying a Foundation for Sustainable Cost Savings

Agile, efficient organizations invest in infrastructure that supports ongoing cost management, especially in the procurement department. Learn in this session how procurement MDM can create a strong foundation for procurement processes for sustainable cost savings as well as how to avoid common pitfalls with this sometimes challenging technology.

- What are the primary process and technology enablers for sustained cost reduction?
- Why should organizations include spending analysis in their procurement MDM initiatives?
- How can organizations leverage procurement MDM to create a favorable environment for sustained cost savings?

Debbie Wilson, Research Director

Session Descriptions (cont.)

B7. Data Quality Improvement for MDM Initiatives: Critical Competency for Trusted Master Data

MDM includes data quality only as an implicit focus, but an MDM initiative that does not do this effectively will fail. This session will focus on the importance of data quality competence in MDM efforts, and explore 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 data quality 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

B8. The Impact of Business Intelligence and Performance Management on Your MDM Strategy

Leaders of BI and PM initiatives and leaders of MDM initiatives often work independently with different organizational teams, architectures, business cases and vendor partners. These leaders are missing an opportunity to tap the inherent synergies between the two initiatives, which share a common goal of driving the use of consistent, high quality data across the enterprise. This session will explore how MDM leaders can incorporate the BI and PM team's efforts to create a consistent and reliable set of dimensions and measures, traditionally used for reporting, analysis and planning, into their broader MDM strategy.

- What is the maturity of analytical MDM offerings from traditional MDM, BI and PM vendors?
- What is the role of the CFO in driving and leveraging MDM initiatives?
- How can a metrics framework be used to expand the scope of MDM beyond master data to include performance measures?

*John Van Decker, Research Vice President
Kurt Schlegel, Research Vice President*

Track C: MDM Architecture and Technology

C1. Information Management Practitioners: The Enemy Is Us

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

David Newman, Research Vice President

C2. 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.

- Where do data integration techniques and technologies add the most value in the broader context of MDM?
- What comes next in data integration adoption and technology?
- What is the state of the data integration tools market, and how will it evolve?

Ted Friedman, Vice President and Distinguished Analyst

C4. Using MDM to Enable Agility in Application and Business Architectures

Business process improvement and management initiatives and service-oriented development of application 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 turn to MDM initiatives to proactively “pre-build” them before they are needed and to resolve time-consuming governance issues beforehand.

- What effect do service-oriented architecture 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, and what best practices will they use to implement them in modeling tools, rules engines, software services, data services and stored procedures?
- What must organizations do in terms of transitioning people, process and technology to be able to ensure adequate levels of information agility for business process redesign initiatives as well as to create additional value-added opportunities through new types of content-driven solutions?

Michael Blechar, Vice President and Distinguished Analyst

C5. Metadata Management From an MDM Perspective

For years, the IT industry has heard 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 and Distinguished Analyst

C7. Data Management Architectures for Integrated MDM

SOAs require the guidance and stewardship provided by sound data management principles. MDM is one aspect of supporting data governance. Some of the most important lessons learned from data integration programs such as the data warehouse, data mart dimensionality and operational data stores don't make it into data management and governance practices simply due to IT organizational lines. In this presentation, learn how data integration programs yield fully vetted data management practices—and provide guidance on delivering master data services within your SOA.

- What are the data management lessons from data integration programs?
- Why are data stores still necessary in a services-oriented world?
- How do data integration best practices evolve into MDM services?

Mark Beyer, Research Vice President

C8. 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 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 and buying file shares. There is an implicit assumption that 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 as—or more than—the source of the structured data. In this session you will learn how to tie the unstructured 80% of your enterprise data into your master data management plans.

- What is unstructured information, and why is it important in an MDM context?
- 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?

Debra Logan, Vice President and Distinguished Analyst

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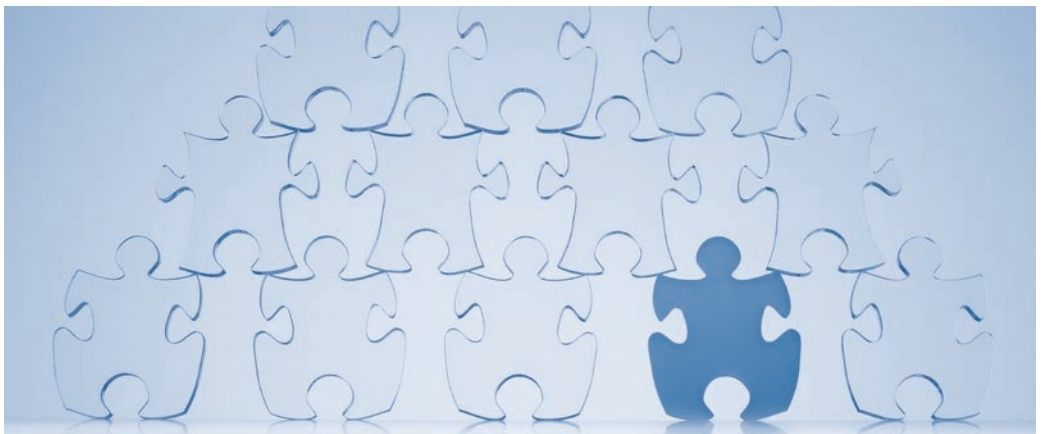
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