

JUMEX:

INTEGRATED BUSINESS PLANNING TRANSFORMATION



The Challenge

Grupo Jumex stands as a market leader in Mexico's beverage industry. With its commitment to innovation and quality, the organization currently operates 12 production facilities and leverages 77 distribution centers with over 580 finished goods and 1600 raw materials to reach over 550,000 points of sale in Mexico and has expanded its footprint to 28 countries worldwide.

Jumex needed to transform its planning approach to better align with strategic objectives. The key challenge was implementing a comprehensive Integrated Business Planning (IBP) process that would break down departmental silos, foster cross-functional collaboration, and drive profitable growth through coordinated decision-making.

The Solution

The successful transformation was driven by several critical initiatives:

- **Executive Sponsorship:** The CEO personally championed the IBP implementation, setting clear expectations for C-suite involvement and establishing the necessary operational discipline.
- **Leadership Alignment:** All executives actively participated in the OW Proven Path Phase I (Leadership and Commitment), creating unified support for the transformation.
- **Structured Implementation Team:** Jumex established a dedicated core team structure—including executive sponsors, a steering committee, an IBP process leader, and functional owners—to drive change management and ensure successful adoption.
- **Methodology Adoption:** The company partnered with OW Consulting to implement the proven three-phase approach: Leadership, Transformation, and Ownership.

Salvi Folch (CEO): "The Integrated Business Planning implementation has exceeded our expectations. We've established a robust framework of meetings and processes that consistently deliver results. This disciplined planning approach has become fundamental to our operational excellence. I'm incredibly proud of what the team has accomplished."

The Results

- **Process Discipline:** Established consistent planning cadence with clear accountability across the organization.
- **Financial Integration:** Successfully incorporated financial perspective throughout all five planning steps.
- **Demand Ownership:** Created accountability within Sales and Marketing for forecasting accuracy across short, medium, and long-term horizons.
- **Portfolio Optimization:** Fully integrated innovation and product portfolio management within the planning framework.
- **Performance Improvements:** Achieved measurable gains in service levels, forecast accuracy, and portfolio management efficiency.

Miguel Autrique (COO): "I extend my sincere gratitude to everyone involved in our IBP implementation journey. Each team member has made meaningful contributions that collectively drove this project's success. It's remarkable to witness how IBP has transformed into the cornerstone of our business management approach."

Oliver Wight Americas

PO Box 368
New London, New Hampshire 03257, USA

T: 1.800.258.3862
askollie@oliverwight.com

www.oliverwight-americas.com

Oliver Wight
OLIVER WIGHT