

CASE STUDY

QuantumPM Helps Energy Company Streamline Their PMO Status Reporting

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What used to take 20 or more hours per week is now kicked off with one mouse click. Senior decision makers now have more time to analyze the data rather than create reports. The data they are reviewing has a higher confidence level for accuracy and company leadership is very comfortable with relying on the information to make key business decisions.

Energy Company Challenge

A large gas and electric energy company serving multiple states and millions of customers has a growth strategy that focuses on the modernization and replacement of its utility infrastructure, paired with complementary system expansions, customer programs and regulatory initiatives. The company is investing in electric system environmental upgrades and transmission expansions; natural gas system replacements and expansions; and enhancement of customer services.

The company has many vendors who are involved in supporting this modernization program and each of them has its own systems to manage and report on their projects. In addition, the company uses Microsoft Project Server for many internally managed projects to collect project schedules and artifacts in a common place.

To stay on track with their goals and objectives, the company performs extensive analytics on projects each week to determine project progress, use of resources, and future resource requirements. The analysis is in the form of a 20-page weekly status document used by senior leadership for portfolio oversight of major capital-intensive projects and to determine the future spend and resource requirements for a 2-3 year look ahead.

The company faced many challenges with their reporting process as the work required a minimum of 20 hours each week to pull the data from the numerous different sources (a significant amount of which were spreadsheets), assemble it, produce the desired tables, charts and graphs, and review for accuracy. There were lots of manual steps involved to filter the data and get the data to a point when it could be properly displayed in the required format, with detailed adjustments made by hand for the errors and exceptions visually identified. Report preparation also involved several internal meetings each week just to keep things coordinated. Once prepared, the reports were then distributed to individuals via email, which took more time and effort. This process was repeated weekly. As you might imagine, errors were commonplace.

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Enter QuantumPM

As the company's PPM partner, QuantumPM reviewed the company's manual report generation procedures and analyzed the data and data sources consumed in the production of the reports. After breaking the process down into logical components, QuantumPM designed a brand new reporting solution. The goal was to develop a simplified data model to support and improve upon the existing queries, calculations, and exception handling of the report structure. Once implemented, the new model would remove the need for manual intervention in the reporting process by automating the output, formatting and data validation.

QuantumPM presented the company with their Software-as-a-Service (SaaS) platform called **BIAdvantage** as a unique tactical business intelligence opportunity for the company to automate their weekly reporting, streamlining the process, reducing errors and improving the reliability of the data.

BIAdvantage is a cloud-based SaaS solution. Its easily customizable rules engine lets users measure and monitor the data that is critical to making important business decisions within their unique organization. **BIAdvantage** offers a lower total cost-of-ownership than other BI products on the market by reducing the reliance on internal IT resources, eliminating hardware and upgrade costs, and allowing for rapid deployments and upgrades.

The software extracts essential information from key on-premise and cloud sources, provides the data to other applications, and creates actionable insights. Because users can capture accurate organizational information in a single BI platform, they gain a better understanding of key business indicators. This creates a nimble organization that is able to respond to an ever-changing market place.

BIAdvantage is not an out-of-the-box product that forces users to utilize "canned" templates and report formats. It includes a cloud-based rules engine that allows QuantumPM to create business rules that meet its customers' specific requirements. The software also provides for the continual improvement of organizational processes by identifying problem areas and then feeding that information back into the organization providing actionable opportunities to evolve and facilitate change.



The Solution

QuantumPM worked with the energy company's corporate team to implement the **BIAdvantage** platform. Criteria and business rules for data selection from the various systems were established. The logic was modeled in **BIAdvantage** and tested in parallel with the manual process. Several errors in the manual process were identified during the testing process that had been actively used in decision-making processes. The process problems were corrected providing the company leadership with high confidence that they could rely on the information to make key business decisions.

Once the new solution was certified, it went into production with no errors. The company now has a flexible platform that allows for the accurate compiling of key data, and by removing the manual processes, improved quality, timeliness and cost effectiveness of data analyses.

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"This solution simplifies the joining of data from multiple sources into a single data model, without us needing to manually filter or heavily manipulate the data."

K.S.
Project Manager

The Results

With their custom **BI Advantage** solution in place, the Gas and Electric Company can produce their graphically intensive set of project status reports automatically, without human intervention. What used to take 20 or more hours per week is now kicked off with one mouse click. The solution provides automatic validation and consistency checks resulting in the elimination of errors and saving over a thousand hours/year for data compilation. This allows the data analysts to focus their time on the analysis rather than data entry and report creation.

Because the manual element was removed from the process, and the solution includes built in checks and corrections, the consumers of the reports now have a higher confidence in the accuracy of the data. The company's leadership is very comfortable with relying on the information provided to make key business decisions.

In addition to making their data analyses more efficient and accurate, BI Advantage provided the Gas and Electric Company with a flexible platform that can be further expanded to accommodate other reporting templates and formats. There are future plans to extend this solution to other divisions, eventually making it a company-wide standard.

"We look forward to working with QuantumPM in the future to grow this solution to include the reporting requirements of other teams, enabling them to quickly adopt a solution that will help us more efficiently consolidate, visually represent, and analyze data throughout our entire company," a key stakeholder noted.

For More Information

For more information about **QuantumPM** products and services, call (720) 221-5471 or visit our Web site at: www.quantumpm.com

