Upscale your project with Expert Services
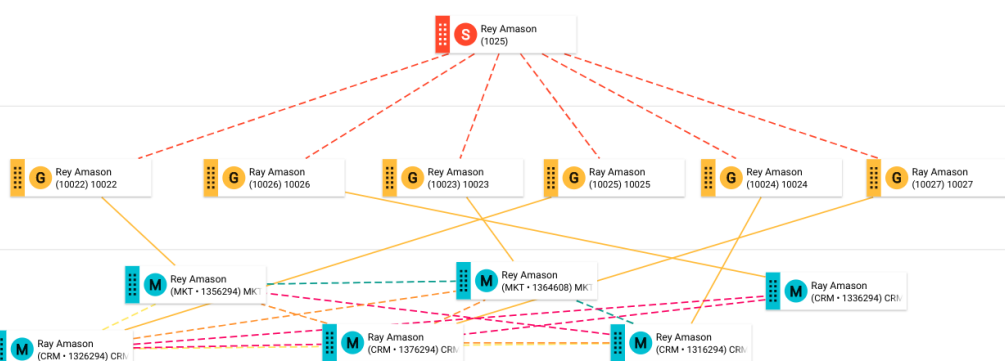
Matching Bootcamp

A detailed assessment of matching to ensure best practice for an effective match and merge strategy using Semarchy xDM.

Benefits

1 Improve outcomes for matching and merging duplicate records

2 Optimize performance of matching new records from multiple industries & domains

3 Reduced manual intervention and streamlined data stewardship processes

Suggestion 1025: To Review (Confidence Score: 71)
Suggestion 3 of 18

Deliverables

→ Best Practices

→ Matching Recommendations

→ Methodology for refining rules

PREVIOUS   ACCEPT   REJECT   MODIFY   NEXT   FINISH

Define or Review the matching process to ensure creation of a single source of truth for different mastered entities.

ENGAGEMENT DETAILS

Preliminary Tasks
→ Data Profiling
→ Analyzing Potential Matches
→ Enrichment Approaches

Understanding Matching Methodology
→ Iterative Approach to Refining Rules
→ Evaluating Match Accuracy
→ Selecting Thresholds for Merge Review

Matching Techniques
→ Exact/Advanced Match Rules
→ Survivorship, Consolidation and Override Rules
→ Grouping and Scoring Approaches

Matching Performance
→ Over-Matching vs Under-Matching
→ Using xDM Dashboarding for Match Rule Review
→ Troubleshooting Tips & Best Practices

OPTIMAL TIME TO ENGAGE

For maximum benefit, The Matching Bootcamp should take place early in an implementation. However, it is also a useful review exercise at any point in an implementation.

LOGISTICS

1 **Can be performed on-site or remotely over 2 days**

2 **Commitment from customer**
○ Time to gather prerequisites
○ Attend kick-off meeting
○ Respond to questions in a timely manner
○ Time to review and discuss deliverables

3 **Deliverables will be presented either:**

○ As slides to support an interactive workshop (useful if alternate model design options are identified).

○ Or, as a formal report.

PREREQUISITES

1. Direct or indirect access to representative data and test cases

2. Document desired or expected outcomes for this data set

3. Access to relevant subject matter experts

4. Client understanding of xDM matching concepts