

Capital Projects Portfolio Planning Case Study

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Capital Projects Portfolio Planning

End-to-end visibility, intelligent decision-making, and synchronized execution to optimize ROI

Challenges

- No consolidated view of investment portfolio, priorities and forecast
- Lack of consistency (KPIs, data, process) & accountability
- Manual data aggregation due to lack of system/process integration
- Low visibility on risks & opportunities (cost, resources, schedule, etc.)

Goals

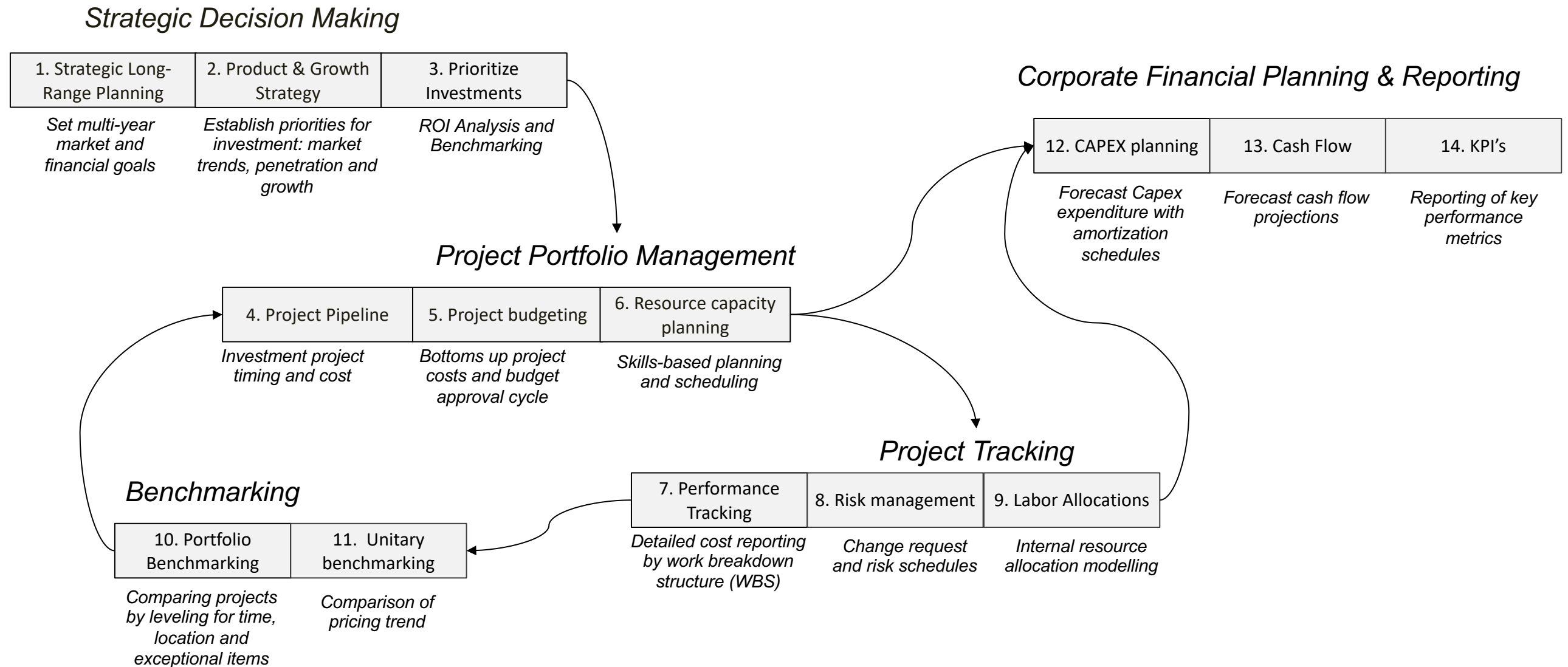
- Drive **consistency** & standardization for apples-to-apples comparisons
- Create **alignment** with streamlined data & processes
- Improve **efficiency** with automation & end-to-end data integration
- Create **transparency** on cost drivers, resource needs & KPIs, performance to budget and return on investment (ROI)

Solution

Create integrated Driver-based Capital projects portfolio planning to prioritize, manage and measure project investments

- Key stakeholder visibility and collaboration to track project progress and costs in a single place
- Integration with other systems for automated data alignment
- Project budgeting and scenario models to evaluate projects & prioritize spend
- Project cost reporting (Budget vs. Forecast including detailed change logs (pending, agreed, rejected), risk management, contingency management, and cashflow forecasting)
- Integration with ERP solution for project accounting
- Automated project performance and associated KPIs

Capital Projects Portfolio Process Map



Capital Projects Case Study

Client Profile	Business Challenge	How FP&A Strategy helped	Results and Benefits
<p>Our client is a North American global digital infrastructure company with over \$16bn in capital expenditure</p>	<ul style="list-style-type: none"> Our client lacked a centralized environment to synchronize and utilize data across all phases of project delivery 	<ul style="list-style-type: none"> Implemented a technology solution across 17 business teams to streamline pipeline planning, project cost reporting, capital equipment purchase tracking, budgeting and benchmarking 	<ul style="list-style-type: none"> Achieved \$5.5M+ in savings by moving from task-based data entry to proactive analytics and exception management
	<ul style="list-style-type: none"> Our client was using Excel extensively for all project cost tracking and global reporting 	<ul style="list-style-type: none"> We built a cloud-based cost-tracking solution to help manage project cost management to an approved budget, including contingency management, change logs, GC allocations, and risk & opportunity schedules 	<ul style="list-style-type: none"> Standardized process and reporting formats resulting in eliminating 2,700+ disparate Excel spreadsheets Created exception tracking and automated reporting to ensure issues are identified early and corrective action could be taken
	<ul style="list-style-type: none"> Our client was unable to leverage the data from prior contract costs to predict future expected costs 	<ul style="list-style-type: none"> We built a project benchmarking solution which is integrated with cost reporting to ensure new budgets are comparable to the latest costs of actual projects 	<ul style="list-style-type: none"> Improved budget accuracy by 2% across the portfolio from 88% budget compliant to 90% compliant, resulting in more predictable project ROI

A person wearing a white hoodie is seen from behind, with their arms raised in a celebratory gesture. The background is a sunset over a body of water, with the sun low on the horizon, creating a warm orange and yellow glow. The sky is filled with soft, colorful clouds. A semi-transparent grey box is overlaid on the left side of the image, containing the text "Thank You".

Thank You