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Case Example: Strategic Planning Tool

A client planned a number of development projects over the lifecycle of a production plant. data2impact were asked to develop a consistent framework for capturing and storing project data, as well as a tool to assess the economic impact of impending projects and proposed investment strategies.

We developed a cascading three-part solution in Excel, consisting of

1. a data collection template
2. a project database and
3. a scenario manager.

The **data collection template** enables the client to collect the project data from teams across the organisation while ensuring a consistent format. It provides collapsible menus beneath which data tables are located: Selection of a data item – such as "Assumptions and Risks" – reveals the underlying data table. Help is available for each data item, along with project development guidelines.

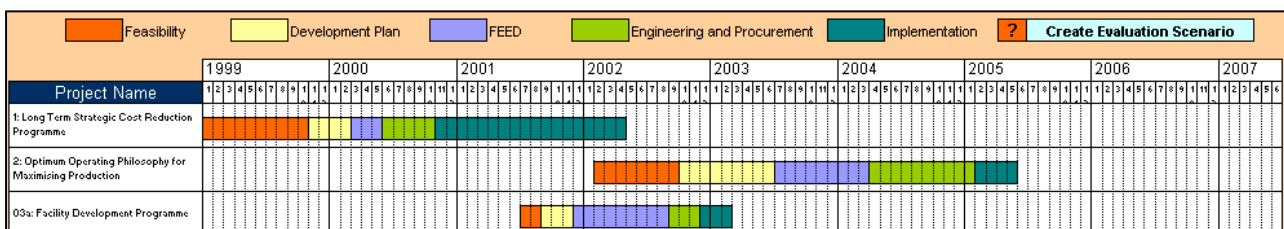
The screenshot shows a software interface for data collection. At the top, there's a header for 'Business Unit XXXX, Project Portfolio' with fields for Project # (03b), Version (1), and Date (13-Nov-01). Below this are buttons for 'View Full DataSheet', 'Completion Guidelines', and 'View PPS Flowchart'. A sidebar on the left lists various data items like 'Project Type', 'General', 'Description/Scope', etc. The main area is divided into sections: 'General' with fields for Sponsor (S.W), Coordinator (MDE), Priority Ranking (5 - Economic), and Project Phase (Feasibility); and 'Milestones*' with a table of key milestones and completion dates.

Key Milestone	Completion date
Update unit forecast model	
Cost potential development & conduct economic screening	
Engineering study : perceived power availability to support new development	

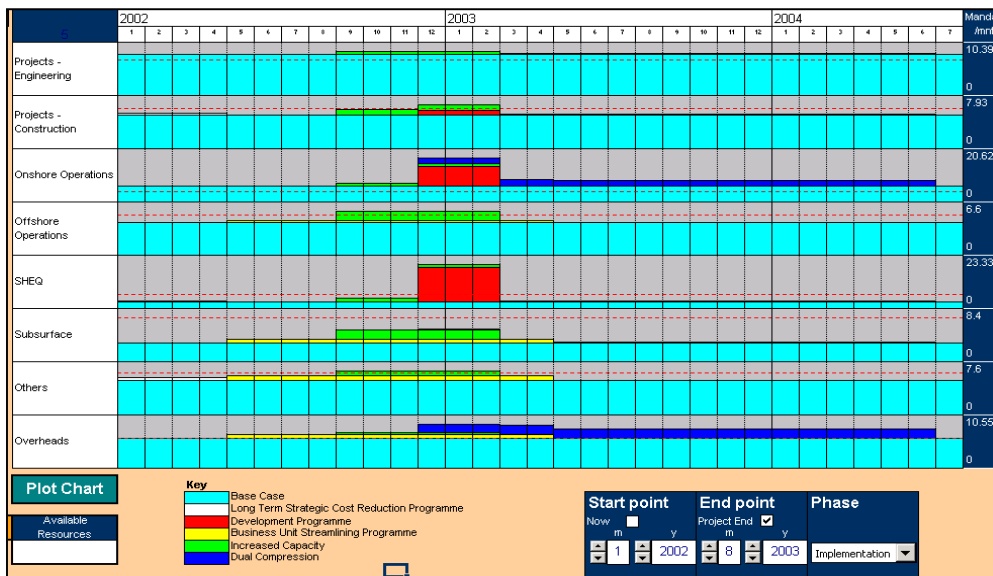
Data from each project are automatically read into the **project database** where a complete record of all proposed development project activities is stored.

These data are then exported into the **scenario manager**, which comprises a set of analysis tools to create and manage scenarios, evaluate their feasibility, and establish their economic impact.

For instance, a project plan module creates GANNT charts to schedule projects within a scenario (see figure below);

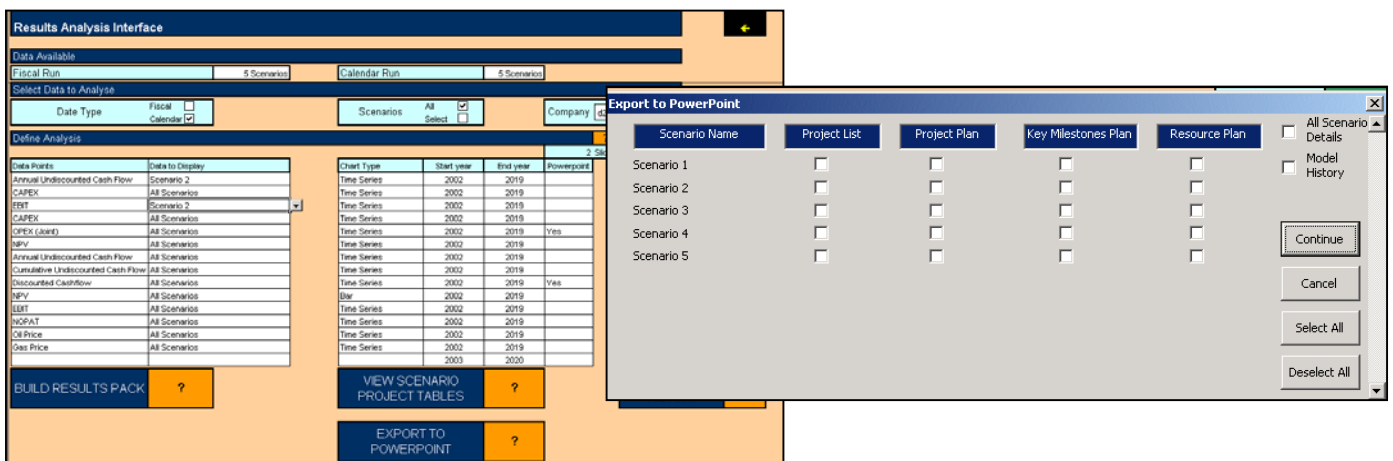


A resource planning module presents a monthly resource plan broken down by team and project, in order to establish whether the resources required for a project exceed the limits set for the respective team.



Other tools performing feasibility tests include a comparison of proposed Opex and Capex spends against budgets.

Once the initial feasibility checks are completed, scenarios are run through an economic forecasting model and key economic indicators are exported back into the scenario manager for full evaluation. A scenario results analysis module enables the user to plot these indicators across different time periods for selected scenarios.



All feasibility analysis and economic evaluation can be automatically exported into a PowerPoint report for dissemination to a wider decision making audience.

This planning tool enabled the client to develop long-term strategic plans incorporating the most profitable and feasible of the development projects proposed, which maximised returns during the lifecycle of the plant.