



IBM 2010 新锐洞察高峰论坛

心·睿 掌控制胜先机





Evolution of MDM to MIM

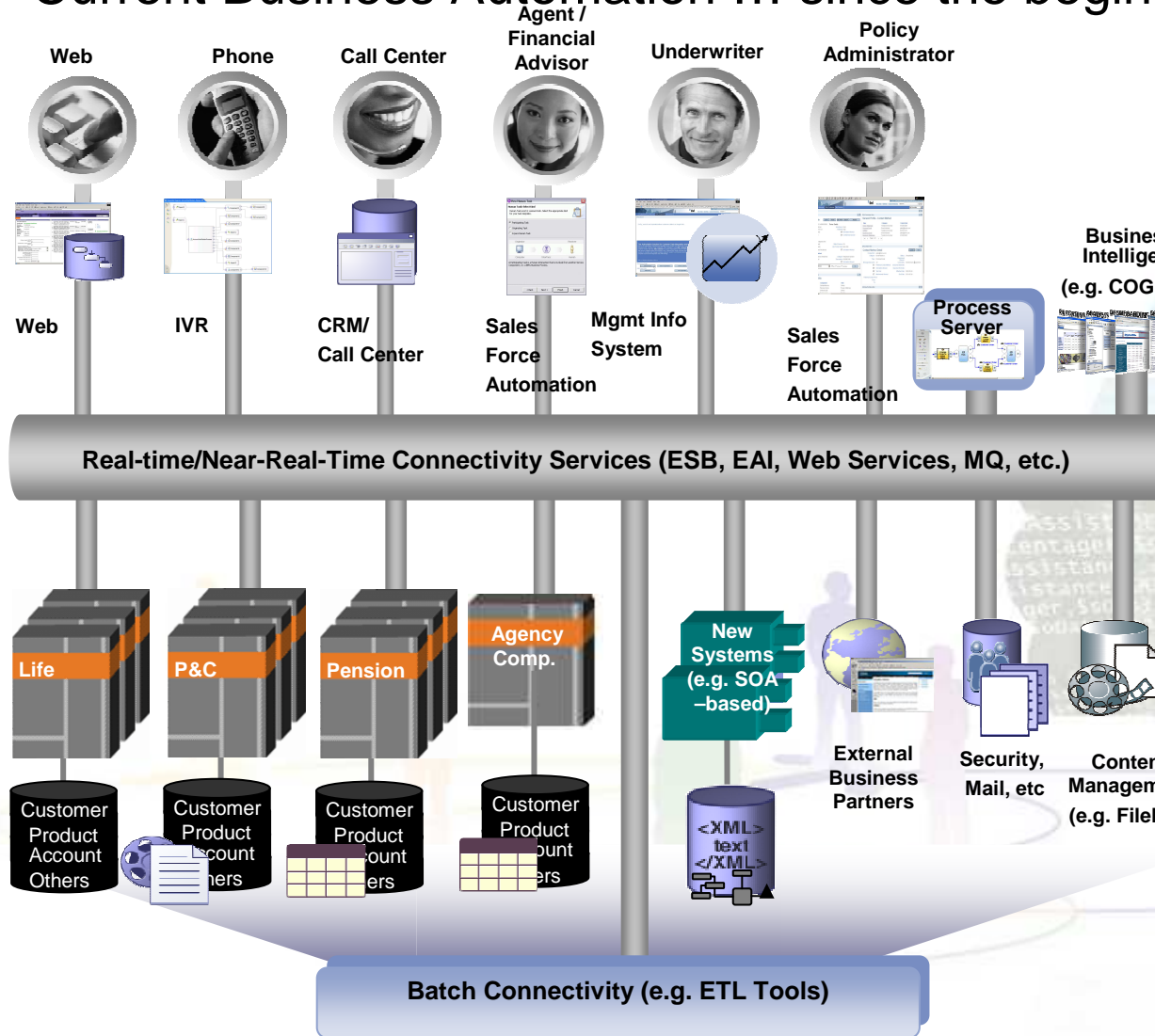
May Li

InfoSphere Master Information
Management, Software Group

Worldwide Technical Sales Leader



Current Business Automation ... since the beginning of Info Technology



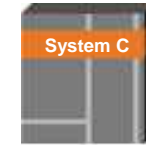
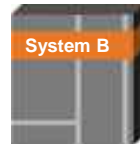
APPLICATION AGENDA ERA ...

- IT Applications built in silo to solve specific business problems (Policy Admin, Underwriting, Claims, Compensation, etc)
- Line-of-business focused (Home, Auto, Yacht, Life, Investment Funds, etc)
- Common data (e.g Customer) in disparate systems resulting in duplicates and non-trusted data



Non-Trusted Data

Common Data in Disparate Systems Cause Data Quality Problems...



Name:	Li May	Li Mei	Li Nan	Li Mei
Gender:	Female	F	Male	Female
Birth Date:	1 Aug 1980	1/8/1980	9/2/1963	8/1/80
Marital Status:	Single	Married	Married	M
ID:	Passport: BA26355	IC:8001012111111111	D/L:6309022222222222	IC:8001012111111111
Address:	1 Main St, ...	1 Main Street, ...	No 1 Main St, ...	2 Main Street, ...

- ARE THEY THE SAME PERSON?
- ARE THEY RELATED TO OTHER CUSTOMERS?
- IS THE CUSTOMER ALSO AN EMPLOYEE
- WHICH ADDRESS IS CORRECT



Leaders Investing to Optimize Information Assets

Clients Tell Us What They Are Looking For ... Trusted Data



Insightful

Derive meaning from information changes



In Context

Real-time delivery of relevant information when and where it's needed



Complete

Related information reconciled into a single and holistic view

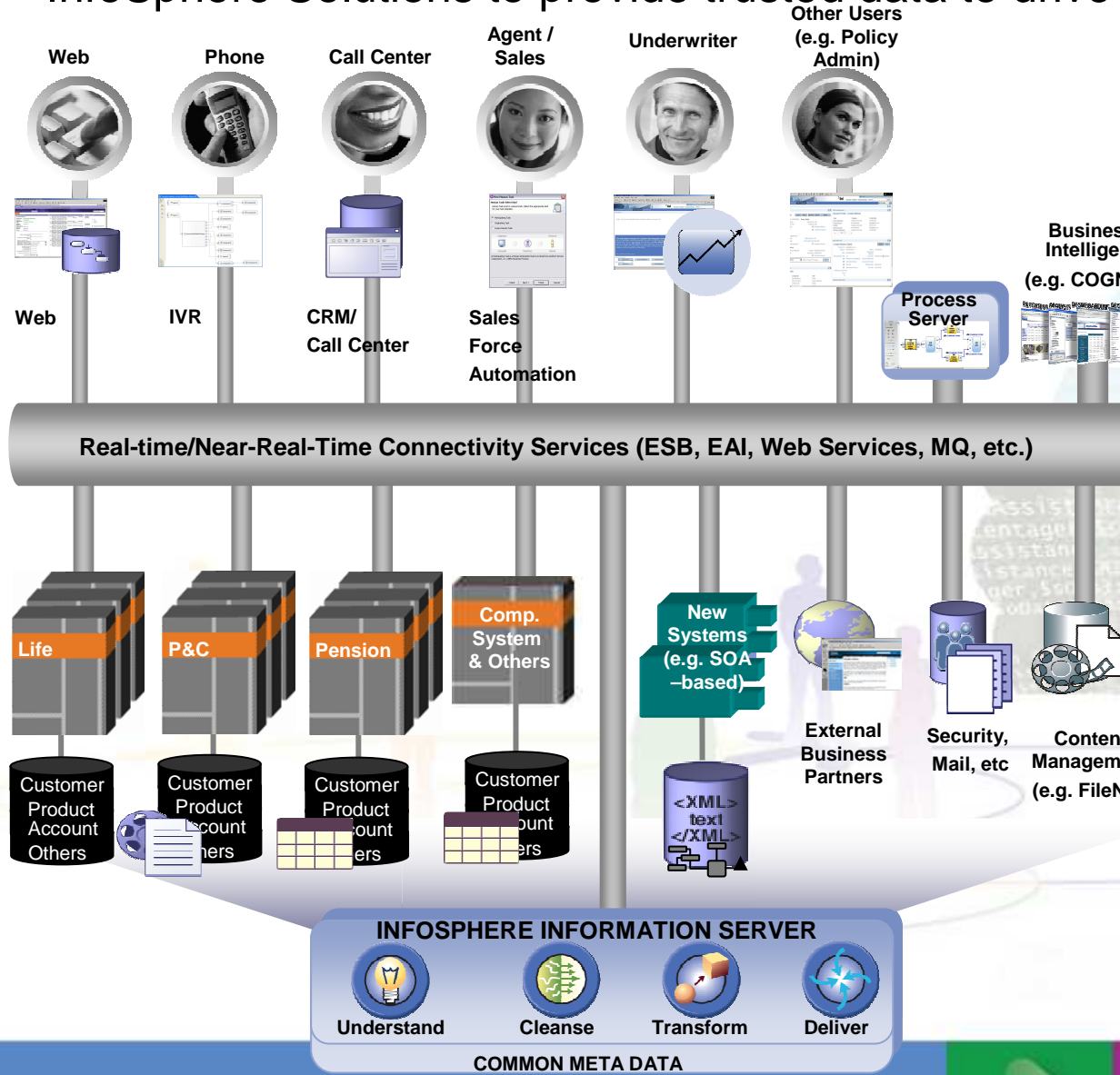


Accurate

Complex and disparate data transformed, cleansed and delivered



InfoSphere Solutions to provide trusted data to drive business optimization ...



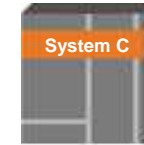
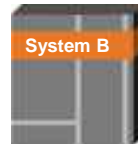
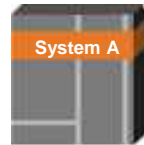
- ## InfoSphere Information Server
- Every capability needed to understand, cleanse, integrate & deliver information across heterogeneous systems
 - Broad native connectivity to any data source
 - Massive scalability for integrating large data volumes in batch or real-time
 - Unique metadata-driven design for acceleration & business-IT alignment





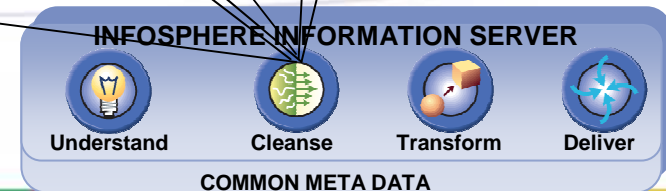
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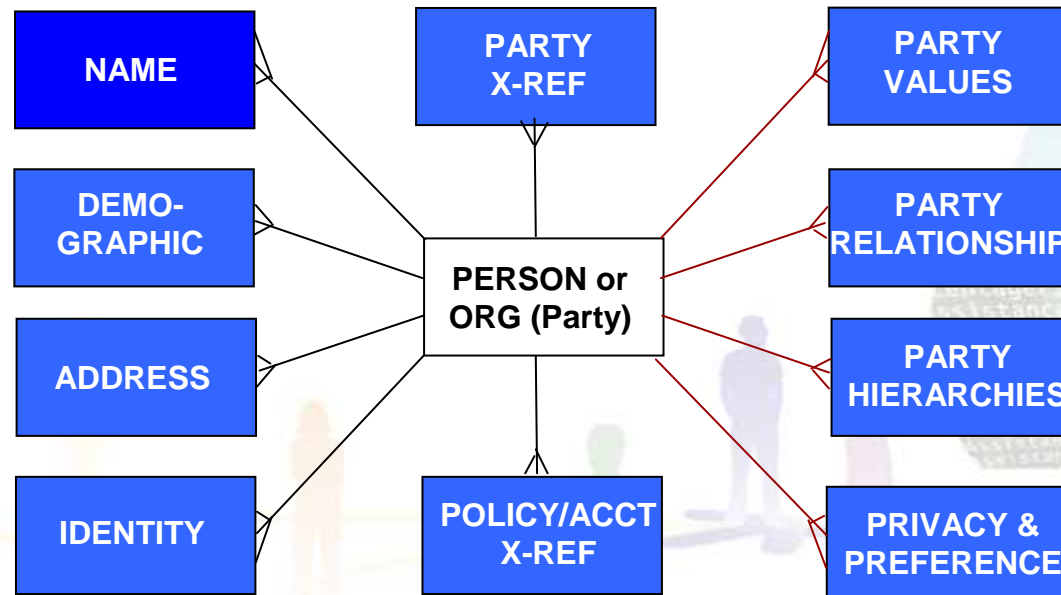
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Gender:	Female	Female	Male	Female
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Address:	1 Main Street, ...	1 Main Street, ...	1 Main Street, ...	2 Main Street, ...

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- ARE THEY RELATED TO OTHER CUSTOMERS?
- IS THE CUSTOMER ALSO AN EMPLOYEE
- WHICH ADDRESS IS CORRECT



Master Data Management

The Path to Managing and Providing Trusted Data...



MASTER DATA ...

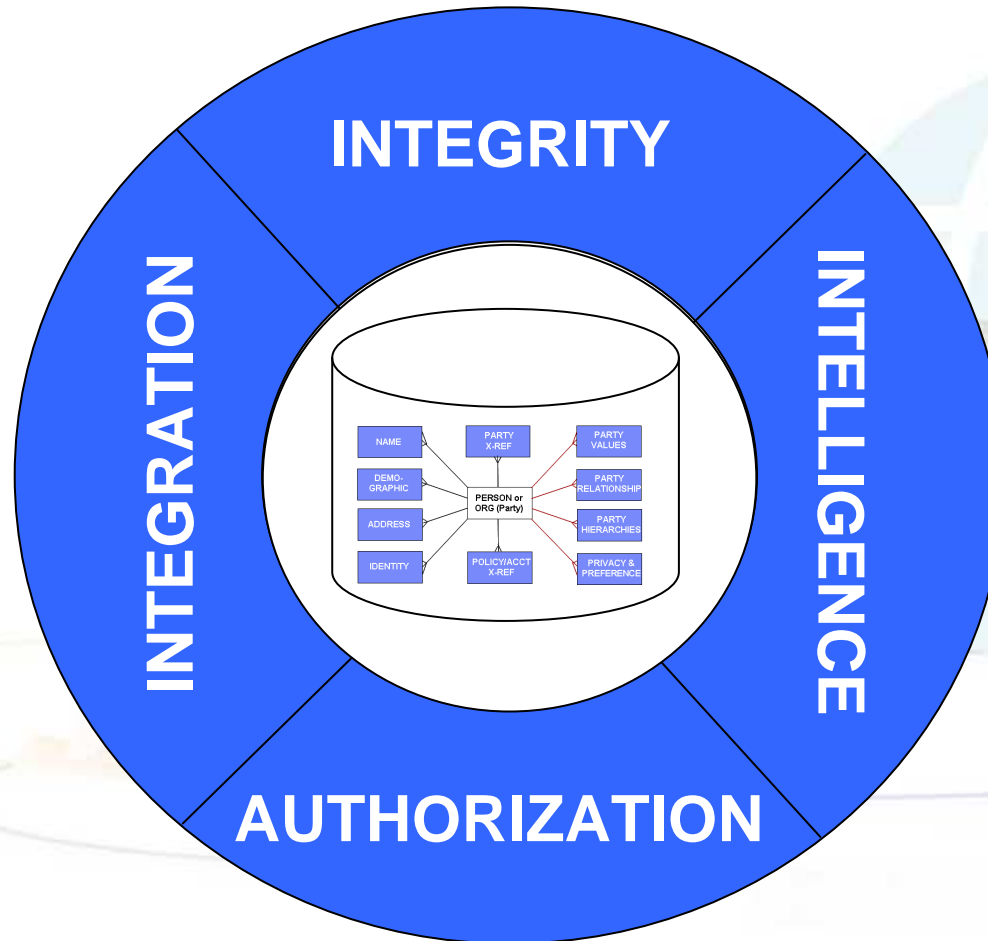
- Common Data
- Directory (X-Ref) Data
- Summary Data



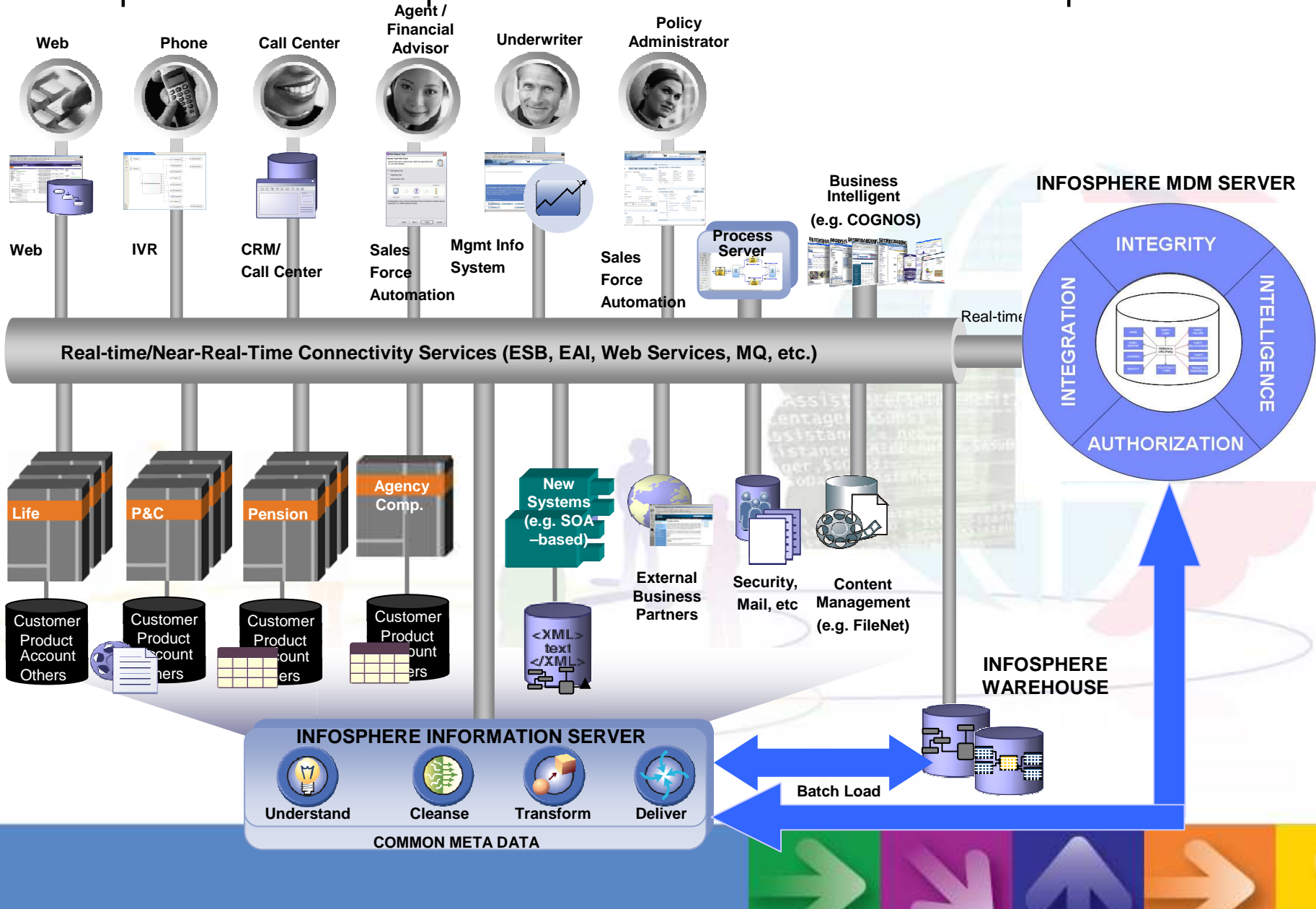


Master Data Management

Centralized Management of Master Data via Services to Provided
Trusted Operational View of Business ...



InfoSphere Solutions to provide trusted data to drive business optimization ...





Phased Implementation

Drive Business Optimization With Positive ROI

Reduce cost and improve customer satisfaction via once-and-done processing ... e.g. address change

COST
REDUCTION

Reduce risk exposure via holistic view customer household and product holdings

IMPROVE
RISK
MANAGEMENT

Improve up-sell and cross-sell with relevant offers meeting customer requirements

IMPROVE
SALES
CAMPAIGN

Comply with government regulations ... privacy act, risk exposure reporting, etc

REGULATORY
COMPLIANCE

Forming a customer chassis to reduce M&A integration points and improve integration speed and cost

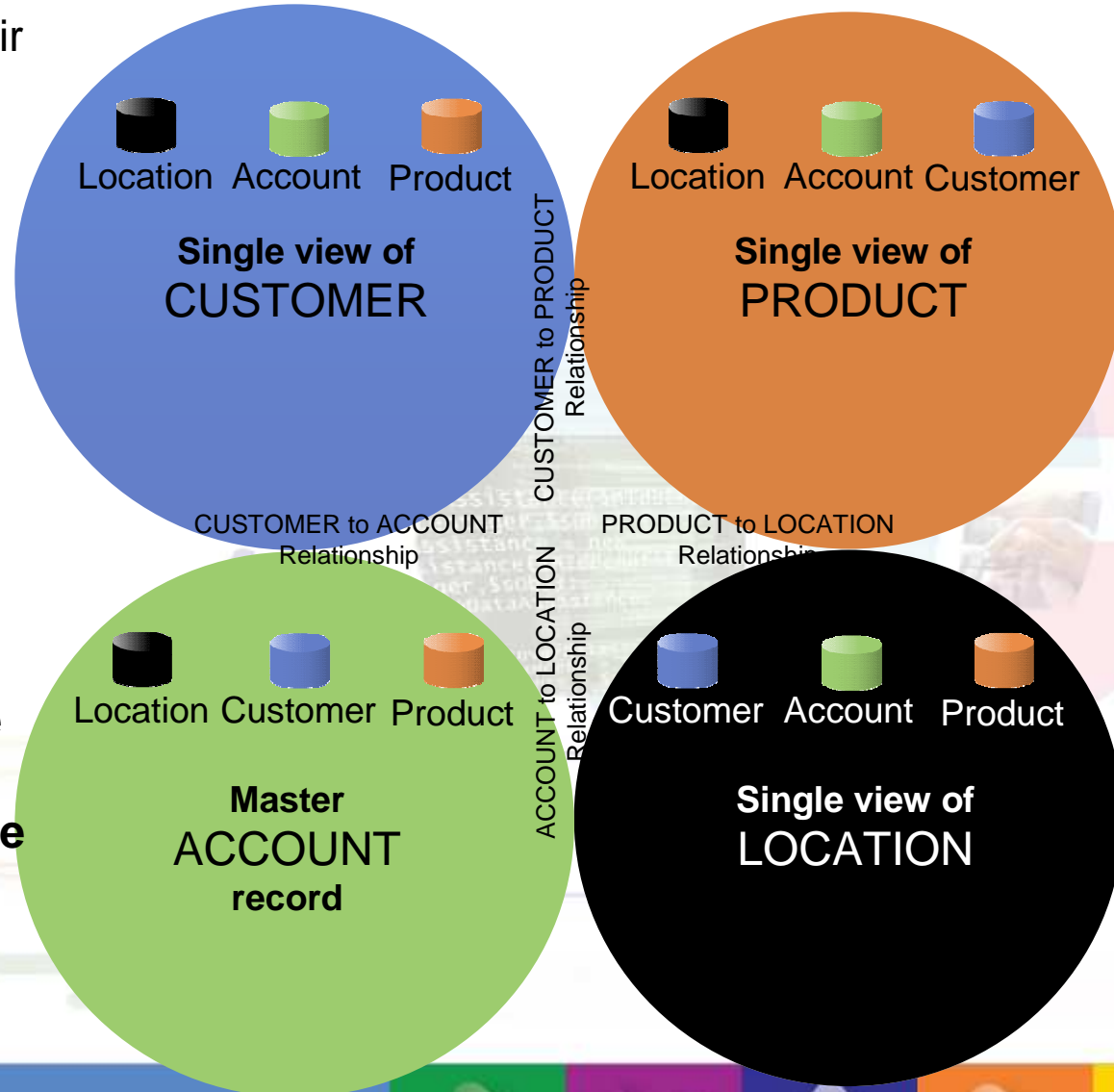
ASSIST
MERGER &
ACQUISITION





MDM Journey Started with a Single Domain

- Most organizations begin their MDM journey with a single narrowly scoped project
- In addition to a primary domain, often secondary domains are managed for a complete understanding
- Data is replicated in these isolated projects



But New Industry Imperatives introduce the need to manage relationships among these domains...so MDM technology must evolve...into multiple domains!



Global Experience

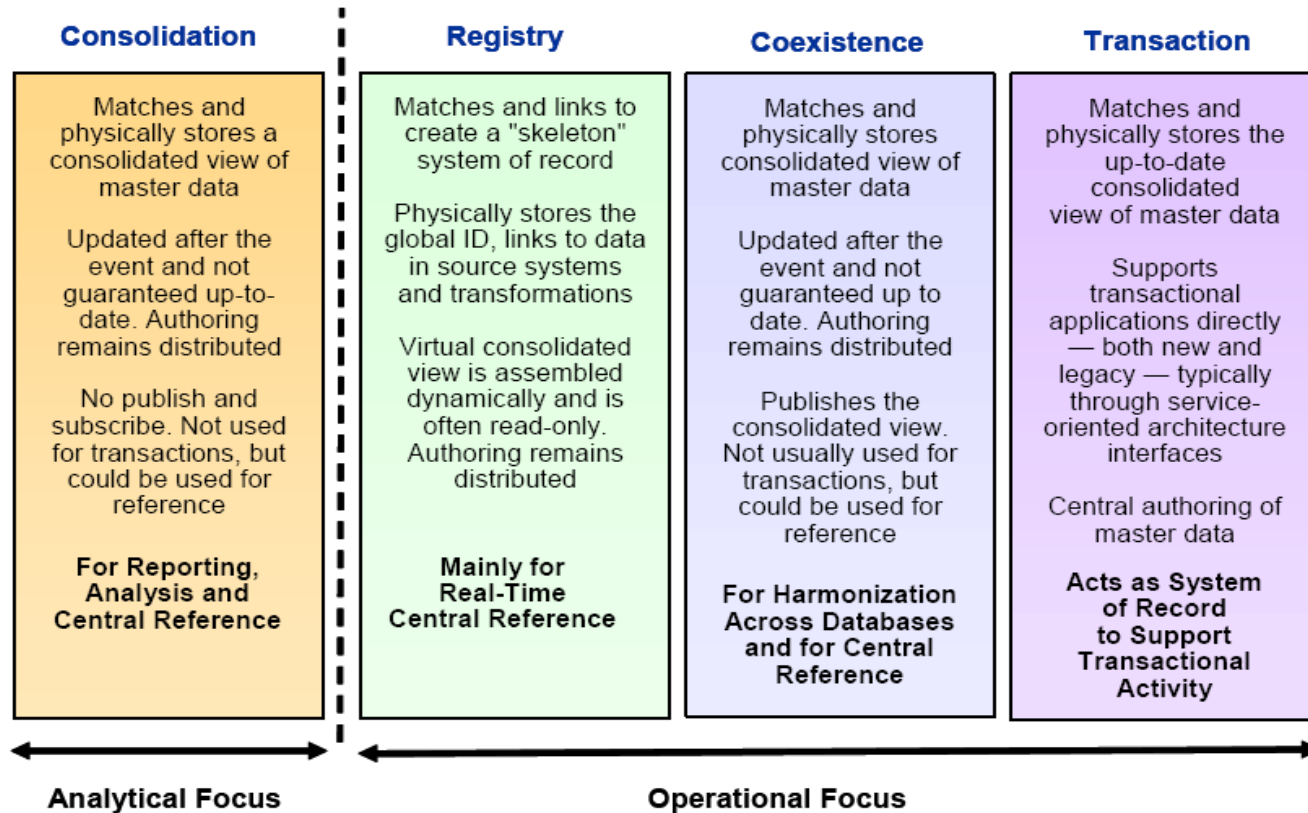




Analyst's Validation

Gartner - Four Architectural Styles of MDM

Figure 1. The Four Architectural Styles of MDM



Source: Gartner (September 2006)

Gartner recognizes the Transaction Hub Style approach to MDM as providing the greatest level of transaction performance capabilities. IBM MDM Server has the flexibility to be implemented in multiple MDM styles including Consolidation, Registry, Coexistence and Transaction.



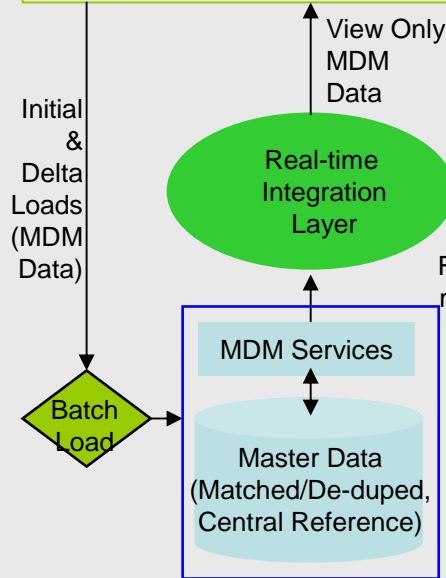
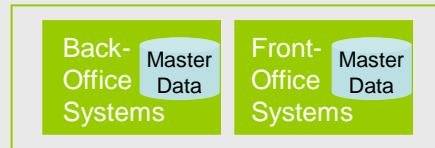


Analyst's Validation

Gartner - Four Architectural Styles of MDM

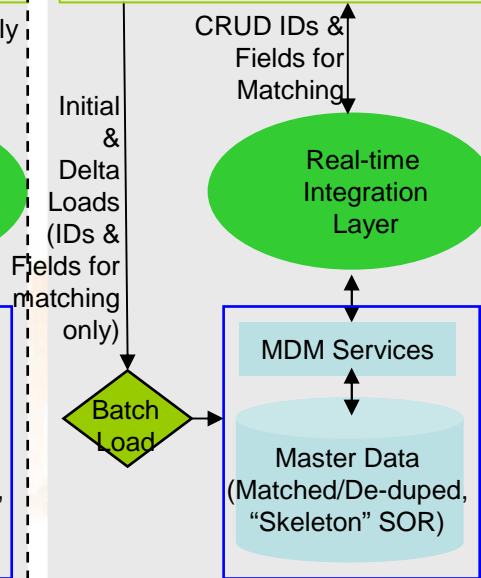
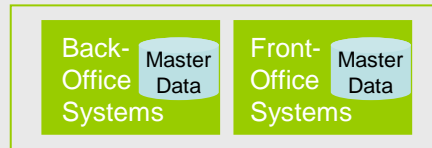
Consolidation

Authoring of master data remains distributed



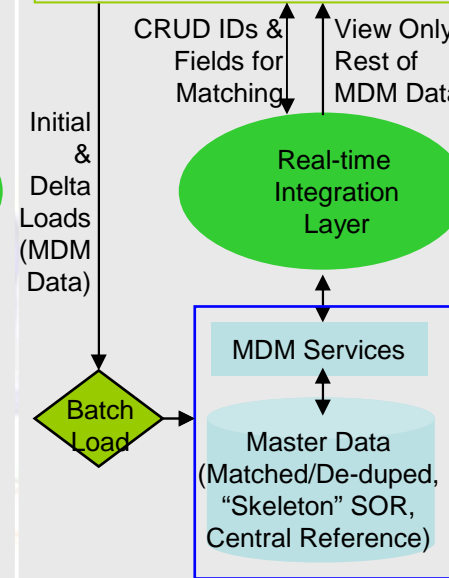
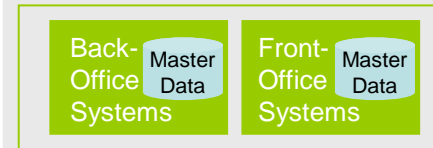
Registry

Authoring of master data remains distributed



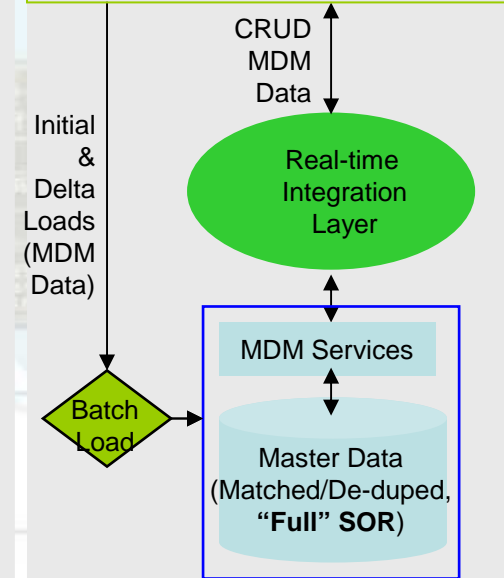
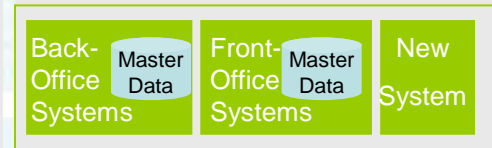
Coexistence

Authoring of master data remains distributed



Transaction

Central authoring of master data



Analytical Focus

Operational Focus





Case Study: Major International Bank

Business Problem

Become more customer centric was/is a difficult challenge due to the five different CIF systems due to M&A. Years ago, attempted to implement single CIF (Know the Customer - KTC) using Siebel CRM data model years ago but not successful.

Volume

100+ million customers (account owners, etc)

Lines of Business

Online Banking, Checking accts, Savings and CD accounts, Debit and Credit Cards, Mortgages, Investment and Wealth Management offerings, Investment and Brokerage Services and Insurance related products.

Infrastructure

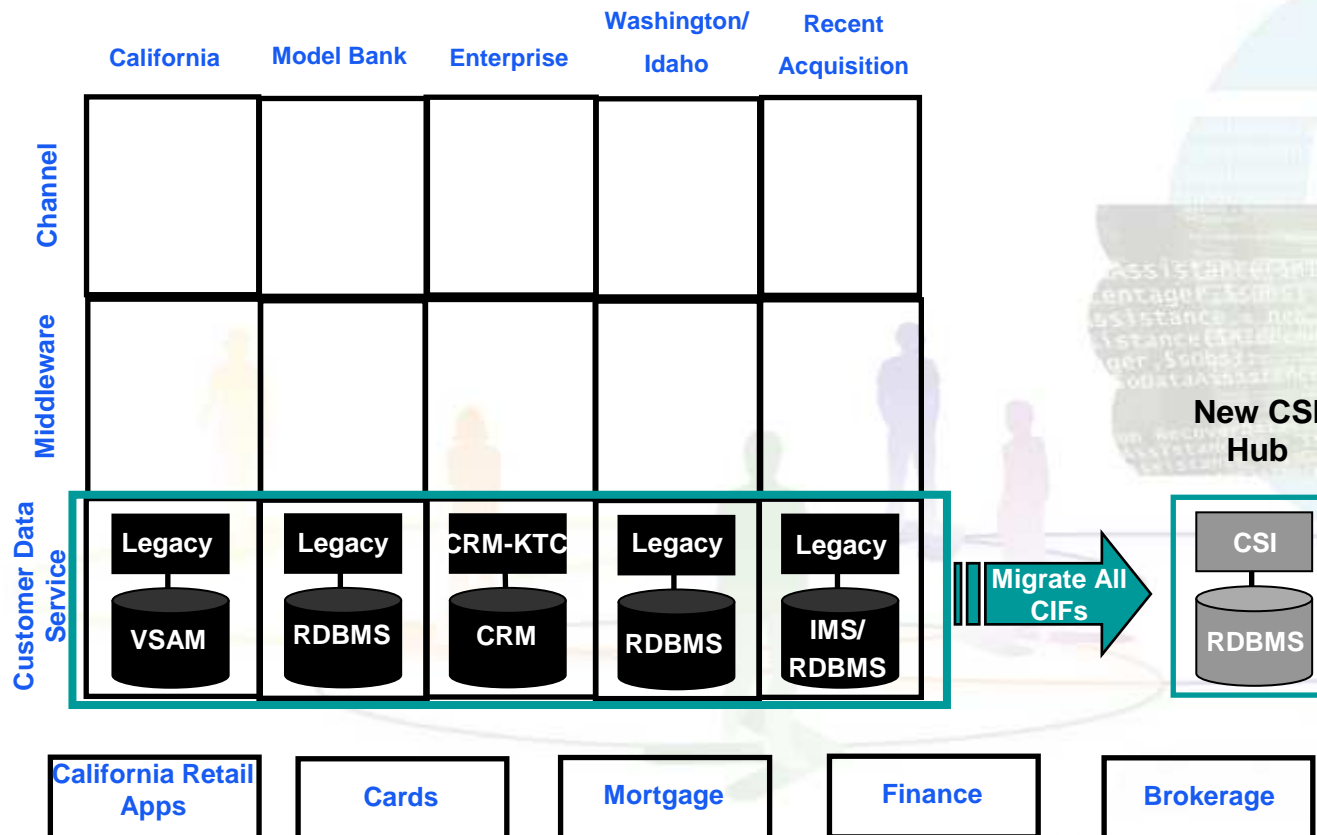
WAS on p-Series, Fast Track Server on zSeries and DB2 on z-Series,



Case Study: Major International Bank

As a result of significant M & A activity, current state customer data environment was duplicative(5 CIFs), complex and costly to maintain

Current Environment – Logical View



- Current environment supports multiple customer data stores with duplicative data
- Associated processes to synchronize data between legacy systems and customer data stores is complex
- Environments and infrastructures are tied to regional and product stovepipes
- There are multiple middleware approaches which are tied to channel and location specific customer data stores
- Cost of maintaining is high
- New target is to migrate all 5 CIFs to new SOA-based CDI-HUB (CSI)



Case Study: Major International Commercial Bank

Business Problem Very high growth business. Inability to understand corporate hierarchies, extent of business and business risk across the portfolio.

Volume 1 million commercial customers (lessee, vendor, mortgagee, etc)

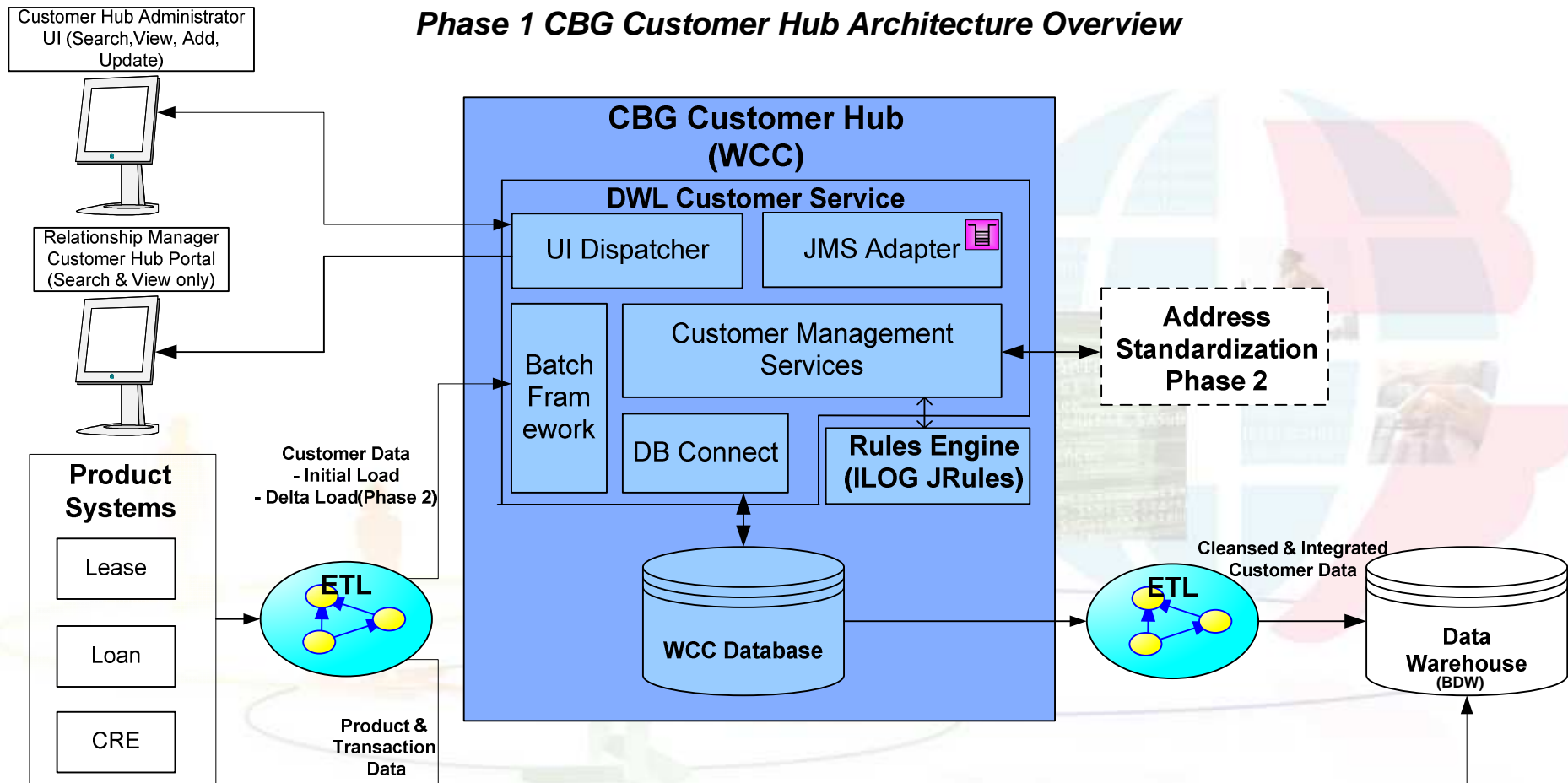
Lines of Business Commercial Banking, Cash Trade, F/X, Investments, Loans and ABF, Equipment Leasing, Real Estate, Cards and Corporate Finance

Infrastructure App server p-Series, Oracle server p-Series, WAS, WMQI, Oracle Integrated with 25 legacy systems, Siebel CRM front end, Data Warehouse and Custom Developed U.I.



Case Study: Major International Commercial Bank

Phase 1 CBG Customer Hub Architecture Overview



Case Study: Major International Insurer

Business Problem

Multiple CIF's throughout multiple lines of business that didn't communicate. Didn't understand customers across portfolio.

Volume

7 million customers initially going to 100 million (insured, beneficiary, etc.)

Lines of Business

Life, P&C, Commercial

Infrastructure

App server p-Series, DB server p-Series, WAS, webmethods, DB2
Integrated with 30+ legacy and external systems

Competition

Siebel, Chordiant, In-house build

Why MDM Server Won

Prebuilt business services, experience with CDI, references

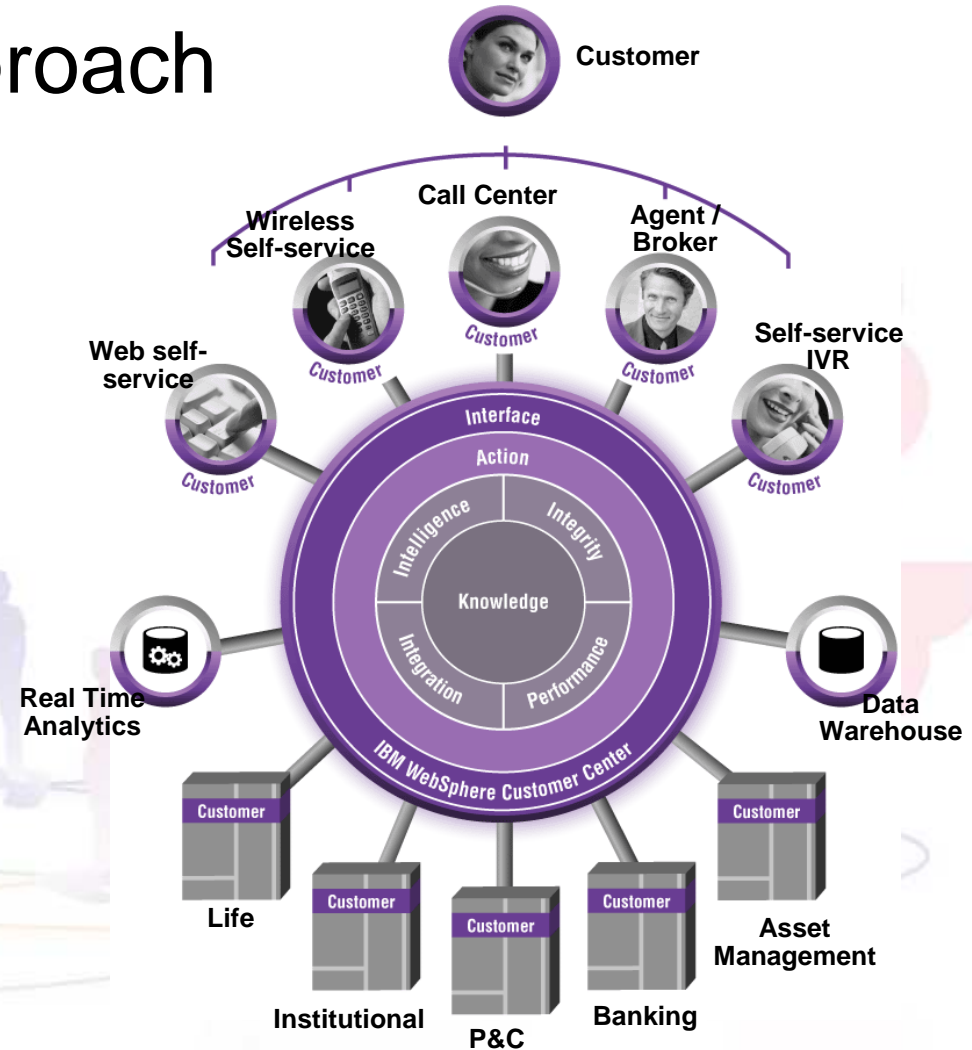




Major International Insurer: Solution

Approach

- The Approach:
 - Implement MDM Server as the customer administration platform
 - Start in Individual Life and Annuities
 - Integrate to Web Methods EAI layer via MDM Server XML Interface
 - Roll out to other lines of business:
 - Institutional (Group Life)
 - Brokerage
 - Banking





Case Study: Dept of Health and Human Services

Business Problem

This city government office was created in early 2008 as a cross-agency for Health and Human Services. Current citizens' data is managed in different systems across nine agencies (health, legal, childcare, etc). Lack of data sharing across these systems created duplicity and inefficiencies for agencies workers and service providers

Health and Human Services Connect (HHS-Connect) program, is a new service being deployed by the HHS office. It is designed to leverage modern and flexible technologies to improve service delivery to citizens, enable better accessibility and management of information, and increase accountability. The program will link more than a dozen city agencies so that caseworkers are able to share client information without compromising confidentiality.

Volume

2+ million users in a city of 11+ million citizens

Lines of Business

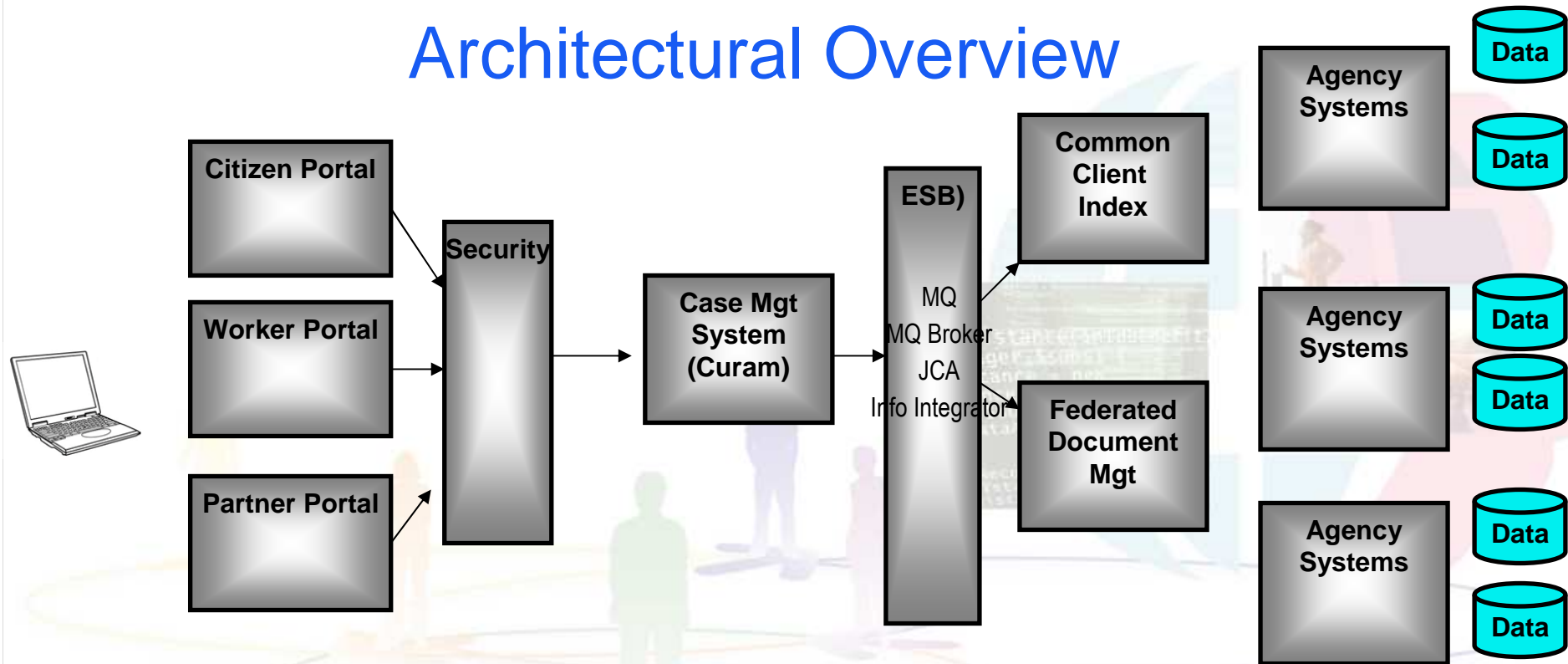
City government providing health and human services





Case Study: Dept of Health and Human Services

Architectural Overview



Case Study: Financial Services Arm of Major Retailer in Canada

Business Problem

Lacked a complete client portfolio. To be able to fuel future growth while becoming more customer centric, this company had to improve its risk management and ability to make customer related decisions.

Volume

3.5 million party records

Lines of Business

Personal Loans, Credit Cards (initially)

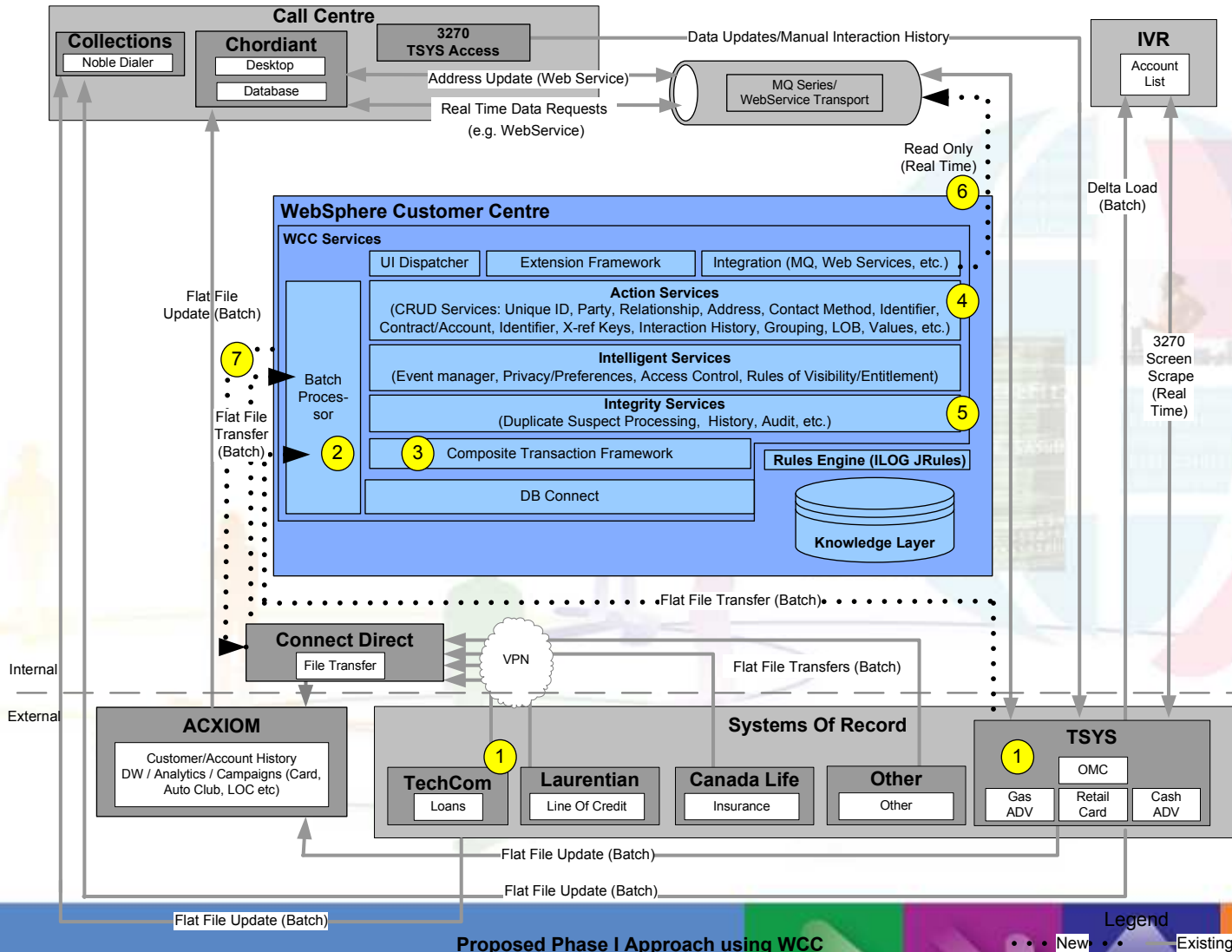
Infrastructure

Chordiant (call centre), TSYS (credit card), MQSeries, WAS (pSeries), Oracle (pSeries), Acxiom





Case Study: Financial Services Arm of Major Retailer in Canada



Case Study: Major Telco in Canada

Business Problem

Account centric model across land line, wireless, cable and internet business.

Volume

12 million customers (retail subscriber)

Lines of Business

Wireline, Mobility, Satellite TV, Internet

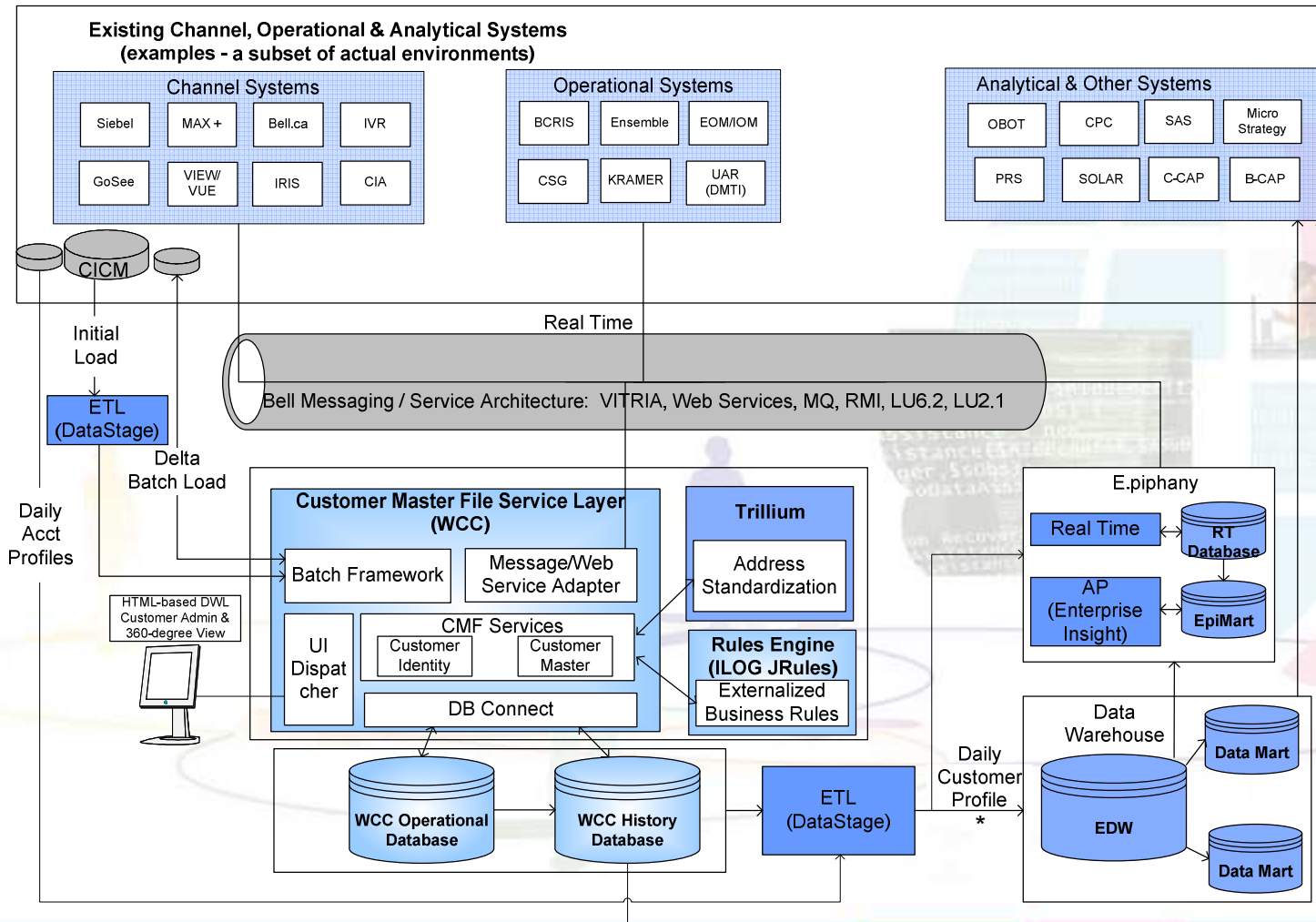
Infrastructure

App server Sun SunFire, DB server Sun SunFire, WebLogic, WBI, Oracle 9i
Integrated with legacy EDW and Web based CSR application



Case Study: Major Telco in Canada

Overview of target architecture with MDM as CMF



* Note:
WCC data maps to Party Base, Location Address, Finance Account and Offer Subscription in Teradata's Telco model



Master Data Management Evolution

MDM For Product Information Management

MDM For Customer Data Integration

Location, Account, Asset, Custom Domains

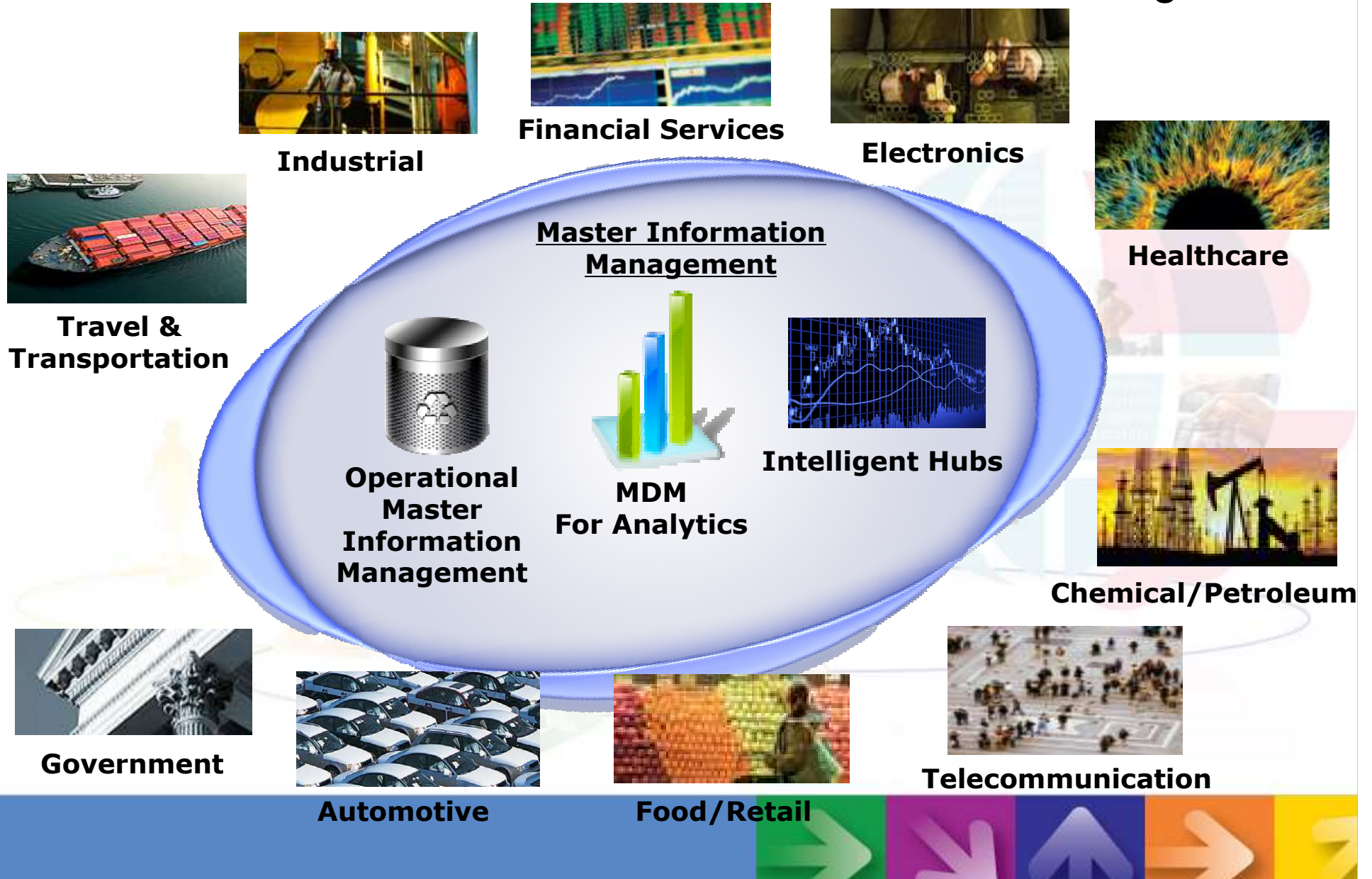
MDM For Analytics

Master Content

Master Information Management



IBM Delivers End-To-End Master Information Management



Operational Master Information Management



Operational Master Information Management



Healthcare



Chemical/Petroleum



Electronics



Financial Services



Industrial



Travel & Transportation



Government



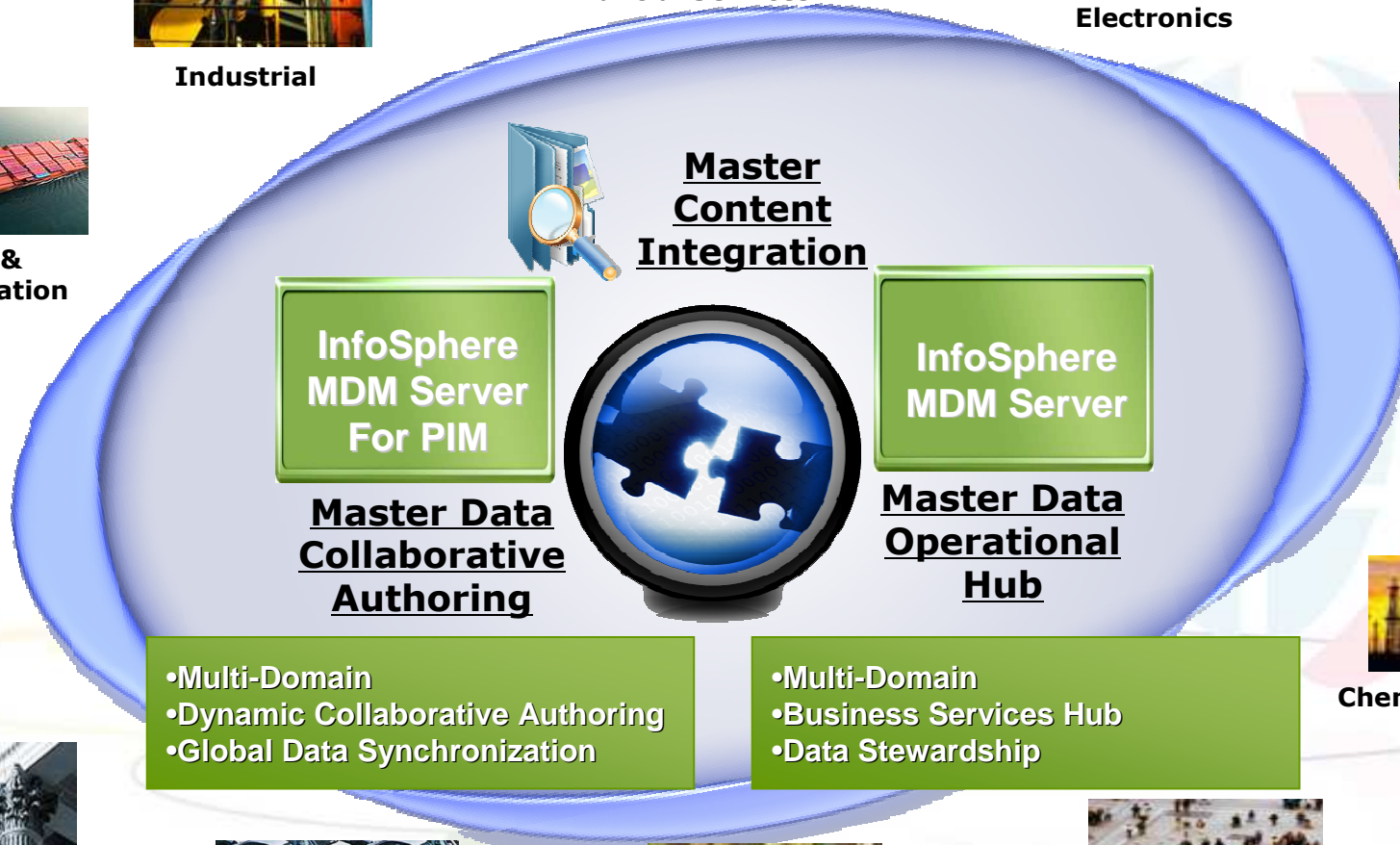
Automotive



Food/Retail



Telecommunication



InfoSphere MDM Server For PIM

InfoSphere MDM Server

- Multi-Domain
- Dynamic Collaborative Authoring
- Global Data Synchronization

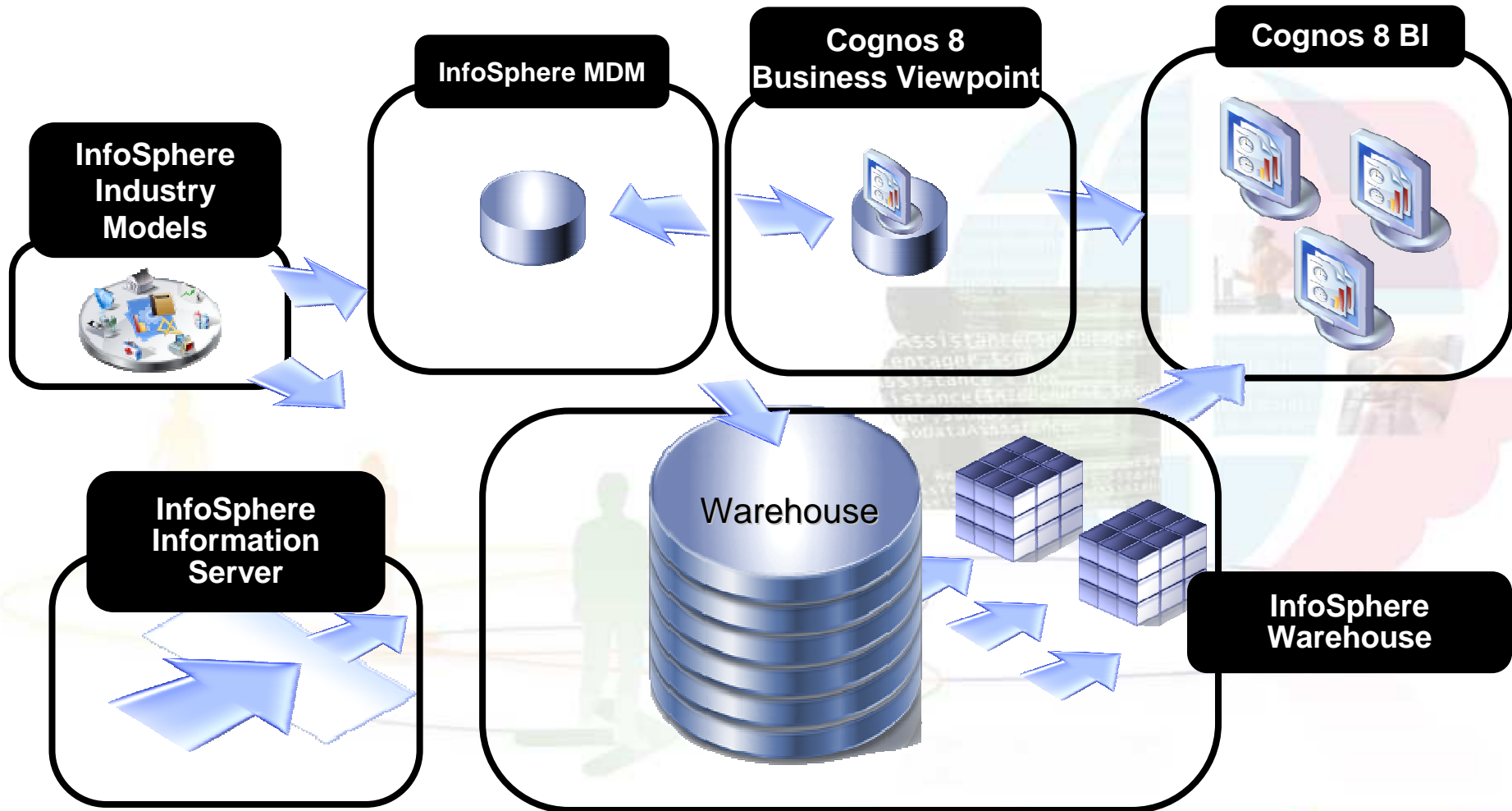
- Multi-Domain
- Business Services Hub
- Data Stewardship



MDM For Analytics



MDM For Analytics





Dimension Management For BI & PM

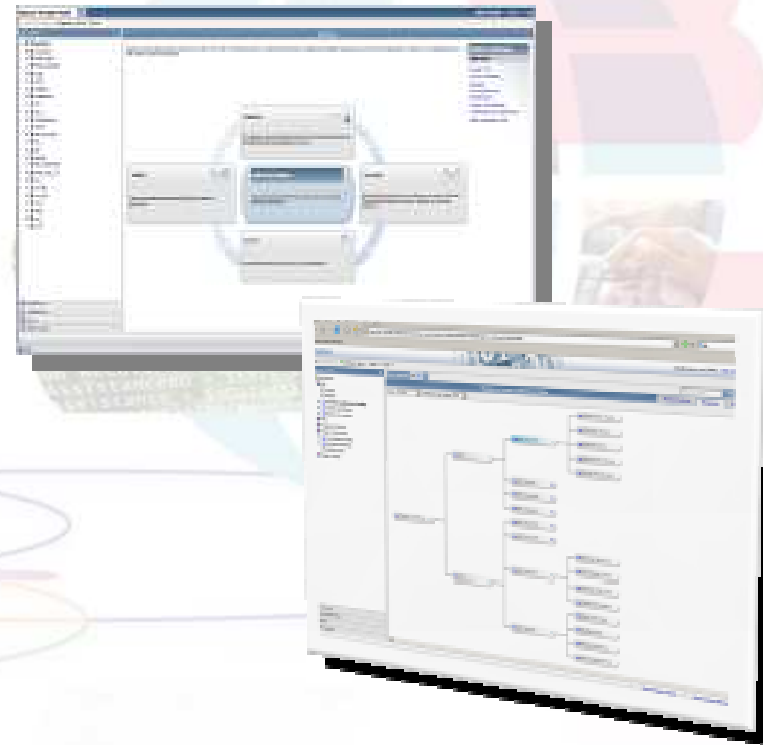


Master Information
For Analytics

- **Cognos 8 Business Viewpoint**

- Enables the business to maintain, govern and share current and future hierarchies and attributes needed to drive analytics

Cognos 8 Business Viewpoint



- **Cognos 8 Business Viewpoint and InfoSphere MDM integration**

- Leverage Master Data with business hierarchies to drive analytics and generate new insight



Intelligent Hubs For Track And Trace Solutions

Track & Trace Analytic Applications

Scorecards

Dashboards

Reports & Alerts

- ▲ Container
- ▲ Container Losses
- ▼ Cycle Times
- ▲ Aged Inventory



Intelligent Hubs

InfoSphere Traceability Server

Information Models

Track & Trace

Party

Product

Location

Platform





MDM Directional Themes

- Master Information Management Across All Use Cases And Domains
- Deeper Industry Awareness (e.g., Industry Packs)
- Integration Across Information Management Portfolio



IBM InfoSphere Master Data Management

Achieve better business outcomes with a single version of truth

Smarter

Provide timely, accurate and complete information

- Make decisions based on a complete and trusted view of the business
- Integrate with Content Management for more in-depth information
- Incorporate Master Data in business analytics to generate greater insight

Easier

Deliver results quickly and efficiently

- Start with the capabilities you need now, grow as your needs grow
- Reduce cost, risk and time to value with streamlined deployment
- Be more productive with an intuitive and extensible user interface

Adaptive

Address changing business requirements

- Deploy one or more pre-built domains for Party, Account or Product
- Create custom-built domains for industry or company specific data models
- Integrate with a broad spectrum of business processes for greater impact



धन्यवाद

Hindi
Hindi

多謝

Chinese

ขอบพระคุณ

Thai

Спасибо

Russian

감사합니다

Korean

Gracias

Spanish

شكراً

Arabic

Thank
You

English

Obrigado

Brazilian Portuguese

Danke
German

Merci
French

Grazie
Italian

நன்றி

Tamil
Tamil

ありがとうございました

Japanese

Terima Kasih

Malay / Indonesian

