

A Path to a Successful PLM Implementation

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Beam SUNTORY



It's Nice to Meet You!

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Introductions

Nick Duncan
Technical Lead



Manager, R&D Systems

Olivia Hennis
Project Management, Process Mapping



Continuous Improvement Specialist

An aerial photograph of a large, dark, industrial-style building with a corrugated metal roof and vertical slats on its exterior walls. The building is situated in a green, landscaped area with a parking lot to the left containing several vehicles. In the background, there is a golf course and a cemetery. The text "Who Is Beam Suntory?" is overlaid in large white letters across the center of the image.

Who Is Beam Suntory?



BEAM SUNTORY

BY THE NUMBERS

6000+

PEOPLE

26

DISTILLERIES
AND OPERATION
SITES

30

CORPORATE
OFFICES

20

EMPLOYER
OF CHOICE
AWARDS

#1

IN BOURBON
& JAPANESE
WHISKY

78

COUNTRIES
WHERE OUR PRODUCTS
ARE SOLD

105

ICONIC BRAND
FAMILIES ACROSS
WHISKIES, COGNAC,
TEQUILA, GIN, VODKA,
CORDIALS & RTD

55%

GLOBAL SALES
FULL-BOTTLE
SPIRITS

Where We Are in Our PLM Journey

OUR PLM JOURNEY

2020

2022

June 2023

Oct 2023

2024+



Old Spec System

Old System EOL
Announced



RFP & Selection

Vendor Research &
Demos



Planning

Cross-functional
current/future-state
process mapping



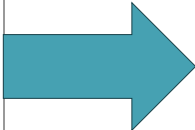
Implementation

Business requirements
and builds



Roll-Out

Phased go-live approach



RFP & Vendor Selection

Implementation Scope



Liquid Development

- Experiments
- Product Development
- BoM Management



Packaging Development

- BoM Management
- Weights & Dimensions Roll-up
- Reporting



Regulatory Compliance

- Liquid Compliance
- Labeling Guidelines
- Reporting

We needed a partner who had experience in the spirits industry

The RFP Process

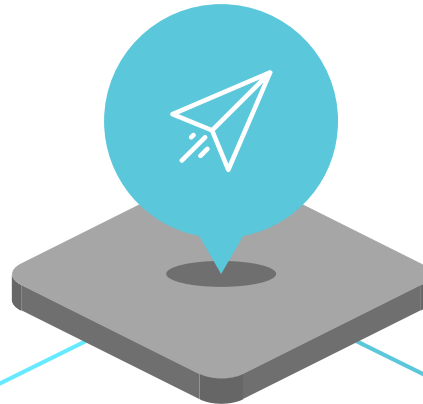
RFP Documentation

Business and IT requirement collection is a crucial first step.



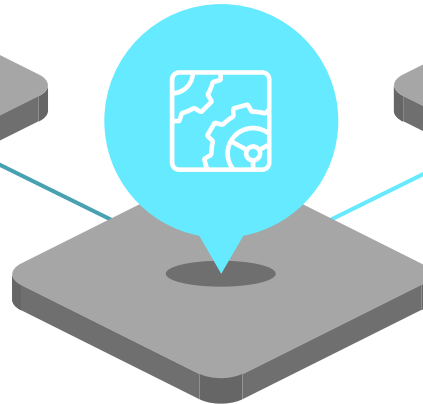
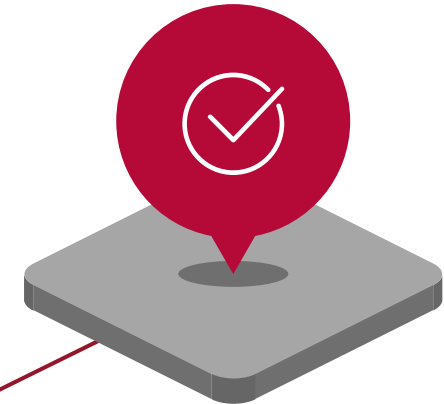
RFP Responses

Vendors complete RFI information and give demos that address RFP Documentation



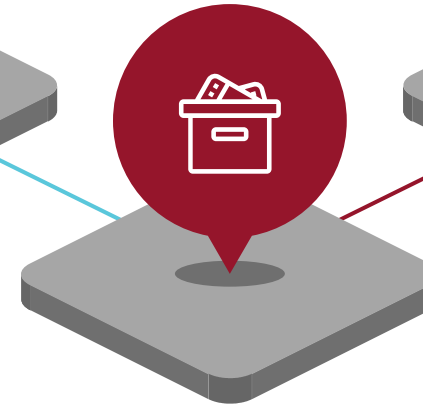
Contract Signed

Formalize requirements into an SoW



Vendor Identification

IT Research firms like Gartner/Forrester can be a big help



Vendor Selection

Scoring and cross-functional alignment

Scoring

Comprehensive and unbiased evaluation criteria is critical to a successful scorecard.

- ✓ Collect responses in a structured but easy-to-use way such as MS Forms with Excel backend
- ✓ Role-specific voting (through branching questions) to focus expertise
- ✓ Score weights should reflect organizational priorities.
- ✓ Transparency is key – get alignment on your evaluation methodology early.

System RFP Scorecard PROJECT PHOENIX

* Required

General Functionality & UI
This section applies to all users

2. Please rate the User Interface's intuitiveness.
*
Does this system look user-friendly? Is the UI intuitive? Does it seem responsive?
☆ ☆ ☆ ☆ ☆

3. Please rate the search capabilities.
*
Please account for things like global search, a 'where used' functionality, etc.
☆ ☆ ☆ ☆ ☆

4. Please rate the system's user customization features for home pages & dashboards.
*
e.g. Can users customize their home page? Can they add custom widgets, favorites, etc.
★ ☆ ☆ ☆ ☆

5. Please provide any other commentary you have about the system UI, Home Page, or Dashboards
Optional
Enter your answer

Why Devex?

1

Spirits Experience

Few vendors have the level of spirits industry experience or partnership with DISCUS

2

Cross-functional alignment

Best fit for the unique requirements of each team that was part of the assessment.

3

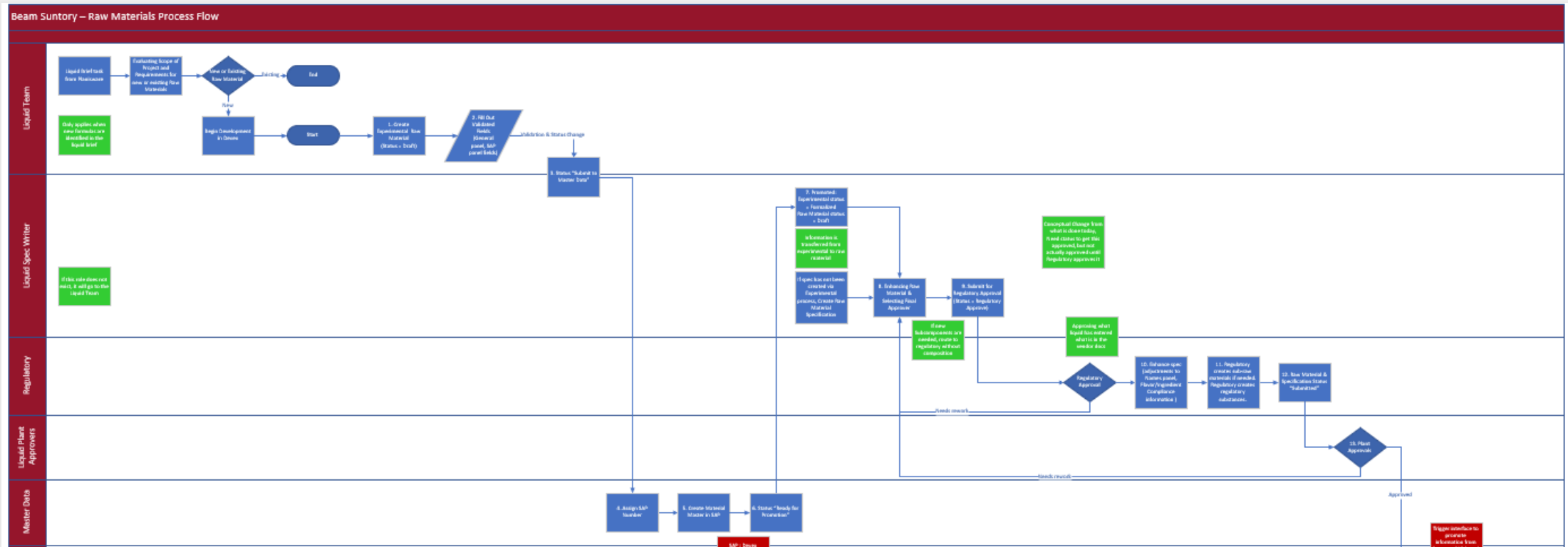
Technical POC

Collaborative pre-sales process helped create a proof of concept to demonstrate system capabilities

Vendor	Function	Avg Weighted Score
Devox	Liquid Development/MIT	4
	OU Representative	3
	Packaging Development	4
	Plant Quality	5
	Regulatory	5
	System Admin (R&D Systems)	4
Devox Total		4.00
Vendor "1"	Liquid Development/MIT	2.5
	OU Representative	2
	Packaging Development	2
	Plant Quality	3
	Regulatory	1
	System Admin (R&D Systems)	2
Vendor "1" Total		2.14
Vendor "2"	Liquid Development/MIT	3.5
	OU Representative	3
	Packaging Development	2
	Plant Quality	4
	Regulatory	2
	System Admin (R&D Systems)	2
Vendor "2" Total		2.88
Vendor "3"	Liquid Development/MIT	3
	OU Representative	3.5
	Packaging Development	4
	Plant Quality	3
	Regulatory	1
	System Admin (R&D Systems)	4
Vendor "3" Total		3.13

Planning

Processing Mapping



Identify your Key Stakeholders

These should be functional representatives who know the current process and have a strong idea of what the desired future state will be.



Collaboration methodology

Use a tool conducive to the collaboration style of your work culture; in-person is ideal but online tools can help!

Design Requirements

Identifying the Sections and Fields to support our specific business process

Central List

Data Groups and Data Points

Lists of Parameters or Values

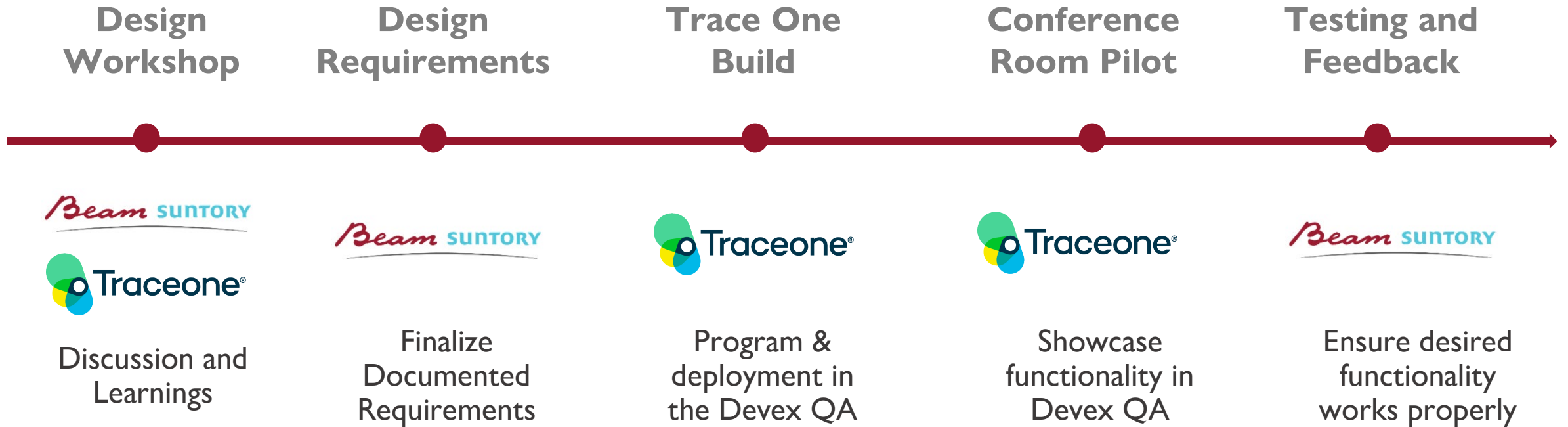
Status Management

	A	B	C	D	E	F
1	Func. Re	Func. Req Name	Func. Req Description	Links	Priority	Status
	IM001	Plant List in system	For all areas in the system that reference plants. Build list of Plants (including Code & country in the system). Ability to multi-select plants wherever there is a plant field.	Refer to Plants	High (Must Have)	Ready for Test
2	IM002	Create Raw Material Groups and Types	Create the specified list of Raw Material Groups and Types. Follow the given hierarchy between Raw Material Groups and Types.	Refer to Raw Mat Groups and Types	High (Must Have)	Ready for Test
3	IM003	Material Code for Experimental Raw Material	Ability to create Experimental Raw Materials in system using system generated code only. The code should have prefix XR.		High (Must Have)	Build Complete
4	IM004	Data Groups & Data Points for Experimental Raw Materials	Configure Data Groups and Data Points for material type Experimental Raw Material. This change includes add/ remove Data Groups and add/ remove Data Points. The goal is to ensure that all information required for SAP material creation is captured and documented in Experimental Raw Material and to capture the SAP material code as	Refer to Experimental Raw Material Data	High (Must Have)	

Data Group	Data Point	Data Type	LIST OF VALUES items	Length
Sensory	Sensory Evaluation (Table Name): Columns: Tasting Solution: List of Values Tasting Solution Use Level (%): Number (length 11.3) Comments: String (length 2000)		Tasting Solution: 00: Acidified Solution 01: Non-Acidified Solution 02: Other 03: Water	
	Sensory Properties - Target (Section Header)			
	Appearance	STRING		2000
	Aroma	STRING		2000
	Flavor	STRING		2000

Implementation

Approach



Categorical Workstreams



INGREDIENTS & BASE PACKAGING

Lowest level components



FORMULAS & FINISHED GOODS

Assembled products



REGULATORY COMPLIANCE

Calculations, Roll-Up Logic, & Guidelines



INTERFACES (SAP)

Communication between systems



DATA MIGRATION

Bringing over existing information



USER TRAINING

Reference material and demonstrations



Roll-Out

Phased Approach

	2023	2024	2025	2026+
H1	All Current spec system OUs Proactively gather data for 2024 OUs to enable quicker launches	Additional OU	Specialty Projects	Remaining OUs
H2		Additional 2 OUs Process Map Specialty Projects	Partnerships	



Q & A

