



20 Oct 2026

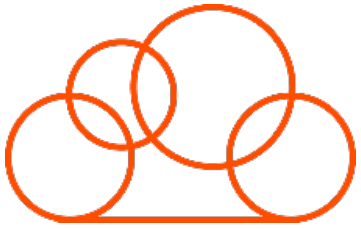
From Golden Record to Agentic Action: Unlocking Data 360 with Trusted Context-MDM

Kamal Abrol, Senior Success Architect

Housekeeping Tips



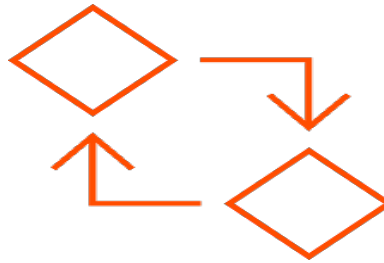
- Today's session is scheduled for **1 hour** and will feature a presentation followed by a Q&A session at the end.
- To ensure a smooth presentation without interruptions, all participants will be muted.
- Please submit your questions to "All Panelists" using the **Q&A panel**. We look forward to answering them during the live Q&A.
- This session is **being recorded**. The recording and slide deck will be available on our **Success Portal**, and a recorded link will be emailed to you after the event.
- We value your input! Please take a moment to complete the **post-webinar survey** to share your feedback and suggest future topics.



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Product Learning
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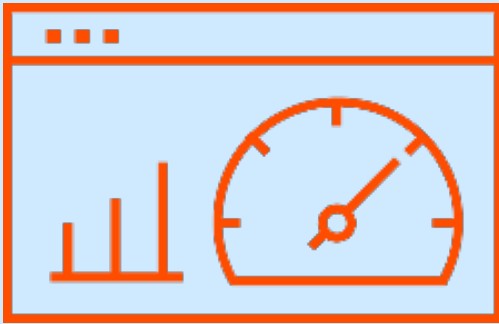


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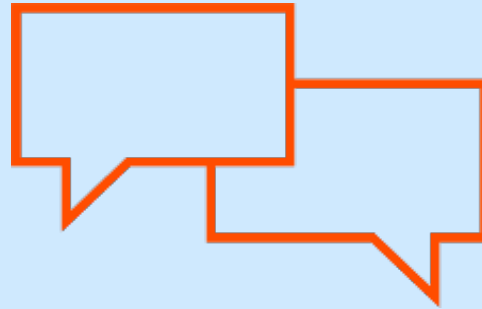
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More Information



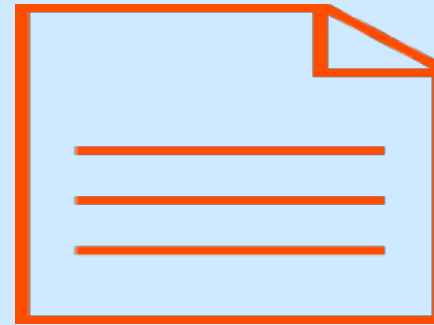
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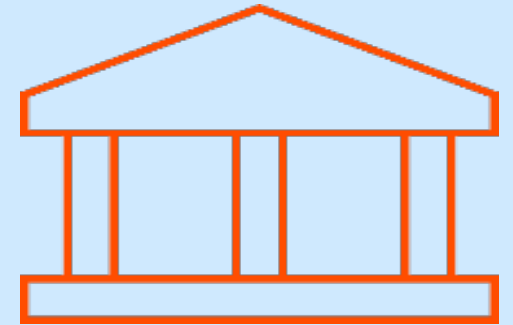
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Today's Agenda:

The Challenge — Disconnected master data and engagement data

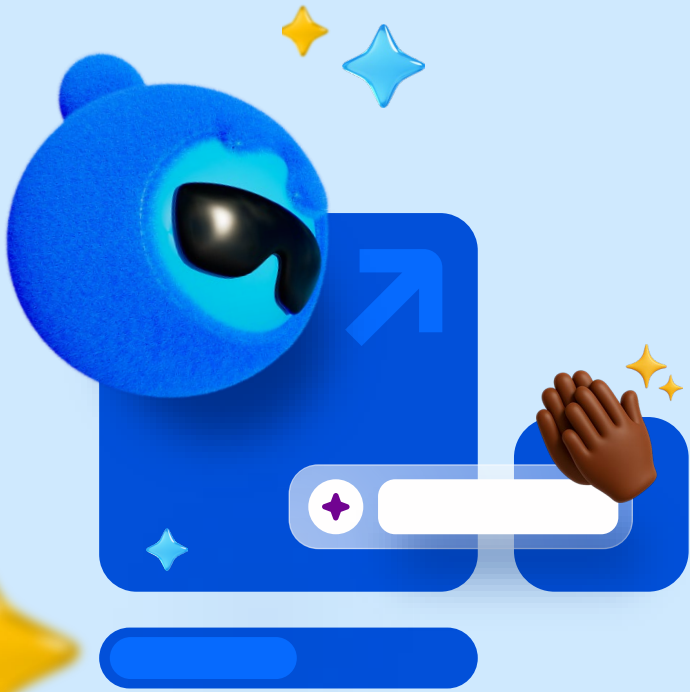
Unlocking Data 360 with MDM — Architecture and key distinctions

How It Works — Publishing via Ingestion API · CDI mappings · Taskflows

Identity Resolution Deep Dive — MDM match outcomes · AI-based matching

Demo — Configure · Publish · Enrich profiles · Enable segmentation

Agentic Enterprise Use Cases — Personalization and actionable AI insights



The Challenge

Disconnected master data
and engagement data

The Challenge: Fragmented Data

No Single Source of Truth

1

Same account: “gold” in one division’s CRM, “unknown prospect” in another — no arbiter of which is correct

Acquisition Sprawl

2

Enterprises that grew via M&A have no unified customer view — every acquired BU runs its own identity scheme

Engagement Data Silos

3

Sales Cloud, Service Cloud, Commerce, Snowflake, AWS — each holds a fragment of the same customer’s story

No Corporate Family Tree

4

Subsidiary signals can’t roll up to parent — whitespace opportunity and account health invisible at the corporate level

Identity Resolution Impossible

5

Cross-platform matching fails without a trusted anchor — engagement events cannot be stitched to the right profile

The Compounding Result

6

Master data (who the customer IS) and engagement data (what they DO) remain permanently disconnected silos

The Cost of Disconnection

REVENUE LEAKAGE

Sales pitches net-new business to existing loyal customers — wasted effort, damaged trust, and needless discount pressure

FRAGMENTED OUTREACH

Duplicate outreach, ignored past learnings — no unified cross-channel engagement history means every rep starts from zero

NO ACCOUNT HEALTH SCORE

No rolled-up account health score → impossible to prioritize at-risk accounts or surface early churn signals

BLIND ABM

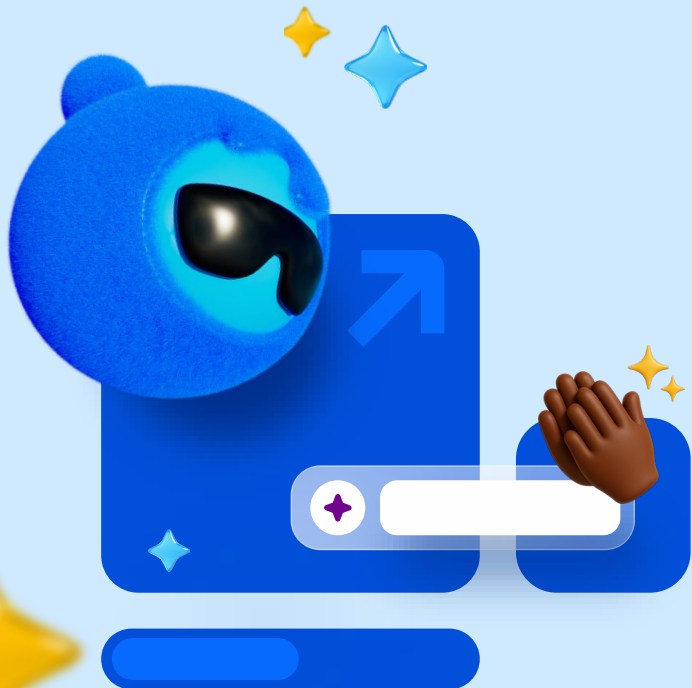
Marketing runs ABM without seeing the corporate family tree — subsidiary signals invisible, parent-level targets missed

HIDDEN WHITESPACE

Cross-sell and expansion opportunities buried across divisions — revenue left on the table because no one can see the full account

RISKY AI OUTPUTS

AI agents operating on fragmented data → inconsistent, unreliable outputs. Agentforce is only as trustworthy as the data it's grounded on



MDM or Data 360 ?

Unlocking Data 360 with MDM



Myth 1

MDM & Data 360 are competing products.
I have to choose one.

These products solve different problems for different buyers in the same organization.
It's not either/or.

MDM is an authoritative source used for compliance and enterprise-wide “golden records,” while Data 360 handles multiple versions of profiles for real-time activation. Together they're the data foundation for agentic AI.





Myth 2

If a customer buys Data 360, they don't need MDM.

They do different jobs. MDM creates the governed system of record across every domain — customer, supplier, product, location — resolving one trusted version of each and syncing it back so billing, ERP, and CRM all agree. Data 360 unifies engagement, anonymous, and unstructured data for real-time front-office activation.

They're built for different tasks.





Myth 3

Data 360 is a replacement for MDM.



Data 360 is not an MDM replacement. It activates trusted data for segmentation, personalization, and data-driven workflows.

Data 360 can consume master data as a source to drive governed data across Salesforce apps and Agentforce that consume it.



Listen for the Problem — Then Map to the Right Solution

Start With Customer Requirements

“Our customer records are duplicated across SAP and Salesforce. Finance and Sales can't agree on the same customer.”

Authoritative record problem — multiple systems claiming different truths for the same entity.



“We need to generate real time marketing campaigns for segments of customers, personalizing it based on buying signals.”

Activation issue - resolving identity and behavioral data across structured and unstructured sources, including Salesforce apps and data lakes, to power segmentation and personalization.



Data 360

“We want to send personalized health reminders to our patients — but if we get the patient or the clinical detail wrong, that's a serious clinical and compliance failure, not just a bad campaign.”

This customer needs both — MDM for the golden record as a foundation + Data 360 to wrap it with real-time customer insights and engagement.



MDM

+



Data 360

The Solution: Trusted Context

“Informatica MDM serves as the trusted foundation, creating and governing Golden Records. Data 360 serves as the activation engine, overlaying real-time engagement signals for personalization, segmentation, and AI-driven workflows. Together: Trusted Context.”

Informatica MDM — System of Truth

- Governs & validates golden records
- Generates physical golden IDs
- Pushes golden IDs back to legacy systems (billing, ERP, warehouse)

Salesforce Data 360 — System of Reference

- Virtual, flexible cross-reference layer
- Links & activates without overwriting source
- Does NOT write cross-references back to legacy

MDM governs what a record IS · Data 360 reveals what a customer DOES and WILL DO

Why One Cannot Replace the Other

MDM alone X

- Cannot process millions of web events/sec or real-time clickstreams
- Cannot trigger push notification within milliseconds (IoT low-battery alert)
- Cannot run credit card fraud detection at sub-second latency
- Cannot track anonymous device IDs, browser cookies, stitch them on login

Data 360 alone X

- Cannot fix duplicate records in billing, ERP, or warehouse source systems
- Cannot push golden IDs back to legacy databases (no durable source-level cross-refs)
- Cannot govern master data for supply chain, manufacturing, or finance
- Cannot permanently resolve "John has 5 account numbers across 5 legacy systems"

	Unified Profile (Data 360)	Golden Record (MDM)
Source data	Retained intact — all sources independent, lineage preserved	Overwritten with survivorship winner
Value selection	Does NOT pick a 'best' value — keeps all	Survivorship rules pick best per attribute
Identifier	Unified ID can change (key ring splits/merges)	Master ID is permanent

MDM vs. Data 360: John Smith

3 interactions: (1) buys jacket in-store — john.smith@email.com, 123 Main St (2) browses anonymously — Cookie XYZ987, views running shoes (3) logs into app — jsmith123@email.com, 123 Main Street, buys shoes

MDM — Permanent Golden Record (back-office)

- Ignores Interaction 2 — anonymous cookies lack verified identity attributes
- Postal standardization: 123 Main St = 123 Main Street → match
- Survivorship: keep most-recent email → jsmith123@email.com
- Result: Golden Record CUST_99944 pushed to ERP & billing
- One financial invoice at the standardized address ✓

Data 360 — Real-Time Identity Graph (front-office)

- Ingests ALL 3 interactions — including Cookie XYZ987 + running shoe behavior
- Graph: Record A (john.smith@) · Record B (Cookie) · Record C (jsmith123@)
- On login: links Cookie to jsmith123@; probabilistic match via address + name
- Result: Graph Cluster GRAPH_CLUSTER_ABC — all data intact, connected
- Within milliseconds: home screen banner → discount on running socks ✓

What MDM Contributes: The Golden Record

Entities published to Data 360

- CustomerOrganization — corporate hierarchy, D&B enrichment, parent/child
- CustomerPerson — validated individual + full contact point superset
- Relationships — affiliations, org membership, corporate family tree
- Source ID links (XrefLinks) — maps every source system ID to the golden record

What makes a record "authoritative"

- Validated Identity: DUNS numbers, tax IDs, regulatory identifiers
- Trust Scores: each source ranked per attribute (SAP more reliable than CRM for billing)

MDM governs 5 enterprise domains

Domain	Examples
Customer	Legal entities, individuals, account hierarchies
Product	SKUs, catalog, PIM validation & lineage
Supplier	Vendor onboarding, compliance, contracts
Employee	HR records, org structures, entitlements
Location	Validated addresses, geographies, facilities

What Data 360 Contributes: The Activation Engine

[1 CONNECT] 270+ connectors · batch + streaming · real-time <500ms · zero copy (Snowflake, Redshift) — 108 new zero-copy sources in latest release (AWS, Stripe, Oracle, IBM, Eloqua, GitHub)

[2 HARMONIZE] Identity resolution · deduplication · DLO→DMO mapping · system of reference — does not overwrite source data

[3 GOVERN] Policy-based governance · AI tagging · encryption at rest & in transit

[4 ENRICH] CLV, propensity scores, bring-your-own models (SageMaker) · Vector DB built in — semantic search, embeddings, RAG for Agentforce · Agent Memory (continuity across sessions) · Intelligent Tagging (affinities, intent signals, journey stage)

[5 ACTIVATE] Salesforce apps (Sales/Service/Marketing) · Agentforce (RAG + hybrid search) · Tableau · Ad platforms · Third-party apps

MDM is about Authoritative Truth — Not just Deduplication

MDM establishes the single, legally & operationally authoritative version of a business entity — so your entire enterprise agrees on the same truth.

Customer

Legal entities, individuals, account hierarchies

Product

SKUs, catalog, PIM validation and lineage

Supplier

Vendor onboarding, compliance, contracts

Employee

HR records, org structures, entitlements

Location

Validated addresses, geographies, facilities

What Makes a Record "Authoritative" in MDM

- **Validated Identity:** Records are verified against legal entities, not just de-duplicated. Think DUNS numbers, tax IDs, regulatory identifiers.
- **Governed by Trust Scores:** Each source system is ranked for each attribute. MDM knows that SAP is more reliable for billing than Salesforce — and applies that automatically.
- **Workflow-Enforced Quality:** Data stewards review exceptions. New supplier records don't go live without approval. Changes are tracked with full audit lineage.
- **Hierarchies & Relationships:** Parent-child legal structures, account-to-contact relationships, multi-domain links — MDM models them all.
- **Enterprise-Wide Consistency:** Once a golden record is published, every downstream system — CRM, ERP, analytics, supply chain — operates on the same truth.

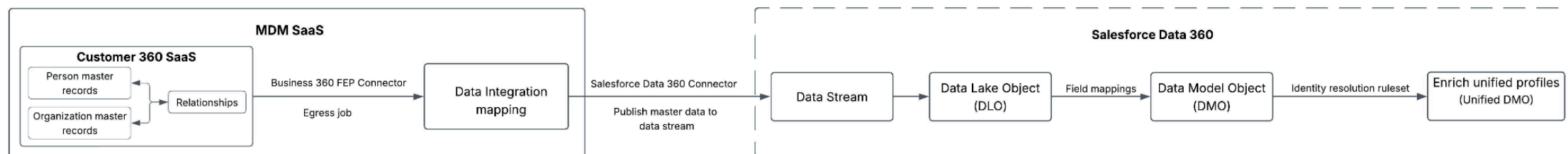
Architecture: MDM + Data 360

Informatica MDM (Customer 360 SaaS)

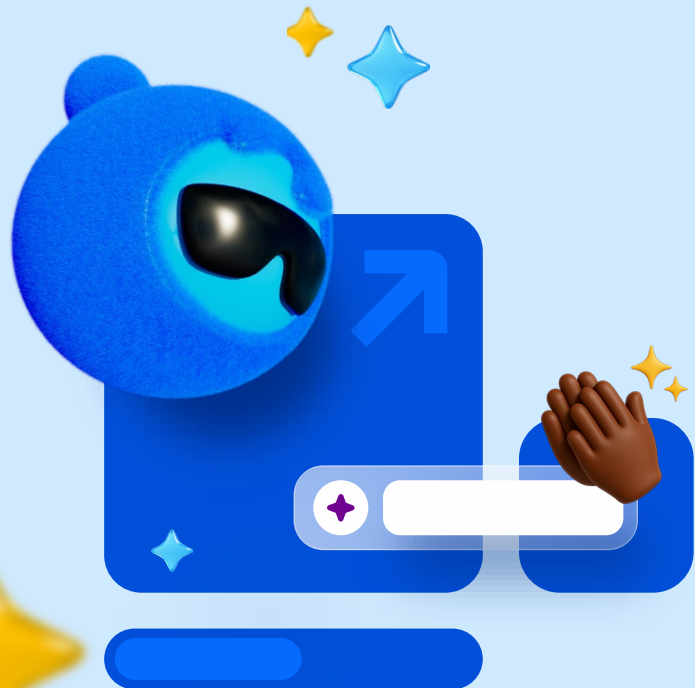
- Creates & governs golden records — Organization, Person, Hierarchies
- 3rd-party enrichment (D&B firmographic data)
- Multi-domain: Customer, Product, Supplier, Employee, Location
- Pushes golden IDs back to legacy source systems
- Publishes via Egress Jobs → Business 360 FEP Connector

Salesforce Data 360

- Activation engine — enriches with real-time engagement signals
- 270+ connectors · real-time <500ms · zero copy
- Identity resolution · segmentation · calculated insights
- Activates to: Marketing, Sales, Service Cloud, Agentforce
- Does NOT push cross-references back to legacy databases



MDM → Data 360 (unidirectional default) | MDM → legacy source systems (golden ID write-back) | Data 360 → activation destinations

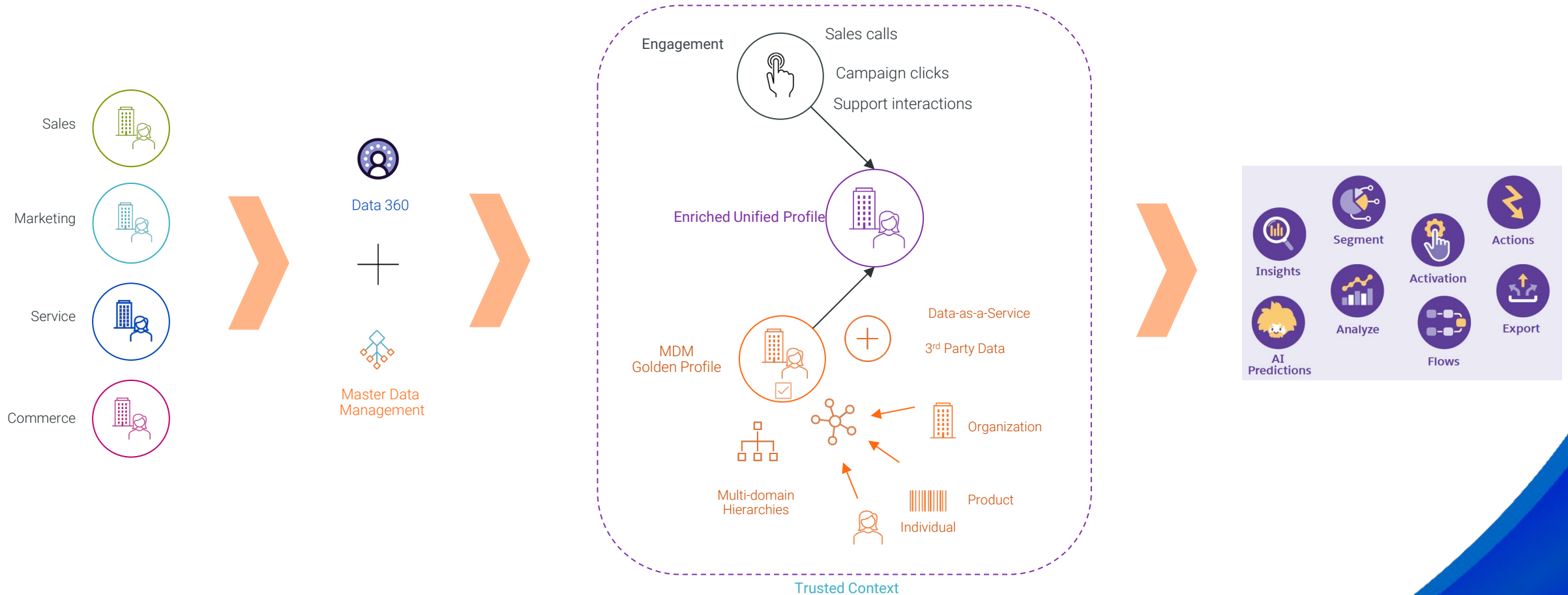


How It Works

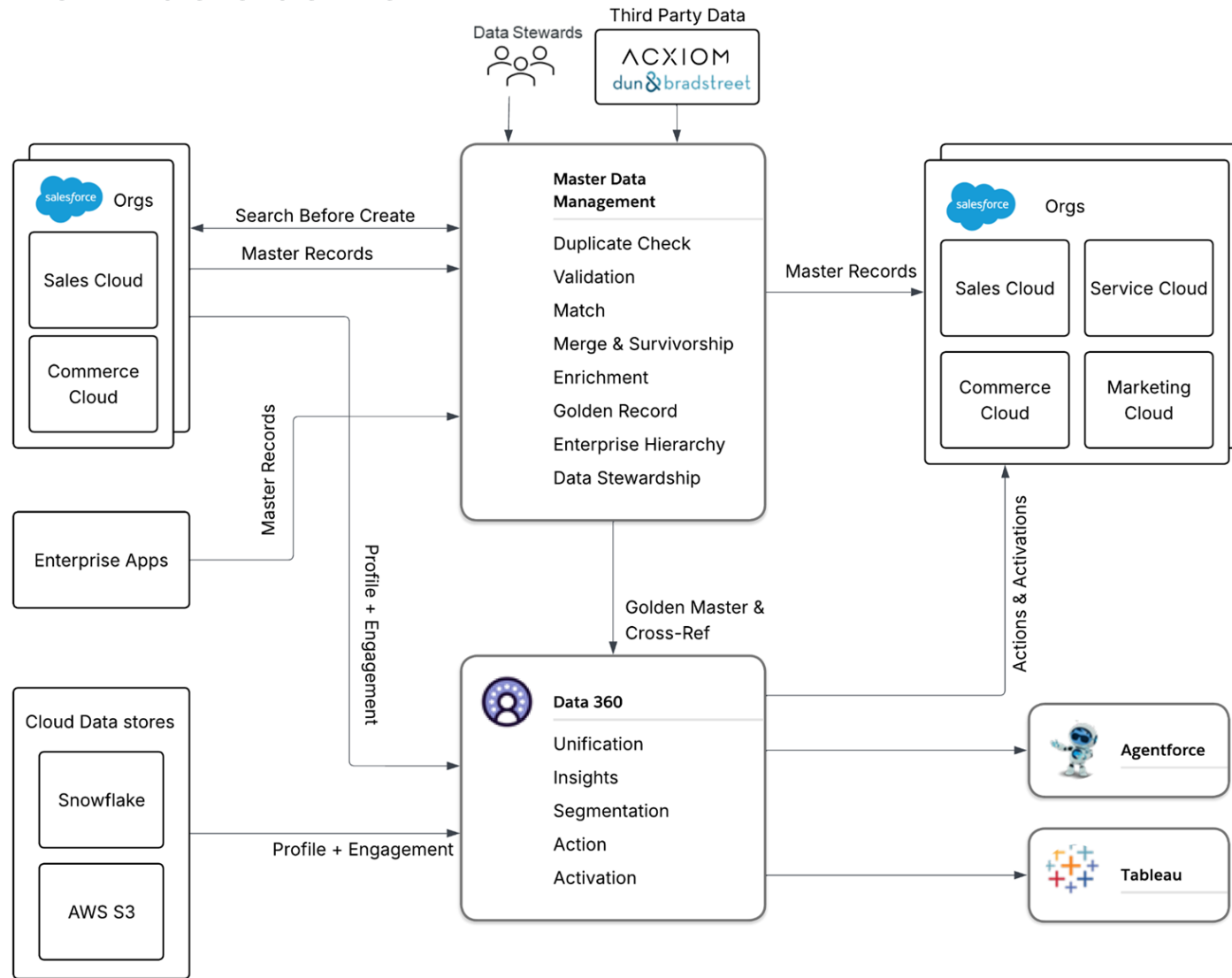
Publishing via Ingestion API
· CDI mappings · Taskflows ·
MDM jobs

Data 360 + MDM

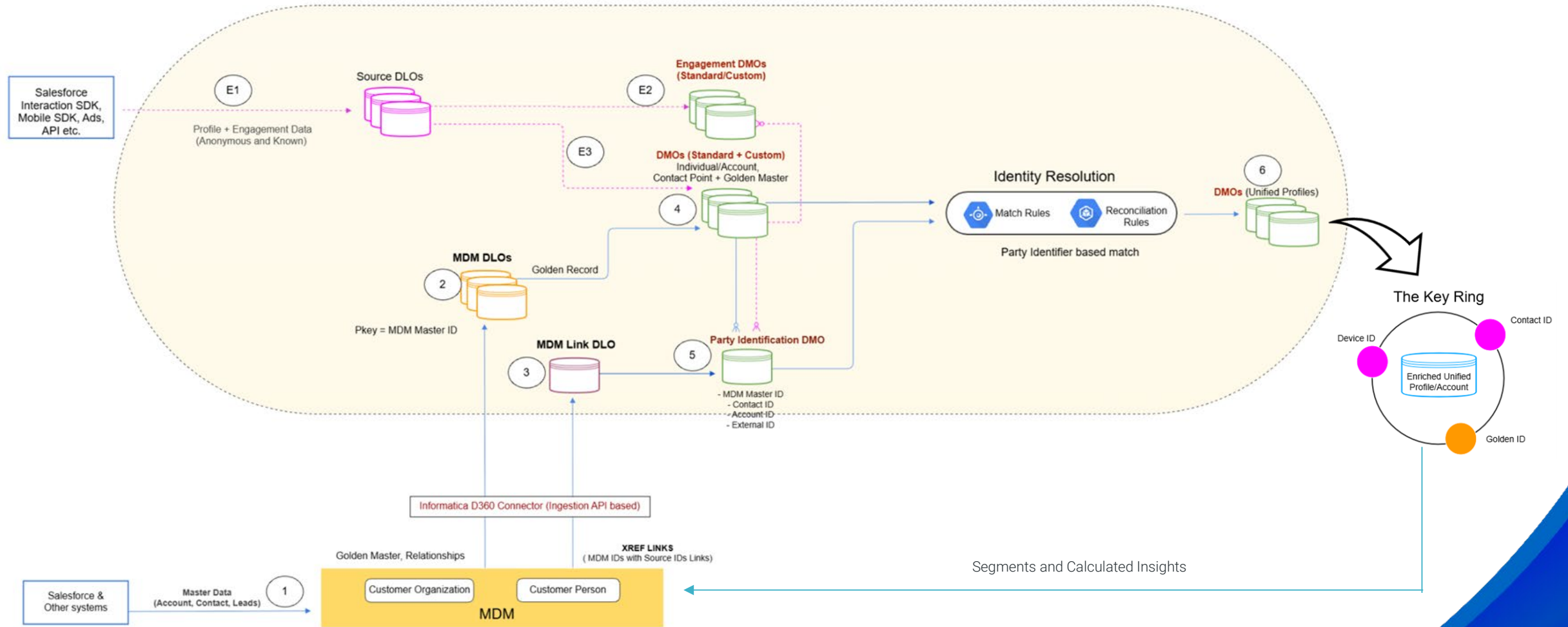
Instant activation of golden profiles through segmentation, calculated Insights



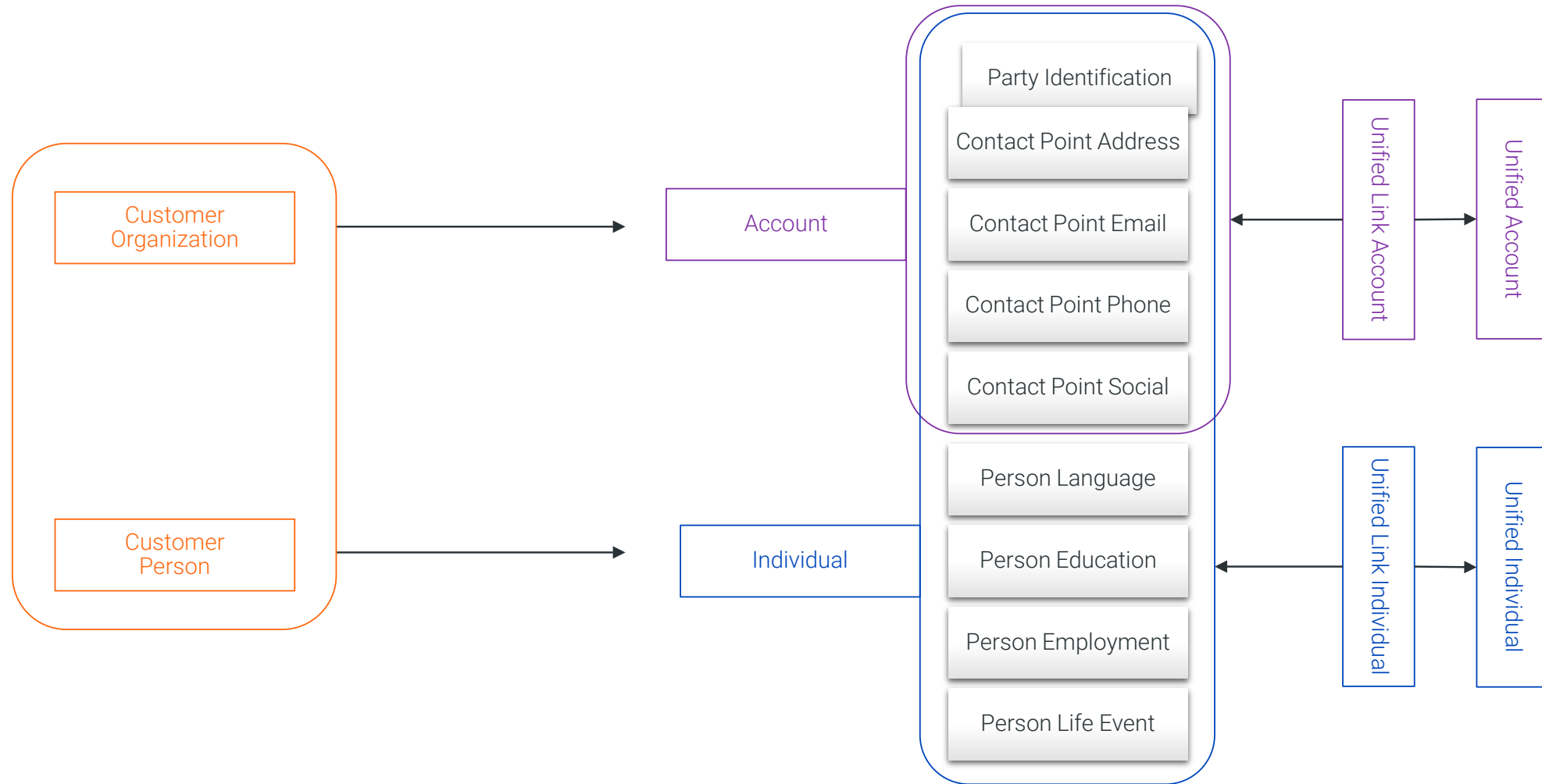
Solution Architecture



Integrated Dataflow



Data Model Alignment - Customer 360



Data Model Alignment — No Rebuild Required

Organization field groups → Target DMO

Field Group	Target DMO
General (Name, Industry, Employees, Website)	Account
Address	Contact Point Address
Email	Contact Point Email
Phone	Contact Point Phone
Social Media	Contact Point Social
Identification	Party Identification
Key People	Key People (custom DMO)
Financial	Party Financial Info (custom)
Indicator	Party Indicator (custom)
Status	Party Status (custom)
Stock	Org Stock Info (custom)
Alternate Name	Account Name (custom)

Entity → Unified Objects

MDM Entity	Customer 360 Objects
CustomerOrganization	Account, Unified Account, Unified Link Account
CustomerPerson	Individual, Unified Individual, Unified Link Individual
Party Identification	Party Identification DMO
Contact Points	Address / Email / Phone / Social DMOs

Datakit components:

- Data stream bundles · DLOs · DMOs
- Data mappings (DLO field → DMO attribute)
- Identity resolution rulesets

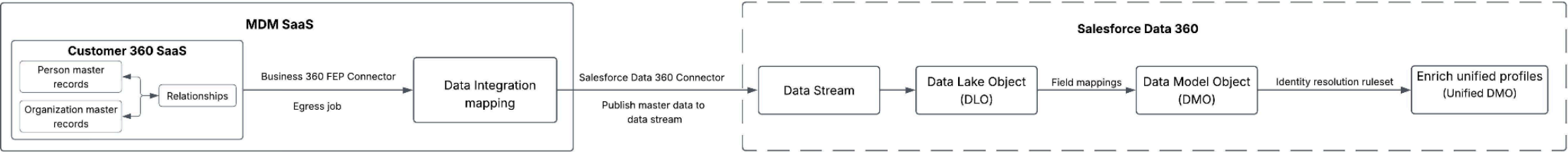
Publishing: MDM → Data 360 via Ingestion API

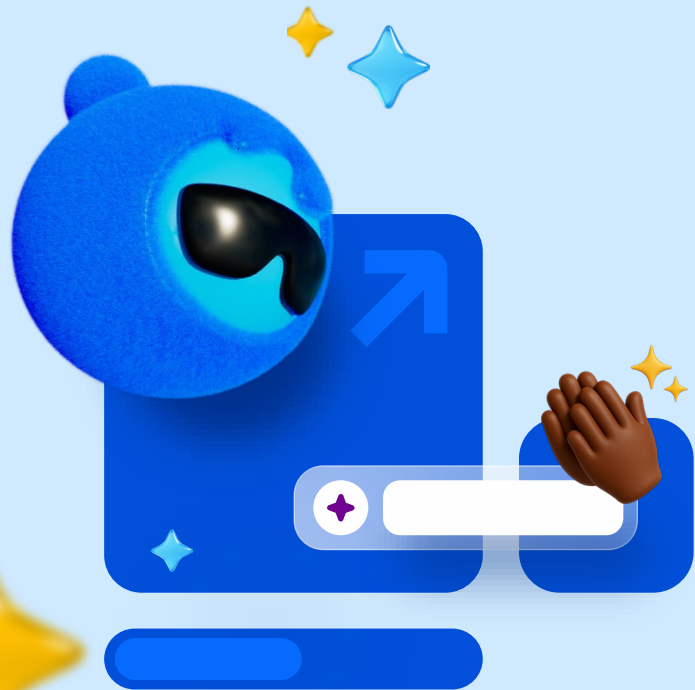
B360 FEP Connector → Data Integration Taskflow → SF Data 360 Connector → Ingestion API → Data Stream → DLO → Field Mappings → DMO → Identity Resolution → Enriched Profiles

3 predefined batch jobs — Oct 2026 release:

Job	Exports	Target Data Stream
infac360datacloud_egress_customer_org_load_dlo	Organization master records	MDM_C360_Account
infac360datacloud_egress_customer_person_load_dlo	Person master records	MDM_C360_Individual
infac360datacloud_egress_customer_xreflink_load_dlo	Source primary keys (Org + Person)	XrefLink data streams

Ingestion API ingests streams → DLOs (physical staging) → preconfigured field mappings populate DMOs (semantic layer) → identity resolution rulesets build enriched unified profiles





Identity Resolution Deep Dive

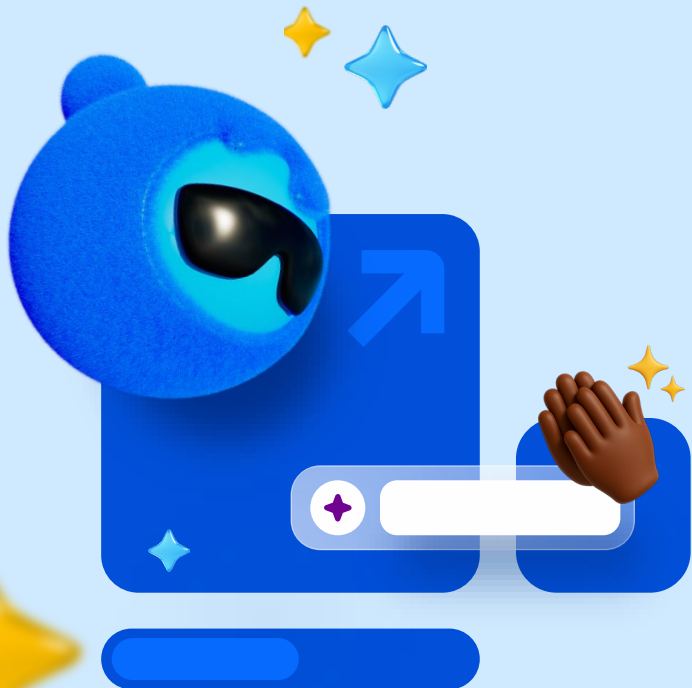
Customer 360 SaaS match outcomes in
Data 360 · AI-based matching

Identity Resolution: MDM Match Outcomes in Data 360

- MDM match outcomes drive Data 360 IR — Customer 360 SaaS match results and source record links are ingested via XrefLink jobs, anchoring Data 360 identity resolution to verified golden profiles
- Unified Individual ID — dynamic key ring linking all source records; splits and merges as data changes — IDs are not static
- New engagement records (web sessions, campaign clicks, support tickets) are identity-resolved against existing MDM golden profiles on ingestion
- MDM eliminates back-office duplicates; Data 360 resolves cross-channel engagement identity against that clean foundation

AI-Based Matching for New Users

- Existing users: continue with current match configurations — no disruption
- New users: AI-based matching gets you started quickly — no configurations to build from scratch
- Reduces implementation time and improves data quality at the source

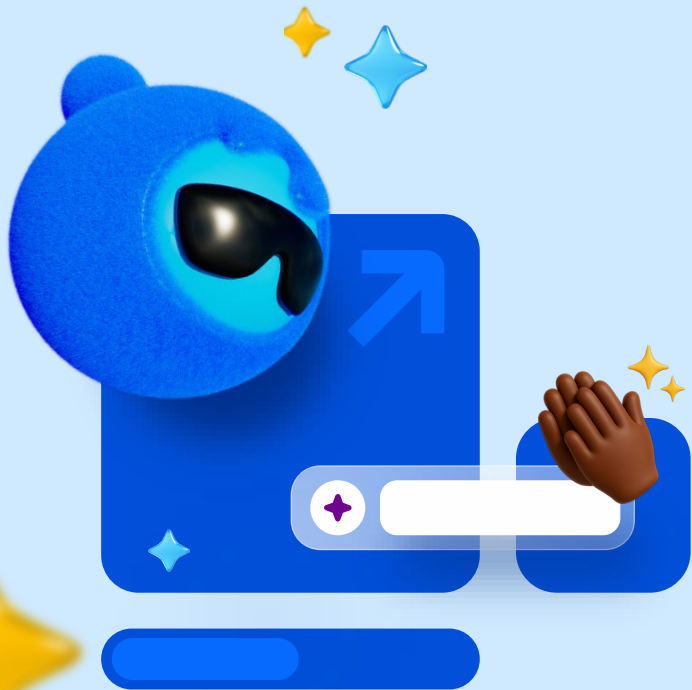


Demo

End-to-end: configure extension ·
publish master records · enrich profiles ·
enable segmentation

Vision: Alex at OmniTech — TechNova Holdings

1. TechNova Holdings in Sales Cloud → MDM golden profile (multi-source lineage view), multi-level B2B corporate hierarchy, D&B enrichment, Data 360 account health score
2. Whitespace analysis: European subsidiary = heavy OmniCloud user · zero OmniShield entitlements or open opportunities
3. Unified engagement timeline: EU contacts attended cybersecurity webinar (AWS S3) · clicked marketing emails (Marketing Cloud) · OmniCloud telemetry high (Snowflake zero copy)
4. Automated activation: Add 'OmniShield' product interest → Data Cloud segment auto-refreshes → activates to Marketing Cloud → OmniShield nurture journey enrolled
5. Manual activation: Personalized cross-sell pitch to webinar attendees; Sam (Marketing Ops) coordinates nurture journey in Marketing Cloud



Real-World: MDM + Data 360 in Action

Real-World: MDM + Data 360 in Action

Worldwide FMCG Leader — 200+ markets, 50M+ profiles

- Challenge: Unify consumer identity across 200+ markets — loyalty, purchase signals, engagement
- MDM: Master consumer data governance — deduplication, enrichment, quality at scale
- Data 360: Unified 50M+ consumer profiles into a single trusted identity
- MuleSoft: Real-time data fabric connecting loyalty, e-commerce, retail
- Agentforce: Activated segmented audiences — loyalty, trade promotions, personalized offers

Salesforce Customer Zero — Legal entity governance

- Challenge: Salesforce accounts did not represent legal entities → tax compliance risk, billing inaccuracy
- MDM: Enterprise Account Master — Golden Records for legal entities with persistent IDs, standardized hierarchies, D&B enrichment
- Data 360: Activated mastered legal entities in Salesforce, linked to account, tax, and billing workflows
- MuleSoft: Enterprise APIs for near real-time sync to downstream systems
- Tableau: Trusted legal entity and financial reporting for Finance & Revenue teams

Engagement Signals: The Full Picture

All signals unified against the MDM golden profile as the trusted anchor identity — powered by XrefLinks

[Sales Cloud] Calls, emails, calendar events, activities

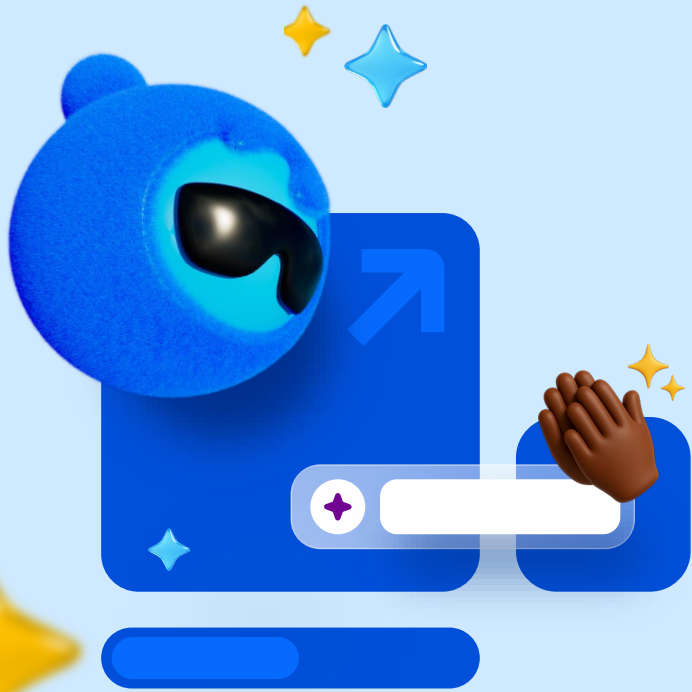
[Marketing Cloud] Page visits, email opens/clicks, form submissions, campaign engagements

[Service Cloud] Live chat, SMS, WhatsApp, phone calls, knowledge base interactions, call transcripts

[Snowflake] Product usage telemetry — zero copy federation (no ETL, no data duplication)

[AWS S3] Third-party webinar attendance data — batch ingestion from external data lake

Without the MDM XrefLinks, these five systems would have 5 different John Smith IDs — impossible to stitch together.



Agentic Enterprise Use Cases

Personalization and actionable insights
powered by trusted MDM

Data 360 Real-Time Use Cases with MDM- *the trusted identity anchor*

The MDM golden record is the trusted identity anchor — all of these break down without governed master data

Area	Without Real-Time Data 360	With Real-Time Data 360
Service	Stale data → longer resolution times, lower satisfaction	Latest interactions always available → faster resolutions
Commerce	Outdated recommendations → missed revenue	Instant interaction analysis → real-time recommendations → higher conversions
Marketing	Static segments → ineffective targeting, poor ROI	Dynamic segments triggered on real-time interactions → higher engagement
Website	Same content for every visitor → lower engagement	User profiles drive dynamic web content in real time → increased loyalty
Profile Sharing	Inconsistent profiles in-store / mobile / service → fragmented CX	Identity resolved across channels → consistent Customer 360 profile everywhere

Agentforce Use Cases Powered by Data 360

Data 360 unified profiles + MDM golden records = trusted context for every AI agent action

Function	AI Use Case	Business Value
Sales	Automated prospecting agent — creates pipeline, qualifies leads, books meetings on behalf of seller	Boost revenue
Sales	AI forecasting guidance — predicts end-of-period close based on pipeline signals	Forecast accuracy
Customer Experience	AI service agents on website/mobile — handles common questions and issues autonomously	Reduce costs, improve CSAT
Customer Experience	Sentiment analysis — identifies dissatisfaction across channels, triggers proactive outreach	Improve satisfaction scores
Marketing	Product recommendations — analyzes preferences and past behavior for personalized promotions	Increase cross-sell conversions
Operations	Dynamic pricing — analyzes demand, competitor pricing, historical data to adjust rates in real time	Boost revenue, increase occupancy

Data 360: The Agent Tool Layer

"Data 360 is becoming the agent tool layer — ~200 APIs, 3 agent-facing meta-tools"

- Data 360 MCP Server — unified, governed access via MCP Protocol
- MCP Clients: Claude, ChatGPT, and others connect directly
- Capabilities exposed: Identity · Segments · Activations · Data Lake & Zero Copy
- Business outcomes: Richer context · More accurate actions · Faster responses

Activation destinations:

- Agentforce: RAG + hybrid search on unified profiles
- Salesforce apps: Sales, Service, Marketing Cloud
- Analytics: Tableau dashboards and BI
- Ad platforms: Precision audience targeting
- Third-party apps: Extend data value across the ecosystem

Customer examples (Salesforce delivery team, Sep 2026):

- Disney — service use cases + Agentforce grounding on Data 360
- Mastercard — unify customer data for CRM/CRMA visualization
- DoorDash — marketing use case + data visualization at scale

Implementation Considerations

Prerequisites

- Licenses: Integration Components for Business 360 + Customer 360 SaaS Edition + Salesforce Data 360 Connector
- Salesforce: Enterprise or Developer Edition with Data 360 provisioned
- Version match: extension package must match MDM SaaS version exactly
- Asset migration: dev → QA → prod manually; no re-import into higher envs

Deployment & Operations

- Data quality: customer-owned — scope explicitly before implementation starts
- Zero copy: metadata-only DLOs time out during IR → use data acceleration or Apache Iceberg federation
- Pricing: data service credits (per-row multiplier) + flex credits · in-region vs. out-of-region rates differ
- Streaming vs. batch: streaming consumes significantly more credits — use selectively
- Unmerge sync: predefined taskflow handles MDM record splits → auto-syncs unmerges to Data 360



Informatica

MDM Extension for Data 360: Building Context for the Agentic Enterprise

Assets to be Delivered

MDM Extension Bundle

Publish records from MDM to Data 360 DLOs

- MDM **Egress Jobs**
- CDI **Mappings**
 - Business Entity
 - Relationship
 - Source ID links
- **Taskflows**
 - Business Entities

Data 360 Datakit (unmanaged)

Publish records from MDM to Data 360 DLOs

- **Data Streams** to bring MDM golden profile data & source id links to DLO
- **DLOs** for golden profile records from MDM
- Data Model Object (**DMO**) extensions to support profile data from MDM
- Field Mappings (**DLO to DMO**)
- Identity based Match Rules

Key Takeaways + Q&A

"MDM governs what a record IS — Data 360 reveals what a customer DOES and WILL DO."

- 1. Complementary, not competing:** MDM (system of truth) + Data 360 (system of reference) = Trusted Context — the data foundation for the Agentic Enterprise
- 2. Pre-built assets accelerate time to value:** MDM Extension Bundle + Data 360 Datakit deliver the full pipeline without custom model design
- 3. Golden records ground AI:** MDM-governed data + Data 360 unified profiles make Agentforce outputs reliable, accurate, and trustworthy

Common Q&A

Q: Does Data 360 write back to source systems?

By default, no. MDM pushes golden IDs back to source systems — Data 360 does not. Custom egress from Data 360 to Snowflake is possible but requires configuration.

Q: Can you unify Accounts, not just Individuals?

Yes — Unified Account and Unified Link Account objects handle account-level unification in Data 360.

Q: Is segmentation only for Contacts / Individuals?

Segmentation can target both Accounts and Individuals — confirm object scope with your Data 360 architect.

TRUE TO THE FIELD

Q&A



Kamal Abrol
Architect, MDM and 360 Apps

