# HELZBERG DIAMONDS®

# Upgrading, integrating and adding functionality: Setting the stage for what comes next

Jeff Rohr, CIO Helzberg Diamonds
Kimberly Berneck, SVP BTM Global

# Helzberg Diamonds

❖ Founded in **1915** by Morris Helzberg in Kansas City Missouri

❖ **+2,500** Associates

❖ **+210 stores nationwide** as well as online store

❖ Stores include Mall, Free Standing, Lifestyle and Outlets

❖ Wide selection of fine jewelry: diamond engagement rings, wedding rings, precious gems, watches and more

❖ Subsidiary of Berkshire Hathaway since 1995

❖ Implemented first Micros Xstore store in 2012

❖ Currently leverage Xstore, Customer Engagement, Order Broker, and Balance

# Challenges and Motivations to Upgrade

❖ Old, end-of-life, inflexible technology
  ▪ Outdated version (v4.5) of Oracle Xstore in the stores
  ▪ Operating system reached end-of-life

❖ Increasing demands to change, grow and adapt

❖ New solutions and functionality (clienteling, in-store pickup) required to stay competitive and service customers

❖ Mobile POS was challenging

❖ Heavy customizations impacted efficiency, responsiveness, and on-going support cost investments

❖ Did not want to roll trucks to perform the upgrade

# Why Oracle?

❖ Invested in a leading solution

❖ Oracle acquisition enabled
  ▪ Additional funding
  ▪ On-going strategic investments
  ▪ Continued innovation
  ▪ Operability across solutions for end-to-end capabilities

❖ Large user community and user base

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# Why BTM?

❖ Long-term Oracle Partner

❖ Life-cycle support and transition experience

❖ Point-of-Sale and EMV payment expertise

❖ Ability to focus, dedicate consistent resources and collaborate with Helzberg

❖ Engage flexibly

❖ Customer referenceability

❖ Culture fit

# Upgrade Scope

❖ Upgrade Xstore v4.5 to Xstore v15 (including Xcenter, Xoffice, Xadmin components)

❖ Enable / integrate EMV, tokenized, encrypted payment capabilities

❖ Add integration with Oracle Customer Engagement

❖ Maintain integrations with Oracle Order Broker

❖ Remove and streamline customizations (where possible)

❖ Upgrade operating system to Win10

❖ Use automation to migrate data, upgrade technology and application

❖ Complete the upgrade remotely (rather than having on-site technicians at all stores)

# Upgrade Approach ('right-sized pieces')

❖ Organized key workstreams: Provide focus and ability to stagger business benefits
  ▪ Production support of Xstore v4.5
  ▪ EMV-enablement and payment integration with Xstore v4.5
  ▪ Technology, O/S, security updates
  ▪ Xstore upgrade to v15 (with EMV enablement and payment integration)

❖ Prioritized production stability and operability

❖ Identified and planned small, critical support releases based on business need/priority

❖ BTM and Helzberg collaboration: Tailored work efforts and ownership throughout

❖ Focused on **technical** upgrade initially, then revisited custom modifications and additional base capabilities to leverage

❖ Planful, diligent code branching / source code and environment management

# Timeline

- ❖ Organized key workstreams
- ❖ Transparent, proactive communication
- ❖ Focused on iterative deployments and business benefits
- ❖ Open and joint collaboration on refinements
- ❖ Kept an eye on change management
- ❖ Worked through challenges with long-term partnership in mind



Note: Red line is based on status period end date.
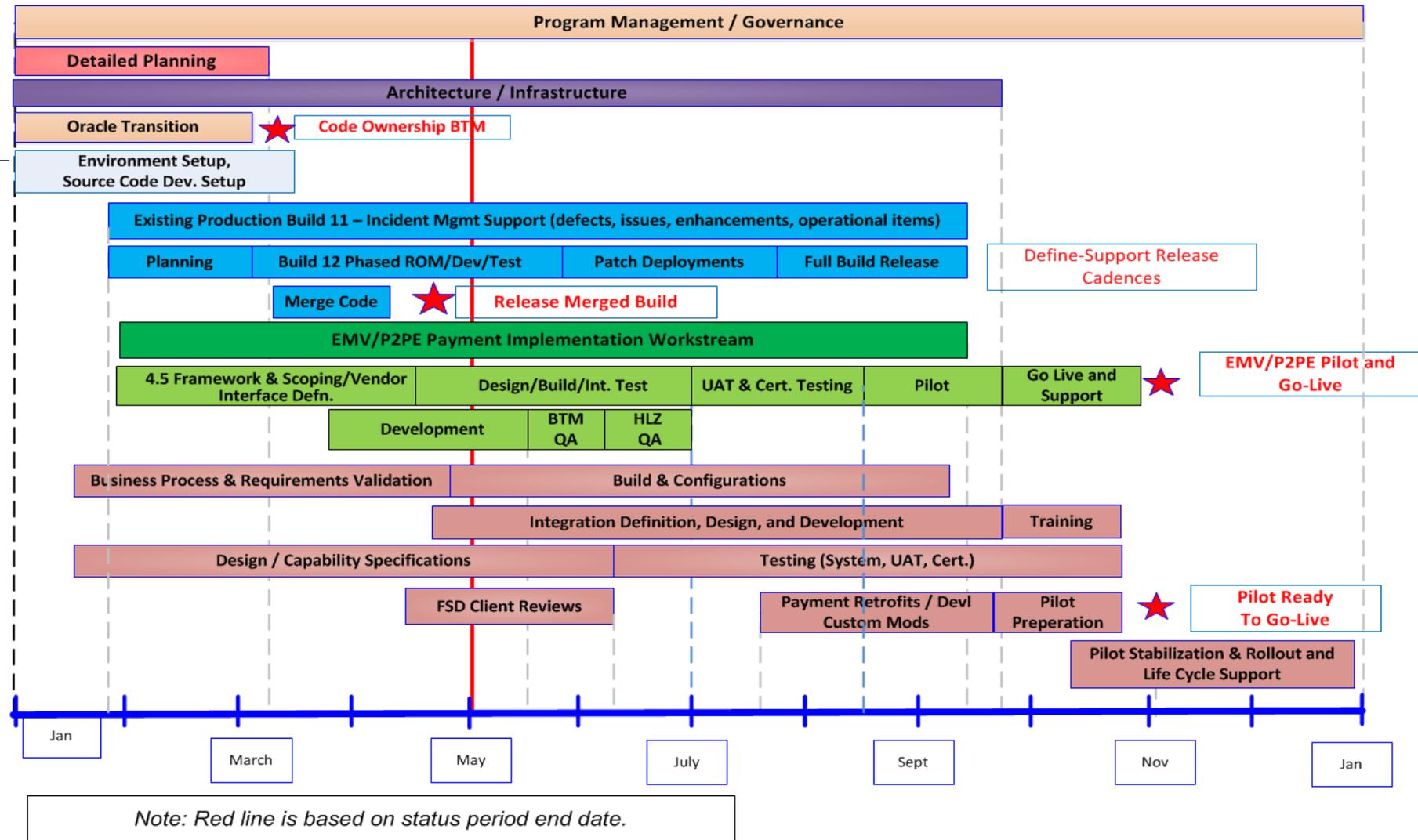
# Key Lessons Learned

❖ Identify and don't lose sight of business objectives/goals

❖ Be realistic in planning
- What are you asking your team to do?  What other work are they responsible for?
- Can your organization handle the amount of change within the planned timeframe?
- Do you have all the skills you need?
- What constraints need to be managed (budget, timeframe, etc.)?

❖ Be proactive, transparent and communicate often!

❖ Manage scope diligently

❖ Be open to refinement and Plan B

❖ Be cognizant of making short-sighted decisions; make conscious decisions

# What Comes Next?

❖  Xstore v15 Upgrade – Fully Rolled Out!

❖ Take advantage of new / enhanced Xstore functionality in stores

❖ Test and deploy mobile functionality

❖ Continue streamlining / reducing custom modifications

❖ Plan for next release (including future upgrade to remain current)

# Questions?

Jeff Rohr

CIO

Jjrohr@helzberg.com

Kimberly Berneck

SVP, Delivery

Kimberly.Berneck@btmglobal.com