



STRATEGIC BUSINESS
SOLUTIONS

Case Study

How Change Management contributed to the success of innovative solutions by the Data Strategy & Management Team for Portland-Based Electric & Gas Company repair dispatch staff and power operations.

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Introduction

Portland-based Electric & Gas Company is a Fortune 1000 public utility company that serves over 900,000 customers in Oregon. The Data Strategy & Management (DSM) Team is responsible for developing and implementing data-driven solutions that support the company's business goals and enhance customer experience.

In this case study, we will highlight three projects that our team delivered in conjunction with the DSM Team showcasing our expertise in organizational change management, project management, and communication.

Project 1: New Application for Repair Dispatch

The repair dispatch process at the Company involved multiple manual steps and legacy systems that resulted in inefficiencies, delays, and errors. The DSM Team was tasked with creating a new cloud-based application that would automate and streamline the process, reducing dispatching time and improving service quality.

We followed an Agile methodology and collaborated with a cross-functional team of project manager, developers, and business analysts. The team adopted an iterative design approach, soliciting feedback from end users and stakeholders throughout the development cycle. The team also aligned with leadership and planned and implemented a change management plan, which included the following activities:

- **Communication:** We communicated the vision, benefits, and progress of the project to the end users and stakeholders, using various channels such as email, newsletter, intranet, and town hall meetings.
- **Training:** We created a Job Aid that explained the features and functions of the new application and conducted in-person training sessions for 12 dispatchers who would use the application on a daily basis.
- **Metrics:** We tracked and measured the success of the project using key performance indicators (KPIs) such as dispatching time, error rate, customer satisfaction, and adoption rate.

The new application was successfully launched and received positive feedback from the end users and stakeholders. We also participated in the planning and implementation for a scaled approach to expand the use of the application to other parts of the organization.

Project 2: Forecasting Tool for Power Operations

The Power Operations group at the Company needed a forecasting tool that would help them optimize the generation and distribution of electricity, based on various factors such as weather, demand, and market prices. Our staff were hired as project managers for this project, which also involved a cross-functional Agile team of internal data scientists and data engineers.

The project faced some challenges in the initial stages, as the business partners were not satisfied with the scope, timeline, and deliverables of the project, and were considering withdrawing their support. Our team intervened and successfully established communication and cohesion between the teams, by doing the following:

- Stakeholder analysis: The team identified and mapped the key stakeholders and their roles, interests, and expectations for the project.
- Scope management: The team clarified and documented the scope of the project, including the objectives, deliverables, assumptions, constraints, and risks.
- Timeline management: The team created and maintained a realistic and feasible project schedule, using tools such as Gantt charts, work breakdown structure, and critical path analysis.
- Risk management: The team identified and assessed the potential risks that could affect the project, and developed mitigation and contingency plans.
- Communication management: The team communicated regularly and effectively with the stakeholders and the team members, using various methods such as status reports, meetings, and dashboards.

The project stayed active and on track, thanks to these efforts. The delivery of the forecasting tool is on time and set for April 2024.

Conclusion

The team demonstrated skills and expertise in delivering solutions that added value and impact to the Company's business units and customers through. The team also showed their proficiency in organizational change management, project management, and communications, which were essential for the success of the projects. The team received recognition and praise from the leadership and the stakeholders and established themselves as a trusted and reliable partner for the Company.



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