

Operational Expenditures Planning for an Energy Company

Client Spotlight



Situation

An energy company has operating sites distributed in remote areas, and a very strong central analytics team. However, they were struggling with a home-grown planning tool and didn't see enough return on investment from many major software companies.

Power BI reporting was already in place in the company, including pre-existing semantic data models.



Solution

Power BI was extended into a planning solution by using existing operational expenditure (OpEx) data models and simply adding the ability for users to forecast their expenses.

A model was developed that made it fast and easy for team members in the field to add their expenses along with commentary to support it.

Workflow features were also introduced to allow users to 'submit' forecasts when complete.



Results

This solution maximized functionality while minimizing additional new technology to their existing stack. Users who were already familiar with Power BI were able to now plan with minimal additional training needed.

By building forecasts directly within Power BI, the data was also immediately available for consolidation and analysis with the central team. This work saved time, improved accuracy, and boosted user experience all at once.



A mid-sized energy company focused on exploration, development, and production of oil and natural gas. Known for leveraging innovative technologies to optimize resource extraction and committed to sustainable practices in the energy sector. Operates primarily in key resource-rich regions to deliver reliable energy solutions.

Tags: Energy, opex planning, time savings, Aimplan

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