

Coffee, Junk Food, and Good Humor: Recipe for a Successful PeopleSoft 8.9 Upgrade at Green Mountain Coffee

Lisa Kory
Green Mountain Coffee Roasters

Green Mountain Coffee Roasters is a public company (GMCR) that manufactures and sells specialty coffee as well as the Keurig Premium Single Cup Brewing Technology. Green Mountain Coffee undertook a PeopleSoft Financials and Supply Chain upgrade from FSCM 8.0 to FSCM 8.9 over the course of 14 months from June, 2006 until August, 2007. At the same time, we replaced the middle tier's hardware, upgraded the Operating System from Windows 2000 to Windows 2003 and upgraded the database from Oracle 8i to Oracle 10gR2. Soon afterwards, in November, 2007, we further upgraded the database to 64-bit Windows.

The motivation for the upgrade was to be on a supported release of PeopleSoft and Oracle database and to take advantage of enhancements in PeopleSoft 8.9, particularly in the inventory and shipping areas. We needed to go live before our busy season which starts in September, and we needed to make sure that at go-live we had at least the same functionality and performance as we had before the upgrade. These were our primary goals.

In addition to our developer team of 6 developers, a development manager, project manager, server manager and DBA, we contracted with several consultants (average 10 – 15) to assist in technical project management, development and security. In addition, we had 2 consultants dedicated to the upgrade itself. We also had our Subject Matter Experts in each functional area and they were assisted by functional consultants. Our SMEs are very knowledgeable in their areas since most of them have been with GMCR since the original PeopleSoft implementation in 1997.

Our hardware for the upgrade included 3 database servers and separate servers to hold PIA's for development, test, user acceptance, load testing and training. We had databases for each of these as well as Stage, where we kept the "golden" copy of the upgrade source.

We created the project plan by first having consultants give educational overviews of the 8.9 system. Then the users performed detailed fit-gap analysis. As a result of that the developers were able to estimate time for development. We included time for integration development, testing, tuning and training. Then we could create the entire project plan with estimated costs. Unfortunately we had to divide the work into 2 pieces for budgeting purposes as the first estimate (which proved very accurate) was too high to be approved at the outset.

The project went pretty much according to plan. We went live on August 20 and most of it was successful. We had problems initially with fulfillment, as we had not completely modeled all the permutations of shipping that users could perform. PeopleSoft Support was extremely helpful in resolving this over the course of a couple of weeks with 24-hour assistance as well as sending a couple of PeopleSoft developers to help us and providing us with bug fixes. General stabilization took about a month. Month-end and year-end processing were successful, and many jobs were much faster than in PeopleSoft 8.0 and Oracle 8i.

The success of this upgrade was due to several things. The strength of the individuals on the team, both GMCR employees and consultants, contributed to the quality of the upgrade. The energy during the project was mostly positive, and this can be attributed to good project management, a GMCR group that had already developed good relationships, and support from management. There were a lot of meetings, which sometimes seemed to take up too much time, but ultimately were credited with improving communication across the team. We had a large dedicated space for the project members to hold large cross-functional meetings and for end-to-end testing, as well as several smaller "war-rooms" for focused work in specific areas. Attention was paid to what might be considered small things such as a well-

stocked snack room, evening get-togethers and bi-weekly barbecues during the nice weather. And of course there was an endless supply of the best coffee!

Our project management for this project was significantly improved from the last upgrade of FSCM we did in 2001. We had a clear “on-boarding” process for consultants, including laptops, terminal servers with all the required tools, lists of names and contact information for GMCR, etc. so that experienced consultants could hit the ground running. We started using SharePoint to track and prioritize issues throughout the upgrade process and after go-live. We also used SharePoint to keep track of all of our documentation for Sarbanes-Oxley compliance.

At a certain point about 6 weeks before go-live, we flagged issues as “show-stoppers.” This was helpful in providing a definite cut-off when we determined we really could go live. If you wait for all issues to be resolved the go-live process would be pushed out much longer. At that point we also froze the staging database so that we could practice the upgrade a few times. Any changes made after this point were put into a separate database (which started as a copy of Stage) and were applied after the staging database’s objects were moved. We did a total of 5 test moves to production.

Having a hardware environment that duplicated our production environment, and in fact became our production environment at cutover, was a huge benefit. We could load-test our environment and determine whether our PIA configuration was sufficient. In addition, we did not have to wipe out our 8.0 environment when we did the upgrade.

Looking back at what we should have done differently, we see that preparing the facilities (the meeting space for example) sooner would have been beneficial. We even had to move all our offices to a new building during the project. The hardware platforms also should have been put together sooner. We were not sure we would need a third database server so it was a rush once we determined we would need it. Also we let the first phases of the project stretch out too long, which squeezed the testing and tuning phases. We did not have time to run several days of production-like activity as a test, and in fact only had a few Load Runner scripts. This is why we never came across the bugs that caused issues with fulfillment just after go-live.

We also had issues with our consulting partner. We had originally wanted 1 firm to manage our consulting requirements but found out after we met a couple of inexperienced consultants that this firm did not have much FSCM experience. So we had to switch consulting firms and the Project Manager ended up doing a lot of the recruiting. This also took significant developer time to interview candidates.

Finally, although we had management support for this project, senior management was unable to commit to the money required for the entire project at the project start. We divided the project into 2 phases: the first to do fit-gap and determine what would be required to complete the project and the second for the completion. After the first phase management approved the rest of the funds. Since we could not commit to the consultants early on that we would have the funding for them to continue, we lost some excellent consultants.