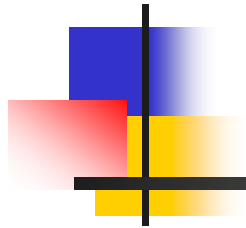


Technical Evaluation Criteria & Field Reports on Major MDM Solutions



4th Annual MDM Asia-Pacific Summit
April 29, 2009

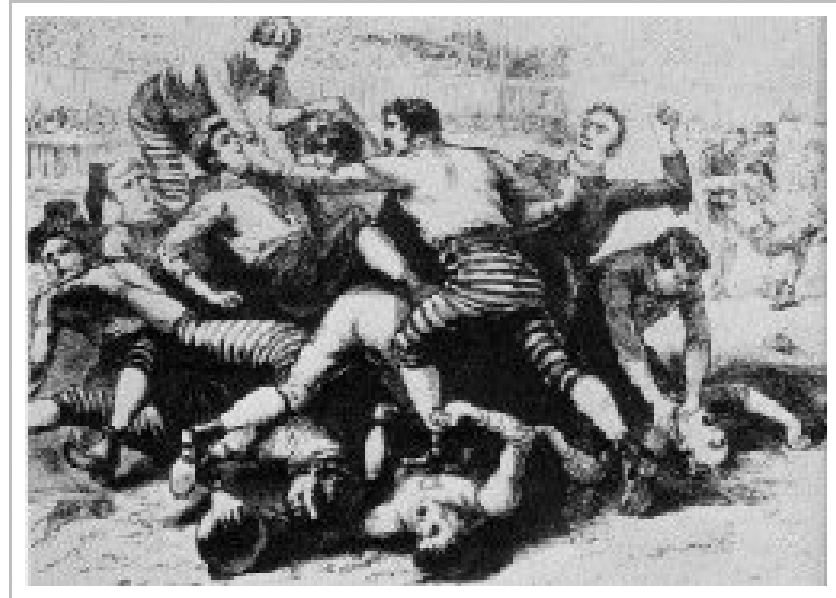
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“Top 10” MDM Evaluation Criteria

1. Data model
2. Business services
3. Identity resolution
4. Data governance
5. Architecture
6. Data management
7. Infrastructure
8. Analytics
9. Developer productivity
10. Vendor integrity



Infrastructure fracas will escalate as mega app vendors rush to dominate business services/processes & data models as high ground



Ancillary MDM Solutions

- Actuate/Nimble Technology (Data Lens, Nimble Integration Suite)
- Acxiom
- Adastra
- Amalto
- Austin-Tetra (Equifax)
- Chordiant (Chordiant 5Enterprise Platform)
- Composite Software
- Cross Z
- Denodo
- Endeca
- Exeros
- Experian
- Gaine Solutions
- Globals IDs
- GoldenGate Software (Global Data Synchronization)
- Golden Source
- Group 1 (CDI Suite)
- Harte-Hanks (AllLink, Trillium)
- Heiler Software
- Human Inference
- Informatica
- InfoGlide
- InfoUSA/Donnelley Marketing (InfoConnect)
- I-way
- Liaison Technologies
- MetaTomix (Real-Time Novell (Customer OneView))
- Netrics
- Nimaya
- Omikron
- Orchestra Networks
- Pervasive
- Platon (AddressDoctor)
- Polk
- QAD Fulltilt
- Riversand Technologies
- Secerno
- Sedona (Intarsia)
- Silver Creek Systems
- Software AG
- Sybase
- Talend
- Trillium Software
- Varonis



Competitive Field Reports**

- D&B/Purisma Data Hub
- DataFlux MDM
- Data Foundations OneData
- i2 MDM
- IBM InfoSphere MDM Server
- Initiate Systems Master Data Services
- Kalido MDM
- Microsoft MDM
- Oracle CDH/DRM/UCM
- SAP NetWeaver MDM
- Siperian MDM Hub
- Sun MDM Suite
- Teradata MDM
- TIBCO CIM
- VisionWare MultiVue

** Persisted customer data hubs with minimum 5 installs



Field Report: D&B Purisma Data Hub 4.0

■ Strengths

- Momentum¹ in existing D&B customer base – 300% YTY
- Rapidly deployable, high performance matching engine
- B2B & B2C hierarchy mgmt – including franchise & alternative corporate relationships
- Global/Master reference data as a service – 3rd party data, D&B, data integration
- Deep experience in marketing & sales related MDM projects
- Strong data governance applications – research shortcuts, “Decorators”, “Data Inspector”
- Strong financial strength with considerable investments in CDI

■ Weaknesses

- Lacking integration with other PIM or product master hubs
- Lack of strong SI channel – mostly Attevo, eTouch
- Lack of industry data models
- Only granular web services
- Very limited marketing
- Few B2C references
- References¹ ramping up

¹ – ADP Dealer Services, Aramark, AT&T, Bain & Co, Ceridian, Clear Channel, DSB (Danish National Railroad), Endeca, Fidelity, First Tennessee, IHS, Johnson Controls, Kimberley Clark, McAfee, Nortel, Norwegian Cruise Lines, R R Donnelley, RSC Equipment Rental, Verizon, Williams Scotsman, W W Grainger, ...



Field Report: DataFlux qMDM v2

■ Strengths

- Graduated approach to MDM
- Integrated data quality
- Multi-entity data model
- Commitment to active data governance & related work flow
- SAS “deep pockets”, channel & stability
- Rapid plans for integration of SAS data integration technologies
- Midmarket CDI references – American Heart Association, Intrawest, StorageTek/Sun

■ Weaknesses

- Modest # of MDM references – DSM, NMBS, WaMu
- Nascent support & references for product master data
- Relatively small # of customers adding product master to customer master
- No references for registry or high-volume transactional MDM implementations
- Lack of SI channels
- Lack of BPM/workflow for “policy hubs”



Field Report: Data Foundations OneData 4.4

■ Strengths

- Data model flexibility
- Focus on MDM & reference data
- Integrated customer, product & vendor master data
- Fast time to value with pre-packaged templates
- Full lifecycle with data governance framework
- Full SOA
- References¹
- Sophisticated hierarchy mgmt – e.g., relationship charts, rules management
- Process hub capabilities evolving – via new rules engine & OneData Anywhere
- Price

■ Weaknesses

- Lack of data cleansing integration
- Lack of strong SI channel
- Under invested in marketing
- Lack of CDI references

1 - Avon, Eurotax, Novartis, Pepsico, Wellpoint



Field Report: i2 Master Data Management

■ Strengths

- Full lifecycle
- Integrated enterprise MDM – customer, product & vendor
- Full SOA including reference workflows
- Retail, manufacturing, PIM & vendor management expertise
- Data model flexibility
- Focus on MDM – 10+ years & over 1K implementations experience in data models, data semantics & data mgmt

■ Weaknesses

- Lack of strong SI channel
- Under investment in marketing = name recognition & market awareness issues
- Lack of CDI references
- Long term vendor viability issue



Field Report:

IBM InfoSphere MDM Server ¹

■ Strengths

- Analytical, operational & collaborative MDM with advanced “Party” data model
- Multi-domain/form/entity support for dynamic product mastering
- SOA architecture & cross-domain services
- Industry model expertise & focus on business-level services
- Integration with Information Server proactive DQ processing & data integration
- Integration with Enterprise Analytics, Content Management & FileNET
- Market momentum²
- High-end production sites – BCE, Citi, MetLife, ...
- Channel leverage via IBM GBS channel + *major* SI partners ³

■ Weaknesses

- Active DG governance strategy maturing
- BPM strategy is maturing for process hubs
- Registry strategy still maturing

1 - Formerly IBM WebSphere Customer Center (WCC) & DWL Customer

2 - Momentum – new customers include: AEGON, AXA, Bank of Montreal, Dubai World, Erie Indemnity, Physicians Mutual, Safeway, Volkswagen, Walmart, WellPoint, Woolworths, ...

3 - Major SI Partners – Accenture; Capgemini; Cognizant; CSC; Deloitte; Infosys; Satyam; Sogeti; TCS; Wipro



Field Report: Initiate Master Data Service – v8.7

■ Strengths

- Fast time-to-value
- Real-time probabilistic match scalability & accuracy
- Scalable references – CVS, Dell, FedEx, Humana, Int'l Hotel Group, Walgreens, ...
- Healthcare/Health Insurance¹, Hospitality, Retail Pharmacy, Government² expertise
- Rapid growth in customer base – 180+ customers³
- Data stewardship capabilities

■ Weaknesses

- Product entity type references limited
- Active data governance strategy still emerging
- Transactional hub references limited
- Industry-specific business services capabilities just emerging
- SI channel ramping up⁴ outside of healthcare

1 - Healthcare, Health Insurance expertise - BCBS of MN, BCBS of CA, BCBS of KS, Humana

2 - Government expertise - HMRC, State of ND, Leeds City Council, Borough of Brent

3 - New in 2008/09 – Dell, FedEx, Grange Mutual, SunCorp, Sun Int'l Ltd, Tower Insurance, Vancity, Walgreens, Zurich

4 - SIs = Accenture, BearingPoint, Capgemini, IBM GBS, Raytheon, ... mostly healthcare still or government



Field Report: Kalido MDM 8.4

■ Strengths

- Time-to-value/ROI
- Analytical MDM focus w/ modest # operational MDM users
- Visual business modeler
- OOTB multi-entity¹
- Process flows & workflow engine for data governance/stewardship
- Focus on MDM for analytics & corporate performance mgmt
- MDM methodology
- Model flexibility for customization
- Time variance support for change mgmt
- Momentum² & references³

■ Weaknesses

- Lacks native identity resolution
- Lack of portal/UI for business user
- Lack of strong SI channel
- Performance/scaling limit = common analytical MDM use case

1 - Customer, product, financial, supplier, employee, location, KPI, etc.

2 - The Hartford, P&G, Great American Financial Resource Inc., Bank Atlantic, ...

3 - BAT, BP, Imperial Tobacco Group, Labatt, Nationwide, Owens-Corning, Shell, ...



Field Report: Microsoft MDM (Stratature + EDM)

■ Strengths

- Hierarchy management
- Customer, product, financial, supplier, employee, KPI, etc.
- Microsoft software stack
- Integration with SharePoint & MS Office
- Support for dynamic ERP & CRM
- Support for PSFT, SAP BW, R/3 hierarchy import
- Low cost of ownership / CAL licensing

■ Weaknesses

- No data governance roadmap
- Lacks identity resolution
- Not enterprise scalable
- Lack of strong SI channel
- Under invested in marketing

** Enterprise Dimension Management



Field Report: Oracle Customer Data Hub v12.1.1

■ Strengths

- Strong enterprise MDM vision & roadmap
- Multi-entity platform¹
- Trading Community Architecture
- Mid-market references²
- High-tech manufacturing expertise
- Global ID generation, mgmt & x-ref
- Integrated DQ & Analytics
- Global reach³
- Upgrade path to Fusion MDM via automation – not migration

■ Weaknesses

- High-end references
- Fair-to-meeek customer recognition capability
- Best fit is B2B & mid-market
- Lack of industry-specific data models

1 - Parties, Products (PIM Hub), Locations (Site Hub)

2 - BBC-TV, CIT Group, Co-Op, Etat de Geneve, GGB, Hanjin Shipping, Network Appliance , ...

3 - Security blanket for government, high tech, & manufacturing industries



Field Report: Oracle Hyperion DRM ^{1,2} 9.3

■ Strengths

- Analytical MDM for sharing dimensions, hierarchies, & reporting
- Operational MDM (Ledger Hub) for cost centers, legal entities, etc.
- Mature product (due to Razza acquisition)
- Hierarchy mgmt
- Robust business rules engine
- Intuitive change mgmt suitable for business users
- Strength in both financials & Financial Services industry
- Integration with Hyperion corporate performance mgmt apps & others
- Potential registry-style offering in MDM family
- Potential strategic technology³

■ Weaknesses

- Minimal marketing of the solution
- Potential future MDM restrictions of core MDM functionality solely to financial master data & analytical
- Passive data governance

1 - Formerly Hyperion MDM

2 - DRM = data relationship management

3 - Potential to provide hierarchical unification across CDH & UCM (as well as IBM, SAP, & others)



Field Report:

Oracle Universal Customer Master ¹ v8.1

■ Strengths

- Strong enterprise MDM & DG vision & roadmap
- First to market with process hub
 - Privacy Management Policy Hub
- Momentum & expertise in Telco & Retail Banking
- High-end production sites²
- Proven performance
- Integrated DQ & analytics
- Integration architecture³
- Strong SI channel
- Future Oracle DB integration
- Upgrade path to Fusion MDM via automation – not migration

■ Weaknesses

- Active data governance strategy emerging
- Delay of Fusion MDM
- Registry strategy still evolving

1 - Formerly Siebel Universal Customer Master (UCM)

2 - Home Depot, KPN, Royal Caribbean Cruise Lines, Toyota Financial Services, ...

3 – Fusion Middleware, Web Services & Application Integration Architecture (AIA)



Field Report: SAP NetWeaver MDM v7.1

■ Strengths

- Analytical MDM reporting for customer/party
- Operational MDM for supplier & product
- Quantity of MDM references¹
- Supply chain expertise
- Multi-entity MDM focus² & consistent product strategy
- Integration with BOBJ data quality & integration (ETL)
- SAP underpinnings for systems/change mgmt

■ Weaknesses

- Operational MDM for 'customer/party' not field proven
 - Did not support "full data" model until 7.1³
 - Previously lacking due to party model limitations
- Active data governance capabilities just emerging
- Registry strategy still maturing

1 – CDI-related = Adidas, Intel, Nortel, Whirlpool, ...

2 - Including full product information management (PIM) capability & support for material, vendor, etc.

3 –Very conservative ramp up 1Q CY2009

5 – Prior version (MDM 5.5) data model did not fully support party concept; "business partner" = customer & is the model used in SAP CRM



Field Report: Siperian MDM Hub

■ Strengths

- Field-tested multi-entity support¹
- Entity lifecycle mgmt – esp. data governance
- Multiple implementation architectures/use cases – e.g., registry/transactional/coexistence
- Federated architecture
- Pharma² expertise/momentum
- Strong partnership with Informatica for entity resolution
- Strong partnerships with EMC BusinessEdge & Cognizant
- Multiple projects within same enterprise – i.e. phase 2 deployments

■ Weaknesses

- Financial stability
- “Pharma-centric”
- “PIM-lite”
- Under invested in marketing
- Lack of focus on industry markets
- Lack of global presence
- Lack of other SI support

1 - Products/Customers; B2B/B2C/B2B2C;
Employee/Contractor/Clinical Protocol/Product

2 - Allergan, Astra Zeneca, Forest Labs, Johnson & Johnson, Pfizer, Shire



Field Report: Sun Microsystems MDM Suite R6

■ Strengths

- Open source (Mural, JCAPS)¹
- SeeBeyond heritage
- Primarily supporting registry-style approach
- High scalability – albeit via toolkit approach
- Party data – customer, supplier, & citizen
- 100+ installations of SeeBeyond¹
- 10+ of MDM Suite

■ Weaknesses

- Open source
- Under invested in marketing
- Perceived as “healthcare- & government-centric”
- Unknown future due to pending Oracle acquisition (ditto for MySQL)

¹ – Geisinger Health Systems, Harrods, Harrow Council, Infonet, Los Angeles Department of Water & Power, Providence Health System, National Health Svc (UK)



Field Report: Teradata MDM 2.1

■ Strengths

- Analytical & operational MDM + party & product & financial
- Full lifecycle & process flows for multi-entity support
- Consolidated EDW & MDM platform
- Integration with Teradata DB, Miner, et al = parallelism at DB level
- Workflow + data models + GUIs = more than headless app, more than data steward console
- CDI accelerator with strong leverage of relationships
- DQ integration with Trillium, SAP DQM, INFA Name3

■ Weaknesses

- Modest references¹ given its newness
- Active data governance strategy evolving
- SI support ramping up

¹ – Anheuser-Busch; Electronic Arts; Hersheys; Intel; large UK bank; Wells Fargo/Wachovia



Field Report:

TIBCO Collaborative Information Mgr 7.x

■ Strengths

- Well suited for both operational & collaborative MDM
- Full lifecycle & process flows for multi-entity support
- Multi-hub, multi-application MDM deployment
- Newly added rules-based matching
- Architecture fits well with real-time & distributed services nature of SOA
- Import/export of hierarchical data from multiple sources simultaneously
- Intelligent MDM-integrated search

■ Weaknesses

- Missing formal CDI solution – i.e. packaged more as a “kit”
- Active data governance strategy evolving
- Under invested in marketing

1 – Alstom, Brinker, Merck, Merrill Lynch, Nielsen, Shell Oil, Swisscom Mobile, Vodaphone, Wachovia, Wind, ...



Field Report: VisionWare MultiVue Identification Server

■ Strengths

- Analytical-capable + operational-focused MDM
- Multi-entity – people, property & assets
- Public sector expertise
- Sophisticated, yet well-packaged core MDM functionality – e.g., DB partitioning, web services, BPM
- Mid-market pricing
- Microsoft as channel
- Microsoft software stack affinity
- Longevity – e.g., 100+ installations

■ Weaknesses

- Strategy beyond public sector just beginning
- UK-centric
- Currently mid-market scalability¹ – e.g., millions vs. 10s of millions of master records
- Matching algorithms for data custodianship evolving – not automated self-tuning level yet
- Data governance strategy evolving
- Registry-orientation more than persisted data hub

1 – Product tested up to 50 million records with no performance issues; additional future testing with Microsoft Scalability labs



Bottom Line

- Acknowledge no MDM single vendor “does it all well”
 - Analytical vs. Operational vs. Collaborative MDM
 - B2B vs. B2C vs. B2B2C
 - Batch vs. real-time
- Recognize that industry expertise matters
- Test drive identity resolution/matching & consulting expertise
- Invest in data governance for long-term sustainability & ROI



“Lessons Learned” 1Q CY2009

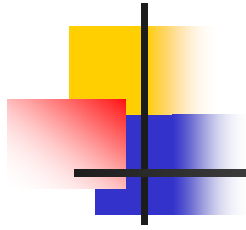
- Promote MDM as essential business strategy with IT deliverables to leverage high-value info used repeatedly across many business processes
- Position MDM as enabler of key business activities such as improving customer communication & reporting – rather than an important infrastructure upgrade
- Begin MDM projects focused on either customer-centricity or product/service optimization
- Plan for multi-entity MDM solutions evolving from “early adopter” status into “competitive business strategy” during 2009-10



How to Leverage the MDM Institute

- Kick start the “MDM evaluation process”
 - Attend public workshop
 - Bring workshop on-site
- Fine tune in-process MDM strategies
 - Due diligence on reference checking & contract details
- Stay ahead of curve via MDM Business Council
 - Re-qualify every 6 months via survey
 - Receive MDM Alerts & access to Web-hosted research
- Increase your knowledge & negotiating strengths via MDM Advisory Council Membership
 - Participate in monthly email surveys & receive updated industry scorecard
 - Receive monthly MDM consultation via telephone

“ Independent, Authoritative, & Relevant”



Aaron Zornes
Founder & Chief Research Officer
The MDM Institute

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About the MDM Institute

- Founded in 2004 to focus on MDM business drivers & technology challenges
- MDM Advisory Council™ of 100 Global 5000 IT organizations with unlimited advice to key individuals, e.g. CTOs, CIOs, data architects
- MDM Business Council™ website access & email support to 15,000+ members
- MDM Road Map & Milestones™ annual strategic planning assumptions
- MDM Alert™ bi-weekly newsletter
- MDM Market Pulse™ monthly surveys
- MDM Fast Track™ one-day public & onsite workshop rotating quarterly through major North American, European, & Asia-Pacific metro areas
- MDM SUMMIT™ annual conferences in Frankfurt, London, Madrid, NYC, San Francisco & Sydney

About Aaron Zornes

- Most quoted industry analyst authority on topics of MDM & CDI
 - Founder & Chief Research Officer of the MDM Institute
- Conference chairman for DM Review's MDM SUMMIT conference series
 - Founded & ran META Group's largest research practice for 14 years
 - M.S. in Management Information Systems from University of Arizona

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MDM Institute Advisory Council

- Advisor agrees to provide Institute's consultants with advice & insight regarding the use of MDM software & related business processes at Advisor's convenience
- Advisor agrees to participate in at least one fifteen (15) minute survey teleconference call every sixty (60) days
- Optionally, Advisor may respond to the bi-monthly survey request via email or Internet-based survey fulfillment
- Results of such MDM market research surveys shall be aggregated by the Institute & made available to all Advisory Council members
- In no case, shall any Advisor-specific survey information be made available to other parties unless Advisor has specifically agreed to the release of such information in writing

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100 organizations who receive unlimited MDM advice to key individuals, e.g. CTOs, CIOs, & MDM project leads