

Case Study:

Data Warehousing and BI Reporting Energy Production, Marketing, and Trading

About Experis

Experis is a leading provider of customized IT staffing, technical and business process solutions with offices across major markets in the United States, Canada and Europe.

Now a ManpowerGroup company, Experis leverages their expertise by providing clients with a single source solution for highly skilled talent and technology solutions in the areas of IT, engineering, finance and healthcare.

Client Situation

The client, an owner and manager of physical power generation plants, provides energy marketing, energy trading products, and services throughout the United States and Canada. In this extremely complex, dynamic industry, plant operations and trading positions must be continually managed to maximize profitability and mitigate risks. Accurate, timely information is critical to the company's success and profits.

The client's previous operational software was either home-grown, relatively new, or inconsistently deployed. Inflexible analytical and reporting software could not fulfill all of their reporting and broader informational needs. Further complicating the situation, the client was migrating to new software that would improve management capabilities, but did not properly support profit and loss analysis. Our client desperately needed to integrate data from several disparate systems for their decision-making.

Prior to the Experis BI team, the client had engaged two other firms to deliver their needed data warehouse capabilities. Both prior attempts failed, resulting in lost time, lost money, and no usable components. The client's new data warehouse was struggling to maintain credibility and sustain the confidence of their project stakeholders. Realizing that something needed to change, the client made one final attempt to fulfill their original business objectives, and engaged Experis BI.

Our client was looking for an experienced consulting partner that could deliver. Specifically, they desired a consulting partner with:

- Specialization in BI/DW solutions
- Proven experience and success on similar projects
- Ability to manage a project successfully
- Proven best-practice project methodology specific to data warehousing
- Abilities to engage and mentor client staff
- Ability to staff any position related to a BI/DW project

Once the partnership began, the Experis BI team found additional issues, including:

- A lack of data warehousing experience in key roles assigned to the project
- Poor quality source data and users struggling to reconcile differing versions of that data
- Recently purchased Informatica and Business Objects software for which staff had received training, but lacked any real practical experience
- A lack of adequate requirements proved by business users
- No consensus within the company on what the long-term DW architecture should look like



Experis™ IT

Experis Solution

Experis BI initially performed an assessment of the client's data warehouse practices, methodology, and organization. The Assessment compared processes, documentation standards, and organizational structure with industry best-practices.

This Assessment process identified:

- The technology, resources and processes needed to implement a robust data warehouse solution
- The specific client benefits to achieve
- Specific actions to bring the organization in line with best-practices
- The criticality of a data warehouse-specific project methodology to combine Experis BI's proven methodology with client-specific needs
- The optimal organizational structure, including roles and responsibilities needed to build and sustain the data warehouse solution
- The critical staff education and mentoring needed for project success

The Experis BI practice team then engaged the client in strategic planning for the data warehouse solution because a lack of comprehensive, long-term planning had been the principal cause of prior failures. This strategic planning resulted in the delivery of a data warehouse architecture, project roadmap, staffing plan, budgeting guidance, and an infrastructure/technology plan.

As Experis BI began to develop the client's new project roadmap, they also provided leadership and project management with specific expertise in data warehouse projects. The initial project delivered a central data warehouse and necessary foundational components including process control, data quality routines, notification processes, and reusable Informatica transformations.

In short succession, the Experis BI practice team delivered data marts with robust reporting and analytical capabilities for key subject areas:

- Deal profit and loss
- Trading position and risk
- Deal pricing
- Index analysis
- Human Resources
- Payroll

During these projects, Experis BI provided:

- Project management
- Senior leadership, including DW architect, Data Architect, and ETL Architect
- Technical staff: Data Analysts, ETL Developers, BI developers, data modelers
- Mentoring of existing staff throughout the project
- A data warehouse-specific project methodology

Each project delivered ahead of schedule and within budget. The Experis BI team achieved success by:

- Mentoring client staff on tools and data warehouse concepts
- Deploying the client's new data warehouse project methodology
- Training all staff on methodology and warehouse processes
- Working side-by-side with internal staff to minimize unnecessary knowledge transfer

Two years after the initial engagement, the client again approached the Experis BI Practice group to architect a new roadmap and manage the resulting projects. Experis BI conducted an assessment of the client's current situation, but recommended that they NOT engage in any new warehouse or analytical projects until various internal and external issues were resolved.

They instead provided recommendations of what to change in the client's technical and cultural environments before beginning new projects. Based on these recommendations, the client took time to clear obstacles, and one year later again requested Experis BI's partnership.

The client continues to engage the Experis BI practice for data warehouse projects. Recent additions include:

- Plant generation analysis
- Plant fuel analysis
- Plant lost opportunity and event analysis
- ISO reporting
- FERC reporting
- Back office reconciliation and reporting
- Consolidated financials reporting and analysis (GL, AP, AR, PO)

The client's data warehouse environment uses the following technologies:

- Data warehouse technologies:
 - Informatica PowerCenter
 - Business Objects
 - Oracle RDBMS
 - Erwin
- Business technologies:
 - Endur
 - nMarket
 - Oracle E-suite
 - Peoplesoft

Client Benefits

By the end of this engagement, the client had received effective project management expertise throughout the lifecycle of the project and technology specific training material coupled with a mentorship program which included processes and procedures developed and tailored specifically for each of the state's corrections and rehabilitation facilities work environment. In addition, Experis trained five existing state staff members to perform ongoing Subject Matter Expert roles to ensure consistent ongoing coaching, mentorship, basic software and hardware maintenance, and troubleshooting services following the completion of the engagement.

Specific services included:

- Resource management of 61 on site representatives/trainers/team leads
- Project management of multiple project phases (statewide deployment) that included incarceration and medical records implementation
- Recommendation and implementation of new business processes flows at each correction and rehabilitation facility
- Train the trainer approach used to ensure client developed and maintained Subject Matter Experts at the close of the engagement
- Efficient and effective resource management which allowed the engagement to complete on time and on budget

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