ENBRIDGE

CUSTOMER SUCCESS STORY

# A large energy company transforms planning with one integrated solution

Steering Foundation | Integrated Planning & Reporting | AI-Enhanced Forecasting | Continuous Optimization

Enbridge is one of North America's largest energy infrastructure companies, operating pipelines, storage, and distribution networks across Canada and the United States. Its Operations & Maintenance Finance function had outgrown a fragmented combination of legacy tools, enterprise systems, and spreadsheets that made each planning cycle slow, manual, and difficult to govern.

## The challenge

Planning relied on two legacy applications, SAP BPC and Dcomp, and spreadsheets bridging gaps between systems. Data was spread across SAP, Oracle E-Business Suite, Oracle Cloud EPM, and historical planning databases, making one reliable view of the business difficult to establish. Before each cycle, Finance had to reconcile plan data, actuals, cost centres, and master data across multiple systems before planning could begin. Forecasting was time-consuming and highly manual. Each revision required exporting, consolidating, validating, and reloading data, while version control, approvals, and auditability were managed outside the system.

## The approach

Rather than introducing another disconnected solution, Enbridge consolidated budgeting, forecasting, and reporting into one governed planning platform built on its existing Microsoft and Azure environment.
Data from all source systems is automatically consolidated and reconciled before planning begins. Planners build budgets, forecasts, and scenarios directly inside Power BI using Power ON write-back, with version management, approvals, and workflows built into the solution.

## The outcome

Planning cycle was dramatically accelerated. Finance now works from one reconciled planning dataset across all source systems, with immediate access to version comparisons. Business users manage planning independently, creating versions, maintaining master data, and completing approvals without IT support.
Enbridge now runs Operations & Maintenance Finance planning across Canada and the United States on a single platform.

## At a glance

### BEFORE

- Legacy planning app and spreadsheets
- Manual reconciliations across multiple non-integrated systems
- Manual governance, approvals, and version control
- Canadian O&M only; U.S. expansion not feasible

### AFTER

- One governed planning platform across North America
- Significant reduction in turnaround time
- Automated reconciliation before planning begins
- Built-in version control, approvals, and audit trails
- One platform supporting Canada and the U.S.

> *"Centida's product expertise, collaborative approach, and understanding of our unique processes were critical to the success of the solution."*
>
> Jason Shem, Manager GDS Financial Alignment and Special Projects, Enbridge

## What improved

### 1. Planning cycle turnaround time significantly reduced

Planning cycles are now faster and more responsive. With data reconciliation automated and planning integrated directly into Power BI, Finance reduced the time spent preparing data and increased the time available for analysing business performance. Faster cycles allow the business to respond more quickly to changing conditions.

### 2. One reconciled planning dataset across all systems

Automated reconciliation replaced manual consolidation across SAP, Oracle E-Business Suite, Oracle Cloud EPM, and legacy planning databases. Finance now works from one consistent planning foundation for budgeting and forecasting. Version comparisons and plan-versus-actual analysis are available immediately, allowing discussions to focus on business performance instead of data quality.

### 3. Planning, governance, and approvals in one environment

Version management, approvals, security, and auditability now operate within one governed planning environment rather than across disconnected tools. Users create, copy, submit, approve, and lock planning versions while complete audit trails automatically record every change. Security is managed centrally, with users only accessing the planning areas they are responsible for.

### 4. Finance operates planning without IT dependence

Business users now create planning versions, maintain master data, submit plans, and complete approvals directly within the platform without routine IT support. Planning cycles move faster because Finance teams manage the full planning process themselves. Reducing operational dependence on IT also lowered long-term complexity and protected previous technology investments.

### 5. One platform scaled across North America

Canadian and U.S. Operations & Maintenance Finance now operate on the same planning foundation, supporting multiple currencies and business structures while maintaining consistent planning processes across North America. New business requirements extend an existing planning foundation rather than creating additional planning tools and reconciliation work, making the platform scalable as the business evolves.

**Centida Consulting** helps companies build reliable planning and decision systems - spanning steering foundation, integrated planning & reporting, AI-enhanced forecasting, and continuous optimization - translating strategy into a steering architecture that leadership teams use every day.

**Facing a similar challenge?**
Let's discuss how a structured steering approach could work for your organization.