

SharePoint Customer Solution Case Study



Natural Resources Company Streamlines Business-Critical Project Funding Process

Company: The Doe Run Company

Website:

<http://www.doerun.com>

Country or Region: United States

Size: 1,500 employees

Industry: Natural Resources

Partner: Innovative-e and Nintex

Partner Websites:

<http://www.innovative-e.com>

<http://www.nintex.com>

Company Profile

Based in St. Louis, The Doe Run Company is a privately held natural resources company and one of the largest integrated lead producers in the Western Hemisphere. Dedicated to environmentally responsible mineral and metal production, Doe Run operates one of the world's largest, single-site lead recycling facilities, located in Boss, Mo. The Doe Run Company and its subsidiary deliver products and services necessary to provide power, protection and convenience. Doe Run has operations in Missouri, Washington and Arizona.

Software and Services

Microsoft® SharePoint® 2010

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“Innovative-e helped The Doe Run Company create a Business-Critical SharePoint solution by helping the customer implement the AFE business process and forms in SharePoint.”

Denise Callahan, Doe Run PMO Manager

The Doe Run Company needed help automating many of the Project Management Organization (PMO) functions that were being performed manually and with spreadsheets. These functions included the project initiation and funding approval process, portfolio reporting and management, and capturing data at project closing. Innovative-e assessed the situation and helped the customer implement a Business-Critical SharePoint (BCSP) solution that will result in greater productivity and improved financial rate of return for the customer.

Business Needs

The Doe Run Company is a privately held natural resources company in St. Louis and is one of the largest integrated lead producers in the Western Hemisphere. Dedicated to environmentally responsible mineral and metal production, Doe Run operates one of the world's largest, single-site lead recycling facilities, located in Boss, Mo. The Doe Run Company and its subsidiary deliver products and services necessary to provide power, protection and convenience.

Project funding decisions at The Doe Run Company were based on a complex “Authorization for Expenditure” (AFE) process developed in a spreadsheet. The spreadsheet was used to document the business case for the project which included complex economic calculations (Net Present Value, Payback Period and Internal Rate of Return).

Manual Processes with Sticky Notes

The Doe Run Company was already using SharePoint 2010 for project team collaboration but wanted to streamline the



AFE process using SharePoint and wanted to ensure that all team members were aware of the most recent status of the AFE. When Innovative-e, a Microsoft partner, made its assessment of The Doe Run Company's needs with regard to their AFE process, it was determined that the manual processing of the AFE spreadsheet was cumbersome and inefficient. The customer's pre-solution AFE process required that data be entered on an AFE spreadsheet. Multiple copies of the spreadsheet were stored in several locations, so it was difficult to know which version was the latest version. Also when information on the AFE was updated, the original requester often didn't know about the change. The AFE was printed and manually passed around from one desk to another for approvals. Whenever one of the approvers had a comment, the approver wrote the comment on an adhesive note and attached it to the AFE form. It was often difficult to determine who had the printed copy of the AFE for review.

Lack of Transparency

There was also no way to view the entire portfolio of requests for project funding and approved projects. According to Sharon Gietl, VP of IT and CIO at The Doe Run Company, "Our manual process to obtain funding approvals was cumbersome and lacked the transparency we needed to make the best decisions. Our PMO needed a better way to see the entire project portfolio, share lessons learned, and capture data to perform analytics on project outcomes over a period of time."

Solution

Innovative-e helped The Doe Run Company create a Business Critical SharePoint solution by helping the customer implement the AFE business process and forms in SharePoint. However, the complex economic analysis was left in a spreadsheet. A custom process was put in place to push data from the economic analysis spreadsheet to the AFE data in SharePoint. Workflows were built using Nintex to automate the AFE approval process so

paper was no longer passed from one desk to another. Leveraging Nintex in building the workflows accelerated the implementation time. It also provided the following capabilities out of the box that enhance ease of use:

- a. Graphical real-time status of the workflow that help the user quickly identify the bottleneck
 - b. User friendly approval forms
 - c. Custom email notifications.
- Doe Run power users can maintain the workflow in house since they don't have to use Visual Studio in modifying the workflow.

The BCSP solution Innovative-e helped implement included the following features:

- The AFE forms are now implemented using InfoPath forms.
- The AFE is now controlled by a Nintex workflow in SharePoint instead of being passed manually from desk to desk.
- The Nintex workflow enforces a consistent process every time and ensures that the AFE is routed to the correct approvers.
- Any approver comments are captured electronically in the system.
- Any changes to the AFE are logged by the system.
- The AFE information and status are rolled up at a portfolio level.
- The stakeholders can easily see the status of an AFE and if approval bottlenecks exist.

"One of the key requirements for this system was that it would take advantage of our prior investment in SharePoint. We wanted a system that contained all project-related data. Since we were already using SharePoint libraries to manage project documents and SharePoint lists to manage project details, it just made sense to integrate functionality for project-related funding. Innovative-e helped us design a solution to manage all project-related data, from the portfolio level down to individual project details", says Callahan.

Benefits

The Doe Run Company's implementation of Innovative-e's recommended BCSP solution resulted in several marked benefits for the company. The AFE process was streamlined to provide greater visibility into each step of the AFE process for all team members. The use of InfoPath forms, rather than spreadsheets, makes data entry more user-friendly and improves the quality of data captured. Better visibility into the company project portfolio, combined with increased productivity, translates to real financial benefits to the customer, including a better-than-30% internal rate of return.

1. Better visibility into the company project portfolio

- o Visibility into the status of all AFEs
- o Increased visibility into the entire portfolio for project selection and prioritization (data can be filtered in many different ways)
- o Increased visibility into individual project health through roll-up of data from individual SharePoint project sites used to actively manage the projects.

2. Information for improving company processes

- o Having a common repository for project-related data allows queries to support better decision-making (e.g. an increase in the percentage of regulatory projects over budget may lead the PMO to focus training on cost management).

3. Reduced turnaround time for project funding

- o Increased productivity and decreased turnaround time via automation

4. More efficient business processes

- o Streamlined data entry
- o More consistent processes
- o Improved quality of data captured, resulting in less rework and mistakes
- o Improved data integrity during the approval process

5. Expected financial impact

- o Internal Rate of Return: 34%
- o Net Present Value: \$45,740
- o Payback Period: 2.3 years

6. Ease of maintenance

- o Leveraging InfoPath forms and Nintex Workflow provides the ability for Doe Run admins and power users to more easily and more rapidly make changes to the solution as their business and processes evolves.

7. The BCSP Partner ecosystem provides win-win-win for customers and Microsoft partner companies

- o Innovative-e and Nintex are both Microsoft BCSP partners, enabling both companies to come together to assist The Doe Run Company in implementing solutions that have a real, practical, and measurable impact and improve some of their business critical operations. The collaboration between Microsoft partners to help a customer realize greater efficiency and a ROI in business critical operations is a win for the customer, the partners, and Microsoft.

Business-Critical SharePoint (BCSP) is a Microsoft partner program that includes top solution and service providers who focus on LOB integration with SharePoint.