

## 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.*