



## TAKE-OFF 2020 Leasing Platform Transformation

Client: TIP de Mexico – Trailer and Auto Finance

## The Situation

Our client, one of the largest Trailer and Auto Finance companies in Mexico were engaging in a hardware upgrade, in doing so they decided to undertake a complete platform replacement and simplification project called Take-off 2020. In TIP de Mexico over time, numerous custom applications had been built to address point solutions and isolated business requirements. TIP de Mexico approached VIP Apps Consulting to advise and implement the Oracle Lease and Finance Management (OLFM) leasing platform.

### The Project

Deliver leasing platform digitisation and reduce custom applications by adopting standard applications and achieve Business Simplification.

### The Challenge

To Simplify and Implement the new platform within a fixed timeline including data conversion of Lease Portfolios and off lease inventory. Managing language and location differences with a cohesive team of VIP Consultants, Client Key Users and Partner resources.

### The Solution

Phase 1: Map and document the Future Landscape Business Flows, Business Requirements and Gap Analysis.

Phase 2: DELIVER the Technology and Business Transformation leveraging Oracle Lease & Finance Management.

### The Result

The project was a success in delivering the business requirements and efficiencies identified. The client has the ability to scale significantly with the new platform.

## The Solution

A phased approach to understand the business objectives and potential for simplification, together with a firm understanding of timeline, resources and budget to complete the Implementation successfully.

### Phase I

- Discovery Workshops & Process Landscape definition.
- Requirements Identification, Definition and Approval
- Gap Analysis

### Phase II

- Solution Design & Configuration
- Data Conversion Workstream
- Iterative Build and Test Cycles
- Validation of functionality against business requirements
- Execution of cut-over
- Run in "Business As Usual"
- Hypercare Support

### Project Management

According to VIP Apps Consulting's methodology "DELIVER" the (D)iscovery, (E)ngagement and (L)andscape ("DEL") was achieved during Phase One. The second Phase of the implementation involved (I)terative design, build, test and then end to end (V)alidation of the process and system solution. Finally, (E)xecution of the cut-over and to (R)un the business on the new solution ("IVER").





Initial client discussions gave us an understanding of the business drivers and goals for the project. We established what was involved, including location of activities, language considerations, allocating skilled resources and agreeing on the high-level project structure and governance model.



VIP Apps Consulting team worked with the client to agree project deliverables, timelines and resource needs to define full scope and cost including data migration. The Project Scope:

- Requirements gathering from the business key users and IT team
- Fit and Gap analysis against the standard product modules
- Design, test and delivery of custom enhancements identified as required from Gap analysis
- Configuration design
- Project Management
- Test Management for Iterative test cycles including test plans, test results, defect tracking and resolution.
- Creation of configured test instances with test lease contracts
- Full data conversion to include 3 rounds of data conversion tests

Utilising a ready-configured 'blueprint' DELIVER project structure, we could apply a standardised set of tasks, deliverables and milestones and quickly tailor these to the specific parameters of the project.



The future business process landscape was defined through a series of VIP Apps Consulting workshops with our Business Analyst for each area leading the subject matter experts from the business and the technology partners in building the target landscape flows.

The design focused on the key drivers of the business in terms of mobility and flexibility of the transfer of assets between contracts and accuracy of billing for additional services associated to the assets on contract.

Key deliverables for the landscape phase were:

- Complete set of process maps per business area
- Full capture and documentation of business requirements
- GAP Analysis and MoSCoW ratings



The solution is built up of multiple iterative cycles of design, configure, build and test. The end of each test cycle indicates the end of an iteration. To allow an early 'look and feel' of the new OLFM module and the functionality for the IT and business stakeholders, an initial test Instance was configured to walk through the business process using some sample client contracts setup in the system.

The Iteration 1, conference room pilot model, helps to validate everyone's understanding of the requirements, the system functionality walkthrough is simultaneously aligned to the business process maps and GAPS are discussed at the relevant point. When the GAPS and base functionality requirements were confirmed we could ensure the full solution would meet the business requirements and objectives for the client.

Using agile methods to rapidly design, build and test extensions for the functionality GAPS, VIP Apps Consulting built and tested internally before Iteration 2, conference room pilot, where real contracts were used to demonstrate the functionality GAP solutions on top of base functionality and against the business process maps. Each Iteration was managed with formal defect tracking and user approval by requirement formally presented back to management.

In parallel to the Iterations of GAP development and testing, the data conversion workstream were also iteratively building and testing the conversion programs to transfer all customers, assets and contracts to the new platform. Mapping, data transformation, load and test in iterative cycles, allowing feedback to the client on data issues for correction in the source systems. Practice makes perfect, the 3 rounds of conversion test in scope for the client turned into about 33 rounds, we maintained our timeline, the client team, partners VIP Apps Consulting worked as one team to achieve the best quality conversion possible.



Validation of the full solution consisted of client user testing of the end to end business process in the system using new and converted contracts. An exact mirror of deals passing through the old platform were processed on the new platform. The client performed a full billing cycle as part of the validation testing in order to reconcile against the legacy invoices and manual invoices raised on the old platform. VIP Apps Consulting were onsite dealing with questions and resolving any issues but at this stage of a VIP Apps Consulting project the client key users are familiar with the new application and the new business process in order to give business sign-off and acceptance.



The cutover execution consisted of portfolio conversion from the old platform to the new, contract aging, and financial reconciliation. Clients invoices were delivered from the new platform on time in the cutover month.



Our team ensured that TIP's Production Support team had the handover and training needed to ensure the business could run smoothly and effectively without ongoing consulting help. Post Implementation we have worked in an advisory capacity for continuous improvement, day to day running is smooth.





## Results and Benefit to the Client

The project objective was to transform and upgrade the platform in order to simplify the business processes and underlying systems using standard functionality as much as possible.

Project governance ensured visibility and buy in with the business leaders throughout the project. Post project feedback from the client highlighted recognised efficiency gains related to visibility, flexibility and accuracy of billing processes, and control over asset movements in the Trailer business.

Guillermo Llantada, Director of Systems & Quality, TIP de Mexico commented:



*'It has been an honour and a pleasure partnering on this project with the professional VIP Apps' team. At this moment TIP MEXICO has the platform to increase and improve services for our customers. Thank you very much to the entire VIP team, your support and guidance were crucial to reach our dream.*

**Congrats MISSION ACCOMPLISHED!**