

# UPGRADE!™

The business simulation game of strategy management and continual improvement.

by Nigel Hopkins

**UPGRADE!** is a challenging strategic business development game in which each player is managing a small industrial facility containing 4 business areas over a 6 year gaming period. You have some simple IT solutions in place but it's time to bring them up to date. Each year you take three actions to help you on your journey. It's up to you which actions you take, choosing from upgrading

your solutions, training more users, lobbying for more funding, tuning the solutions for better performance, creating reports to gain insight or integrating your solutions. Every year, the infrastructure fees are collected and revenue is received for trained users. Points are earned from upgraded solutions, tuned solutions, integrations and reporting on them.

## OBJECTIVE

The objective of the game is to achieve the greatest number of business value points after a 6 year gaming period. This is achieved through upgrading the solutions, integrating them and reporting on them.

Income is generated from the number of trained users you have in your facility. Additional financial support can be obtained by lobbying your management for commitment on your upgrades and connections.

## WHAT'S IN THE BOX?

85 Credit Chips

-  30 white chips (1 credit)
-  25 yellow chips (5 credits)
-  20 green chips (20 credits)
-  10 blue chips (50 credits)



Game-year pawn



4 100 BVP token



Main board



24 Solution upgrade tiles (2 x gold, silver and bronze for each of 4 solution areas)

20 Discs (4 per player colour + black)



16 Action markers (3 per player colour + spares)



24 Influence markers (6 per player colour)



2 Bonus action markers



1 bag (not shown)

32 commitment tokens



16 double-sided player boards (4 sets of 4 boards)

16 Tune tokens



Rules booklet contents

Page 1-2

Boards and Tiles

Page 3-4

SETTING UP

Page 5

SEQUENCE OF PLAY

Page 6-8

ACTIONS EXPLAINED

Page 9-10

Using the Worker track

## Main board

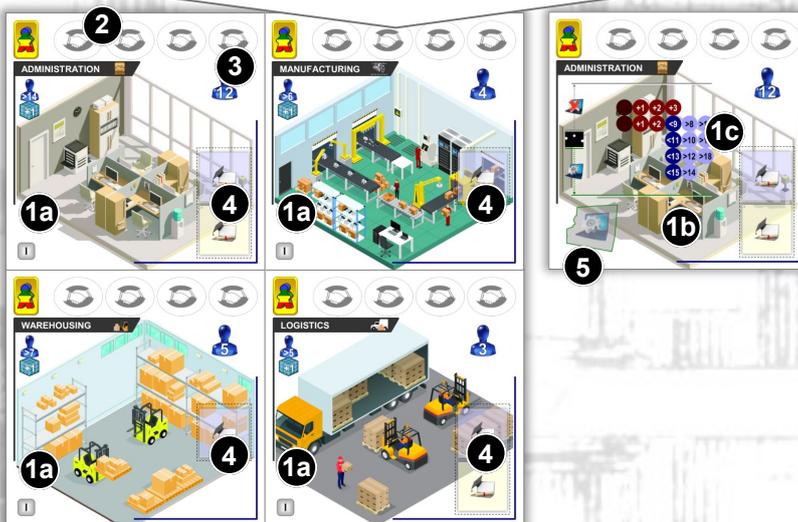
- The game-year track is used to control the progress of the game. It is split into three phases of play corresponding to the level of technological development (I, II and III).
- The user track runs along the top of the board. Each player has a disc on the track, used to show their current total user-group size.
- The Business Value Points (BVP) track runs up the side of the board. At any time during the game, a player can trade in one BVP for 5 credits
- The Worker track is actually two tracks. To the left is the active track used to monitor worker usage and cost as well as indicate which player is in control of the game. To the right is the Pass track on which players place their disc when they have no actions left or have decided to finish for the current year.
- The Solution upgrade tiles are arranged to the left. During an UPGRADE action, one of these tiles may be moved to a player's board.
- When not otherwise assigned, the players' influence tokens are kept in the "available influence" area.
- The INTEGRATE action has a track used to indicate the current level of integration achieved by each player. Each step on the track requires a certain minimum level of upgrades across the 4 business areas, indicated to the left of the track. To advance a step up the track, an influence token is placed on the step. Each level of integration adds one workload cube and earns 10 BVPs at the end of the game. The integration also contributes to reporting.
- There are six actions in the game, each having a blue "play action" area on which the players place an action marker either when planning the action or when taking the action. Four of the actions can be planned at the beginning of the year to get extra business value points. These four are indicated with a darker blue background and an associated icon.
- There are 6 bonus spots on the board. A player can claim the bonus by placing one of their influence tokens on the spot at the beginning of the year. Only one player can claim each bonus.



## Facility boards

Each player has four boards, one for each of their business areas; Administration, Manufacturing, Warehousing and Logistics. The boards show the size of the work-group currently trained within the business area and directly supports all of the actions associated with the business area; UPGRADE, TRAIN, LOBBY and TUNE.

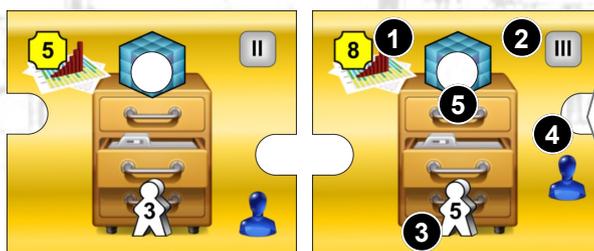
- Business area solution:** Each business area has its own board with each player having a set of four different business areas; Administration, Manufacturing, Warehousing and Logistics. Each board has two sides, one for the starting level I solution (1a) and the other for the upgraded level II/III solutions (1b). This latter side also contains a table used to show the current additional workload needed for any given user group (1c). The solution upgrade tile is used to indicate the number. When a solution is upgraded from level I, the board is flipped, along with any trained workers.
- User-group size:** The starting number of trained users in each business area is shown top right on each board.
- Commitment:** When an influence marker is placed top left of a board, commitment tokens can be added during a LOBBY action.
- Training new users:** During the course of the game, there is the option to TRAIN new users, extending the user-group size. When a new set of users is trained, a workgroup token is taken at random and placed on the board with the blue or yellow side uppermost, corresponding to the colour printed on the board.
- Tuning a solution:** It is possible to TUNE level II/III solutions to improve their performance and, in some cases, reduce their workload requirement. When a solution is tuned, a token is placed bottom left.



## Solution upgrade tiles

There is a set of solution upgrade tiles for each business area representing three solution variants; gold, silver and bronze. The centre of the tile contains an icon representing the business area for which it is a solution option. The tiles are 2-sided with the level II solution on one side and the level III solution on the other.

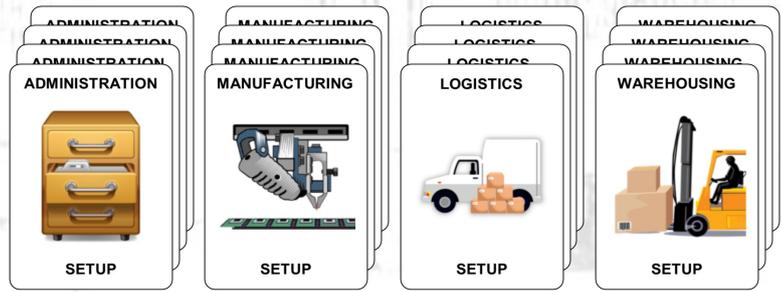
- Top left of the majority of tiles is a number indicating the amount of BVP gained when a REPORT action is performed on the solution area. The exception to this is the level II logistics tiles which reward the user with an influence token when first placed,
- The technical level of the solution is shown top right. Solutions are upgraded from I to II and from II to III.
- The number of workers needed to upgrade to the indicated type/level is shown bottom centre.
- The slot on the right is set to indicate the current user-group size category.
- The hole in the tile will indicate the additional workload needed for the solution when on the player board.



# SETTING UP

Place the main board in the centre of the table.  
 Place the credit chips and the 100-BVP tokens next to the board.  
 Place the blue user-group tiles in one bag and the yellow user-group tiles in the other.

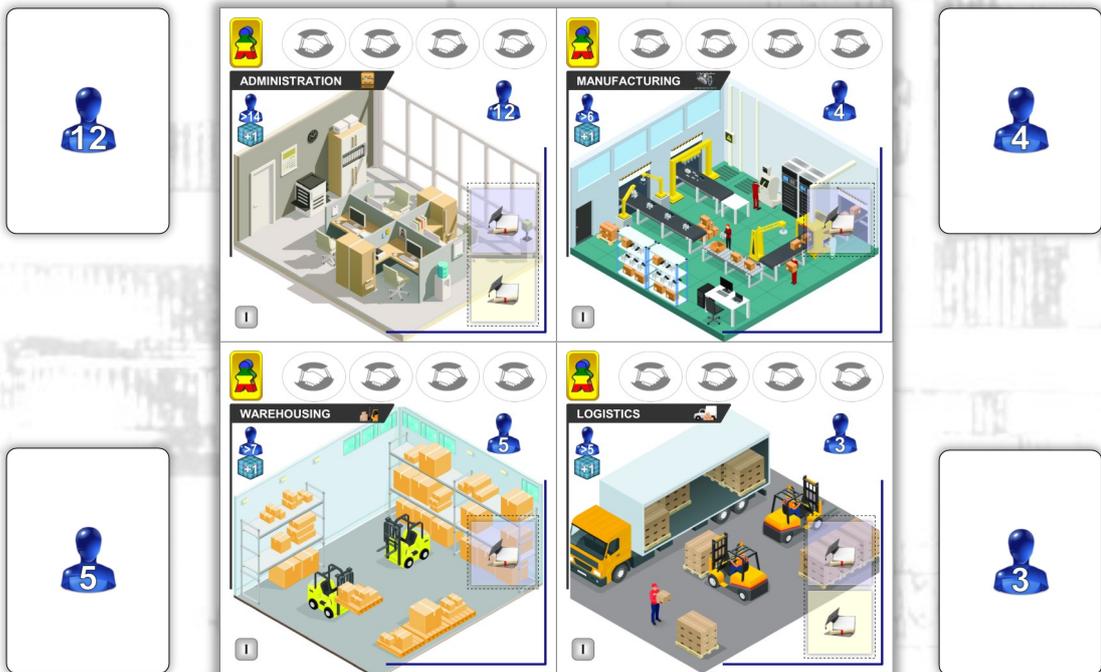
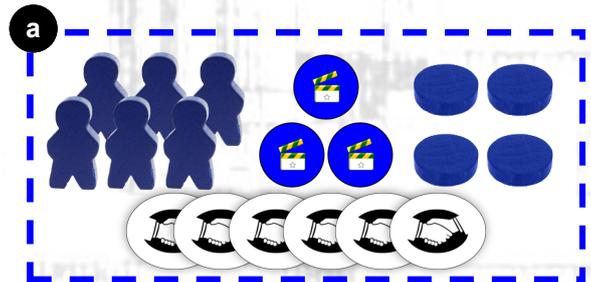
Separate the setup cards into four decks, one deck for each solution area; Administration, Manufacturing, Warehousing and Logistics. Shuffle each deck with the solution area name and icon visible and the user-group number hidden. Deal one card to each player from each deck. The card will show the starting user-group size. Each player takes four player boards corresponding to the user-groups shown on the four cards.



## Player board and pieces

Place your four solution area boards in front of you with the level 1 side upwards.

a. In the colour of your choice, take 6 influence markers, 3 action markers 4 player discs and 7 influence tokens. Place the influence markers and commitment tokens next to your board to form your supply. The action markers are also placed next to the board when not in use.



## Main board

- Place the game-year pawn on the "Setup" spot of the game year track
- Place the solution upgrade tiles on their corresponding locations with the level II side up. There should be 2 tiles on each position. Next remove a number of tiles from each stack according to the table below.
 

	Number of players		
	2	3	4
Bronze	-	-	-
Silver	1	-	-
Gold	1	1	-
- Place the bonus action marker below its bonus spot. This will be available to whichever player uses an influence token to gain the bonus,
- Each player places one of their 6 influence markers into the "available influence" area, leaving the other 5 by their facility board.
- Select a start player and beginning with the player to their right and moving anti-clockwise, each played places a disc on the top left (0) position of the worker track to form a single stack.
- Each player calculates their total user-group size by adding together the value of the 4 user-group tiles on their facility board plus the extra 8 for the Administration area. They then place a disc on the corresponding number on the user-track.
- Each player puts their last two discs on the two business value tracks (one on each).

You are now ready to play UPGRADE! Enjoy the game!

Each player places a disc on the user track according to the total user-group size represented on their boards.

Place the solution upgrade tiles onto their corresponding locations, level II side up, then remove a number of tiles according to the number of players

Each player adds 1 disc to the worker track at the "0" position

Put the game-year pawn to "Setup"

Each player places 1 influence marker in the "available influence" area.

Each player adds a disc to each of the two business value tracks

Place the bonus action marker here.

The diagram shows a detailed view of the game board with various tracks and areas. Callout 1 points to the 'Setup' spot on the game year track. Callout 2 points to the solution upgrade tiles. Callout 3 points to the bonus action marker. Callout 4 points to the 'AVAILABLE INFLUENCE' area. Callout 5 points to the worker track. Callout 6 points to the user track. Callout 7 points to the business value tracks.

# SEQUENCE OF PLAY

The game is played over 6 game years

## Start of game

- **Income:** Refer to the position of your disc on the user track. Receive 15 credits + 1 credit per user. So, with 22 users you would receive 37 credits.
- **Payment:** Each player totals up their workload cubes for their four solution areas. Pay 5 credits per cube.

## Start of year

- **Advance year:** move the game-year marker one step down the game year track, noting the game phase (II or III).
- **Maintain old solutions:** In phase III of the game (years 4, 5 and 6), for each business area that does not have a solution upgrade tile, you must use one worker for maintenance. Pay the cost and move your disc along the worker track.
- **Age commitment:** flip all commitment tokens to their red side.
- **Influence:** Beginning with the controlling player (see page 9) and moving clockwise around the table, each player may choose to take one of their influence tokens from the “available influence” area and place it on a vacant bonus spot. Any player gaining the bonus action takes the bonus action token from the main board and places it in front of them.
- **Planning:** Beginning with the controlling player, each player may place one of their available action markers, planning side uppermost (with the thick black edge), on a valid action in its “play action” area earning one business value point per placement. Each player can only have one marker against any one action. Continue to place markers until all players pass. The bonus action marker cannot be planned.



## Actions

Each player will have 3 actions, 4 if they have the action bonus. The controlling player either takes a planned action, an unplanned action, or passes. For each action taken, move your disc down the worker track according to the worker cost of the action and pay the fees due.



- Taking a planned action: Where you have an action marker with its planned side uppermost (the side with the black edge), you can perform that action and flip the action marker over.
- Taking an unplanned action: Take an action marker from in front of you and place it against your chosen action with the planned side down.
- Passing: This is the end of your year. Move your disc on the worker track to the right, onto the corresponding position on the “Pass” track.

## End of year

- **Income:** Refer to the position of your disc on the user track. Receive 15 credits + 1 credit per user.
- **Payment:** Pay 5 credits per workload for your four solution areas and for your integrations.
- **Planning penalty:** Lose one BVP for each of your planned action markers still on the board.
- **Receive business value:** Receive 1 BVP for each tuned solutions, also for each upgraded solution receive the following business value, according to type and technology level.

	BVP		
Technology level II	1	2	3
Technology level III	2	3	4

If the current game year is “6”, go to the “End of game” section below. Otherwise, continue with reset worker track, recover influence and recover action markers.

- **Reset worker track:** Working from the bottom of the worker track, take the discs one at a time (top one first), from their position on the “Pass” track to the corresponding position on the main worker track (see page 10). Whoever is highest on the worker track and at the top of the stack is now in control.
- **Recover influence:** Recover any influence tokens from bonus spots and return to the “available influence” area.
- **Recover action markers:** Each player gathers up their action markers from the main board and places them next to their facility board. If in play, the bonus action marker is returned to its spot on the main board.
- **Old commitment:** return any “aged” commitment tokens (red face up) to your supply.

## End of game

- **Convert credits:** Receive 1 business value point for each 10 credits in hand.
- **Integration bonus:** Receive 10 business value points for each influence marker in the integration section of the main board.
- **Old tech penalty:** Lose 10 business value points for any business area that has not had its solution upgraded (still at level I)

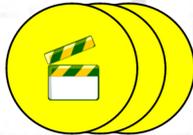
## Winner

The winner is the player who has generated the most business value. A tie is broken first by the player with the most integration, then by the one with the most total influence markers. If it is still a tie then congratulate each other and vow to do better next time you meet.

## ACTIONS EXPLAINED

There are two categories of actions in the game; those that are performed by you (LOBBY and REPORT) and those that are performed by the central support group using the worker resources tracked to the right of the main board. Only the actions performed by the central support services can be planned ahead of time.

At the beginning of the game, each player receives 3 action markers in their chosen colour.



### Planning an action

At the start of each year, if you intend to perform an UPGRADE, INTEGRATE, TRAIN or TUNE action in the coming year, you have the option of "planning" these actions. For each action you want to plan, place an action marker onto its blue "play action" area. The markers are placed with their planning side up, the side with the thick black border. Each player can only add one marker to each "play action" area.



Move one step up the business value track for each action planned,

When planned, the action marker can only be used against the designated action. If you cannot perform the planned action and you have no other actions left, you must "pass".

### Taking an action

When you take an action, either flip one of your planned action markers over and perform the corresponding action, or place one of your available action markers, planning side down, in the "play action" area corresponding to your chosen action.

### Penalty

At the end of the year, if you still have planned actions on the board, lose 1 BVP for each.

### Recovery

At the end of the year, recover your action markers, placing them next to your player mat. Also, if you had the bonus action, move your influence marker back to the available influence area on the main board.

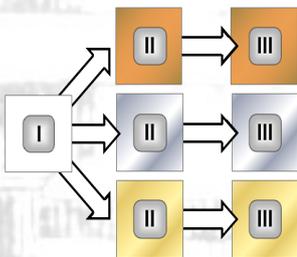


**Action bonus;** Receive bonus action marker for use during the current year.



## UPGRADE - can be planned

worker cost shown on Solution upgrade tiles



The UPGRADE action is used to upgrade the solution in one of your four business areas. A solution can't be upgraded to a level beyond the current game phase indicated by the year track.

### Taking the action

When you UPGRADE from level I to level II, flip over your solution area board. Select a solution upgrade tile, with an icon matching the business area, from those available on the main board and place it onto your solution area board so that the top edge lies on the grey line (1) and the indicated user-group category corresponds to the current user-group size (2). The number of workers needed to play the tile is shown in centre-bottom of the tile (3). The additional workload needed is visible through the hole at the top of the solution upgrade tile (4).

To UPGRADE from level II to level III, the Solution upgrade tile is flipped. The number of workers needed to upgrade from level II to level III is shown in the bottom left corner on the level III side.



### Transforming a solution

Once a solution upgrade tile has been put into play (bronze, silver or gold), it can be replaced with an available tile with the same icon but of a different colour. An UPGRADE action is required to transform from one colour to another and the new tile must be put into play at the same level as the previous one. The full upgrade worker cost, shown on the new tile, must be paid. The replaced tile is moved back to the corresponding stack on the main board.



**Bonus:** UPGRADE actions take 1 less worker than the value stated on the tile.

**LOBBY**

no workers needed



The LOBBY action has no worker cost and is used to get financial commitment, from the various business area managers, to improve their areas.

**Taking the action**

You can add up to 3 commitment tokens, from your supply, onto one or more business areas. To add commitment to a business area you must have one of your influence markers top left of that area. Place an available commitment onto a business area tile as needed. Add commitment tokens across the top of the tile; maximum 1 token in a business area with a level I solution or 2 tokens where there is a level II or III solution.



At any point during the game, you can redeem funds by recovering one or more tokens and returning them back to your supply. You receive 10 credits for each token recovered but this money must be used immediately to pay towards a cost associated with the corresponding business area - no change given.

An influence marker can be removed from a business area at any time, returning it to the "available influence" area. In this case, any existing commitment tokens on the original business area are returned to your supply—no money is received.



**Bonus:** During a LOBBY action, add an extra commitment token to any business area with an influence marker (unaffected by solution level).

**INTEGRATE - can be planned**

worker cost shown on main board



With the INTEGRATE action, you connect your level II and III solutions together, improving performance and providing more insight from reports. There are three levels of integration which must be taken in order; level 1 first, then level 2 and finally level

3. For level 1 and level 2, all your business areas must have a solution upgrade tile. Level 3 integration can only be played if all your business areas have a solution upgrade tile of technology level III.

**Taking the action**

After placing/flipping your action marker, place an influence marker in the lowest level not currently containing one of your influence markers. Pay the cost in workers shown to the right of the location; 4 workers for level 1, 3 workers for level 2 or 2 workers for level 3.

*NOTE: If you are using commitments to cover the cost of workers, you can only recover 10 credits (1 space) in each business area.*

**Reporting**

For each influence marker a player has on the integration track, an extra solution is included in the REPORT action. For example, if you have 2 influence markers on the integration track (level 2), you can REPORT on 3 solutions (1 + 2 extra).

**End of year**

Each integration level adds one workload cube to the total from your business areas.

**End of game**

You receive 10 business value points for each influence marker on the integration track.



**Bonus:** INTEGRATE actions take 1 less worker than the value stated on the board.

**TRAIN - can be planned**

1 worker



The TRAIN action costs 1 worker and allows you to extend the user-group in one of your business areas. Training also gives you influence.

**Taking the action**

After placing/flipping your action marker, take a user-group tile from the bag and place it onto an available spot in a business area being sure to match the tile's

background colour (yellow on yellow, blue on blue). This increases the user-group size for the business area. Adjust the position of the solution upgrade tile as necessary. Move your disc along the user track to your new total user-group size and place one of your influence markers from your supply onto the main board in the available influence area. The number of influence markers is limited but you can still perform this action even if you have no remaining influence markers.



## TUNE - can be planned

1 worker



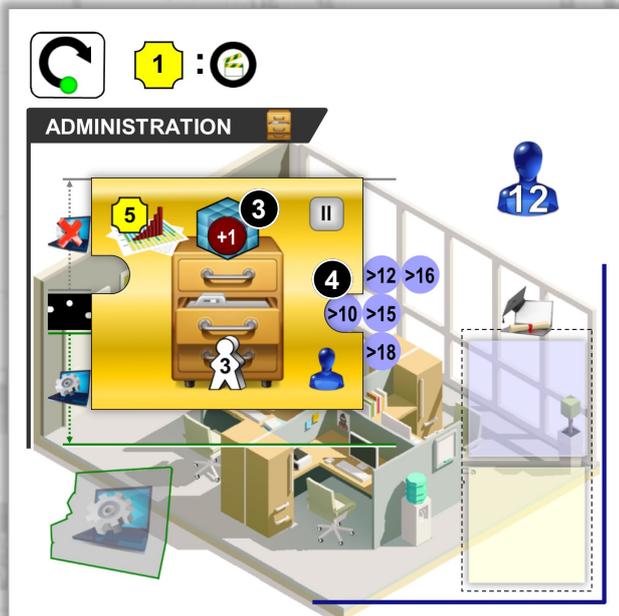
The TUNE action represents changes made in the solution to improve its performance. The TUNE action may also reduce the workload required for your user-group. The TUNE action is not available for level I solutions.

In the example below, the administration business area has a gold level II solution in place with an indicated additional workload of “+1” (3) as the user-group size falls under the “>10” category (4). After the TUNE action has been performed, the solution upgrade tile is moved down to rest on the green line and now will connect with the “<13” category (5). There is no y additional workload after tuning (6).

### Taking the action

Place a tuned token onto your chosen solution area board (1). Move your solution area tile so that the bottom edge lies along the green line as indicated on your board (2). Adjust your solution upgrade tile to indicate the current work-group size.

BEFORE



AFTER



## REPORT

no workers needed



The REPORT action represents analysis and reporting of the solution data across the active business areas to gain insight and business value.

receive the amount of business value shown top left of any three of your solution upgrade tiles.

If you have taken all three steps of integration, you receive the amount of business value shown top left of up to four of your solution upgrade tiles.

### Taking the action

You can only take this action once per year. If you have not yet integrated, you receive the amount of business value shown top left of any one of your solution upgrade tiles.

If you have taken one step of integration only, you receive the amount of business value shown top left of any two of your solution upgrade tiles.

If you have taken two steps of integration only, you



**Bonus:** Receive business value for one extra tile as well as those to which you are entitled. No tile can be counted twice.

# Using the Worker track

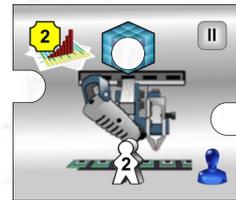
**NOTE: The controlling player is the one highest up on the worker track and topmost in their stack**



2

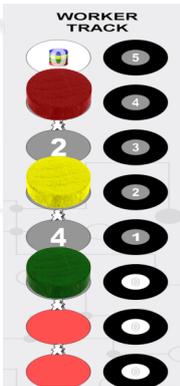


Yellow plays an UPGRADE action to the Manufacturing business area, flipping the business area board, adding a silver Manufacturing solution, moving 2 worker steps and paying 20 credits. Green is now in control.

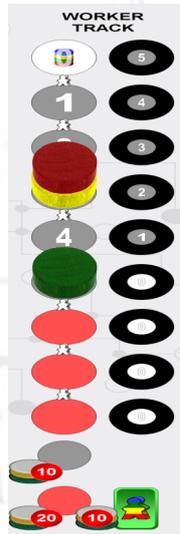


All 4 players have played 1 TRAIN action, each advancing one step down the worker track. Each has paid the corresponding 10 credits and placed an extra influence marker into the "available influence" area. Yellow is now in control of the game.

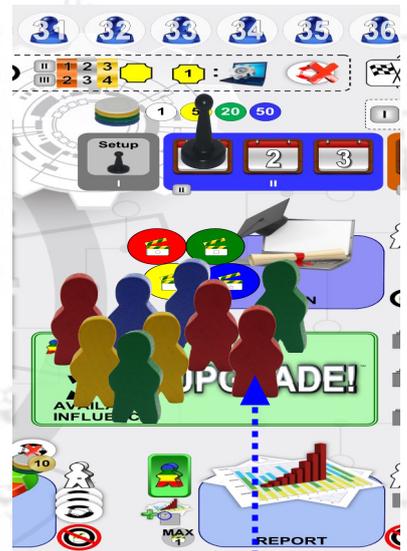
3



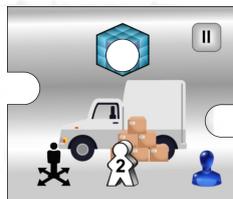
4

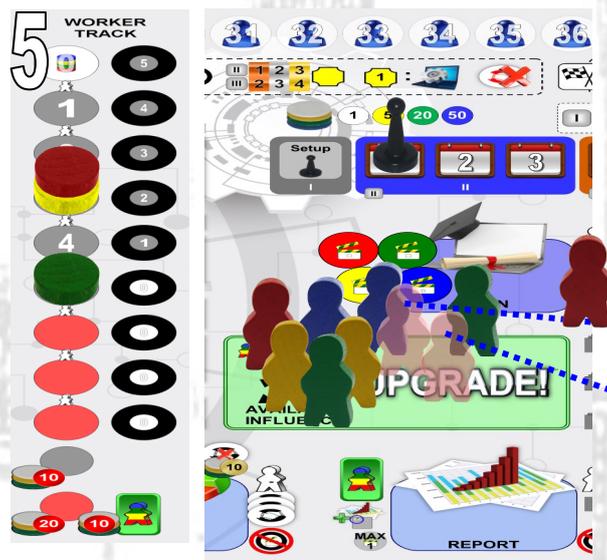


Green plays an UPGRADE action to the warehousing business area, flipping the business area board, adding a gold Warehousing solution, moving 4 worker steps and paying 40 credits. Red is now in control.

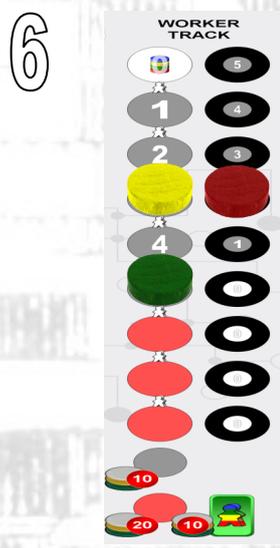
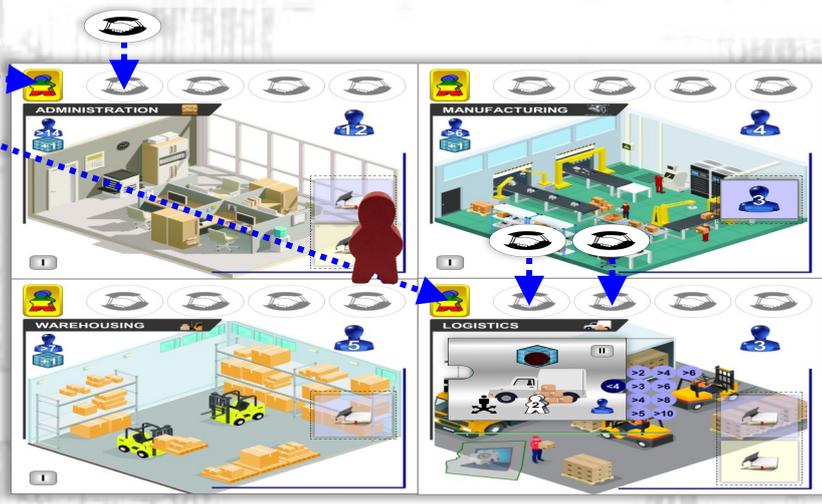


Red plays an UPGRADE action to the warehousing business area, flipping the business area board, adding a silver Logistics solution, moving 2 worker steps, paying 20 credits and also gaining an extra influence token to place on the main board. Red is still in control.



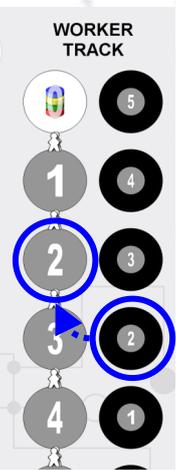


Red decides to LOBBY. She has 3 available influence tokens, one from the start of the game, one from the first TRAIN action and one from the UPGRADE action. She uses 2 of these to place influence in the Administration and Logistics areas. She adds 1 commitment marker onto the Administration board and 2 onto her Logistics board (since this has a level II solution).



Red is still in control of the game but, having taken 3 actions, has no more to take so must pass. She moves her disc to the right onto the "Pass" track. Yellow now takes back control.

### A closer look at the Worker track



The main worker track is to the left. Each step down the track corresponds to one worker. Where, for example, an action needs 3 workers, this translates to taking 3 steps down the worker track. There are 5 grey positions and 3 red positions. The grey positions indicate planned time and the red indicate unplanned time. Whilst paying for needed workers, whenever you move to/through a grey position it costs you 10 credits, moving to/through a red

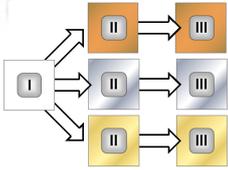
position costs you 20 credits. The "Pass" track is to the right of the Worker track. Each position on the "Pass" track has a printed number in its centre. This number indicates the position on the main worker track to which a disc is moved at the end of the year. In the example above, the red player would move her disc to the "2" position on the worker track during the "Reset worker track" step at the end of the year.

**Unplanned worker bonus:** Red worker steps cost you 10 credits instead of 20 credits during the current year

# ACTIONS summary

## UPGRADE

2-5 workers + cost



### Upgrade your solutions (page 6)

If you have no solution upgrade tile in place on your chosen business area flip the business area board and add the tile of your choice (gold, silver or bronze), for

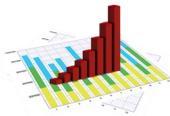
that business area with the level II side up. Pay the worker cost shown. You can upgrade from level II to III by flipping the tile and paying the worker cost shown. You can transform a solution by replacing its upgrade tile with one of a different type (colour) but at the same level. Pay the worker cost shown on the new tile and return the replaced tile to the main board. Be sure to adjust your solution upgrade tile to the correct user-group category.



Bonus: UPGRADE actions take 1 less worker than the value stated on the tile.

## REPORT

No workers needed



### Report on your business areas (page 8)

Receive the amount of business value shown top left of your solution tiles. Receive for 1 tile and for an

additional tile for each level of integration.



Bonus: Receive business value for one extra tile as well as those to which you are entitled. No tile can be counted twice.

## TUNE

1 worker + cost



### Tune a solution (page 8)

For the chosen level II or III solution, add a tuned token and align the solution upgrade tile's bottom edge to the green line, repositioning as needed.

## LOBBY

No workers needed



### Get management commitment (page 7)

Add up to 3 commitment tokens to business areas where you have influence. Only add 1 token at a business area without a solution

upgrade tile, otherwise add up to 2 tokens. Recover commitment tokens back to your supply to gain 10 credits per token. Commitments can only be used against actions performed in their associated business area.



Bonus: During a LOBBY action, add an extra commitment token to any business area with an influence marker (unaffected by solution level).

## TRAIN

1 worker + cost



### Add a new user-group to one of your business areas (page 7)

Take a user-group tile from the bag and place it onto an available location in one of your business areas, being sure to match the tile's face colour. Add an

influence marker to the "available influence" area, advance along the user track by the number trained and adjust your solution upgrade tile positioning as needed.

## INTEGRATE

2-4 workers + cost



### The INTEGRATE action sets up connections between your business solutions to improve your reporting capabilities (page 7)

Place one of your available influence markers on the next level of integration

paying the worker cost shown next to that level.



Bonus: INTEGRATE actions take 1 less worker than the value stated on the board.

## Other bonus spots



**Action bonus;** Receive the bonus action marker for use during the current year.



**Unplanned worker bonus:** Red worker steps cost you 10 credits instead of 20 credits during the current year

