



## Dealer Network Data Was Key Driver Imprecise Hierarchies Created Potential Security Issues

### CLIENT

A global manufacturer of construction and mining equipment, diesel and natural gas engines, industrial gas turbines and diesel-electric locomotives in a solid leadership position worldwide.

### BUSINESS DRIVERS

Financials were negatively impacted through overpayments to some dealers and underpayments to others, which created disputes and associated legal fees. The dealer hierarchy was inaccurate and not effectively managed or tracked, with incorrect resulting discounts. Unfortunately, the dealer discount system was also the system of record for Dealer Master Data.

An enterprise-wide Master Data Management (MDM) initiative was in the planning stage, which required quality data. The new system required the correct hierarchy data for dealers to enable roll up and drill down of discounts; incorrect hierarchies would have led to security issues, such as data visibility to the wrong dealerships.

### CHALLENGE

To develop a reporting and analysis system of Dealer Discounts for the client's worldwide network of independently owned and operated dealers. The new system would require the correct hierarchy data for dealers to enable roll up and drill down of discounts. The client also wanted to incorporate high quality dealer data in a new MDM solution.

### SOLUTION

Leveraging Netra's EIM Framework (see figure below), with data quality assessment and tracking templates, we recommended addressing data issues at the source, with a plan to sustain data quality on an ongoing basis.

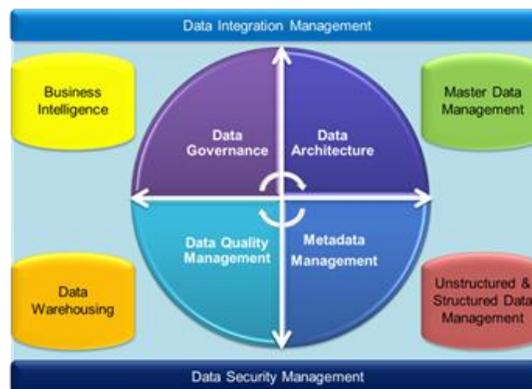
*“What is great about this solution is it laid the foundation for our enterprise-wide data governance program.”*

IT Executive

As a first step in this process, Netra profiled the data to assess data quality and then corrected and improved the data to meet business requirements. We then recommended and worked with the client team to establish a Data Governance function with data stewards and SME's to oversee ongoing data quality improvements and monitor results. We established processes and utilized data profiling technology and techniques for continuous capture of quality metrics, which were monitored and reviewed by the data stewards. We also worked in conjunction with Data Governance to build a new data model and develop business rules for dealer hierarchies. This data model and supporting business rules enabled migration of the improved data into the new dealer database.

**Netra's solution included:**

- Recommendation and plan for a data quality program
- Recommendation and assistance with establishing a data governance function
- Recommendation of data quality metrics, data profiling, and quality review process
- Recommendation and utilization of data quality management technology for dealer data
- Development of a new data model for the dealer discount system
- Development of business rules required for the data migration effort
- Migration of quality data into the new dealer hierarchy database
- Documentation and expansion of this process to prepare for the master data initiative



**Netra EIM Framework**

**RESULTS**

Millions in returns by correcting overpayments and reducing legal obligations from underpayments to dealers. A new, highly automated Dealer Discount Reporting and Analysis System based on reliable and complete data loaded in a much-improved Dealer Hierarchy database. The client also realized benefits from organizational and process improvements, including:

- A data governance function to oversee data quality improvements
- An analysis and feedback mechanism with metrics to monitor data quality on an ongoing basis
- Processes to cleanse and enhance data as necessary, based on data quality metrics

**VALUE PROPOSITION**

- Identification and assessment of data quality issues early in the project
- Recommendations and implementation of best practices for organization and processes required to address the data quality issues for this project and future initiatives
- High customer satisfaction due to close client involvement throughout the project