



DISCOVER

CTRM SYSTEM SELECTION CASE STUDY

HOW CAPSPIRE ADVISED PEMBINA PIPELINE CORPORATION IN EVALUATING OPTIONS IN THE MARKETPLACE AND DECIDING ON AN OUT-OF-THE-BOX ETRM SYSTEM

THAT MET ALL THE COMPANY'S NEEDS

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THE ASSIGNMENT

Canada-based Pembina Pipeline Corporation, one of the largest providers of energy transportation and midstream services to North America for more than 65 years, engaged capSpire to help the company replace its legacy in-house system used to run the business with a new ETRM system.

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THE GOAL

Pembina is seeking to transition away from an aging technology platform and, instead, enjoy an upgraded system with full vendor support, seamless updates, and more automation, as well as the incorporation of best practices into the system design. Ultimately, company leadership wants a system that runs smoothly and efficiently, with less need for constant internal oversight and excessive manual effort from personnel.

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THE PROBLEM

For more than 15 years, Pembina had been using an in-house system, which now lacks technical support, to run the business. Company leadership decided to replace this system with an updated, off the shelf ETRM system and rail management system.

Initially, Pembina attempted to identify a new system in the marketplace independently, but couldn't find a solution that management felt was optimal. After all, it can be challenging for companies without a deep knowledge of ETRM vendors or the inner workings of these systems to fully ascertain whether a system can align with company needs—with or without customization.

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THE PROBLEM CONTINUED

Pembina attempted to replace their in-house system with a custom solution with a partner but stopped at the design phase.

After these setbacks, and with concerns about allocating further financial resources into developing a new system without obtaining timely results, Pembina hired capSpire to serve as an advisor, given our specialization in the energy industry and our expertise in technology and process improvement to support clients in the commodities space. Pembina asked capSpire to evaluate its options in the marketplace, manage the process for selecting the new ETRM system, and guide management in making a decision.

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THE SOLUTION

capSpire took the client on a journey from weighing multiple options in the marketplace to identifying an ETRM system that would work well in terms of functionality, low level of required customization, and cost. Compared to stalled previous efforts, capSpire was able to complete this work efficiently within a matter of months.

Phase 1: capSpire consultants evaluated Pembina's entire business to obtain an understanding of current processes and the business drivers behind each decision. With this knowledge, capSpire narrowed down the list of vendors who met at least 50% of Pembina's requirements.

Phase 2: capSpire solicited a request for proposals (RFP) from the top four vendors. This involved asking vendors to complete a detailed questionnaire that probed into their capabilities and services. The goal was to further refine the list of options to vendors who could meet at least 80% of Pembina's requirements without system customization.

Phase 3: capSpire invited the final two prospective vendors to participate in a demo in which Pembina personnel had the opportunity to see and experience how each system would work using the company's actual data.

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THE SOLUTION CONTINUED

At this point, capSpire was able to recommend an ETRM system to Pembina. Whenever system customization was necessary, capSpire consultants explained to the client whether the customization was more extensive and costly—or not—and whether the additional effort was truly justified. And throughout the entire process, capSpire consultants cut through marketing and sales jargon to enhance Pembina's understanding of vendor capabilities.

The implementation of the ETRM system, which capSpire is also spearheading to ensure that it aligns with Pembina's expectations, is currently in progress.

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THE BENEFITS

- + Gained a long-term partner with an in-depth understanding of both Pembina's business and ETRM system technology.
- + Was able to outsource the burden and complexity of selecting an ETRM system to an expert and refocus on the core business to drive value.
- + Bridged the gap between what company personnel desire and what vendors want to show by obtaining an accurate picture of vendor capabilities.
- + Empowered to make an impactful decision quickly based on simplified, well-researched information.
- + Acquired confidence that the implemented ETRM system will function as envisioned—increasing efficiency and productivity—and will deliver the expected return on investment.

“CapSpire's deep experience, their understanding of our business and the structured process they led us through were critical to gain the business's trust. Partnering with the capSpire team was essential to Pembina's successful selection of an ETRM platform.”

-Marcio Ghelfi
Manager, IT applications

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YOUR BUSINESS.
WE KNOW
THE SYSTEMS
THAT POWER IT.**

For more information, reach out
info@capspire.com

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