

RECENT  
PROJECTS

▶ Stonebridge has been engaged by a natural gas producer to provide architecture and design services for its data warehousing environment. The existing environment, which is built using Informatica and Oracle, supports several business user groups within the organization by providing access to data from multiple sources. Stonebridge is expanding and modifying the Authorization for Expenditure (AFE) subject area to accommodate changes in the underlying source systems. Prior to this engagement, Stonebridge had assisted the company in several business intelligence projects, including developing KPI-based dashboards, creating reports and data cubes, and simplifying information access to business users.

▶ Stonebridge has been selected by an oil and gas drilling services-company to assess the content management capabilities of its legal department. During this Phase Zero® Assessment, Stonebridge will analyze the legal group's document and records management environment, including technologies, processes, culture, and financials. Based on this analysis, Stonebridge will deliver a detailed report summarizing the high-level business requirements, a proposed ECM solution, a technical road map, and a specific project plan for delivering the solution.

▶ Stonebridge was selected by a large natural gas exploration and production company to assist in the conversion of 2.5 terabytes of data to an Open Text Livelink-based content management system. The data, the entirety of which is used by the company's geology department, is currently stored in multiple shared drives. Stonebridge is providing C# and .NET design and custom development expertise in order to accelerate the conversion of shared-file data and provide onsite support of the Livelink application during the process.

## PROBLEM DOMAIN ANALYSIS:

*Increasing Your Odds for Project Success**By Marty Peralta*

CIO Magazine's Web site recently cited a survey of 800 IT managers. Among the findings:

- 62 percent of organizations experienced IT projects that failed to meet their schedules
- 49 percent suffered budget overruns
- 47 percent had higher-than-expected maintenance costs, and
- 41 percent failed to deliver the expected business value and ROI

Keep in mind that these are the opinions of IT managers. One can assume that the business sponsors take an even dimmer view of the value of development projects.

Interestingly these dismal odds for project success are roughly the same as they were 10 years ago. The obvious question is why? In my 20 years in the IT industry, I can say that failure can occur in all phases of the development process, from scope definition to solution design and build-out to implementation and knowledge transfer.

To be sure, a rigorous adherence to project management office (PMO) standards is to your advantage during a development project. However, PMO tools and process in and of themselves cannot ensure the ultimate effectiveness of the project. The reason is because a project solution architecture is only as good as the business analysis and critical thinking that precedes development. In short, the pre-development analysis and requirements gathering is the real difference maker between project success and project failure.

Formalizing the pre-development analysis phase is a best practice that we at Stonebridge provide to clients via our Phase Zero® Assessments. A key component of our consulting methodology, Phase Zero is so named for its chronological place in multi-phased project development. The goal of a Phase Zero Assessment is to help both Stonebridge and the client gain a clear, shared understanding of the scope and extent of the business problem and the level of effort and costs necessary to deliver the solution.

The typical Phase Zero Assessment is short in duration, usually four to eight weeks. During Phase Zero, we analyze various factors that could impact the project, including technologies, processes, culture, and financials. The key deliverables are a detailed report summarizing the high-level business requirements, a technical road map and project plan for delivering the proposed solution (i.e., Phase 1+), and frequently a working prototype or proof of concept (POC).

Far be it from me to imply that pre-development analysis precludes project failure. But I can say that project failure is a near certainty without a Phase Zero-type component. Given the current odds for success, IT managers and business sponsors alike should not take this critical step lightly.

**ABOUT THE AUTHOR:** Marty Peralta is a principal consultant at Stonebridge and also directs the company's Project Management Office.

Stonebridge has completed a **Phase Zero assessment** of the reporting and analysis needs of one of America's largest newspaper groups. The assessment scope focused on a deep analysis of the data management and reporting environment of the media company's circulation area at the individual property and corporate levels. During the engagement Stonebridge helped the company precisely define the initiative's scope and high-level objectives, define data and report standards, create an analysis and reporting prototype system, perform a gap analysis, create the conceptual solution architecture, recommend hardware and software, and deliver a comprehensive implementation plan and cost estimate.



## FROM JAMES IVY

I recently read an article about a new CEO's "embarrassing problem." It seems this CEO discovered there was no easy way for him to get a picture of what was happening in his company, no way for him to get the information he needs to accurately gauge the company's true performance.

I'd be willing to bet that this guy's embarrassment was at least partially due to the irony that his company was itself in the IT services business. But I submit that his situation persists at some level in all enterprises and across all industries.

I can make this assertion with confidence because, as the chief executive of a company that develops performance management solutions, I face the same basic problem that my customers do. And that is, getting to "a single version of the truth," which is absolutely essential to making informed decisions.

And therein lies the crux of the problem. Getting to a single version of the truth is not a task you can simply check off your list as "done." The science of performance management is evolutionary. And while performance management tools have been declining in price, that doesn't mean getting to a single version of the truth is any easier. The critical success factor in performance management is persistence and adaptability in the face of constant change – and that is the case for both the executive and the technical solution.

## News You Can Use

The typical causes of an unsuccessful data warehousing project are:

- Failure to use a proper data warehousing project methodology
- Ineffective project team structure
- Failure to involve and actively engage the business users
- Failure to deploy application releases (i.e., Big Bang vs. iterative development)
- Underestimating data cleansing efforts
- Lack of executive support and sponsorship
- Inadequate testing
- Failing to plan for ongoing support and development of the data warehouse

Given the analytical and reporting benefits of a well-conceived data warehouse, it is imperative to get it right the first time. According to Steve Molsberry, director of Stonebridge's Business Intelligence practice (steve.molsberry@sbt.com), you can maximize the success of your data warehousing initiative using the following best practices:

- Identify and engage a strong project sponsor.
- Build out the data warehouse environment incrementally, within an overall architectural framework.
- Get access to source data early in the project.
- Establish relationships and commitment from source system owners.
- Begin prototyping in order to demonstrate analytical capabilities early and repeatedly.
- Understand the information needs of different user types.
- Don't underestimate the extraction, transformation, and load (ETL) effort.
- Don't underestimate the care and feeding of the data warehouse after implementation.

**CUSTOMER QUOTE**

*"Stonebridge helped us through a time where talent was short and demand was high. Where other firms provided an individual, with Stonebridge, even if only one person was provided, we could feel the team behind the individual. In many cases we were able to capitalize on the team behind the Stonebridge consultant."*

– Stonebridge DBA Services customer

## R E C E N T P R O J E C T S

▶ Stonebridge recently completed a custom development project for a security services company to develop and implement a workflow-centric Web application to serve as the system of record for client transactions. The new application, which replaced an existing Lotus Notes-based tool, automates and improves workflow, consolidates source data into a single centralized depository, and provides administrators with the flexibility to manage the application with minimal technical support. The user interface is written in ASP.NET. The workflow automation is built on K2 blackpearl server, and the middle tier is a Web-service application written in C#.

▶ Stonebridge is engaged by a large integrated energy company to create a KPI-based performance dashboard. The dashboard, designed and implemented by Stonebridge using Microsoft's PerformancePoint business intelligence suite, enables the company to track the transportation and distribution of its oil and gas products. The first phase of the project focuses on demurrage, i.e., when chartered tankers are prevented from the loading or discharging of oil within a stipulated time frame – a situation that has a substantial impact on the company's profitability.

▶ Stonebridge recently completed Phase 3 of a data warehousing development project for an insurance company. The project, whose scope comprises five development phases, is primarily focused on providing advanced reporting and analytical capabilities to enhance the company's new Fiserv policy, claims and billing software. In Phase 3, Stonebridge completed a business requirements assessment, delivered the architectural design of the data warehouse, provided ETL development to populate and update new structures in the reporting database, and developed multiple reports and cubes to address the defined business requirements for improved reporting and analysis capabilities.

# Extranet Portal Gives Working Interest Partners Secure Access to Well Information

## THE UPSHOT

- A portal provides a standard, easy-to-use mechanism for your partners to view structured and unstructured data.
- A partner portal enables you to publish business information on a secure extranet site.
- An extranet portal can provide a detailed audit trail showing when documents are added to the system as well as tracking when partners have viewed them.



### The Client

This Houston-based energy company primarily focuses on the exploration for and production of natural gas. As an operator, the company derives the vast majority of its operating income and cash flow from its E&P business.

### The Problem

Communicating with working interest owners is a common administrative burden for E&P companies. Typically an operating agreement requires the operator to communicate basic information – e.g., drilling reports, completion reports, gas analysis reports, etc. – to non-operating partners for each well in which they have a financial interest. Gathering this information is extremely time-consuming and labor-intensive.

- The process involves numerous manual steps in order to create, scrub, package, and distribute information via e-mail or regular mail to each partner.
- Each well has multiple working interest partners. For a large operator with hundreds or thousands of wells, the time

and labor required to gather partner information together is multiplied.

- The core data resides in non-integrated source systems, is often difficult to extract, and may be redundant and inconsistent from one source to another.
- The operator bears the risk of the information getting to unauthorized people.
- There is no audit system by which the operator can track if, when, and who has received the information.

For Stonebridge's client in particular, the partner communication challenge had grown due to increased drilling projects for which it functioned as managing partner. The company wanted to automate its internal processes for gathering partner information and have the ability to "publish" the information so that working interest partners could access their well information via an extranet partner portal.

### The Solution

Based on a successful proof of concept prototype of a partner extranet portal, Stonebridge conducted a Phase Zero® assessment with the purpose of comprehensively mapping the client's current partner communication processes, taking into account such factors as timing, data sources, method of document compilation, quality control points, storage location, personnel accountability, and method of distribution. Based on the assessment findings, Stonebridge consultants developed a custom extranet portal solution for distributing information to the client's working interest partners. Stonebridge designed the partner portal based on four principles:

- Clarity – limit the portal itself as well as each associated well site to essential information only.

- Simplicity – provide an application that is understandable across the various roles within partner companies (e.g., engineer, clerk, landsman) who may need access to information.
- Security – restrict access to approved wells and authorized partner companies; manage access at the individual user level.
- Flexibility – build in a capacity to add new types of documents and business intelligence related to the wells as the number of partners grows.

### The Benefits

The SharePoint-powered ECM and portal solution provides the client with the following key benefits:

- The designation of operating company determines the set of wells that are available in the partner portal to each user.
- The wells and their associated sites are related to the operating company based on verification from land/division order data.
- Authentication of individual users through their e-mail address and a managed password ensures that only allowable access is granted.

After logging in to the portal, a partner can view a list of its well interests and follow a simple navigation structure to individual sites for partner-associated wells. Each well site includes a breakdown of key well master data, derived from the operator's line of business systems.

In addition, a partner can browse the information published for its wells or search for information based on a number of criteria, including keyword or document type. Partners also have the ability to zip and download documents for use in their own local environment.

# RECENT PROJECTS

► Stonebridge has been selected by a drilling management services company to provide additional reporting and analysis capabilities to its Cognos-based performance management environment. This project is an extension to an earlier engagement for developing an enterprise business intelligence solution in order to standardize rig performance reporting. Stonebridge designed an extensible reporting foundation to accommodate growth and anticipate additional reporting and analysis needs. Based on this foundation, Stonebridge is enhancing existing rig performance reports, creating new reports, and fine-tuning the system's underlying data warehousing environment.

► Stonebridge has completed a BSM engagement for an E&P company seeking to improve the performance, service, and productivity of its IT environment. The company selected BMC's IT Business Management (ITBM) software, specifically the Project Portfolio Manager (PPM), Human Capital Management (HCM), and Vendor Relationship Management (VRM) modules. Stonebridge implemented the ITBM software – including developing the design specification, data and system architectures, installing the tool, and rolling out the solution – and provided functional training to end users.

► Stonebridge has been selected by an oil and gas drilling company to provide senior-level business intelligence consulting services and data warehousing support. The company's business intelligence environment utilizes software components from Cognos and Microsoft. In addition to enhancing the company's overall reporting and analysis capabilities, Stonebridge will provide a wide range of consulting services and onsite support, including performing ETL-related activities, upgrading the SSIS packages to SSIS 2008, changing the security model of all SSIS packages, and updating the SQL Server database.

## Our Commitment to Customer Satisfaction

Each customer engagement allows Stonebridge the opportunity to prove our business value as well as learn how we can improve upon our technical skills, business knowledge, and delivery methodology. The Stonebridge Customer Satisfaction Survey is an essential part of our commitment to total client satisfaction and continuous improvement. The completed surveys are sent directly to James Ivy, Stonebridge's CEO, for review and, if necessary, follow-up action. At the end of every engagement, we request that each customer provide direct and candid feedback on our overall project performance via a Web-based survey tool. We frequently ask our customers to participate in "in flight" surveys at defined project milestones during the engagement.

### Customer Quotes

"The project was well managed. There were no surprises as to the final cost of the project. The Stonebridge team managed their resources well and came in on budget."

"Stonebridge's Statement of Work was an excellent tool to help define and agree on expectations before the project started."

"Stonebridge's status reports were a very efficient way to stay up to date on project activities. The project team members had strong communication skills."

"The Stonebridge consultants shared valuable lessons learned in other projects. Knowing they were familiar in the areas related to the assessment increased our confidence on your services from the start."

"The Stonebridge team successfully juggled multiple development tracks involving three different user groups and various delivery schedules, and met every deadline, on time and as promised. The users have nothing but praise for the new reporting and analytical capabilities."

## STONEBRIDGE PARTNER PROFILE



Stonebridge is proud to highlight our partnership with IDV Solutions, a provider of visual composite applications. IDV's software helps organizations make information more accessible, understandable, and contextual through the use of data visualization tools such as Microsoft Virtual Earth. Stonebridge is integrating IDV's Visual Fusion Server with Well360°, our asset-centric reference architecture for oil and gas data management.

Stonebridge and IDV share a common technical bond to Microsoft. Both companies are Microsoft Gold Certified Partners. IDV leverages Microsoft development technologies such as SQL Server 2008, SharePoint, and BizTalk Server.

## About Stonebridge

Stonebridge is an information technology consulting firm focused on helping organizations harness the power of people, processes and technology. Our clients look to us as a strategic partner with a shared commitment to achieving their business objectives and maximizing their business performance. Founded in 1995 on a commitment to establishing high-value strategic alliances with our clients, Stonebridge has provided business solutions to organizations in all major industries, representing private, public, government, and non-profit entities.

More info at [www.sbti.com](http://www.sbti.com).