

## Solution Spotlight: PeopleSoft Upgrade Analysis

### Your first step towards a smart upgrade

Organizations struggle to strike the right balance between regularly upgrading their PeopleSoft systems and minimizing the cost and disruption an upgrade will bring. At what point will the benefits of net-new functionality justify the cost? Which customizations can we retire?

As a result, IT managers are routinely challenged by senior management to justify the need to upgrade making technical upgrades more difficult for systems owners and IT managers to justify. However, combining a technical upgrade with the deployment of some of the latest best-practice functionality can provide the value-add that will justify the time and expense of the project.

**BTRG's PeopleSoft Upgrade Analysis** provides a methodology to quickly and effectively assess your PeopleSoft system. In doing so, we'll help you build the business case and roadmap to get you to the latest version so that you can make an informed decision about whether or not to do so in the first place. A few of the leading reasons to upgrade include:

- ◆ **PeopleSoft 9.0 new functionality and business process improvements can drive new levels of efficiency. We'll identify and quantify the potential savings.**
- ◆ **Upgrading can facilitate or ensure regulatory compliance. We'll identify unnecessary customizations .**
- ◆ **Upgrading enables you to stay eligible for the highest levels of product support. BTRG's PeopleSoft Upgrade Analysis can help you determine the costs and risks to your organization if you fall behind.**



### Upgrade Effectively

Four key areas will drive upgrade effectiveness. They are:



#### Benefits

Where's the benefit from new or additional functionality?



#### People

What resources will need to be involved and what will the impact be on people within the organization?



#### Process

Where are the opportunities to improve business critical processes?



#### Budget

How much will it cost based on your current landscape?

## ■ What do you get out of the Analysis?

### Deliverables proven to facilitate decision-making:



A comprehensive understanding of the new functionality your organization can leverage



An analysis of your customizations and recommendations on which to sunset



A high level plan for the upgrade including costs, level of effort estimates, resourcing requirements, and a timeline

Our analysis will not only provide an informed business case on whether or not it makes sense to upgrade, but it will also establish the foundation for your risk management plan, long term upgrade strategy, and project schedule.

## ■ How does BTRG's PeopleSoft Upgrade Analysis work?

Using a proprietary, pre-built, analysis of PeopleSoft 9.0 which we tailor to the modules that you have deployed; we conduct a series of structured workshops involving key members of your organization and ours. In these meetings we will assess:

- ◆ The current state of your PeopleSoft environment
- ◆ Opportunities for business process improvement
- ◆ Your internal resources available to complete the upgrade
  - ◆ Customizations that can be eliminated
  - ◆ How an upgrade would impact existing technologies

### We will also identify:

- ◆ Areas of risk and ways to mitigate
- ◆ Potential training needs and strategies to develop the needed skills or facilitate knowledge transfer
  - ◆ Where and how to derive the greatest return on investment.

Finally, we will construct a clear and concise upgrade roadmap that incorporates the benefits to the organization, the people that will be involved, the process improvements and the cost estimates required to achieve your goals.

Everything you need to make an informed decision about whether you should upgrade now or sit tight and wait for a later release.

## ■ How long does it take?

### 2-3 Week PeopleSoft Upgrade Analysis

A typical 2-3 week PeopleSoft Upgrade Analysis would be appropriate for you if you have base financial modules implemented and would like to understand what features you can take advantage of in 9.0 as well as receive the high level project and resource plans needed to achieve the upgrade.

### 6-8 Week PeopleSoft Upgrade Analysis

A more comprehensive PeopleSoft Upgrade Analysis might be appropriate for an organization which has base financials implemented and would like to understand the benefits of extending the ERP system by building out the procurement process or asset lifecycle process.

BTRG has the capability to “demo” the complete suite of Financials, SCM and HCM PeopleSoft modules. During the analysis phase you might want to understand what additional benefit or quick wins they could achieve with the current version, but also look at the features in HRMS v9.

This type of study may involve a rationalization of customizations. A review of the business processes and functionality in the licensed but not implemented modules would also be included. The outcome would be an ERP strategy and a high level project and resource plan to achieve it.