



More Compliant Operations  
Improved Data Quality  
Increased Efficiency

# Cohesive Solutions Helps Southern Electric Utility Optimize NERC Assets to More Effectively Support Compliance Requirements

## About the Client:

This wholesale power agency provides clean, reliable, and low-cost power for the 30+ electric utilities it manages. Organizations that work through this power agency benefit from reliability and operation enhancements, enabling them to better serve their customers.

## Business Challenges:

The utility industry is seeing regulations for reliability and safety get tighter as the years go on.

This innately poses a challenge to asset-intensive organizations in the industry to update their operations processes in order to remain in compliance.

The client connected with Cohesive Solutions to ensure their processes were meeting the strict compliance standards regulated by the North American Electric Reliability Council (NERC). It's important that these organizations are confident in their ability to comply with standards such as these, to serve their customers in the safest and most reliable way possible, and to avoid penalties.

This power agency was tracking the assets and their lifecycle with spreadsheets. This outdated practice caused a lack of consistency on critical details like naming convention and asset tags, and gathered an inadequate amount of information on the assets themselves.

They also lacked a business process for asset movement within their asset lifecycle.

## Task:

### Cohesive was brought in to:

1. Identify and assess the agency's existing data related to and representing their assets
2. Identify and assess the agency's current management of their asset lifecycle process
3. Identify opportunity for improvement within their process to more closely align with the regulatory obligations of the nuclear industry

## Action:

After conducting initial workshops with the client to identify their current processes and areas for improvement, the following enhancements were made:

- ▶ **Assets Loaded:** We transferred the client's NERC assets from existing spreadsheets into Maximo
- ▶ **Preventative Maintenance:** We created new Preventative Maintenance records for these newly loaded NERC assets
- ▶ **Historical Data Transfer:** We updated some of the client's historical work order data to reference the newly loaded NERC Assets
- ▶ **NERC Review Workflow:** We implemented a new workflow to sit on top of their existing work order completion workflow that would support a NERC review, further helping the client to comply to regulations.
- ▶ **Asset Application Enhancements:** We added new date fields for NERC assets, new automation scripts for managing the compliance dates, a new management report and an audition function.
- ▶ **Security Enhancements:** We added new signature options to secure the NERC data within the Maximo system.

## Business Transformations Achieved

**More Compliant Operations:** The clients business processes for asset tracking are more compliant with industry regulations. This is made possible because of the automated processes and tracking requirements inside of Maximo and reduced ability for human error.

**Better Data Quality, Reduced Human Error:** The autoscripts put into place when helping automate their processes inside of Maximo resulted in a reduced amount of human error, leading to a better quality of data which is used as a driver in decision making and provides a more accurate visualize of the current state.

**Increased Work Order Process Efficiency:** Processes are more streamlined and completed in less time when automated inside of Maximo.