



## MDM Discovery Questionnaire

**Strategic**

- What are the strategic goals/ objectives of the organization currently?

- What are the top strategic business initiatives currently that support the above?

- What are the top strategic IT initiatives currently that support the above?

- How does this initiative align to the strategic business/ IT initiatives outlined above?

- Is this a business, IT or jointly driven initiative?

- What prompted this initiative? Is there an impending event?

- Are there existing initiatives (business or IT) underway that may impact this initiative in some way?

<ul style="list-style-type: none"><li>• Are there future initiatives under consideration that may be relevant to or impact the current initiative?</li></ul>
<ul style="list-style-type: none"><li>• Is this initiative part of a larger overall initiative or stand-alone? If part of a larger initiative, what are the timelines and interdependencies?</li></ul>
<ul style="list-style-type: none"><li>• What are some of the risks associated with this initiative?</li></ul>
<ul style="list-style-type: none"><li>• What are the risks associated with not doing the initiative?</li></ul>
<ul style="list-style-type: none"><li>• Have any success criteria been defined for the initiative? If so, what are they?</li></ul>
<ul style="list-style-type: none"><li>• How will each success criterion be measured, i.e. what determines if success has been achieved?</li></ul>
<ul style="list-style-type: none"><li>• Who is the Executive Sponsor of this initiative?</li></ul>
<p><b><u>Business Section</u></b></p>

<ul style="list-style-type: none"><li>• What are the critical business challenges/ pains this initiative is attempting to address?</li></ul>
<ul style="list-style-type: none"><li>• Who within the organization is affected by these pains?</li></ul>
<ul style="list-style-type: none"><li>• What happens if the challenges outlined above are not addressed?</li></ul>
<ul style="list-style-type: none"><li>• What benefits are expected as a result of this initiative: e.g. increase revenue; decrease costs, regulatory, etc.?</li></ul>
<ul style="list-style-type: none"><li>• Have detailed business requirements been defined?</li></ul>
<ul style="list-style-type: none"><li>• What is the scope (Organizational/ Geographical)?</li></ul>
<ul style="list-style-type: none"><li>• Is there a multi-national / multi-lingual requirement?</li></ul>
<ul style="list-style-type: none"><li>• Has a business case (ROI) been put in place for this initiative? If so, what are its components? If not, are there any plans to develop one?</li></ul>

- Who are the business sponsors of this initiative?

- Please outline any other critical business considerations relevant to this initiative

**IT Section**

- What is the overall vision/ strategy of IT within the organization?

- Describe the critical IT pains/ challenges this initiative is trying to address?

- Who within the organization is affected by these pains/ challenges?

- Have detailed IT requirements been defined?

- Who will be the users of the selected MDM solution?

<ul style="list-style-type: none"> <li>Is someone in the organization responsible for Data Reliability, such as a Data Steward? If not, are there plans to create such a role?</li> </ul>
<ul style="list-style-type: none"> <li>Which applications will be interacting with the data stored in the selected MDM Solution? What will be the data sources and data targets?</li> </ul>
<ul style="list-style-type: none"> <li>What is the nature of these applications? Are they mission-critical?</li> </ul>
<ul style="list-style-type: none"> <li>What data entity(s) will be affected by this initiative?</li> </ul>
<ul style="list-style-type: none"> <li>What are the volumes for those entities?</li> </ul>
<ul style="list-style-type: none"> <li>What is your current IT infrastructure? (OS, DB, AS, DW, BI, EAI, DI/DQ, 3rd Party Enrichment Providers, Data Modeling, WF)</li> </ul>
<ul style="list-style-type: none"> <li>Have there been data management/ cleansing initiatives in the past? If so, how successful were they? Lessons learned?</li> </ul>
<ul style="list-style-type: none"> <li>Is there a SOA strategy and/or vision in place for the organization?</li> </ul>

<ul style="list-style-type: none"><li>• Is there a data governance strategy and/or vision in place for the organization?</li></ul>
<ul style="list-style-type: none"><li>• Are there any plans to retire any old systems? Is retirement of existing systems expected to be part of the scope of this initiative?</li></ul>
<ul style="list-style-type: none"><li>• Who are the IT sponsors of this initiative?</li></ul>
<ul style="list-style-type: none"><li>• Please outline any other critical IT considerations relevant to this initiative</li></ul>

## **MDM Business Value Drivers and Benefits**

### Growth

- Determine and execute on opportunities for optimization
- Provide a consistent experience across all user touch points
- Identify high-value areas for priority service

### Agility

- Speed time for new application development / introduction
- Enable faster and more accurate user on-boarding

### Spending

- Eliminate extra expenses due to multiple / erroneous records
- Consolidate duplicate customer records
- Rationalize systems and applications from related organizations

### Compliance

- Support user opt-in and privacy preference programs
- Enable prompt and accurate audit reporting
- Synchronize with data sources from other ministries