

SAP MDM Assessment Questionnaire: Getting the Approach Right



Applies to:

SAP Master Data Management. For more information, visit the [Master Data Management homepage](#).

Summary

Initial approach to any client seeking MDM as a solution for all their needs should be accompanied by a first round of questionnaire or assessment to get the right feel of the requirements and using which you can design the best possible tailored approach for the client. This article will try to cover some basic questions for initial assessment. However these questions are just recommendations and the list is not exhaustive. Also these questions are not exhaustive enough to be part of any phase of ASAP methodology. These are intended for Initial approach only.

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Overview

Initial approach to any client seeking MDM as a solution for all their needs should be accompanied by a first round of questionnaire or assessment to get the right feel of the requirements and using which you can design the best possible tailored approach for the client. This article will try to cover some basic question settings for initial assessment .However these questions are just recommendations and the list is not exhaustive. Also these questions are not exhaustive enough to be part of any phase of ASAP methodology. These are intended for Initial approach only.

I have tried to divide the scope of questionnaire broadly into the following categories:

Architecture and Landscape
Systems in Scope
Scenarios
Current MDM Trend
Third Party tools
Master Data in Scope
Middleware used
Business Users

Architecture and Landscape

This is the starting point for any MDM assessment questionnaire as the landscape acts as a spinal cord to entire solution designing. Here you have to interact with Centre of Excellence of client (if any) to dig out the information needed.

The basic questions should be set to narrow down your understanding about if the landscape already has MDM tool, do the client prefer having multiple local instances of MDM on Business Unit basis or do they have one global MDM service instance. Next focus is on understanding overall systems involved in leveraging Master Data(SCM planner, BI etc) ,Position of these systems and presence of any integrated ETL tool. Some sample questions might look like the following and right side column will be filled after interaction with the client

Architecture and Landscape	
Single Country MDM instance/Multiple Country roll out	Single
Multiple MDM tools present	Yes
How many systems leverage master data for local /transactional data?	1 to 3
Approach for current Master Data	Centralized(with single instance)
ETL tools to be integrated	1 to 3

Systems in Scope

This section as the name suggests will focus on listing down all the systems in the landscape and assigning relative complexity if needed to integrate these with MDM. Identifying systems at this stage will help you in freezing the scope of work, estimation, skills identification, Planning, Governance and Approach. You can also include other systems which need to interact with MDM at any stage of Data lifecycle. One such sample

Systems in Scope	
Legacy accepting XML or flat file format	Medium
Legacy with Unique File formats	Complex
SAP ECC	Medium
ECC SRM	Medium
ECC BI	Medium
GDS	Complex

Scenarios

Next input will be regarding the scenarios which are of interest to client. You need to identify the scenarios and have to check if few are already implemented. If implemented what is the methodology followed. This is important as the maximum work you can get from client depends on identifying the need for implementing various scenarios. For example a typical CPG industry might be interested in CMDM but a good analyst might identify the scope for GDS and can sell it to the client. Sample questions to be covered are

Scenarios
Consolidation and Harmonization
CMDM using Portal
CMDM using Data Manager
MDM GDS
Printing and Publishing
CDI
SRM MDM

Current MDM Trend

Now comes the most important point for observation. Every industry is managing master data by some way or the other depending on their work culture, nature of business, Mergers and Acquisitions etc. The questions related to this section will need a detailed discussion with CIOs of various departments and IT support to arrive to a conclusion. The aim should be at having a feel of how is Master Data managed? What level of governance is involved, Business users involved, level of automation in current practice etc. This basically will make the maximum share of the pie chart for questionnaire.

Sample questions:

One question of relative importance would be how the client is currently managing the future M and A (Mergers and Acquisitions) as this is the biggest pain area for any aggressive gigantic market player which of course a good solution should aim at.

Current MDM Trend
Dedicated Department for Data Governance
Distribution of Data using Globally accepted format
Data Cleaned globally before distribution
Rules and validations defined globally
Data Created locally for each department
Master data CRUD requests have workflow
Current Trend Scalable for future M and A

Enrichment Architecture

I can not vouch for the effectiveness of this section but I personally like it to be the part of initial assessment as now MDM has brought so much readymade solutions for industry that integrating it for enrichment is an easy walk. Clients who are unaware about the integration or currently not integrating the enrichment services right way can be a good target audiences for this section of questions.

Third Party tools
D and B enrichment
BO enrichment
Any third Party enrichment

Master data in Scope

No Points for guessing for this section. A very obvious and self explanatory section which focuses mainly on identifying if there are only standard master data objects or one has to pull up socks for some customized master data also. This section is important as it will form the foundation for you on top of which you can decide how much of standard business content can be used.

Master Data in Scope
Material
Vendor
Customer
Business Partners
Employee
Products
Catalogues
Customized master

Middleware Used

This is very important section for deciding the amount of work needed for file conversions, setting the validations at Schema level, Leveraging of IDOC structures and planning to deal with Legacy systems.

This section basically does a diagnosis of the middlewares used, their positioning and the purpose. Also check what are the current expectations of client from the middlewares .The best would be the Technical staff to answer these questions

Middleware used
PIXI
TIBCO
Others or Mixed

Business Users involved

This section deals with the capturing of details of various business users involved in entire Master data Management life cycle. Typical questions are -Is there a standard way or workflow to carry out the CRUD operations? What all business users are involved for Data cleansing and governance respectively. This section helps in designing of a new workflow and addressing the stake holder's concerns.

Business Users
Business Users Hierarchy common globally
Local Roll outs have different business users
Global accepted standard for Master Data CRUD operations
Workflow used amongst business users

Miscellaneous

Apart from this the majority of time goes to identify the answers for the questions that help you to frame the best possible solution keeping in mind to achieve the following-

- ✓ Right Data Governance
- ✓ Immaculate Data quality
- ✓ Easy yet effective workflow
- ✓ Secure SOA enabled model
- ✓ Addressing maximum stake holder's concern
- ✓ Open model for future expansion and integration.

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