



Industry

Petroleum products transportation

Employees

Over 700

Founded

1962

Headquarters

Atlanta, Georgia

“Now with Clarity Performance Management in place we have multiple budget versions based on the company’s performance throughout the year. We can now track how our progress is doing against our target, against our budget and against different scenarios; we never had that ability before,”

Kelly Nodzak, accounting manager – Colonial Pipeline

➤ Situation Analysis

Colonial Pipeline Co. is an interstate carrier of petroleum products. Each day, it delivers an average of 96 million gallons of gasoline, kerosene, home heating oils, diesel fuels and national defense fuels to shipper terminals in 12 states and the District of Columbia.

The 5,519-mile Colonial system transports these fuels from Texas, Louisiana, Mississippi and Alabama to 267 marketing terminals located near the major population centers of the southeastern and eastern seaboard.

As the world's largest refined petroleum products pipeline system by volume, Colonial's finance department is presented with the demanding task of budgeting and planning for such a large and complex organization.

Kelly Nodzak, accounting manager for Colonial Pipeline, needed a solution that would reduce the effort and challenges associated with using Excel spreadsheets to consolidate and analyze the budget. Colonial was using an accounting package that lacked the capability to effectively store and retrieve budget or forecast data in a timely fashion. The outcome was a lengthy budget cycle that required numerous manual entries into Excel spreadsheets. This approach resulted in the finance department at Colonial spending precious time managing the budget process rather than analyzing the results of the budget.

“One of the key deliverables was to eliminate the current method of using Excel as a database to store information. During every budget cycle approximately 400 users would create their own specialized and personal Excel budget spreadsheets, then re-key a subset of their personal budget into the corporate budgeting system,” says Nodzak. “Since you couldn’t upload or download the data the budget manager would have to manually consolidate the information into another spreadsheet and re-key that into the budget system. Our goal was to have the budgeting data be housed centrally so there was no redundant entry and users could easily upload and download data while maintaining the flexibility of Excel.”

In order to reach this goal Colonial Pipeline’s finance department wanted to find a partner and software product that provided them the required solution. While they wanted a world-class company with a proven product history they also wanted a solution that fulfilled the following requirements:

- Easy to use
- Excel-like interface
- Minimal IT involvement after installation
- Web-based
- Reforecasting capability

“Many of the budgeting systems’ end-users spend a lot of time traveling. As a result the solution had to be Web-based and provide fast response time,” says Nodzak. “Also, not all of our users are computer savvy so ease of use was very important and since everyone was already comfortable using Excel we wanted something with the same Excel look and feel. Additionally we wanted a product that didn’t place a heavy burden on the IT department.”

