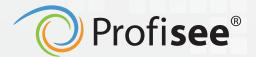


Master Data Management Software

Master Data Maestro

Master Data Services
Microsoft SQL Server



**Profisee** is a master data management software company focused on delivering enterprise-grade MDM capabilities through its Master Data Maestro software suite.

Master data consists of the information that is key to the core operation of a business. Master data may include data about people (customers, employees, vendors), places (branches, stores, cost/revenue centers), and things (products, contracts, accounts, assets). Master data also defines relationships between objects, such as reporting hierarchies, rollups or bill of materials, which provide the context of how data is derived and viewed within an organization.

Creating and maintaining an authoritative view of an organization's master data is paramount to delivering successful data management strategies in today's environment of myriad data sources, data sharing across multiple systems and user groups, and mergers and acquisitions driving a global footprint.

Profisee was formed from the management team of Stratature, the leading MDM software provider acquired by Microsoft in 2007. Profisee is a Microsoft Gold ISV (independent software vendor) partner, a member of the exclusive Microsoft MDS ISV program, and was named "Cool Vendor in MDM" in 2011 by a leading industry analyst firm.

With a strong heritage in master data management, Profisee is uniquely positioned to help customers build a solid foundation and successful path to reach their master data management goals.

The company

Profisee—
Master Data Done Right.

The software

Master Data Maestro—
Always Enterprise-Grade.

# Why Profisee?

Because it's not just about the technology. It's about relationships, commitment to the customer, and delivering on promises.

...And, yes, it's also about the technology.

## Customer commitment

At Profisee, the company foundation is solid and dependable. The sole technology focus is on MDM and the company focus is on the customer. From company founders to sales, consultants to

support, the R&D team and everyone in between: customer success is the priority.

Profisee is different. Customer support isn't just a department; it's a philosophy. If you've never had your questions answered by a Chief Technology Officer, Product Manager, or a Software Developer, then your business is with the wrong company. The Maestro consulting and support teams will not rest until you've delivered on your MDM vision.

### Unparalleled expertise

Without a doubt, Profisee's success is based on its people and their combined experience with master data management.

Profisee consultants come from the trenches of the MDM field and their real-world experience directly molds Master Data Maestro's development. Profisee's founders each have more than 25 years of hands-on experience, cementing a solid body of knowledge that spans the entire spectrum of MDM solution sets, technologies and industries. Our consultants and management team have written the book on Microsoft-based MDM solutions. Literally. The Profisee team has authored books, written the Microsoft MDS training curriculum, published the online MDM University, and evolved its own Agile MDM methodology.

# Ability to deliver

Profisee maintains a laser focus on MDM. Every line of code is focused on specific, real-world MDM use cases.

Regardless of requirements, scope and scale, Profisee delivers top quality MDM

solutions: From SMBs to the Fortune 50, departmental analytical MDM to enterprise-wide, operational MDM: Profisee has successfully crafted every type of MDM application across a wide range of verticals and domains.

Profisee's confidence in delivering on promises is rooted in a marriage of technology, resident experts, and customer service. Master Data Maestro and Microsoft SQL Server are a solid technology team you can trust to ensure your success. Profisee's methodology is simple: plan holistically and implement incrementally. This approach provides a firm grasp on your project scope and functionality, while the Profisee team ensures deliverables are aligned with defined requirement objectives.

### Proven track record

Profisee's founders, its senior R&D team, its support team, and many of its consultants have worked together for over twelve years. At Stratature, Profisee's predecessor, this same team

helped define the MDM market from its initial inception, worked through a successful Microsoft acquisition, and grew into Profisee in 2007, bringing along a loyal international customer base.

For most companies, well-rounded knowledge capital is hard to attain: it comes only from experience, and experience comes only with time. By encapsulating this experience into the Maestro suite, Industry Models, packaged services, and numerous case studies, we ensure our proven track record becomes your proven track record.

# Multi-Domain MDM Platform

ONE Platform. ONE Product. ONE Investment. ONE Skills Set. ANY Domain. ANY Data. ANY Source. ANY Destination. UNLIMITED MDM Success.

With Profisee's Master Data Maestro suite, leverage the world's lowest priced MDM base platform delivered by Microsoft as part of SQL Server. Imagine all the size, scale, resources, and strength of Microsoft, dovetailed with laser-focused MDM expertise from Profisee.

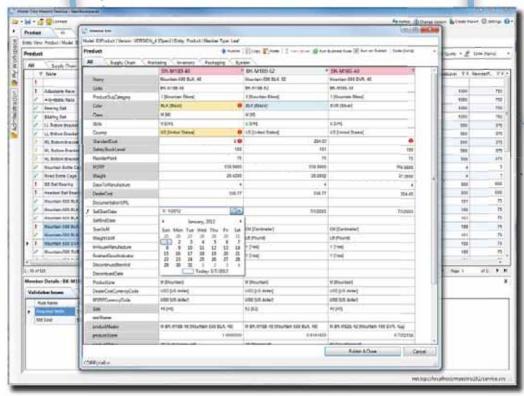
The result is a seamlessly combined, enterprisegrade MDM platform. Whether tackling simple

analytical MDM, or an enterprise-wide, operational MDM solution for tens of millions of customer records – build your first domain application with the confidence that every moment and dollar spent is an investment in your next domain. The next domain. And the next domain.

Master Data Done Right.

#### True Multi-Domain Platform

Detecting a false multi-domain platform is easy. Is it a single technology stack delivered in a single install for every domain you could ever implement? Is there a single license fee that covers every MDM application you could ever build? If not, you've found an imposter. Of course with Master Data Maestro the answers are an unequivocal, resounding "YES".



#### Architecture

Master Data Maestro is built with a serviceoriented architecture and delivers tremendous built-in capability. The Software Development Kit (SDK) exposes capabilities as services and incorporates the services from Microsoft MDS. Advanced security is tied to Active Directory, yet specific to the MDM task. Maestro seamlessly integrates Reporting Services without breaking services architecture compliance. With one-click install and update, Maestro simultaneously removes the limitation of thin client technology for advanced users and addresses deployment update concerns. Server processes are threaded and optimized for large, complex tasks. Whatever your architecture criteria, Master Data Maestro checks all the boxes.

#### Personalization & Stewardship

At the heart of any MDM application is a small group of Subject Matter Experts. These SMEs are the very foundation of data management and governance, driving the success of an application. No other product matches Master Data Maestro's out-of-the-box capabilities for the data steward because Profisee understands that the success of any MDM initiative relies on highly productive stewards. Master Data Maestro houses expertly designed user interfaces for managing any task: profiling, business rules, security, filtering, personalization, matching and survivorship, reporting, and production operations.

### Collaboration

Second only to the core SME group is a broad group of business users. These users are often contributors or subscribers to your company's data who need well-designed workflow steps to facilitate their participation. The Master Data Maestro SDK enables you to create custom applications for these users that save valuable company time and provide quality control checks on your data from the point of creation. Through the Maestro SDK, leverage your existing security provisions for custom, web-based workflows and applications.

#### Business Rules & Data Quality

The Microsoft Master Data Services platform contains a strong, built-in business rules engine. To maximize power output from this feature, Master Data Maestro ties stewardship and workflow into the rules engine for a single integrated business process. Maestro is the world's leading provider of comprehensive address and contact data quality services by region on a fixed-price basis. All these features are delivered as part of a single, integrated out-of-the-box capability set without extensive development and testing cycles. Less risk. More productivity. Higher satisfaction.

#### Reporting, Transparency & Audit

Reporting, done right, is difficult and expensive, often requiring extensive custom Web services. For these reasons, many vendors completely ignore reporting. Master Data Maestro supports one-click, services-based report creation directly from any Maestro view. A growing Report Library supplies valuable reports out-of-the-box to use with any MDM application. View and report metadata, business rules, security maps, as well as product catalogs and charts of account. Finally, enjoy comprehensive transparency with full support for audit and transaction logs. With Maestro, it's one click only. Always.

# Golden Record Management

Clean ➤ Match ➤ Master ➤ Harmonize

Successful Golden Record Management depends on clean data, better matching, better user experience & scalability.

Successful Golden Record Management is all about best in class. Maestro is a refreshingly simple solution to complex enterprise data problems. Despite the increasingly noisy master data management software market, Maestro stands out in power, capability, simplicity, and price.

Profisee puts functionality in the box: matching, deduplication, mastering, and record harmonization are

just a few of the powerful features that come standard with Maestro Golden Record Management.

Whether tackling simple hierarchy creation for a data warehouse as part of an analytical MDM application, or managing tens of millions of customer or product records as part of an operational MDM system, Master Data Maestro quickly and easily provides the best Golden Records possible.

#### Maestro Data Quality

Embrace the very best in address and contact data quality services built directly into the Maestro platform. Maestro supports batch and ad-hoc cleansing without expensive external ETL, Web services implementation, or transaction fees. Out-of-the-box data quality services contain everything you need, including services connectivity, process management, user interfaces, scorecards, and reports. Maestro Golden Record Management is the complete package.

#### Matching

Profisee revolutionized matching for master data applications. Maestro's fuzzy logic algorithm is built from scratch specifically for MDM. The matching engine enables customizable matching strategies that execute quickly. Most importantly, it is built into the Maestro Server for Golden Record and de-duplication use cases. Based on a dedicated multi-year research project, the engine works with any entity, any set of attributes, and can be layered to support complex scenarios. With many successful implementations for customer, person, product, chart of accounts, and cost centers, Maestro's matching engine is the ultimate solution for Golden Record initiatives.

#### Data Quality Partnerships

Profisee partners with world-leading providers to offer data services for more than 80 countries. Unlike many other data vendors and online marketplaces, Profisee went to extraordinary lengths to provide unlimited data packages for Maestro customers. There is no weak link in Maestro data quality services. Each partnership is carefully leveraged for its unique value to achieve the very best in data quality.

Address, Name, Email, and Telephone verification and standardization are all available on a fixed-cost basis across all the master data domains, records, and countries you need.



#### Mastering & Harmonization

Mastering is the process of taking disparate records to create the optimal Golden Record. Defined rules and processes determine which attributes of matched records from multiple sources are used to create the master "Golden Record".

Harmonization is the complimentary process of pushing data from a Golden Record back out to source records for ultimate operational MDM capability. Maestro contains powerful built-in tools that utilize mastering and harmonization to manage any model and any domain.

#### Enterprise-Grade Capability

With so many products touting matching and de-duplication, it can be challenging to sort out the real contenders for enterprise-grade solutions from the myriad personal productivity tools. One look at a Master Data Maestro demonstration and it is obvious that our "Always Enterprise-Grade" tag line is well earned. From robust production management capabilities, to tested hardware configurations for large scale GRM, Master Data Maestro is your single platform solution for Golden Record Management.



# Important Investment Considerations

Focus on fixing costs without limiting your data or your application options.

A platform should be priced like a platform.

Master Data Maestro is more than equipped to tackle high-volume data initiatives. Selecting an MDM product that meets all technical requirements is only half the battle. For most MDM software providers, return on investment, time to value, and project risk are huge challenges. A cursory analysis of a price quote from another MDM vendor will quickly reveal variable costs and material future license fees.

Profisee is different. Really different.

Profisee is focused on making its customers' lives easier. Pricing packages are distilled to make sizing and planning an MDM investment a simple choice of processing power. Pick your hardware scale and leave everything else up to us.

Fixed Price. Unlimited Data. Unlimited Services. A truly customer-centric MDM platform.

#### Price

Calculating ROI for your MDM solution is all about cost-benefit analysis. While most MDM vendors make calculating costs a major project in itself, pricing your Maestro solution is easy. Other vendors charge per-record and per-domain, making total cost a moving target. Factor in industry standard per-record fees for data quality and MDM becomes a major variable cost headache. Avoid the hassle with Master Data Maestro's fixed price.

#### The Microsoft Factor

Many companies do not realize their existing investment in Microsoft SQL Server means that they already own Microsoft Master Data Services licenses. With Master Data Maestro, unlock the latent potential of your SQL Server investment.

SQL Server 2012 marks the second major release of Master Data Services and demonstrates Microsoft's ongoing commitment to MDM. Profisee is proud to be a Microsoft Gold ISV partner, and as such, honors a commitment to dovetail with Microsoft's technology and roadmap.

#### Time to Value

What ever happened to plain old-fashioned out-of-the-box value? Services architecture, ETL, and EAI are not synonymous with productivity; neither are 20-step use cases within an enterprise service bus necessarily progressive. Master Data Maestro envelops all the latest architecture, but it works differently. With Maestro, minimize complexity and implementation effort while maximizing return. With Profisee's top quality services and technology, deploy your MDM solution in record time.



#### **Industry Models**

Nothing demonstrates Profisee's knowledge of your business like Maestro's dedicated Industry Models. These Industry Models are crafted from Profisee's extensive real-world experience and collaboration with professional associations in your industry. Maestro Industry Models provide the fastest, lowest risk method for implementing MDM applications. Use an entire Industry Model as a springboard, or carefully select individual entities to complement your existing data modeling structure, or leverage Maestro's ERwin integration for easy pick-and-mix custom modeling.

#### Packaged Services

Profisee is a full-service MDM provider that can assume turn-key responsibility for any MDM project. The most popular strategy with our customers is an implementation partnership. A joint team of our consultants and technical support experts combine with your IT and business personnel to craft your own MDM Center of Excellence. Self-sufficiency is the key metric for future success. Our packaged services are formulated specifically to ensure you receive the optimal services and skills at just the right time in your project.

#### Scalable Enterprise-Grade Solution

The Master Data Maestro platform scales to suit any enterprise. Whether supporting a single model with a thousand records, or a robust entity with tens of millions of records, enterprise-grade Master Data Maestro is your trusted, scalable platform. Using Microsoft's Fast Track Reference Architecture, Profisee and Microsoft have evolved an MDM specific version of this strongly proven architecture to deliver optimal performance to any MDM project and application.

#### Risk Summary

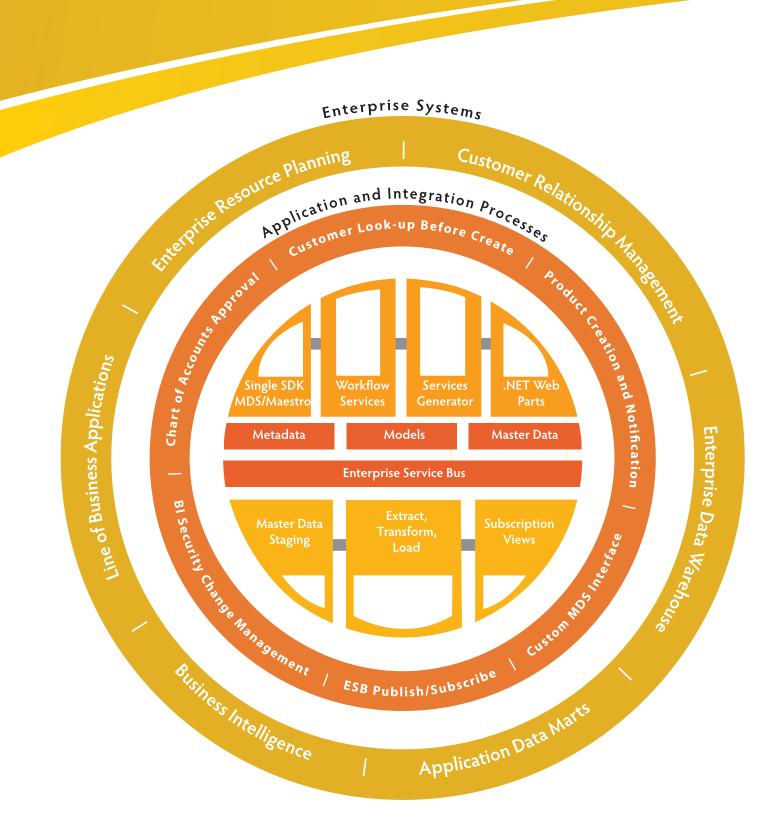
In many cases, the current economic climate combined with missed deadlines and poor project delivery on prior large technology investments drives a very real need to manage project risk. Price, time to value, leveraging existing software investments, industry models, packaged services, and an excellent scalable architecture are all key drivers for a risk-managed investment decision. There is no better approach to MDM than Profisee's Master Data Maestro running on Microsoft SQL Server.

# Application Integration

With Profisee's advanced Software Development Kit...

Make your custom application development experience better in every way.

Faster deployments. Less risk.



# Software Development Kit

#### Customer Focused

Profisee is focused exclusively on helping customers deliver MDM solutions. Integrating an MDM solution into an enterprise is as much about business process as it is about technology. Profisee's SDK encapsulates the technical details of MDS' Web services, making it substantially easier to integrate enterprise systems. You deliver value more quickly by focusing on business processes, while Profisee continues to extend the SDK to meet new requirements.

### Services Generator

#### Point-Click

Maestro Web Services Generator (WSG) is the cornerstone component of Maestro's SDK. A point-click interface distills the scale and complexity of an enterprise MDM model down to the key entities and service calls you need for your application.

#### Forms & Workflow

#### Advanced Workflow

Microsoft MDS supports simple attribute based workflows tied to Active Directory and MDS security. When sophisticated enterprisegrade workflows are required, a more robust platform is necessary. The Maestro SDK provides a library of workflow templates and forms based on Windows Workflow Foundation, and designed to integrate with SharePoint and other enterprise applications.

#### A Single API

Master Data Maestro provides a single API for developers to leverage when developing custom solutions. It wraps the MDS Web services API, and exposes functionality used in Maestro. This makes life easier for application developers and integration specialists. By providing a single, simplified API for development, developers are more productive, can focus on the business problem, and fully leverage Profisee's collective knowledge of MDS.

#### Strongly Typed

After using simple point-click selections to pick the entities and service calls required, the WSG creates a Generated Services Library (GSL). This library leverages the Maestro API and includes strongly typed Web services and objects, making development quick and easy.

#### Task Focused Web Interfaces

The SDK contains a library of NET Web Parts that support data stewardship tasks. Include these in Web applications or SharePoint in a fraction of the time. Need to create a new Account? Need to check for a preexisting Customer to avoid duplication? Maestro SDK makes custom apps easy.

#### Faster Performance

In specific cases, Profisee has tuned Master Data Maestro to increase performance of certain MDS Web services calls to improve productivity. Calls such EntityMembersGet may be used literally tens of thousands of times a day. Or even in an hour. Every marginal increase in performance directly translates into better application and integration performance for your company.

#### Simplicity is Faster

Strongly typed services mean less code, less testing, less maintenance, less risk, and much faster delivery. Profisee thought of everything.

#### Collaboration & Integration

Use the SDK's services for custom application development and integration. Support grid or chart based analysis, workflows, and real-time integration into operational applications. Integrate master data models and processes to an enterprise service bus, or simply provide a vital point-to-point services connection.

# Project Management Methodology

Agile for Master Data Management.

Profisee's proven methodology ensures rapid and continuous stream of Master Data Management solutions to your business.

### Assess

- Identify opportunities
- · Prioritize goals

Goal

Benefits & Deliverables

- Define success criteria
- Evaluate environment
- Assess technology options
- Domain assessments
- · Release roadmap
- · Initial product backlog
- · Staffing & teaming plan
- Reference architecture
- Risk mitigation plan
- Financial cost forecast

#### Release & Sprint Planning

- Refine & prioritize backlog
- Confirm requirements
- · Clarify acceptance criteria
- Secure resources
- Review & adjust processes
- Revised product backlog
- Agreed iteration deliverables
- Draft model designs
- · Work estimates
- · Iteration work plan
- · Recalibrated cost forecast
- Team adjustments

### **Sprint Execution**

- · Refine & build models
- · Revise business rules
- · Stage & load models
- · Monitor performance/scalability
- Resolve defects
- Advanced models
- Refined ETL processes
- Purified integration services
- Enhanced data migration support
- Overhauled data dictionary
- · Revised design artifacts



### **Continuous Improvement**

- · Assess quality & fit-for-purpose
- Evaluate deployment readiness
- Evaluate business readiness
- Review & refine processes
- Adjust resources
- · Review schedules & budgets
- Deployable models
- System-wide integration components
- Migration/upgrade capabilities
- Organized model documentation
- Revised project metrics
- Refined process documentation

### **Quality Control**

- · Establish acceptance criteria
- · Monitor performance/scalability
- Confirm defect resolution
- · Engage business users
- Elicit & track feedback

#### Loaded working models

- Refined integration points
- Updated defect log
- Updated product backlog
- Revised risk log

#### Strategic Planning

Profisee's consulting services provide the business and technology leadership for the successful development and adoption of an enterprise MDM strategy. Our methodology focuses on early and regular delivery of tangible business value, along with continuous improvements in business and data management processes.

#### Tactical Execution

The age of 18-month IT projects is gone. Business leaders demand on-time solutions delivery in order to stay competitive. Profisee's methodology focuses on a long-term vision, delivering that vision in increments the business can use now—not next year.

## Deploy

- Uninterrupted productivity
- Deployment risk mitigation
- Business readiness
- Responsiveness to business needs
- · Deployment plan & schedule
- Certified production environment
- Implemented application
- Post-implementation support

### Continuous Account Management

- Independent trusted advisor
- · Quarterly discussions on business challenges and potential solutions
- Periodic review of application capabilities and performance
- Review existing data assets to maximize ROI & standardization—data warehouse, MDM & ERP repositories
- · Updates on evolving industry best-practices, vendor roadmaps, and new releases of technology
- · Leveraging existing technologies already licensed

#### **Education Services**

- Shorten ramp-up period
- Informed application acceptance
- Skills transfer
- · Avoid common pitfalls
- Class room curriculums
- Hands-on exercises
- Full product documentation
- Practical experience with your
  data
- · Early working proof-of-concept

### Project Management

- Budget and schedule optimization
- Effective communication
- Deliver value quickly and continuously
- Managed change control
- Agile for MDM methodology
- Coordination of product backlog
- · Backlog definition & grooming
- · Weekly status reporting
- Daily stand-ups with core team

#### **Support Services**

- · Maximize up-time
- Consistent issue reporting process
- Expert guidance
- Consistent system performance
- Sustained customer satisfaction
- · Help desk support line
- Online product documentation
- Advanced support as needed

# **Consulting Services**

A fresh approach to engagements.

Build your own master data Center of Excellence.

Profisee's services framework assists organizations with the successful design, implementation, deployment, and ongoing enhancement of any master data management solution. With a flexible engagement approach, Profisee's methodology ensures the optimal level of service to help you reach your business goals, regardless of project scale and resources.

#### Two Ways to Engage

Profisee's services methodology provides two paths of engagement to meet the specific needs of your organization with services that progress as your MDM capabilities mature.

#### Master Data Coaching

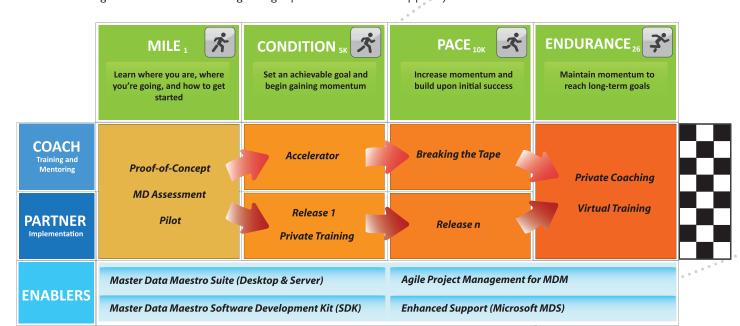
For organizations that have committed to MDM and formed dedicated MDM and Governance teams, Master Data Coaching from Profisee will grow those resources to get your MDM solution deployed quickly. The focus of this path is on skills transfer, best-practices, and guidance, allowing you to quickly build an independent MDM function. Continuing support is Profisee's specialty. Entrust the protracted success of your MDM initiatives to our team with confidence.

#### Master Data Partner

When you need to get an MDM solution into production quickly with limited internal resources while managing risk, Profisee will partner with your organization and provide a turn-key solution. After providing the initial solution, Profisee will transfer the knowledge and skills necessary for your internal resources to take long-term ownership of the solution. As always, Profisee will follow through with any long-term guidance you need to ensure your success.

#### Ongoing Support

Whether it is baseline support of Profisee's Maestro suite, or enhanced support to include coverage for SQL Server MDS, Profisee will be there to solve issues as you encounter them. With enhanced support, you gain the comfort of having a single point of contact to support your entire MDM environment.



# Service Packages

Ensure rapid deliverables with a tangible ROI.

Profisee's service packages offer a "no risk" approach to service engagements. Packages provide a defined scope, documented deliverables, measurable milestones, and rapid turn-around—all at a fixed price. With Profisee, avoid the all too common scenario of missed deadlines, blown budgets, and disappointed stakeholders.

Each of Profisee's four service packages provides rapid delivery of superior services without the unknown, by leveraging their deep-seated experience and investment in repeatable processes. Quickly progress projects, eliminate "open-ended" consulting agreements, and push to production faster that you ever imagined possible.

### Assessment

For customers seeking a new solution based on specific business requirements, Profisee's Assessment consulting service delivers expert guidance on closing the process and technology gap between your current and desired analytics and MDM strategies. This is a strategic first step to rapidly delivering a best-in-class solution that directly addresses the specific needs and requirements of your business. The Assessment will facilitate the initial components of a wellplanned MDM initiative: defining the business requirements, technical environment, and scope of the initiative, as well as identifying opportunities, anticipating process and technical challenges, and determining success criteria. Deliverables include a recommended technical design and agile-based project plan developed specifically for your company.

# Breaking the Tape

Breaking the Tape is a continuation of Profisee's industry-leading Accelerator approach for getting started with master data management. It continues Profisee's focus on mentoring and knowledge transfer by guiding your MDM team through the process of taking the Accelerator across the finish line and into production. Engagements are tailored to meet the specific needs of your organization and based on mutual understanding gained through the Accelerator.

### Accelerator

The quickest, easiest, and most cost effective way to get started with MDM is with Profisee's Master Data (MD) Accelerator.

The key value proposition of our MD Accelerator is intense classroom training followed by immediate deployment of newly gained skills on an initial application, using your corporate data. This approach teaches and demonstrates best-practice concepts and serves as the foundation for a production application.

After tackling an initial master data domain, your team has established its credentials as the nucleus of your MDM Center of Excellence.

# Private Coaching

Profisee's Private Coaching service provides a guiding hand, keeping your MDM projects ontrack as your organization develops knowledge of your MDM platform and processes. This includes oversight of requirements definition, solution architecture and design, data modeling, data integration, data governance, and project management. Ultimately, Private Coaching furthers your self-sufficiency while instilling lessons learned and best-practices for data management.





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Gold Independent Software Vendor (ISV)

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