



RETAIL
TECHNOLOGY
CLIENT

TRILLIUM

SUCCESS STORY:

Retail Technology

Engagement: Technology Infrastructure Transition

Trillium Streamlines Simultaneous Production Upgrade and Infrastructure Move for Retail Technology Leader

Trillium was engaged by a leading technology company that provides retailers with in-store customer behavior tracking devices. Several data collection devices are placed at the entrances and other strategic locations throughout the store to capture different types of data – primarily how many persons walk into the store each day and how many of those shoppers are converted to buyers. These devices “phone home” the data to servers every night. Trillium’s client then processes and feeds the data to its retail customers. This data is vital for creating analytics on consumer buying patterns and other behaviors that are important to a retailer’s marketing strategy. And because of the strategic importance of this information, retailers expect a daily data feed.

Challenge: *Minimize downtime and ensure business continuity during simultaneous upgrade and move*

To improve provisioning of its services, Trillium’s client

Our Client

A nationally recognized retail technology company

The Challenge

Simultaneously complete a major software upgrade and infrastructure move to two separate facilities

How Trillium Solved It

Trillium employed its IT Transitions® methodology to reduce downtime and ensure business continuity during the move

Results

Reduced system downtime from a planned 48 hours to just 4 hours

Mitigated risk through Trillium’s hour-by-hour planning and communication

Streamlined move to new VOIP phone system for a 20 percent cost reduction

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embarked on a major Oracle portal upgrade. At the same time, it scheduled a relocation of its physical IT infrastructure from offices near O'Hare International Airport to two new facilities in downtown Chicago. The company planned to move its development server, new Oracle portal server, and primary backup server to a facility owned by colocation and hosting provider Savvis. Other servers would be moved to the client's new office space.

The move was scheduled for a holiday weekend and allowed for 48 hours of server downtime. However, management began to realize that this approach would put their retail customers in jeopardy of not receiving vital weekend shopper data at the end of each day as usual. Business continuity could be further threatened by unforeseen glitches during the move that could cause additional downtime.

Even a typical technology infrastructure transition is an exhaustive test of an IT organization's ability to re-establish its computing services to a new location with minimal impact to business operations. The client acknowledged that its project was far too complex for its internal resources to handle, so management called Trillium.

Trillium Solution: IT Transitions® methodology with hour-by-hour planning

Trillium approached the challenge with its IT Transitions® methodology, which focuses on business continuity planning during high risk upgrades and/or infrastructure moves. Trillium's team worked with the client to assess project goals and risk, and prioritize which servers were most important to business continuity. As such, the client was advised to give priority to upgrading and moving those servers with

critical path activities associated with the retail data collection first, so that those services could be brought back online with less downtime than previously anticipated. The team also helped the client update its application inventory before the move so that the company could have a better understanding of the dependencies among servers.

To ensure a streamlined, low-risk scenario, Trillium's team prepared a comprehensive, hour-by-hour project plan of everything that would happen during the upgrade and move. The plan addressed the need to move the client's back office systems to its new office facility, while transitioning its customer facing infrastructure to a colocation facility. For years, all of these systems resided within one self-contained facility at the company's original location.

Trillium also worked to raise confidence among company leaders that the IT group could pull off such an ambitious project. To bring about this boost in confidence, Trillium's team managed expectations, delivered a solid work plan, structured the issue resolution process, and got all stakeholders actively involved in planning and testing activities.

Prior to the move, Trillium also handled the coordination of the multiple hardware vendors. The Trillium team communicated closely with SBC (now AT&T), Savvis, Cisco, and others to authorize equipment moves without voiding any warranties.

In addition, Trillium helped the client plan for the adoption of Voice over IP (VoIP) at the new facility to replace and update its aging call center infrastructure. As a result, the client was able to upgrade its call center capabilities to a queue-based process with improved routing and 24/7 support.

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Trillium's rigorous planning and preparation was put to the test when the air conditioning failed in the client's new server room during the move. Fortunately, Trillium had identified such a scenario in its risk planning, so the team was prepared to act. Even though the client did not have a purchase order agreement yet with the HVAC provider at the new building, Trillium was able to get the service personnel to come out and fix the problem. The team also made sure that the critical retail data-collection servers were working while the air conditioning was being fixed by running fans to cool the room.

Results: Reduced downtime to 4 hours with no risk to business continuity

The major benefit of Trillium's IT Transitions® methodology was a drastic reduction in the expected downtime during the move – from a planned 48 hours to just 4 hours. As a result, the client was able to deliver critical data to its retail customers without interruption.

The client also benefitted from Trillium's expertise and assistance in putting in place a new VoIP system. This has resulted in a 20 percent reduction in operating costs compared to its previous call center phone system.

Overall, Trillium was able to help the client successfully complete a very ambitious simultaneous upgrade and infrastructure move. Using the IT Transitions methodology, Trillium identified and executed a unique managed approach that met the client's key challenges of minimizing downtime and avoiding disruption of key business services.

About Trillium

Trillium Solutions Group, Inc. is a professional services firm headquartered in Chicago that provides technology consulting and strategic sourcing services for industries such as trade associations, financial services, telecommunications, and healthcare. For more information, please visit www.trilliumsg.com.