

### The Rise of Automated MDM:

How AI and Machine Learning are Revolutionizing Master Data Management

Presented by: William McKnight

"#1 Global Influencer in Big Data" Thinkers360
President, McKnight Consulting Group
3 X Inc 5000

 I'VE BEEN FEATURED

 IN THE 2024

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 THE MOST INFLUENTIAL PEOPLE IN DATA

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## CLAIRE – AI for MDM Applications

April 2025

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## The Data Management Choice for the Enterprise

• 'Born in the cloud' for the modern data architecture

- 3<sup>rd</sup> party validated leadership in every category
- Al-enabled products in production today

Best Data **Only Data** Management Management Products Platform Multi-Vendor, Multi-Cloud & Hybrid

- Only true platform for data management
- Only AI-powered data management platform built on metadata system of record
- IPU consumption pricing model

• Broadest set of connectors, accelerators and multi-cloud integration tools

• "Switzerland of data"



 Manage data across any cloud platforms, on-premises, and hybrid environments

### Intelligent MDM & 360 Applications



### CLAIRE®: Al-powered Data Management



#### IN-PRODUCT AI-POWERED METADATA INTELLIGENCE AND AUTOMATION



#### NATURAL LANGUAGE INTERFACE TO DATA MANAGEMENT

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### DATA MANAGEMENT AUTOMATION







## Thank You







### The Rise of Automated MDM – How AI and Machine Learning Are Revolutionizing Master Data Management

Mike Frasca VP of Product Management

### Al-powered automation for MDM and data unification



#### Trusted, unified data

#### Real-time, always on

Secure, scalable, and flexible

LLM-powered matching Gen-AI powered UX

**RELTIO** 

### Common entity resolution challenges







**Specialized skills** needed to set up match rules and monitor them



Manually setting up match rules and executing merges is **error prone** 



Processing tens of thousands of match pairs is **time consuming and expensive** 



**Inconsistent and incomplete data** adds to complexity and results in missed matches

### FERN: Flexible Entity Resolution Networks

Secure large language models (LLMs) to increase matching productivity and accuracy at scale

- **Zero-shot learning** means no training or rule creation required for FERN—works right out of the box
- New types of matches that rule-based approaches cannot find—FERN semantically understands data
- **Data security and privacy** compliance—Reltio-hosted LLM so customer data never leaves the tenant
- **Granular match control** with relevance scoring and customizable automerging thresholds
- **Global impact** with natural language processing of 60 human languages (English, Spanish, Chinese, etc.)



### Previously impossible with rules alone, now possible



FERN creates a composite score and finds the match even when another profile has a **different first name**, **middle name**, and last name

### Automating entity resolution at scale—with high accuracy



Zero-shot learning means immediate results, speeding time to value



**No Specialized skills** needed to enable, train or monitor model performance



**Consistent, standardized** approach to matching and merging data



Immediately processes all data and predicts match pairs driving **data steward efficiency** 



**Finds matches** rules are unable to with semantic understanding

### GenAl-based conversational UI

Increase data steward productivity by enabling a chat-based interface to access, manage, explore, and segment trusted data and information\*

Speed up time to value and training with 24/7 self-service answers to natural language queries

 Amplify data steward impact by eliminating hours of searching docs & logging service tickets

Perform more dynamic and richer analysis of your data by empowering users to quickly obtain broader and deeper insights about your data\*

#### Ask RIA ...

"Find individuals born in May whose name is [John]"

"Create a pie chart of customers in the US by industry and add to my dashboard"

"How do I load data into Reltio?"

... and instantly receive detailed answers



**RELTIO** 

### Learn More at Reltio.com



### Thank you!



### **Partial Client List**

CONSUMER PRODUCTS/RETAIL	FINANCIAL	INSURANCE/HEALTHCARE
<image/>	SCHOOLSFIRST   FEDERAL CREDIT UNION   COERAL CREDIT UNION   CREDIT ACCEPTANCE   COERAL CREDIT ACCEPTANCE   STANDARD BPOOR'S   STATE STREET   Lichungen   STATE STREET   Lichungen   STATE STREET   Lichungen   State Street   Lichungen   State Street	<image/> <image/> <image/> <image/> <image/> <image/> <image/>
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EDUCATION	PHARMACEUTICAL	TELECOMMUNICATIONS
NATIONAL HERITAGE ACADEMIES CAL POLY	AmerisourceBergen Specialty Group	See Telia ener verizon





### Big/Analytic/Vector/Mixed Data Management



### **Data Movement and APIs**



## **Operational/Transactional Data Management**



### Dataversity Analytics Architecture with William McKnight 2025

- 1. 2025 trends in Analytic Architecture
- 2. Standardizing Data Collaboration: The Role of Open Table Formats in Data Architecture
- 3. From Models to Data: How Gen AI is Changing the Game for Data Scientists and Data Teams
- 4. The Rise of Automated MDM: How AI and Machine Learning are Revolutionizing Master Data Management
- 5. The Data Observability Advantage: Unlocking the Secrets to Reliable, High-Quality Big Data
- 6. Promising AI Use Cases for the Enterprise in 2025
- 7. Edge Computing Evolved: Introducing the Zero-DBA, Zero-ETL Embedded Database
- 8. The ROI of AI is (usually) there Let's Run the Numbers
- 9. Translytical Databases: A Framework for Evaluation and Use Case Analysis
- 10. From Pre-Trained to Fine-Tuned: How to Get the Most Out of Vector, RAG, and Small Language Models
- 11. Designing a Data Platform for the Future: Principles, Patterns, and Best Practices for Data Fabrics and Data Meshes
- 12. AlOps: Applying DevOps to Competitive Advantage

## Master Data Management

## **MDM Reference Architecture**



## Master Data Management Program Justifications (TCO)

- Analysis of the impact on multiple projects
- A single approach to achieving desired outcomes
- Demonstrated proficiency in the use of relevant tools and technologies
- Consolidation of expense streams to maximize efficiency
- Full curation of key enterprise subject areas which allows for maximum data utilization

### Sample Applications Improved with MDM

Industry	Subject Areas	Applications	Objectives with MDM	ROI
Retail	Customers, locations, Menu items, ingredients, store locations	Improve customer list management and make real- time AI-based recommendations, Speed up new menu item introduction and ensure consistency across stores	Improve <b>average order size</b> , Foundation for loyalty program, CCPA compliance, enable online ordering, <b>Fraud</b> detection, <b>real-time recommendations</b>	More Sales (ROI)
Healthcare	Patients, providers, locations, supplies, donors, reference data	Enable best clinical practices	Enable data sharing for research and operational <b>efficiency</b>	Reduced Costs (TCO)
Manufacturing	Ingredients and recipes, Financial hierarchies	Manage multiple large rollup hierarchies, Manage ingredients and variations to control the manufacturing process	Understand margin and pricing across regions; enable and expand ecommerce, Improve business processes and service while eliminating clerical errors (order fulfilment, billing, etc.), Enable nimbler FP&A (what-if scenarios, tax optimization, etc.), supply chain management	Build one, use many (TCO)
Financial	Customer, product, channel	Customer management, risk management, audit support, regulatory compliance	Anti money laundering	Reduced AML (TCO)

## **Master Data: Not an Option**

## You'll need master data but without a discrete focus on it, you will not do it well

**Project Focus** 

Focus is on an Application's Master Data Needs First

Usually a smaller work effort to get to 2<sup>nd</sup>, 3<sup>rd</sup>, etc. applications Build to Scale!

Enterprise/Program Focus

Focus is on a Subject Area First

Higher Chance of Creating New Organizational Possibilities!

Danger: Build it and They Will Come

Either Initial Focus Needs a Secondary Focus on the Other

It's the MDM Leadership Challenge!



### Robust MDM is half of the effort for Success

- Fraud Detection
- Call Center Chatbot
- Self-Driving/Transportation
- Predict Flight Delays
- Marketing segmentation analysis, campaign effectiveness
- Smart Cities
- Retail, Manufacturing Supply flow, Customer flow
- Oil and Gas Exploration
- Etc.

### **Enterprise Subject Areas**

- Customer Agencies
- Employee • Branches
- Facilities • Partner
- Patient • Franchises
- Supplier
- Product
- Bill of Materials
- Assets
- Equipment
- Media
- Geography
- Citizen

- Stores
- Account
- Certifications
- Contracts
- Financials
- Policies
- Weather



## **Example: Fraud Detection**

Most Fraud Detection is transaction heavy Sync MDM to Edge Customer Attributes to include Last n "transactions" Avg/hi/low txn profiles **Customer State** Customer Financial profile



• Citizen

## **Either Way**

## You'll need master data but without a discrete focus on it, you will not do it well

Do it with data specialists

Data modeling, integration, quality

Use a Tool

It's Operational and Real-Time

Let the Hub <u>create</u> analytical/empowering elements

Make it a discrete project

With high touchpoints with applications

Focus on Total Cost of Ownership first for Justification Build to Scale

It doesn't take much longer to consider all known requirements



## The Real Decision Points

### Roadmapping Around:

- Sponsorship
- Subject Areas
- Publishers or Workflow
  - Don't Forget Third-Party Data
- Subscribers
  - Applications
  - Don't Forget "Common" Artifacts like Data Warehouse, Data Lake, and Operational Hubs
- Communications
- Data Governance/Stewardship



### **Cost of Master Data**



Total \$1,350,000

### **Bespoke Master Data**

Improve customer list management \$500,000 Real-time AI-based recommendations \$500,000 New menu item introduction \$100,000 Ensure consistency across stores \$250,000

### Master Data Management \$550,000

Integration with...

- Improve customer list management \$25,000
- Real-time Al-based recommendations \$25,000
- New menu item introduction \$10,000
- Ensure consistency across stores \$5,000 Total \$715,000

### "Bespoke MDM" Skips

- Data Integration
- Data Modeling
- Data Quality
- 3<sup>rd</sup> Party Data
- Workflow
- Outlet for Data Governance





## Where to Look for MDM Opportunities







The **products** you make and the services you offer

The **supply chain** for those products and services Business operations (hiring, procurement, after-sale service, etc.) The intelligence used in **designing** your **product and service** set The intelligence used in the **marketing/ approval funnel** for your products and services



### **MDM Misconceptions**

- MDM is only customer/product data
- MDM is unnecessary with ERP/CRM
- MDM is just one thing (e.g., data integration)
- MDM is only for IT
- MDM is a one-time project, rather than an ongoing enterprise strategy
- MDM is expensive
- MDM projects can be staffed without business involvement.
- Implementing an MDM tool automatically fixes data quality, which requires business input
- MDM is just another data warehouse

- If you have master data, you must use MDM workflow, or conversely, MDM doesn't have workflow
- MDM is not for syndicated data
- MDM is only for operational or analytical data
- All MDM subject areas take as long as the first to implement
- MDM doesn't change job roles
- A "half job" or other systems are as effective as dedicated MDM for core master data
- MDM can succeed without business buy-in and sponsorship
- MDM is optional for becoming a data-driven organization



# Automation & Al in MDM

### **Automation**

- Automation is an ease of use capability
- If the platform provides some automation of what would ordinarily be manual tasks for MDM and IT personas, it is at least partially automated
- Sometimes, this automation is enabled by AI
- For tasks or features that are not fully automated, we assess the **time and effort** required to complete the task (data entry, configuration, development, etc.)





### **Automation in Data Quality**

- There are **automation features** related to data quality capabilities, including validation and **assignment**
- In quality rules and tools and data verification, there are automated corrections that enable the system to apply predefined fixes to data quality issues
- For data matching, **scoring thresholds and auto actions** are utilized, allowing the platform to automatically perform actions based on the calculated match potential



### **Automated Corrections in Data Verification**

- Automated corrections are a feature available within data verification processes
- This applies predefined and recommended fixes automatically to data
- The application of these automated corrections helps in the **standardization of data and removal of anomalous patterns** in fields like address, phone, and email.



### **AI/ML Enhanced Search**

There is an **AI/ML enhancement in entity search** that utilizes **OpenAI to convert plain text into search criteria**. This allows users to input search queries using natural language, which is then translated into a structured format for the system to process.

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### **AI/ML Enhanced Search**

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Profile	Entity ID	Q Search & add attributes		
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Nec Corporation	0006xmE			
Scelerisque Lorem PC	0000mB0	- Name		
Magna Consulting	0002Yzi	Eanguage     Former Organization Primary Name		
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] 02/13/2025 4:32	2 PM	
] 02/13/2025 4:32	2 PM	





### **Data Discovery and Domain Identification**

- Manually inspecting vast amounts of data is inefficient. ML techniques like clustering and semantic tagging automate this process.
- Machine Learning Techniques
- Semantic Labeling
- Learning by Association
- Entity Discovery
- Column Signature Analysis
- Natural Language Processing (NLP)





### **Entity Resolution**

- Rule-based and probabilistic matching struggle with data variations and scalability. Supervised learning models can learn from labeled data to accurately predict matches, reducing the need for manual intervention.
- Supervised learning models
- Machine Learning Rules
- Inferring Relationships
- Long-Term Automation





### Lineage, Modeling and Mapping

- Al automates the mapping of **how master data moves** across systems by scanning technical metadata and applying ML-based relationship discovery.
- Al aids in schema matching by **finding mappings** between semantically related data models and recommending core attributes and hierarchies.
- Al (using genetic algorithms, NER, and NLU) **automates the ingestion and mapping** of data to master data models, including product categorization using text classification methods.
- Al identifies duplicate records and **recommends consolidation strategies** using a combination of declarative and ML rules, with active learning for continuous improvement.
- Al **infers relationships** between master data domains and other data types (transactions, interactions) to create a cross-domain knowledge graph using techniques like column signature analysis and NLP.
- Al maps business glossary definitions, policies, and data owners to master data using domain discovery, data similarity, and NLP, improving collaboration and accuracy.



### **API-First Approach**

- An API-first strategy means that all functionality within a data management platform is accessible via its APIs
- This approach allows businesses to **build flexible**, scalable, and customized data solutions
- It ensures real-time access to high-quality, connected data
- This strategy empowers organizations to leverage their data more effectively within modern cloud ecosystems
- Such an API allows for the programmability of almost any UI or backend functionality



### **No-Code/Low-Code Development**

- Hubs with impressive no-code/low-code development capabilities
- Includes a large number of pre-built connectors (1,000s)
  - Concept of "Recipes"
- Integrations can be created with drag-and-drop effort
- Monitoring and orchestration tools that make it relatively easy to use
- Data pipelines specifically built for major cloud data warehouse platforms, allowing for the dropping and syncing of entire master data sets for further processing
- Embedded help and links to documentation within each connector
- Features like a monitoring dashboard, dependency graph, and activity audit
- The ability to create custom connectors





### **Workflow Automation Features**

- Automated workflow design and deployment, using Al-driven drag-and-drop functionality to create complex workflows.
- Conditional logic and decision-making are automated, minimizing manual intervention.
- Pre-built and automated components and services for common workflows, tasks, and services, such as:
  - Automated entity CRUD operations review
  - Al-driven data change request management
  - Automated matching and verification/validation
  - Automated notification sending
  - Automated interaction with webhooks or external services





### **Workflow Automation Features**

- Automated creation and deployment of custom components, services, or tasks using low-code or no-code tools.
  - This automation enables organizations to tailor their workflows to their unique needs without requiring extensive development resources.
- Workflows automatically triggered by data changes, eliminating manual intervention.
- Automated notifications alert users or systems about data changes, workflow actions, or anomalies based on configurable triggers.
- Automated task management, prioritizing and assigning tasks to users or systems based on predefined rules.
- Automated task tracking and reporting ensure timely completion of workflow tasks.



### **Automated Recommendations for Data Stewards**

- Using AI to apply automated recommendations to data stewards task lists
- Learning patterns in accept/reject decisions for golden record matches
- Applying predictive models to recommend actions for data stewards
- Prioritizing tasks based on urgency, complexity, and business impact
- Providing real-time insights and recommendations to support data steward decisions



### **Completion of Text Fields**

- Use LLMs to **generate descriptions automatically**, potentially for data entities.
- Using AI to apply automated recommendations to data stewards task lists.
- This includes learning patterns in accept/reject for golden record matches.
- This feature is associated with manual cleansing and Create, Read, Update, Delete (CRUD) operations for data stewards
- i.e., Car seats -> Includes any product that can be used as a baby car seat or booster seat. This includes car seats that are designed for infants, toddlers, and older children, as well as booster seats that are designed to be used with a seat belt.

Basic Parameters Prompt Edger		
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		+ S(TONE) + S(WEBSITE_LINK)



### **Prompt Engineering**



- Curating the LLM market & creating the prompt for consistently populating text fields
- Used as a tool for a user to retrieve answers from an AI resource
- Guards against hallucinations with appropriate details in the query
- Define objectives, context, personnas, give examples, specify required steps, define length limitations





- These agents can run automatically as data enters a system, or certain events occur, leveraging AI on an agent basis
- Intelligent Data Matching: Agents can analyze data and make decisions on matching and merging records.
- Data Quality Monitoring: Agents can monitor data quality and detect issues, such as duplicates or inconsistencies.
- Event-Driven Data Updates: Agents can respond to specific events, such as data updates or changes, to ensure data is up-to-date and accurate.





### **Data-as-a-Service**

- **Real-time** access to accurate, curated, and standardized data, reducing manual data collection and processing efforts.
- Scalable data management, allowing organizations to handle growing data volumes and complexity without manual intervention.
- Automated data integration from various sources, reducing manual data mapping and transformation efforts.
- Built-in data quality and validation checks, ensuring accurate and consistent data across the organization.
- Real-time data updates, ensuring that master data is always current and accurate.



### **Building Trust in AI and Automation**

- Transparency
- Reliability
- Auditability
- Explainability
- Continuous Monitoring
- Organizational Change Management





### **Human Oversight**



- Al offers significant automation capabilities, but human involvement remains crucial.
- Outlier detection often requires human review to validate anomalies.
- Active learning enables non-technical users to train and retrain ML models.
- Technology alone is insufficient to replace good data management processes.
- Human oversight and judgment are necessary to ensure accurate and reliable data management.





- Master Data is not an Option
- Robust MDM is half of the effort for project successes
- Automation is abundant now in MDM
- It provides Automated corrections, data quality checks, and entity resolution improve data accuracy and consistency
- Al-powered data discovery, lineage, and search enable efficient data identification, tracking, and retrieval are becoming automated
- Also contributing to automation are an API-first approach, no-code development, and workflow automation simplify MDM processes and reduce manual effort
- Al-driven decision support includes automated recommendations, prompt engineering, and data-as-a-service capabilities support informed decision-making and business outcomes
- Trust must be built in automation/AI and human oversight is essential





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