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Preparing for your Reltio Implementation

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Objectives

1. The Reltio Way Delivery Methodology
2. When sprinting, Ready comes before Set and Go
3. Value Blockers
4. The Reltio Way accelerates time to value
5. Team Structure
6. Reltio Professional Services roles
7. Customer/Partner roles
8. Questions

The Reltio Way Delivery Methodology

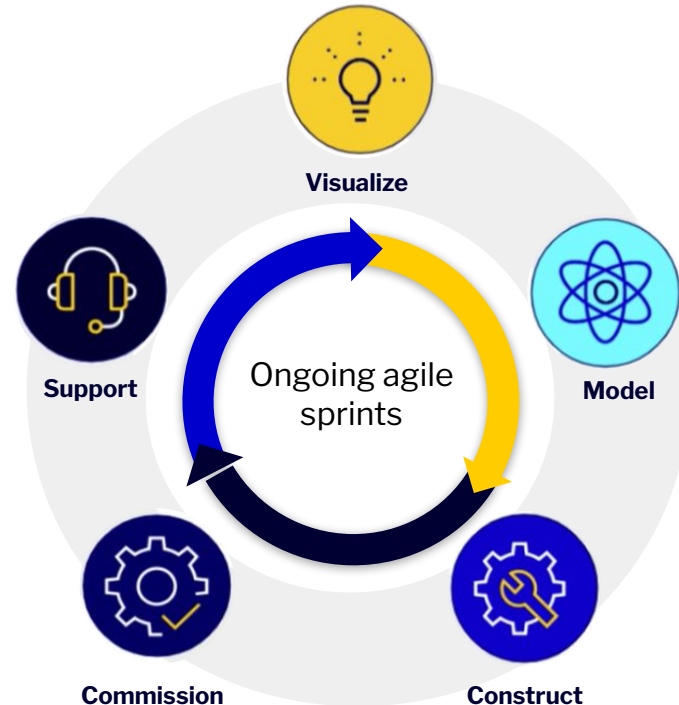
Prescriptive methodology leverages proven implementation practices and Reltio Velocity Packs to continuously deliver value and positive business outcomes.

The readiness process and checklist ensures Customers are prepared for implementations before they even start



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A framework leveraging Reltio Velocity Packs, repeatable processes, and a standardized asset library ensures continuous value and quality



Using a phased approach, starting with a 90 Day MVP, targeted implementation milestones deliver value early and often



Sprint 1

Data quality awareness



Sprint 3

Reltio ID, entities, and relationships configured



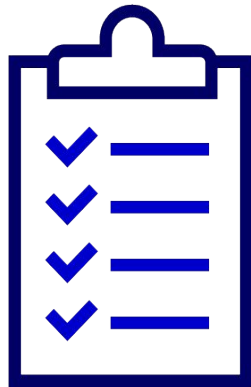
Sprint 5

Downstream consumption enabled

When sprinting, **Ready** comes before Set and Go

OUR MISSION

Prepare our Customers and Partners and share knowledge of what is needed to deliver the Reltio MDM solution successfully and achieve value fast



- ☐ Requirements documented
- ☐ Data profiling executed
- ☐ Data access confirmed
- ☐ Training completed
- ☐ Integration plan in place
- ☐ Security requirements finalized
- ☐ Resource needs confirmed

Value blockers

These common blockers delay implementation timelines and time to value

Access to Data

- Source system licensing issues
- No approval to load Production data in non Production environment
- Unknown masking requirements

Data Quality

- No ability to execute data profiling
- New source system requirements mid project that have not been profiled

Data Load Delay

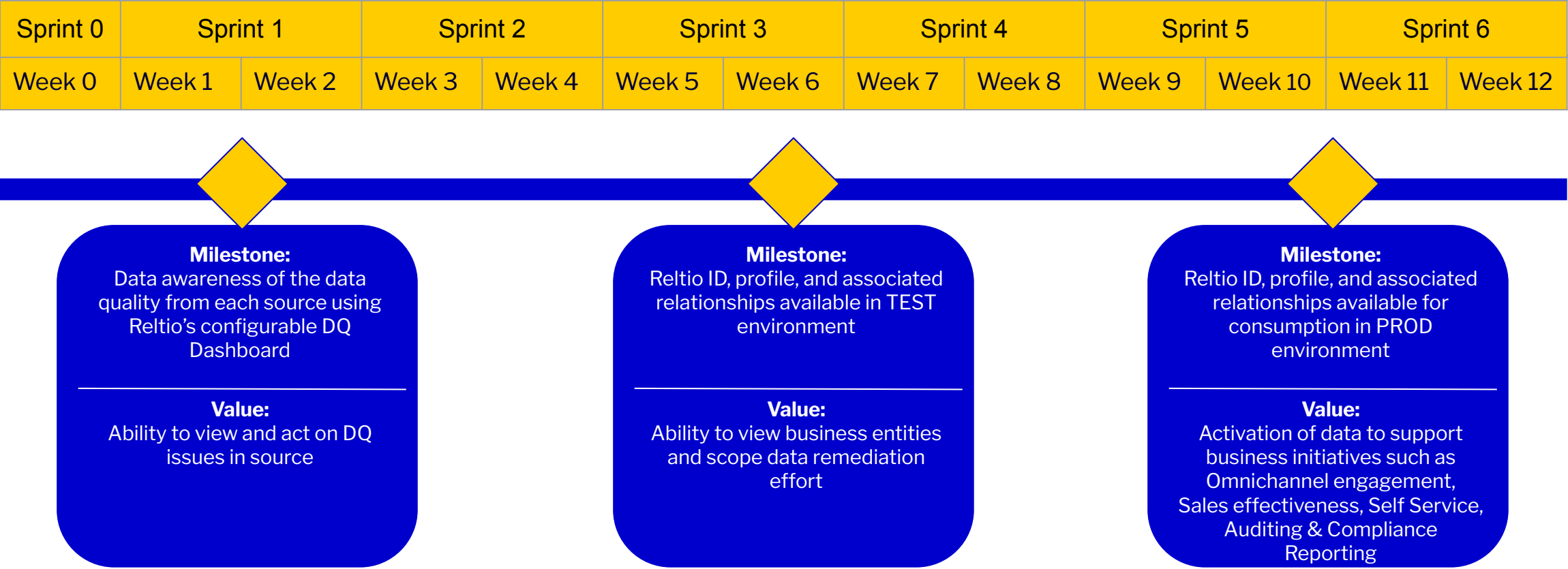
- No decision on integration or ETL tool
- Delays in ETL development

Customer Readiness

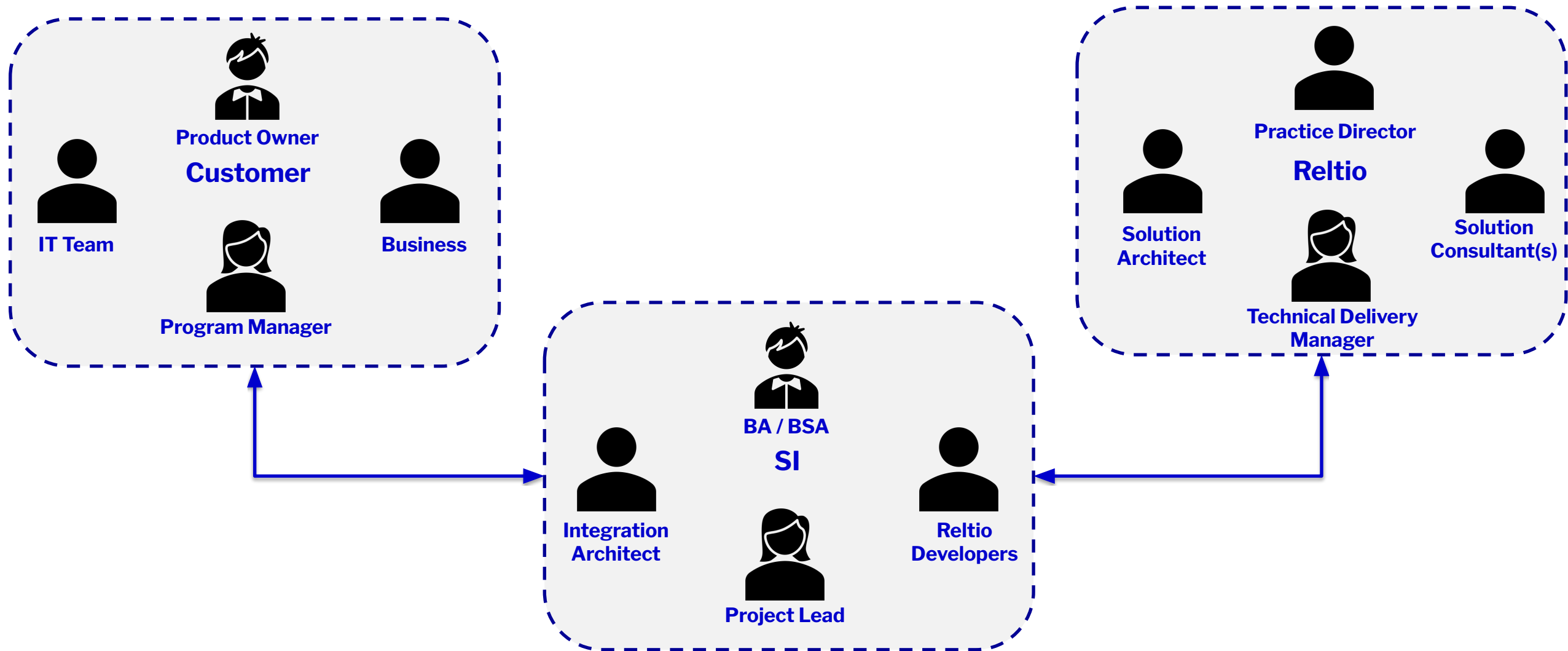
- Lack of documented requirements (functional, non functional, security, etc)
- Implementation resources not identified
- Lack of business owner support

The Reltio Way accelerates time to value

Reltio 90 Day MVP Timeline



Team Structure



Reltio Professional Services roles

Role	Responsibility	Skillset
Practice Director	<ul style="list-style-type: none"> Provide executive oversight and resolves conflicts, constraints and blockers Escalation point for Partners and Customers 	<ul style="list-style-type: none"> Cross-organizational & functional problem solving Scoping
Technical Delivery Manager	<ul style="list-style-type: none"> Leads technical implementation and success via The Reltio Way Delivery Methodology including management and best practices of Reltio activities and deliverables Proactively manage the project financials, scope, schedule, and status on ongoing basis 	<ul style="list-style-type: none"> MDM Principles Platform User
Solution Architect	<ul style="list-style-type: none"> Develop MDM solution architecture deliverables such as system context, integration diagram, data model, design specification and the implementation checklist Assist with creating and validating the fit-gap analysis document Review technical team deliverables for compliance with architecture standards and best practice 	<ul style="list-style-type: none"> MDM Principles Reltio Platform Configuration and Architecture
Technical Consultant	<ul style="list-style-type: none"> Execute assigned technical deliverables, document, and transfer knowledge accordingly Mentor Customer and Partner resources on technical approaches within best practices guidelines Collaborate with Project Team members (Reltio, SI, and Customer) to facilitate thorough technical understanding of the fit-gap analysis document 	<ul style="list-style-type: none"> Reltio Platform Configuration and Development JAVA Functions
Integration Consultant	<ul style="list-style-type: none"> A Technical Consultant focused specifically on Implementation of integration functionality – Reltio Integration Hub (RIH), Salesforce Connector, Dun & Bradstreet Connector, and leveraging PS built utilities 	<ul style="list-style-type: none"> Reltio Platform Configuration and Development Reltio API

Customer/Partner roles

Role	Responsibility	Estimated Time
Executive Sponsor	<ul style="list-style-type: none"> Assist with major issue resolution and resource allocation 	Up to 4 hours per week
Product Owner	<ul style="list-style-type: none"> Manage the product roadmap and the prioritization of the backlog Define the product vision based on understanding of the requirements and knowledge of the stakeholders business needs Support release management and cycle planning Manage stakeholders 	Up to 100% throughout the project
Team Lead / Scrum Master	<ul style="list-style-type: none"> Facilitate daily scrum and sprints effort Provide leadership and guidance to the team Manage and support effective communication among team members Support the Product Owner with backlog planning and prioritization 	Up to 100% throughout the project
Development Team Members (Developers, Designers, Testers)	<ul style="list-style-type: none"> Implement requirements into the product in an incremental manner including configuration/build, testing and remediation of issues Attend Reltio training Product and User Interface (UI) design Create overall testing plan, test scripts as well as execution of scripts 	Up to 100% throughout the project
Integrator	<ul style="list-style-type: none"> Support for integration activities between various solutions 	Up to 100% throughout the project, as required
Architect Owner (Enterprise)	<ul style="list-style-type: none"> Provide architectural vision Support planning and decision-making 	Up to 20% throughout the project, as required
Technical and Domain expert(s)	<ul style="list-style-type: none"> Provide business and technical subject matter expertise around data and business processes 	Up to 50% throughout the project, as required
Testing Team	<ul style="list-style-type: none"> Support the Scrum Team with testing execution Augments the Scrum Team and their test effort 	Up to 30% throughout the project

Questions

Thank You

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