2021
CASE STUDY

Promoting an owner's mindset in IT

THE SITUATION

> '**This is a highly sensitive project where failure to report accurately is not an option.' – National Leading Utility Company**

National Leading Utility Company saw an opportunity to synchronize the reports to one set of data instead of 5. Additionally, there was a desire to streamline the approach to variance reporting across business lines. **This was a highly sensitive project where failure to report accurately was not an option**.

The 'Run IT as a Business' report is an in-depth analysis of the spending patterns of **150 IT projects in a $600 million annual portfolio**. The report and charts are disseminated and discussed with 5 VP's, 20 directors, 80 project managers, and approximately 80 financial analysts each month. Building the Run IT as a Business report took approximately 4 hours or more each iteration, 5 times per month. The overly complicated process was brought with errors. Each iteration of report creation took over 50 steps—most were manual.

Reporting was further complicated by multiple data sources handled by four separate IT Planners. The IT planners were required to draw information from over 40 project teams over multiple days. Often the data was extracted from other systems which caused version control issues and data integrity issues.

THE SOLUTION

Business Intelligence

Partners aligned on the single data source for all reporting. Within 60 days, a functional report that imitated the outputs of prior reports would be built, including an integrated variance analysis section that would import project team-provided explanations. This was approached as an opportunity to apply **business intelligence** and **process improvement methodologies** in a streamlined, value driven fashion.

Greencastle redesigned the report generation process with complex data modeling that handles all the required calculations. The report is created through a 20-step checklist which is primarily extracting data from the source systems and pasting it into various tabs of a workbook with push-button update functionality.

Change management was implemented to lead project teams to embrace the solution as a "simpler, easier" method with a kick-off meeting and reinforcement leading up to the implementation.
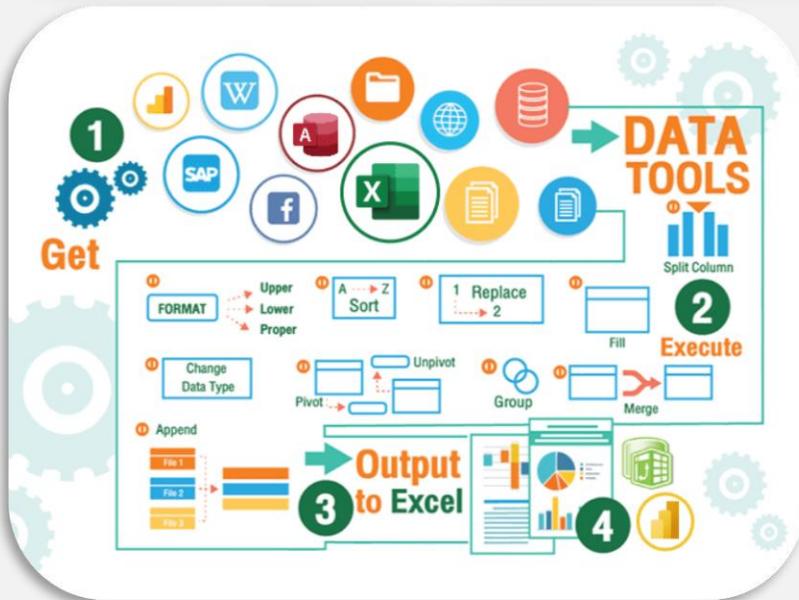
RESULTS & BENEFITS

1,146
hours saved annually

0
3rd party updates required. Project teams own their data

3
Executives receive their reports 3 days earlier

New Process with ACCURATE results!

Business Intelligence

Greencastle's Business Intelligence analysts integrated multiple data streams using **Power Query** as the modelling tool to present multifaced views of the client's data. These views supplanted the prior functionality with higher fidelity reporting. This upgrade, capable of drilling to individual data points, has **improved client analysis** as well as source systems defect identification and resolution, and has made a deep impact on their financial reporting and analysis. This client is now **capable of easily visualizing the data, discovering what's important, and sharing it with anyone they choose** - from VP to Analyst.

COMPANY PROFILE

Greencastle Consulting is 100% Veteran-Owned and operated implementation consulting firm that is unique in its approach to mission-critical projects. We combine the best practices of change management, process improvement and project management with Greencastle's 6 rights of implementation into one methodology.

Using our implementation management methodology as the foundational approach to each project has enabled our clients to successfully meet the challenges of an ever-changing business landscape.

Military Precision: Founded on a strong military background, Greencastle has been providing customized, metric-driven results to Fortune 500 companies for over 20 years.

Data Driven: We have completed well over 350 projects since 1997; most are large scale and complex—keeping people and the process top of mind. We consider every project a data project.

We love challenges. We turn our client's mission-critical strategic initiatives into outcome focused projects. The fun projects are the ones that have never been attempted.