9 Steps to

Getting started with MDM

Educate Yourself

Begin by educating yourself on the fundamentals of Master Data Management (MDM).

We recommend you review the following key concepts: MDM implementation styles, common MDM platform functions, domain categories and typical master data needs in your industry.

Understand Where You Are

It is likely that your organisation is already managing master data in some way.

Some common scenarios we often encounter with new clients include CRM and ERP systems being the system of record, master data being managed in Excel, or that MDM was too expensive so they built something in-house.

Understand Your Scope

By department? By application? By region? By domain?

We work with clients along a spectrum, from those who have made executive level MDM decisions to individuals with specific use cases to solve.

Understanding your organisational support for MDM is key to outlining MDM's scope. The starting point is critical in building your MDM solution.

Build A Business Case

MDM is not a project. It is a major business initiative and cornerstone of any enterprise information strategy (Gartner).

MDM requires ongoing funding in future budget cycles to succeed.

Building a business case tied to business objectives that impact the bottom line is key.

Identify Stakeholders

Operational MDM done well requires people to change how they work.

Identify the stakeholders who will manage your eventual data stewardship community and involve them from early stages.

Seek out operational departments that will be affected by MDM and educate them on the concept of MDM.

Don't Ignore Governance

Consider governance versus stewardship and understand the differences.

Basically, governance defines what needs to be done; stewardship does it.

Items to address at a first governance meeting should include source system analysis, data model definitions and process design.

The MDM Program Charter

Where do I start?

Participants of the first governance meeting are often a bit unsure about where exactly to start. Therefore, set clear expectations about the goals.

Similar to governance itself, the charter should be scaled to the scope of your MDM program.

Select Your MDM Platform

You may be surprised that we defer this step to now.

Master Data Management is a multifaceted problem, and technology is one part of the solution.

Premature platform purchase and implementation encourages you to shortcut planning and simply start "doing".

Measure Your Success

KPIs are critical. At this point you've built a business case, received funding, gotten the right people involved, delivered the first phase of your project to production, and have an active and growing data stewardship community.

Measure the business value it is actually delivering relative to your business case.