



CASE STUDY

Master Data Management for Compliance

Customer Case Study - A Healthcare Manufacturing Firm



Business Need

The company had a global supply chain with multiple Systems of Entry (SOE) for clients or contacts. With the growing number of compliance restrictions globally, there was a need to aggregate the contacts in MDM to track Opt-In and Opt-Out centrally. The initial use case was for North America (US and CAN) to have their compliance metrics centralized.



Customer Challenges

- Compliance requirements differed by country, and even amongst states in the US
- Data fields for compliance were not standardized across systems
- Systems did not communicate down or upstream about opt-out preferences



Solution Provided

- Syntelli worked to aggregate all compliance metrics needed as well as all data sources required.
- Rules were set up based on country codes (Opt-In method required for CAN, most recent Opt-In and Opt-Out tracked for US).
- Fields were added to track new fields in source systems moving forward for compliance (Opt-In DTM, Opt-In Method, Opt-In Source, Opt-Out DTM, Opt-Out Method, Opt-Out Source, Forget Me Request Y/N, Forget Me DTM, Forget Me Method, Forget Me Source, Forget Me Push Sent Y/N, Forget Confirmation Y/N).
- Profisee was used as the register for marketing compliance. MDM was not the System of Entry (SOE) but was the compliance system of record.



Impact of Solution

Using Profisee as the system of record for compliance, allowed the client to track communication preferences in one place and push requests to systems that do not have fields for communication preferences (ex. Opt-Out phone). This allowed the client to be able to meet their compliance requirements for US and Canada.



Technology Used

- Profisee