

Optimizing the Trade Ecosystem: Improved Data Modeling for a Confectionery Company

The client, a global \$46B confectionery company, was looking to improve data access and quality across an expansive data-focused ecosystem. An extensive analysis was performed that highlighted the need for improvement across existing data sets, differing systems, and updated business rules.

The client engaged Clarkston to help identify and recommend solutions to resolve their current situation of multiple systems and manual processes. Because of this, there were inconsistencies in data input, data accuracy, and reporting were all contributing to a frustrating user experience. The current approach was no longer meeting the needs of their consistently growing business and demands on their sales and trade teams. Due to the complexity of their business, the client highlighted the cleansing and synthesizing of data as their top priority.

The data plan was broken down into three areas:

- *Centralize and Model Data:* Cleansing of master data and centralizing data access through a data lake so that all systems in the ecosystem have access and can speak to one another.
- *Improve Data Access and Quality:* Using existing reports as a base, enhance quality by bringing in new KPIs that are aligned across systems, and create training for key stakeholders for best-in-class reporting.
- *Certify Data and Insights:* Define the certification process and finalize and publish catalog of all KPIs and reports to ensure consistency of definition.

All of the activities for data modeling would need to be closely coordinated across business and technical teams, engaging key stakeholders along the way.

Consumer Products Case Study

PROJECT OVERVIEW



INDUSTRY:



Consumer Products

PRODUCTS AND SERVICES:



Confectionary Products

PRIMARY OBJECTIVES:

- Execute a build of hierarchies that can flow across systems:
 - Customer Hierarchy: *Reviews done with customer teams to align on how teams plan*
 - Product Hierarchy: *Separated the two sections of the client's business and ensured the new hierarchies satisfy two very different segments*
- Cleanse master data
- Bring consumption data into the ecosystem and develop business rules for data implosion (*the harmonization of the client's internal product master data to the syndicated Nielsen or Circana data to enable analytic solutions and performance analytics*)
- Evaluate and determine downstream consequences of changes
- Enable global scalability for the data models

RESOLUTION:

- Managed the project from the business side in coordination with the client's project manager and functional lead
- Built and socialized new customer and product hierarchies in partnership with the client
- Worked with client's customer teams to ensure that the new hierarchy aligned with how they want to plan their business in the future state
- Partnered with the client to create business rules for consumption data to translate from shipment to sell through at shelf
- Helped develop and support training of admin and sales team
- Supported all aspects of cutover plan for data responsibilities
- Conducted KPI working sessions to align on formulas, naming conventions, and compliance across systems

KEY BENEFITS:

- Build, testing, and successful creation of both customer and product hierarchies
- Assignment of direct, indirect, and hybrid accounts and how each account can plan and how sales can manage their business
- Additional layers in customer hierarchy added to enable use across all systems
- Ability for users to plan as intended
- Ability to include Shopper Marketing data in their trade system
- Ability to bring consumption data into their forecasting and trade system for more accurate planning and actuals

KPIs

- Coordinated the reconfiguration of over 225+ planning accounts into a proper 5-level hierarchy structure, adhering to hierarchy rules
- 'Cleansed' old/unused products from SAP to new TPM system by over 70%
- Created mappings for 78 Nielsen CTAs to planning accounts and created documented process for business mapping rules
- KPI alignment on formulas, naming conventions, and compliance across systems
- KPI Change Request structure created to ensure collaboration and change control across both functional and technical teams

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