Trace One Devex PLM and Approaches to Self-sufficiency

Nick Duncan

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GLOBAL SPIRITS

Global R&D

Suntory Global Spirits
By The Numbers

6400+
People[1]

32
Distilleries and Operation Sites[1]

49
Corporate Offices[1]

25
Employer of Choice Awards[2]

#1
In Bourbon & Japanese Whisky[3]

69
Countries Where our Products are Sold[4]

100
Iconic Brand Families
Across Whiskies, Tequila, Gin, Vodka, Cordials, Rum & RTD[4]

Premium-Plus **54%**
Of our Global Sales for Full-bottle Spirits[4]

[1]as of 2024, includes select 3rd party sites | [2]as of 2023 | [3]2022 IWSR Data
[4]as of 2023 | 2022 IWSR Data and 2023 FY BSI Actuals @ latest rates

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Premium Whiskies

Marked by Legacy and Craftsmanship

Bourbon
#1 Globally

Japanese
#1 Globally

Scotch
#7 Globally in
Malt Scotch

Canadian
#3 Globally

Irish

Key Categories

Marked By Legacy And Craftsmanship

Tequila   Vodka   Gin   Cordials   Ready-To-Drink   Rum
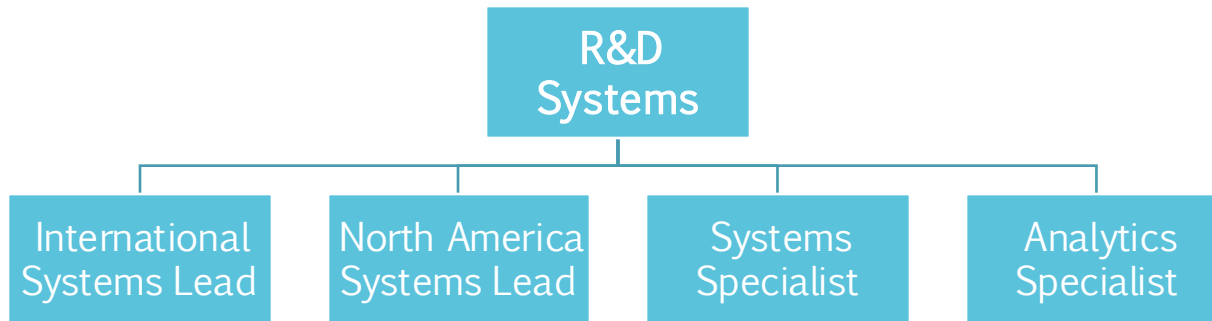
#1 In Japan
And Australia

Nick Duncan

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Member of Devex PLM Customer Advisory Board

R&D Systems
- International Systems Lead
- North America Systems Lead
- Systems Specialist
- Analytics Specialist

Special Considerations for PLM in the Spirits Industry

Some Industry-Specific Considerations

What's different about Spirits?

✓ "Cask Strength" paradigm doesn't exist in typical Food & Bev

✓ Distillation is a transformative process; not the sum of its parts

✓ Regulations may not align with scientific reality (e.g., gluten declarations)

(not to scale ☺)

Our PLM Journey

Continuous Evolution

Document Management System

Pre-2018

PDF/.DOCX Specs

Previous PLM US Launch

2018

Structured Data

Global Expansion

2021

Rollout to Canada & Spain

Major Issues Identified

2019

Global Rollout Paused For Rework

System EOL
Notification from
Previous PLM Vendor

Devex Wins RFP

2023

Process Mapping & Implementation

Phased Rollout Begins

2024+

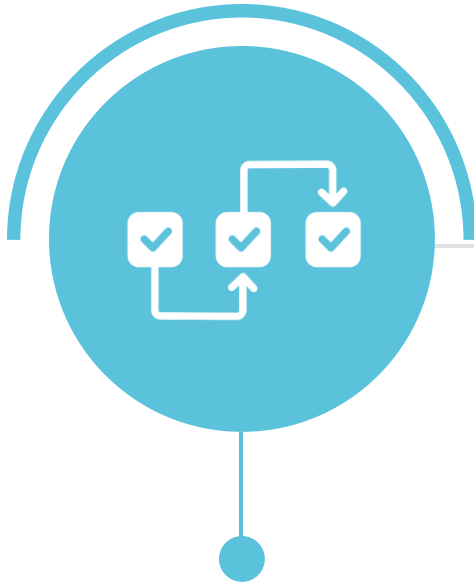US, Canada, Spain, Scotland

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What Does Self-Sufficiency
Look Like at SGS?

What Self-Sufficiency Looks Like for SGS

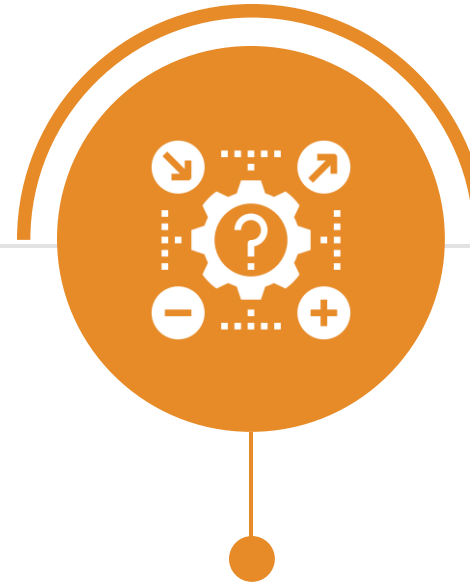*To be self-sufficient, we need to....*

**Understand
Our Business**

Accommodating process
variants driven by
acquisitions.

**Understand Best
Practices**

Deliberate application of,
& deviation from best
practices.

**Understand The
Possible**

How can we solve a
business problem out of
the box?

**Understand The
Impossible**

When Devex *can't*
support – customization
vs. internal change.

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Practical Examples of Self-Sufficiency

Understand The Business

Understanding the whole business is critically important for Phased Implementations

Understand The Possible

Devex can be set up to meet many of your needs if you ask the right questions.

Understand The Impossible

Even if customization is possible, should you do it, or can you adapt your process?

Examples

Future phases needed to address operating units with different org structures, M-BOM structures & composition

Changing internal processes allowed us to leverage OOB mass-replace tool for annual laydowns

Let Devex be your E-BOM system and SAP be your M-BOM system (Abhi was right all along!)

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"Are we there yet?"

Nope. But, we're getting there!

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Why aren't we there yet?

Our Current Roadblocks to Self-Sufficiency

Ongoing Go-Lives
We're still understanding the structures & requirements of our future launch sites.

Technical Onboarding
R&D Systems team is still learning the ins-and-outs of Devex capabilities.

Learning From Mistakes
We've changed our mind about some implemented configurations in pursuit of best-practices.

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How are we working to become self-sufficient?

Our Approach

Bringing a Gemba-Mindset to Self-Sufficiency

Do It Yourself

The more your admins can learn by doing, the better their support.

Win Change Management

Real change is driven by analysts who understand the business and the system.

Be Where the Work Is

Organizing effectively is key. Our admins and BAs are R&D.

Phone A Friend

When in doubt, ask for help; Trace One is a critical resource.

Gemba (現場) is the Japanese term for "actual place," used describe where value-creating work actually occurs.

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CONCLUSION

1 Set a **north star** for what self-sufficiency looks like for you.

2 Understand how your **system will support** the processes you intend to implement and **how it can't**.

3 **Partner with your Trace One team** to learn as much as you can through the implementation.

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Thank You!