



## The 'No Frills' Upgrade

To 9.0 in No Time

### Client Background

Global transportation equipment lesser XTRA Corporation operates a diverse fleet of over-the-road trailers, intermodal trailers and intermodal equipment. Its XTRA Lease division provides rental, lease, and lease/purchase packages and operates a fleet of nearly 125,000 trailers, including dry vans, flat beds, reefers, specialty equipment, over-the-road trailers, intermodal trailers, domestic containers, and chassis for container transport. The company has over \$475M in annual revenue and operates through about 90 locations in the US, Mexico, and Canada. Clients include railroads, shipping lines, and trucking companies worldwide. XTRA is a subsidiary of investor Warren Buffett's Berkshire Hathaway.

### Project Background

XTRA Corporation was running two separate financial systems, one for GL/AP/AM and another for AR/BI. Each system was on a different release of PeopleSoft. The AR instance in particular was highly customized, expensive to maintain and was proving difficult to upgrade.

The client's goal was to get to a single, integrated financial system running all five modules. In addition, they wanted to take advantage of new functionality and eliminate as many customizations as possible. XTRA Corporation learned about the BTRG 'No Frills Upgrade and became intrigued.

Upgrading the GL/AP/AM environment to the version 9.0 was the first step to achieving XTRA's goals. The functional and technical staff responsible for supporting the GL/AP/AM environment was very knowledgeable. Furthermore, they performed an initial fit gap which provided BTRG with a starting point for its analysis.



In addition, documentation and training were up to date and required minimal updates, most of which were completed by XTRA staff. XTRA was looking to BTRG for the real value-add expertise and services including:

- ◆ In-depth 9.0 knowledge that would enable the reduction of customizations
- ◆ Technical development and upgrade experience
- ◆ Database platform (Informix) experience
- ◆ Proven results and methodologies that would ensure a quick, efficient upgrade with a minimal impact on business operations.

### What is a 'No Frills' Upgrade?

BTRG has developed an upgrade methodology that enables us to deliver upgrades according to short timelines and tight budgets. We affectionately refer to it as the 'No Frills Upgrade'.

We use the BTRG Upgrade Toolkit and project management methodologies to streamline the fit/gap sessions, reduce the number of required passes and keep the project on track.

A 'No Frills' Upgrade is ideal for organizations who want to eliminate customizations and stay as close to vanilla as possible. Not only does this shorten the entire process, but there's less end-user training and the disruption to business operations is minimal.

The best part is that they frequently cost about \$250-450K and can be completed in 3-4 months. An initial discovery meeting is available for us to assess your current installation.

**“...a non-event...  
...post go-live was anti-climactic..”**

Is this how you would describe your last upgrade experience? If not, choosing BTRG’s ‘No Frills’ Upgrade could be the solution that gives your organization a smooth transition to 9.0.

One of the most satisfying comments BTRG staff heard from the client after the upgrade was that *“it was almost a non-event”* and *“post go-live was almost anti-climactic”* since there were so few problems encountered!

Not only does the ‘No Frills’ Upgrade significantly reduce the operational impact an upgrade can have on your organization, but it’s cost effective. The initially proposed timeline was 15 weeks. At the client’s request, it was extended to 21 weeks so that BTRG consultants could provide production support. However, even with the extended timeline BTRG came in under budget.

**■ Non-event? Anti-climactic? Under budget? How?**

**■ Making it Possible**

What makes the ‘No Frills’ Upgrade possible is a combination of skills and experience unique to BTRG.

BTRG resources require very little if any direction. Each BTRG consultant averages 10-12 years of PeopleSoft experience. Our technical and DBA resources are highly skilled and very experienced in performing

As a result, your staff can focus on managing day-to-day operations while leaving the upgrade responsibilities in the capable hands of experts who routinely work with the upgrade toolsets. Our functional resources will work with your team to provide insight into the latest functionality and guide you through the process of reducing customizations.



BTRG also brings the ‘BTRG toolkit’ to every ‘No Frills’ Upgrade. The ‘BTRG Toolkit’ is a proprietary set of templates and tools that help walk clients through the decision making processes in a structured, step-by-step process. Our toolkit will facilitate the discovery of valuable insights into new ways of doing things. In addition, the entire upgrade process proceeds in a documented, organized manner.

For more information about BTRG or our ‘No Frills’ Upgrade, contact us at **877-287-4462** or [nofrills@btrgroup.com](mailto:nofrills@btrgroup.com).

You can also visit us online at [www.btrgroup.com](http://www.btrgroup.com)