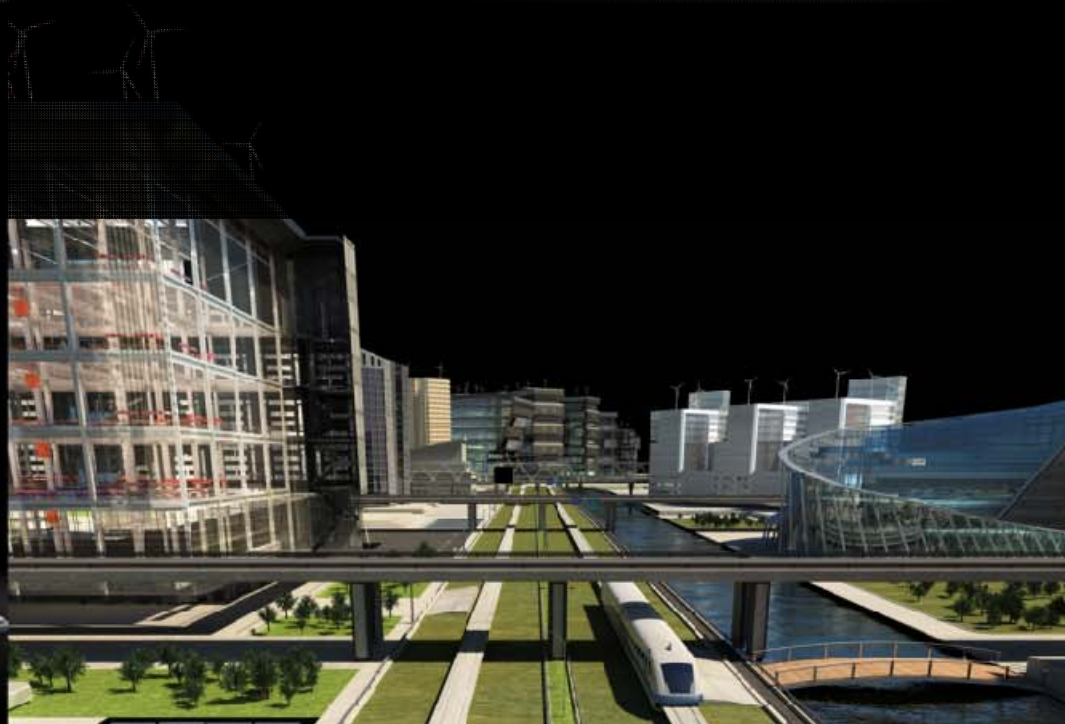




Methodology for Defining, Planning, and Implementing Customer Data Hub Solutions

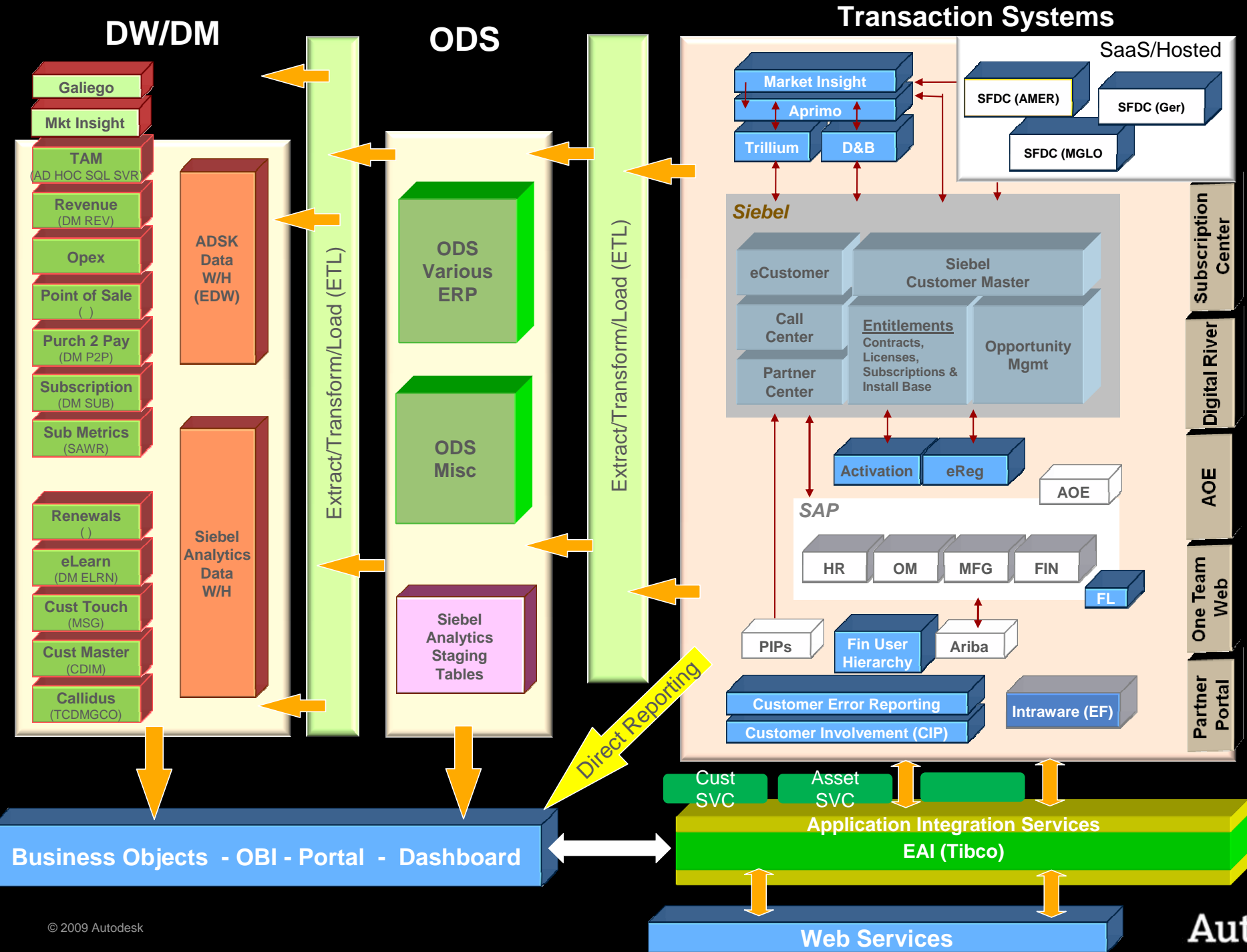
Paul Bertucci
December, 2009



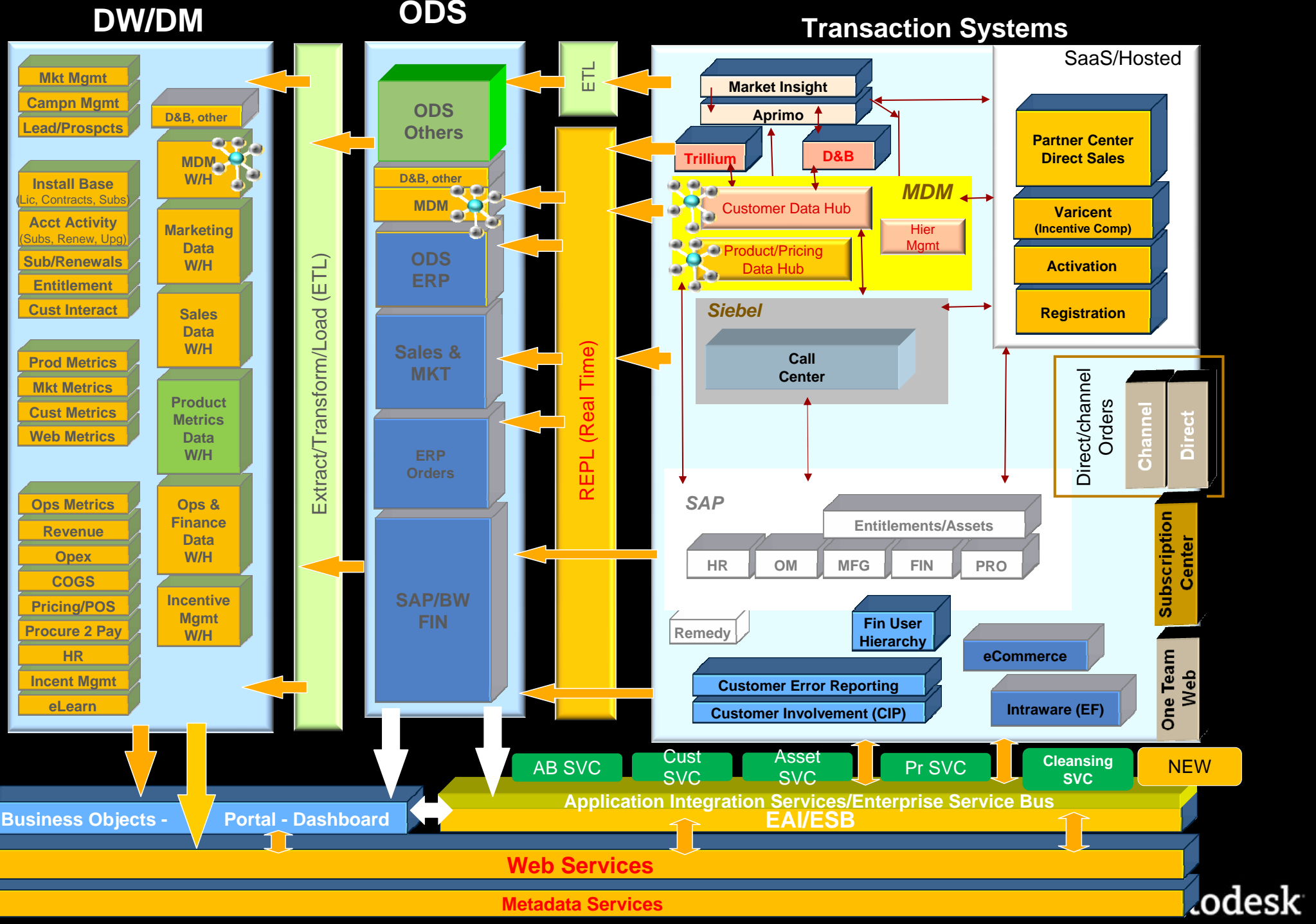
Agenda

1	Enterprise Systems & Customer
2	Customer Hub: Overview
3	Customer Hub Building Methodology (within a development lifecycle)
4	Customer Hub Implementation Methodology
	Q & A

Typical Architectural Landscape

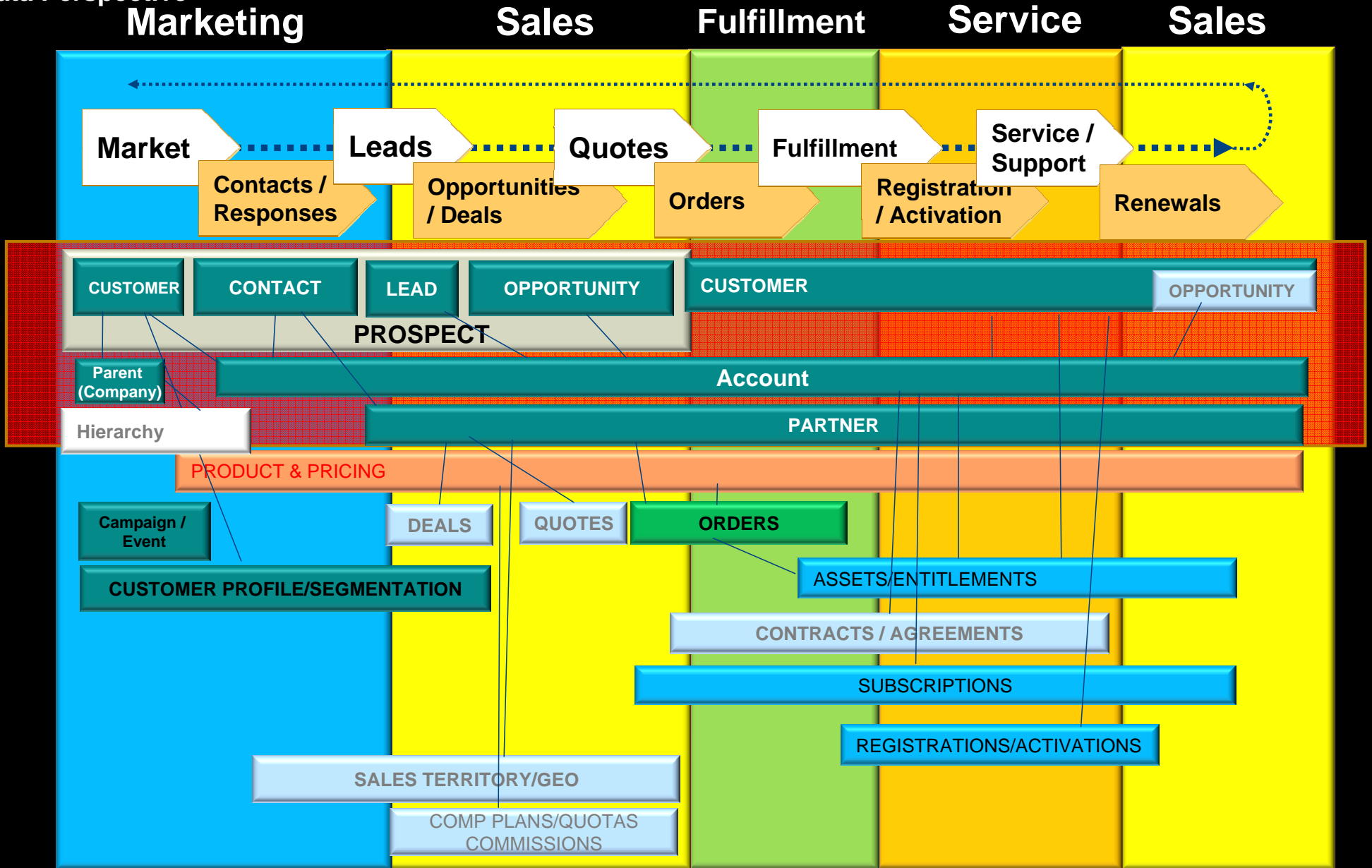


Evolved Architectural Landscape



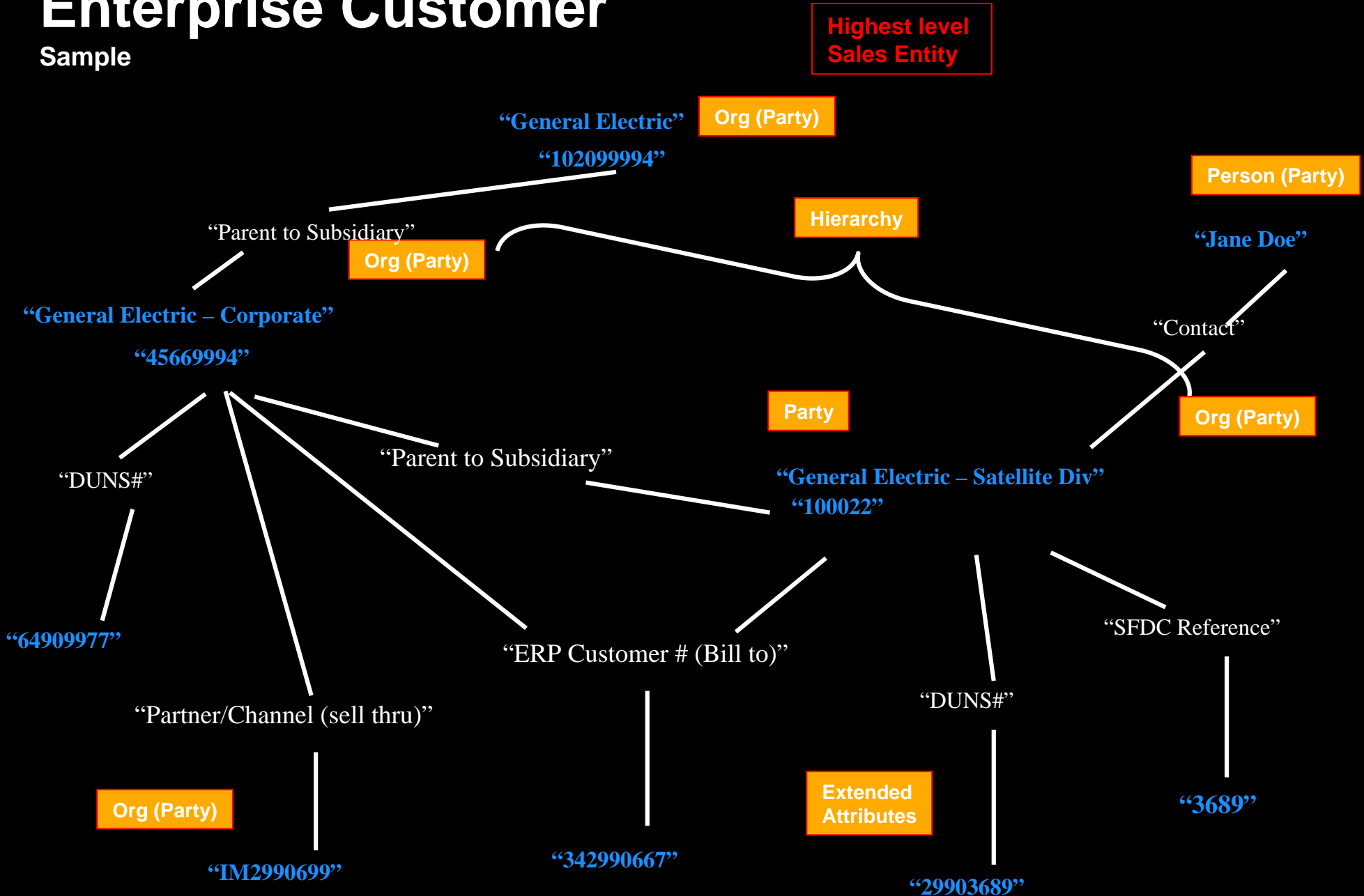
Business Processes & Systems

Data Perspective

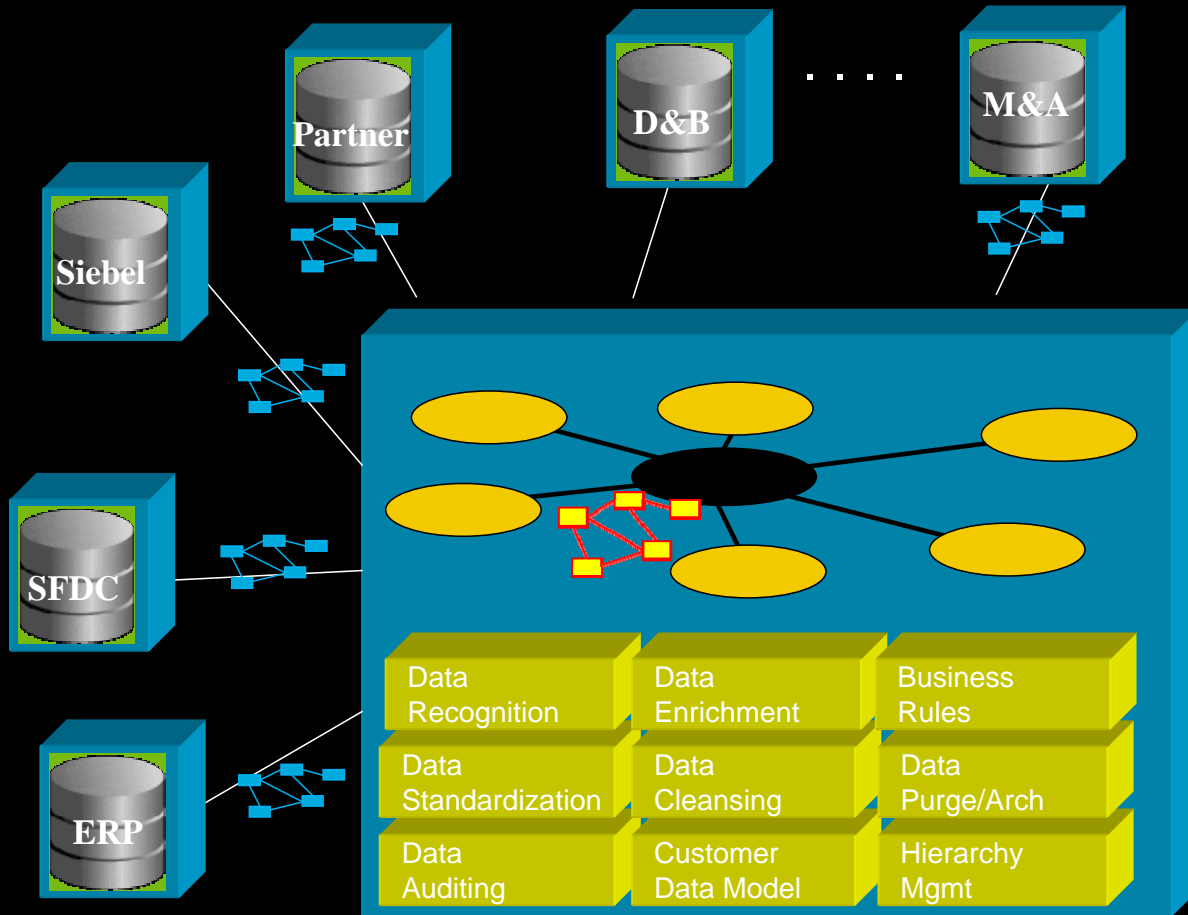


Enterprise Customer

Sample



Customer Hub: Overview



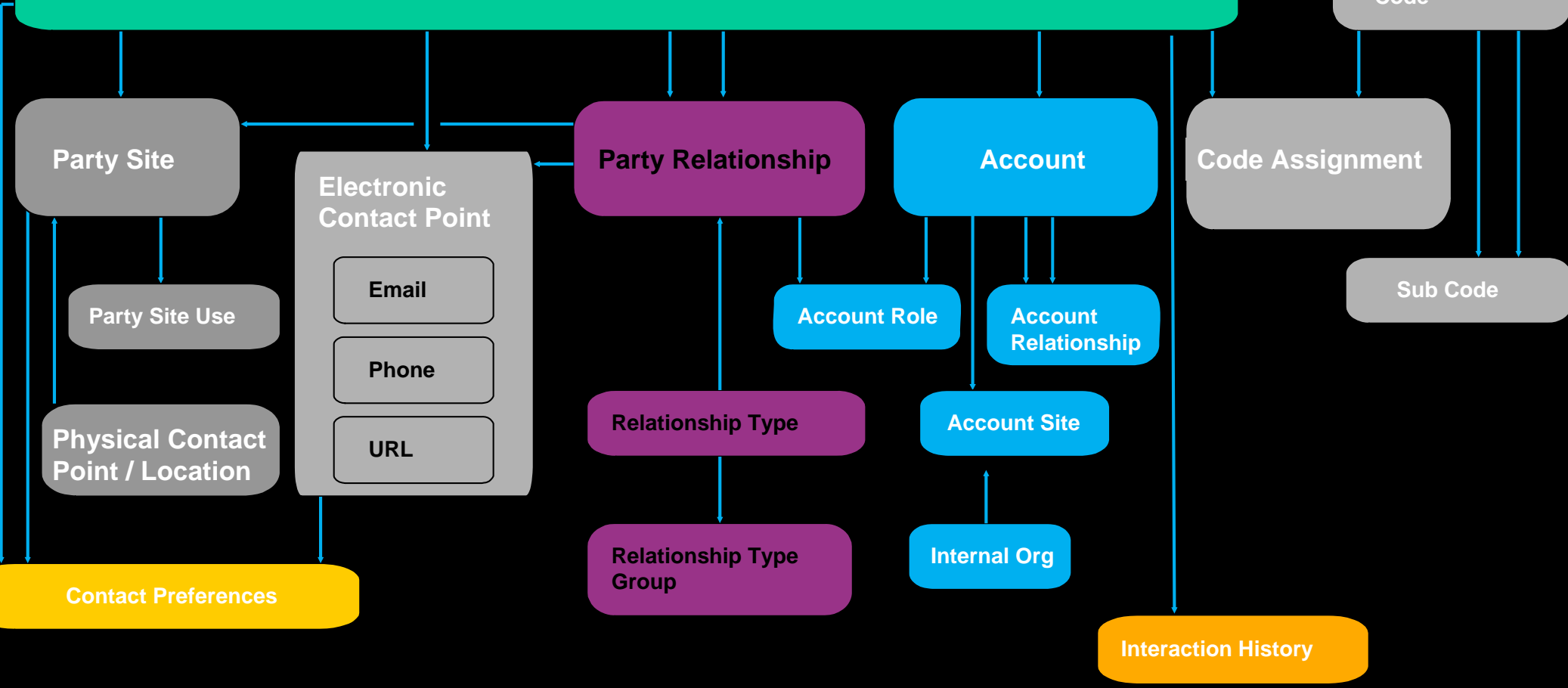
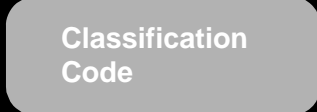
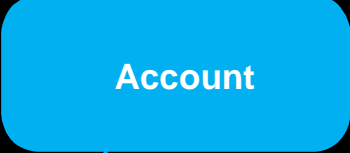
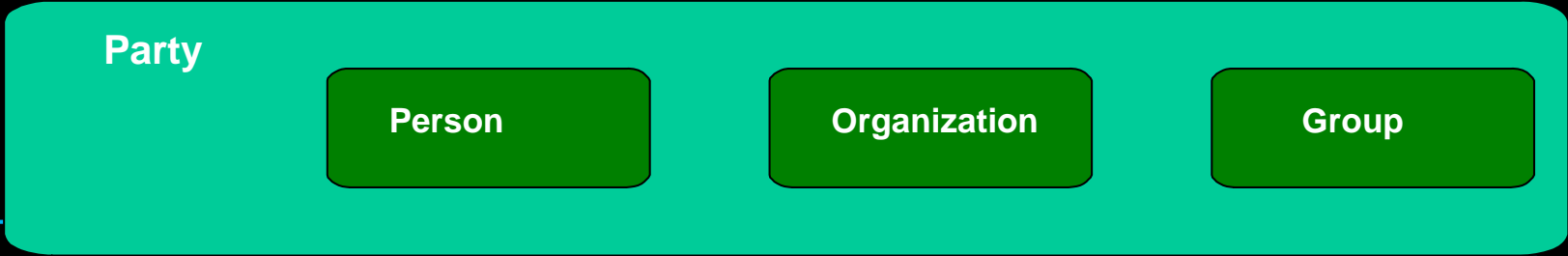
- Governed/Owned by the Business (steward)
- Technically enabled by IT (custodian)

Must have a Customer Identity Strategy !

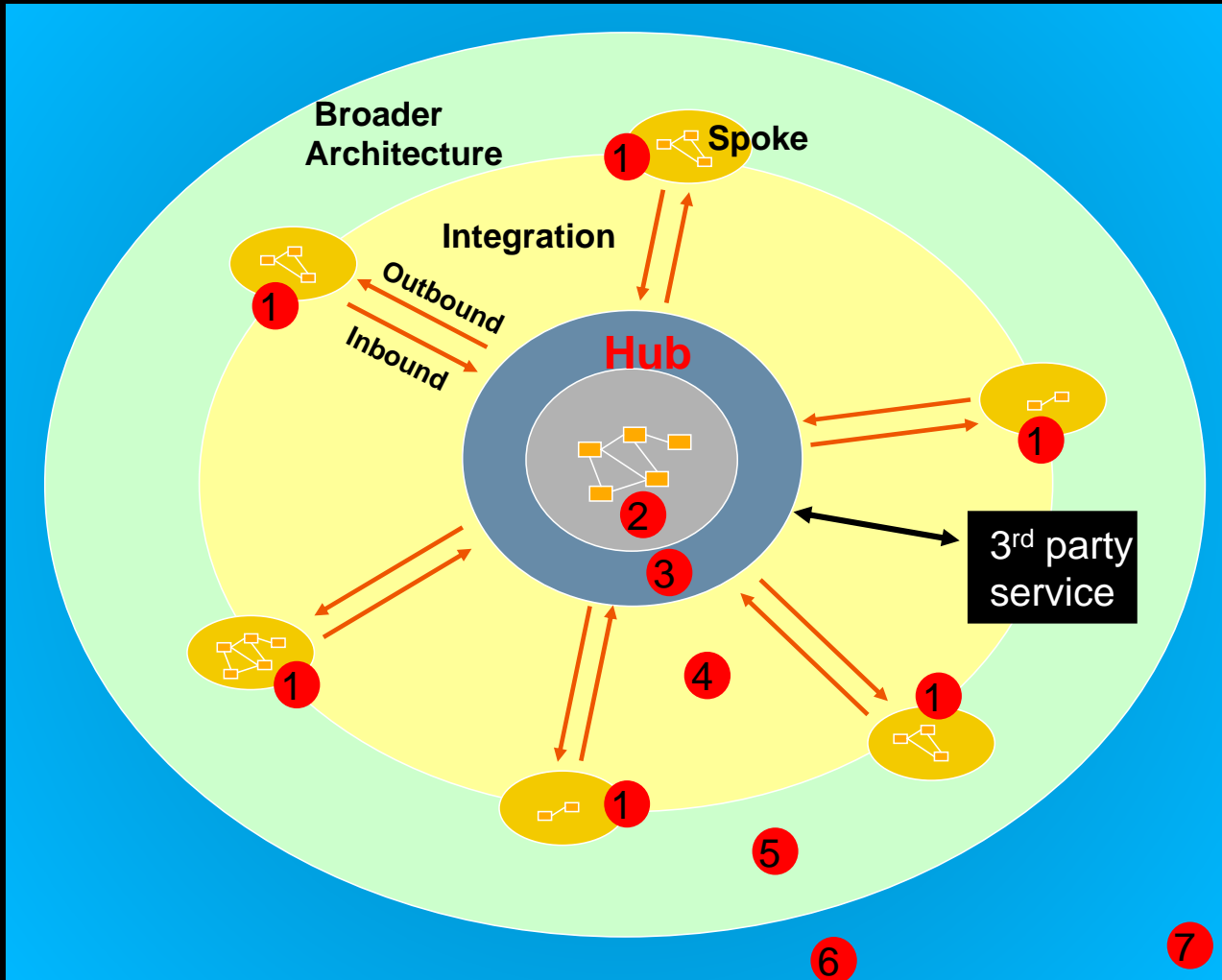
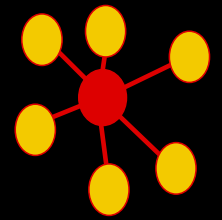


In simple terms

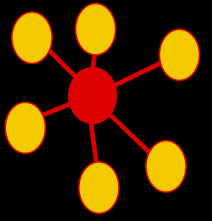
Sales Entity



Customer Hub Methodology

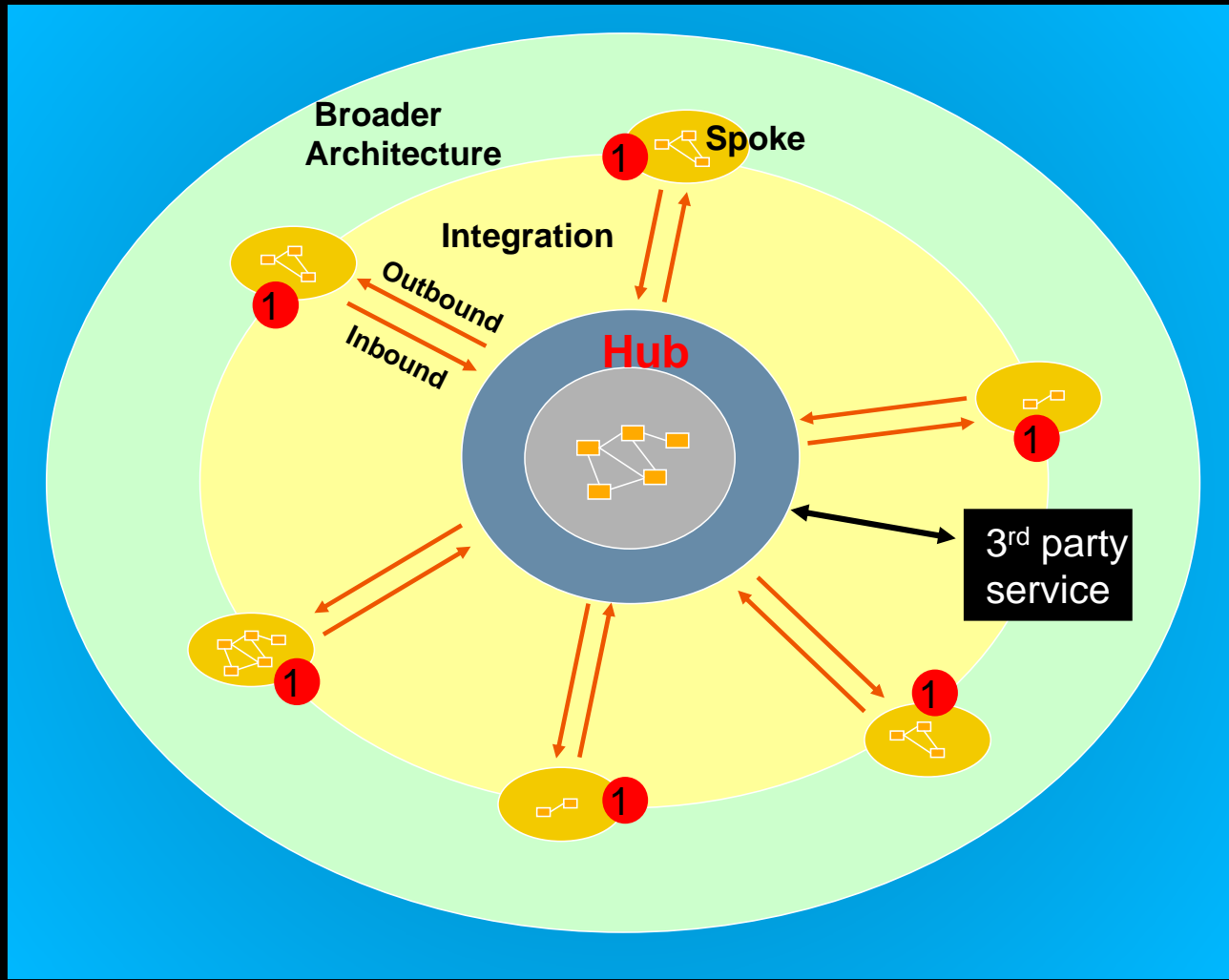


- 1 Data Analysis / Data Assessment (spokes)
- 2 Data Analysis / Master Data Model (Hub)
- 3 Define Business Logic / Process Flow
- 4 Identify / Define Participation Model
- 5 Overall architecture participation
- 6 Define Governance and Stewardship
- 7 Build / Deploy

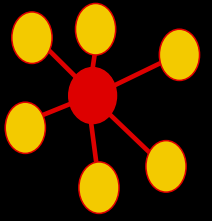


Customer Hub Methodology

1 Data Analysis / Data Assessment (spokes)

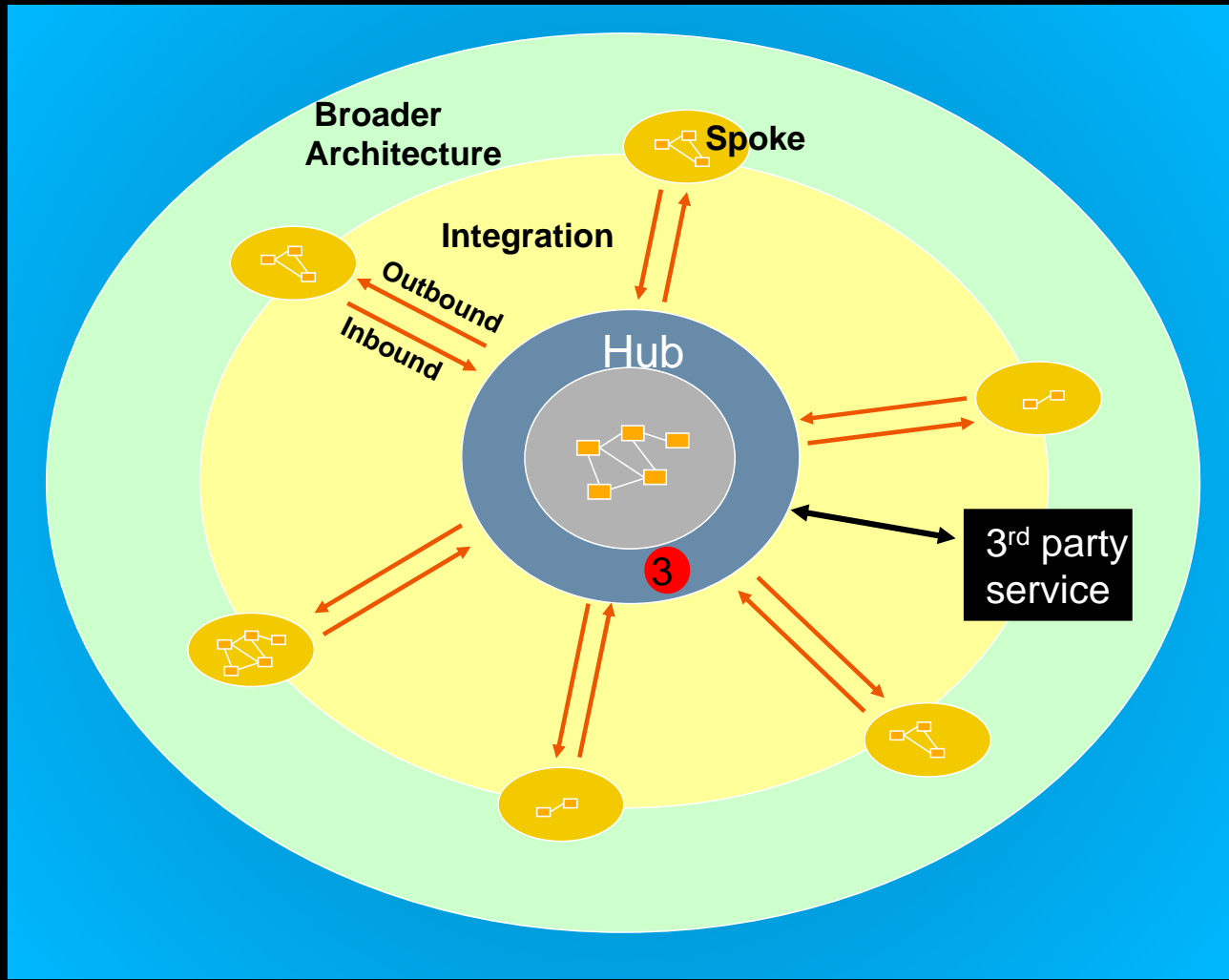


- Definitions, Attributes & Models
- Use cases / data accesses
- Volatility / Frequency / Velocity
- *Data Quality assessment*
- Dependencies
 - *Upstream/Downstream*
- Rules being applied
- Standards being applied
- Logic being applied
- What we have and what we need

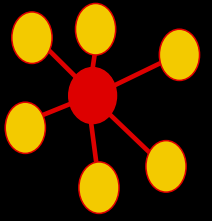


Customer Hub Methodology

3 Define Business Logic / Process Flow

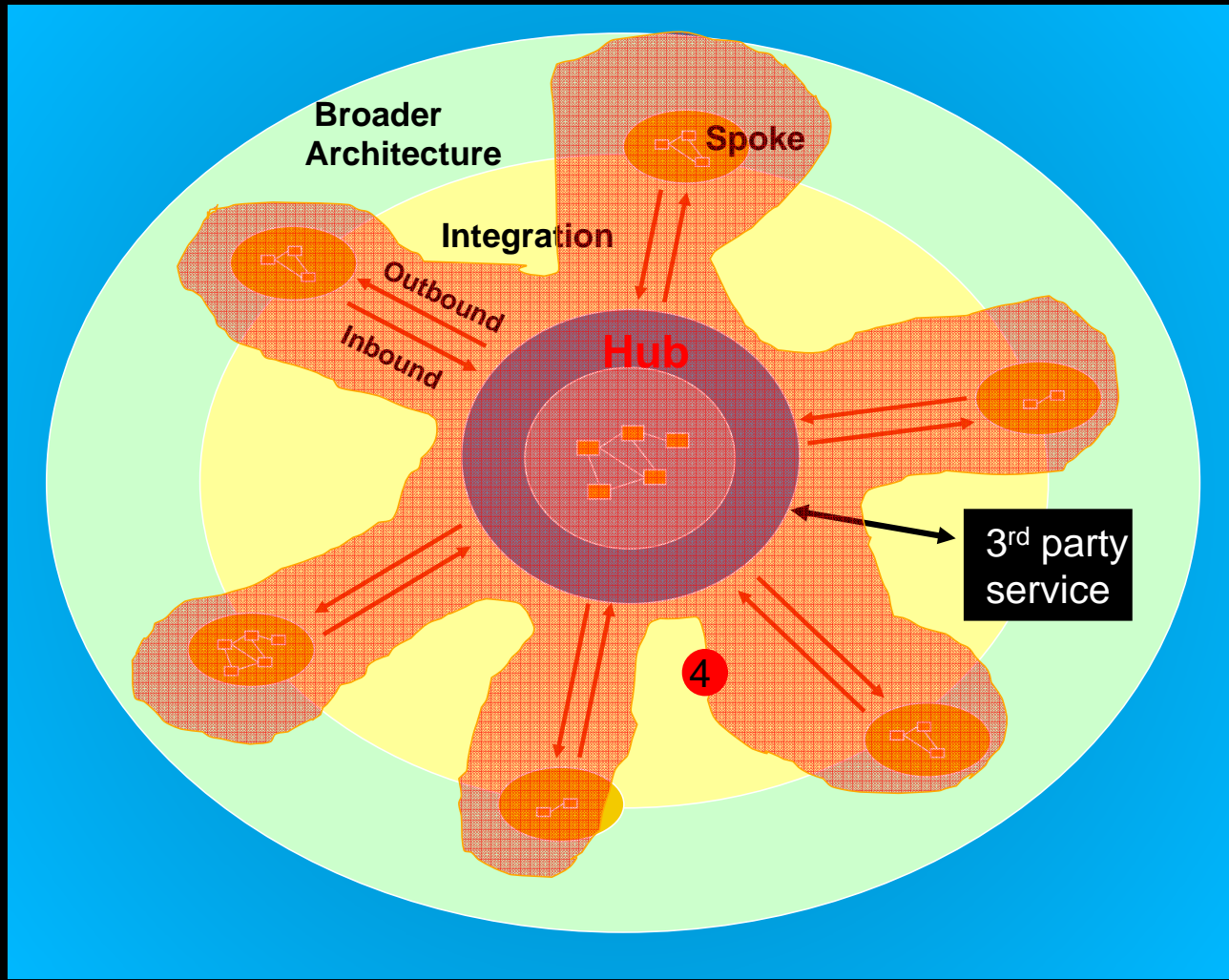


- Identify and map out the hub based business logic needed
- Validate that all Use cases and Data accesses are addressed
- Factor in Volatility, Frequency, Velocity
- Clearly identify all major Workflows (automated or one's with human interface)
- Dependencies identified
- Identify rules logic to be applied at the hub (cleansing rules, so on)
- Identify standards to be applied at the hub

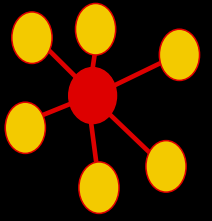


Customer Hub Methodology

4 Identify / Define Participation Model

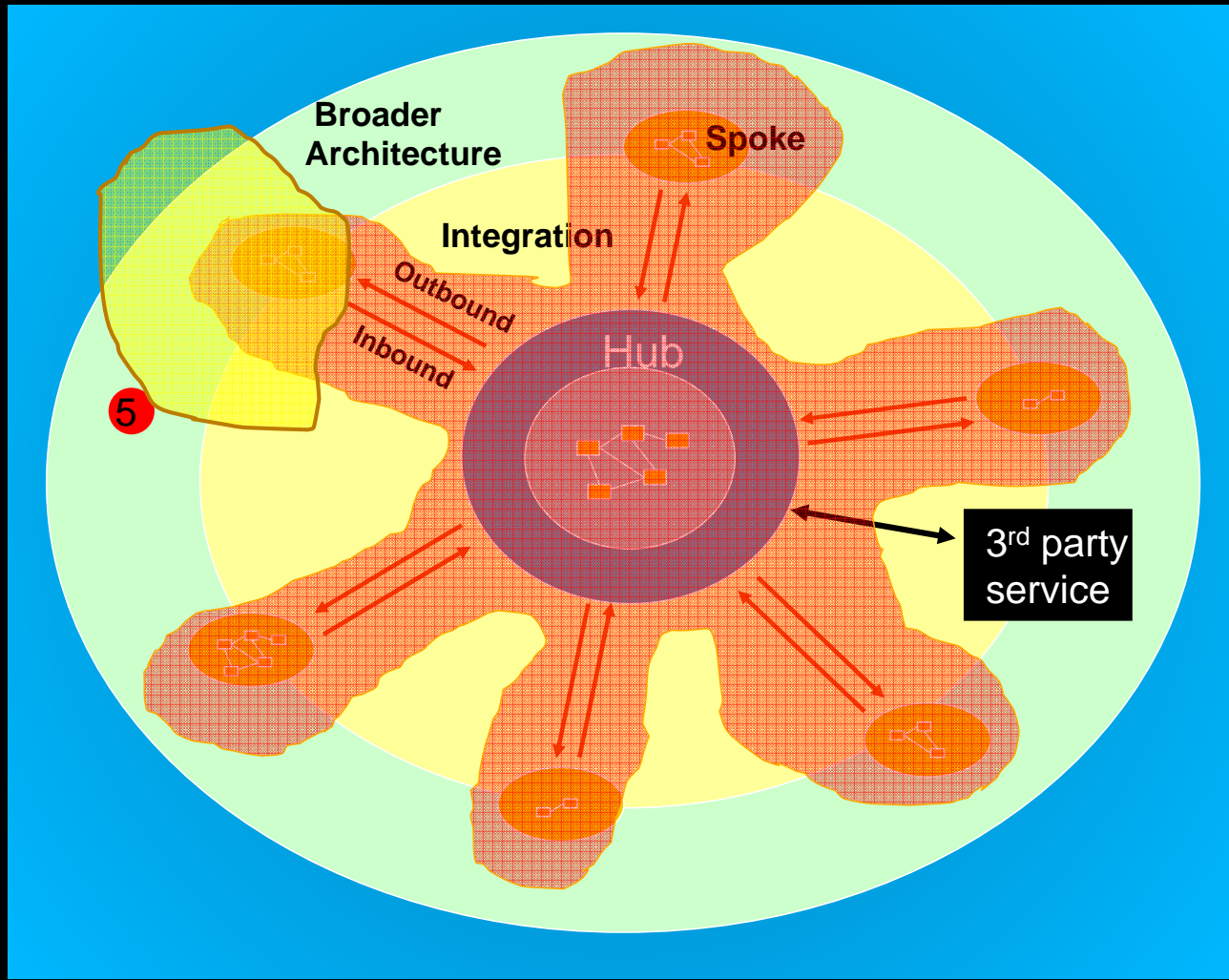


- Identify and define how each spoke interacts with the hub AND with each other (*termed participation model*)
- Clearly identify and define each inbound and outbound behavior in terms of publish, subscribe (*provider/consumer*)
- Remember, we are defining a microcosm of organisms that must now live together (*not a silo*)

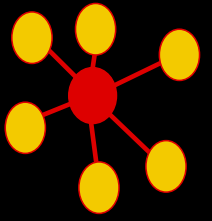


Customer Hub Methodology

5 Overall architecture participation

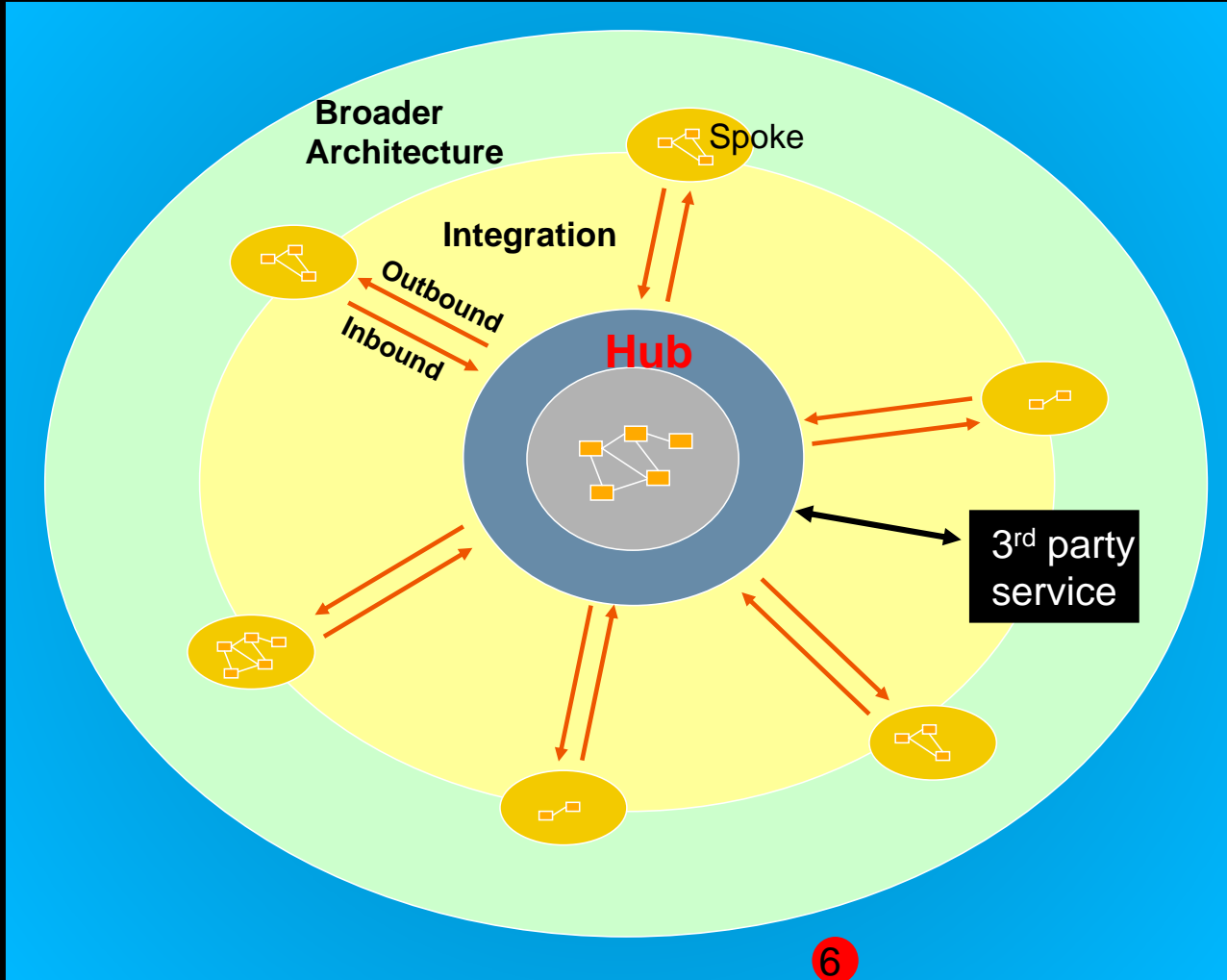


- Clearly identify how the MDM customer data is to be utilized in the broader company architecture.
- Examples are with ODS, Sales, Marketing, Finance, EDW, WS's, SOA, so on.
- This new microcosm must now fit into the broader universe of your other systems



Customer Hub Methodology

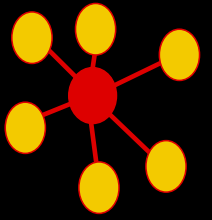
6 Define Governance and Stewardship



- Clearly identify how the MDM of Customer data is managed from the business side (process, workflow, ownership, coordination, and with a liaison into IT – the custodians)
- Create a stewardship model and organization. This may include a steering committee that acts as a policy maker and compliance arm of this key data

Customer Hub Methodology

Deliverables & Artifacts

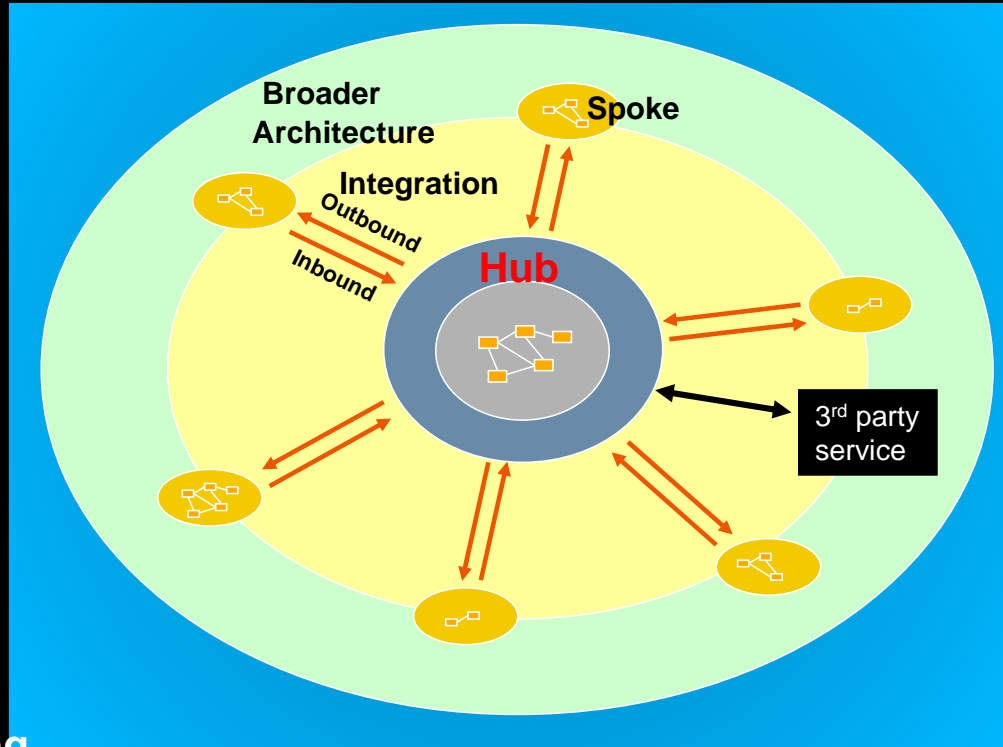


Metadata/Model

- Core attributes to be managed
- Party-based mappings (hub/spoke)
- Cross Reference Identities/Registry
- Ownership model
- Data Models (hub/spokes)
- life cycle (archive, purge, availability)

Business Logic

- Workflow
- Merge, match logic
- Standardization, cleansing
- Data sync needs
- Mappings/context
- Transformations needed
- Logical/physical merge approach
- Frequency/Velocity requirements



Participation Model

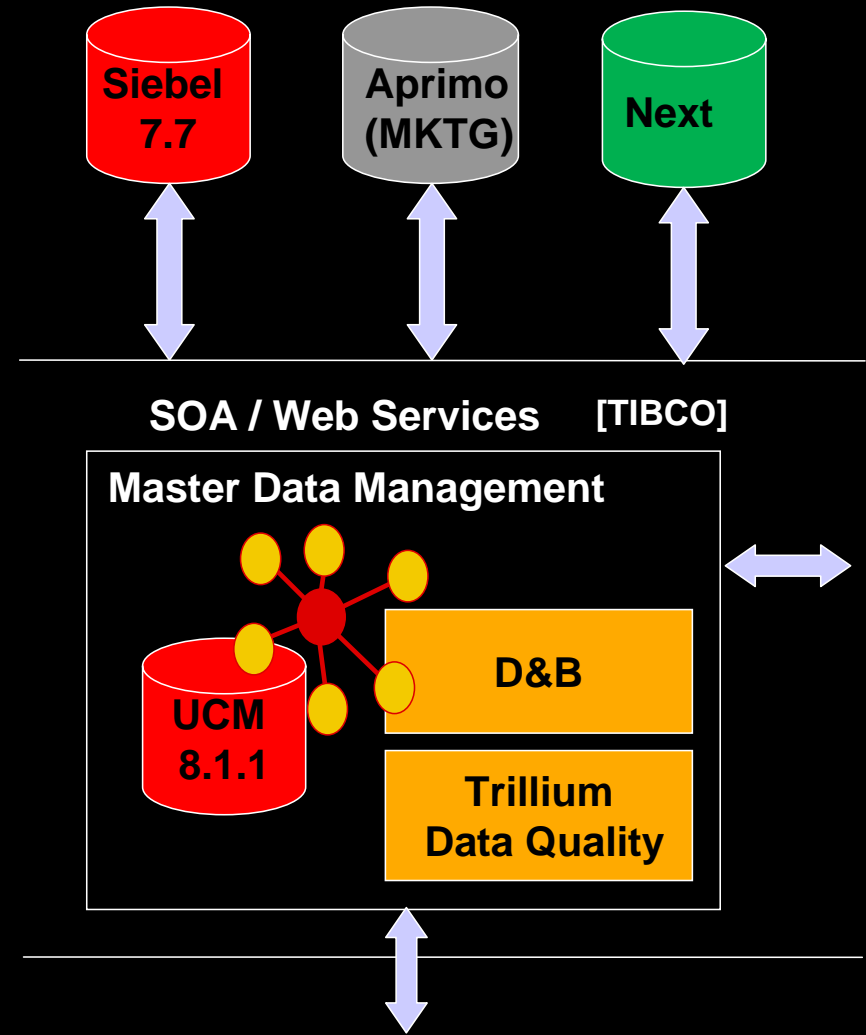
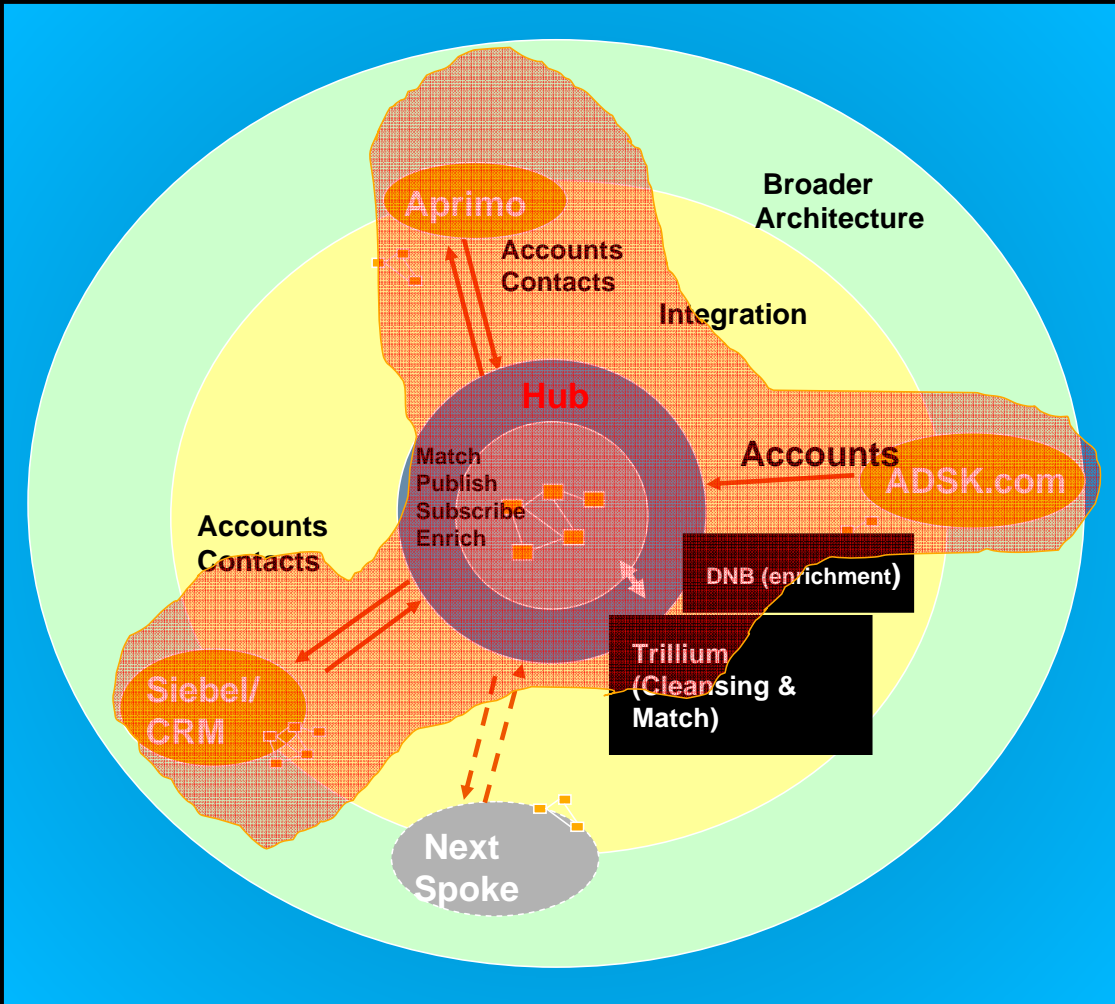
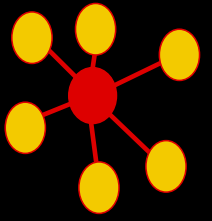
- Inbound/Outbound definitions
- Contributing Attributes from each spoke to the hub
- Overall publishing/subscribing needs (frequency/volatility)

Broader Architecture

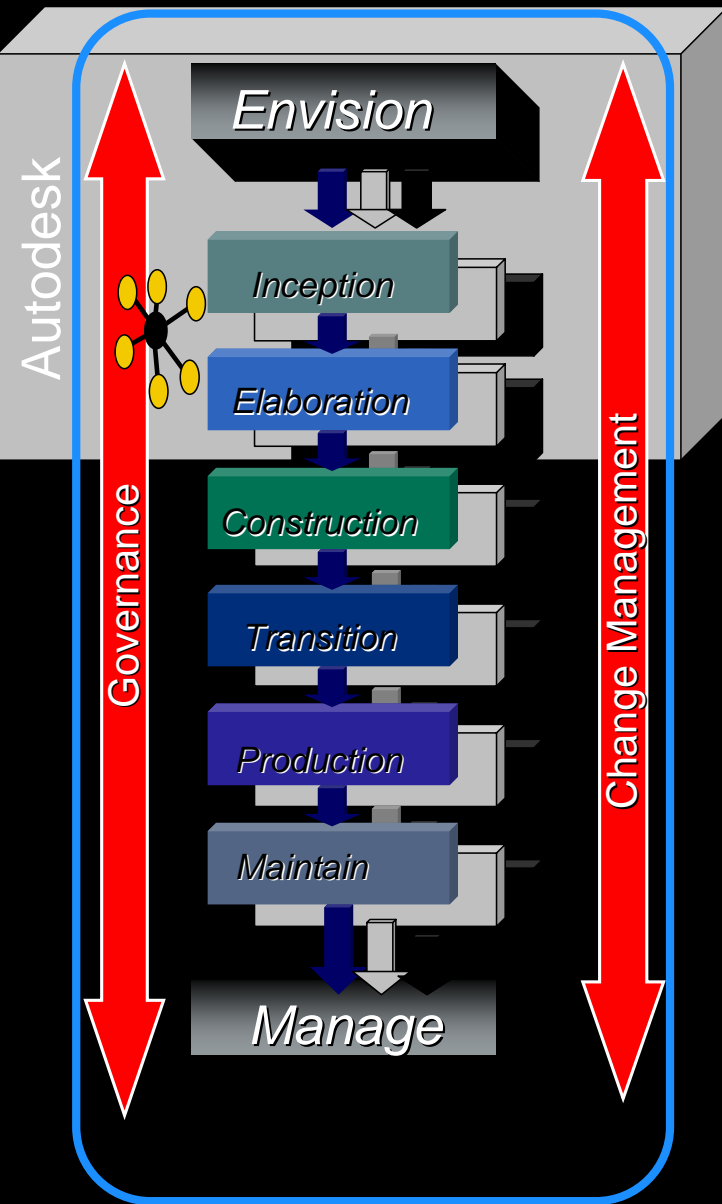
- Other system interfaces (Upstream/downstream)
- General exposure methods (WS, API, Services)

Customer Hub Methodology

Phase-1: Architecture



Overall Methodology



- ✓ MDM implementation involves both art (experience) and science (technology).
- ✓ Establish MDM vision, goals and phased solution roadmap
- ✓ Phased deployment – Faster, Easier, Better
- ✓ Define your customer data for enterprise use.
- ✓ Profile your data to understand and derive data quality rules
- ✓ Leverage profiling results for defining cleansing, matching, data enrichment and master data survivorship rules
- ✓ Design and develop reusable master data migration process for initial data load, ongoing batch, and M&A activities
- ✓ Validate your data migration with validation scripts and processes
- ✓ Establish data stewardship and governance policies and procedures
- ✓ Develop through use case based validation process for data stewardship and integrations.
- ✓ Enable your business and data intelligence methods and processes with master data.
- ✓ Assemble the right team – skilled resources with experience and plan knowledge transfer
- ✓ Methodology – Oracle Unified Method enhanced with MDM implementation content rich templates

Our success factors

- Agreement to start small and get it right!
- Get a customer identity strategy defined FIRST
- Put into place data governance (DGCT at ADSK).
- Get legacy data as clean as you can beforehand.
- Get MDM specialists to help you (Oracle MDM team) – it is too important for our existence to screw up
- Often requires top-down mandate to participate in the Hub – a “must participate” approach
- Don’t master something that doesn’t belong in the Hub.

Q&A



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