About the Speakers

Mark Chakar

- Director, Data Governance
  BREAKTHRU BEVERAGE GROUP
- 20+ years in the Beverage / Alcohol Industry (Pepsi, Diageo & BBG) across Operations, IT, and Data Governance
- Participated in MLB open try out for the Kansas City Royals & Cincinnati Reds

Dan Harter

- Manager, Data Governance
  BREAKTHRU BEVERAGE GROUP
- 21+ years in the Wine and Spirits industry, starting from IT operations, BI development, Sales and Marketing Analytics, to Data Governance.
- Spend my winter weekends skiing in the Poconos as a National Ski Patroller
Key Outcomes/Objectives

❶ *Functional & Technical Leadership Support* from the top down is critical.

❷ *Appropriate & Ambitious Data Stewards* to collaborate on Cleansing Activities & Key Decisions.

❸ *Realistic Goals & Expectations* to establish data quality targets & Key Metrics.

“Data is a *Program*, not a *Project*”
Agenda

• BREAKTHRU BEVERAGE GROUP (BBG)
  – Industry / Company Background, History & Corporate Structure
• Challenges → Solutions
• Data Quality Monitoring Journey
  – Material, Vendor & Customer
• Implementation Timeline
• Governance & Compliance
• Key Successes & Lessons Learned
BREAKTHRU BEVERAGE GROUP (BBG) Background

- Family-Owned & Operated North American Beverage Distributor
- Over 7,000 Employees across 15 US States & Canada
- Represents a portfolio of premier Wine, Spirit & Beer brands totaling more than $6 Billion in annual Sales

2nd level of a 3 Tier Industry
BREAKTHRU BEVERAGE GROUP (BBG) Background
BREAKTHRU BEVERAGE GROUP (BBG) History

BBG has been on a 80+ year journey of acquisitions by Wirtz Beverage & Charmer Sunbelt Group.

- 1945: Acquisition by Wirtz Beverage
- 1965: Acquisition by Wirtz Beverage
- 1977: Acquisition by Wirtz Beverage
- 1983: Acquisition by Charmer Sunbelt Group
- 1987: Acquisition by Wirtz Beverage
- 1992: Partial State Rights
- 1995: Partial State Rights
- 2001: Acquisition by Wirtz Beverage
- 2006: Acquisition by Wirtz Beverage
- 2007: Acquisition by Wirtz Beverage
- 2014: Acquisition by Charmer Sunbelt Group
- 2016: Acquisition by Wirtz Beverage

The map shows the states of MN, WI, IL, PA, NY, VA, SC, FL, MD, and DC, indicating acquisitions and state rights.

- = Wirtz Beverage Acquisition
- = Charmer Sunbelt Acquisition
- = Partial State Rights
- = BBG Affiliate
- = Current BBG Makeup

Canada is also shown on the map.
Challenges We Faced...

- Multiple ERPs
- SAP Implementations spanning over 12 years from varied legacy systems
- Mix of Centralized / Decentralized Master Data Setup
- State Governed Regulatory Restrictions
- Siloed IT Departments

Led to...

- Process Variation
- Unclear Ownership / Accountability
- Lack of Data Standards
Material Data Quality Monitoring Journey

- **Material Setup is Performed Centrally and at a Local Market Level**
- **Varied Creation Request Channels**
  - E-mail | EDI | Non-SAP Material Mirroring

**SMEs Identified**
- **1 Central**
  - Product Library Group Mgr.
  - Initial Material Creation
  - MMO2 Basic Data 1 & 2
- **3 Local**
  - State Purchasing Managers
  - Material Extensions
  - MMO2 all remaining tabs

**Material Creation & Maintenance Field Evaluation & Documentation**
- **3 Day Working Session**

**PHASE I**
- **Low Hanging Fruit**
  - **43 Info Steward Rules**
    - **13 SAP Changes**
      - 6 Central
      - 37 Local
      - 7 Market Specific
      - 3 Repeatable
      - Field Defaults & Parameters
  - 7 Local

**PHASE II**
- **More Complex Rules Applied to Structured Fields**
  - **65 Rules**
    - 3 Central
    - 62 Local
    - 7 Market Specific
    - 6 Repeatable
  - **2 SAP Changes**

**PHASE III**
- **100% Tool Adoption by Data Stewards Onboarding of Market New to SAP**
  - **31 Rules**
    - 7 Central
    - 24 Local
  - **Over 10 Markets**

**Varied Creation Request Channels**
- E-mail | EDI | Non-SAP Material Mirroring
Vendor Data Quality Monitoring Journey

**PHASE I**
Research Intensive
Identification Of Incorrect Addresses
1600 Pennsylvania Ave vs. 1600 Connecticut Ave Would result in Returned Mail

**PHASE II**
Tool Provided Fixes

<table>
<thead>
<tr>
<th>4 Digit Zip Extension</th>
<th>Abbreviation Conformity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location Accuracy</td>
<td>Road / RD / Rd.</td>
</tr>
</tbody>
</table>

**PROCESS UPDATE:** Desire to cleanse only active Vendors led to an effort to identify inactive Vendors to exclude them from evaluation.
Customer Data Quality Monitoring Journey

**PHASE I**
Entire Customer Universe

- 135 Info Steward Rules
- 5 SAP Changes
  - 13 Market Specific
  - 13 Repeatable over 11 markets

**NEW Standardized Operating Procedure**
(in the works)
Markets all using the same essential Inactivation Steps

**PHASE II**
Identification of Inactive Customers

- 11 Info Steward Rules
- SAP Development
  - Specific to local market Inactive Customer Identification
  - Fields to be added to flag and classify an Inactive Customer

**PROCESS UPDATE (Like Vendor)**
Inactive Customer Identification

100% Decentralized Setup
Information Steward Timeline to Date...

- **Information Steward Purchase Approval**
- **Environment Configuration & Install**
  - Kickoff
  - Rule Development & SAP Change Identification
  - End User Training
  - Go-Live
  - Phase II Rule Development
  - Phase II Go-Live
  - State of Rules One-on-Ones

**Consolidated Data Quality Scorecard Development in WEBi**

- **Trade / Non-Trade Kickoff**
- **Local Kickoff**
- **Rule Development**
- **Inactivation Research**
- **Go-Live**
- **Application of USPS Cleansing Advisor to Non-Trade**
- **Phase II USPS Cleansing Advisor**
- **Phase III USPS Cleansing Advisor**

- **Kickoff**
- **Research**
- **Proposed Rules & SAP Changes Presented / Go-Live**
- **Inactivation SOP Development & Customer Field Use process standardization**
How Do We Govern & Ensure Compliance?

- **Monthly Scorecards** distributed to vested Stakeholders
  
- Involved in **Discussions with IT** regarding **Future SAP Development**
  
- Regularly occurring **Super User Group Calls**
  
- **Screening Requirements & Processes** with the Market level & Central Teams
Key Successes

• Creation of over **330 Rules in Info Steward** across **3 functional areas** to ensure accuracy and increase efficiencies, for **dozens of associates in 11 markets & 2 central teams**

• **Data Quality Improvements:**
  - Material +95% (17 Months) / Vendor +85% (12 Months) / Customer +50% (2 Months)

• SAP Development **Decreased Key Strokes for Data Stewards**

• Leveraged USPS Cleansing Advisor to **improve Customer & Vendor address information**

• Demonstrated **Effective Ways of Working** across multiple teams and communication of status and successes to Key Stakeholders

• **Formalized Data Governance SOP**

*Improvement % = # of failing Items week 1 vs. Current week → Dependent on Items evaluated and # of Rules*
Lessons Learned

- **Strong Business Case** is Essential
- **Technical Support** Point of Contact
- Tool **Implementation Time**
- Leverage Helpdesk **Ticketing Process**
- **Version Upgrades** will be Necessary
- Understanding **Downstream Effects**
Take the Session Survey.

We want to hear from you! Be sure to complete the session evaluation on the SAPPHIRE NOW and ASUG Annual Conference mobile app.
Presentation Materials

Access the slides from 2019 ASUG Annual Conference here:

http://info.asug.com/2019-ac-slides
Q&A

For questions after this session, contact us at
mchakar@breakthrubev.com & dharter@breakthrubev.com
Let’s Be Social.

Stay connected. Share your SAP experiences anytime, anywhere. Join the ASUG conversation on social media: @ASUG365 #ASUG