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**Wynn, Martin G ORCID logoORCID: <https://orcid.org/0000-0001-7619-6079> and Flower, Robin (1997) Improving Account and Brand Management through Data Warehouse Applications. In: Vision in Business: Using EPOS Data and Customer Profiling to drive Category Management under ECR, June 25th/26th 1997, London. (Unpublished)**

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# Improving Account and Brand Management Through Data Warehouse Applications

Using EPOS data and  
Customer Profiling to drive  
Category Management  
under ECR

June 25th/26th, 1997  
London  
Vision in Business

Martin Wynn, IT Director  
Robin Flower, Commercial  
Systems Manager

H P Bulmer  
Hereford  
UK



# Presentation Structure

- 1 Bulmers: Company Profile
- 2 Customer profitability profiling via OLAP tools on the Data Warehouse.
- 3 Exploiting the Data Warehouse for added Commercial Benefits
  - Combining relational and OLAP technologies.
  - Product Launches.
  - Outlet Targeting .
  - Category Management.



\* Location: Hereford, UK

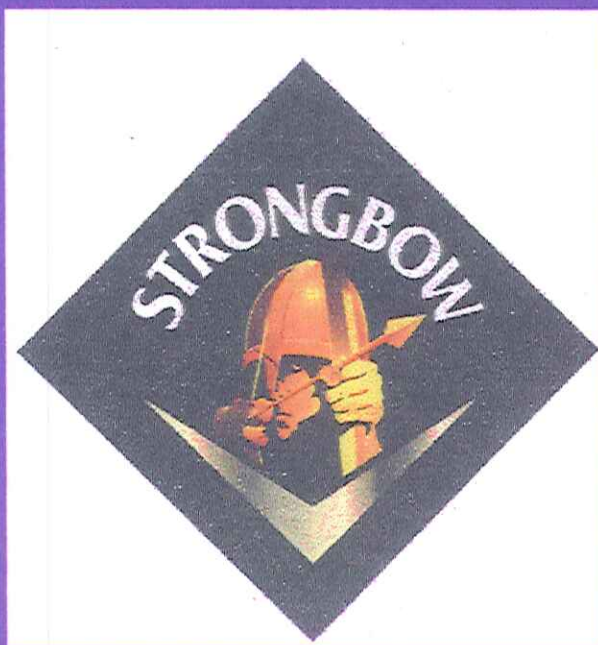
\* Turnover 1995/6: £255m

\* Profit 1995/6: £27.5m

\* Employees: 850



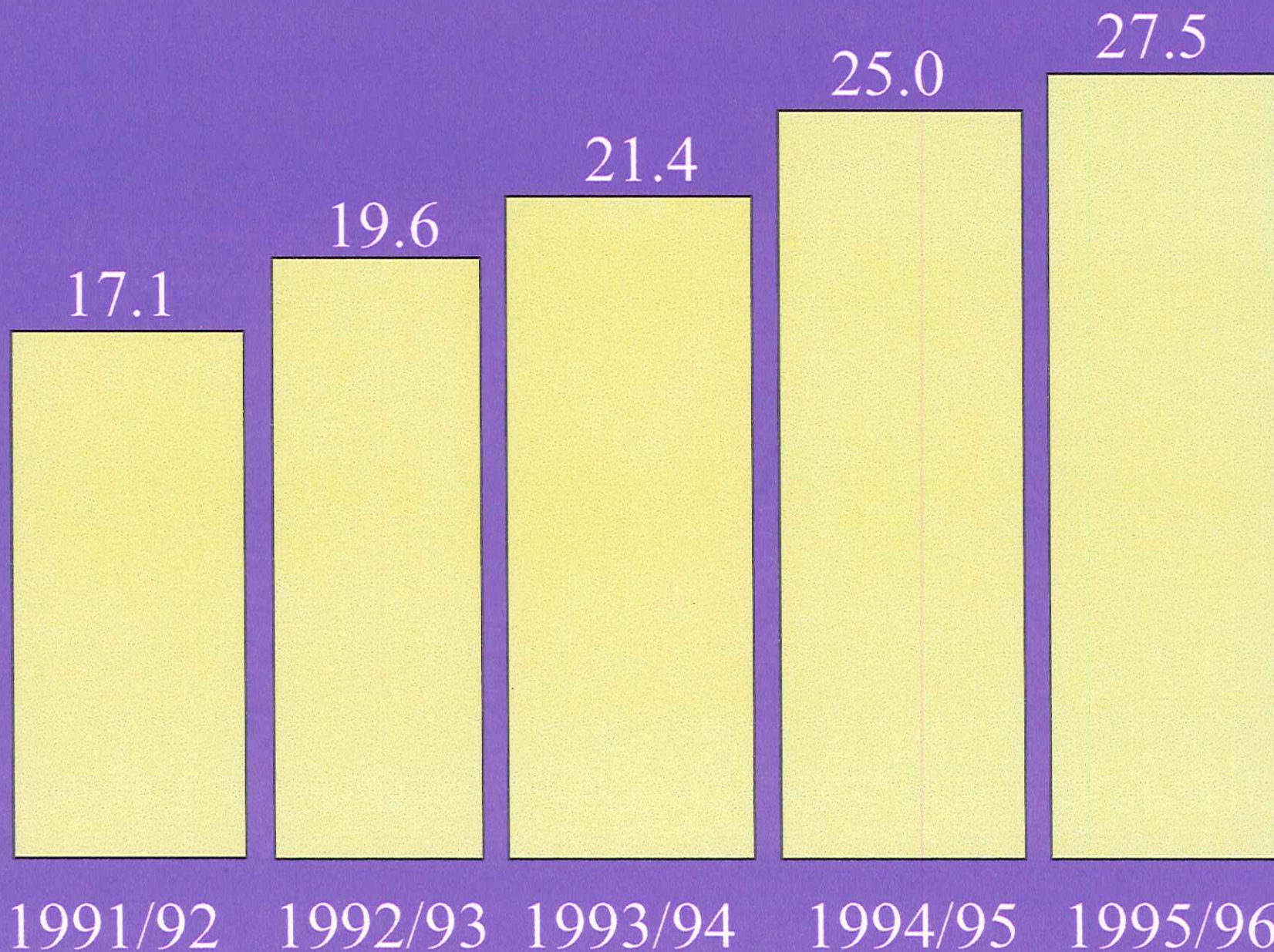






# H P Bulmer Pre Tax Profits 1991-1996

£M





# Market Dynamics

- \* Margin pressure and market segmentation.
- \* Challenge of alcopops and other product innovations.
- \* Increasingly viewed as another drink in the LONG Drinks market.
- \* International potential is key to our future.



# H P Bulmer: Key Business Drivers

- \* Continue to grow and dominate the UK cider market (Now 54% market share).
- \* Lead the global growth of cider.
- \* Lowest cost production.



# Systems Status 1990

- \* Under investment in IT in the '80's...
  - \* Legacy of in-house developed systems.
  - \* Poorly documented and supported.
  - \* Proprietary Data General environment.
- \* Various product and customer files...
  - \* Separately maintained.
  - \* Varying hierarchies and data definitions.



# Systems Status 1990

Problems with...

- \* Data Consistency.
- \* Management Information.
- \* Response to Business Change.

Systems in STYLE, COBOL, CQCS etc...

- \* Integration Impossible.
- \* Disproportionate Support Overheads.



# New IT & IS Strategies

\* 1990

- Oracle chosen as strategic relational database for bespoke developments.

\* 1991

- Open Systems (UNIX) adopted as platform for all future systems projects.

\* 1992

- Business co-ownership of all systems projects established.
- Oracle/UNIX established as guidelines for all major application packages.



# Profit Management Project

## Key Drivers

- \* Brand and account management by profit.
- \* Tracking account performance against forecast.
- \* Presentations to key accounts.
- \* Field to HQ communications, word processing etc.



# Customer Profitability Profiling

## Why Do It?

### Variability of Cost Total Sales

Discounts & Adjustments
Selling & Order Taking
Storage & Distribution
Production & Purchasing
Marketing & Advertising
Gen. Admin & Fixed Costs
Profit

### Customer Driven Variations in Costs as a % of Sales

0-25

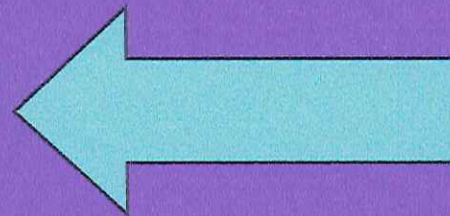
2-20

2-35

20-70

1-20

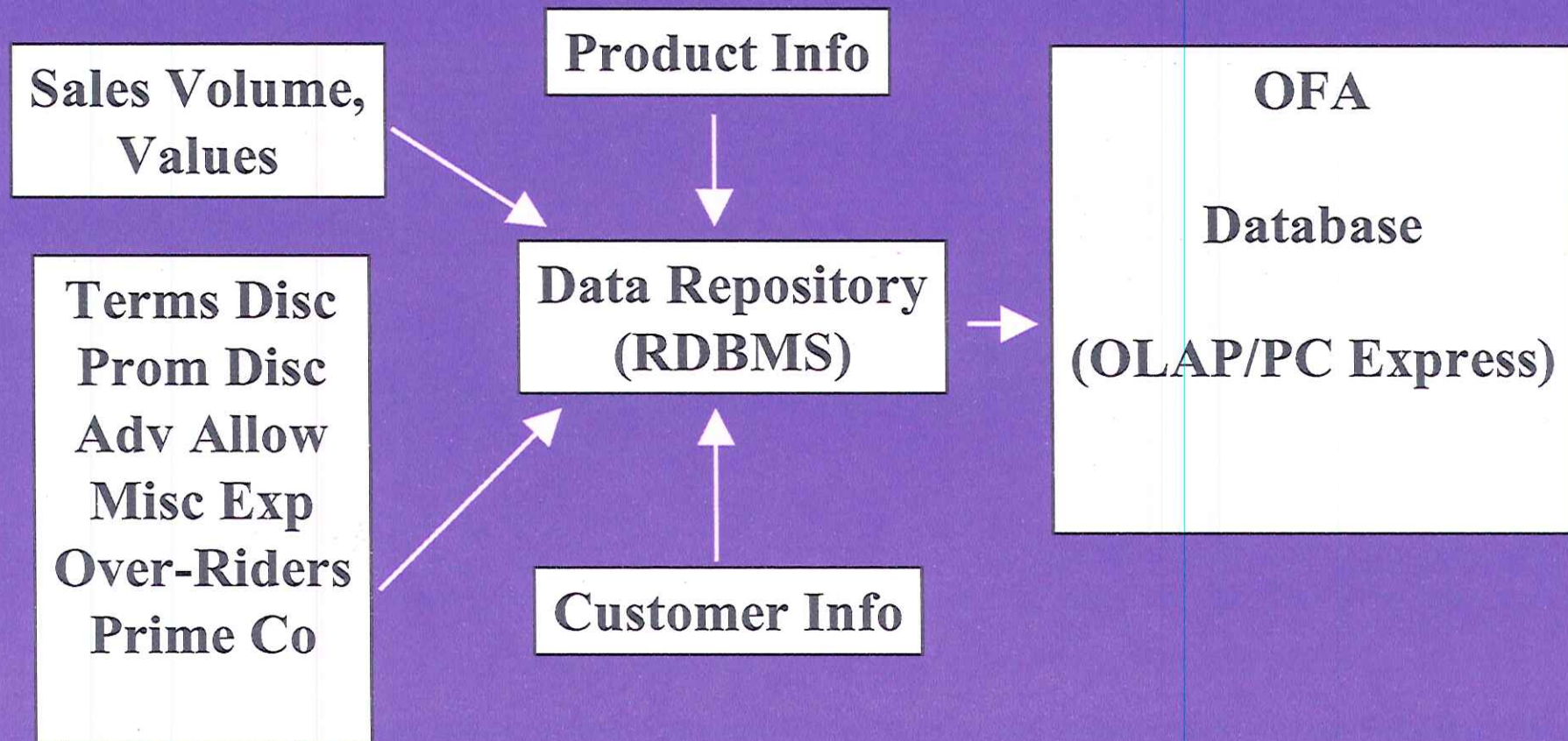
10-30



Scope for Massive  
Profit Variations

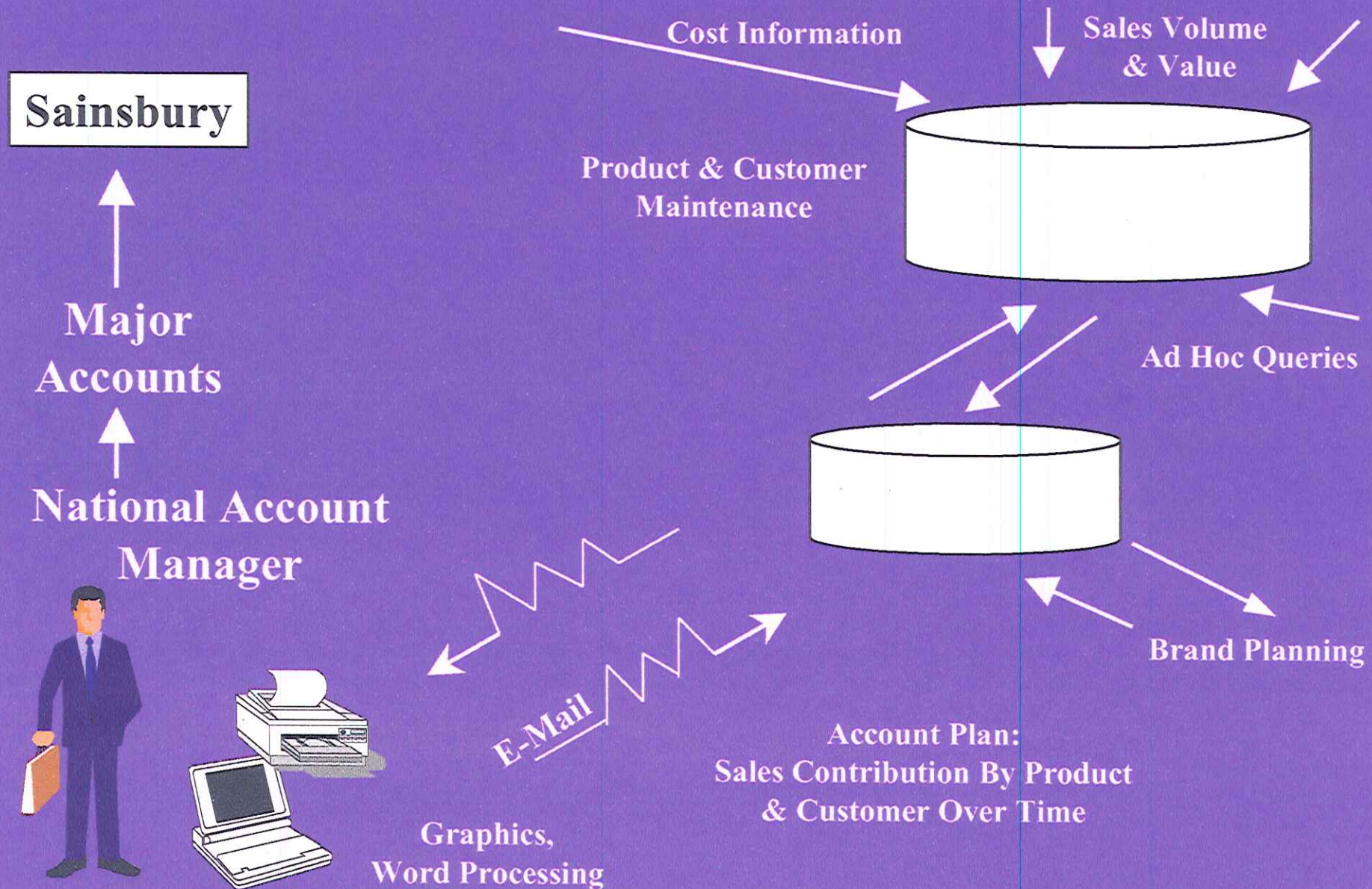


# Profit Management System (OFA)



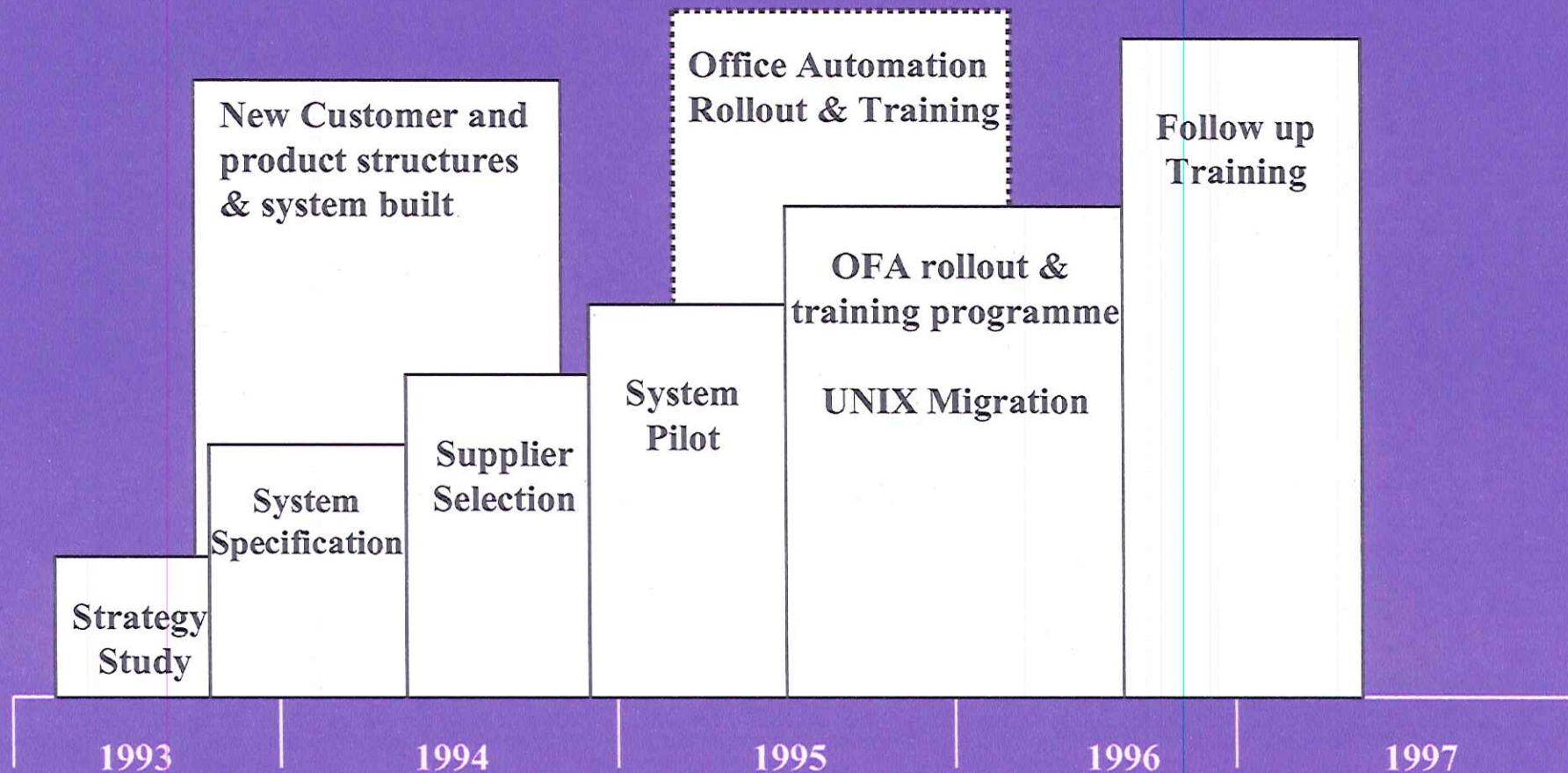


# National Account Communications Systems





# Profit Management (Oracle Financial Analyser) Project Phasing





# Profit Management Implementation Problems

- \* Data issues

- \* Full profitability figures not robust as some remaining cost feeds require further analysis (General Sales Force costs, Cost of Credit, Distribution).

- \* Software Faults

- \* Version 4,5 of OFA not robust and couldn't handle data volumes. Forced migration to 4.6.4 UNIX.



# Profit Management Implementation Problems

- \* Communications Instability
  - \* Initial use of e-mail for file transfer replaced by Landial. Now migration to package comms functions available in version 4.6.
- \* Education and Training
  - \* Overall step change, but some account managers still struggling.

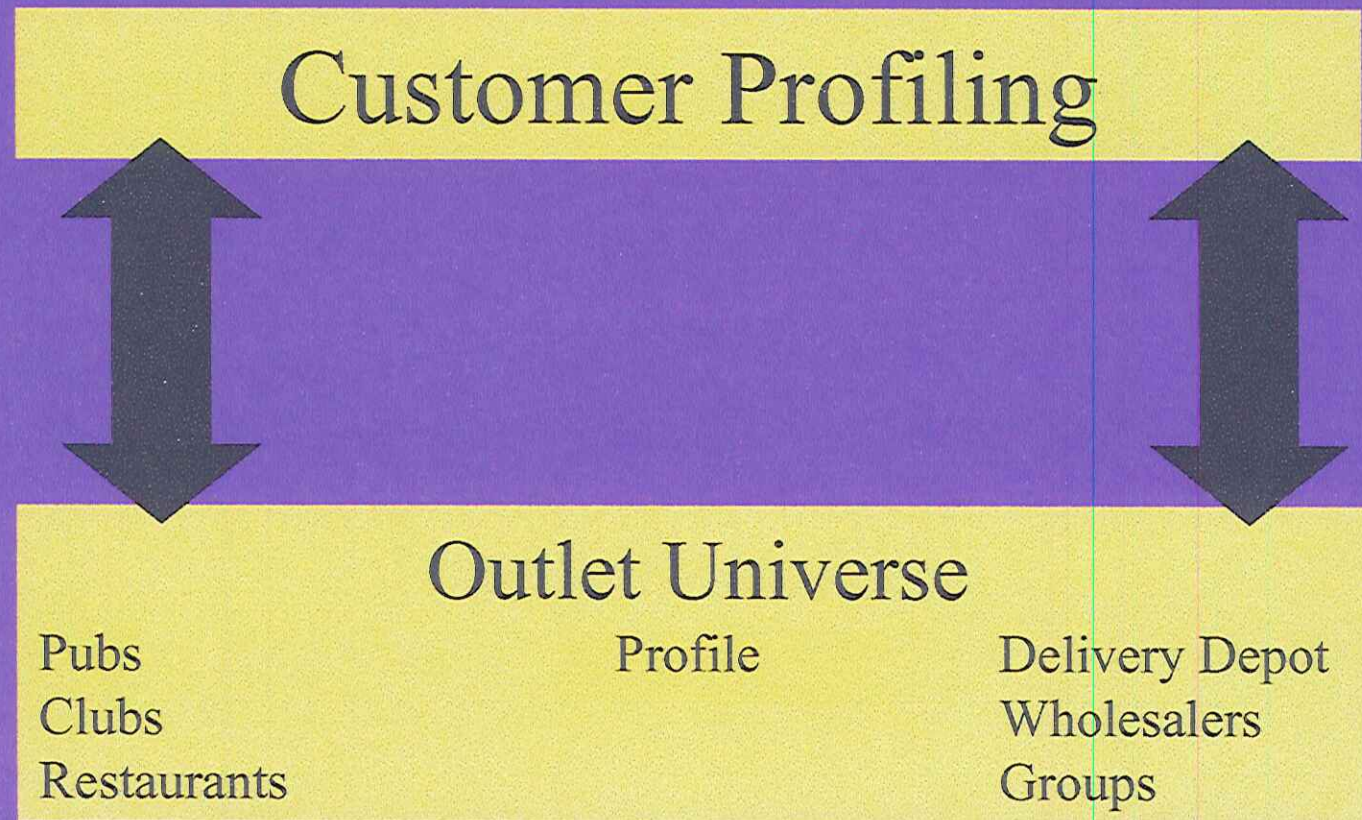


# OFA Project - Current Status

- \* 35 field based Account Managers and 15 Brand/Finance Managers at HQ.
- \* Volumetric reporting of top 60 customers.
- \* Cost Drivers identified - and the means to report them.
- \* Account and Brand planning and forecasting capabilities - in the field and at HQ.
- \* 4 data 'cubes' for account brand data - Budget, Actual, Forecast, Plan.

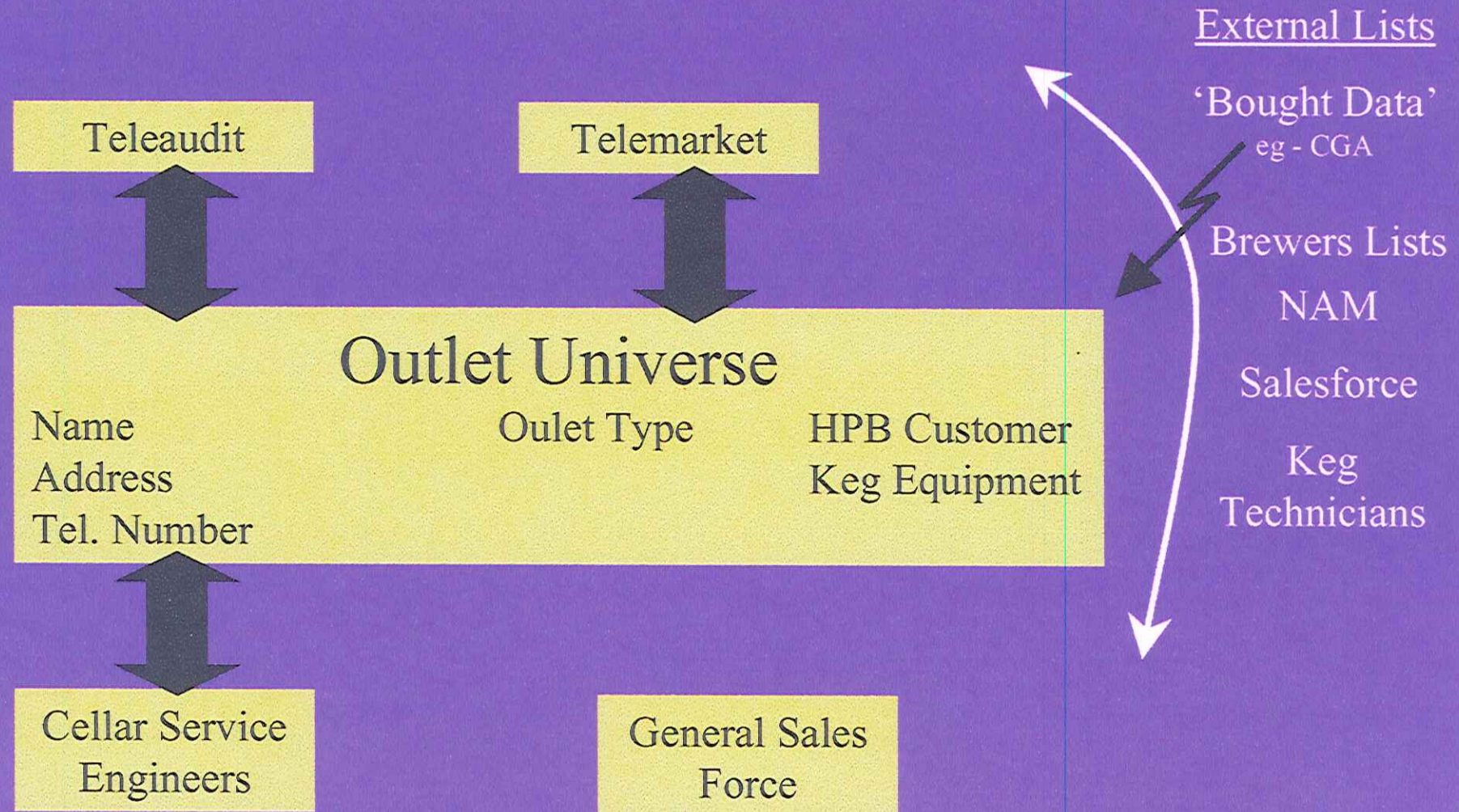


# Customer/Outlet Profile



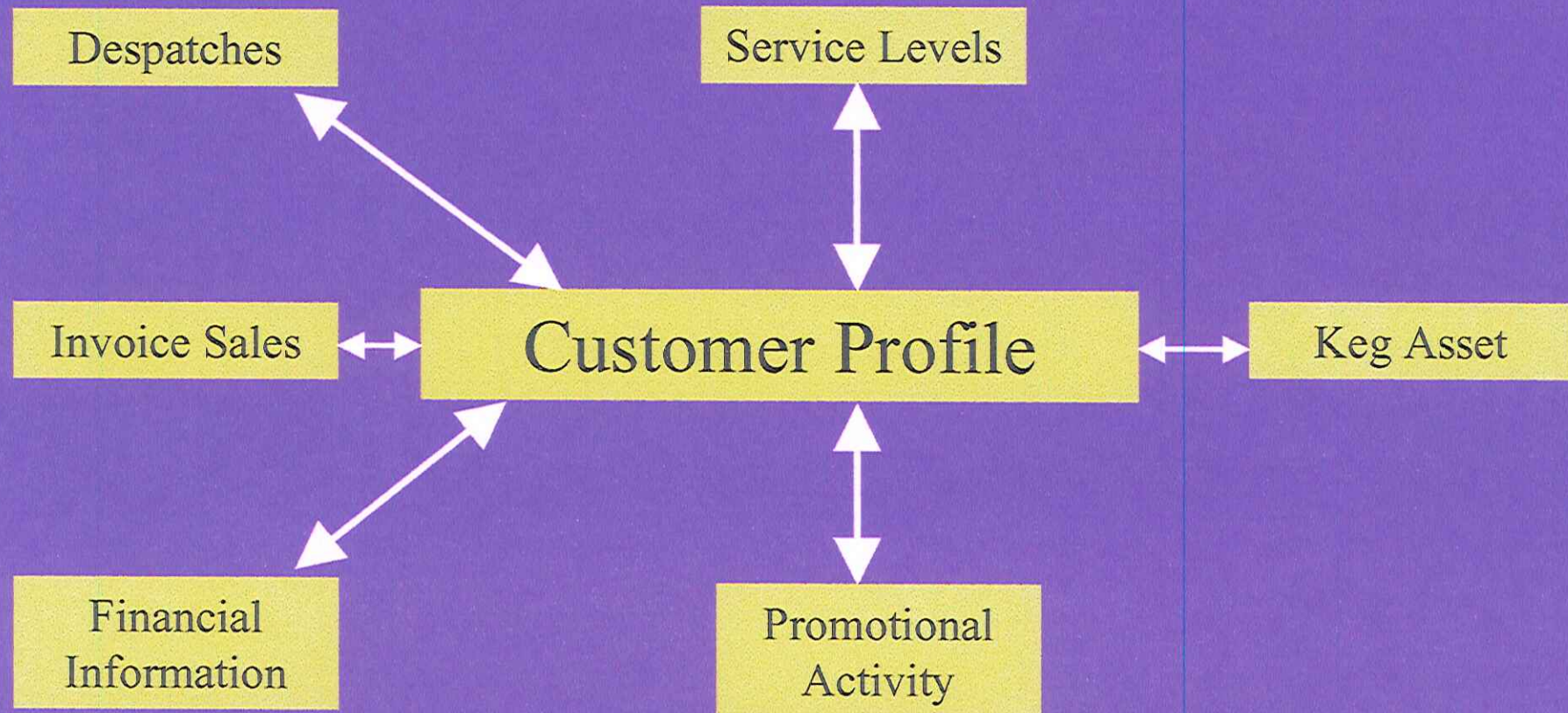


# Outlet Universe: Uses & Data Sources



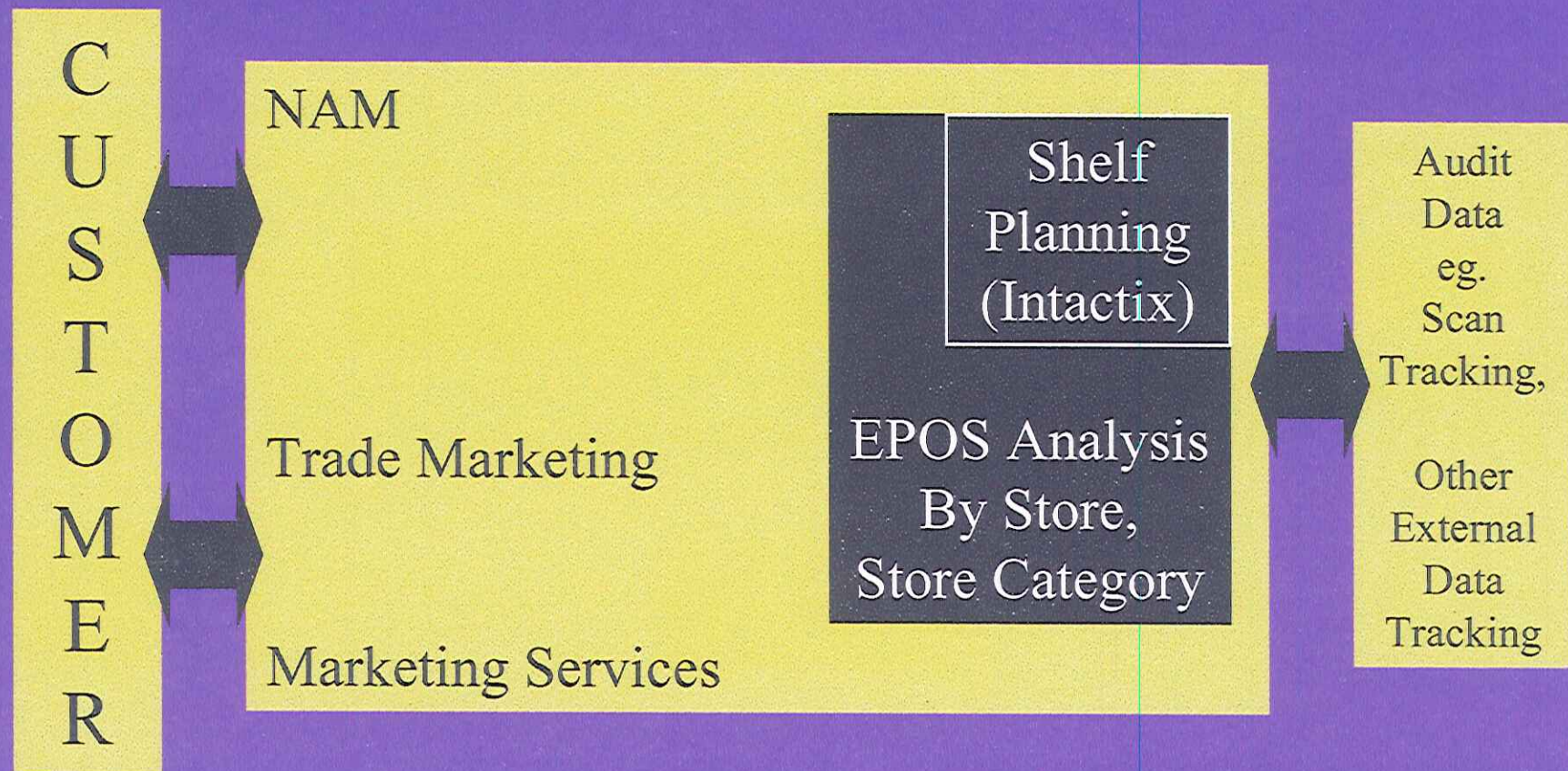


# Customer Profile



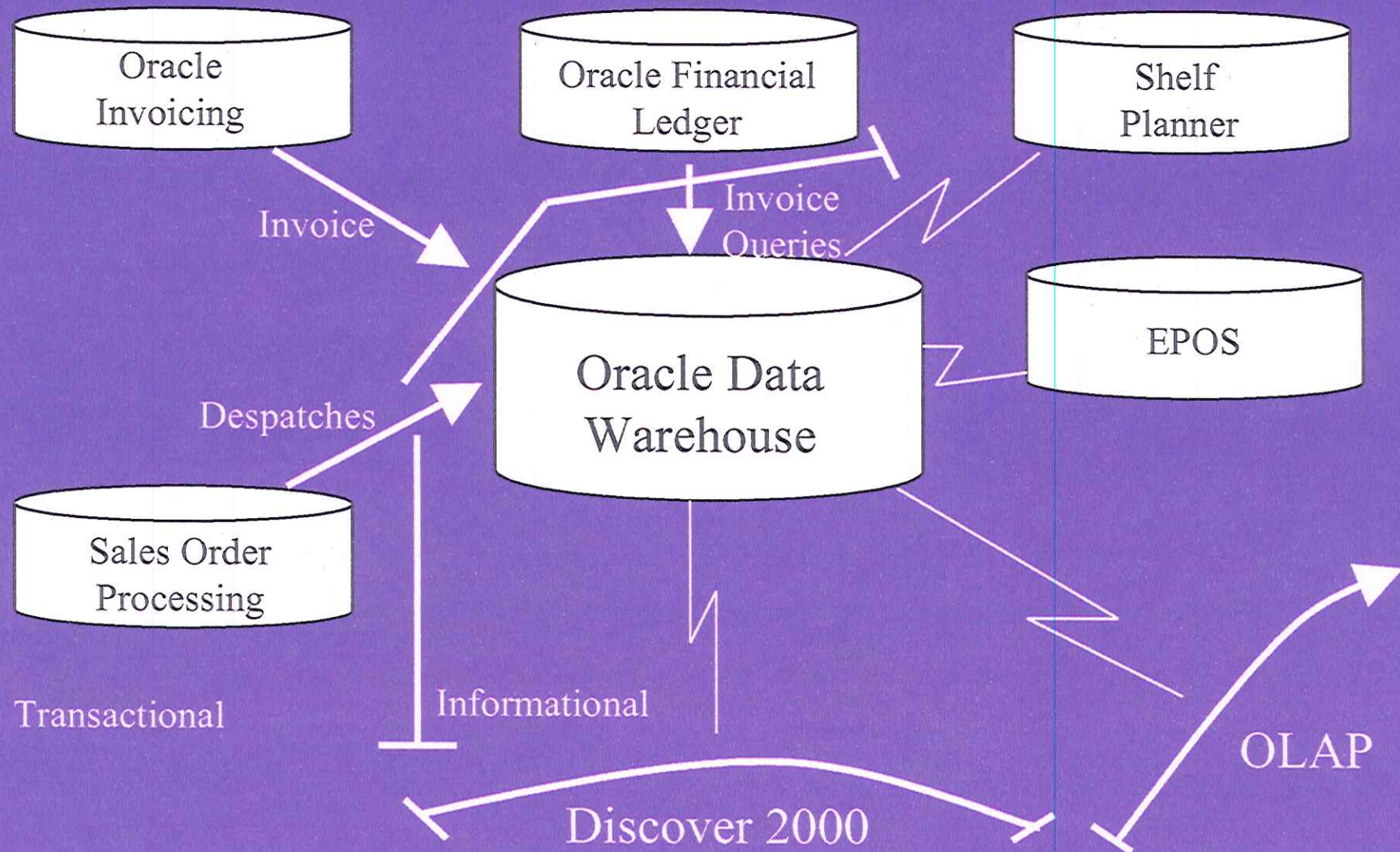


# Category Management - Customer/Bulmer/ Software Interface





# Data Warehouse/Category Management Software





# HPB Commercial Data Warehouse

Who uses it.....?

- \* National Account Manager.
- \* Trade Marketing Channel Managers.
- \* Market Services/Research.
- \* Brand Managers.
- \* Senior Company Decision Makers.



# Methodology

- \* Pilot.
- \* Refinement.
- \* Rollout.
- \* Learn From Pilot Lessons.



# Key Lessons - Data Warehouse

- \* Sort out and analyse Market Analysis requirements
  - \* Customer Hierarchies.
  - \* Product Hierarchies.
- \* Balancing act between
  - \* Too little information.
  - \* Too much information.
- \* Information from a suprising variety of sources.
- \* Constantly evolving - Building brick approach.



# Summary

- \* Exploits relational/OLAP/Enduser PC Technologies.
- \* Multi-Faceted.
- \* Integrated.
- \* Dynamic - Rapidly evolving.
- \* Widely accessible.
- \* Adding value in support of Bulmers leading the Cider Category!