Archibus Case Study:
San Diego Gas & Electric

Reimagine Your Workplace™

With a goal of moving from an inefficient legacy system for its annual capital project management process to a multi-year approach that normalizes activities and budgets, San Diego Gas & Electric (SDG&E) transitioned from a collection of project management, work order, and financial software with limited data-sharing capabilities to a centralized, highly integrated IT platform featuring Archibus at its center.

The capital project challenge for an organization as large as SDG&E, with its diverse facility types, is considerable given its more than 2 million square feet of office buildings, operating bases, substations, and payment centers. Upgrading the existing system to manage that function required a plan equally large to connect its multiple platforms and make them work as one.

Facilities Facts

41,000
Sq. Mile Service Territory

2M
Square Feet of Facilities

Reasons for Implementing

- Inefficient system created need for a replacement that could integrate capital project management processes with real estate/facilities management tasks/data
- Maximo maintenance information
- SAP/financials

Archibus Solutions

- Capital Project Management
- Space Management
- Move Management
- Lease Administration
- Energy Management
- Asset Management
- Portfolio Planning & Forecasting
- Emergency Preparedness

Benefits Gained

- In 5 years, annual budget for capital projects was increased from $5-7M to over $40M
- Improved data, processes, and reporting for capital project management
- Enhanced cost/accounting control
- Normalized long-range project planning and budgeting

Indispensable Planning

"Dwight Eisenhower once said that 'In preparing for battle, I have always found that plans are useless but planning is indispensible,'" says SDG&E Real Estate Resources Manager Dave Carew. "I think there is something to that statement; by the time a plan gets to a piece of paper it seems like you're on to the next thing or process.

"We had a project management spreadsheet that had 220 columns for each row; each row represented a project, and we had over a thousand rows (project requests) each year. And the formulas — you needed to be a rocket scientist to figure out what cells were calculating off which formulas at any given time. We had implemented Archibus in the other areas of facilities and real estate management — lease administration, MAC and space planning — so we thought that we needed to revitalize our project management system and tie it all back into Archibus as the central point of information exchange."

With the legacy project management system in place, along with Microsoft Project, Archibus applications, Maximo for processing work orders, and SAP handling the company's financials, SDG&E created a 9-month, three-phase implementation plan to improve its capital project process.

That plan would phase out the legacy system, which couldn't easily perform automated, bi-directional data interchanges with other systems. Microsoft Project was eliminated and its basic functionality duplicated and enhanced through the customization of the Archibus Project Management application. It would also integrate space and preventive maintenance data and processes. Ultimately, the SDG&E team would link all that information with SAP financials to track actual costs per project.

Enhance Capabilities; Organizational Transformation

In order to create the new project management platform, the SDG&E plan included gap

analysis, process reengineering, data mapping/ normalization, establishment of background data/ standards, definition of workflow rules, design of feature enhancements, and concluding with training and system roll out.

The functionality goals were equally specific and covered the management of project requests, workflow approvals, cash flow and budget tracking, schedules/milestones, project close-out and last, but not least, document management.

"We used Archibus Business Partner FMP, Inc., to help us come up with the most integrated and economical solution," remembers Carew. "So we used all the parameters we had identified to design the new system, which also added Archibus Capital Budgeting and Project Management applications. And as we continued, the ability to report on accurate project details gave management greater confidence in the group's ability to manage more money. So over the last 5 years the budget increased from $5-7 million a year to over $40 million annually."

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—San Diego Gas & Electric, Dave Carew, Real Estate Resources Manager

SpaceIQ

Just as important, a more transparent, integrated project management system meant that projects could be kept on track more easily to avoid the hockey-stick effect at the end of the year when budgets have to be spent (or forfeited) in the final months of the year. The new system, in contrast, aided the organization in pursuing multi-year project cycles to keep those projects moving forward.

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Santa Clara, California United States
www.spaceiq.com

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