

pomerol

Accelerating ERP Migration with AI- Driven Data Cleansing

A North American manufacturer and distributor of funeral and memorialization products consolidated six months of migration risk into a living master data foundation—delivering a single, trusted view of every client and product before moving from SYSPRO to Epicor.



"The Pomerol solution fixed decades of bad data in weeks. This put our Epicor rollout in great shape before it started. Our business stewards now have the tools to own the data story." – CIO, Leading Manufacturer/Supplier of Funeral & Memorialization Products

140 years of heritage meet modern data challenges

Founded in 1880, our client is the world's largest supplier of burial vaults and cremation products, serving 22,000+ funeral homes from its North America headquarters. Rapid growth, acquisitions and multiple SYSPRO instances left the company with thousands of inconsistent client and product records, duplicated across ERP and Dynamics CRM. Manual mapping could not keep pace, putting the Epicor migration—and future analytics strategy—at risk.

ERP chaos undermines data confidence

- Same customer spelled differently in every ERP instance.
- No systematic link between ERP and CRM accounts.
- Historical "one-off" Excel mappings scattered across the business.
- 3–6-month deadline to clean data or delay Epicor cut-over.

Resolving entities with Machine Learning

In just four weeks, Pomerol built an Azure ML entity-resolution model, raising F1 from 70 to 92 while boosting recall to 95 percent. The breakthrough came through intensive manual labeling sessions with the client's domain experts, who provided critical business context about customer relationships and product hierarchies that pure algorithmic approaches had missed.

Low-, medium- and high-confidence clusters were surfaced in Power BI, letting business users quantify revenue exposure and focus stewardship where it mattered most. The model intelligently incorporated historical sales patterns and industry-specific naming conventions to identify subtle connections between seemingly disparate records. High-confidence clusters represented clear matches that could be auto-approved, while medium-confidence clusters highlighted cases where small variations in spelling or formatting masked legitimate connections.

Solution Overview

Industry:

Funeral Services / Manufacturing

Geography:

North America, Midwest

Function:

Technology & Data

Business Value Drivers:

Migration Readiness, Data Quality, Analytics Foundation

Challenges:

- Multi-Instance ERP Duplicates
- ERP - CRM Disconnect
- Manual Excel Mappings

Solutions:

- Azure ML Entity-Resolution
- Confidence Clustering
- Fabric SQL DW Write-back
- Integrated Power BI & Power Apps Stewardship

Results and Impacts:

- F1 raised from 70 to 92
- Precision raised from 79 to 90
- Accuracy raised from 72 to 94
- First working platform in 3 months
- Fully refined platform in 5 months
- Ongoing self-improving MDM loop

Building a living stewardship loop

A Power Apps workflow enables data stewards to approve, correct or flag mappings directly from the same Power BI view, creating an integrated decision-making environment where users never need to context-switch between systems. The interface presents each potential match with rich contextual information—sales history, geographic data, and transaction patterns—empowering stewards to make informed decisions quickly and confidently.

Decisions write back to Microsoft Fabric SQL DW in real time, refreshing reports instantly and feeding the ML model for continuous retraining—turning every steward action into better future accuracy. This feedback loop creates a virtuous cycle where human expertise continuously improves machine performance. As stewards validate matches or reject false positives, the model learns and adapts, becoming increasingly sophisticated in its understanding of the client's unique business context.

From project rescue to enterprise data platform

What began as a tactical fix now underpins the client's medallion architecture for analytics and future cloud modernization. The master data management solution has evolved beyond its original ERP migration mandate to become the cornerstone of their data strategy, providing a single source of truth that spans customer

relationships, product catalogs, and operational metrics.

With trusted, stewarded master data streaming into Fabric and Epicor, the company can pursue predictive sales insights, customer 360 and supply-chain optimization—confident that its 140-year reputation is built on clean, connected data. The platform's real-time capabilities enable dynamic customer segmentation, allowing our client to identify emerging market opportunities and respond to changing funeral industry trends with unprecedented agility. The self-learning nature of the system means data quality improves over time rather than degrading—a fundamental shift from traditional master data management approaches

