

# CASE STUDY: Strategic Planning & Digital Transformation

This client of Xtensible is a utility in Canada with a customer base of approximately 500,000 providing electricity through:

- Generation
- Transmission
- Distribution

Partnering with Xtensible for consulting services:

- Business & Technology Consulting
- Strategy & Architecture
- System Integration
- Enterprise Information Management
- Business Intelligence & Data

## THE NEED

The Utility is wanting to articulate its strategic intent and determining the impact more clearly on its business model.

## BUSINESS VALUE

- Energy Supply Optimization
- Digital Asset Management
- Advanced Metering
- Customer Engagement/Retail
- Billing and Revenue Management

## RESULTS

An enterprise-wide Grid Modernization Digital Transformation Roadmap addresses the needs of people, processes, and technology. Documented and understood plan that articulates the dependency between projects and programs.

## OPPORTUNITY

Based on extensive research, addressing local, national, and global drivers for change, the Utility identified key drivers impacting their business model such as declining load growth, small scale generation, impact of the 4th industrial revolution, changing customer interest, as well as changing social and political interests, for instance climate change, as input to close the strategy gap between operational focus on the business and the vision for their Utility of the future. Realizing limited corporate experience with change management, strategy planning, data collection and its dissemination a partnership with Xtensible was initiated to define and create a singular, integrated roadmap to support Digital Transformation.

## THE APPROACH

The Utility chose to approach their vision by focusing initially on the implementation of the Utility information model to help create "One Understanding" of their information. They decided to base their approach on the Common Information Model (CIM) in conjunction with Xtensible Semantic Modeling Maturity Model to facilitate Enterprise Information Management (EIM). With this methodology scripts were developed for a series of workshops, including alignment workshops to finalize set of goals, success criteria, team members, and deliverables for the initial value plan, followed by dependency analysis, gap analysis, and roadmap workshops, resulting in an adjusted integrated the Utility Roadmap Plan which was presented to stakeholders.

The coordinated efforts between their decision-makers and executors were almost nonexistent and after a careful assessment of their planned approach, we discovered that enterprise information objects would likely be introduced into the enterprise with disjointed topology. Had our client moved forward with the existing roadmap, the risk of technical debt and reduced value in not only our services, but also their internal efforts, could have been severe.

To facilitate an orderly introduction of enterprise information objects and analytics, we proposed the Xtensible Planning Methodology (XPM). When utilities have tens or hundreds of objectives, prioritizing across business units is essential. XPM creates a way to do this effectively with:

- **Integration of disparate plans.** If people aren't integrated, silos are reinforced, and likely data won't be easily integrated
- **Identification of which enterprise analytics and information objects** need to be brought online and in which order, based on the plan
- **Identification of aligned, integrated and properly sequenced initiatives** designed to achieve the organization's goals in the order they intend to achieve them

# EXTENDING FOR THE ENTERPRISE

The successful outcome of the initial value plan alignment, led to engaging on a larger initiative for the enterprise overall. This involved identifying for each business area substantive gaps between the current and future state, expanding on these gaps, sharing with other business leads for wider awareness and input, deciding on choices to close the gaps after having analyzed and prioritized many. Through workshops the teams were brought together to report out with respect to their choices for input spanning over multiple areas including:

- Transmission and Distribution asset management
- Outage Management
- Power quality optimization
- Advanced distribution management
- Meter Data analytics
- Credit and collections
- Demand response programs
- Distributed Generation projects

## RESULTS

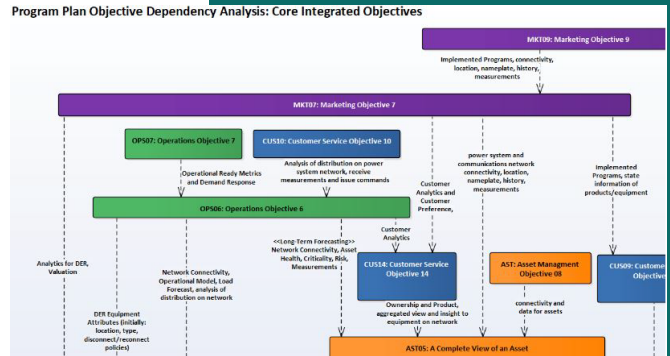
With the help of Xtensible and CIM, the Utility can pursue a EIM and a digital business strategy. They can unlock data currently in silos and integrate it. There is also a better understanding of what the data means. Key is also the ability to include all stakeholders and then communicate the enterprise plan for transformation across all departments. Ultimately, they will be able to save more money, and make more money while keeping a focus on their customers desires for clean, resilient energy, minimal impact on the environment, better information and more control over their cost, while maintaining a better service. The Utility is closing the strategy map and keeping it that way. *“The Utility recognized that if they had moved forward with their existing roadmap, the risk of technical debt and reduced value could have been severe”* says Tim Duval, Xtensible Principal Consultant. He was leading many of the large workshops at the Utility which included instances of more than 30 Utility strategy and business leaders from across all business functions.

## OPTIMIZING SPEND

The Utility is looking to continue to optimize Capital and Operational spend and reliability, as well as better understand risk to related to its portfolio of assets and dependencies.

Xtensible continues to provide professional services to the client for:

- Business and Technology Consulting
- Enterprise Information Management
- Data Architecture & Data Modeling



“ ONE UNDERSTANDING OF THE DATA ”



### BUSINESS UNITS INVOLVEMENT

- Information Technology
- Asset Management
- Grid Operations
- Customer and Meter
- Digital Innovation
- Smart Grid Program



### UTILIZED FRAMEWORKS

- Xtensible Enterprise Information Management (EIM)
- Xtensible Planning Methodology
- IEC CIM

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