Helen of Troy

Project Genesis Plus
Re-engineer data flows into Snowflake and enable self-service
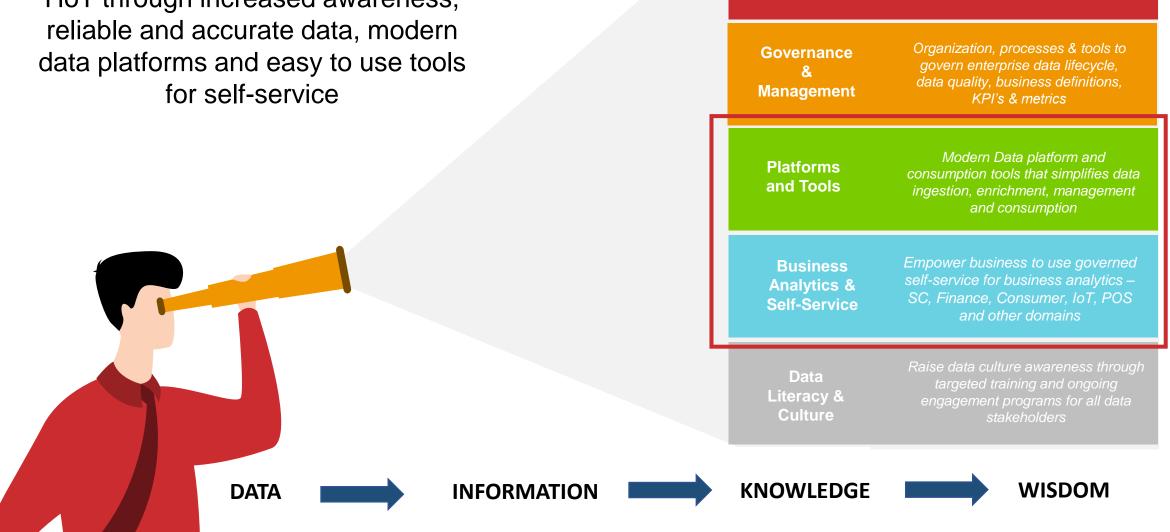
Project Kickoff Presentation

November 8, 2022

Project Genesis Plus - Agenda

- Data & Analytics – Vision & Strategic Priorities

- Project Background & Problem Statement

- Project Charter

- Project Team

- Solution Approach & Architecture

- Project Tracks

  - Data Domain Track Approach

  - Consumption & Self-Service Track Approach

- Schedule & Milestones

- **Appendix**

  - Project Management - Agile

  - Risk Management Process

  - Communication & Meetings Cadence

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Helen of Troy Data & Analytics – Vision & Strategic Priorities

Enable data driven decisions across HoT through increased awareness, reliable and accurate data, modern data platforms and easy to use tools for self-service

Strategy,& Operating Model	Business driven strategy & operating model to drive business value and innovation
Governance & Management	Organization, processes & tools to govern enterprise data lifecycle, data quality, business definitions, KPI's & metrics
Platforms and Tools	Modern Data platform and consumption tools that simplifies data ingestion, enrichment, management and consumption
Business Analytics & Self-Service	Empower business to use governed self-service for business analytics – SC, Finance, Consumer, IoT, POS and other domains
Data Literacy & Culture	Raise data culture awareness through targeted training and ongoing engagement programs for all data stakeholders
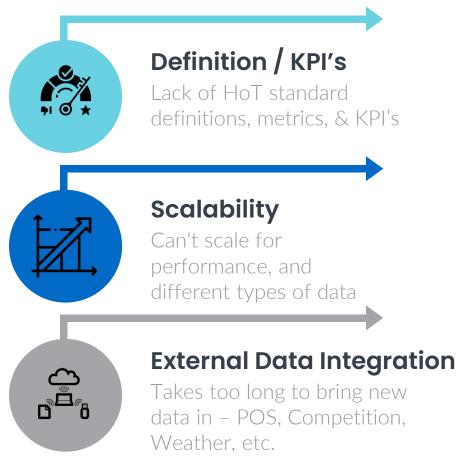
DATA → **INFORMATION** → **KNOWLEDGE** → **WISDOM**

Project Genesis Plus – Background & Problem Statement

The current Oracle Data Platform cannot fulfill our vision to enable data driven decisions at all levels and increase data maturity across Helen of Troy.

Self-Service Needs
Can't self-serve or use for Adhoc needs

Drill-down Capability
Cannot drill down to detailed level for decision making

Data Trust
Lack of Data Quality & ABC (Audit, Balance, Control)

Definition / KPI's
Lack of HoT standard definitions, metrics, & KPI's

Scalability
Can't scale for performance, and different types of data

External Data Integration
Takes too long to bring new data in – POS, Competition, Weather, etc.

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Project Genesis

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STATUS ●

Business Objective

Implement Snowflake as the next generation HoT Data Platform
Phase 1 - Replicate Oracle EDW into Snowflake
Genisus Plus - Rationalize, migrate, sunset Oracle EDW investments & enable self service

Executive Sponsor

Harish Ramani

Project Management

Gayle Isles
Rick Seiden

Business Stakeholders

+ All divisions, departments
+ Data Leadership Council Members

Project Team

+ Information Delivery Team – Sai, Venkat, Derek, Mel, Balaji
+ 3 Onsite Consultants
+ 10 Offshore Consultants

Executive Summary

Phase 1 – Replicate Oracle EDW into Snowflake - Live

- Workstream 1 – Data replication and data pipelines are completed
- Workstream 2 - UAT with ~175 business users is complete across EMEA, H&W, H&O, Beauty & SS
- Workstream 3 ETL tool selection, as well as phase 2 design, roadmap are complete
- We are live as of August and all reports and dashboard are driven from Snowflake

Genesis Plus- Migrate, sunset Oracle EDW & enable self-service

- Data Domain Track – Build new data pipelines from all HoT internal and external sources into Snowflake

- Consumption Models & Self-Service – Define HoT Level measures, metrics, business definitions, KPI's and implement in Snowflake for self-service consumption

Key Next Steps

- Legal approval, and sign-offs for products & services
- Interview team members
- Project Kick-off
- Genesis Plus Team Onboarding & team training
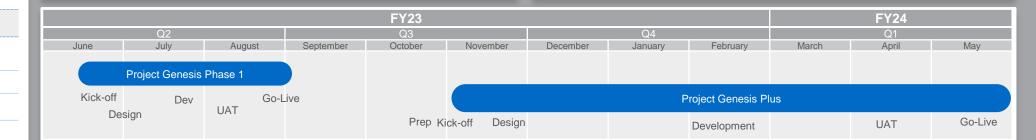- Design sign-off & Backlog Refinement

Key Risks / Issues & Resolution

RISK: Dependency on external resources
Mitigation: Interview each resource and use of multiple agencies

RISK: Budget needs in FY24
Mitigation: Completion dependent on appropriate budget allocations in FY24

FY23									FY24		
Q2			Q3			Q4			Q1		
June	July	August	September	October	November	December	January	February	March	April	May

Project Genesis Phase 1

Kick-off Design Dev UAT Go-Live

Project Genesis Plus

Prep Kick-off Design Development UAT Go-Live

Genesis Plus – Team/Org Structure

Business (BU / Shared Service)

Finance
Edgar Hernandez, Hugo Olivares, Kevin Richardson, Vincent Martinez

Orders To Cash
Alice Starliper, Lory Vasquez Monica Saenzpardo

Procure To Pay
Romeo Chen, Jerri Bossie Sherri Crawford, Edlyn Soler, Michelle Ortiz

Logistics
Cedric Turnage, Moises Corral, Tonya Oliver

Data Leadership Council
Eric Proctor, Mike Burke, Gerritt Dewitt, Mike Wallenfels, Kirsten Augustad, Chris Fluhr, Brad Higginbotham, Anil Johnson, Tracy Scheuerman, Harish Ramani, Craig Antolik, Paul DeSousa, Melissa Allred, Melissa Villalon, Aloke Mishra

User Acceptance Tester(s)
TBD

Engagement Sponsor
Harish Ramani

Steering Committee
Tracy Scheuerman, Aloke Mishra, Marisol Ayala, Matt Dunn, H&W - TBD, Craig Antolik, Harish Ramani, Anil Johnson, Balaji Srinivasan

PMO
Gayle Isles
Balaji Srinivasan
Sai Pedditi

Project Team

Project Manager / Scrum Master
Rick Seiden

Product Owner
Sai Pedditi
Balaji Srinivasan

Business Analysts

Mel Blizzard
Derek Spear

Architecture & Design

Aditya Gondesi
Pablo Marotta
Venkat Marakala

Data Engineering

Gurpreet Singh, Priyanka Meshram Vinod Kumar Venkat Marakala Pradhnya Shahu Open (2)

QA

Srinivas Maram
Neha Jain
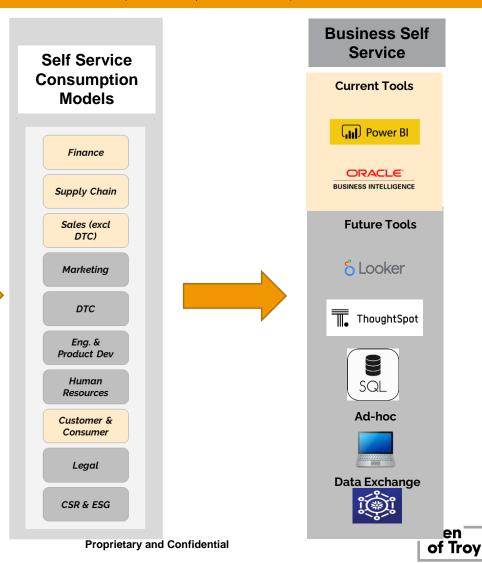
Report Developers

Shivaram Kolla
Lakshmi Narayana

Genesis Plus Architecture

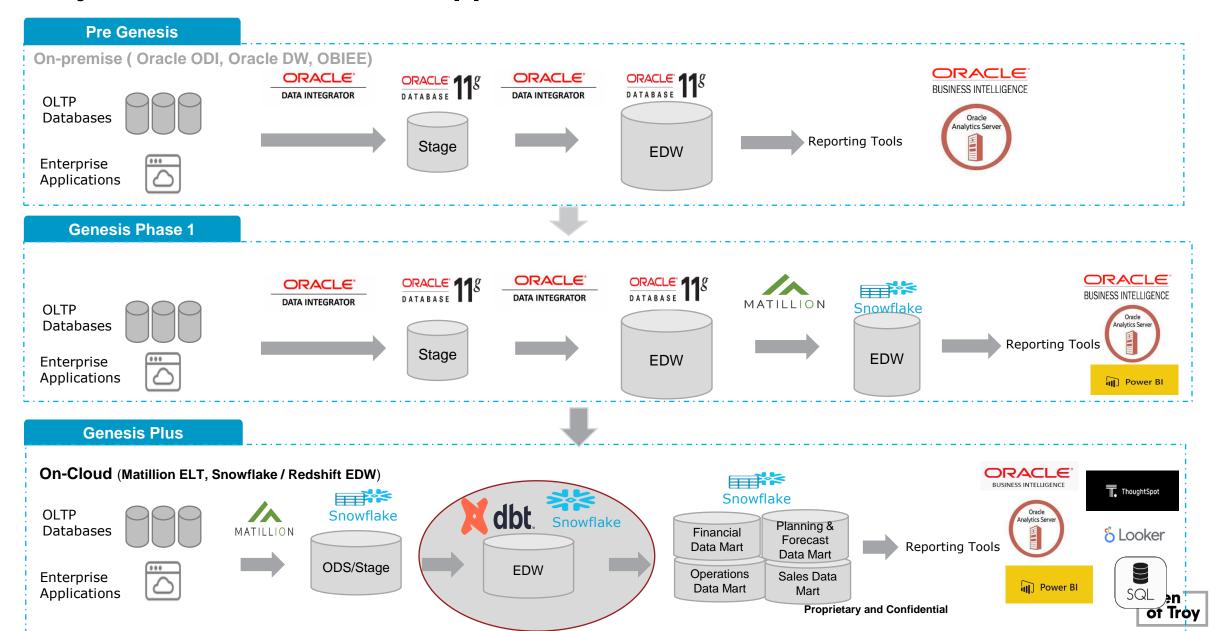**Data Domain Track -** Build new data pipelines from all HoT internal and external sources into Snowflake

Consumption & Self-Service Track – Define & implement measures, metrics, definitions, KPI's for self-service

Project Genesis – Snowflake Implementation

System Source | **Extraction & Loading** | **Transformation**

OLTP
- ORACLE E-BUSINESS SUITE
- ORACLE HYPERION
- nielsen
- salesforce
- SQL / ORACLE

Streaming

Files Sources
- JSON / XML / RAW

MATILLION

Recommended
kafka

Amazon S3

Snowpipe

AWS Airflow

Data Governance & Catalog — Recommended
- Alation
- Collibra
- IMMUTA

snowflake

Roles
- Loader
- Raw Admin
- Analytical Admin
- Transformer
- Reporter

RAW DB — **ANALYTICAL** — **SCHEMAS**
- Raw
- Stage
- Enhance
- Base
- Mart

dbt *Transformation*
Source control repository

dbt Dbt cloud — git

Features
- Version Management
- Scheduling
- Conflict Resolution

Data Sharing

Advanced Analytics

Data Marketplace

Data Science
- H2O.ai
- dataiku
- R
- python
- DataRobot

Self Service Consumption Models

- *Finance*
- *Supply Chain*
- *Sales (excl DTC)*
- *Marketing*
- *DTC*
- *Eng. & Product Dev*
- *Human Resources*
- *Customer & Consumer*
- *Legal*
- *CSR & ESG*

Business Self Service

Current Tools
- Power BI
- ORACLE BUSINESS INTELLIGENCE

Future Tools
- Looker
- ThoughtSpot
- SQL

Ad-hoc

Data Exchange

* **Represents currently available data & tools**

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Project Genesis - Solution Approach – Current State, Phase 1 and Phase 2

Pre Genesis

On-premise (Oracle ODI, Oracle DW, OBIEE)

OLTP Databases → Enterprise Applications → ORACLE DATA INTEGRATOR → ORACLE DATABASE 11g (Stage) → ORACLE DATA INTEGRATOR → ORACLE DATABASE 11g (EDW) → Reporting Tools → ORACLE BUSINESS INTELLIGENCE (Oracle Analytics Server)

Genesis Phase 1

OLTP Databases → Enterprise Applications → ORACLE DATA INTEGRATOR → ORACLE DATABASE 11g (Stage) → ORACLE DATA INTEGRATOR → ORACLE DATABASE 11g (EDW) → MATILLION → Snowflake (EDW) → Reporting Tools → ORACLE BUSINESS INTELLIGENCE (Oracle Analytics Server), Power BI

Genesis Plus

On-Cloud (Matillion ELT, Snowflake / Redshift EDW)

OLTP Databases → Enterprise Applications → MATILLION → Snowflake (ODS/Stage) → dbt Snowflake (EDW) → Snowflake (Financial Data Mart, Planning & Forecast Data Mart, Operations Data Mart, Sales Data Mart) → Reporting Tools → ORACLE BUSINESS INTELLIGENCE (Oracle Analytics Server), ThoughtSpot, Looker, Power BI, SQL

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Project Genesis - Solution Approach – Current State, Phase 1 and Phase 2

Pre Genesis

On-premise (Oracle ODI, Oracle DW, OBIEE)

OLTP Databases → Stage → EDW → Reporting Tools

Enterprise Applications

Genesis Plus

On-Cloud (Matillion ELT, Snowflake / Redshift EDW)

OLTP Databases → ODS/Stage → EDW → Financial Data Mart, Planning & Forecast Data Mart, Operations Data Mart, Sales Data Mart → Reporting Tools

Enterprise Applications

Snowflake / dbt / Snowflake

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Project Genesis Plus – Data Domain Track

All data flows that supports our enterprise Oracle BI and Power BI reporting are being reengineered during this phase, to ensure data accuracy, we need validation and testing of key enterprise reports and dashboards

Track Activities

- Requirements & Design
- Reengineer Data ingestion
- Build & Unit Test Data Pipeline
- Orchestrate Data Jobs
- User Acceptance Testing
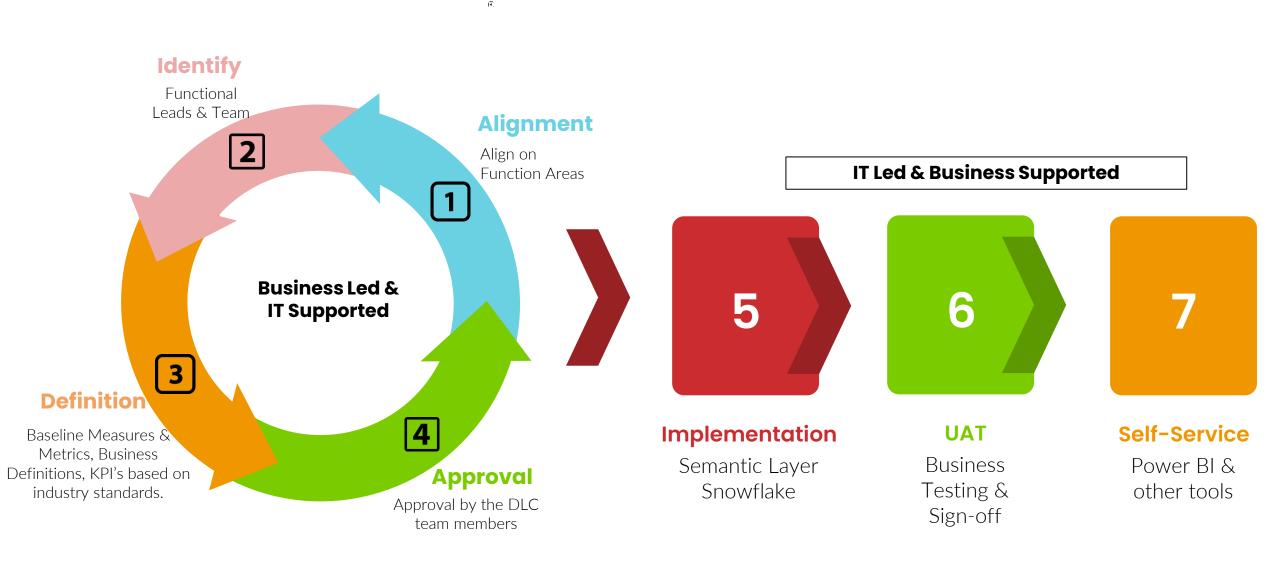- Documentation & Deployment

Data Domain Validation & Testing

Master Data
Product, Customer

Finance
AP, AR, GL, Accounting, Tax, Planning, Fixed Assets etc.

Orders to Cash
Order Management, CRM, Sales Operations, EDI etc.

Procure to Pay
Supply Planning, Demand Planning, Procurement

Logistics
Sourcing, Distribution, Transportation

Genesis Plus – Data Domain Track Monthly UAT Approach

Identify UAT Testers → Communicate Testing Timelines to Testers → Domain Users Commence Testing → Domain Users Report Any Bugs → Bugs Addressed → Domain Users Tests Again → Domain User Sign-off
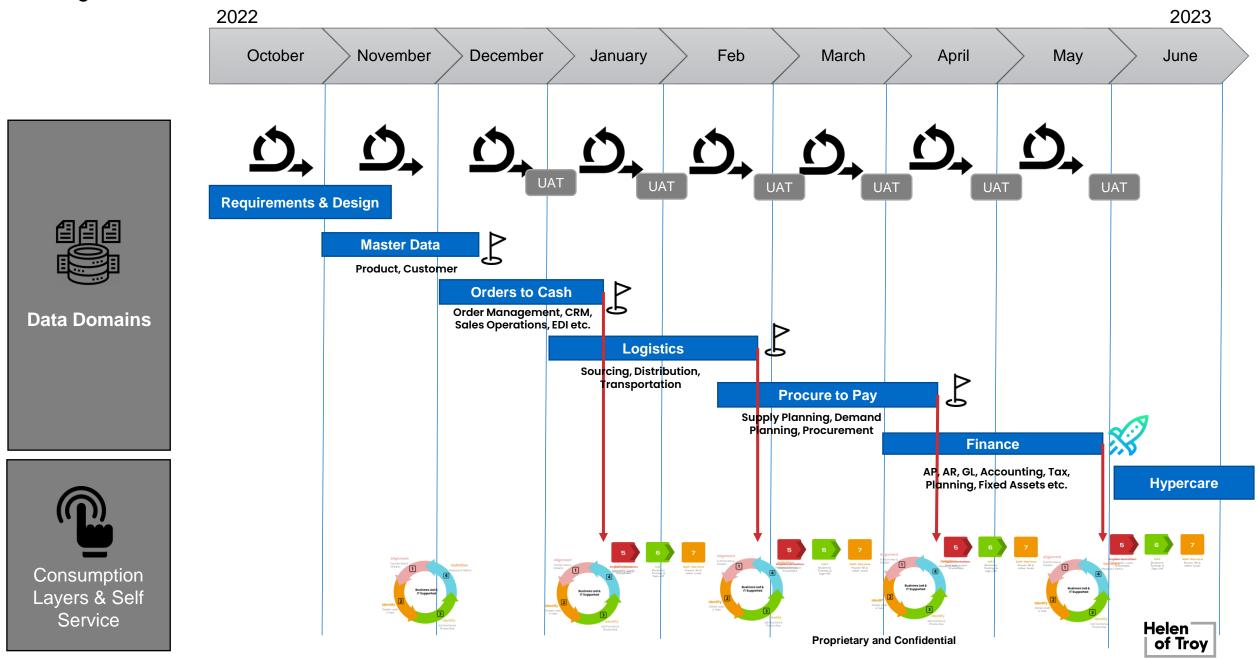
Monthly UAT Approach

- ✓ ~330 total reports will be tested, monthly breakdown TBD
- ✓ ~85 UAT users are expected, monthly breakdown TBD
- ✓ Testers will identified & given three-week lead time to start testing
- ✓ Monthly UAT will typically last one week
- ✓ We expect about two hours of testing each month for each tester
- ✓ Monthly UAT starts in Dec and ends in May
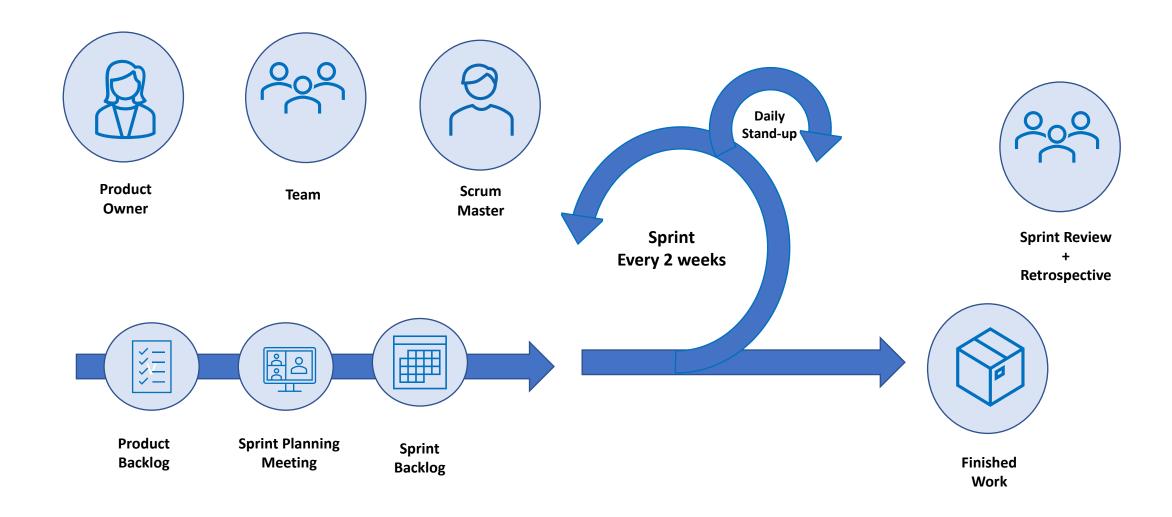
Consumption Models & Self-Service Approach

Identify
Functional Leads & Team

2

Alignment
Align on Function Areas

1

Business Led & IT Supported

3

Definition
Baseline Measures & Metrics, Business Definitions, KPI's based on industry standards.

4

Approval
Approval by the DLC team members

IT Led & Business Supported

5

Implementation
Semantic Layer Snowflake

6

UAT
Business Testing & Sign-off

7

Self-Service
Power BI & other tools

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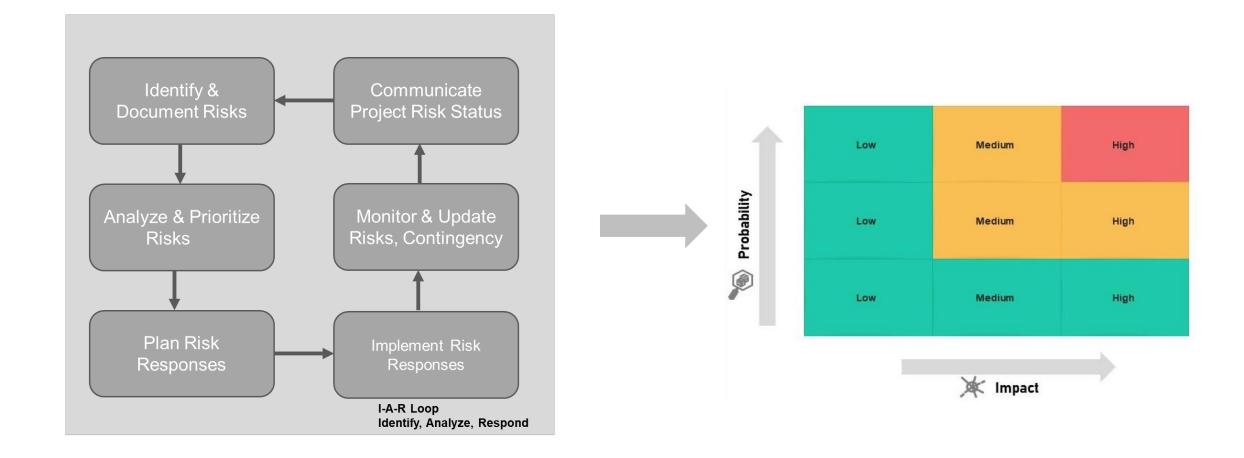
Project Genesis Plus – Schedule & Milestones

Appendix

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Genesis Plus – Agile Project Methodology

Genesis Plus - Risk Management Process

Genesis Plus – Communication & Meetings Cadence

Meeting	Timing	Duration	Purpose	Audience
Project Kick-Off	Day One	2 Hours	Align stakeholders and Project Team	Helen of Troy Business Stakeholders
Project Status Meeting	Monthly	30 Minutes	Updates on tasks and project status	Helen of Troy Stakeholders
Daily Standup	Daily	15 Minutes	Ensure progress is trending towards completing the committed work	Identified Helen of Troy contributors (optional)
Risk Management Meeting	Weekly	30 Minutes	Identify Risks, Categorize Risk, Mitigation Plan	Project Team, Helen of Troy Stakeholders
Sprint Retrospective	Bi-weekly	30 Minutes	Openly discuss the sprint and areas of improvement for upcoming sprints	Identified Helen of Troy contributors (optional)
Exec Steering Readouts	Monthly	~60 Minutes	Share findings and demonstrate features as part of delivery	Helen of Troy Stakeholders and general business

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Thank You!

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