

Transaction Improvement Project

Client & Project Background

This client is a Fortune 500 energy transaction company whose Commercial & Trading organization is in the midst of a significant program to optimize the alignment of process activities across the organization in support of business strategy, operational goals and legal and regulatory requirements—essentially change the way it does business. Due to Percipio's deep knowledge of the client's business—gained through a series of engagements over the past five years—the client engaged us to manage this approx. \$30 M program known as the Transaction Improvement Project as well as to deliver on the 11 key initiatives involved in the program that will continue through 2009. Now in Phase 2 of the program, we are currently delivering on the Energy Trading System initiative.

Challenge

The complexity and magnitude of the Transaction Improvement Project and its initiatives are certainly challenge enough, but in order to deliver more than just project management, Percipio has delved deep into the business to identify and address project challenges at the foundation—challenges such as:

- The existing systems environment is extremely fragmented
- There are multitudes of stakeholders across many business units
- The current processes focus on the 'how' while the 'why' is often lost

These challenges exist whether in relation to overall program management or delivery on an initiative.

Solution

We have consistently brought together the myriad of stakeholders and driven the process to ensure critical decisions are made within the Client. Some of the most critical decisions have been around untangling the existing fractured systems infrastructure to determine which pieces to keep and which to retire. Throughout creative and enduring facilitation that has garnered real results, Percipio has provided a balancing effect along with information on industry best practices as well as experiences from past projects.

Percipio provides strategy advice that ensures business value is achieved, monitoring progress toward goals, and smoothing the progress of synergies between processes and technologies.

Results

Phase 1 of the Transaction Improvement Project completed successfully within the prescribed nine-month timeline. As many of the initiatives in Phase 2 have been completed, the program is poised to help the client realize the targeted rate of return — in essence changing the way it runs its business from an operational perspective.

Percipio has done a fabulous job for us, assisting us in everything from Sarbanes-Oxley compliance to process reengineering and new systems planning work. I'd highly recommend their team to help you with your business issues."

-Managing Director,
Energy Finance

Service Line / Service Offerings	Core Competencies	Key Deliverables
IT Integration <ul style="list-style-type: none"> ▶ Business Requirement Analysis ▶ Software Selection ▶ Software Implementation 	<ul style="list-style-type: none"> ▶ Project Management ▶ Process Design ▶ Change Management ▶ Facilitation 	<ul style="list-style-type: none"> ▶ Requirement Definitions ▶ Qualitative and Quantitative Evaluation Criteria Development ▶ Process Maps and Documentation
Operations Improvement <ul style="list-style-type: none"> ▶ Process Design 		