

Solution Overview

"iTools meets a real need. There are a lot of white papers talking about this space, but this is the one product that really addresses the gritty problems of managing large programmes of projects"

Adrian Lobb

Business Performance Manager

Genesis Energy

Customer Profile

Genesis Energy is the leading energy company in New Zealand providing gas and electricity to more than 640,000 residential and commercial customers. Backed by a combination of hydro and thermal generation, Genesis Energy owns seven power stations in the North Island including New Zealand's largest coal and gas fuelled power station at Huntly, the Tongariro Power Development and Hau Nui wind farm.

Every day Genesis' contact centre answers over 5,700 customer telephone queries and responds to over 700 letters, faxes and emails.

The energy business in New Zealand is constantly changing. Customers expect fair prices, backed by reliable processes and quality service. Genesis is committed to meeting these expectations.

• Website

www.genesisenergy.co.nz

• Business Situation

In Genesis' retail division, new initiatives are aimed at cutting the costs of delivering the business and improving customer service.

- *Projects are characterised by complexity with many parties involved. An added complexity is project teams are often scattered throughout the country.*

• Pain points

Manual tools proving increasingly inadequate to manage and control projects.

- *No central place to communicate or access project information.*
- *Impossible to see what was happening within and across projects.*



Powering up Project Management at Genesis Energy

In today's competitive energy market, customers have a choice, and are demanding a higher level of service.

Competitive pressures put the heat on Genesis Energy to retain customers by improving customer service while minimising the costs of delivering the business.

In a volatile industry, the big question is how to take costs out and get the benefits of change without impacting customer service.

In Genesis Energy's retail division, change projects address these questions and are channelled through the Business Performance Team.

The pain of managing change

Initiating projects is difficult at Genesis Energy because of the complex array of parties involved.

Genesis has an outsourcing partnership with Customer Relationship Management specialists SITEL Corporation. SITEL manage Genesis' customer base from call centres and do everything from taking customer enquiries through to billing and managing debt. Projects can also involve Genesis' generation division, contractors and lines companies.

According to Business Performance Manager Adrian Lobb, "We struggled because of the multi-site, multiple aspect of projects. On any one project, we can have teams working out of Auckland, Hamilton and Huntley and across multiple companies and contractors."

"We needed a tool to bring people together to see what was happening within projects and across programmes of projects."

Project teams used manual tools including spreadsheets, Access databases, email and Microsoft Project to manage projects.

The constraints of manual tools were that "we could never access a project's status", Mr Lobb said. "Control was always in the domain of one person. There was no version control and project information was never up-to-date."

"Issues and risks were reported in a worksheet that was reviewed in weekly project team meetings. At meetings, we'd spend hours delving into the detail of every issue and risk, rather than filtering out what we should be focusing on. Projects lost all focus and direction."

"For a project manager managing a large project implementation, it was a nightmare, and the weekly meetings came to be known as 'road smashes'. Manual tools proved inadequate to manage an increasingly complex programme of projects", said Mr Lobb.

Cleaning up the 'road smashes'

"We looked at what was on the market, and found highly complex solutions", said Mr Lobb. "Struggling with our own complexity, the last thing we wanted was more complexity with a solution involving large software installations".

"We couldn't find a solution that was web-based, which is what we wanted, given we were working across

locations, companies and contractors.”

In February 2003, when the team found iTools Control, they decided to trial the solution.

iTools sheds light on the problem

The Business Performance team trialled iTools on an initial ten projects and liked what they found. iTools is today used for timesheeting, status reporting, and issues and risk management across the Retail division.

“One of early uses was timesheeting. Contractors filed timesheets online from where they worked and we, in turn, could check invoices against the workflow history on iTools”, said Mr Lobb.

Microsoft Project continues to be used for project planning. Key outputs from Project are entered into iTools for reporting and issues and risk management.

“We use iTools for management reporting. You shouldn’t burden management with big, unwieldy Gantt charts – too much detail only serves to confuse. iTools lets management see only the information they need to know.”

Individual project reports are consolidated into monthly management reports - giving a programme-level view of what is happening across projects.

iTools has an inbuilt hierarchy, allowing information to be ‘rolled up’ to provide a ‘birds eye’ view of a programme of projects.

A central place to communicate

“The ability to collaborate in real time with all parties via iTools hosted solution has made a huge difference to the way we operate”, said Mr Lobb.

“Everyone can access project documentation anytime and from anywhere. The problem of version control is eliminated and the project’s status is always current”, said Mr Lobb.

Accessibility of information led to greater visibility and accountability. “Project Managers can quickly see if their project information is out of date, and are aware their project sponsors can see this too. They can’t hide behind complex reports - their performance is there online for everyone to see.”

iTools is used across all retail projects now. iTools has been used on projects

to develop and launch new products on the market. It was used to merge the Freshstart customer base, as well introduce New Zealand Post’s eBill facility to customers in 2003.

Quick uptake critical to success

“It was critical iTools be quickly adopted by staff. There is no point having pockets of people using the application. It has to be adopted across the board – otherwise you don’t get the benefit of visibility and being able see what is happening across a programme of projects”, said Mr Lobb.

“What we liked about iTools was how intuitive and easy it is to use. You can get people up to speed on iTools within an hour.” There are now over 150 users on iTools.

A project management journey..

iTools takes people on a project management journey. “It measures an organisation’s project management maturity. It quickly showed us varying levels of competence in project management across the division”, said Mr Lobb.

“For some people, adopting iTools meant breaking bad habits and pushed them to work in ways they weren’t used to. It forced whole teams to get up to play with project management methodologies and disciplines”, said Mr Lobb.

Users weren’t the only ones on a journey. “Steering committees had gotten used to seeing Gantt charts and being micro-managers, which is not their role as sponsors. The ‘higher level’ reporting view means they now direct projects, rather than micro-manage.”

Mr Lobb rates the iTools team. “iTools are not like any other vendor I’ve ever worked with. They have been fantastically supportive - a software vendor out of the bag. They are responsive and understand your needs as a customer”, said Mr Lobb.

iTools Online helps companies navigate their way through a changing business environment to achieve project success. Their flagship product is iTools Control, a web-based tool that helps programmes and projects succeed by improving governance and increasing control and accountability for project managers. www.itools.co.nz

- *Constant battle to prioritise risks and issues.*
- *Weekly management meetings got caught up in the detail, with projects losing focus and direction.*

- *Management reporting sorely inadequate - steering committees struggled to direct and make decisions due to incomplete information.*

Solution Summary

- *A hosted web-based solution providing a central, consistent platform for teams to access project information.*
- *An inbuilt information hierarchy, allowing information to be ‘rolled up’ for consolidated views of risks and issues across a programme of projects.*

Value to Business

- *Injected direction and focus - steering committees and project managers see only the information relevant to them.*
- *Accurate and real-time risks and issues reporting gave back control to managers.*
- *Ability to access project information anytime and from anywhere enabled real collaboration within teams.*
- *Upskilling of the whole retail division on project management methodologies, disciplines and roles.*

Reaping the benefits

- **Visibility:** *Provides a visible project history, improving accountability. No risks or issues go unseen.*
- **Effective:** *Intuitive nature led to high adoption rates amongst users and greater visibility across programmes.*
- **Focus:** *Project managers and sponsors focus on outcomes, rather than the detail of projects.*
- **Efficiency:** *Management reporting and team meetings run more efficiently.*
- **Training:** *Training is fast and can be done over the phone. No need to travel to Hamilton for training, for example.*