



MDM: Selecting a Vendor

by Andy Hayler



Module 0. About the Course (7 min)

Module 1. MDM Key Elements (26 min)

- *What Is Master Data ?*
- *PIM & CDI & MDM: Alphabet Soup*
- *MDM Styles*
- *Operational v Analytic MDM*
- *MDM Vendor Landscape*
- *Data Quality Vendor Landscape*

Module 2. Vendor Evaluation Model - Part 1 (81 min)

- *Functionality Model Overview*
- *Data Governance Functionality*
 - *Workflow Support*
 - *Triggers for Events*
 - *Role Segregation*
 - *Auditability*
 - *Managing Data Lineage*
 - *Data Stewardship Console*
 - *Multi-Stream Management*
- *Business Rules Functionality*
 - *Business Rules Stored as Data*
 - *Business Modeling Capability*
 - *Scripting Language*
 - *Manual Master Data Creation*
 - *Management of Multiple Business Entity Types*
 - *Hierarchy Management*
 - *Hierarchy Types*
 - *Provision of External (Standard) Data Models*
 - *Provision of External Industry Exchange Models*
- *Data Quality Functionality*
 - *Data Profiling*
 - *Data Type and Format Validation*
 - *Data Dependency Validation*
 - *Matching Algorithm Ability*
 - *Fuzzy Matching*
 - *Matching Accuracy*
 - *Match Rule Configuration*
 - *Parsing*
 - *Context-Sensitive Data Cleansing*
 - *Data Cleansing Rule Configuration*
 - *Merging & Survivorship*
 - *Data Enrichment e.g. Geocoding*
 - *Data Quality Monitoring*
 - *Language Identification and Standardizing*
 - *External Data Source Integration*
 - *Industry Specific Data Support*
 - *Industry Specific Templates*
 - *Links to Alternative Products*
- *Data Provision Functionality*



MDM-03: MDM: Selecting a Vendor

- Browsing
- Searching
- Portal Support
- Reporting
- Third Party Reporting Integration
- Selective Publishing
- Rule Based Data Provision
- Producing Alternate Schema/View Styles
- Publishing for Open Access
- *Master Data Storage Functionality*
 - Persistency
 - Time Variance
 - Bulk/Batch Data Loading
 - Object Identity Management
 - CRUD Functions
 - Archiving and Backup
 - Single or Multiple Schema?
 - Data Security, Privacy Capabilities
 - Application Security
 - Unstructured Data
 - Task Management
 - Meta Data Management
- *Data Movement Functionality*
 - Passive (Pull) Capabilities
 - Active
 - Subscription (Push) Capabilities
 - Data Retrieval through API
 - Support for Federated Deployments
 - Synchronization Management

Module 3. Vendor Evaluation Model - Part 2 (69 min)

- *Commercial Model*
 - Customer Base
 - Revenues
 - Growth
 - Geographic Spread
 - Partner Network Quality
 - Financial Viability
 - Marketing Effectiveness
 - Track Record in Data Domain
 - Track Record in Your Industry
 - Management Quality
- *Technical Model*
 - Ease of Use
 - Systems Management
 - Support for Appropriate Standards
 - Completeness of APIs
 - Completeness of Web Services Support
 - Platform Support (Operating Systems)
 - DBMS Support



MDM-03: MDM: Selecting a Vendor

- Hardware Support
- Multi-Language Support
- Double-Byte Character Support
- Performance
- Scalability
- Load Balancing & Failover
- Technical Support
- Training
- Documentation
- Reliability
- Technology Roadmap
- Error Handling
- Conformance to Accessibility Standards
- System Audit
- Ease of Implementation
- Innovation
- *Vendor Evaluation Spreadsheet*
 - Vendor Evaluation Model
 - Vendor Evaluation Spreadsheet
 - Tips on Using the Spreadsheet
 - Test Script
 - End Result

Module 4. Vendor Landscape (50 min)

Module 5. Vendor Landscape (47 min)

- *25 detailed MDM vendor reviews*
 - For each vendor strengths and weaknesses are discussed
 - For each vendor evaluation chart is built and analyzed

Module 6. Software Procurement (42 min)

- *Procurement Approach*
- *Business Case*
- *Short-listing*
 - Short-listing Tips
 - Short-listing Process
 - Short-listing Criteria
- *Request for Proposal (RFP)*
- *Evaluation*
- *Procurement*
 - Getting the Best Price
 - Maintenance Costs
 - Negotiation Timing
 - Value of References
 - Long-Term Relationship

Module 7. Conclusions (14 min)