THE PRACTITIONER'S WORKBOOK

The Trust-First Toolkit

11 Templates to Get MDM Funded, Launched, and Delivering Value

The templates practitioners use to get an MDM program funded, launched, and producing results. Fill them in. Adapt them. Bring them to the meeting.

Companion to the book When Your Systems Can't Agree: An Executive Field Guide to Master Data Management Using the Trust-First Framework — available on Amazon.

Shiva Challa
Data Architect and MDM Practitioner | 20+ years
challa.net | linkedin.com/in/Shivachalla

How to Use This Toolkit

These are not theoretical frameworks. They are the tools practitioners use to get an MDM program funded, launched, and producing results. Fill them in. Adapt them to your organization. Bring them to the meeting.

The Order That Works

Step	Template	Purpose
1	Template 1	Get funded
2	Template 2	Pick where to start
3	Template 3	Quantify the case
4	Template 4	Find your champion
5	Template 5	Define governance
6	Template 6	Confirm you are ready
7	Template 8	Execute
8	Template 10	Keep momentum
9	Template 11	Define your operating model before Go-Live

Situational: Template 7 (vendor evaluation) when you are ready to buy. Template 9 (AI readiness) before deploying AI on master data.

The Trust-First Framework, in One Pyramid

Layer	What it covers
Technology (top)	Platform, integrations, matching, quality tooling
Operating Model	Stewardship, workflows, metrics, support
Organizational Alignment	Executive sponsor, domain owner, adoption
Governance (base)	Ownership, definitions, quality rules, system of record

Trust is built from the ground up. Technology only holds when the three layers beneath it do.

TEMPLATE 1

One-Page Executive Summary

Fill it out on a flight. Present it Monday.

MDM INITIATIVE: EXECUTIVE SUMMARY

BUSINESS PROBLEM:

What specific pain costs us money today?

$_____ / year in [duplicate payments / manual reconciliation /
acquisition delays / compliance findings / customer escalations / _____]

PROPOSED SOLUTION:

Domain: _____ (Vendor / Product / Customer / Employee / Location)

Timeline: _____ months to first measurable value

Executive Sponsor: _____ (Name + Title with budget authority)

Data Owner: _____ (Business unit with accountability)

INVESTMENT REQUIRED:

Year 1 (Implementation): $_____
- Governance workshops: $_____
- Platform / tooling: $_____
- Integration development: $_____
- Data steward (FTE): $_____
- External consulting (optional): $_____

Year 2 (Expansion): $_____

Year 3+ (Ongoing operations): $_____ / year

EXPECTED RETURN:

Cost reduction: $_____ / year

Time savings: _____ (e.g., acquisition integration 14 mo -> 6 wk)

Risk mitigation: [Compliance / Audit / AI readiness / Regulatory]

Revenue impact: $_____

SUCCESS METRICS (6 months): 1._____ 2._____ 3._____

SUCCESS METRICS (12 months): 1._____ 2._____ 3._____

DECISION REQUIRED:

Approve $_____ for a _____-month MDM pilot.

First value delivery: _____ (Month / Year)

APPROVED BY: _____ DATE: _____

If you can't quantify the pain in dollars, you're not ready to ask for budget. Measure the cost of chaos first.

TEMPLATE 2

Domain Selection Scorecard

Don't guess where to start. Score each domain.

Criteria	Weight	Customer	Product	Vendor	Employee	Location
Business pain ($ impact)	30%	__/10	__/10	__/10	__/10	__/10
Clear ownership	25%	__/10	__/10	__/10	__/10	__/10
Executive sponsorship	20%	__/10	__/10	__/10	__/10	__/10
Current data quality	15%	__/10	__/10	__/10	__/10	__/10
Low political complexity	10%	__/10	__/10	__/10	__/10	__/10
TOTAL	**100%**	____	____	____	____	____

Scoring guide:

Business pain: 10 = >$500K/yr, 5 = $100 to 500K, 1 = <$100K or unclear. Ownership: 10 = single owner, 1 = political battle. Sponsorship: 10 = committed C-level with budget, 1 = IT-driven. Quality: 10 = <5% duplicates, 1 = >30%. Political complexity: 10 = one stakeholder, 1 = cross-enterprise turf war. Fewer source systems is better for a first domain (2 to 4 ideal).

Winner: highest score. If tied, pick the clearest ownership.

REFERENCE

Industry Starting-Point Matrix

Before you score, use this to see where peers in your industry typically begin and which data elements carry the most risk. A starting point for the scorecard, not a substitute for it.

Industry	Primary Domains	Emerging Domains	Critical Data Elements
Banking & Finance	Customer (B2C), Account (B2B), Reference Data	Regulatory / AI-grounding data	KYC/AML identifiers, Legal Entity ID, Credit Rating
Healthcare	Patient, Provider, Facility/Location	Payer data, Sustainability	NPI numbers, Credentials, FHIR/HL7 endpoints
Manufacturing	Product (SKU), Materials/BOM, Supplier	Supply-chain emissions, Digital Assets	Part numbers, ISO 8000 specs, SDS files, REACH/RoHS
Retail	Product (PIM), Customer (B2C), Location	Digital/Media Assets, Labor data	GTIN, customer preferences, warehouse stock levels
Insurance	Policyholder, Claimant, Contract	Risk-model grounding data	Policy dates, statutory reserves, producer commissions, risk codes
Logistics	Location (GIS), Warehouse, Asset/Fleet	Scope 3 sustainability	Postal boundaries, carrier codes, GPS coordinates, maintenance schedules

Use it as a prompt, not a prescription. Your highest-pain, clearest-ownership domain wins, even if it isn't the 'primary' one for your industry.

TEMPLATE 3

Business Pain Calculator

Quantify the cost of NOT having MDM.

DUPLICATE / OVERPAYMENT

Duplicate vendor payments per year: _____ x avg $_____ = $_____

Billing errors from duplicate accounts: _____ /mo x avg $_____ x 12 = $_____

MANUAL RECONCILIATION

Hours/month reconciling across systems: _____ x burdened rate $_____ /hr x 12 = $_____

People doing this work: _____ (Could they do higher-value work? Y / N)

ACQUISITION / MERGER DELAYS

Last integration took _____ months; revenue at risk $_____

Executive time consumed: _____ hrs @ $_____ /hr = $_____

COMPLIANCE / AUDIT

Findings/year related to data quality or lineage: _____ x remediation $_____ = $_____

Potential regulatory exposure: $_____

AI / ANALYTICS READINESS

Planned AI initiatives needing clean master data: _____ (Budget $_____)

Risk if deployed on dirty data: failure / delay / damaged trust

OPPORTUNITY COST

Value of initiatives delayed by data issues (launches, decisions, revenue): $_____

TOTAL ANNUAL PAIN: $_____

If total pain is less than your MDM investment, reduce scope or rethink timeline.

TEMPLATE 4

Executive Sponsor Worksheet

Sponsorship isn't about convincing. It's about finding the person with pain and budget.

```
Candidate: _____ Title: _____
Budget authority: Y / N / Partial Directly feels the pain: Y / N
```

Qualified if they...

- ☐ Have budget for a multi-year program
- ☐ Feel the pain personally (their metrics)
- ☐ Can resolve cross-department conflict
- ☐ Will say no to scope creep
- ☐ Will attend monthly steering (1 hr)
- ☐ Understand governance precedes technology
- ☐ Have credibility with peers and board

Disqualifying red flags

- ✗ IT-driven with no business sponsor
- ✗ Delegates to a VP
- ✗ "We need it because everyone has it"
- ✗ Expects IT to "make it work" without governance
- ✗ Won't attend governance meetings

The 30-second pitch

```
"We lose $_____ /year to [pain]. I can solve it in _____ months for $_____,
 but I need a sponsor who can settle ownership disputes between
 [Sales / Finance / Marketing]. Are you that sponsor?"

Yes → kickoff invite within 2 weeks.
"Sounds interesting, but..." → keep looking.
```

TEMPLATE 5

Data Ownership Matrix (RACI for Master Data)

Define who owns what BEFORE you buy software. This prevents most failures.

Domain / Attribute	Business Owner	Data Steward	System of Record	System of Origin
Customer: Name	_____	_____	_____	_____
Billing Address	_____	_____	_____	_____
Email / Phone	_____	_____	_____	_____
Credit Status	_____	_____	_____	_____
Product: Name / SKU	_____	_____	_____	_____
Pricing	_____	_____	_____	_____
Vendor: Legal Name	_____	_____	_____	_____
Payment Terms / Tax ID	_____	_____	_____	_____
Employee: Legal Name	_____	_____	_____	_____
Role / Title	_____	_____	_____	_____

Definitions

Business Owner decides rules and resolves conflicts. Data Steward executes day-to-day. System of Record (SOR) holds the truth. System of Origin (SOO) is where data is first created (often different from the system of record).

Conflict hierarchy: When two owners disagree, who wins? _____ *(document before Go-Live)*.

TEMPLATE 6

MDM Readiness Checklist

If you can't check every box, you're not ready to start.

Business

☐ Sponsor committed

☐ Pain quantified in dollars

☐ First domain selected on pain + feasibility

☐ Ownership documented and signed off

☐ Budget approved for full lifecycle (not just Year 1)

Organizational

☐ Governance framework defined

☐ Conflict-resolution process set

☐ Data steward funded and hired

☐ Change-management plan

☐ Stakeholder communication plan

Technical

☐ Source systems inventoried

☐ Data-quality baseline assessed

☐ Integration style decided (Hub-and-Spoke / Registry / Consolidation)

☐ Platform selection criteria defined

☐ Non-functional requirements documented (performance, security, compliance)

Any box unchecked → fix it before proceeding.

TEMPLATE 7

Vendor Evaluation Criteria

Evaluate on YOUR needs, not their demo.

Criteria	Weight	Vendor A	Vendor B	Open Source
Supports your integration style	30%	__/10	__/10	__/10
Matches your data volume	20%	__/10	__/10	__/10
Handles your domain complexity	20%	__/10	__/10	__/10
3-year total cost of ownership	15%	__/10	__/10	__/10
Internal team skill match	10%	__/10	__/10	__/10
Vendor stability / support	5%	__/10	__/10	__/10
TOTAL	**100%**	____	____	____

Ask them

- How does your product handle the integration style we actually need?
- Who's your largest customer by volume?
- Walk me through real-time updates from 20+ sources.
- What's the total 3-year cost for our record count, all-in?
- Do you have references in our industry who started with our domain?

Red flags

✗ "We can do everything."
✗ Demo runs on their sample data, not yours.
✗ No pricing until a "scoping engagement."
✗ No references in your industry.
✗ Timeline too good to be true.

TEMPLATE 8

First 90-Day Plan

Month 1: Governance Foundation

Kickoff with sponsor and stakeholders. Document pain and success metrics. Confirm ownership for the first domain. Identify the data steward.

→ Deliverable: signed-off scope and ownership.

Month 2: Rules and Platform

Define matching (what's a duplicate?), survivorship (who wins?), quality standards, and escalation. Evaluate 2 to 3 platforms against your criteria with a proof of concept on your data.

→ Deliverable: governance rulebook + platform decision.

Month 3: Build and Load

Configure the platform and rules. Build the simplest integration first. Load 1 to 2 source systems. Test matching against real data and validate survivorship with business owners.

→ Deliverable: working prototype on real data from 2 systems.

Day 90 SUCCESS looks like:

- ☑ Rules approved
- ☑ Platform configured
- ☑ 2 systems integrated
- ☑ Owners have seen and validated their data
- ☑ A clear plan for Months 4 to 6

Day 90 FAILURE looks like:

- ✗ Still debating the domain
- ✗ No real sponsor
- ✗ Platform bought but governance undefined
- ✗ Working all domains at once
- ✗ No real data loaded

TEMPLATE 9

AI Readiness Audit

Run BEFORE deploying AI on customer, product, or vendor data.

Domain	Governed?	Quality SLA?	System of Record?	Duplicates <2%?	Risk
_____	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N	H / M / L
_____	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N	H / M / L
_____	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N	H / M / L
_____	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N	H / M / L

HIGH RISK 2 or more boxes unchecked → DO NOT DEPLOY. Fix master data first.

MEDIUM RISK 1 box unchecked → Proceed carefully. Expect quality issues.

LOW RISK All boxes checked → Foundation is solid. AI has a fighting chance.

Any critical domain HIGH risk → MDM first, AI second.

TEMPLATE 10

Steering Committee Agenda

Monthly. One hour. Decisions, not status.

```
Attendees: Sponsor, Domain Owners, Data Stewards, Program Lead

1. Business value (10 min) Metrics vs. target; $ delivered to date
2. Integration progress (10) Done / in-progress / remaining; blockers → escalate now
3. Data quality (10) Duplication %, completeness %, issues open / closed
4. Decisions required (20) Issue + recommendation + DECISION (skip if none)
5. Next month ( 5) Milestone, deliverable, risk
6. Sponsor guidance ( 5) What does the sponsor need to know?
```

Escalate when

- Quality is degrading
- Scope creep appears
- The steward is overloaded
- Departments deadlock on ownership
- Budget is at risk

Good committee

☑ Sponsor attends in person
☑ Decisions made in the room
☑ Focus on value, not technical detail
☑ Ends on time

Bad committee

✗ A status meeting in disguise
✗ A technical deep-dive
✗ No sponsor
✗ Issues raised but never resolved

TEMPLATE 11

Operating Model Blueprint

Fill this in before Go-Live. The platform runs; this decides what happens when something goes wrong.

STEWARDSHIP ROSTER

Domain: _____ Steward: _____ Capacity: ____hrs/wk

Domain: _____ Steward: _____ Capacity: ____hrs/wk

Domain: _____ Steward: _____ Capacity: ____hrs/wk

STEWARDSHIP CALENDAR

Weekly: Issue triage -- steward reviews open flags, assigns owners

Monthly: Quality review -- duplicate %, completeness %, SLA status

Quarterly: Domain health report -- trend, incidents, change log, roadmap

ISSUE TRIAGE PROCESS

How issues are flagged: _____

Who triages (steward / automated alert / both): _____

Resolution SLA -- P1 (data breach / system outage): _____ hrs

Resolution SLA -- P2 (quality threshold breach): _____ days

Resolution SLA -- P3 (standard quality issue): _____ days

Where issues are tracked: _____

ESCALATION LADDER

Steward resolves: _____

Escalate to Domain Owner when: _____

Escalate to Executive Sponsor when: _____

Governance committee required when: _____

CHANGE CONTROL

New attribute request -- approver: _____

New source system -- approver: _____

Matching rule change -- approver: _____

Survivorship rule change -- approver: _____

Review cycle for standing rules: _____

QUALITY THRESHOLDS (BY DOMAIN)

Domain: _____ Duplicate rate: <_____% Completeness: >_____% Latency: <_____min

Domain: _____ Duplicate rate: <_____% Completeness: >_____% Latency: <_____min

If you cannot name a steward, a resolution SLA, and an escalation path for your first domain before Go-Live, the platform will run but trust will not.

REFERENCE

Before You Sign: 10 Questions to Ask Before Funding MDM

Good answers to 8 or more mean the project has a real chance. Fewer than 5 means delay funding until the team does more preparation.

#	Question	What good looks like
1	What specific business problem costs us money today?	Quantified, not 'manage data better.'
2	Who is the sponsor and why do they care?	A named person with skin in the game.
3	Which domain first, and why?	Specific, with rationale, not 'all of them.'
4	What does success look like in 6 months?	Measurable outcome, not 'platform implemented.'
5	Who owns the data in this domain?	Named roles, not 'IT will manage it.'
6	How will we handle quality issues in source systems?	A cleanup plan. MDM won't fix garbage.
7	What's the realistic timeline and why?	Phased, 6 to 9 months to first value.
8	How many systems are in scope for phase 1?	3 to 5 max.
9	Who are the stewards, and is the role funded?	Named, with dedicated capacity.
10	What happens if we don't do this?	Specific consequences, not 'falling behind.'

Want the full playbook?

These templates come from *When Your Systems Can't Agree: An Executive Field Guide to Master Data Management Using the Trust-First Framework* by Shiva Challa.

The book is the field guide a CIO can read on a flight: why systems can't agree, what MDM actually solves, the three ways projects die, the Trust-First Framework that prevents failure, what good looks like, and why MDM is now your insurance policy against AI failure.

Chapter	What you get
1. Why Your Systems Can't Agree	Why three correct systems give three different answers.
2. Every Fix But the Right One	Why the warehouse, the "pick one" decision, and the consulting assessment all miss.
3. Why Most MDM Projects Fail	The three failure patterns, with the Target Canada autopsy.
4. The Trust-First Framework	Governance → Alignment → Operating Model → Technology, in the only order that holds.
5. What Good Looks Like	Nine years at scale: a live MDM platform across five domains and 38 systems.
6. MDM as AI Insurance	The audit you run before deploying AI on customer, product, or vendor data.
The Workbook	These templates, plus the closing field-guide tactics.

Get the book on Amazon

Search: "When Your Systems Can't Agree" Shiva Challa

challa.net · linkedin.com/in/Shivachalla