

# Getting to Gemba with G&J Pepsi-Cola Bottlers

DIGITAL REPORT 2022



IN ASSOCIATION WITH:





# GETTING TO THE GEMBA WITH G&J PEPSI-COLA BOTTLERS







### G&J Pepsi-Cola Bottlers' Brian Balzer on the company's drive to give back to the community and vision to reach Gemba through technology and innovation

**F**ounded by two exceptional women, Nell Gross and Esther Jarson, G&J Pepsi is the largest family-owned and operated Pepsi franchise bottler. In 11 locations across Ohio and Kentucky, G&J Pepsi is a market leader, offering Pepsi-Cola, Mountain Dew, Dr Pepper, Tropicana Fruit Beverages, Starbuck's Frappuccinos and more.

Headquartered in Cincinnati, the company has ~1,600 employees working to serve the five million consumers in its market, spanning from central Ohio to Kentucky and over to West Virginia.

Brian Balzer, Executive VP of Digital Technology and Business Transformation, is proud to be part of G&J Pepsi and the communities it serves: "We are in the heart of blue-collar America in what we call 'the bible belt', an area of farmers, miners, manufacturers – hardworking Americans. We have some of the highest share markets in the country and the number one Mountain Dew market in the world. And I have got to tell you, this is Pepsi country!"

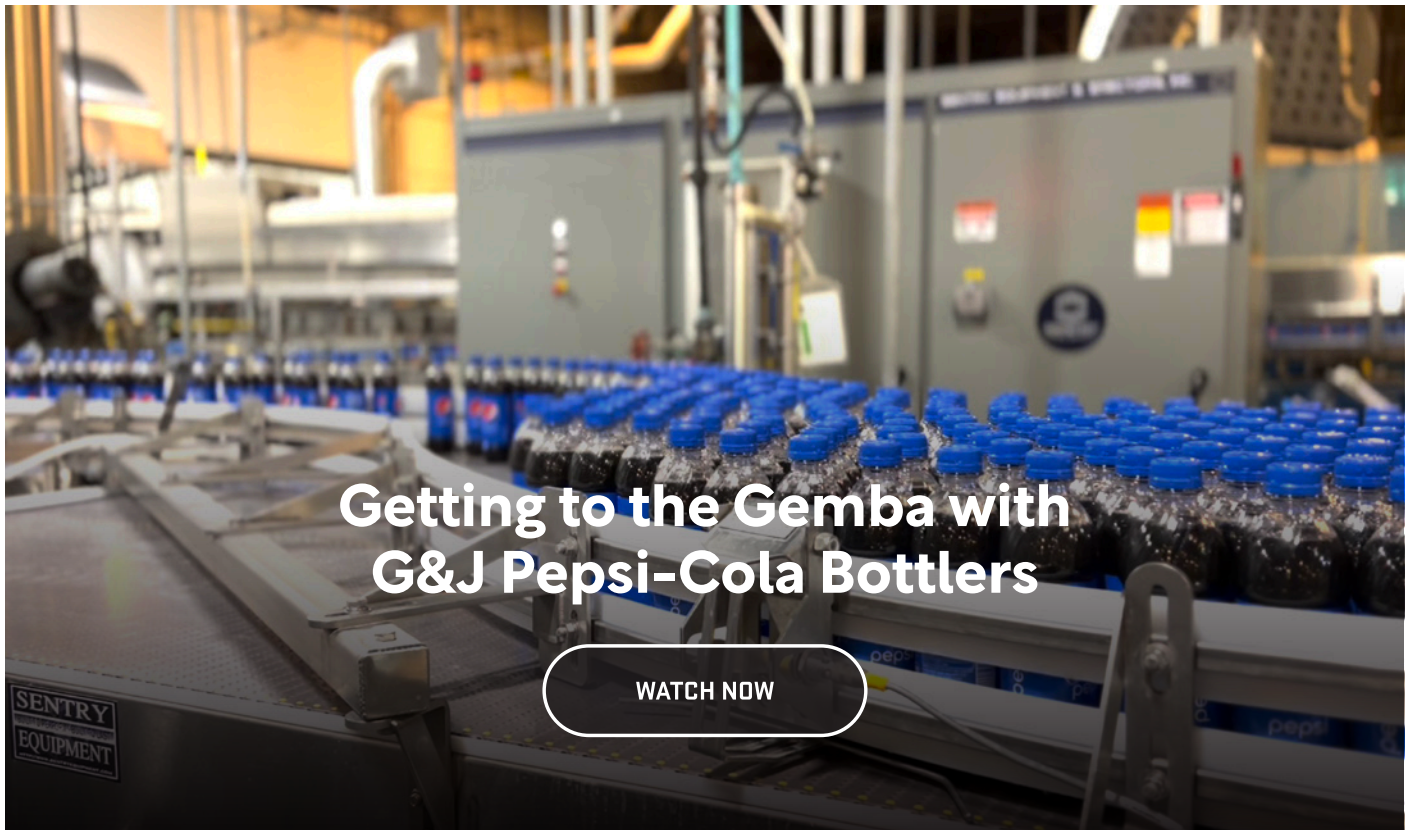
Not only is the community dedicated to G&J Pepsi and its products, but the company itself looks for ways to give back to those that have supported them and made them so successful. Balzer comments: "G&J Pepsi is a hard-working team that is deeply involved in our local communities. A couple of our slogans are "National Brands,











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Local Products” and “Nationally Great, Locally Even Better”, and we live by them. We invest in our local communities, volunteer here and are committed to supporting those around us. We donate thousands of hours and products to our local communities to support those around us in need every single year. It’s a huge part of who we are and why our communities support G&J Pepsi. It’s also why we have such long-tenured employees, where it’s not uncommon to celebrate people who have worked with us for 30, 35, and 40+ years.”

Working in the business and technology development section of the company, Balzer is responsible for strategically guiding

**“Using technology advancements and innovation has been a critical component of our transformation”**

**BRIAN BALZER**  
**VP, DIGITAL TECHNOLOGY & BUSINESS TRANSFORMATION,**  
**G&J PEPSI-COLA BOTTLERS**

the direction of the company and leading the transformation to outpace G&J Pepsi’s competitors. The executive also looks at ways technology can provide the best tools for the company’s workforce and bring real benefits to its customers – all of which is part of Balzer’s role leading G&J Pepsi’s transformation journey.

“The pace of technology change continues to escalate. Unfortunately, this pace of change will never be slower than it is today, and it’s our job to navigate that and bring to life those developments that will impact our business partners in the best way,” explains Balzer.

“Using technology advancements and innovation has been a critical component

of our transformation. We use technology as a competitive advantage in the marketplace and measure ourselves against peers and competitors,” he adds.

### Getting to Gemba

To begin this journey, Balzer looked at the importance of this change, analysing the business benefits, and then relayed this to his leadership team.

“This involved everything from building and implementing an ERP strategy by establishing a digital thread across all P&Ls of the business via Microsoft Dynamics 365, to establishing a data management strategy and using tools like PowerBI and Dataverse to bring business insights to our business partners, and even being 100% in the cloud by utilising SaaS solutions and the Microsoft Azure environment,” says Balzer.

He continues: “We now fully utilise the entire Microsoft ecosystem of tools: Microsoft Teams for collaboration, M365, Azure, D365 and the Power platform to bring about rapid development, solutions and RPAs to automate work that was once manual. At the heart of this journey, it’s about simplifying the application footprint, and using the native integrations of the Microsoft ecosystem, to create a digital thread connecting all areas of the business together in a unified manner. It improves maintenance, drives cost out and improves the user experience.”

With a lean technology team, G&J Pepsi has been able to quickly align itself with this strategy to combat the different challenges it faces. Balzer believes having this team front and centre lends itself to the success of the company’s strategy: “Some of the brightest and highest-paid people are in the tech industry. I don’t want the company spending dollars on using those resources

### BRIAN BALZER



TITLE: VP, DIGITAL TECHNOLOGY & BUSINESS TRANSFORMATION

INDUSTRY: CONSUMER GOODS

LOCATION: CINCINNATI US

 In his role as VP, Digital Technology & Business Transformation, Balzer is passionate about developing talent, leading transformation across all business areas, and using technology to advance the company.

In addition to this, he seeks to create value in numerous unique ways and simplify user experiences. He firmly believes in the benefits of collaboration, continually striving to improve, and generating a positive culture - in fact, they are the keys to G&J Pepsi's success as a team!

EXECUTIVE BIO





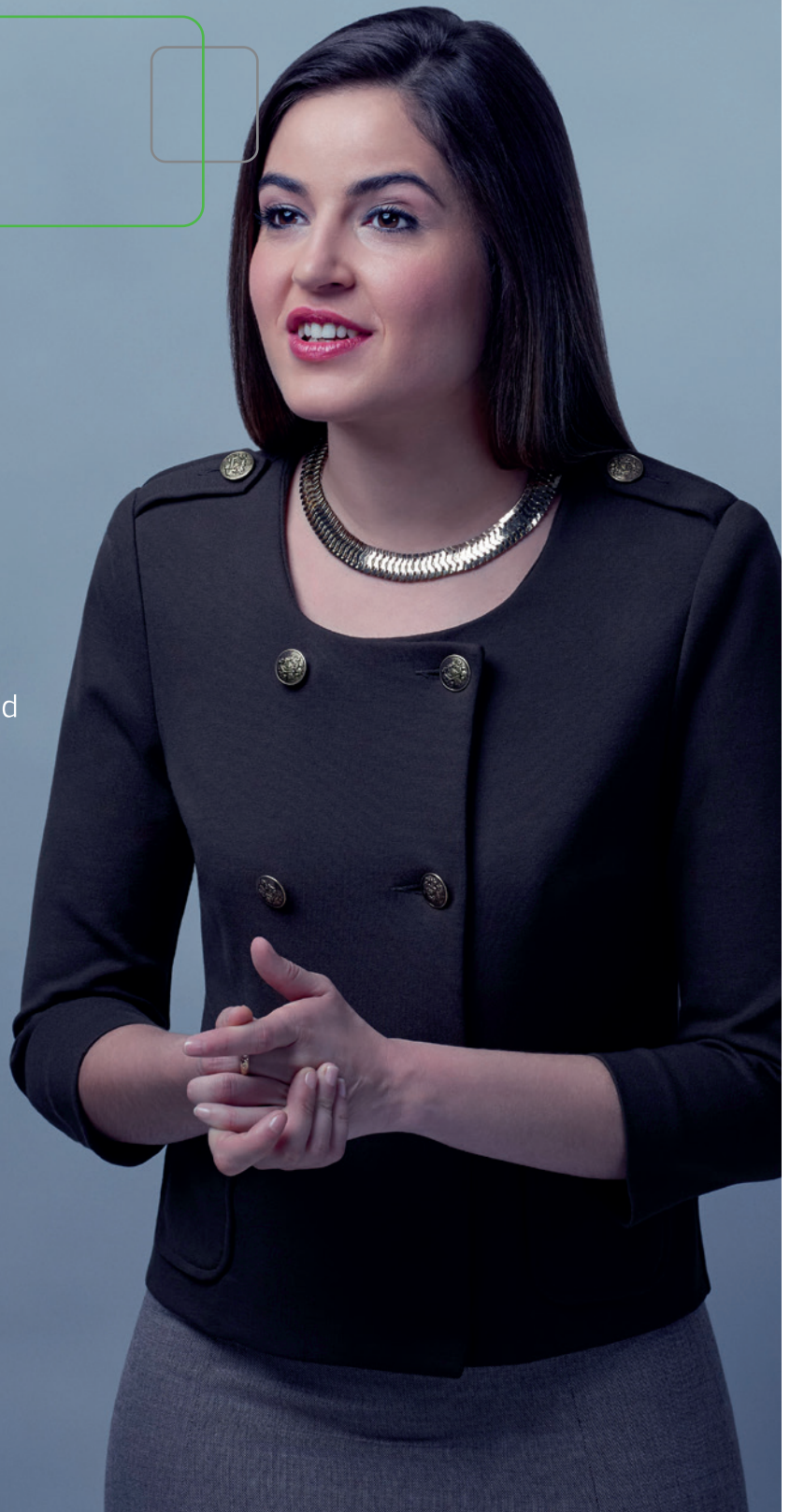


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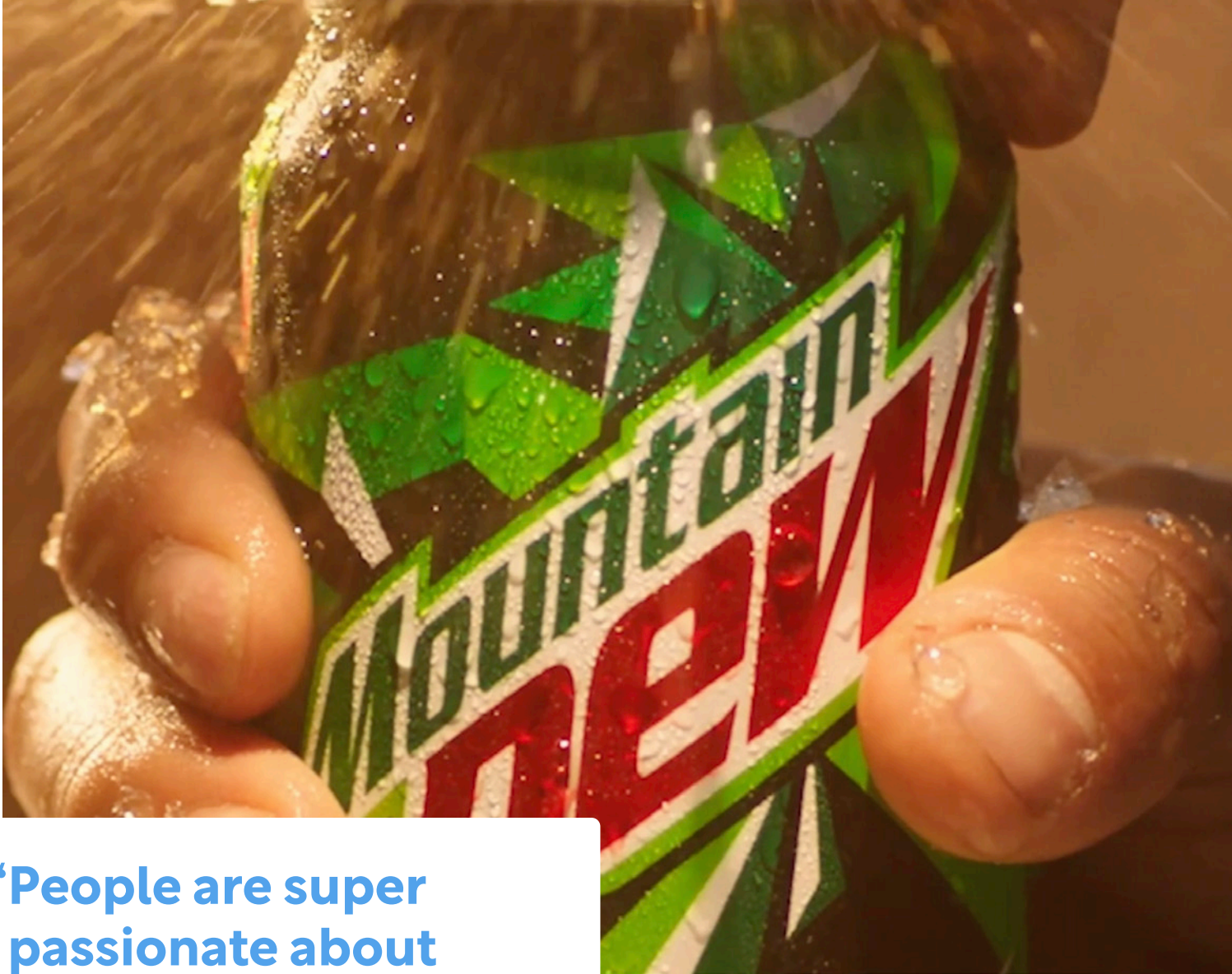
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**“People are super passionate about Pepsi, our brand, our products and delivering those products to consumers who also love our products”**

**BRIAN BALZER**

**VP, DIGITAL TECHNOLOGY &  
BUSINESS TRANSFORMATION,  
G&J PEPSI-COLA BOTTLERS**

for back-office IT. I want the business to spend dollars using those brilliant minds to solve business problems and bring about creative solutions to our workforce. That’s where we really began making progress in terms of digital transformation and bringing

value to G&J Pepsi. It’s exciting to see our strategy working.”

G&J Pepsi also has a unique philosophy when it comes to technology and digital transformation: the company wants to reach Gemba through technology. Gemba is a Kaizen Six Sigma Production Philosophy that emphasises the importance of leadership having a clear understanding of what is happening at every level.

“Getting to Gemba means, “getting to the real place”, the place where the problems are or where the work is done. It’s critically important that we never put a great technology on a bad process,” explains Balzer.

“So, pulling in our business partners up front to be a part of the solution is important. Before we deployed Dynamics 365 last year for our Sales and Service teams, we ran through over 150 different business









## G&J PEPSI-COLA BOTTLERS

processes and identified over 200 business problems. The business helped us lay these processes out and identify the issues they faced every day. We understood where rework takes place, where errors occur, where manual intervention is required and more. With the help of our business partners from the very beginning, they were on the hook for helping us develop a solution that met their needs. They were on the hook for creating success. And they were on the hook for bringing value to the rest of the organisation,” he continues.

G&J Pepsi had an Equipment Move Order process that took roughly 4 days and required manual entry of duplicative data across multiple systems. This was over 170K manual touchpoints annually, all error-prone due to human data entry.

After the Gemba sessions, Balzer states: “We were able to layout a new process and automate it within 45 seconds in Dynamics 365. Think about that. Work that once took 4 days, now takes 45 seconds!”

The G&J Pepsi On-Premise Sales teams were able to improve their market position by 4 share points and finished 2021 at a 450 index compared to the competition.

With this innovation and comprehensive strategy, Balzer reflects on how G&J Pepsi’s digital transformation journey has already started to provide its customers with real, tangible benefits: “We’re actively partnering with Microsoft to use Azure IoT in the field. We must deliver chilled juice products to our customers that must remain within a specific temperature range that is required by FDA regulations. We have deployed technology with sensors in the coolers that monitor temps, transmit that to Azure IoT and then allow us to monitor, report and alert a driver of potential issues. The technology means that we have reduced

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**“We need partners who are willing to bring us along, teach us and are a fit for the culture we use”**

**BRIAN BALZER**

**VP, DIGITAL TECHNOLOGY & BUSINESS TRANSFORMATION,  
G&J PEPSI-COLA BOTTLERS**

the number of issues with shipping and customers can be sure they will get our products at the quality they expect.”

Adding to this functionality, G&J Pepsi “developed a Microsoft PowerApp solution on the drivers' phones so they can report any issues and track temps in real-time, as well. To my knowledge, there’s nothing in the industry like this. We’ve built an entire DevOps, Data and ERP organisation





## G&J PEPSI-COLA BOTTLERS

specifically around the Microsoft ecosystem of tools and this is how it's changing our business”.

### **Collaborating with Microsoft and RSM to guarantee success**

With its philosophy revolving around reaching Gemba, partnerships are crucial to G&J Pepsi during the digital transformation of its operations. When selecting these partners, G&J Pepsi makes sure the companies have the right technical capabilities and talent on their teams to deliver solutions that meet the business needs.

As well as being technically compatible, Balzer explains that values are also crucial: “They need to be a good cultural fit, willing to collaborate with a G&J Pepsi technology team that is hands-on. We ultimately are responsible for supporting and developing on the platform based on the needs of our business partners. As such, we need partners who are willing to bring us along, teach us and are a fit for the culture we use. Culture is a critical component to our success as an organisation and those we bring in need to fit into it.”

“We have collaborated with fantastic partners like Microsoft and RSM to help us navigate our new innovations and utilise platforms to bring to market changes to our frontline workforce. One of the biggest initiatives we undertook was using the Microsoft PowerPlatform to innovate on. We were able to go to market very quickly in a Low Code/No Code environment with limited resources in a manner that enabled our business partners to do their jobs more efficiently with the apps we deployed on the platform,” he adds.

Now, G&J Pepsi can use these new tools and data to bring to light opportunities, demonstrating where they may have





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missed in sales and where they can profit the most with specific products in target markets or segments.

Having been with G&J Pepsi since the beginning of its transformation journey, Microsoft provides the company with its Power Platform and PowerApps, as it rolled out these capabilities in a beta environment.

“We’ve also partnered with Microsoft to help develop their AI capabilities within the platform and they have invested in us many times to bring about greater functionality like in their mobile Service tool. Microsoft is truly the underlying ecosystem that drives our digital strategy, our ERP strategy and enables our team to go to market with solutions quickly,” comments Balzer.

RSM – a leading provider of audit, tax and consulting services – assisted G&J Pepsi with the implementation of its D365 Sales and Service tools, a critical component to the company’s transformation. Balzer explains: “RSM’s expertise and partnership

were critical to the adoption of the solutions throughout G&J Pepsi. They brought about a unique strategy of working side-by-side with us and our business partners, receiving feedback, assisting us with developing functionality based on a streamlined process, instituting a Solution Verification process, and then iterating based on the feedback.”

With a sound partner network and a clear strategy to continue its transformation and ERP journey, G&J Pepsi is excited about the future. “It’s our job to build a native, integrated digital thread, connecting every facet of the company together,” concludes Balzer. 





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