



FROM MASTER DATA DOMAIN TO RINSE & REPEAT

Mark Chakar, Director & Dan Harter, Manager
Data Governance

BREAKTHRU BEVERAGE GROUP (*BBG*)

Session ID #82708

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

- 1 *Functional & Technical Leadership Support* from the top down is critical
- 2 *Appropriate & Ambitious Data Stewards* to collaborate on Cleansing Activities & Key Decisions
- 3 *Realistic Goals & Expectations* to establish data quality targets & Key Metrics

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

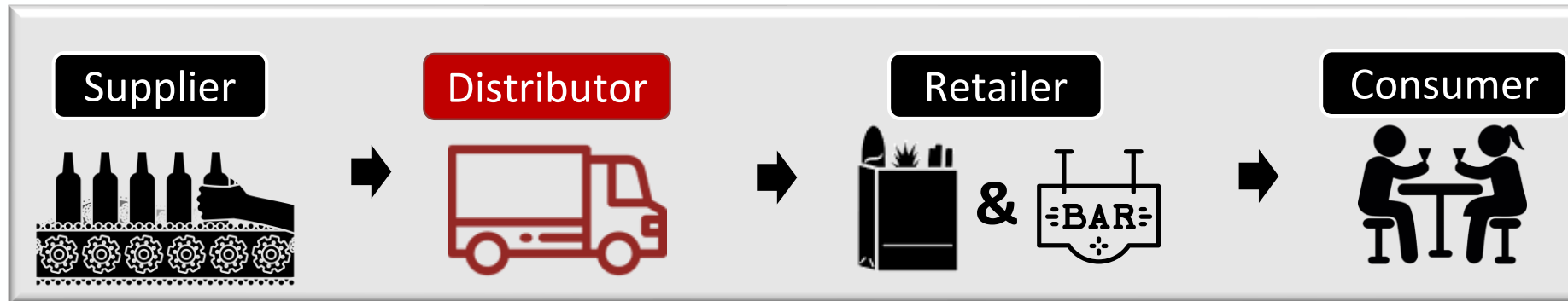
Agenda

- 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

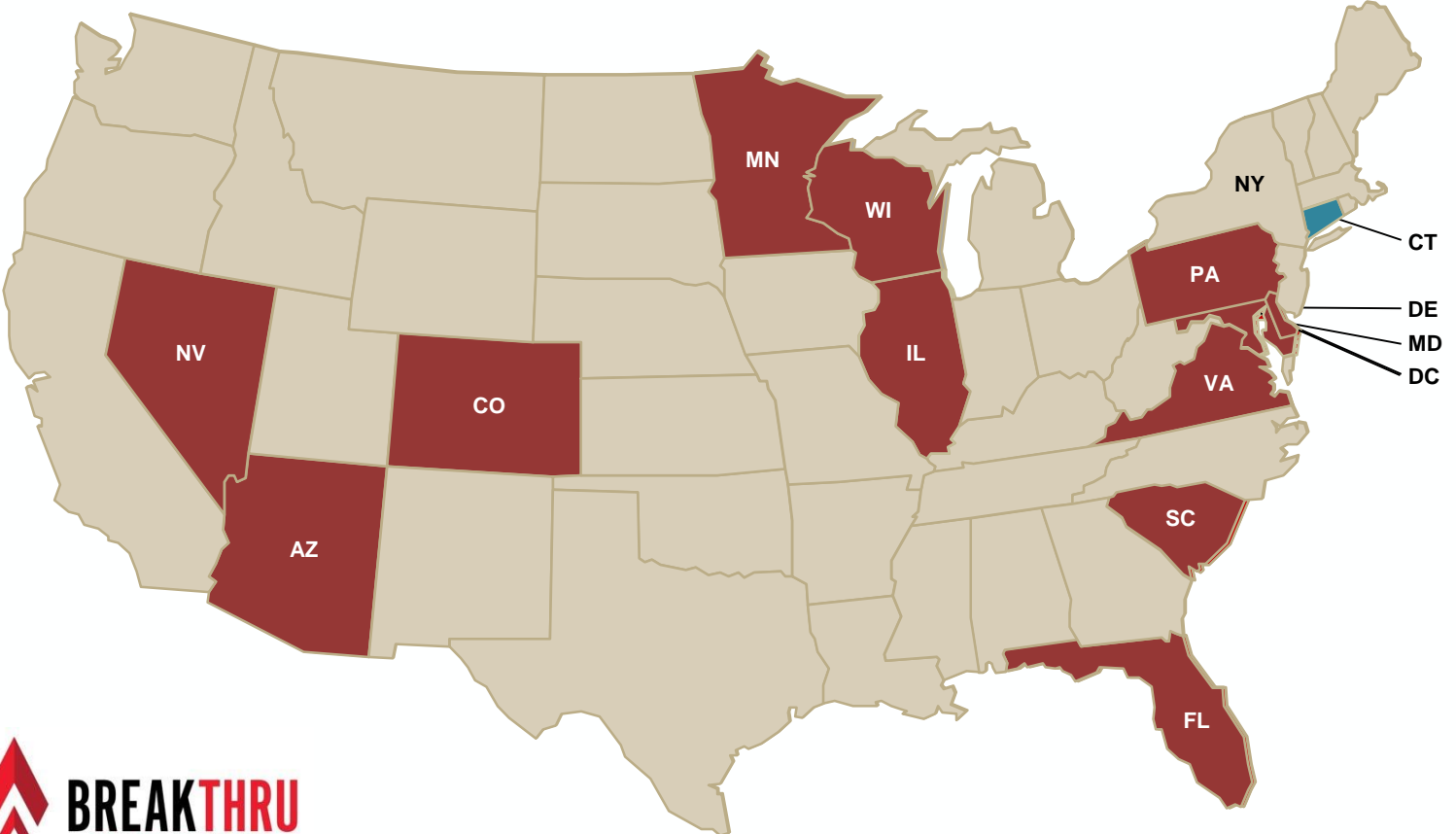
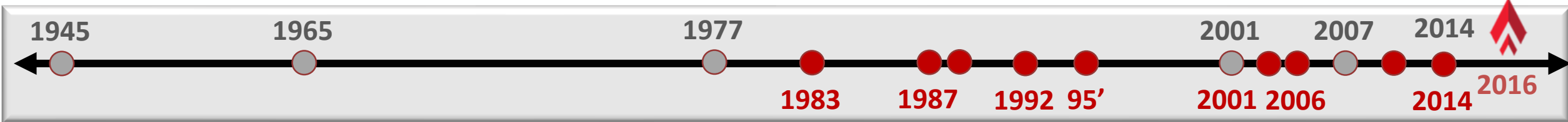







BREAKTHRU BEVERAGE GROUP (BBG) Background



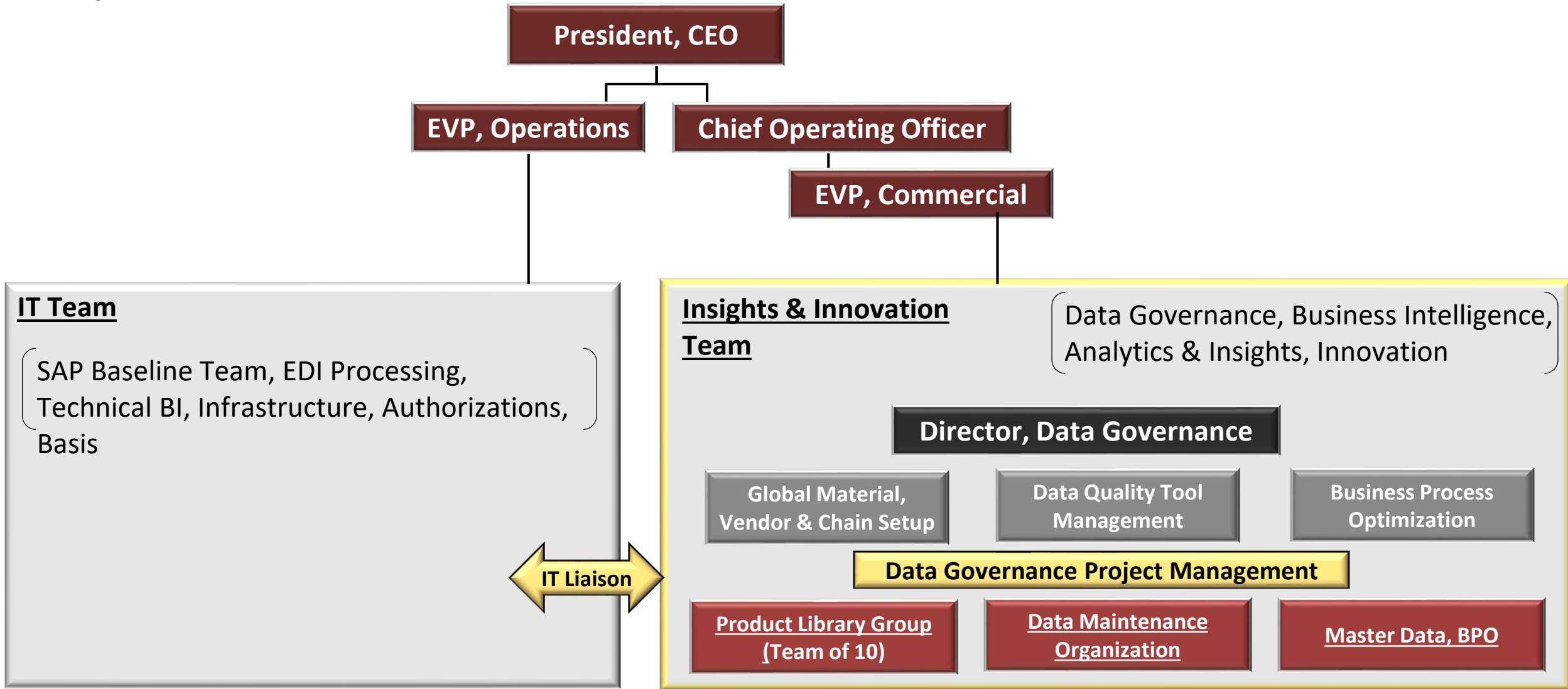
BREAKTHRU BEVERAGE GROUP (BBG) History

BBG has been on a 80+ year journey of acquisitions by  WIRTZ BEVERAGE &  THE CHARMER SUNBELT GROUP



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

Corporate Structure

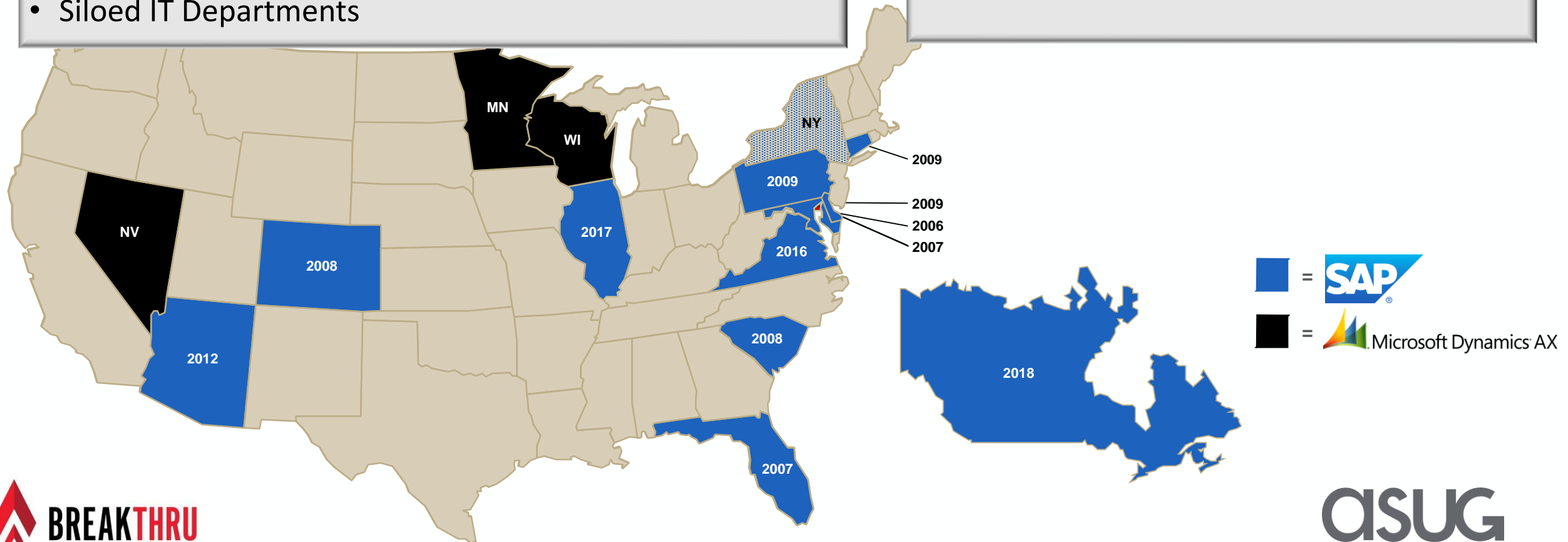


Challenges We Faced...

- 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	3 Local
<ul style="list-style-type: none"> - Product Library Group Mgr. - Initial Material Creation - MM02 Basic Data 1 & 2 	<ul style="list-style-type: none"> - State Purchasing Managers - Material Extensions - MM02 all remaining tabs

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



Phased Approach Identified

SAP Information Steward | **PHASE I**
Low Hanging Fruit

43 Info Steward Rules		13 SAP Changes
6 Central	37 Local	Field Defaults & Parameters
	7 Market Specific 3 Repeatable over 10 markets	

PHASE II
More Complex Rules Applied to Structured Fields

65 Rules		2 SAP Changes
3 Central	62 Local	
	7 Mkt Specific 6 Repeatable	

PHASE III
*100% Tool Adoption by Data Stewards
 Onboarding of Market New to SAP*

31 Rules	
7 Central	24 Local

Vendor Data Quality Monitoring Journey

Setup
Centralized & Local

Vendor Creation & Maintenance Field Evaluation & Documentation

Trade Vendors
 - *Product Library Group Manager*
 - *Central Trade Vendor Creation*
 17 Rules

Non - Trade Vendors
 - *Business Shared Services Team*
 - *Central Non-Trade Vendor Creation*
 13 Rules

Local Vendor Maintenance
 - *State Purchasing Managers*
 - *State Level Vendor Extensions*
 20 Rules
 - *2 Repeatable over 10 markets*



USPS Cleansing Advisor Evaluation of Non-Trade Vendors



Phased Approach Identified

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

4 Digit Zip Extension <i>Location Accuracy</i>	Abbreviation Conformity <i>Road / RD / Rd.</i>
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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

100%
Decentralized
Setup

Customer Creation & Maintenance Field Evaluation & Documentation
~ Dozen 1-on-1 Sessions

PHASE I
Entire Customer Universe

135 Info Steward Rules		5 SAP Changes
13 Market Specific	13 Repeatable over 11 markets	Field Defaults & Parameters

PROCESS UPDATE (Like Vendor)
Inactive Customer Identification



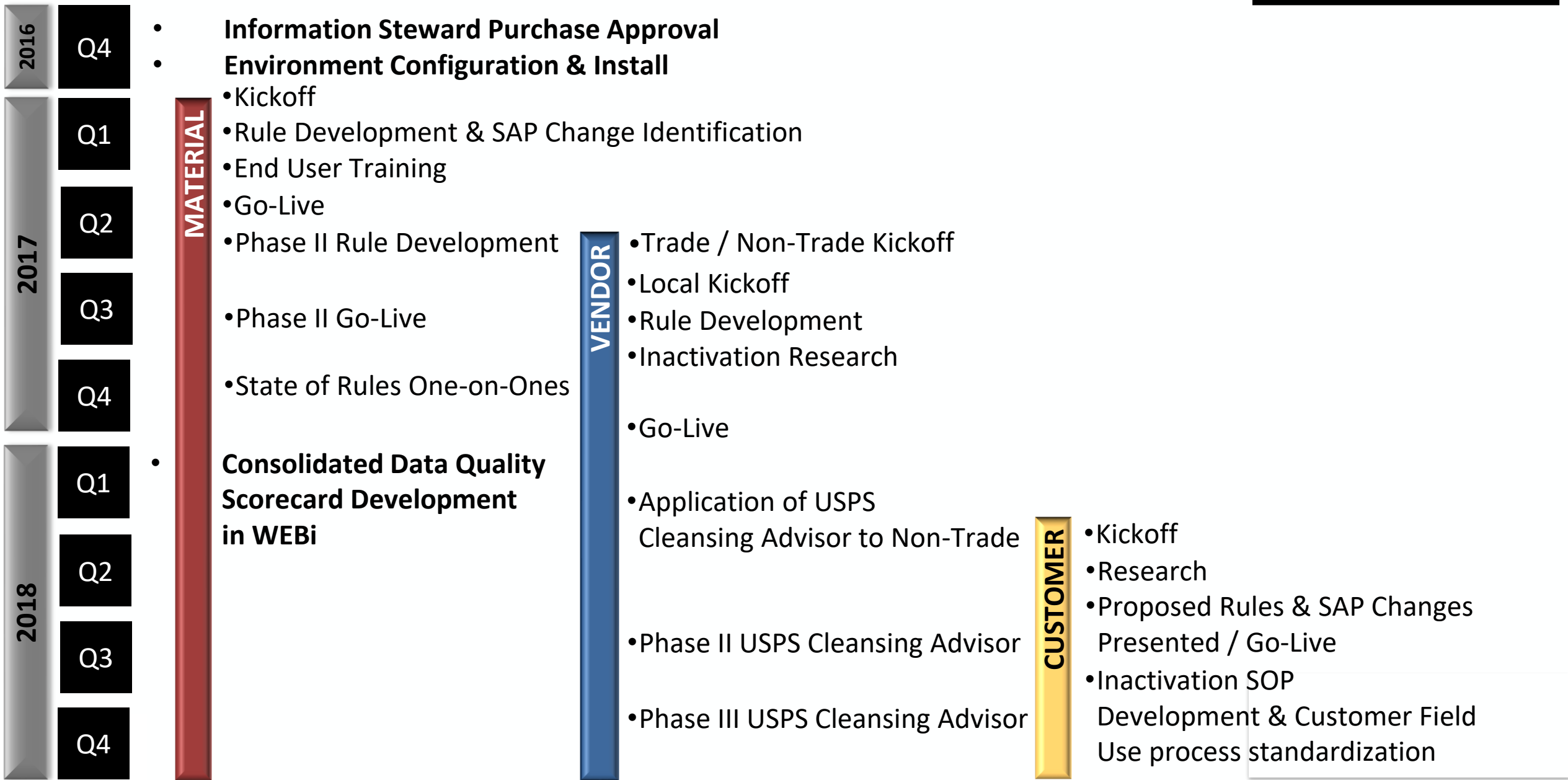
PHASE II
Identification of Inactive Customers

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

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

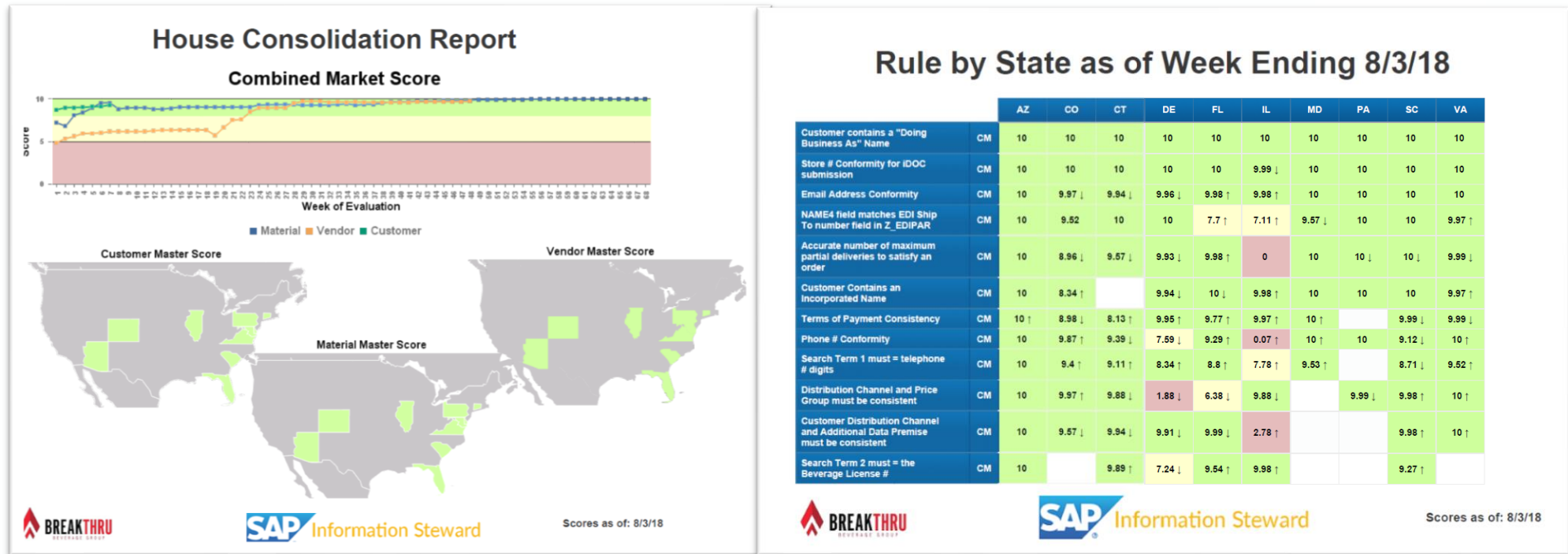


Information Steward Timeline to Date...



How Do We Govern & Ensure Compliance?

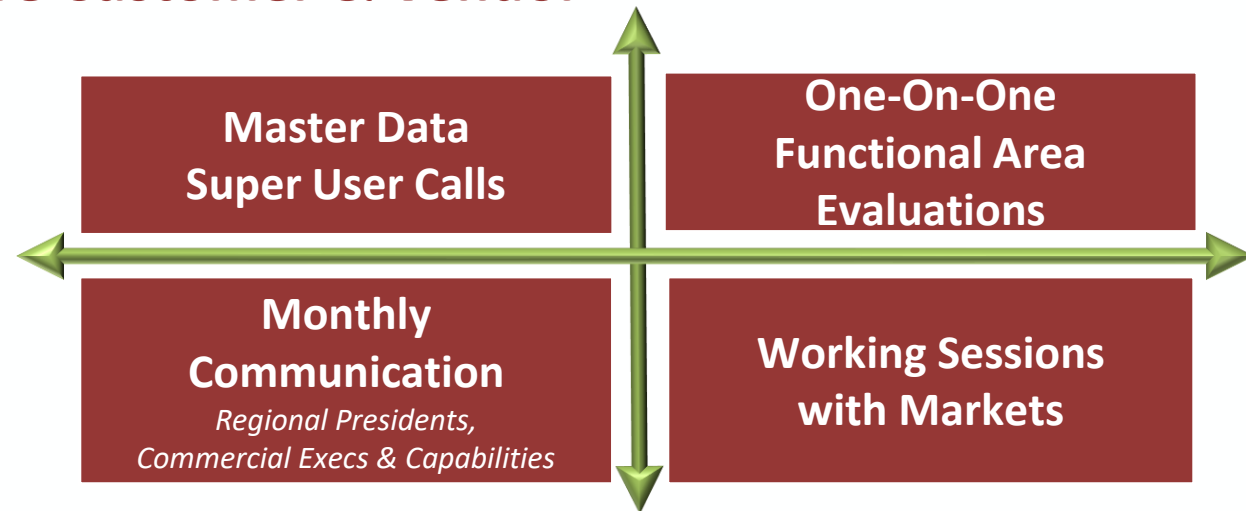
- **Monthly Scorecards** distributed to vested Stakeholders



- 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**

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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
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