



Microsoft  
Project Online

## Overview

**Country or Region:** United States

**Industry:** Energy – Oil & Gas

## Customer Profile

The client is a global company devoted to exploring oil, gas and energy solutions.

## Business Situation

The client wanted a comprehensive solution for demand, project and portfolio management to improve decision making.

## Solution

With help from Microsoft Certified Partner DeltaBahn, the client implemented Project Online.

## Benefits

- Single source of truth
- Increased data density for accurate reporting
- Power BI historical and projected reporting
- Form-controlled Demand Management Process
- Consistency and transparency over the portfolio at any point in time
- End-to-end Project Management Process with approval gates in line with the clients' PM Methodology and the PMI PMBOK

## Oil & Gas company improves its decision-making process with an end-to-end Demand, Portfolio, and Project Management solution

The Fortune 500 oil & gas company wanted to improve the visibility across IT while at the same time advance the project managers' ability to follow Project Management Processes as defined by leadership. It desired to increase the accuracy of information gathered and analyzed throughout the demand management process and to track all projects from demand through project closure. With the help of Microsoft Certified Partner DeltaBahn, the client implemented a solution based on Project Online to satisfy the needs of their IT Leaders to select and monitor projects as well as guide the project managers to increase project delivery. Power BI reporting enables Directors, Portfolio Managers and Project Managers to view historical and projected data from different angles.



Project



## Situation

The oil & gas company is a leading global independent energy company engaged in the exploration and production of crude oil and natural gas. Its' portfolio consists of unconventional and conventional sources; U.S. and international; and onshore and offshore.

Different departments in IT perform different types of projects to support core business processes, supplemental processes and innovation processes. The variety and divergent goals of each of the departments resulted in various approaches for measuring success. The PMO wished more objectivity in project selection and delivery. Increasing transparency into those processes, raising the level of individual accountability and increasing the maturity of the IT organization were emphasized objectives.

Data collection for demand occurred manually as requested by leadership to analyze prospective projects individually. Data was compared through multiple spreadsheets that were sourced from a content management system. Due to many exceptions to this process, the need for a formal process institutionalization arose.

The client already had a strong and company-specific project management framework in place which was lacking systemic support. It based on the Project Management Body of Knowledge (PMBOK) and, at the same time branching into agile project management, methods depending on the use case. The tools given were proprietary with only little control or incentives over the project lifecycle. Implicitly, the expectation was that project managers follow the process. The manual effort and informal guidance with multiple exceptions revealed the need for process support with a dedicated project management solution, as reporting was neither accurate nor comprehensive and the Portfolio Manager followed up offline with most of the Project Owners.

## Solution

The company worked with DeltaBahn, a Microsoft Certified Partner based in Houston, Texas. The decision was made to stepwise implement functionality with increasing complexity to raise the overall maturity of the clients' IT and PMO.





The first step was the design, implementation, and institutionalization of the Demand Management Process with a form and workflow solution in SharePoint and Portfolio Analysis of Project Online, while taking into account the end of the project lifecycle.

Next, the initiative was focused on the delivery of an approved project. The clients' PM Methodology was refined to fit the support that the comprehensive Project Online workflow provided. Particularly, the multiple approval steps and training in scheduling projects in Project Online increased data accuracy.

Finally, directors and other leaders requested reporting, which was realized in Power BI.

### Benefits

The clients' IT organization is using Project Online to provide a single source of truth for all IT project stakeholders, increase the level of comparable data density for accurate reporting, support decision-making in demand and portfolio management with a portfolio analysis, conduct end-to-end project management for all IT projects and provide consistency and transparency.

#### Single source of truth

Project Online holds all demand records for the clients' IT organization with a workflow for annual and off-cycle demand. Demand that is approved as projects finds its way in an end-to-end controlled project delivery process in Project Online.

#### Increased data density for accurate reporting

The demand management process was reengineered to allow for comparison of relative values of the demands through a Project Online portfolio analysis with qualitative and quantitative measures. The demand form solution that collects all demand data facilitates the transition into a project if approved. Each workflow stage is in accordance with the PMO Project Management Framework and facilitated by customized forms, guidelines, checklists, and a comprehensive workflow from project initiation through closure.

#### Power BI historical and projected reporting

Decision-makers over portfolio budget and resources requested a solution that serves as a basis of weekly status reporting as well as 3 months forecasts. It was realized using PowerBI with Dashboards and Reports for every group of stakeholders (Directors, Portfolio Managers,





Project Managers). Leadership has easy access to a dashboard presenting current, comparable project data from multiple perspectives.

### Demand Management with Portfolio Analysis

The complexity of the new demand management process allows for comparison and merit-based selection of demands to be funded and get resources allocated to. The extensive guidance on the new process is supplemented with training for demand entry, portfolio management, project management and workflow guidance materials. The person that enters the demand, the approvers, as well as the Demand Portfolio Manager, have transparency into the requirements and factors contributing to demand selection.

### End-to-end Project Management Process with approval gates in line with the clients' PM Methodology and the PM BOK

A comprehensive workflow was built, accommodating different types of projects that are comparable in project performance on their KPIs, like schedule, cost and scope variance. Project Managers are guided by supporting materials at each stage of the project to fulfill requirements of different stakeholder groups before advancing the project to the next stage. Portfolio Managers have an overview of all projects and can group them in the dashboard views as desired. Involved stakeholders are either notified by the workflow or included in an approval task to ensure the integrity of the project progress and data.

### Consistency and transparency over the portfolio at any point in time

Both leadership as well project managers, have dashboard views that improve the detection of potential issues early. Proactive measures can be taken on every project that advances stages too fast or remains in one stage for too long. In addition, major upcoming project dates are visible across the portfolios. The portfolio dashboards as well as snapshots of the demand form can be extracted from the system to make it available to a broader audience.

The various IT departments had different ways of delivering and reporting to the business. By bringing everyone into one system the clients' PMO provides visibility and consistency across the IT business unit.

### Microsoft Project Online

Project Online is a flexible online solution for project portfolio management (PPM) and everyday work. Delivered through Office 365, Project Online provides powerful project management capabilities for planning, prioritizing, and managing projects and project portfolio investments — from almost





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anywhere on almost any device. Project Online can be used by administrators, portfolio managers and viewers, project and resource managers, and team leads and members.

For more information about Microsoft Project Online, go to: <https://products.office.com/en-us/project/project-and-portfolio-management-software>

### Software and Services

- Office 365
  - Project Online
  - SharePoint Publishing Features
  - SharePoint Team Sites
- Microsoft Project 2016
- Microsoft Excel 2016
- Microsoft InfoPath 2013
- Microsoft SharePoint Designer 2013

### Partner

DeltaBahn LLC



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