WINSHUTTLE®

Preparing for PIM

First Steps to Getting Ready for Your Product Information Management or Master Data Management Initiative

W EnterWorks

eBOOK

Introduction

When it comes to managing your company's product information, you have to possess the qualities of a maverick while maintaining the leadership and courage of a pioneer. Others in your organization might fail to recognize how critical good product data is to the success of the enterprise. But you know that one of your company's most valuable assets is being mishandled.

Perhaps most frustrating of all, you're aware that there are tools and techniques that can dramatically improve the way you manage and leverage that asset.

And so you set out to change the mindset of those who have yet to recognize the potential of product information for driving your business. This will require patience, education, and a relentless passion for developing the processes and acquiring the tools you need to manage your product information more effectively.

You begin by doing some research. Learning about different approaches to the problem. Asking friends and colleagues in your industry how they manage their product data, attributes, catalog copy, photos, data sheets, and other product-related content. Part of that research has led you to this eBook. And we're glad for that. We hope you will be, too.

About this Overview

We're EnterWorks. We offer solutions that address problems with acquiring, managing, and publishing product content; solutions like product information management (PIM), product master data management (MDM), and multi-channel publishing.

We wrote this eBook for business decision-makers like you who are responsible for gathering, managing, and publishing information about the products your company makes or sells. What we want to do in this paper is to give you some insights into initial steps you should take to prepare your department or your company for acquiring a solution for managing and publishing your product content.

While this message isn't aimed at IT personnel, it's okay if you're in IT. You can still get value from this overview by getting a sense of what it is your business clients are looking for.

It's critical to have a well-defined roadmap and implementation plan for your PIM or product MDM initiative, with clear goals and realistic timelines. We hope this paper will lay the groundwork for this important program.

Quantify or Qualify the Business Problems

Organizations often recognize problems with their product information only when they first appear as problems with key business processes:

» New products take too long to bring to market

» Catalogs take too long to produce and often have errors or obsolete content

» Finding products on your Web site is difficult as searches return too many products or the wrong products altogether

» Ensuring compliance with regulations on marketing and advertising is hampered by manual tasks

After a while you realize that the common denominator among these process problems is product information problems:

» Your product information isn't complete, current and correct

» It's scattered in a variety of systems around your organization

» Extracting it from legacy systems in order to publish or share it is a laborious task

» There are few (or no) standards for common data values (i.e., "each" may be "EACH", "EA", or "Each")

» Raw data from back-end systems ends up on customer-facing Web pages as inconsistent and random sequences of numbers and letters

» Keeping related data, information and images associated with one another is difficult

Having identified these problems, it will be easier to quantify or at least qualify them in order to build the business case for correcting them.

As David Loshin, president of Knowledge Integrity, puts it:

"The first step for any kind of master data management program is to clearly identify those business processes that are impeded by the absence of a unified view of the product landscape or that could be dramatically improved by providing that unified view."

But rather than taking on your entire organization's data problems at once, it's best to focus on just the problems affecting the processes you've identified. Loshin says this is a matter of "selecting the right business activities and then getting a better understanding of the data needs of those business activities."

In fact, most leading product MDM experts agree that you should think in terms of starting small and then expanding the scope of your initiative over time. Analyst firm Forrester Research encourages companies to first identify business processes that suffer from lack of reliable data, and then focus on solving problems with the data affecting those processes.

Forrester says "The alternative is attempting to boil the ocean and trying to solve Customer, Product, or Financial data for all processes and decisions across the whole organization — too big of an effort, destined to fail before it starts."

Identify Participants, Champions and Sponsors

An important point to remember is that yours isn't an IT-driven or IT-sponsored undertaking. You'll want to include IT personnel, but you and your business colleagues need to be the motive force. "The line of business needs to sponsor the project because it can identify the business value the data holds and how a single view of that data can affect the bottom line," says MDM consultant Dan Power.

At this stage, you only need to engage the people who are directly involved with the processes you're addressing. Baseline Consulting partner and co-founder Evan Levy suggests that "You don't need to talk to everyone in your company to be successful with MDM. Start with a small group who has a specific set of problems or challenges or needs."

It's likely you already know many of the people involved in managing and publishing your product information. You either work directly with them or interact with them at some point in the process. They may not even work for your company; they may be your suppliers or dealers.

These personnel may include:

» **Supplier personnel** who provide product data
» **Product and category managers** who edit and enrich product data
» **Marketing communications** (Web and print designers, copy, production)
» **Marketing vendors** such as ad agencies, digital agencies, and printers
» **Legal personnel** who review product information for compliance
» **Dealers or retailers** who re-use and leverage your product content
» And, of course, **IT personnel** responsible for product data and applications

Dan Power of Hub Solution Designs cautions "[not to] start before you receive executive sponsorship and funding for your data governance organization. If you begin without high-level support, you'll end up with a failed effort that must be explained later."

Among the participants in these business processes are key executives or personnel who are most affected by their inefficient performance. Approach those with the most "pain" and diplomatically recruit them as a sponsor or champion of your PIM initiative.

Evan Levy and his colleague Jill Dyché posit that the ideal profile of a project champion is someone with the authority and gravitas to clear obstacles, push for organizational change and to get hesitant or resistant players on board. While conceding that these champions are hard to find, they maintain that "the organizations that succeed with MDM are the ones that know those people and leverage them."
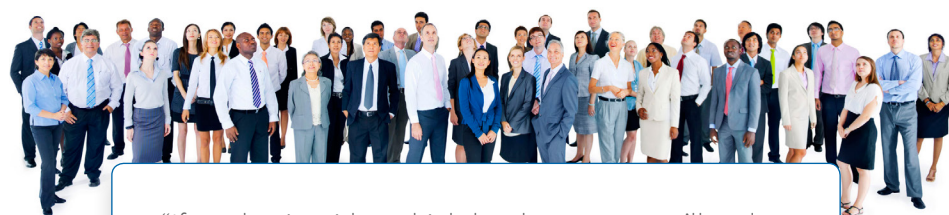
> "If you begin without high-level support, you'll end up with a failed effort that must be explained later."
>
> *— Dan Power, Hub Solution Designs*

Identify Locations and Sources of Product Data and Digital Assets

At this point, you need to start identifying the sources and locations of the product data as well as the attributes, descriptions, images, and other content associated with the data.

Begin by creating an inventory of where the product content originates, for what purpose it was originally created, where it's managed, which people and processes use it, and which media and channels consume it. Ideally the metadata for these assets are stored and managed in a registry or repository, which will help in identifying some of these aspects of the data.

Product data and related elements and assets may include:

» **Identification names and codes:** Manufacturer name, product name, GTIN and UPC codes, part and catalog numbers, etc.

» **Parametric product data:** basic facts such as dimensions, weights, operating temperatures, etc. These may come from an ERP or product lifecycle management (PLM) application.

» **Product attributes:** dynamic characteristics of a product (choice of colors, range of sizes) that can't be properly captured or managed in an ERP or PLM system, often managed in a series of spreadsheets or databases.

» **Marketing copy:** Long form, short form, and bulleted descriptions of products that are often composed and managed in desktop publishing systems. Some companies attempt to manage this in spreadsheets along with product attributes.

» **Digital assets:** Product images, video and audio clips, logos, indicia, PDFs of spec sheets, and other "unstructured data" that tends to be stored in network folders or individual desktops.

Create a spreadsheet or database that records the source, location, associations, and owners of these elements. *Note that you aren't actually moving or integrating data or creating a master data repository here.* All you're doing is creating an index that will help you account for their whereabouts later on.

A great variety of information makes up the total universe of content for each of your products. It may be in different systems, in different departments, and in different formats. Yet all must be brought under central control to ensure quality, accuracy, completeness, and timeliness of information used in every enterprise application.

Create a Data Quality Framework

You likely already know the current state of your data quality. You're the one who's closest to it, who has to extract it from a wide variety of sources and either fix it manually or live with it the way it is.

Having identified the product data and related content required for your process or application, you also need to determine what constitutes quality data according to your requirements. Authorities such as the American Health Information Management Association (AHIMA) and data quality experts Vikram Ramchandra and Sreedhar Srikant identify such key dimensions in data quality as:

» **Completeness** — All required records and all required values are available

» **Conformity** — Types, precision, formats, keys, codes, domain, ranges, etc., stored in required formats

» **Accuracy** — The data represent the reality

» **Consistency** — The value of the data should be reliable and the same across applications

» **Continuity** — Current and historical data is non-overlapping and unbroken

» **Timeliness** — Age of data meets user requirements

» **Uniqueness** — Technical uniqueness; every record can be uniquely identified

» **Redundancy** — Data is only stored once and every business object has a unique identifier

» **Duplication** — Each entity is represented by a single master record

Basic quality metrics such as completeness, accuracy, and consistency may be sufficient for Web content management or catalog publishing requirements. However, if product data needs to comply with strict regulations on advertising and marketing communications, such as in pharma and medical devices, additional considerations such as continuity, timeliness, redundancy, and uniqueness are also important. It's up to your organization to settle on the metrics that matter most to the processes you're addressing.

In any case, you need clean, standardized, rationalized, and normalized data as you start your PIM initiative. In fact, your PIM or product MDM platform should include data quality tools to support this work in advance of actually integrating data sources into the PIM repository. Without tools to cleanse, de-dupe, and standardize your data, you'll need to do this work as a separate step before implementing the PIM or product MDM platform.

You'll also need to ensure the data stays that way once it's in the repository. Again, having a suite of data quality tools as part of the PIM platform will help enforce data quality standards going forward.

You need clean, standardized, rationalized, and normalized data as you start your PIM initiative.

Perform a Data Quality Audit

The exercise of creating your data quality framework should highlight a number of areas where your data needs to be fixed. As Ramchandra and Srikant point out, these dimensions "generally harbor a multitude of sins we most commonly associate with poor-quality data: data-entry errors, misapplied business rules, duplicate records, and missing or incorrect data values."

Now, having identified these metrics, you need to pull a sample of your data for a data quality assessment in order to determine at which points your data fails to live up to the metrics in your data quality framework. The audit should leverage your existing business rules for data entry and management so that the results will be consistent with the desired quality after the PIM is deployed.

This exercise involves…

» **Determining the scope** of the audit such as data sources, fields and attributes to be checked, and other parameters;

» **Notifying data owners** of the audit and providing an overview of the process and explaining what will be expected of them;

» **Establishing the key indicators** required for each product, to include presence of metadata, completeness of attributes, the age of the data, and others;

» **Identifying potential risks** to data quality resulting from current data management systems and practices; and finally,

» **Collecting and auditing** a representative sample of data for consistency and completeness of the selected indicators.

The report produced by this audit, in combination with the data quality framework, will define terms for all involved in the project and help quantify the level of data quality work that needs to be done in advance of the actual PIM deployment.

According to business analytics consultant Sanjay Kumar, the audit should reveal the condition of:

» Basic data statistics and frequency analysis (patterns, unique count, occurrences, etc.)

» Missing and duplicate attributes of the master data (name and address analysis, etc.)

» Incorrect and out-of-range value analysis

» Data profiling and analysis as per predefined business and technical rules

» Cross comparison of data elements between source systems

» Data irregularity analysis (heterogeneous spelling, mixed case, etc.)

Establish a Data Governance Council

Much of the discussion around data governance focuses at the higher levels of an organization. Indeed, it's appropriate for an enterprise-wide master data management program to aim as high as possible in the organization to gain wide executive buy-in and ultimately to ensure data quality, completeness and consistency throughout the enterprise.

However, the creation of formal data governance councils with executive overseers and teams of data stewards may not be the best model to follow for your needs. Your organization may not even be ready for that scope of data governance. It may be best to simply "re-purpose" the existing team of process participants and sponsors into a data governance committee for data relating specifically to your PIM initiative.

Note that over time, this group may expand into a more formal data governance council, especially as your efforts intersect and overlap with those of other like-minded people in your organization. Dan Power offers good insights into the dynamics that occur at this point in an article in Information Management magazine, "How to Start a Data Governance Program."

There he outlines several of the key aspects involved in a data governance initiative, including:

» Organizational design, including the organizational model, leadership and staffing
» Executive sponsorship, corporate culture and organizational change management

» An internal communications strategy to support the data governance program.
» A data governance lifecycle, including the design and implementation of new data governance processes
» Build or incorporate a data quality function into the data governance program
» Implement the various types of supporting technologies required to enable a robust data governance program

"This should give you the sense for what is involved in starting a data governance program in a large corporation," Power concludes.

EnterWorks PIM/MDM

Why Choose EnterWorks?

» Revolutionary Agile Data Fabric™ Technology weaves together data domains

» Business-friendly platform for high user adoption, no coding required

» Hosted Private Cloud SaaS, Your Private Cloud, On-Premise, or Hybrid

» Perpetual, Term, and SaaS Licenses

» Lowest Total Cost of Ownership

» Highest Customer Satisfaction Scores (Gartner® and Forrester®)

» Fastest Go-Live Times in the Industry

Getting Started

We hope this has given you some ideas about getting started with your PIM or product MDM initiative. If you're considering a solution such as this, we hope you'll contact us. We'd enjoy learning more about your company, your product information challenges, and discussing whether our solutions would help solve your problems.

Some results our customers have achieved include:

» Faster time-to-market by reducing a months-long catalog cycle down to four weeks with increased accuracy and improved workflow

» Cutting six months and six figures from the production cycle of a 1,400-page catalog, with two percent increase in sales and four percent increase in gross margins over the first six months

» Storing, managing, and publishing product information 25 to 30 percent faster than pulling data from source documents

» Shortening production for a 2,200-page catalog by 70 percent, reducing resource requirements by half, cutting inaccuracies from 25% to less than five percent.

» Capturing $17 million in additional revenue with a real-time MDM-based pricing portal

» Realizing an 8-fold gain in productivity, including the ability to produce customized catalogs

» Managing 14 subsidiaries from one product MDM system to support mass customization across multiple brands

Where to Begin

As you evaluate your options, we invite you to talk to us about how EnterWorks can begin your PIM journey. A great first step is speaking with an expert who can answer your questions.

Email us at info@enterworks.com

MORE INFORMATION ➔

RECOMMENDED RESOURCES

From Case Studies to White Papers, the complementary resources below provide more information about the real-life impact of MDM and Data Governance:

Download the White Paper: *Multi-Domain MDM: Mastering Modern Data Management Challenges*

Download the Case Study: *Major Product Manufacturer Implements EnterWorks MDM for Business Agility and Efficiency*

Download the eBook: *Four Keys to Unlocking Data Quality with MDM*

For further resources, visit enterworks.com/resources.

The Winshuttle EnterWorks Difference

Winshuttle EnterWorks is the most powerful Multi-Domain MDM and Product Information Management (PIM) solution on the market today, providing the single view that enterprises need to acquire, manage, synchronize and syndicate all their data and product information.

Integrated, best-in-class tools—including Sales Portal, Publishing with Adobe® InDesign, Automated Workflow Engine, Syndication, and Digital Asset Management—have elevated Winshuttle EnterWorks as an analyst-ranked, customer-acclaimed solution. We've captured the attention of firms including Gartner® and Forrester®, who recognize our advanced functionality and report some of the highest customer satisfaction and loyalty scores in the industry.

Winshuttle EnterWorks is backed by a team of industry experts providing unparalleled support and innovation such as cloud deployment. As a market innovator, Winshuttle EnterWorks is also leading the way in emerging technology enablement for artificial intelligence (AI), augmented reality, machine learning, and more.

The Right Content. Enabled.

Deliver differentiated experiences across your content value chain with Winshuttle EnterWorks, your Product Information Management solution.

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