



CASE STUDY · ENERGY · PORTFOLIO MANAGEMENT

An initiative portfolio that continuously creates value and **reduces cost.**

A project-portfolio management model — process and technology — for a Fortune 50 Energy, Oil & Gas company, replacing fragile, hand-built budgets with one governed, agentic operating model.

Fortune 50 Energy, Oil & Gas · Energy, Oil & Gas · Project Portfolio Management

THE CHALLENGE

Strategic demand was full of exceptions.

Every capital cycle began the same way: each Department Director hand-collected a budget by chasing inputs across functions — up the chain and across silos — and every change to the assembled plan became one more exception to manage.

Manual, cross-functional collection

Directors collected demand by hand from teams that each measured work differently.

Fragile, monolithic budgets

One plan, one structure for everything — so every change rippled through it, and change was constant.

Slow decisions, costly change

Re-planning lagged reality. Change management was reactive, and capital calls were made on numbers no one fully trusted.

THE NEW PROCESS — STRATEGIC DEMAND TO CLOSURE

The new demand-to-closure process



Standardised strategic demand — every initiative routed through the same governed pipeline.

- 1 Strategic Demand Intake — structured to each department's capital & expense profile.
- 2 P50 / P90 Estimation — confidence-ranged numbers, comparable across the portfolio.
- 3 Architecture & Security Review — internal, AI-augmented, in-line.
- 4 Capital Risk Planning — risk priced before money moves.
- 5 Execution → Transition (if required) → Closure — a clean, governed finish.
- 6 In-house software runs its own track: Roadmapping → Execution → Cost-Value Reviews.



CASE STUDY · ENERGY · THE APPROACH

Compare like for like — then roll out in waves.

We rebuilt strategic demand around how each department actually spends, gave initiatives and operations their own targets, put senior practitioners — augmented by AI — on every architecture and security review, and set new OKRs on every vendor decision.



Capital & expense, by department

Cloud & Infrastructure and Corporate Business Applications get distinct targets — initiatives vs. operations, never lumped together.



AI-augmented architecture & security

Internal architecture and security reviews run inside the pipeline, accelerated by AI so depth no longer costs weeks.

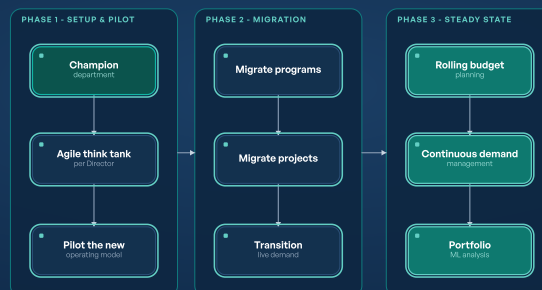


Vendor management on OKRs

New vendor-performance OKRs focus effort on the largest contracts and manage vendors as a measured risk.

PHASED ROLL-OUT — IN WAVES, WITHOUT STALLING

Phased roll-out — agile think tanks per Director



Adopted in waves to absorb migration and transition time without stalling live demand.

- 1 Phase 1 — Setup & Pilot with a champion department; an agile think tank per Director.
- 2 Phase 2 — Migrate programs and projects, transitioning live demand in flight.
- 3 Phase 3 — Steady state: rolling budget planning, continuous demand, ML re-balancing advice from portfolio and project history.



CASE STUDY · ENERGY · GOVERNANCE & OUTCOMES

Every initiative governed from the ground up.

A layered governance model makes every solution legible — from the cloud it runs on to the physical and logical architecture on top — and the stack itself is reviewed and improved quarterly. We redesigned and implemented steering-committee, questionnaire and expert-role responsibilities so that every new technology project follows this stack.

The governance stack



The governance stack

Infrastructure up to solution — each layer owned, measured and traceable.

- 1 Infrastructure & Cloud — the shared foundation everything stands on.
- 2 Vendor Performance — managed as a measured risk, on OKRs.
- 3 Enterprise Architecture & Security — the standards layer above it.
- 4 Integrations — how systems actually connect.
- 5 Physical and Logical Architecture — the solution, app and system, made clear.

THE OUTCOMES

30%

FASTER DELIVERY SCHEDULE
ACROSS PORTFOLIOS

40%

FEWER COMPLIANCE
EXCEPTIONS

20_{hrs}

PER MONTH RETURNED FROM
FINANCIAL REPORTING

- ✓ A single, trusted source of portfolio, program and project truth
- ✓ Rolling budget planning that re-balances the portfolio continuously
- ✓ Architecture, security and vendor risk governed in one operating model
- ✓ Faster decisions — change handled as routine, not crisis

Capital Delivery & Data Health Check

A focused diagnostic that maps your project and demand data and surfaces the top three focus areas.

FLEXIBILITY · DELIVERY SPEED · RIGOR

[Book a Health Check →](#)