



How McAfee Took its First Steps to MDM Success

First San Francisco Partners provides McAfee with data quality, data governance and architecture roadmaps

“ First San Francisco Partners far exceeded our expectations, especially in helping the project team secure cross-functional executive team commitment to the customer master data initiative.”

Julie Cullivan, VP Sales Operations

McAfee selected First San Francisco Partners (FSFP) to design a strategic master data management (MDM) project to help increase McAfee’s revenues by implementing a customer-centric operational model aligned with its business goals.

The company recognized customer data as a key corporate asset and set out to build a best-in-class customer data management capability to facilitate the company’s vision—to become the fastest growing dedicated security company in the world. McAfee understood improved customer data quality:

- Enables a better understanding of the customer to support a valued partner relationship for increased revenue opportunities;
- Supports a better understanding of a customer’s security requirements that translate into better McAfee products;
- Makes it easier for customers and partners to do business with McAfee.

Large-Scale, Complex Customer Data Challenges

Sales operations struggled with an abundance of duplicate customer records and insufficient and incomplete customer master data. Poor customer data quality left the business unable to effectively cross-sell and up-sell and renewal software license opportunities were being lost. In addition, sales forecasting, order processing and territory management were inaccurate and overly reliant on manual intervention to fix data errors. Sales productivity suffered with efforts spent to find, validate and correct customer records and manually reconcile month-end sales and commission reporting.

Business Takes Ownership of Customer Data

An earlier attempt led by IT to institute customer master data management processes lacked buy-in from sales operations and did not meet the business needs. This time, sales operations’ leadership spearheaded a new initiative to address costly and growing customer data quality issues. After all, Sales is the key stakeholder who is vested in the customer relationship and who understands the business process requirements to enhance sales productivity, increase revenue and improve the customer experience.

However, in order to transform into a customer-centric operational model the company needed to make customer data quality a core competency. Moreover, accountability was required across the organization—among business functions, divisions and geographies. McAfee identified the need for enterprise-supported data governance policies and processes and wanted to ensure the MDM architecture could support the business beyond the needs of sales operations.

McAfee and MDM

Background

- Fastest growing dedicated security company with products that secure systems and networks worldwide
- 2008 Revenue of \$1.6 Billion
- Tiered distribution model: consumer, corporate, distributors and resellers
- Combined customers of more than 1 million

Challenge

- Poor customer data quality impeding cross-sell and up-sell as well as lost license renewal opportunities
- Inaccurate sales forecasting, order processing and territory management
- Lost sales productivity due to finding and correcting customer records

Solution

- Data quality and data governance assessment
- Design and plan MDM architecture roadmap
- Cross-functional team commitment with MDM solution supporting business goals and aligned with IT

Results

- Improved customer experience
- Higher customer retention, acquisition
- Improved sales productivity
- Sales operations efficacy

The First Steps in MDM

The company sought a partner to provide an unbiased assessment of the current state of its customer data, to expertly guide an MDM architecture to fit its business needs and to design and help institute a data governance program.

McAfee recognized from past experience they had to lean on some subject matter experts. FSFP was selected having the advanced business, process and policy knowledge required to plan, architect and deploy enterprise MDM platforms. In addition, FSFP understands the importance of developing a data governance initiative early in an MDM project, and the importance of aligning business and IT for MDM success.

Improved Divisional Collaboration

FSFP rapidly conducted a thorough review of McAfee's current data quality and data architecture to gain a clear understanding of data flow and future state requirements. During a ten week engagement FSFP assessed more than 1.3 million customer records, and 500 new account openings and facilitated workshops focused on data quality, architecture, data governance and alignment across the global organization.

Fast Path to Reduced Risk and a Real World Solution

Data Governance

Most companies do not combine data governance and MDM at the same time, so they fall short of addressing the people and process issues that cause the data quality issues in the first place. The reality is that data governance is both a business and a technology issue that requires cross-functional support and assistance. Shared accountability and responsibility for ensuring data is accurate is key to MDM success. A data governance workshop helped educate and inform cross-functional teams of the importance of data governance. Subsequently, the development of a data governance strategy and roadmap specifically defined the policies, people and communication processes that McAfee could immediately put in place to support their MDM goals.

Architecture

Data governance alone is insufficient. Rather, the MDM architecture needs to effectively support the established data governance mission and guiding principles. FSFP helped to ensure that McAfee clearly understood what the requirements were for the MDM environment to effectively support the data governance mission statement and each and every guiding principle. As a result, data governance and the MDM architecture were properly aligned from the beginning of the project while being mutually supportive. Consequently, McAfee clearly saw where the gaps existed in their initial thinking about the required MDM architecture, and were provided with a clear architecture roadmap to ensure the linkage between the architecture and data governance plan were in place during a phased implementation.

Alignment

One of the biggest challenges in a data management initiative is aligning different organizations, including those with competing objectives, to work towards the same vision. This was critical to McAfee since the same customer master data that sales operations relied on was also an important information asset to the sales, marketing and finance organizations. Each of these business units has

Fast Path to an MDM Solution

Data Governance

- People and process issues linked to data quality issues; both are integral to MDM
- Data governance workshop educates and informs cross-functional teams; achieves shared accountability

Architecture

- Needs to support data governance mission and guiding principles
- Align data governance with architecture at the beginning of the project

Alignment

- Challenge across complex enterprises
- Shared, critical information assets
- Business usage and rules vary for master data types
- Alignment workshop communicates requirements and identifies

Executive Sponsorship

- Bolsters MDM success
- Needs to demonstrate organization readiness and willingness
- Executive buy-in translates into strategic focus

their own business usage and rules related to customer master data. McAfee wanted to ensure from the outset that the solution was able to extend to other master data requirements and contingent business processes to enable the future migration to an enterprise-wide MDM strategy.

An alignment workshop was facilitated by FSFP with cross-functional business units to collaborate and communicate business requirements and identify dependencies across the organization. The alignment efforts helped the business units recognize the criticality of the impact of customer data quality and processes and how they impact all stakeholder organizations. As a result, project communications across the organization have improved both cross-functional processes and data quality. And the data governance team was able to gain agreement and create near-term focus on the high priority business issues to solve first.

Executive Sponsorship

Executive sponsorship and involvement has also been shown to aid MDM success. In order to seal this commitment, McAfee's data governance team had to do their homework. Following completion of the data quality, architecture and data governance efforts the team was able to demonstrate a readiness and willingness across the organization to support the MDM strategy and gain buy-in from the executive team. Consequently, the project garnered a top down commitment as a strategic corporate initiative.

MDM Momentum at McAfee

With proper data quality, architecture and data governance planning completed, the MDM project gained significant momentum and awareness across the organization. At the same time, McAfee's data governance team was better equipped and prepared to lead the initiative with authority and credibility from the knowledge transfer and guidance that FSFP imparted. Business and IT are now working together on data management with the backing of the executive team to ensure customer data quality and that data requirements align with business needs.

All of these efforts benefit the business by improving productivity as a result of less data cleansing efforts, and by increasing sales as a result of better customer data quality. Best practices for customer data management support improved customer experiences that translate into higher customer retention and acquisition performance. McAfee took the first steps to ensure MDM success so that the company can reap accelerated benefits of a customer centric operational model while reducing project risks.

*For more information please visit
www.firstsanfranciscopartners.com
or call 1-800-612-9879*