

Goodyear's Tire-HQ Portal: An on demand Solution Delivers Value and Satisfaction to Dealers

An On Demand Business Case Study sponsored by IBM

Becoming on demand

Goodyear, the world's largest tire manufacturer, responds to its dealers' information and transactional needs through Tire-HQ, a realtime tire ordering and information system. The highly resilient new system has enabled Goodyear to keep pace with robust transactions growth. As its dealers have registered big increases in productivity, their satisfaction with and loyalty to Goodyear have grown along with it. By outsourcing the managing of the system to IBM, Goodyear has been able to keep its costs low and variable while sticking to its core competency selling tires.

Why IBM

"We saw IBM as a partner that could provide all the critical resources we needed to help us with the ongoing transformation of our business—from core technology to architecture development to the hosting of our e-business services."



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THE GOODYEAR SOLUTION at a Glance

BUSINESS DRIVERS	Customer Business Challenge	In the late 1990s, Goodyear dealers were unable to get the information on products, prices, specials, inventory availability and order status when they needed it. In the area of transactions, dealers spent too much time placing orders, and the turnaround for these orders was too slow. While Goodyear's first system addressed many of these challenges, it also spawned a second set of challenges that were linked to the rapid adoption of the system by its dealers. Later, heavy usage had begun to place pressure on the original solution which, as a Phase I effort, was designed with limited scalability and failover capacity making it vulnerable to downtime or diminished performance. The system's limited flexibility also posed a barrier to the execution of business-level strategies, most notably the expansion of channels, brands and products supported by the solution.
	on demand Business Rationale	In the first phase of its on demand evolution, Goodyear needed to be more responsive to dealer requirements for more information, as well as the ability to conduct and manage transactions more efficiently. Moreover, Goodyear needed to provide these capabilities in a cost-effective way that allowed the company to focus its finite support resources. In the second phase, rapid adoption and increased usage led to the need for a more resilient solution. Goodyear also needed a more responsive system that was flexible enough to adapt to dynamic customer-driven and business-driven requirements.
BECOMING ON DEMAND	Business Process Adaptations	Goodyear's initial adaptation was to introduce a system that provided dealers with product and marketing information as well as the ability to place and track orders—all in realtime. By shifting a substantial volume of dealer requests from its call center and reducing its reliance on highly manual processes, the system improved efficiency and productivity for Goodyear and its dealers. The second adaptation—designed to address the need for resiliency and flexibility—was the deployment of a multi-tier solution whose robust routing and self-optimizing capabilities eliminated the original system's availability issues and made it more scalable.
ON DEMAND	on demand Operating Environment	The solution was implemented by IBM Business Consulting Services with the assistance of IBM Software Services for WebSphere and the IBM Global e-business Solution Center, and was hosted by IBM Global Services e-business Hosting Services. Its key elements include IBM WebSphere Application Server, IBM WebSphere Commerce, IBM DB2 Universal Database, IBM Lotus Notes, IBM Lotus Domino, IBM eServer zSeries servers and IBM RISC-based processors.
		The system handled a four-fold increase in volume while providing
		better than 99.9 percent uptime.
ON DEMAND BENEFITS		 By leveraging out-of-the-box functionality, the solution enabled Goodyear to lower application management costs.
		 Employing a standardized solution enables Goodyear to rapidly and cost effectively respond to dealer requests for new services.



SITUATION ANALYSIS

Background

The Goodyear Tire and Rubber Company is the world's largest tire company, with revenues of approximately \$14 billion and more than 90,000 employees worldwide. Its largest unit, North American Tire, provides original equipment and replacement tires for autos, motorcycles, trucks, farm, aircraft and construction applications in the United States, Canada and export markets. In addition to Goodyear brand tires, the company produces and sells tires under other popular brand names such as Dunlop and Kelly. Goodyear also manufactures other automotive rubber products and industrial chemicals, and operates more than 2,000 tire and auto service center outlets worldwide.

Over the past few years, the North American tire industry has witnessed a significant increase in competitive intensity. The combination of stepped up competition from low-cost manufacturers and a glut of manufacturing capacity has conspired to depress prices and cut margins industrywide. To strengthen their bottom lines, manufacturers have embraced measures targeted to both the revenue and the cost sides of the profitability equation. For Goodyear specifically, the ongoing adoption of on demand business elements—detailed below—has been a key part of its emerging competitive strategy.

Phase One: Being More Responsive to Dealers

Within Goodyear's overall business model, few components are as important as its extensive dealer channel. As its primary distribution channel, Goodyear's growing network of more than 5,000 independent dealers, affiliated dealers and company-owned outlets represents the main interface to the customer and, as such, is key to the company's success in the marketplace. While the dynamics of Goodyear's dealer-related strategies may be complex, this much is simple—the easier it is for dealers to do business with Goodyear, the more likely they are to be satisfied and, ultimately, sell more Goodyear tires. With this principle in mind, Goodyear has long supported its dealers by providing them with an ever increasing array of Web-based services and information—delivered in an increasingly on demand way.

Goodyear's on demand story has unfolded in phases. Early on, dealers required an ability to get information on products, prices, specials, inventory availability and order status—when they needed it. On the transaction side, there was a concern that dealers spent too much time placing orders, while the turnaround for these orders was too slow. These inefficiencies made it harder for dealers to effectively serve their customers. In short, Goodyear needed to be more responsive to dealer requirements for more and fresher information, as well as the ability to conduct and manage transactions more efficiently. And it needed to do so in a cost-effective way that allowed the company to focus its finite support resources.

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By outsourcing the hosting and management of the solution, Goodyear was able to adopt a financial strategy that minimized fixed costs and kept ongoing costs variable.

Goodyear's answer to this challenge was XPLOR, a highly successful order management and information delivery system hosted by IBM Global Services that provided dealers with realtime product and marketing information as well as the ability to place and track orders online. The XPLOR solution dramatically improved Goodyear's ability to respond to dealer needs for better service, more current information, and faster order turnaround. While helping to solidify dealer satisfaction, XPLOR also delivered a potent mix of internal benefits, including the elimination of significant communication and transaction costs related to its old PCbased EDI system. The XPLOR system also represented a powerful tool in Goodyear's ongoing effort to optimize the overall efficiency of its finite support resources. Because the system was able to process simple or routine transactions (such as order status inquiries and recurring purchases), Goodyear could now direct its support resources to helping dealers solve more complex problems—like configuring large orders or working out shipping dates—and to resolve these problems more quickly. The result was a win-win situation where dealers got the convenience, choice and responsiveness they needed, and Goodyear had a more efficient, flexible way to allocate its resources.

The XPLOR solution also addressed the need for cost control, driven by industry competition, in two ways. First, the flexibility to allocate resources outlined above meant that Goodyear could increase its problem resolution "bandwidth" without having to add call center staff—an option that was not on the table. Second, by outsourcing the hosting and management of the solution, Goodyear was able to adopt a financial strategy that minimized fixed costs and kept ongoing costs variable. Outsourcing of hosting and management also freed up Goodyear staff to focus on the business end of dealer support.

Phase Two: Success Creates the Need to Adapt

Within the first few years of its introduction, XPLOR became a hit among Goodyear's dealers, with the number of dealer locations using the system more than doubling from 1999 to 2000. While the number of users grew quickly, the number of transactions processed by the system grew even faster—solid evidence that dealers had begun to meld XPLOR with their core processes. But the rapid adoption of the solution by Goodyear's dealers also began to spawn a series of new challenges, the most immediate of which was the increasing pressure that heavy usage had begun to place on the first-generation XPLOR solution.

Satisfaction among dealers depends heavily on their ability to access the solution when they need it, as well as to get consistent, superior levels of performance even during periods of peak volume. While the solution easily met performance requirements in the early stages of its lifecycle, the projected growth of users and transaction volume posed a significant threat to the solution's performance. Indeed, the risk of weakening satisfaction among dealers—at a time of fierce competition in the tire industry—made solution performance a top strategic issue.

Looking into the future, Goodyear also had concerns about the system's ability to adapt to changing business strategies. The first was the company's imminent plan to expand the brands covered by the XPLOR system from Goodyear (the initial brand) to Dunlop and Kelly. The second concern was the company's somewhat longer-term plan to expand the solution's availability from dealers to a new and diverse group of channels that included smaller OEMs (e.g., trailer manufacturers), national accounts, state and federal government and mass merchandisers. With these business strategy changes on the horizon, Goodyear's planners saw the



XPLOR system as a potential bottleneck to their successful implementation. Among the most significant problems was a general lack of flexibility in the system, a product of its heavy reliance on customization and the fact that it wasn't standardized. As Goodyear sought to add new channels, this inflexibility threatened to make implementation and management prohibitively costly and time consuming.

The expected influx of new channels and brands running on XPLOR also posed a serious threat to the system's performance, which had already begun to show hairline cracks from the first generation of users. Adding channels and brands meant more products, more users and more transactions—all of which would put considerable pressure on the system's performance and availability. As VP of Supply Chain Patrick Hurley points out, the threat of diminished performance induced by broader channel and brand coverage ran headlong into rising expectations among existing dealer users, to whom XPLOR had become a valuable resource. "Dealers had begun telling us that 100 percent uptime was absolutely crucial to them," says Hurley, "and there was a growing number of dealers saying 'I can't function when the site goes down.' "In addition to these higher performance expectations, dealers had also begun clamoring for more features and functionality from XPLOR. Goodyear's efforts to meet dealers' emerging functionality requirements further accentuated the system's inflexibility.

While XPLOR initially enabled Goodyear to be more responsive to dealers' information needs, this new set of factors underscored the need for more resiliency in the solution. With performance expectations on the rise and the system poised for a surge of new users, Goodyear needed a solution that could deliver both high availability and uncompromised performance. At the same time, Goodyear needed a platform that was flexible enough to adapt to the full range of customer-driven and business-driven requirements that were beginning to emerge. In short, the company needed a solution that, because it was standardized and integrated, was responsive at the system level to business-level requirements and opportunities—adding new channels, integrating new partners, delivering new features.

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President, Supply

Chain, Goodyear

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them, and there was a

ACTION PLAN AND DECISION PROCESS

Business Process Adaptations

To address its looming challenges, Goodyear set out to transform its solution to deliver more resiliency, flexibility and functionality. To improve resiliency, Goodyear—working with IBM Business Consulting Services—instituted fundamental changes to the solution's architecture. While the initial two-server architecture had served Goodyear's dealers well in the first phase of the system's life, it clearly lacked the capacity to grow along with the company's burgeoning needs. In its place, IBM Business Consulting Services designed a multi-tier solution that provided robust routing and self-optimizing capabilities where none had existed before. This new architecture (running in IBM's Raleigh, NC e-business Hosting Center) eliminates the availability issues endemic to the original solution, while at the same time providing an unlimited degree of scalability. This latter attribute was critical, given the system's rapid growth and ambitious plans.



Upgrading the solution to a WebSphere Commerce Java-based solution laid the groundwork for a number of critical business process adaptations, both internal to Goodyear and among its dealers. Within Goodyear, the new system's flexibility has delivered the responsiveness its planners had envisioned. Newly standardized, the system is now easier to grow and manage. The system's newfound flexibility is seen in its ability to turn on a dime in responding to dealer requests for new features and functions. For example, when dealers asked for major modifications to report formats, Goodyear was able to make the changes quickly, delighting dealers and minimizing the drain on its internal staff.

By deploying a more resilient system—one that handles volume spikes smoothly and virtually eliminates downtime—Goodyear has solidified dealer loyalty and strengthened its revenues and market position.

The improved resiliency of the system has also supported the company's central business strategy of strengthening its market position through expanded dealer sales. This strategy rests on the time-tested assumption that more satisfied Goodyear dealers buy more Goodyear tires. While the system's features and functionality are major drivers of dealer satisfaction, the most fundamental underpinning is the system's reliability: that the system is there when a dealer needs it. By deploying a more resilient system—one that handles volume spikes smoothly and virtually eliminates downtime—Goodyear has solidified dealer loyalty and strengthened its revenues and market position. The new system has also bolstered the bottom line by improving the overall efficiency and productivity of the company's support resources. This has enabled Goodyear to serve a growing base of dealers without the need to add costly new support personnel. With tire manufacturers' ability to raise prices limited, these productivity increases represent an important source of margin support.

The system has also facilitated important process adaptations on the dealer side. With the addition of the Dunlop and Kelly brands, dealers now have a broader selection to sell to consumers and—as a result—expanded revenue opportunities. Moreover, the new solution has made dealers even more productive by promoting the rapid development and release of new features, functions and information. Perhaps best of all, dealers can access the solution 24 by 7 with no service interruptions and consistently high levels of performance. In sum, the new solution makes it considerably easier to do business with Goodyear.

Decision Process

Having established the need to make its system more resilient and responsive, Goodyear began looking for a partner who could deliver the technology, business process expertise and overall depth of experience to make it happen. Given IBM's longstanding relationship with the company—and the success of the initial system—the Goodyear team put IBM at the top of its list of partner candidates. According to Stephanie Wernet, Vice President of Information Technology and Chief Information Officer, Goodyear sought to work with a provider that not only knew its business, but also had a solid track record building on demand solutions that delivered real business results. "We saw IBM as a partner who could provide all the critical resources we needed to help us with the ongoing transformation of our business—from core technology to architecture development to the hosting of our e-business services," says Wernet. "IBM's leadership in the on demand business space was directly in line with our goals as a company."



"We viewed the opportunity to evolve IBM's role to the next stage—to that of a provider of on demand solutions—as making a lot of sense for us."

—Stephanie Wernet,
Vice President
Information Technology
and Chief Information
Officer, The Goodyear
Tire and Rubber
Company

While IBM's on demand credentials weighed heavily in Goodyear's decision, the company was also strongly influenced by specific elements of IBM's product portfolio. Of particular interest was the IBM WebSphere family of products, which the Goodyear team saw as a tight fit with its emerging needs. "IBM showed us how an architecture built around WebSphere Commerce and WebSphere Edge Server could deliver the kind of scalability, performance and robustness that we clearly needed," says Wernet. "We considered these products the ideal building blocks for the kind of flexible, resilient system we were trying to put in place for the future."

A focus on the future was also a driver of the company's other key reason for its attraction to IBM WebSphere products—strong support for industry standards. Much of this need was tied to the need to integrate, both internally and externally. Typically, the addition of new brands, channels and services requires Goodyear to create or extend realtime integration to backend systems such as SAP or, increasingly, to third parties such as mass merchandisers. With these types of initiatives likely to dot its future strategic landscape, Goodyear viewed strong standards support as critical to making integration rapid, smooth and cost-effective. As Wernet points out, Goodyear viewed IBM's leadership in the standards space—exemplified by the strong support of its WebSphere products—as a source of security in the future. "We liked where IBM was taking its products vis-à-vis standards compliance because it kept our strategic options open," explains Wernet. "With e-business moving front and center for us, we viewed [investments in] IBM technology as a way to be more responsive to these opportunities."

SOLUTION PROFILE AND IMPLEMENTATION STRATEGY

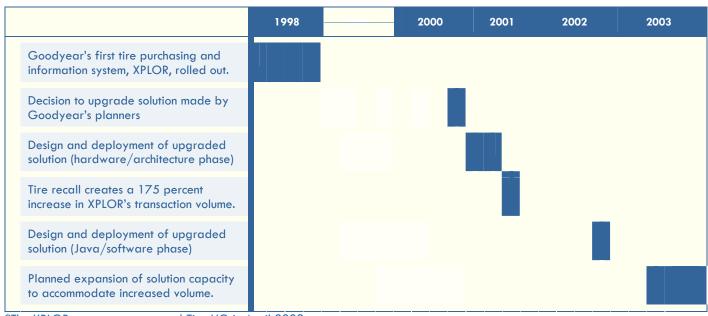
Solution Deployment

Goodyear contracted with IBM to design and deploy the upgraded solution in early 2001. IBM's implementation team involved the resources of several organizations. IBM Business Consulting Services played the lead role in designing the solution, with strong involvement from the Enterprise Application Integration practice within IBM Business Consulting Services. Substantial design assistance was also provided by the IBM Software Services for WebSphere team located at IBM's Toronto lab, a group of some 150 developers focused on providing design and implementation support for WebSphere Commerce. Once the solution was designed, it was subjected to a due diligence analysis performed by the IBM Global e-business Solution Center—a Technical Core Competency Center focused on working with IBM customers worldwide to architect, integrate, and test leading-edge solutions. A key goal of the review was to ensure that the products proposed by IBM Business Consulting Services were optimal for the solution.

Once the design was approved, the solution was deployed by staff from IBM Business Consulting Services and IBM Global Services e-business Hosting Services in Raleigh, NC. In parallel with this, IBM Business Consulting Services built a



EXHIBIT 1: KEY MILESTONES FOR THE GOODYEAR TIRE-HQ* SOLUTION



*The XPLOR system was renamed Tire-HQ in April 2003.

Source: Goodyear and IDC

Key Components

Software

- IBM WebSphere Application Server
- IBM WebSphere Commerce
- IBM WebSphere MQ
- IBM WebSphere Edge Server
- IBM DB2 Universal Database
- IBM Lotus Domino and Notes

Servers

- IBM eServer zSeries, pSeries
- IBM RISC-based Processors

Services

- IBM Business Consulting Services
- IBM Global Services:
 e-business Hosting Services
- IBM Software Services for WebSphere

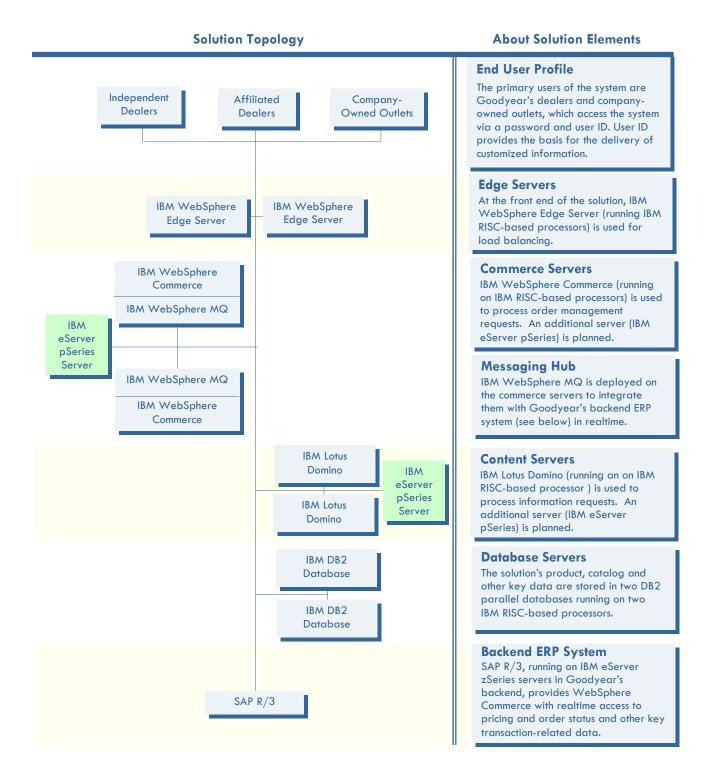
mirrored system at Goodyear's Akron, OH headquarters to perform application development and testing. This solution, along with the production solution in Raleigh, is managed by IBM Global Services. While IBM staff were the primary drivers of the development effort, Goodyear staff also worked in close collaboration, providing intellectual leadership on issues related to business rules and the solution's governance model. In addition to providing valuable input into the process, Goodyear's close involvement ensured that it could assume full control of development going forward. "This was not a 'throw-over-the-wall' kind of project," says Jim O'Neil of IBM Business Consulting Services. "It was from the start a partnership of working together."

The Solution in Action

Goodyear's upgraded solution, completed in 2Q01 and renamed "Tire-HQ" in 2Q03, is comprised of two sets of features. The so-called Information Delivery features, running on the Lotus Domino platform, enable dealers to view product and other dealer-specific information. In the area of information security, dealers define their employees' access privileges at their location, while Goodyear determines system-wide access privilege. [Goodyear also uses IBM Lotus Notes to manage content for the Tire-HQ solution, as well as for e-mail, scheduling, and collaboration across the company.] Dealers using the Order Management portion of the Tire-HQ solution can browse for specific products or search (by tire size and other parameters) through a product catalog. Dealers build their order by placing items in the "Tire Dolly," the solution's shopping cart. Prior to placing orders, dealers can check Goodyear warehouses within a given region (determined by the location of the dealer) for realtime price and product availability. During this query, the Tire-HQ system indicates the number of tires located at a particular warehouse,



EXHIBIT 2: BASIC ARCHITECTURE: GOODYEAR'S TIRE-HQ SOLUTION







as well as the number of products in transit and/or on backorder. The solution also enables dealers to track order status, obtain post-sales service and view accounts payable information and invoices.

Transactions and information requests coming into the system are received by one of two RISC-based IBM servers running WebSphere Edge Server, which performs load balancing for the solution (see Exhibit 2). For transactions, the edge server intelligently routes the request (based on utilization levels) to either of two IBM servers running IBM WebSphere Application Server and WebSphere Commerce, which then extracts catalog data from a database server running IBM DB2 Universal Database. For transaction requests related to price and availability, the request is sent from WebSphere Commerce to a messaging hub running IBM WebSphere MQ that is integrated with Goodyear's SAP system. After issuing the request to SAP, the hub returns the request in realtime to the dealer. Information requests (e.g., product or marketing information) are routed from the edge servers to one of two Lotus Domino servers (also running on RISC-based IBM processors). These requests are also sent to the hub, which then issues them to SAP and sends the response back up the pathway. The messaging hub—so important to the Tire-HQ solution—also services requests from Goodyear's call center representatives seamlessly.

Resiliency in Action: XPLOR Weathers a Recall-Driven Demand Surge

By upgrading its dealer system, Goodyear is now well positioned to weather unpredictable changes in market conditions. One recent event bears this out in dramatic fashion. In May 2001, after one of Goodyear's competitors already had recalled 6.5 million tires, Ford announced it was replacing an additional 13 million tires, creating a huge—and unexpected—increase in demand for Goodyear's tires. This increase in turn led to a huge spike in demand for the upgraded XPLOR system, which experienced a 175 percent increase in transaction volume. The system's ability to handle this volume with no degradation in performance or reduction in availability attests to its resiliency.

BUSINESS RESULTS

Goodyear added more resiliency to the XPLOR solution to meet the sharp increases in usage it projected. Judging by the robustness of the solution's growth since that time, its planners were right on the mark. Since the upgraded XPLOR solution went live in March, 2001, the share of overall sales handled by the solution has experienced a four-fold rise—from 10 percent to 40 percent. From the end of 2002, the number of order management inquiries has also increased by a factor of four (from 90,000 to 360,000), while the number of monthly page views for the information delivery part of the solution more than doubled to 330,000. But the truest measure of success—indeed, the acid test—has been the solution's ability to handle this robust volume while meeting its dealers' rising expectations for performance. As a sign of its commitment to meet them, Goodyear signed a hosting agreement that commits IBM Global Services e-business Hosting Services to 99.9% availability against financial penalties. The fact that the solution has met these rigorous requirements is a testament to the quality of the managed hosting service that IBM provides—and the foresight of the Goodyear/IBM team.



EXHIBIT 3: BUSINESS RESULTS FOR GOODYEAR'S TIRE-HQ SOLUTION

Business-Level Benefits	Enabling Process Changes	Linkage to Solution
Increased Sales/ Higher Dealer Satisfaction	The system's ease of use has increased dealer satisfaction, leading to an increase in overall sales to the dealer channel.	The solution employs advanced navigation and offers the most extensive set of features and services in the industry.
Cost Avoidance	Goodyear's solution has led to annual print, postage and communication cost savings in excess of \$1 million.	The solution delivers product, marketing and promotional material to dealers via the Web in realtime.
Improved Efficiency	Goodyear's call center staff is now better able to address more complex, value-added tasks.	The solution handles less complex inquiries and transactions.
Increased Responsiveness	Goodyear's solution has reduced dealers' order processing cycle time from overnight to realtime.	The solution is integrated in realtime with Goodyear's SAP ERP system.
Technology Benefits	Underlying Product or Attribute	Benefit in Action
Technology Benefits Increased Resiliency	Underlying Product or Attribute WebSphere Edge Server	Benefit in Action The system handled a four-fold increase in volume while providing better than 99.9 percent availability.
	, -	The system handled a four-fold increase in volume while providing better than 99.9

Source: Goodyear and IDC



"Tire-HQ, our WebSphere softwarebased solution from IBM, is playing an important role in building dealer satisfaction and enhancing productivity across Goodyear's supply chain. Features like realtime communication and order management add value while streamlining business interactions."

-Patrick Hurley

While added resiliency helped meet surging usage volume, recall that Goodyear also needed a system whose openness and flexibility would allow the company to more quickly respond to evolving dealer needs while at the same time keep cost increases in check. Upgrading the solution's commerce engine to WebSphere Commerce has delivered a wide range of benefits in this area. One of the most immediate benefits was the ability to replace a range of custom applications with WebSphere Commerce's out-of-the-box functionality, which enabled Goodyear to channel its resources to developing new services and applications. On the responsiveness front, WebSphere Commerce's strong J2EE support has allowed the company to rapidly and cost-effectively respond to dealer service requests by leveraging existing software assets and integration with SAP.

By enabling Goodyear to be more responsive to dealers, the Tire-HQ solution has strengthened the company's relationship with them, while at the same time strengthening Goodyear's internal processes. Goodyear's Hurley explains: "Tire-HQ, our WebSphere software-based solution from IBM, is playing an important role in building dealer satisfaction and enhancing productivity across Goodyear's supply chain. Features like realtime communication and order management add value while streamlining business interactions." This increase in dealer satisfaction, adds Hurley, has had a measurable impact on the company's top-line results. "We've had dealers who were looking at both a Goodyear tire and a lower-priced competitor's offering and chose ours because they would rather use the Tire-HQ solution. It's a function of the overall performance of the system, its efficient navigation and the fact that it's always available to them—24 by 7."

CASE EPILOGUE

Going forward, Goodyear expects continued growth in the number and richness of its dealer services, as well as a broader range of products offered and channels served. In the area of new services, the company now offers dealers the opportunity to upload orders from their internal systems directly into Tire-HQ—making e-business even easier for dealers. Toward the end of expanding its channels, Goodyear has begun working with large mass merchandisers to allow consumers to buy directly through in-store kiosks. Consistent with Goodyear's e-business strategy, the solution's strong support for open standards was a major facilitator of the initiative, which relies on XML-based integration between Tire-HQ and retailers. Goodyear also plans to add several Channel Management capabilities that leverage WebSphere Commerce's out-of-the-box features, including enhanced order management (in conjunction with SAP), analytics related to site usage, dealer profile information and presentation of dealer pricing.

With still more growth in user volume expected, Goodyear has also mapped out plans to further expand its solution using IBM eServer pSeries servers—taking advantage of the horizontal scalability the previous solution lacked. This includes a second DB2 database server as well as an additional server each running WebSphere Commerce and Lotus Domino. To further enhance the resiliency and performance of the solution, Goodyear plans to deploy advanced clustering software from IBM. Wernet believes that the company's investments in such on demand initiatives will continue to strengthen Goodyear's relationship with its



dealers and keep the company on course toward becoming an on demand business. "We've followed a steady upward trajectory toward becoming more responsive and easier to do business with," says Wernet. "Along the way, we've strongly benefited from IBM's leadership in the arena of on demand business."

02-04

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