

## TM1 Architecture & Design

### Business Overview

Our client is a mid-sized regional brewery (“The Brewery”) that received a substantial infusion of cash to allow it to grow through a strategy of controlled acquisitions into a national presence.

Initially, The Brewery had five brands with 97 different flavors. After the first acquisition, this increased to 6 brands and 113 different flavors tripling both volume and annual revenue for the brewery.

Currently the company brews 11 different brands with 240 flavors of their own beer and distributes it through wholesalers in 8 geographic regions though out the US. In addition to their commercial brands, they brew 8 brands under contract from other national breweries.

### Business Challenge

With the growth by acquisition strategy employed by The Brewery, each acquired environment had its own systems, processes, and people. Each group came at the Planning problem based on their historical perspective. It was critical to get a single view, understood by all, and capable of being created and adapted by each varying group. And, in this distributed, fast-paced environment, finding a way to do Planning and Budgeting consistently and accurately was key.

### Solution

Since the desire by management was to have an integrated solution across their existing systems and their newly formed data warehouse and BI system, and since a fully-functional planning solution across the organization was too large a task for a single step, LPA gathered the requirements for the initial stages of a planning platform from Sales, Finance, and IT areas.

The process LPA followed was our Compass™ best-practices process. Namely, starting from the existing requirements, interview key stakeholders to fill in any gaps that might exist and to accurately plan the design of the solution. We understood those systems that were in transition (but had been identified by management as to be phased out as fast as possible). We documented the key business drivers. We documented the functional business requirements for planning and reporting, and refined our estimates of workloads and timelines.

With this information, LPA delivered a functional requirements document for review by management, along with a project roadmap for a long term vision. Within this document we offered suggestions about how to align their current planning and reporting environment to move to and toward a best-practices process. We also highlighted data sources and potential issues.

The high-level design was done consistent with a best-practices approach, within the reality of the current environment and constrained by the cost and time management wanted to invest at this time.

## Results

- A standardized planning platform that can be expanded to other departments over time
- A best-practices approach to planning and budgeting, integrated into the tool so ongoing governance is simpler
- A much easier generation of a plan for Sales and Finance
- A solution integrated with their ERP system and their existing Data Warehouse/Business Intelligence environment
- A platform that can support future acquisitions, provide transitional reporting, and provide what-if scenarios for pre-acquisition reporting and analysis