

## Reltio Professional Services Implementation Checklist

[Customer Name]

[Date]

### Objective of the Implementation (required)

1. Please provide a brief statement describing the objective of this implementation
2. Describe the use cases for the mastered data
3. What is the value proposition of the implementation

### Domains to be mastered

|           |  |
|-----------|--|
| Domain #1 |  |
| Domain #2 |  |
| Domain #3 |  |
| Domain #4 |  |
| Domain #5 |  |

### Data Sources

| Question                                                                                      | Answer | Additional Detail (if necessary) |
|-----------------------------------------------------------------------------------------------|--------|----------------------------------|
| Number of Data Sources per domain                                                             |        |                                  |
| Expected number of records per source                                                         |        |                                  |
| Is the Data Dictionary (Entities / Attributes listing) available?<br>If so, please provide    |        |                                  |
| Ongoing load frequency & type<br>: Batch, real-time, or near real-time                        |        |                                  |
| Following the load into Reltio and mastering of the profiles / records, will mastered data be |        |                                  |

|                                                                                                                                                                                                                                                                                 |  |  |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|
| sent back to the source system(s)?                                                                                                                                                                                                                                              |  |  |
| <p>If YES to the above then,</p> <p>a) Does the source record have a Unique ID that will be sent to &amp; stored in Reltio and then used to send data back to source system?</p> <p>b) What type of data does the above apply to (e.g. Address/Location type data, others)?</p> |  |  |

## Data Volume

| Question                                                                                                                                                                                                                                                                                                          | Answer | Additional Detail (if necessary) |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|----------------------------------|
| Expected number of records to load into the MDM system (Initial and Ongoing)                                                                                                                                                                                                                                      |        |                                  |
| Expected number of consolidated records (following match / merge)                                                                                                                                                                                                                                                 |        |                                  |
| <p>Expected number of Interaction (transaction) records (if being loaded into Reltio)</p> <p><i>A <b>Transaction</b> or an <b>Interaction</b> stands for an event that occurs at a particular moment, such as, making a retail purchase, opening an email, opening a support case, or visiting a website.</i></p> |        |                                  |
| Type of hierarchies available and whether they would be                                                                                                                                                                                                                                                           |        |                                  |

|                                      |  |  |
|--------------------------------------|--|--|
| managed (created & edited) in Reltio |  |  |
|--------------------------------------|--|--|

## Known Business Rules

| Question           | Answer | Additional Detail (if necessary) |
|--------------------|--------|----------------------------------|
| Match Rules        |        |                                  |
| Survivorship Rules |        |                                  |
| Cleansing Rules    |        |                                  |

## Address Standardization and Verification

| Question                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Answer | Additional Detail (if necessary) |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|----------------------------------|
| Is Address Standardization and Verification applicable?                                                                                                                                                                                                                                                                                                                                                                                                                                            |        |                                  |
| What Countries will be standardized                                                                                                                                                                                                                                                                                                                                                                                                                                                                |        |                                  |
| <p>Is US's Coding Accuracy Support System (CASS) and/or Canada's Software Evaluation and Recognition Program (SERP) required?</p> <p><b>CASS</b> provides enables the United States Postal Service (USPS) to evaluate the accuracy of software that corrects and matches street addresses</p> <p><b>SERP</b> is Canada Post's Program that evaluates the ability of (commercially and internally-developed) third-party software to validate, correct, and provide correct Canadian addresses.</p> |        |                                  |

## Data Profiling

| Question                                                                | Answer | Additional Detail (if necessary)                                                                                                                                                                                                                                                                                                                                                                                 |
|-------------------------------------------------------------------------|--------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Has data profiling been completed and can it be shared?                 |        | Recommended data profiling metrics that contain the following for each source attribute : <ul style="list-style-type: none"> <li>○ Number of Unique values</li> <li>○ Number of Null values</li> <li>○ Type of the attribute (Number, Character, Boolean, Date)</li> <li>○ Max and Min length of each attribute.</li> <li>○ Average length of each attribute</li> <li>○ Modal (most frequent) values.</li> </ul> |
| Overall data quality - Items to note about data discovery done to date. |        |                                                                                                                                                                                                                                                                                                                                                                                                                  |

## UI

| Question                                              | Answer | Additional Detail (if necessary) |
|-------------------------------------------------------|--------|----------------------------------|
| Is localization beyond just English required?         |        |                                  |
| Are any known facet customization known at this time? |        |                                  |

## User Roles, Access Privileges, and Security

| Question                                                         | Answer | Additional Detail (if necessary) |
|------------------------------------------------------------------|--------|----------------------------------|
| Type of roles needed (examples - Data Stewards, Read only, etc.) |        |                                  |

|                                                                                                                                                                                                                                                                                     |  |  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|
| Data access by country, region, or any other specific requirement.                                                                                                                                                                                                                  |  |  |
| Is SSO Required? If so, please provide specifics on Identity Provider and current setup<br><br><i>Support for OAuth2 and SAML and for the following Identity providers (IdPs) PingFederate, Google Apps, GitHub, Active Directory Federation Services, and Okta Single Sign-On.</i> |  |  |
|                                                                                                                                                                                                                                                                                     |  |  |

## Workflow

| Question                                                                                                                                                           | Answer | Additional Detail (if necessary) |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|----------------------------------|
| Is workflow required? Only the following is supported as OOTB (Potential Match, Profile Delete, DCR). If additional is required, see below question.               |        |                                  |
| Is customized workflow required?<br><br><i>For example, Reltio DCR is a single step approval DCR. A customization would be to enable a multi-step approval DCR</i> |        |                                  |

## Integration

| Question                                                   | Answer | Additional Detail (if necessary) |
|------------------------------------------------------------|--------|----------------------------------|
| Number of downstream (consuming) systems to integrate with |        |                                  |
| Requirement for Batch vs. near real-time vs. real-time     |        |                                  |

|                                                                                                                                                                                                                                                                                                                                                                                              |  |  |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|
| Integration Platform and ETL tools currently in use at Customer that might be leveraged. Will these tools be used for loading data into Reltio as well?                                                                                                                                                                                                                                      |  |  |
| <p>Is Reltio Integration Hub (RIH) use in consideration? If so, what Use Cases?</p> <p><i>RIH is a well-designed, deeply-analyzed solution to the business challenges of managing point-to-point connectors, siloed data sources, and lengthy integration projects.</i></p> <p><i>It provides a no-code, low-code integration capability through the Reltio connected data platform.</i></p> |  |  |

## Extracts

| Question                                                            | Answer | Additional Detail (if necessary) |
|---------------------------------------------------------------------|--------|----------------------------------|
| Are extracts required                                               |        |                                  |
| Will the extracts need to be the crosswalk values or golden record? |        |                                  |
| Do the extracts need to be delta, full files, or both?              |        |                                  |

## Connectors

| Question                                                                                                                                                                                                                                                                                                                                                                                                                            | Answer | Additional Detail (if necessary) |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|----------------------------------|
| <p>Are any connectors required?<br/>Available connectors are:</p> <ul style="list-style-type: none"> <li>- SFDC Connector (bi-directional data synchronization for Account &amp; Contacts)</li> <li>- D&amp;B Connector for Account data enrichment with Dun &amp; Bradstreet Data</li> <li>- BvD Connector for Account data enrichment with Bureau van Dijk Data</li> <li>- MuleSoft Connector for integration purposes</li> </ul> |        |                                  |
| <p>If SFDC connector is required, will the consuming system be Veeva?</p> <p><i>Veeva CRM is used in Life Science organizations</i></p>                                                                                                                                                                                                                                                                                             |        |                                  |

## Data Enrichment

| Question                                                                                  | Answer | Additional Detail (if necessary) |
|-------------------------------------------------------------------------------------------|--------|----------------------------------|
| Are any third party data sets in scope to consume?                                        |        |                                  |
| What is the frequency of the updates that will be required from the third party?          |        |                                  |
| What is the method for getting the updates: batch or real time (includes near real time)? |        |                                  |

## RDM

| Question                                                         | Answer | Additional Detail (if necessary) |
|------------------------------------------------------------------|--------|----------------------------------|
| Is Reference Data Management (RDM) part of the solution?         |        |                                  |
| If yes, what use cases are in scope?                             |        |                                  |
| If so, what look-up type attributes and values will be mastered? |        |                                  |
| What are the anticipated volumes (both attribute and values)?    |        |                                  |

## Customization

| Question                                                                                                                             | Answer | Additional Detail (if necessary) |
|--------------------------------------------------------------------------------------------------------------------------------------|--------|----------------------------------|
| Are there any Life Cycle Actions (LCA's) required in the solution?                                                                   |        |                                  |
| <i>LCAs are Java extensions developed to perform a specific function such as populating an attribute based on a defined criteria</i> |        |                                  |
| Additional custom coding required?                                                                                                   |        |                                  |