

CASE STUDY

RHEINENERGIE: FROM EXCEL TO INTEGRATED FINANCIAL PLANNING

RheinEnergie AG, one of the leading energy providers in the German state of North Rhine-Westphalia, set out to digitise its financial planning as part of a comprehensive transformation project. The company-wide migration from an older SAP system to SAP S/4HANA presented an opportunity to fundamentally rethink planning. Previously, financial planning was primarily carried out using decentralised Excel files, which led to poor data quality, time-consuming manual processes, and a lack of transparency. RheinEnergie recognised the need for an integrated EPM solution to enable efficient and high-quality centralised planning.

THE CHALLENGE

The aim of the project was to implement a centralised **planning platform** based on **Jedox** for **cost centre, cost type, and profit centre planning**. In the medium term, the application is also intended to support balance sheet and cash flow planning, as well as further modules. Particular focus was placed on improving the quality of planning data and automating interfaces to the SAP system.

The project was embedded within the SAP migration and therefore had to contend with ongoing structural changes and system adjustments. In parallel, data structures and source systems – particularly SAP S/4HANA, SAP BW, and Tableau – were redefined, adapted, and integrated.

THE PROJECT

Strategy consultancy Horváth was responsible for the professional design of the project. In addition to the technical implementation, bdg also took on a comprehensive consulting role regarding data structures, process design, and interface management. Tableau continued to be used as the reporting solution; the project therefore concentrated primarily on planning and forecasting.

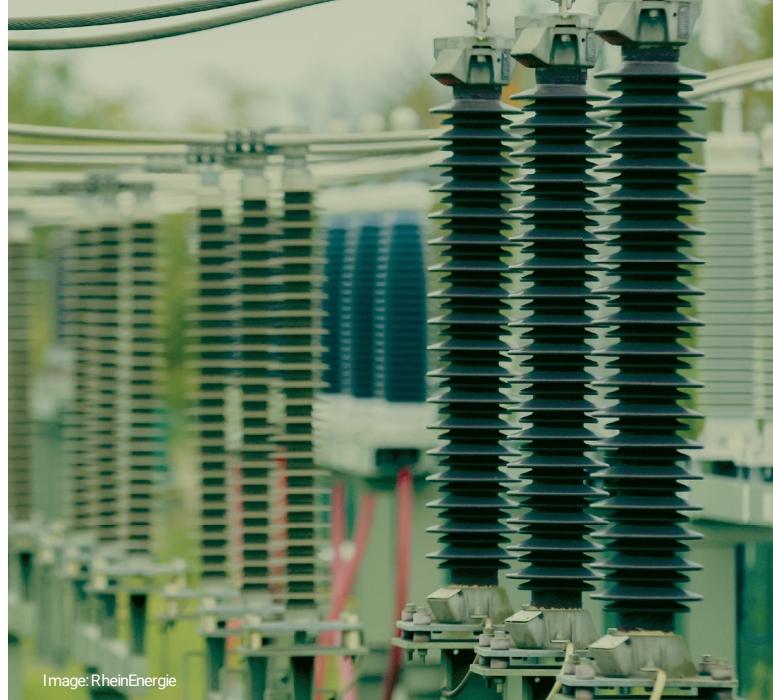
THE OBJECTIVES

The project pursued several overarching objectives:

- **Process Standardisation:** Harmonising and structuring financial planning across the entire organisation.
- **Data Quality and Transparency:** Enhancing the traceability and validation of planned figures.
- **Efficiency Gains:** Shortening planning and forecasting cycles, reducing manual tasks.
- **System Integration:** Seamless connection of SAP S/4HANA and SAP BW to the new Jedox platform.
- **Future-Proofing:** Preparing for additional planning modules such as balance sheet, cash flow, investment, and personnel planning.

CUSTOMER BENEFIT

ENHANCED DATA QUALITY, AUTOMATED PROCESSES AND A CENTRALISED, FUTURE-PROOF PLANNING PLATFORM



THE APPROACH

The project began with an **in-depth analysis** of the existing planning processes and system landscape. It quickly became apparent that the concurrent SAP migration introduced many unknown factors and unresolved system issues.

In close collaboration with Horváth – who oversaw the transformation project and provided process designs – bdg deliberately went beyond the traditional role of an implementation partner, also taking on **coordination and advisory functions** at the interface between SAP, Jedox, and the business departments. bdg played a key role in **consolidating data sources** and designing **efficient interfaces**.

Through the integration of workflows, automated data validations, and interfaces with SAP, a flexible, transparent, yet robust **planning platform** was established. Initial modules – particularly classical planning – **went live within the first year of the project**.

THE COLLABORATION

The collaboration between RheinEnergie, bdg, and Horváth was characterised by pragmatism, openness, and mutual trust.

bdg was able to contribute its **extensive experience in the energy sector**, which was also a decisive factor in the software selection. The choice fell on Jedox.

WE ARE BDG

We are the better decisions group (bdg), an international consultancy for business intelligence (BI) and corporate performance management (CPM) solutions. As a long-standing partner of leading software providers such as Board, Jedox and SAP Analytics Cloud (SAC), we have been delivering customised solutions and best-practice approaches for planning, reporting and analysis for 20 years.

THE RESULT

The benefits for RheinEnergie are clearly measurable:

- **Quality Improvement:** Data quality and planning depth have significantly improved. Earlier planning processes based on simple extrapolations of prior year values have been replaced by detailed input and system-supported workflows.
- **Efficiency:** Uploads to the SAP system are now automated with a single click rather than manual, saving time and resources.
- **Validation & Transparency:** Centralised reports and workflows enable structured review and approval of plans.
- **Integration & Flexibility:** Jedox is now established as the standard tool in financial planning. Further planning topics are set to be integrated in subsequent projects.

SUMMARY

The digitisation of financial planning at RheinEnergie with Jedox stands as a prime example of a successful project in the energy sector. With bdg as both a technological and consulting partner, a **modern, centralised planning solution** was established that **significantly improves** both efficiency and the quality of planning – an investment that clearly pays off.

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TOUCH

