

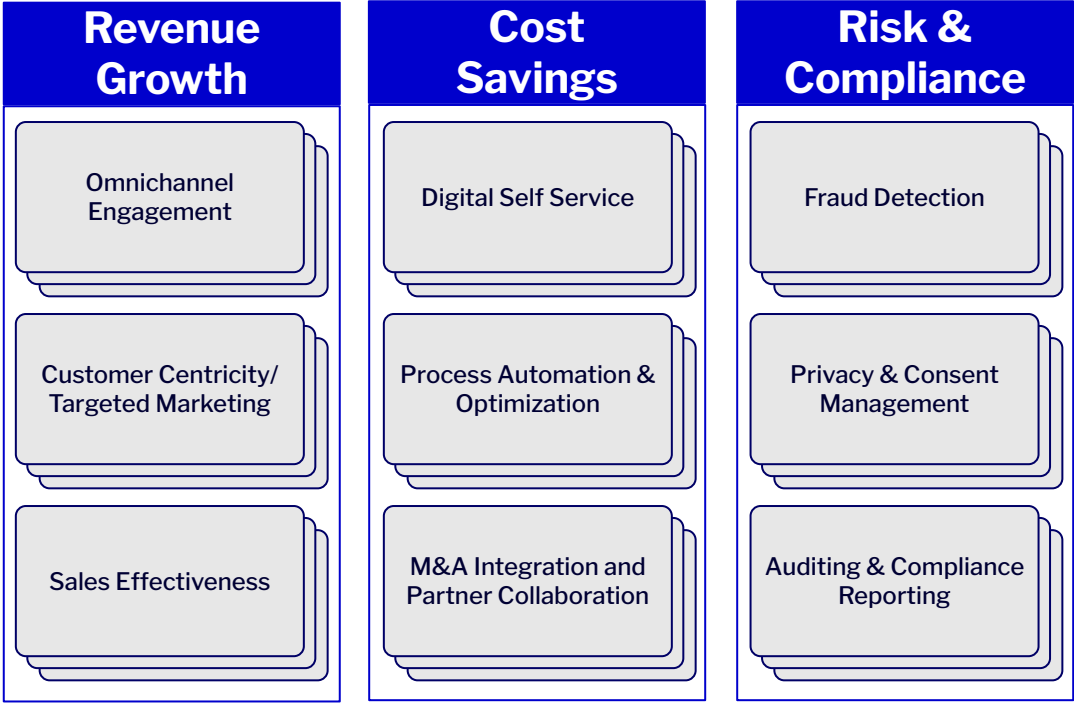
AI-Powered Master Data Management for Simplified Data Governance

Guy Vorster, Principal Solutions Consultant, Reltio

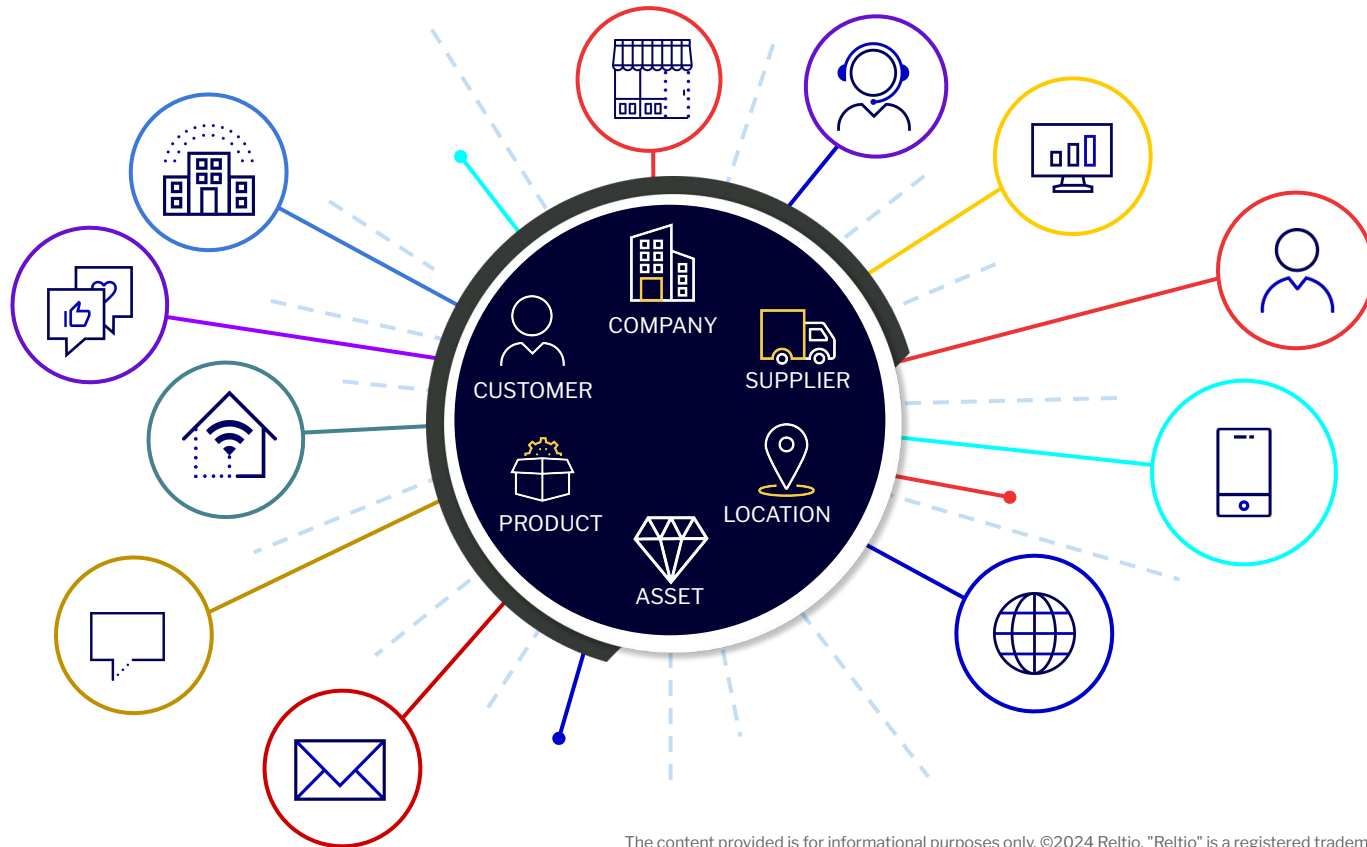
RELTIO



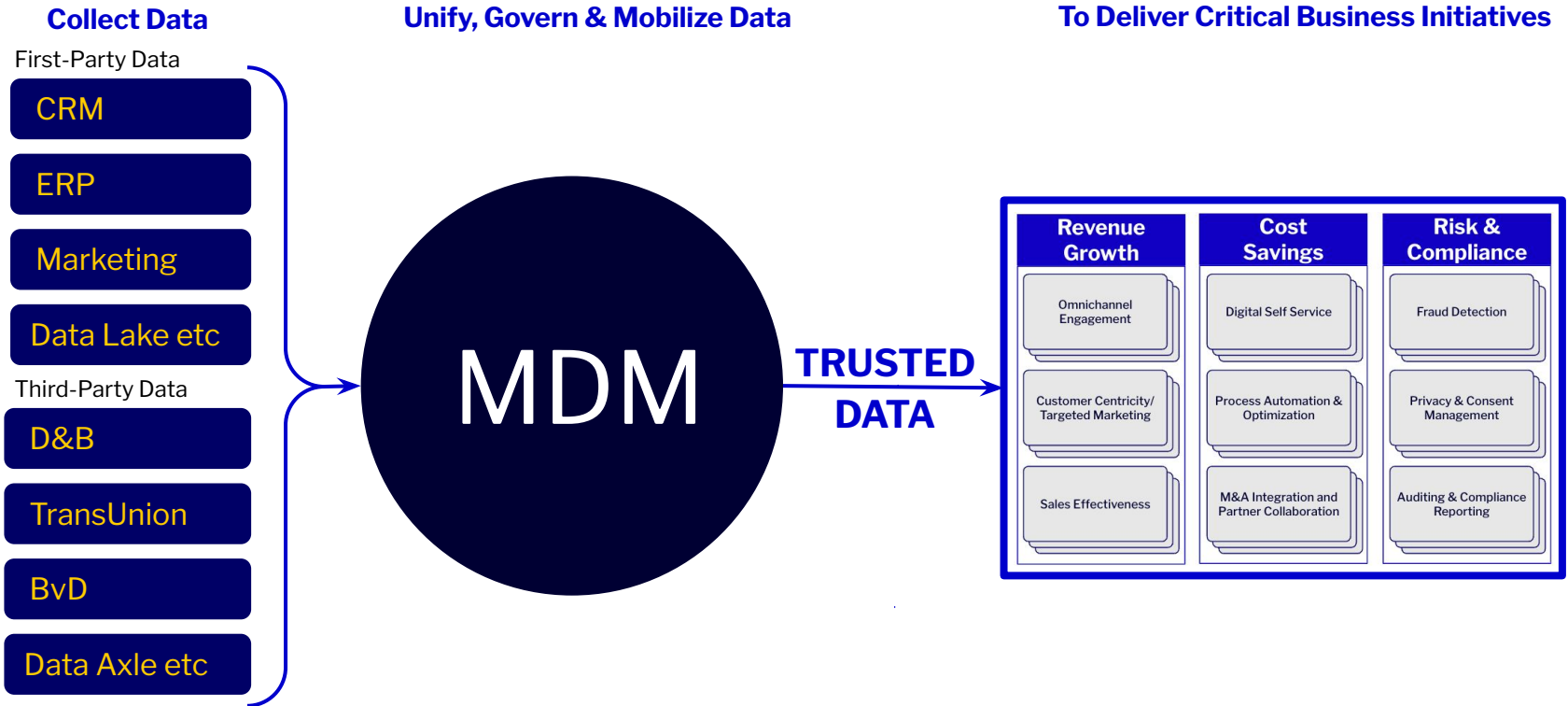
Organizations care about **three areas** in their business



Organizations need **trusted data** to deliver on their objectives



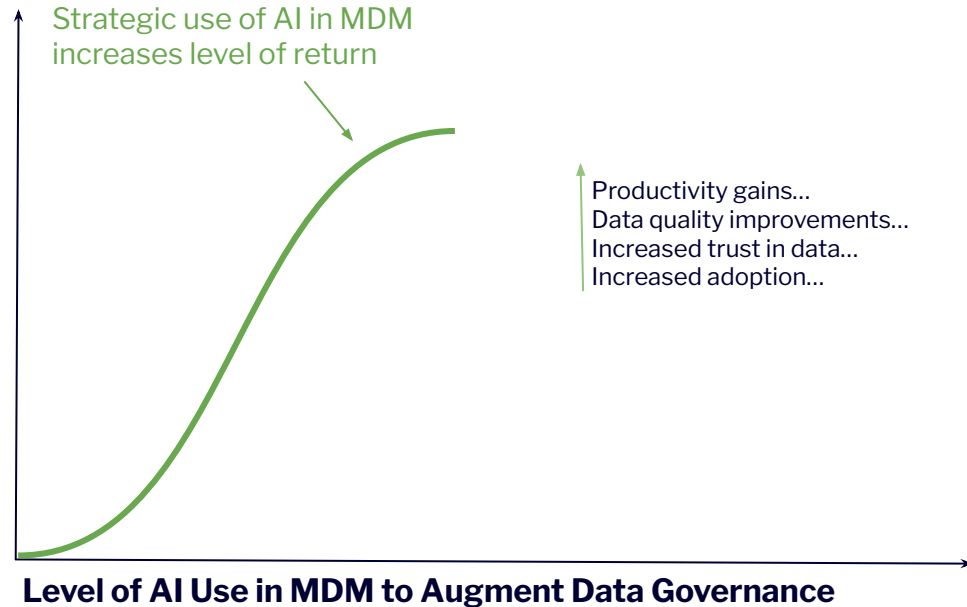
MDM platforms have a **big responsibility** in an enterprise data architecture



Strategic & thoughtful use of AI in MDM can simplify data governance efforts

Bulk Update / Delete	Onboarding New Datasets
Data Profiling	Duplicate Review
Data Quality Rules & Thresholds	Change Request Workflows
Data Cleansing	Merge / Unmerge
Enrichment	Data Delivery
Data Discovery	Data Quality Monitoring
Data Definitions / Glossary	Data Access Controls
Data Archival	Hierarchy Management
Data Classification	Anomaly Detection
Householding	...

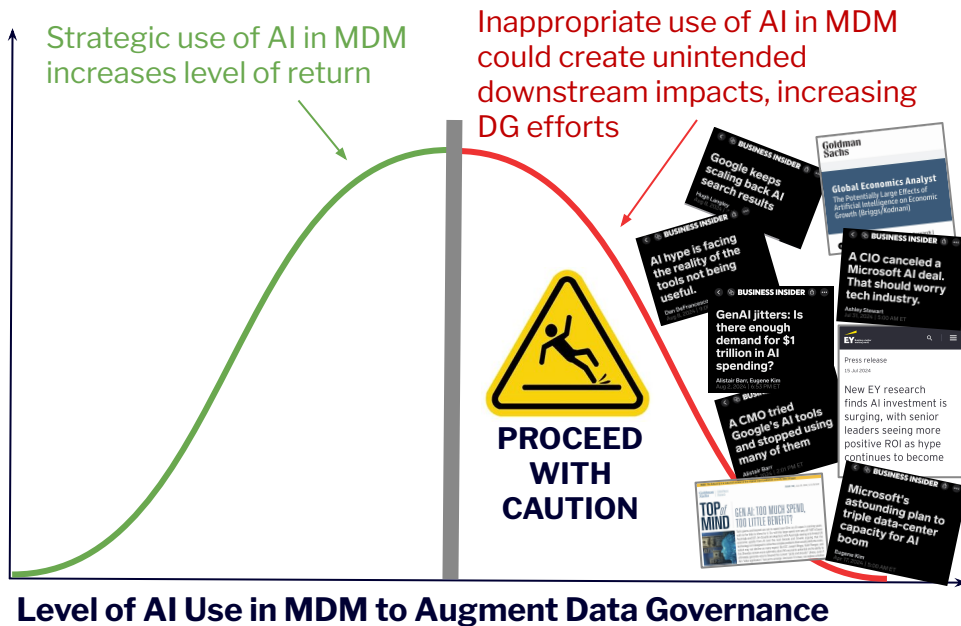
Level of Return from your Data Governance Efforts



Inappropriate use of AI in MDM could have adverse data governance effects

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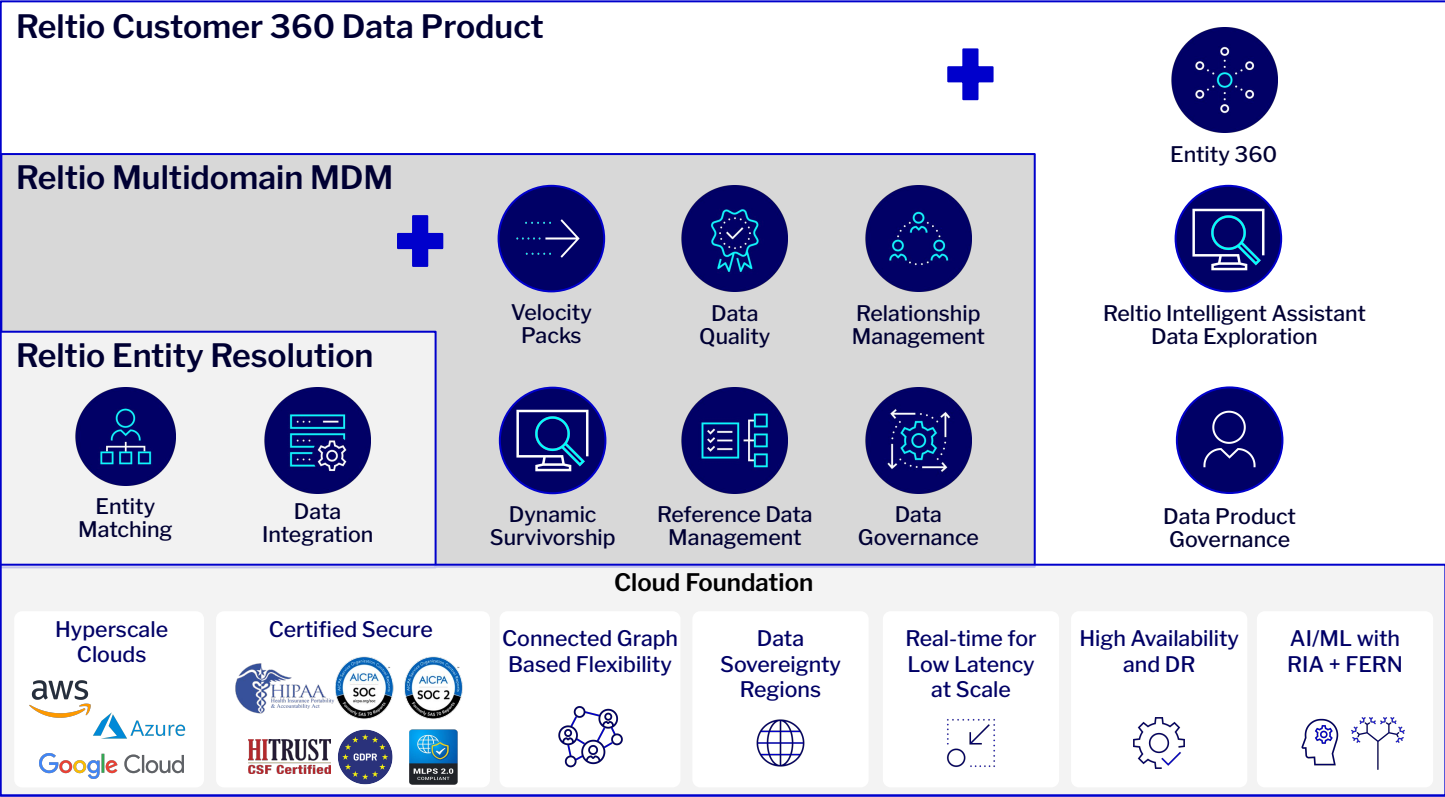
Level of Return from your Data Governance Efforts



How Reltio Simplifies Data Governance

1. Delivering a SaaS based platform that's ready on day 1
2. Decreasing level of effort with pre-configured solutions
3. AI-powered simplicity for matching & merging (FERN)
4. AI-powered simplicity to assist new users / novice users (RIA)
5. Continued innovation based on customer feedback

Reltio products powered by Reltio Connected Data Platform



Your day 1 experience with Reltio



Multiple Environments - Development, test, & production + RDM tenant



Preconfigured UIs for data stewards, business analysts, & administrators



REST API's for real-time use and streaming



Reltio Integration Hub - optional low-code / no-code UI for inbound & outbound integration



Third-Party Enrichment - NPI, DEA, 340B, D&B, BVD, and others fully integrated



GenAI-based Innovation - FERN (Flexible Entity Resolution Network) pretrained ML for matching individuals. RIA (Reltio Intelligent Assistant) as conversational assistant.



Preconfigured Industry Specific Velocity Pack - Entities, attributes, relationships, interaction types, match rules, data validation rules, survivorship rules, stewardship UIs, dashboard charts, governance workflows, industry-specific ref data, implementation methodology etc

RELTIO

3 Upgrades Per Year
- No Downtime

Weekly Patches -
No Downtime



Reltio's journey toward AI-powered simplicity in match / merge

Rules Based
Matching

Active
Learning ML

Research
into LLM

FERN LLM

2011

2020/1

2022/3

2024

Exact, Fuzzy,
AND/OR/NOT
Soundex, Metaphone,
Damerau etc...

Training a machine
learning model via
simple yes / no to
match pairs

Research into use of
transformer networks
for matching,
particularly LLM's and
generative modeling

Only configuration is
setting thresholds for
auto vs manual...

Configuration effort decreases, simplification increases...

Introducing FERN: Flexible Entity Resolution Networks—*patent pending*

Private, secure large language models (LLMs) to automate data unification at scale

- **Zero-shot learning** means no training or rule creation required—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—customer data never leaves the tenant
- **Explainability** built in for match recommendations*
- **Global impact** with natural language processing of 60 human languages (English, Spanish, Chinese, etc.)

*: Coming in October 2024

Label	Description	Version	Match method	Enabled
Pretrained FERN for Individual	This entity resolution (ER) matches Individual entity type using pretrained Flexible Entity Resolution Networks (FERN) model provided by Reltio	0.6.4.0	Pretrained FERN	All

Edit match model for Pretrained FERN for Individual (Version 0.6.4.0)

Status: Enabled

Scope: Internal External
Internal: match records within the tenant. External: match external records against records in the tenant.

Match by Operational Value (OV) only
Enable if you wish to match only on the OV of the attribute

Set relevance match score

Match action	Action label	Relevance score range
Create potential matches	High confidence	0.9 to 1
Create potential matches	Medium confidence	0.75 to 1
Create potential matches	Low confidence	0.5 to 1

Map required attributes

CANCEL SAVE

GenAI-based conversational UI to explore data and search knowledge

Reltio Intelligent Assistant (RIA)

- ✓ **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 and 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*

*Data exploration and segmentation with RIA is exclusively available to Reltio Customer 360 Data Product users

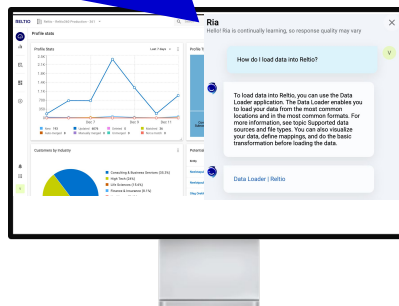
Ask RIA ...

“Find individuals with missing emails in Colorado”

“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



Let's Have a Look!

1. AI Powered simplicity for match / merge:
 - a. FERN in the Reltio Console
 - b. FERN in the Reltio Stewardship UI
2. AI Powered simplicity for novice users:
 - a. RIA knowledge search
 - b. RIA data search
3. Data Governance simplification in general:
 - a. Search experience
 - b. Data quality dashboards
 - c. Enrichment
 - d. Workflow inbox
 - e. Reference Data Mgmt etc



RIA Data Explorer Skill - Screenshot

show me People with Multi Channel Communication Consent / Channel Type of Email

I discovered 7179 individuals who have given consent for multi-channel communication via email.

Profiles	Channel Type
Tobias Pope	Email
Curtis Huling	Email
Millicent Ranch	Email
Dodie Mathieson	Email
Irish Hruska	Email
Sandra Marsh	Email
Nancie Poalino	Email
Roth Barrera	Email
Ora Vazquez	Email
Kizzle Darco	Email

View in Search page 1-10 of 7,179

from the list above, which of these individuals are in New York

I have found 501 individuals who have given consent for multi-channel communication via email and reside in New York.

Profiles	Channel Type	State or Province
Leland Brunick	Email	New York
Ardell Janish	Email	New York
Jessamine Luna	Email	New York
Maryalice Lisowe	Email	New York
Malvina Minge	Email	New York
Julee Goff	Email	New York
Lewis Key	Email	New York
Christopher Kartye	Email	New York
Hayes Rodriguez	Email	New York
Adriane Ashbourne	Email	New York

View in Search page 1-10 of 501

RIA Documentation Search Skill - Screenshot

RIA - Reltio Intelligent Assistant

Hi! I'm RIA. I can answer questions for you related to Reltio. Please know I'm still learning. Your feedback will help me improve.

how do i enable householding in reltio

To enable householding in Reltio, you can follow these steps:

1. In the Console, select Data Modeler.
2. In the left navigation pane, select Grouping types.
3. Click Create grouping type.
4. Enter a name and description for the grouping type.
5. Select the Householding option.
6. Click Create.

[Enable grouping types | Reltio](#)

RELTIO DOCUMENTATION

How can we help?

Discover Start **Explore** Model Integrate Engage


Explore > Get your bearings in Reltio > Get your bearings in Reltio Multidomain Master Data Management > Console > Configuration applications > Data Modeler > Automated householding



Enable grouping types

You need to have the `ROLE_TENANT_ADMIN` role to enable grouping types. For more information, see topic [Tenant Administrator Role Across all Services](#).

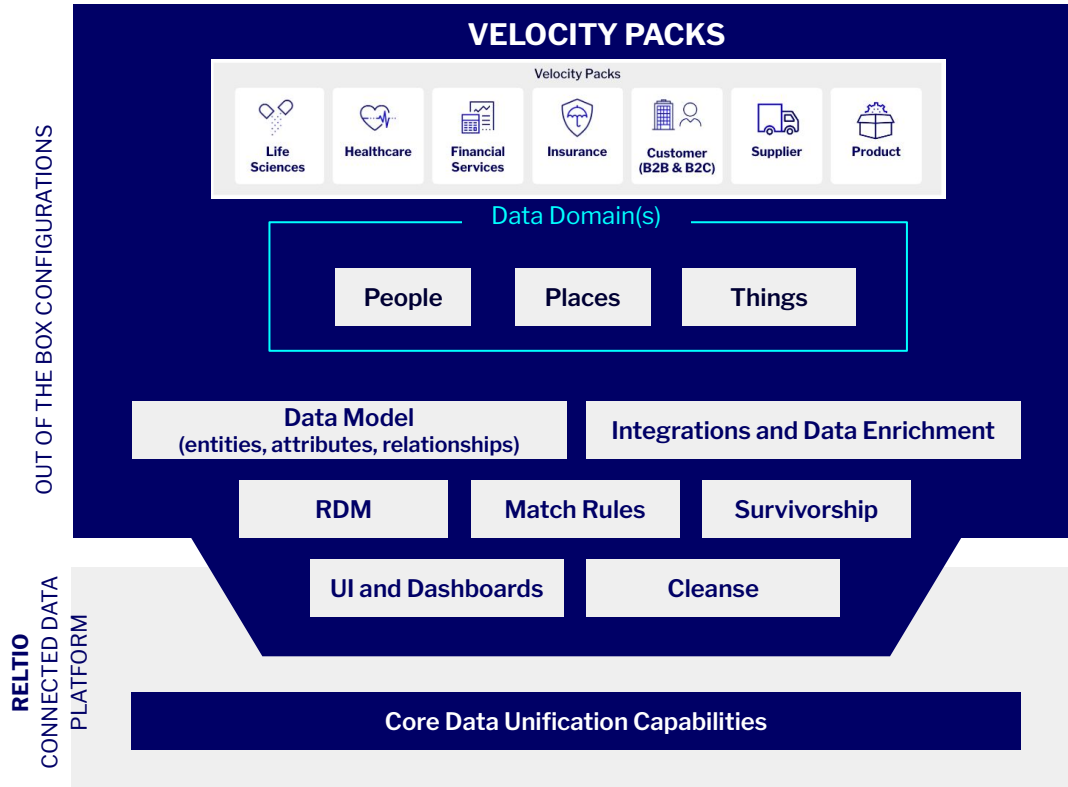
You can use the **Grouping type** feature to group your customers into householding groups using match rules. This in turn automatically maintains and updates the group's householding data as your data changes. For more information, see topics [Automated householding](#) and [Get started with grouping types](#). You must enable this feature in your tenant, to use it effectively.

To enable Grouping types in your tenant:

1. In the **Console**, select **Data Modeler**.
2. In the left navigation pane, select **Grouping types**. You will see the following image:
3. Select **Let's Get Started** to enable this feature in your tenant. You can now start create grouping types. For more information, see topic [Create grouping type configurations](#).

Was this content helpful?  

Simplifying your journey to go-live with velocity packs



Simplifies and accelerates deployment with:

Out-of-the box, industry-specific configurations and data models

Prescriptive implementation with predefined assets enabling 2-, 6-, and 10-week value milestones

Prebuilt connectors to popular applications and data enrichment sources

Trusted, unified data at the speed of business



Real-time, secure

- Continuous curation and governance for high-quality core data
- Up-to-date data accessible where needed
- Intuitive, self-service interface for business teams
- Built-in security and privacy



Flexible and scalable

- Extends to any data source or domain
- Flexible data model adapts to your business
- Rapid scalability and integration
- Open ecosystem, responsive architecture



AI-driven innovation

- Pioneering gen AI and LLM use for data unification
- GenAI-powered, conversational assistant
- Patent-pending, LLM-driven, pretrained ML model for entity resolution with zero-shot learning and no rules needed
- Horizontal and industry-specific pretrained ML models



Fast time to value

- Prebuilt velocity packs incorporating market expertise
- Low-code/no-code integration development and prebuilt integrations
- Prescriptive delivery methodology with go-live in 90 days

Reltio delivers on today's business needs



FAST TIME TO VALUE

Prescriptive implementation. Velocity packs. No lengthy install required.



IMMEDIATE COST SAVINGS

Zero-downtime, zero-cost upgrades. Built-in scalability.



SIMPLIFIED & EASY TO USE

Low-code/no-code development. Prebuilt connectors. Agile & flexible.

BATTLE-TESTED. ENTERPRISE-GRADE.

12+ years cloud-native SaaS. Real-time operational use cases with Fortune 100. Multicloud. Multidomain. API-first.