

CIS: AN ENTERPRISE APPLICATION PROJECT APPROACH

By Calvin Pert

Saint John Energy recognized the positive impact on customer service that would result from modernizing and integrating its existing technology system. Prior to undertaking any changes to its technology, the utility turned to Fujitsu Consulting to develop a methodology that accurately predicted the potential benefits Saint John Energy could realize. The project focused on increased access to customer and billing information, streamlined financial services and shared access to information between operations and engineering teams.

CUSTOMER SERVICE

As with any industry, energy companies need to provide customers with the highest level of service possible while maintaining an integrated infrastructure capable of supporting it. With an objective to be proactive in the evolution of customer service and industry demands, the existing Customer Information System (developed in-house) within Saint John Energy was becoming a limiting factor. A new CIS capable of integrating information from all aspects of the business, from Engineering & Operations to Finance & Administration, was needed. In considering these dependencies, management sought to undertake a complete overhaul of its information system.

OVERVIEW

Saint John Energy is a non-generating municipal electric utility serving more than 35,000 residential and commercial customers within a 323 square kilometer area of Saint John, New Brunswick. With prevailing uncertainties in the energy industry, Saint John Energy recognized the need for a modern, flexible and integrated technology system. "We knew that we were going to undertake a substantial project, the first of its kind for Saint John Energy. Upon completion, improved access to integrated



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systems would allow staff to serve customers in the most efficient manner possible," said Tony Furness CMA, VP Finance and Administration of Saint John Energy. "The question in need of an answer was — we knew what we needed, but how would we get it?"

To accurately evaluate and guide the substantial changes needed to complete the project, Saint John Energy decided to leverage the knowledge and resources of a consulting company versed in business transformation. After careful evaluation, they selected Fujitsu Consulting.

Fujitsu Consulting based its approach on its Macroscopic® methodologies, a repository of best practices used to initiate, implement, and manage change in organizations. Additionally, Macroscopic provided a flexible set of integrated methods, techniques and tools uniquely suited for the task at hand. Within a few months of implementing Macroscopic, the combined team of Saint John Energy management and Fujitsu Consulting had established a Project Management Office (PMO) and steering committee, and completed a feasibility study.

The study identified a number of key criteria to follow while selecting the appropriate solution and technology vendors. Each criterion was assigned a priority and weight, and included the following areas of focus: cost; technology platform/integration; functionality; ease of use; vendor implementation; vendor support services and; vendor fit.

THE PROCESS

Using Fujitsu Consulting's "package selection and implementation methodology," the Project Manager and a Management Consultant developed and managed the Request For Proposal (RFP) phase based on the feasibility study, needs assessment and selection criteria. "Fujitsu Consulting was able to provide resources in a number of areas, primarily with project management; but when required and at the appropriate time was able to provide technical, analytical and functional resources," said Dave Horgan, supervisor of Information Systems, Saint John Energy. "Their breadth of knowledge enabled them to approach the pro-

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ject as a single unit, and did not require drawing upon additional external resources.”

The RFP responses were assessed using the Fujitsu Consulting Evaluation Framework Tool. Numerous vendors submitted bids for all or part of the RFP, and the tool was useful while reviewing the matrix of suitable solutions, based on the predetermined criteria and weighting. Resulting from the quantitative analyses, short-listed vendors underwent a further rigorous evaluation.

To complete the vendor evaluation, Saint John Energy asked Fujitsu Consulting to again analyze the criteria and provide a delivery framework and release strategy to guide further work. The vendor combination with the highest scores, the feasibility study, overall project costs, and schedule were presented to Saint John Energy’s Commission Board for approval.

The final recommendation for Saint John Energy was to undertake an Enterprise Application Project (EAP) consisting of a Geographic Information System (GIS), a Customer Information System (CIS), and Management Information System (MIS). This recommendation was approved and a time frame of 12-14 months was set for completion. The goals were to implement the systems on common hardware and database platforms using industry-accepted technologies and open system architecture so that multiple systems could work together.

Approaching a project of this magnitude posed many challenges. The anticipated change would not only impact the entire staff, but each of the company’s 35,000 customers.

Additionally, the software vendors each had differing methodologies and approaches to contracts, configuration, training, testing and implementation. Perhaps the most difficult challenge was managing the transition and balancing of the staff’s day-to-day workload, with the training and the testing to support the new systems. The ultimate success was dependent on the support and commitment of staff and vendors alike.

THE SOLUTION

“It was important to ensure

we would have a cost-effective, time efficient migration from our old to new systems,” said Tony Furness of Saint John Energy. “Fujitsu Consulting ensured this for us. Their guidance and depth of knowledge was invaluable”

The chosen suppliers provided Saint John Energy with the foundation and ‘birth’ of the integrated system it had set out to achieve. The CIS system designed by Advanced Utility Systems of Toronto provided state-of-the-art Customer Information and Utility Billing solutions exclusively for electric, water and natural gas utilities and government organizations. The MIS system, selected from Microsoft’s Great Plains product suite, offered cost- and time-effective ways to improve management of human resources, payroll, accounting, job costing, accounts receivable and accounts payable. Lastly, Saint John Energy selected the ArcFM GIS product suite to manage the location, attributes and network connectivity from the ESRI team in Halifax.

RESULTS

Beginning in August 2000, the project progressed on schedule and was completed within 12-18 months. Following a 10-month requirements, feasibility, package evaluation, selection, contract negotiation and hardware procurement phase, Saint John Energy had all 3 systems up and running within 8 to 10 months.

The CIS solution has been operational for 12 months, and users have been extremely pleased with the ease-of-use, and the ability to configure the system to handle their complex needs. According to Kathryn McKay, vice president of Client Service at Advanced Utility Systems, Saint John handled the change project in a very efficient manner. By

way of compliment, she stated, “With the vast amount of change they faced, and the complexities of implementing three new systems, Saint John elected to bring the CIS system live, and to then enhance functionality as the market demanded.”

Ultimately the upgraded systems have fit well into the organization. The new systems have enabled Saint John Energy employees to gather and utilize increased amounts of information. Customer service has been noticeably enhanced due to the increased access to customer and billing information. Financial services have been streamlined and operations and engineering teams can share information more easily. With these changes, Saint John Energy is confident that it can continue to be proactive in meeting the evolving needs of its customers and the ever-changing energy industry.

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