



Confidence in a connected world.



Master Data Management @ Symantec

Product & Customer Data Management

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- About Symantec
- Master Data – A definition
- PDH and CDH in Symantec
- Business Drivers for PDH Implementation
- Business Drivers for CDH Implementation
- Where we are
- Competitive Comparison – PDH
- Lessons Learned

Appendix

- Key Oracle differentiations
- Key functionalities Symantec needed
- Options for implementations
- Gartner's Magic Quadrant for PIM



Our Goal



Secure and Manage the World's Information

Symantec At-A-Glance



Founded in 1982, IPO in 1989

**More than 17,500 employees
in more than 40 countries**

**Launched 100 new products
and services in FY07**

**World's 4th largest
independent software company**

**Serves 99% of
the *FORTUNE* 1000**

**More than 50 million active
consumers**

**~ \$6 billion in revenue
in Fiscal FY08**

70% enterprise revenue

**Invests 15% of revenue
into R&D**

**More than 400 patents
worldwide**

- Master Data – Definition

- *A system of business processes and technology components that ensures information about business objects, such as materials, products, employees, customers, suppliers, and assets, is current, consistent, and accurate wherever they are used inside or exchanged outside the enterprise*

- *In Symantec, two areas have been identified for Master Data. And, these are:*

- *Product*
 - *Customer*

- *Both implementations have selected one vendor:*

ORACLE®

- Why PDH @ Symantec
 - Operational efficiencies in ‘Time-to-Market’
 - Segregation of Master data for EBS focus on transactions and paving the way for easier upgrades of EBS
 - Simply, unique Symantec issues about Product and Price
 - End State of Product data within Symantec is too good to resist
- Why CDH @ Symantec
 - *Single source of truth about Customer*
 - *Future state of CDH is too rosy to resist (from business roadmap)*
 - *Again, unique Symantec issues about Customer record and numerous data issues requiring DQ solution*

- Why Hubs are required
 - Gartner and Industry Research reports proved the advantages of maintaining clean master data
 - As companies grow their need to keep the master data in clean-state is becoming paramount
 - Numerous applications needing to have a single source of truth in Hub-Spoke model
 - Sheer need to have governance and its necessity to have the truth in one instance
- Why Oracle Products?
 - Comparative analyses showed superior results favoring Oracle
 - Our in-house Oracle foot-print in EBS
 - Strategic Implementation Partner
 - Outstanding collaboration from Oracle Sales Team
 - 12C version of PDH offered almost ~ 80 % of business requirements
 - Technology superiority in terms of Fusion, AIA etc...

- Operational issues
- Manual processes
- Lack of single source of truth
- Volume is an issue
- Data Quality issues
- Loss of Revenue
- Customer dissatisfaction
- Centralization of “Product” information
-
- → *See Appendix for some of these details*

- Too many duplicate records, data cleansing is a necessity
- Too many systems to be claimed as Customer Masters
- Data errors
- Loss of Revenue
- Customer dissatisfaction
- M&A activity – and integration issues
-

Competitive Comparison - PDH



Product Area	SAP MDM 5.5	IBM	ORACLE PIMDH
Enterprise Data Model to House Master Data	No (separate A2i DM)	No (Trigo DM)	Yes (Built on top of EBS)
Data Quality	Partner	Ascential	In-built/Partner
Search and Access	Scalability Issue (Memory searches)	Search but limited security	Yes (with granual security)
Open EAI Technologies	No (Netweaver)	Yes	Yes
Supports the Mgt of Master Data	Windows UI and Customized Portals	Yes (Not configurable)	Yes (Allows end-user configurable UI)
Out of box rich product model	No	No	Yes (seeded 500+ attributes)
Inside,Sell Side, Buy-side support	No (only limited sell-side)	Yes (buy-side and sell-side)	Yes (all)
Data Governance	No	No	Yes(UI configurable workflow templates)
Referencability	Limited (A2i customers)	Yes (GGB, Toshiba)	Yes (GGB, Toshiba)
Industry Functionality	Defocused on breadth	Retail and Financial focused	Depth of Industry- Retail, CPG, Mfg, Telco

- PDH
 - In User Acceptance Testing Phase
 - Quality Assurance Testing is happening in parallel
- CDH
 - In Business Analyst Testing phase

- *Know the Release well enough (12C vs. 12 vs. 12.1 etc)*
- *Have an implementation partner who is experienced enough → See Gartner recommendation*
- *Get your groundwork before the initiative*
- *Have your Architecture team on your side, well before the game starts*
- *New technologies pose newer (far sharper) challenges, so be prepared*
- *Data Governance is a key to a successful hub in any large enterprise*
- *Mature your business customers on the concepts, wait until then*
- *Strong leadership/sponsorship is a must*
- *Visibility to the program/s in the highest echelons of the company*



Appendix

- Provides an integrated MDM solution with Fusion Middleware to support PIM, MDM, SOA and broader EIM needs of organizations
- Scalable, Robust, UI Extensible and comprehensive Product Record for all industries (product and service based), use cases (buy-side, in-side and sell-side) and business models
- Verticalized offering/functionality for each industry to satisfy key initiatives and drivers
- Flexible deployment architecture for different options – registry, co-existence, transactional, analytical, reference, and same instance (foundation for SCM, CRM or ERP)
- Strategic path to Fusion –key component for customers to integrate Oracle applications (and other apps) till Fusion and foundation for SOA based next generation Fusion applications

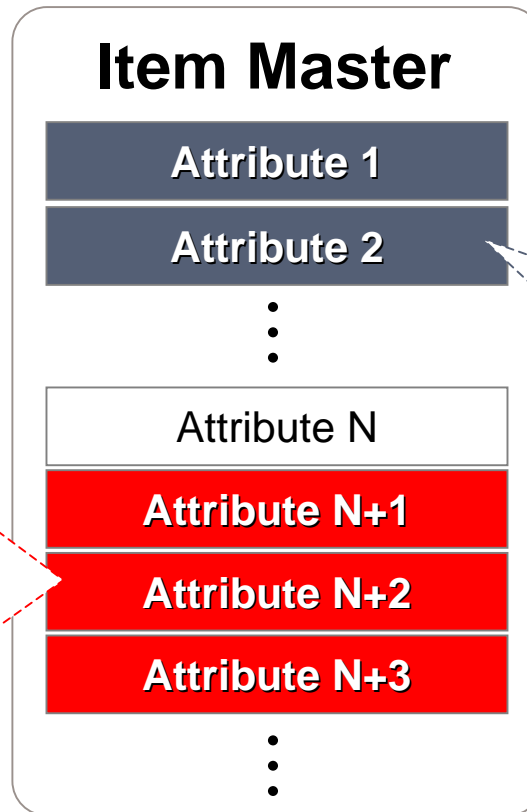
Extensible Category Attribute

Add User-Defined Attributes to Capture All Product Information



Extensible Attributes

- Define to meet enterprise needs
 - Form / fit / function
 - Sales and Marketing
- Create as many as required
- Support multiple formats (e.g., number, date, string, multi-row)
- Tie to user-defined functions
- Add easily via intuitive UI for business process administrators



ERP Operational Attributes

Base attributes for inventory, planning, distribution, sales, etc.

Item Master and Alternate Catalogs

Classify & Organize All Products and Components



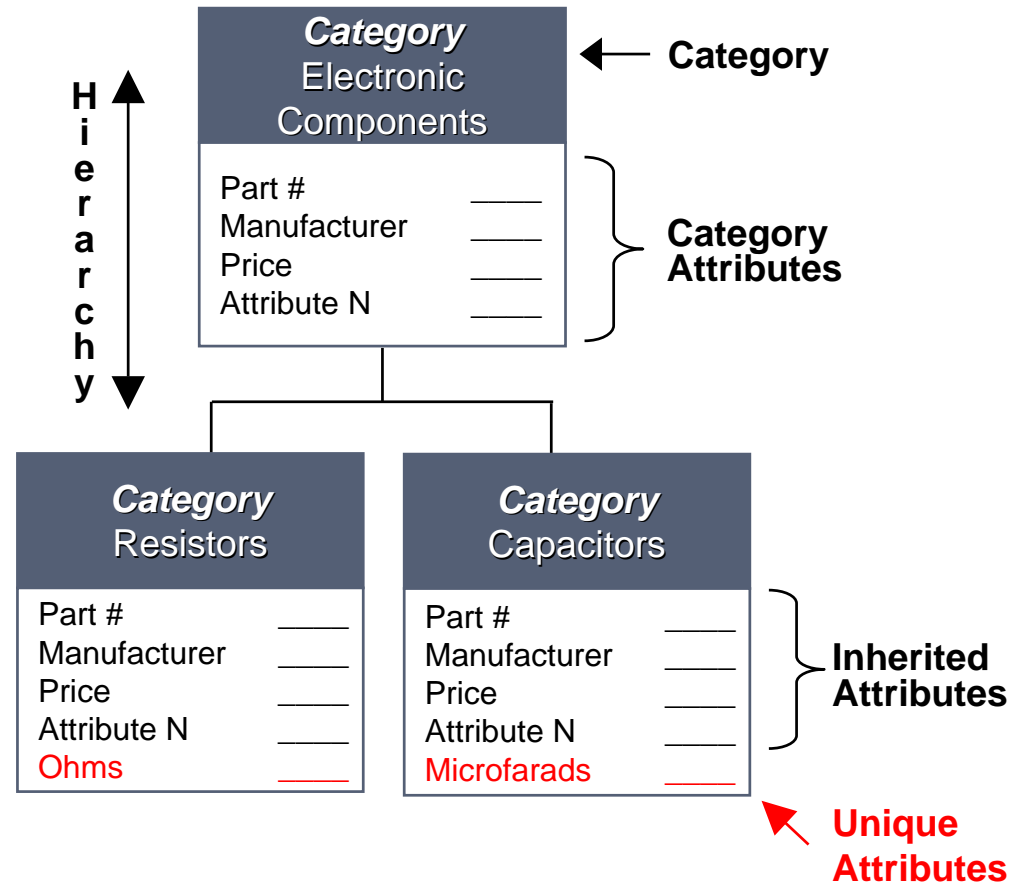
Classify Products & Components in Primary Item Master Catalog

- User-defined category hierarchy
- User-defined attributes for each category
- Attribute inheritance for easy maintenance

Assign Items to Multiple Alternate Catalogs to Support Business Activities

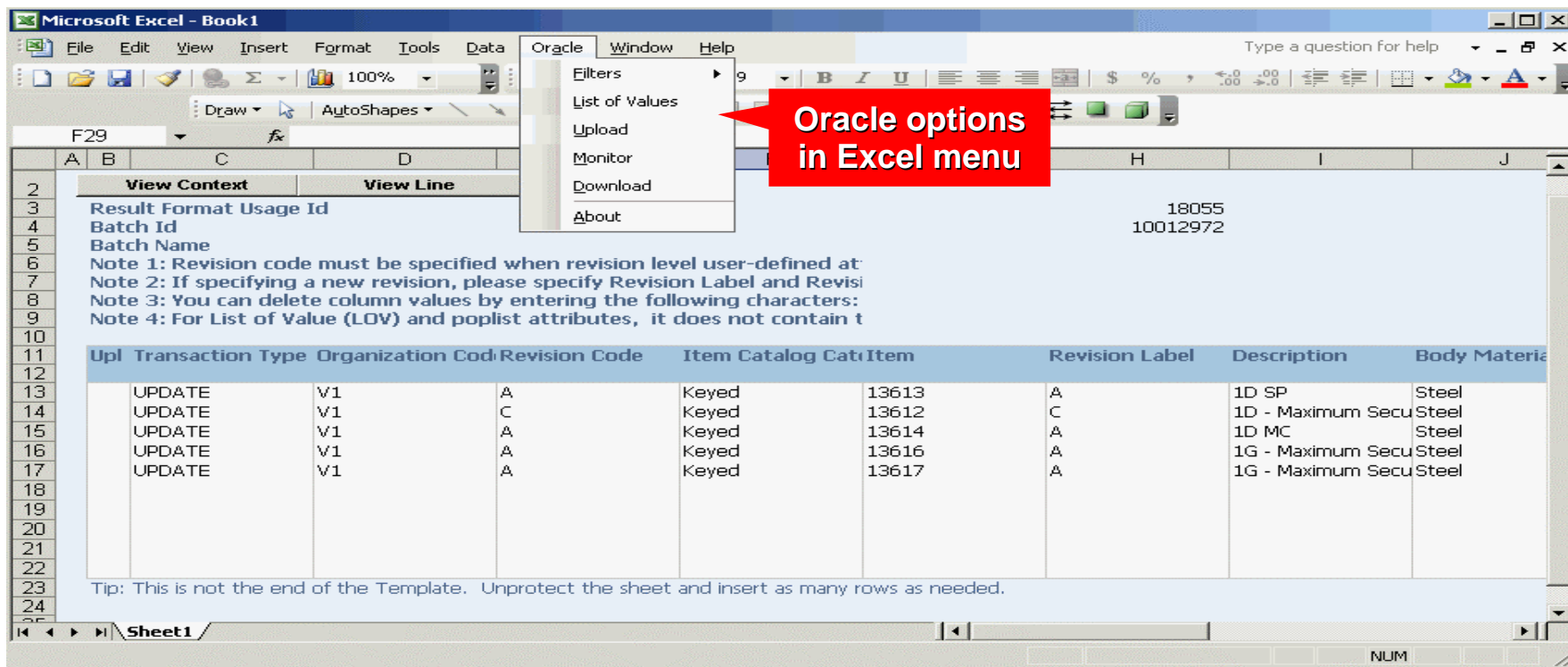
- Supplier catalog
- Web store catalog
- UNSPSC categorizations
-
-

Item Master Catalog



Spreadsheet Import Solution

Easily Upload and Change Product Information via Excel



• Import from / export to Excel

- Role security
- Category assignments
- Specifications
- Organization assignments

• Make attribute changes in Excel and upload directly to repository

• Automatically cleanse and standardize data*

*Partner offering: DataLens™ System from Silver Creek Systems

Broad Data Quality Tools

Maintain Clean, Accurate Enterprise Product Data



Data Standardization



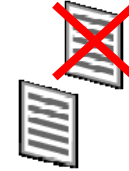
- Extract & standardize attributes
- Classify in Item Master and alternate catalogs
- Apply industry & company stds

Matching Engine



- Run exhaustive searches using customizable engine
- Identify duplicates and prevent future occurrences

Duplicate Resolution



- Merge item records to prevent duplicates in product data repository



Data Quality Tools

Auto Gen & Validation



- Normalize data via item # and description generation rules
- Apply user-defined validation rules at all data entry points

Workflow



- Step-by-step new item definition and approval processes
- Product change control

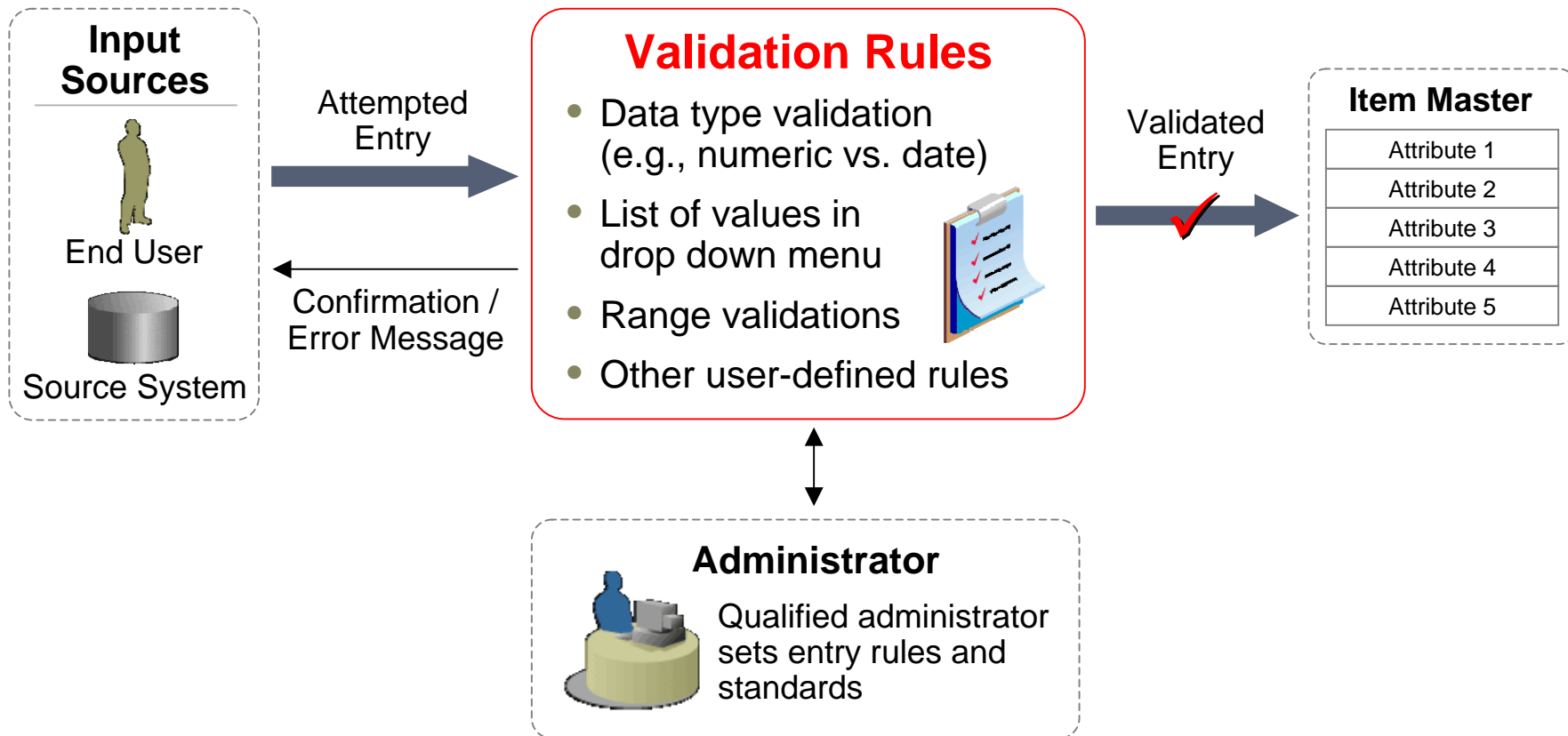
Item Purge



- Remove unwanted records to reduce data volume

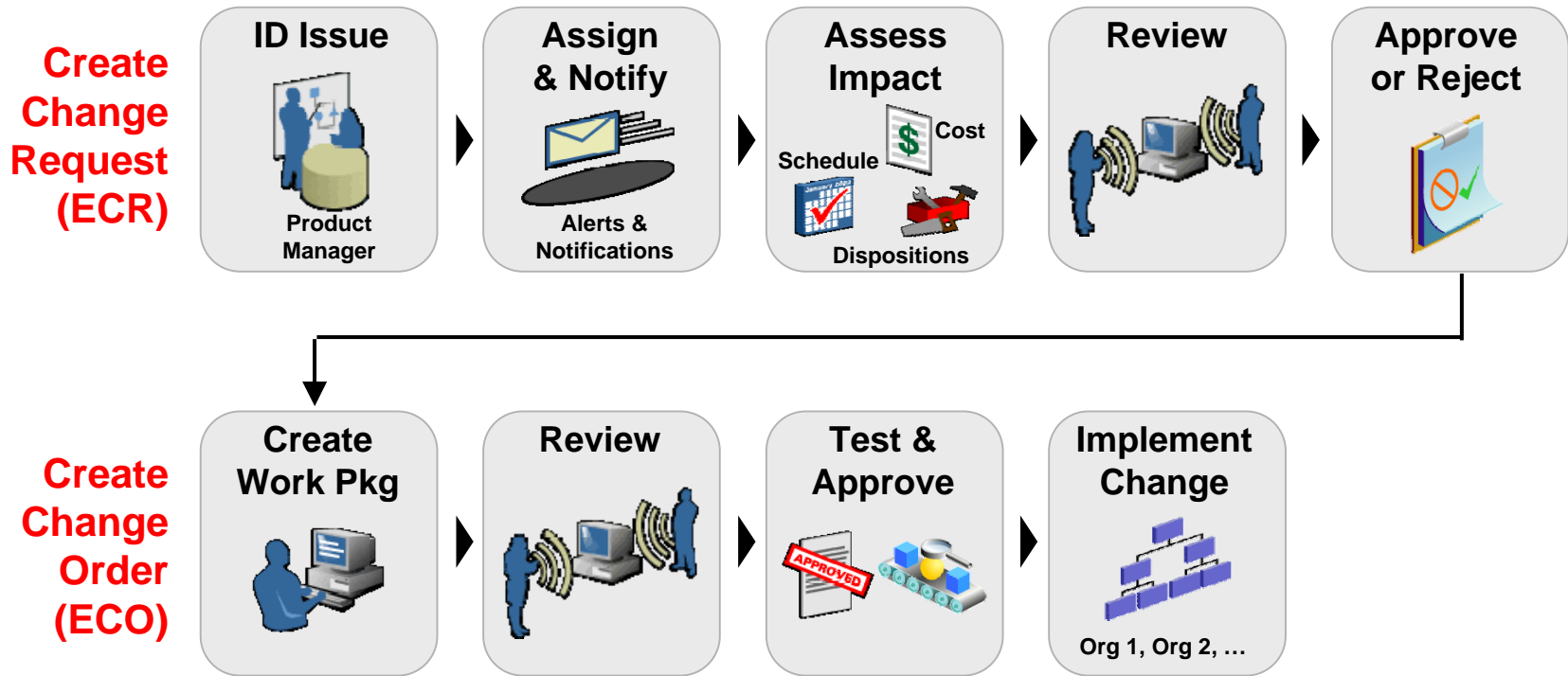
Attribute Validation Rules

Improve Data Quality at Point of Entry



Workflow-Driven Product Change Process

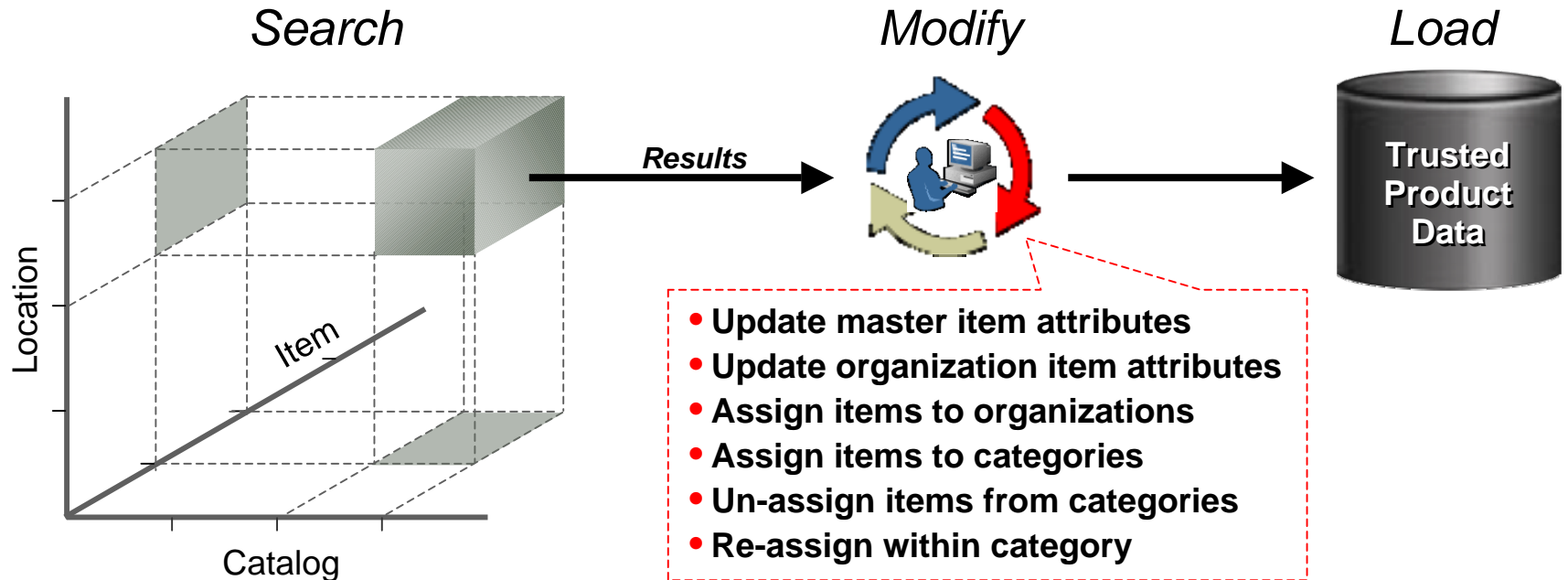
Eliminate Errors and Delays with Process Automation



- User-Defined Change Types
- Streamline Review and Approvals
- Facilitate Multi-Company Collaboration

Mass Data Updates

Rapidly Apply Changes to Groups of Items Meeting Specified Criteria



Examples

- Update standard cost for a set of items in the same product line
- Assign SKUs to stores or warehouses based on organization hierarchy
- Re-classify spend category for a set of items in the procurement catalog
- Inactivate multiple SKUs based on end-of -life criteria

- Option 1: R12C PIM, 3 instances (Oracle proposed)
 - R12C PIM, R12 MDM, EBS
- Option 2: R12 PIM, 2 instances (Oracle proposed)
 - R12 MDM, EBS
- Option 3: R12C PIM 2 instances (Symantec proposed)
 - R12C PIM, EBS

Option 1

R12C, 3 Instances (Oracle Proposed)

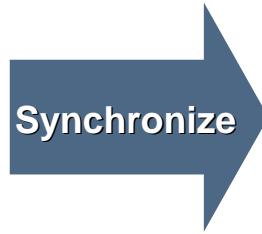


Now



**PIM R12C
Instance**

- Product Authoring

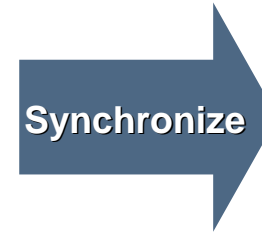


Synchronize



**R12 MDM
Instance**

- Product Repository
- Customer Information
- Pricing Information



Synchronize



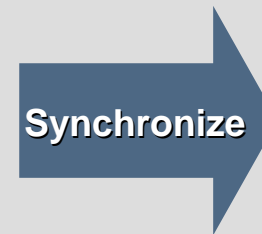
**Oracle
EBS Instance**

**LATER:
Required Upgrade
To R12.1**



**R12.1 MDM
Instance**

- Product Authoring
- Customer Information
- Pricing Information



Synchronize



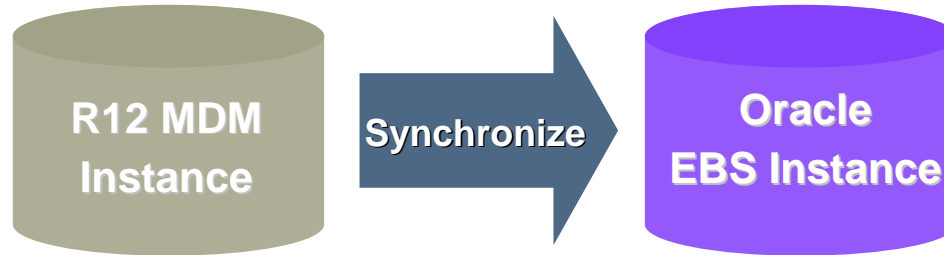
**Oracle
EBS Instance**

Option 2

R12, 2 Instances (Oracle Proposed)



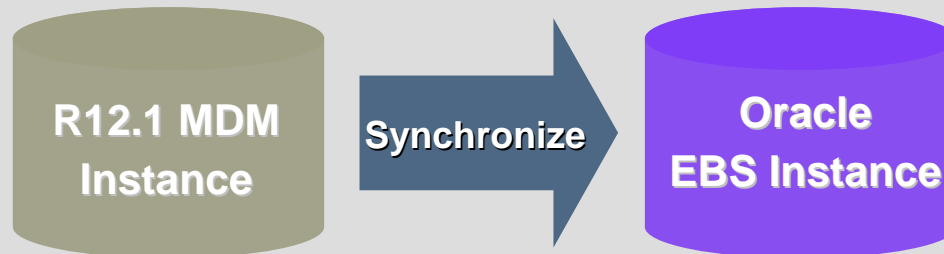
Now



- Product Authoring *
- Customer Information
- Pricing Information

** Includes customization to provide SKU generation capability*

**LATER:
Optional
Upgrade To
R12.1**



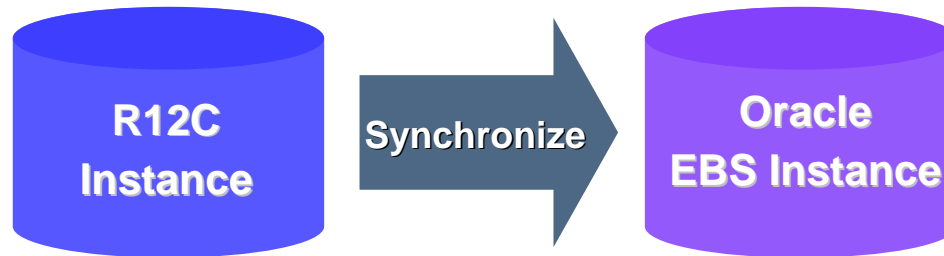
- Product Authoring
- Customer Information
- Pricing Information

Option 3

R12C, 2 Instances (Symantec Proposed)

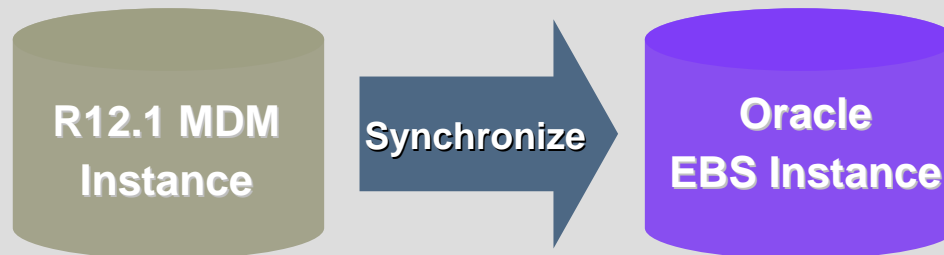


Now



- Product Authoring
- Pricing Information - SIMPLIFIED

**LATER:
Required
Upgrade To
R12.1**



- Product Authoring
- Customer Information
- Pricing Information