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Modernizing MDM: Unify and mobilize trusted data in real time

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The emergence of modern, operational MDM

Once hailed as the savior of data integrity, master data management (MDM) software—now in use for over 30 years—promised to deliver trusted data widely across the enterprise. However, many MDM projects ended up taking years to go live and resulted in complex, rigid, and expensive solutions that failed to deliver. Rather than delivering trusted core data for business operations as needed, critical data remained trapped in silos unless massive ongoing time and resources were spent. And in today's fast-paced world, this 30-year-old technology just can't keep up with the speed of your business and bring digital transformation to your daily operations.

Data unification and management as a core capability

The modern approach for enabling operational and analytical MDM is data unification and management, which includes not only multidomain, real-time MDM capabilities but also 360 views of any entity, consumable as data products. You can unify, manage, and mobilize trusted data in milliseconds, at scale, wherever and whenever it is needed. With the flexibility to rapidly respond to your business needs. With increased scalability—while delivering millisecond performance. By enabling you to tap into new AI and machine learning (ML) to unlock new levels of productivity and accuracy. By reducing operational and IT infrastructure costs with cloud economics and zero-disruption, zero-cost SaaS upgrades. By integrating your myriad applications and data sources in days or hours, not weeks.

The new generation of AI-powered MDM solutions has become a must-have investment for organizations that want a reliable, rapid path to digital transformation with a modern data foundation. You can realize significant cost savings and efficiency gains from moving to a modern MDM solution that is battle-tested, showing proven value. Fortunately, many industry leaders have already said goodbye to old technologies and have proven that modern MDM delivers.

The impact of modernizing your MDM

Benefits for Empire Life after moving from their legacy MDM to a modern MDM solution with Reltio's data unification and management capabilities:

- **Improved customer experience:** Their customer service representatives are more responsive with customer data at their fingertips. They improved first call resolution by 60% after implementation of our platform.

- **Increased data pipeline quality:** The organization reduced its suspect match pool by 60% after implementation and experienced 10-30% faster data retrieval via API calls compared to the previous SQL statements from their legacy provider.

- **Higher IT team productivity:** They minimized the time IT spent supporting customer service representatives and other business users, allowing the team to focus on more value-add activities.

- **Easier and broader access to trusted data:** With a friendly user interface, Reltio made their MDM easier and more available to business users.

Sample Achieved Benefits of Modernizing MDM

~$12M	~10X	£3.6M	60%	10x
5-year TCO savings	data steward productivity	annual MDM cost savings	higher first call resolution	faster sales access to data

For a deeper dive into the business impact of modern MDM, read the **Forrester Total Economic Impact™ study**.

New generation MDM innovations discussed in this paper allow you to meet current and future data unification and management needs and help you stay on track in your digital transformation journey. The good news: the migration process is not as risky, costly, or long as you might think—with multiple proven methods used in large enterprises enabling your modernization project to go live within 3-6 months.

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Where traditional MDM has fallen short

The limitations of traditional MDM systems come from their architecture. These monolithic systems were developed on J2EE-framework-based technologies and relational databases—each with known scalability issues. Hence they cannot support big-data transaction volumes, scale to billions of customer records with hundreds of attributes, or easily model large-scale entity relationships. The architectural limitations of legacy MDM systems also create latency in data, rendering them not useful for operational or real-time scenarios that need millisecond-level response. In addition, they were designed to operate in an on-premise environment. So, they are operationally expensive to run as compared to cloud-native, SaaS-based MDM systems.

Furthermore, if your business requirements change, extending a rigid data model or integrations with other systems requires hard-to-find, skilled resources and time. As a result, traditional MDM projects are often delayed significantly, affecting ROI and time to value. Because a rules-based entity resolution process depends heavily on manual reviews from data stewards, it rapidly becomes not scalable for complex, high-data volume environments. **Compare the Capabilities of Legacy MDM vs. Reltio Connected Data Platform** gives a head-to-head comparison of the two approaches.

So, traditional systems are often an impediment to driving successful digital transformation initiatives (Figure 1). Whether you use traditional MDM already or are considering adopting MDM for the first time, you should beware of MDM solutions that are simply lifted and shifted to the cloud. Even if they run as cloud-based solutions, their architectural limitations still apply and may impede your digital transformation plans.
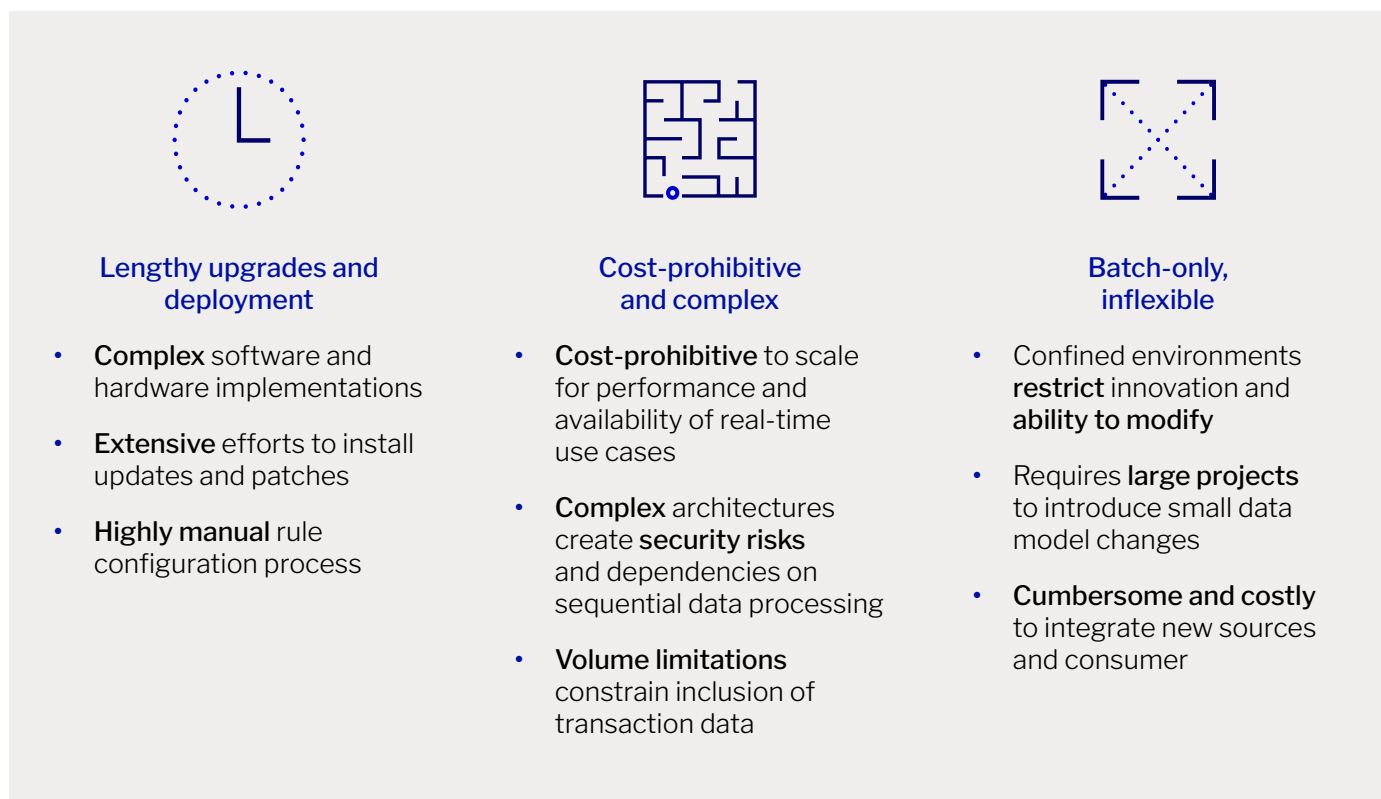
Lengthy upgrades and deployment

- **Complex** software and hardware implementations

- **Extensive** efforts to install updates and patches

- **Highly manual** rule configuration process

Cost-prohibitive and complex

- **Cost-prohibitive** to scale for performance and availability of real-time use cases

- **Complex** architectures create **security risks** and dependencies on sequential data processing

- **Volume limitations** constrain inclusion of transaction data

Batch-only, inflexible

- Confined environments **restrict** innovation and **ability to modify**

- Requires **large projects** to introduce small data model changes

- **Cumbersome and costly** to integrate new sources and consumer

Figure 1: Why traditional MDM can't keep up with your needs

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Key principles and capabilities of a modern MDM program

With legacy MDM systems not meeting the needs of today's businesses, a new generation of technology capabilities have emerged and gained significant traction with Fortune 2000 and mid-sized businesses alike. The new technologies are architected as cloud-native and SaaS-based to deliver significant infrastructure and operational cost savings. They are designed to be easy to integrate and extend, deliver fast time to value, horizontally scale to support a large volume of data, and enable real-time operational use cases. The following table (Figure 2) captures the key guiding principles of the next-generation MDM program and the required technical capabilities.

Principles	Example Requirements
Scalable and high performance	• Low-latency APIs to support real-time operational use cases • Cloud-native databases that seamlessly support large data volumes • Support for complex, large-scale relationships and hierarchies between entities
AI-driven productivity and cost efficiency	• Pretrained ML models for private LLM-powered entity resolution to enable multifold increase of data steward productivity • Cloud-native and SaaS-based MDM capabilities to reduce hardware and related management costs, with predictable license/subscription costs that can start small and grow with your business needs • Continuous, reliable product delivery and performance—automatic upgrades and peak loads without downtime or upgrade costs • Use of gen AI to transform data stewardship
Fast time to value	• Prebuilt, industry-specific data models, configurations, and integrations • Prebuilt integrations to common business applications, data catalogs, and cloud data warehouses • Proven implementation methodology with clear milestones to see value in 90 days or less
Agility, extensibility, interoperability, and ease of use	• Zero setup and easy to extend the canonical data model for new data sources and use cases • Provide a high degree of interoperability with various applications via an API-first, headless approach • Easy integration using no-code/low-code methods • Intuitive business user UI
Ability to support innovation and enable a real-time, digital enterprise	• Data abstraction layer to modernize your tech stack without rewriting or upgrading your legacy applications • Support for data fabric, data mesh, and other emerging architectures • Operational MDM use cases with millisecond latency

Figure 2: Guiding principles for modern MDM

- A large digital bank went live with Reltio in less than 4 months with full migration from the older IBM MDM system to their next generation customer master powered by Reltio.
- Empire Life, a top ten Canadian life insurer, migrated from their legacy MDM system to Reltio using Reltio's professional services.
- A large, high-tech company with 100+ million records migrated from a traditional MDM to Reltio in 6 months.
- A life sciences company with 1 million records migrated from a legacy MDM to Reltio in 8 weeks.

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Unify, manage, and mobilize your data with Reltio

Our Reltio Connected Data Platform was designed with the needs of a modern digital business and real-time operational use cases in mind. We provide you with unmatched business responsiveness via real-time data, a highly flexible architecture, and prebuilt components. Using our AI-powered data unification and management platform, which enables our key offerings—**Reltio Customer 360 Data Product**, **Reltio Multidomain MDM**, and **Reltio Entity Resolution**—you can unify and mobilize secure, high-quality data wherever and whenever needed. In milliseconds.

Born in the cloud, we operate with a SaaS, cloud-first mindset to offer rapid implementation, as well as continuous product delivery and automatic, frictionless upgrades. Our customer success operations are also tuned to fast response and deployment—in sharp contrast to the traditional/cloud-hosted model of monthly or quarterly service packs with a separate upgrade path for each customer.

Our platform architecture delivers data to your systems at the quality, scale, latency, performance, extensibility, high availability, and time to value demanded by today's digital business practices. In this section, we take a closer look at our **Reltio Connected Data Platform** (Figure 3) and its modern approach in three areas: core platform capabilities, cloud foundation, and velocity packs.
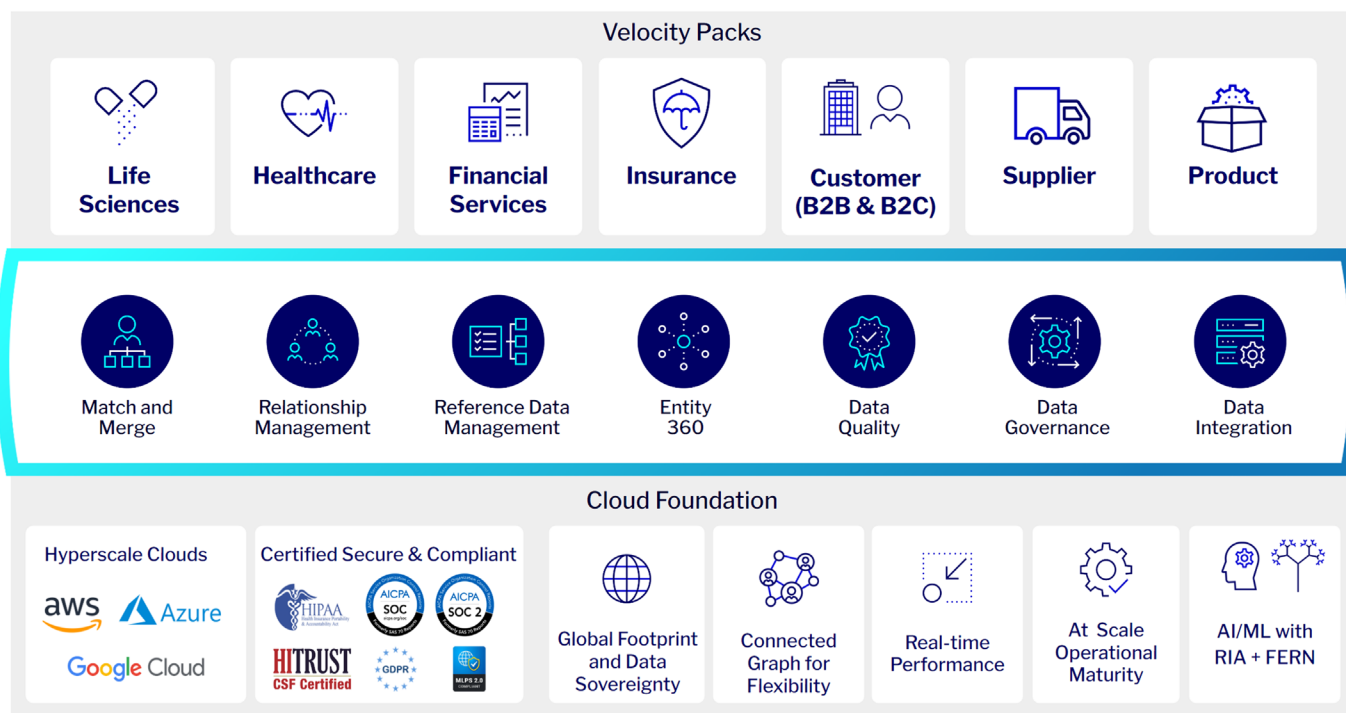

Figure 3: Reltio Connected Data Platform overview

1. Core platform capabilities

The **Reltio Connected Data Platform** unifies your multisource core business data into trusted, interoperable data. From initial data ingestion to ongoing curation of unified, insight-ready data to activate your real-time operational and analytical processes, our advanced capabilities simplify your data management and governance programs. These capabilities include **entity resolution** and matching, visualization and management of relationships, **reference data management**, the ability to create a 360-degree view for any entity, real-time **data quality management**, and **data integration**. Visit our **platform demo series page** for short demonstrations of key functionality.

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Our match and merge capability creates trusted, interoperable data through an array of **ML-powered and rule-based methods for data unification**. This includes our secure, patent-pending, LLM-powered Flexible Entity Resolution Networks (FERN) based on Flan-T5 XL LLM. These private LLM-based, pretrained models deliver high-quality, rule-free matching recommendations out of the box, without extra effort needed to train them. With our **automated householding capabilities**, data stewards can simply define match rules, and customers are automatically grouped into household relationships accordingly—no manual effort or custom IT projects required.

Our tiered offerings, powered by Reltio Connected Data Platform include:

Reltio Customer 360 Data Product: Accelerate data set development with trusted 360-degree views of customers and with interactions and derived attributes—as a data product you can manage and modify.

Reltio Multidomain MDM: Continuously unify, cleanse, and enrich your core data with AI-powered entity resolution, prebuilt and no-code integration, data quality, relationship management, governance, and reference data management.

Reltio Entity Resolution: Uniquely identify individuals using our private, secure, LLM-based FERN models for matching and create a universal ID that is maintained across the lifecycle

Our platform unifies and enriches multiple domains—such as customers, suppliers, locations, and products—with internal, and third-party data, creating a comprehensive and unique entity profile with a universal ID. It also manages and stores interactions, transactions, relationships, and derived attributes to provide a complete **customer 360 view**. Our platform also helps data stewards uphold data quality. With automated data quality management, the platform cleans, deduplicates, and standardizes data during initial intake and day-to-day use. Data quality insights are easily accessible through a prebuilt dashboard, making it easier for organizations to monitor, identify, and remedy data quality issues (Figure 4).

The Reltio Connected Data Platform offers a fine-grained user, role, and group framework, as well as workflows to enforce data access and **governance** policies, in support of master data governance. It also allows you to create, map, and manage **reference data** for broader data management.

One of the biggest challenges of MDM is managing the diversity and complexity of data sources, formats, and standards. To simplify **integration** of our platform with various systems in your organization, we offer prebuilt integrations and a low-code/no-code development environment with over 1,000 prebuilt connectors so you can connect your systems in hours, not weeks or months.

Schneider Electric

> " Reltio's platform has enabled us to provide data quality at the source in every connected system—in real time. It supports our business operations, improves customer experience, increases our efficiency, and drives revenue growth.
>
> **LOÏC TORDO, Product Director, Customer and Vendor Master Data, Schneider Electric** "
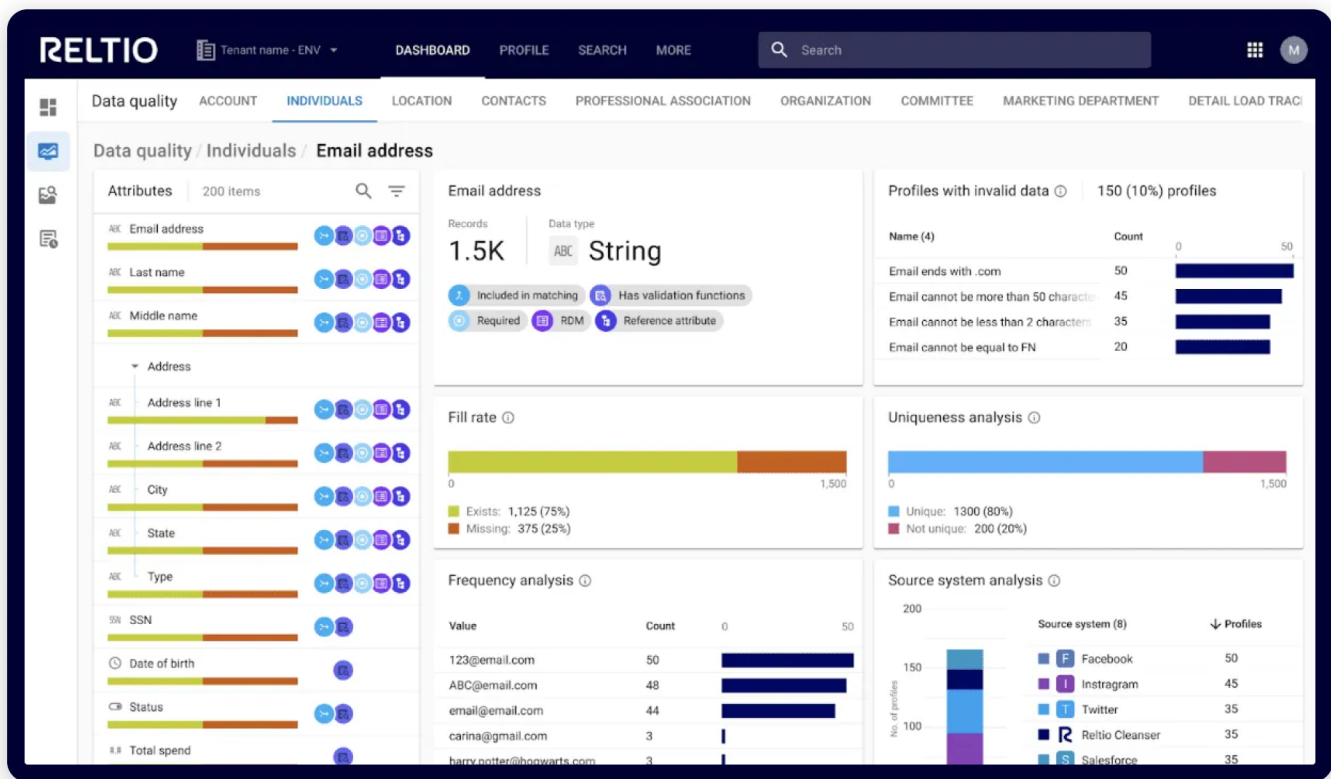
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Figure 4: Build transparency and trust with real-time visibility into data quality

2. Cloud foundation

The Reltio Connected Data Platform is the only solution on the market with over 10 years of experience delivering multidomain MDM via a cloud-native, multitenant, microservices-based architecture. Our platform is a high-performing, highly scalable platform with millisecond response time, and it has been battle-tested by leading enterprises globally. Available on all three major cloud platforms—**Amazon Web Services**, **Google Cloud Platform**, and **Microsoft Azure**—we enable intercloud portability so you can use your preferred cloud provider.

Our platform uses cloud-native primary databases such Google Cloud Spanner and Amazon DynamoDB, which are native to the hyperscalers; and they allow us to take advantage of the security, scalability, and performance of the respective cloud providers. So, unlike legacy or self-hosted solutions, you do not have to spend additional budget on upgrades, system operations, disaster recovery, or high availability.

We deliver enterprise-class security with granular, role-based access to records and attributes. We perform regular validation and penetration tests to ensure security and privacy compliance for your data. And our platform is certified by HITRUST and compliant with data privacy regulations including HIPAA, GDPR, and more so you know your data is protected. For more information on our security capabilities and certifications, read our **white paper**.

Our new Reltio Business Critical Edition service addresses the need for continuously available, trusted, real-time data serving mission-critical business operations, with category-leading 99.99% availability SLA and recovery point objectives of less than one hour.

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3. Velocity packs

Reltio Connected Data Platform enables you to accelerate your journey to trusted, interoperable data and show business value quickly with its prebuilt components called **velocity packs** (Figure 5). The **velocity packs** currently serve various market segments—life sciences, financial services, insurance, healthcare, cross-industry B2B (customer data) and B2C (consumer data)—plus supplier and product data. They include:

- Predefined, industry-specific data models for core data domains in the market segments and data domains listed above, as well as preset **configurations** such as rules for data matching, cleansing, survivorship, and more

- Prebuilt connectors and integrations to applications and third-party data enrichment sources as add-ons

- A prescriptive implementation approach and predefined implementation assets that emphasize delivering iterative value—early and in rapid succession—during the implementation
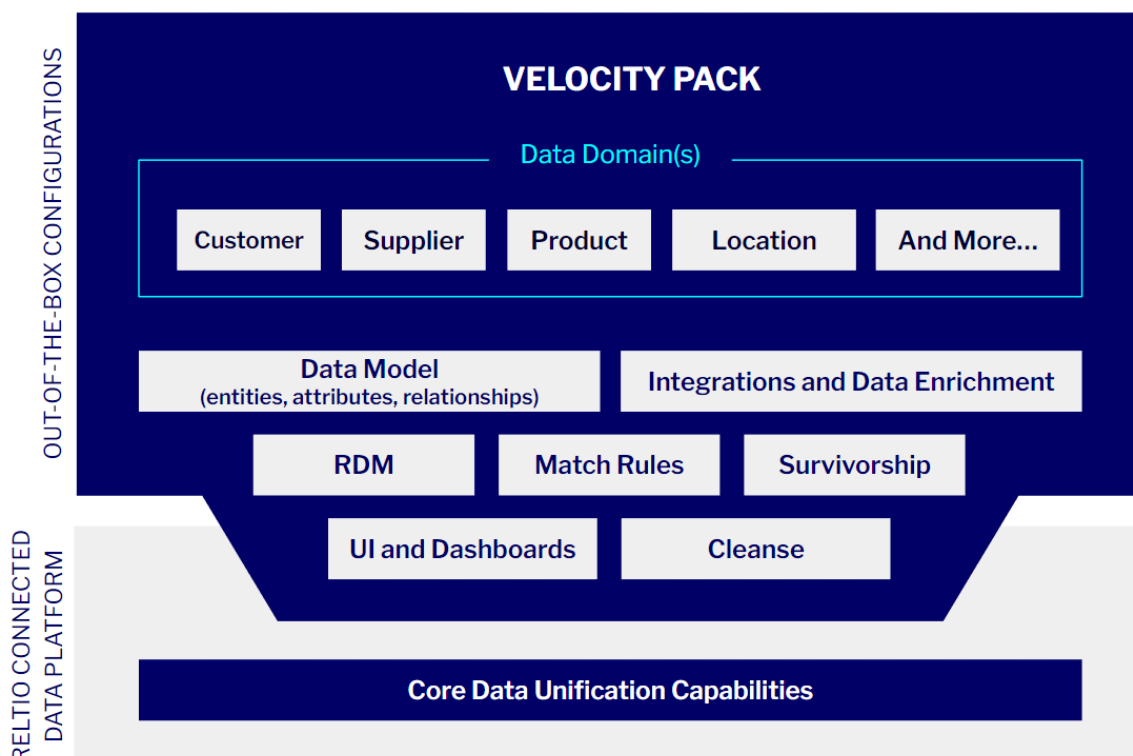

Figure 5: Velocity pack capabilities

IT benefits of data unification and management with Reltio

The Reltio Connected Data Platform offers a clear, proven path to cost savings and rapid time-to-value for IT teams, while enabling innovation and agility, and ensuring high security and risk management (Figure 6).

- **Reduces your infrastructure cost** by leveraging cloud and SaaS economics, built-in security, and HA/DR—and automatic, zero-disruption, zero-cost upgrades

- **Reduces your IT operational costs** by significantly reducing the effort for MDM upgrades and freeing system engineers, data stewards, and developers for more value-added work

- **Enables the connected, real-time digital enterprise** by developing a real-time, scalable, and clean data foundation to power customer experience initiatives, activate process efficiency programs, and simplify compliance and risk management

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- **Accelerates delivering insights from data** by fueling accurate, timely operational analytics with trusted data, expanding usage of AI/ML apps, and speeding integration to Snowflake, DataBricks, Google BigQuery, and more

- **Speeds up your digital transformation** and tech modernization initiatives with its ability to easily extend its data model, scale to billions of profiles, and integrate with your legacy systems without needing to rewrite them, by providing an abstraction layer above those data sources

- **Delivers world-class data and IT security capabilities** at dramatically lower costs by using its own data security capabilities, as well as those of public cloud security architectures

- **Simplifies UX via a chat-based interface** using genAI-powered Reltio Intelligent Assistant (RIA) to easily explore and segment customer profiles, create visualizations, and search digital assets

- **Simplifies compliance** with data privacy regulations and customer preferences with unified and accurate data, reduces compliance report corrections with higher data quality, and demonstrates the accuracy of compliance reports with data lineage capabilities

- **Sets up projects for success** and accelerates time to value with our adaptable, battle-tested, cloud-native SaaS MDM platform that can be deployed quickly without specialized skills

For more information on how trusted, interoperable data delivered via our real-time, flexible solution enables profitable business growth, **read the ebook**.

Examples of outcomes achieved by customers implementing our platform

- 14 weeks to live patient master at AstraZeneca

- Accurate customer status delivered millions of dollars in new opportunities — Schneider Electric

- 20% improvement in data quality scores —UK insurance company

- Accurate customer data with Reltio was key to predictive analytics for attrition at Fulton Financial

- "Due to Reltio, we are comfortable with our level of GDPR compliance." —Forrester TEI study, pharmaceutical customer

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Cost Saving and Time to Value	Accelerate time to value (TTV) from IT investments	Leverage cloud and SaaS economics for infrastructure cost savings	Reduce IT operational costs with SaaS and automation
Innovation and Agility	Enable connected, real-time digital enterprise	Gain more value and expand analytics with trusted real-time data	Increase agility and scalability with modern technology stack
Security and Risk Management	Ensure data and IT security	Simplify data privacy and compliance	Reduce IT project risk

Cloud-native SaaS MDM platform
API-first architecture, zero-cost HA/DR, security, zero-effort upgrades

Figure 6: IT benefits from Reltio

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Key architectural differentiators

Our modern platform includes multiple unique components and capabilities that make us stand out as a leader of modern MDM and data unification, along three dimensions:

- Foundational components that power agility, security, and compliance
- Standout capabilities that activate operational use cases with fast time to value
- Simplified user experiences that drive productivity and collaboration

Foundational components that power agility, security, and compliance

- **Multi-model data storage architecture:** Today's enterprises need their data management systems to access data across multiple systems and in different formats, provide millisecond latency, and be agile. They also want to model the relationships and hierarchies between entities, as well as model and manage their interactions and transactions.

  To address these requirements, we adopted a high-performance, multi-model data storage architecture, rather than selecting an easier approach of a single NoSQL, RDBMS, or graph database. With such an architecture, our customers can manage any type of entity and relationship, as well as interactions and reference data—all at a petabyte-scale with millisecond latency. Unlike many of our competitors, our platform is well positioned to deliver against today's demanding data and business requirements.

- **Connected Graph technology deployed on an API-first architecture:** Our platform leverages graph technology to identify and reveal relationships among the people, products, places, and activities you care about. It helps build contextual multilevel hierarchies with roll-ups, allowing you to unlock the value of relationships, such as in households and organizations. All the data and operations on a graph are also exposed as APIs.

> Our platform processes about **56 billion** API calls annually, and currently manages about **8 billion** consolidated profiles and more than **100 billion** relationships.

- **Canonical data model:** At the heart of the Reltio Connected Data Platform is a fluid and flexible data structure, which is a superset of the data models within your various systems. This enables all your systems to be able to use the unified data. However, you need not plan for every attribute from every system in advance. You can start small, and as new systems are brought in, you can identify their mappings to the canonical data model—and if needed, easily extend the model.

- **Secure and auditable by design:** Our platform comes with fine-grained access control and integration with enterprise SSO providers. It also inherits the security capabilities of its cloud providers. The platform provides audit and lineage at user and process level—all access as well as changes to data are auditable.

- **Cloud-native and SaaS:** The cloud-native architecture of the Reltio Connected Data Platform allows it to automatically scale up and down based on seasonal volume changes, without downtime or dependence on IT. The platform runs on major public cloud solutions, giving you the choice, while delivering cloud economics. Its SaaS architecture enables disruption-free upgrades with zero costs.

> " The ability to scale and bring on new data sources quickly has made us much nimbler with our master data.
>
> **Director of enterprise data services, insurance provider**

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Standout capabilities that activate operational MDM and data unification use cases

- **Designed for real-time operations with continuous data flow and curation:** Due to its above-mentioned architecture, the Reltio Connected Data Platform completes entity resolution and other processes in milliseconds even for high data volumes. Data quality validation, cleansing, and standardization are performed continuously as data is ingested and updated. Using the real-time APIs and integration connectors, our platform can seamlessly plug into operational business processes that are reliant on millisecond latency responses, such as for customer-facing systems.

> **VENTANA RESEARCH**
>
> "Organizations looking for a modern MDM platform with real-time data management capabilities for data operations should consider Reltio because it enables organizations to unify data while maintaining quality and reliability. With Reltio, users can connect data across a wide range of applications and data stores in real time to accelerate decision-making and digital transformation.
>
> **VENTANA RESEARCH**
> April 2023

- **LLM-based, rule-free match with FERN:** Our platform draws on the power of machine learning to implement smart matching and merging of data from multiple sources. We further extended this capability with industry-specific, pretrained ML models that provide high-quality matching recommendations out of the box, without extra effort needed to train models. This can significantly accelerate your time to value and increase data steward productivity. This is in sharp contrast to most other MDM systems that only offer rules-based matching—not scalable—or generic ML matching models that require fine tuning and can delay your go-live.

- **360 profiles with interactions and segmentation:** The Reltio Connected Data Platform's architecture enables you to model and store transactions and interactions within the same **repository**. This allows you to build a true customer 360 profile and learn more about your customer's behavior, preferences, and intent. You can further use these profiles to create granular, dynamically updated segments and activate them using prebuilt connectors to popular sales, service, and marketing applications. Fulton Bank, for example, needed to think beyond traditional master data management to understand customers' transactions and interactions—so they chose our platform. Now they can leverage customer intelligence across the organization to deliver a unified and streamlined customer experience.
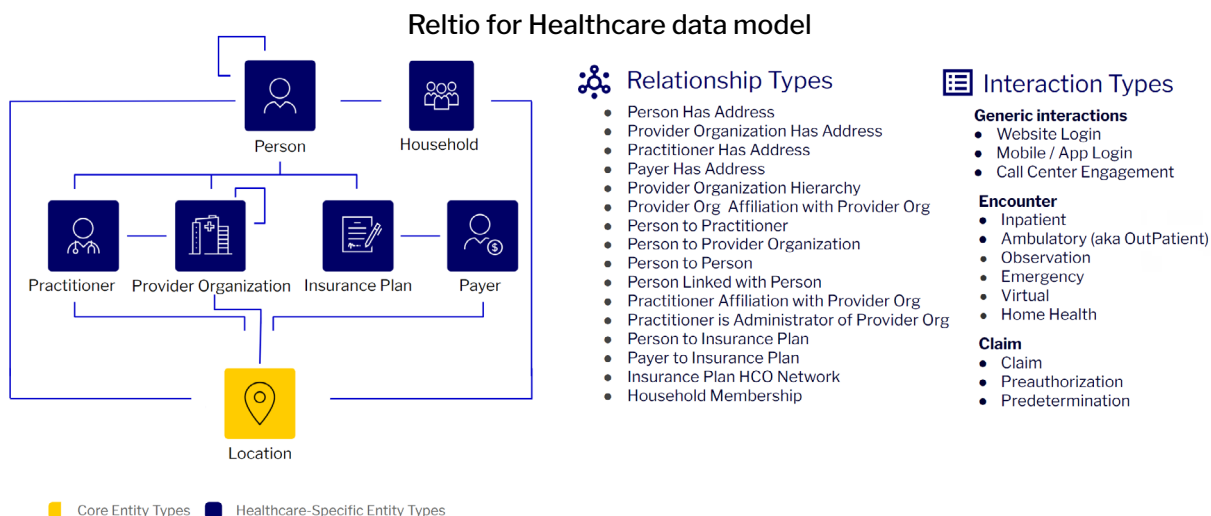
Reltio for Healthcare data model

Relationship Types
- Person Has Address
- Provider Organization Has Address
- Practitioner Has Address
- Payer Has Address
- Provider Organization Hierarchy
- Provider Org Affiliation with Provider Org
- Person to Practitioner
- Person to Provider Organization
- Person to Person
- Person Linked with Person
- Practitioner Affiliation with Provider Org
- Practitioner is Administrator of Provider Org
- Person to Insurance Plan
- Payer to Insurance Plan
- Insurance Plan HCO Network
- Household Membership

Interaction Types

Generic interactions
- Website Login
- Mobile / App Login
- Call Center Engagement

Encounter
- Inpatient
- Ambulatory (aka OutPatient)
- Observation
- Emergency
- Virtual
- Home Health

Claim
- Claim
- Preauthorization
- Predetermination

Core Entity Types   Healthcare-Specific Entity Types

Figure 7: Reltio for Healthcare velocity pack data model showing entities, relationships, and interactions

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Each velocity pack's data model also includes industry-specific reference data to standardize the lookup values across different systems and simplify data governance (Figure 8).

Reltio for Healthcare: Sample reference data

Reference Data

- Person Type
- Address Type
- Email Type
- Phone Type
- Speciality
- Taxonomy
- Identifier Type
- Status
- Policy Consent Type
- Multi Channel Type
- Channel Consent
- Professional Activity
- Professional Designation
- Provider Role

- Professional Degree
- Practice Type
- License Type
- Practitioner Role
- Facility Type
- Ins. Plan Type
- Ins. Plan Benefits Type
- Network Type
- Multiple Birth Indicator
- HC Consent Policy Rule
- HC Consent Policy Scope
- HC Consent Policy Category
- HC Consent Policy Decision

- HC Consent Provision Purpose
- ICD10_CM (Diagnosis Code)
- Education
- Ethnicity
- Race
- Language
- Occupation
- Dwelling Type
- Household Income
- Household Net Worth
- Household Credit Rating
- Homeownership code
- Insurance Coverage Type

Figure 8: Reltio for Healthcare velocity pack data model showing sample reference data

- **Faster time to value:** Reltio's cloud-native environment is available from day one of your implementation—there is no wait time for you to get started. And our velocity packs are designed to accelerate deployment and begin to show business value quickly—in less than 90 days (Figure 9).
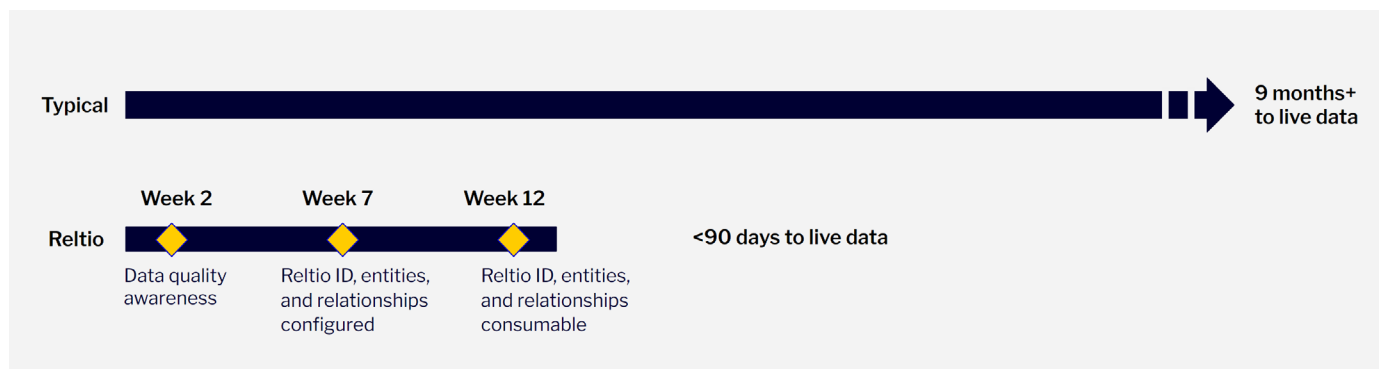

Typical — 9 months+ to live data

Reltio — <90 days to live data

Week 2 — Data quality awareness
Week 7 — Reltio ID, entities, and relationships configured
Week 12 — Reltio ID, entities, and relationships consumable

Figure 9: Reltio velocity packs with prescriptive delivery methodology enable value in weeks

- **Extensible:** The Reltio Connected Data Platform provides unmatched extensibility, allowing you to meet your specific needs. Unlike today's MDM systems, as your project scope increases, you can easily extend our platform's data model to include other domains and businesses. It also allows you to build and deploy Java-based custom logic such as proprietary cleansing algorithms or custom validation logic for entities and relationships—and to extend the platform in infinite ways.

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- **Event-driven integration with built-in no-code/low-code environment:** Reltio's API-first architecture is layered with an intuitive drag-and-drop, graphical interface that helps you rapidly create any integration. With 1,000+ prebuilt community recipes for common use cases, you can set up real-time integration workflows in a matter of hours. Prebuilt integrations to major applications and data sources are available to streamline data orchestration (Figure 10). More information on our integration capabilities is available **here**.

sanofi

Sanofi saved over **half a million dollars and 9 months** due to the ease in adding a new data source, as compared to its legacy solution.

ADVARRA

" The Reltio Integration Hub was integral in helping us connect accurate and trusted data 3X faster than alternative solutions while still enriching data and lowering costs by approximately $100,000!
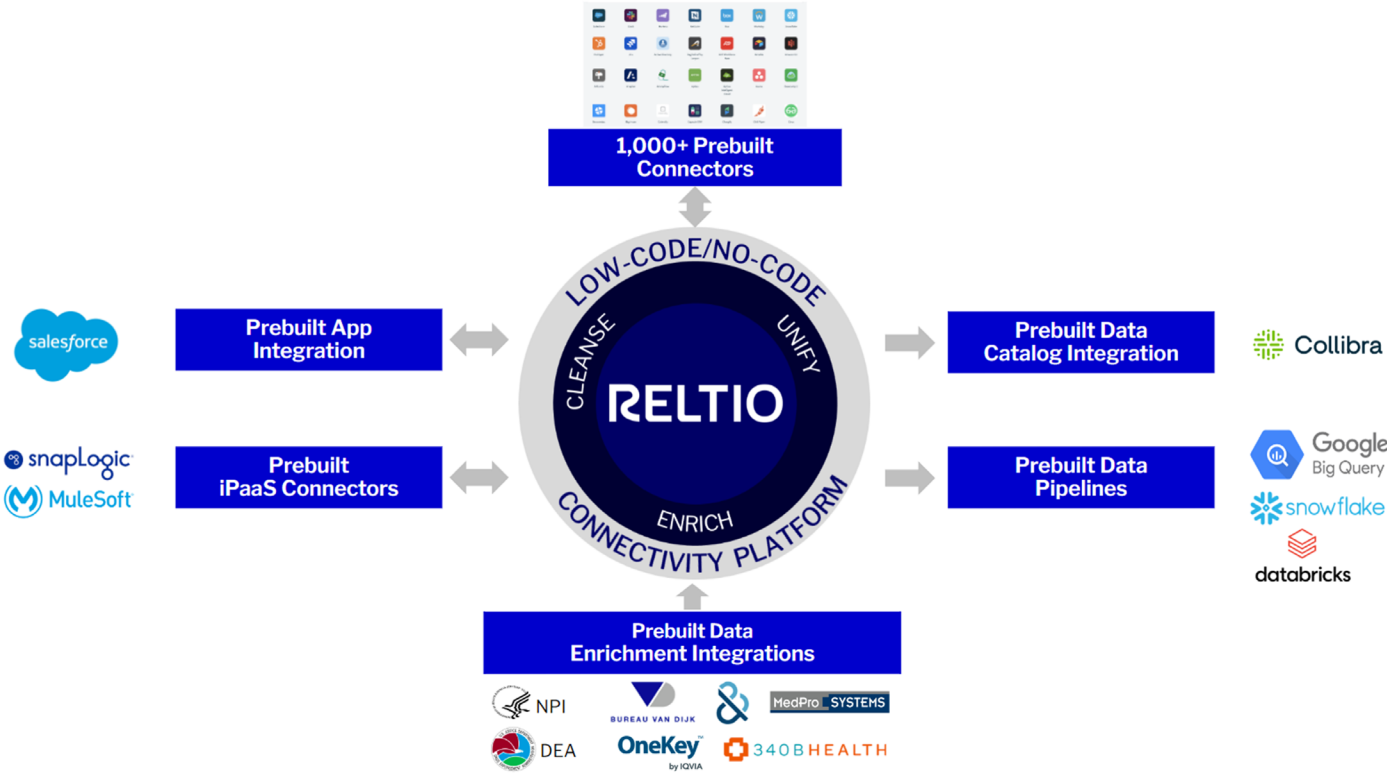
ADVARRA "

Figure 10: Extensive capabilities for integration

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Intuitive user experience drives productivity and simplifies governance

- **Centralized configuration:** The Reltio Connected Data Platform provides you with a centralized environment to configure and manage your system. You can configure parameters for any:

• Entity	• Match rule	• User interface
• Attribute	• Custom logic	• Data load
• Relationship	• Reference data	
• Location	• Streaming	

Having configuration settings in one place and wizard-driven makes it easier for your administrators to manage the environment—and it reduces a new admin's learning curve (Figure 11).
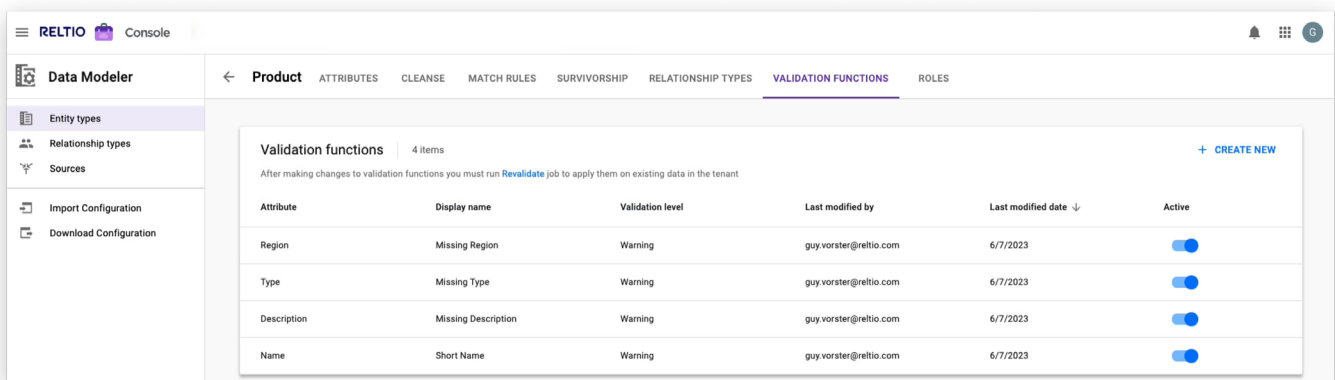

Figure 11. Configuring validation functions in the data modeler

- **Built-in data quality and observability for fast insights:** The Reltio Connected Data Platform **continuously improves** data consistency, accuracy, and manageability. It uncovers patterns, detects anomalies, and assists data stewards to make their jobs more focused and efficient. The three-step sequence of cleanse, match, and merge all occur in real-time, enabling continuous data validation. In addition, our platform provides real-time data quality dashboards that highlight data issues for quick resolution and provide you with operational insights and trends. As a result, you are better prepared to assess the effectiveness of your data quality program than those using most other MDM systems.

> **FORRESTER®**
>
> **"** Reltio's real-time, AI-driven MDM delivers exceptional data quality and customer 360.
>
> **The Forrester Wave™ Master Data Management, Q2 2023 report** **"**

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- **GenAI-powered data exploration and search:** Our recent innovation, Reltio Intelligent Assistant (RIA), transforms data stewardship with a conversational assistant to explore customer profiles and easily search digital assets. Powered by Elasticsearch, our platform indexes all the data that flows into the system in real time. As a result, every entity and attribute you are managing can be searched in a lightning-fast manner.

- **Dynamic segmentation and real-time activation:** RIA also enables you to create granular, dynamically updated segments. You can then activate your customer data segments anywhere with 1,000+ prebuilt connectors to popular sales, service, and marketing applications. We also provide a dedicated intuitive UI for creating, managing, and activating customer segments. Most legacy MDM systems don't offer segmenting.

- **Consumer-grade UX to manage data:** The Reltio Connected Data Platform offers a highly configurable, consumer-grade user interface to its users—business users, data stewards, and admins—to enable them to manage the data, analyze its quality and lineage, and collaborate to identify and address issues (Figure 12). This capability enables quick adoption of the solution while increasing user productivity. By contrast, most solutions offer an IT-focused user experience, where business users depend on IT to diagnose data issues, causing delays in operations and decision-making.
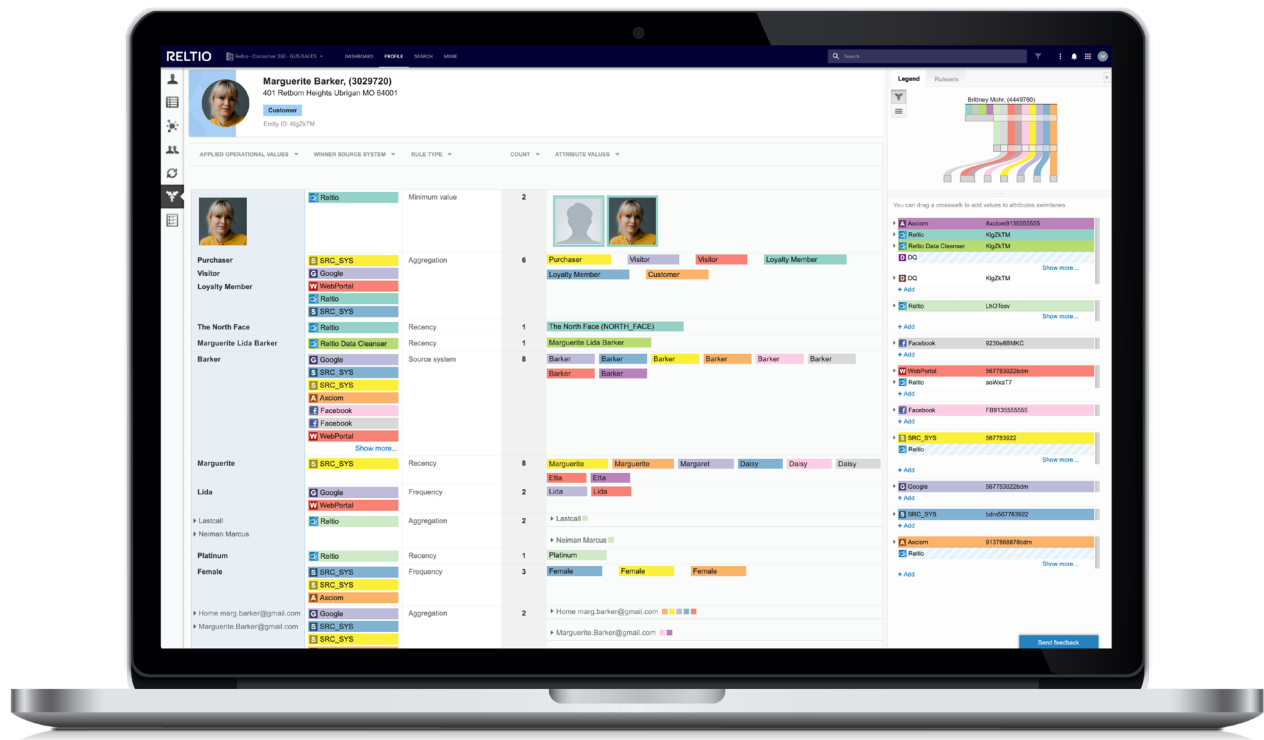

Figure 12: Consumer-grade UX

- **Governance and workflow:** Our platform allows you to collaborate and resolve issues across teams with built-in workflows. Data stewards and business users can collaborate and manage tasks using various routing rules. In addition, our API-first approach allows you to implement reviews of the data within other systems by invoking the appropriate API. By comparison, most traditional MDM solutions offer a cumbersome business user experience for managing tasks, limit reviews of the data to the MDM system alone, and offer limited collaboration with business users. We also make our trusted core data and 360 customer profiles readily discoverable across your enterprise through prebuilt integration with data catalog systems such as Collibra, which streamlines data governance.

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Migration from legacy MDM to Reltio

Over a hundred companies have successfully migrated from their prior traditional MDM systems to Reltio Connected Data Platform. Some have used accelerators developed by our network of partners; others have used the proven migration methodology developed by our professional services team. With either approach, migration from legacy MDM to our platform can be predictable in both cost and timeline. For example:

- A large digital bank went live with Reltio in less than 4 months. This included full migration from the older IBM MDM system to their next generation customer master powered by Reltio—their customer system of record, integrated with deposits, investment, and mortgage businesses.
- Empire Life, a top ten Canadian life insurer, migrated from their legacy MDM system to Reltio using Reltio's professional services.
- A large, high-tech company with 100+ million records migrated from a traditional MDM to Reltio in 6 months.
- A life sciences company with 1 million records migrated from a legacy MDM to Reltio in 8 weeks.

A typical migration project incorporates four phases:

- **Discovery:** In this phase you review the legacy system, define any new requirements, and create a fit-gap analysis and implementation plan.
- **Configuration data migration:** In this phase, you migrate the MDM tables and attributes, relationship tables, match rules, survivorship rules, users, and roles. If you use a partner mapping tool for this phase, it will map the legacy MDM configuration to the Reltio model. This is stored in a JSON document, along with other supporting configurations such as match rules, cleanse rules, survivorship, and more.
- **Data migration:** This phase involves extracting the data from the legacy MDM system, mapping it to Reltio tables, and then loading them into Reltio.
- **Data reconciliation:** Here you perform the reconciliation and address any issues you find. These include ensuring record counts match between the two environments, data types are preserved or converted, the lists of values are loaded or mapped correctly, and fields are mapped correctly between the source and target.

Discover and Plan	Configure Data Migration	Migrate Data	Reconcile Data

By following these steps, whether using an automated migration tool or a proven methodology, you can reduce the migration cost and timeline by 40 to 60%.

RELTIO

Moving beyond traditional MDM with Reltio

Your success with digital transformation initiatives requires trusted data. But your MDM system, which is the source of your trusted data, needs to be cost efficient, scalable, agile, secure, and extensible. You need it to quickly integrate with new data sources and handle massive data volumes in real time. And you want your MDM system to help accelerate your efforts towards modernizing your technology stack, moving more of your workload to the cloud, while delivering value rapidly. **Legacy MDMs** score poorly in these requirements.

Modern MDM practices built with **Reltio Connected Data Platform** are architected to address these issues and have become a must-have investment for today's digital enterprises. And with partner network migration tools and deployment methodologies, migration from traditional MDM to our platform has proven to be predictable—both in terms of cost and timeline. Over a hundred companies have replaced their traditional MDM systems with our cloud-native, SaaS-based platform to fuel their business operations and analytics solutions with trusted data.

ABOUT RELTIO

At Reltio, we believe data should fuel business success. Our AI-powered data unification and management offerings—Reltio 360 Data Products, Multidomain Master Data Management (MDM), and Entity Resolution—transform siloed data from disparate sources into unified, trusted, and interoperable data. Powered by the Reltio Connected Data Platform, these offerings unify and deliver interoperable data where and when it's needed, empowering data and analytics leaders with unparalleled business responsiveness. Many leading enterprise brands—across multiple industries around the globe—rely on our award-winning data unification and cloud-native MDM capabilities to improve efficiency, manage risk, and drive growth.

To learn more, visit www.reltio.com

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