Field Reality Meets Insight:
Bringing Power BI into Energy Operations

A global energy and petroleum services provider partnered with **Cedars BC** to turn scattered project data into real-time operational insight.

Real-time visibility and control over complex projects.

Before the change, Planner boards were fragmented, reporting was inconsistent, and delayed.

After the transformation, teams instantly shifted from reactive tracking to proactive project control.

USA

Industry
Petroleum & energy services

Department
Product Management & Operations

Engagement Model
End-to-End Dashboard Development

Know the Context

A global engineering and petroleum services company in Houston, Texas, operating across the Gulf relied on Microsoft Planner to manage thousands of interconnected tasks across offshore and onshore projects.

Despite using a digital platform, project managers still lacked clear visibility into real-time progress, accountability, and emerging delays.

Results Were Unclear

The issue wasn't the absence of data — it was the inability to translate it into clarity.
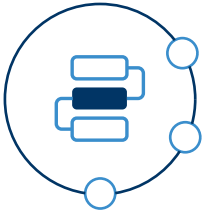
With managers tracking progress on separate Planner boards and manual follow-ups, reporting became duplicated, inconsistent, and slow.

○ Limited visibility into overall project progress

○ Difficulty consolidating project, task, and ownership data

○ Manual tracking that slowed reporting and added effort

○ No actionable insights to spot delays and bottlenecks early

Our Solution

Cedars BC was engaged to deliver a unified and intelligent **visibility solution.**

✓ Empower management with a single source of truth.

✓ Turning raw tasks into a clear, intuitive tracking system.

✓ Designing and developing a tailored Power BI dashboard connected directly to Microsoft Planner.

Key solution elements:

Real-Time Consolidation
All project and task data in one central dashboard

Task Breakdown View
Progress, status, and ownership for instant drill-down

Actionable Visuals
Shows delays, workloads, and trends to improve prioritization

Automated Updates
Eliminated manual tracking via automated refreshes and reporting
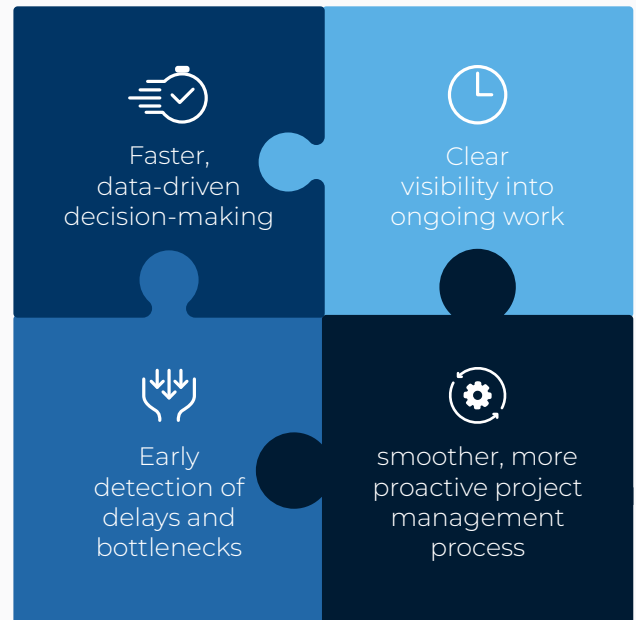
The Insight

The Power BI solution dramatically strengthened the client's ability to monitor, manage, and steer projects with confidence.

With full real-time visibility, project teams could act on insights instead of searching for information.

Project Discussions Shifted

*From "What happened?"
to "What will we fix next?"
A culture of anticipation instead of reaction was created.*

Faster, data-driven decision-making

Clear visibility into ongoing work

Early detection of delays and bottlenecks

smoother, more proactive project management process

The Insight

Unifying fragmented project data into a single, transparent system gave managers the clarity and control they were missing.

Cedars BC turned data into decisions, and reporting into action.

The Lesson

Dashboards create value only when they change behavior.

In this case, improved visibility led not just to better reporting, but to better performance

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