

Leveraging the Right Digital Platforms To Drive Efficiency and Mitigate Risks

Client

A \$16 billion-dollar Mid-Atlantic energy transporter offering reliable electricity and natural gas for nearly 7.5 million customers throughout 18 states to energize residents and commercial businesses

- ▶ Oil and gas and nuclear plants are based throughout the mid-Atlantic region
- ▶ Solar power facilities are prevalent in the U.S.
- ▶ Safety and well-being of the employees, line workers out in the field and the general population remain a top priority

Industry

Energy and Sustainability

Services

Business Intelligence and Data Analytics; Digital Platform Integration

Situation

The Mid-Atlantic energy transporter reached out to Cherry Bekaert's Digital Advisory practice on ways to monitor their compliance standards while mitigating risks. With solar



energy reducing the world's environmental footprint and combating climate change, the client has placed a priority on the development of renewable energy, quadrupling the amount of solar and wind generation in their 15-year plan. Cherry Bekaert's Digital Advisory team is currently expanding the project's scope to bring a sustainable energy future within reach for all forms of energy transmission.

Mitigating Risks and Minimizing Disruption Through Automated Workflows

With application modernization relying upon Microsoft, the Firm and the energy transporter continue to drive sustainability measures and expand market reach. Our Digital Advisory team worked alongside with the client to build out ET-ARMOR (formerly known as Team Tracker) – a modernized, re-platformed workflow solution leveraging SharePoint to migrate from a legacy “homebrewed” network app built in 2000. Due to security risks, the energy transporter turned to a trusted Microsoft partner, Nintex, to accomplish workflow automation and forms. With the [Microsoft SharePoint](#) and [Nintex](#) solution, challenges can now be addressed in real-time while mitigating risks and minimizing disruption.

Automating Compliance Management

Fulfilling advanced safety models is a significant component in energy policy and risk management. North American Electric Reliability Corporation (NERC) develops and imposes compliance standards to annually assess the continued safety protection and operations of the electrical grid.

NERC data is categorized as highly sensitive and in order to comply with protecting data from unauthorized access, compliance documentation can only be on the SharePoint on-premises server. Its capability standards adhere to industry standard ratings and documents data simultaneously. The client enlisted the help of Cherry Bekaert's team to develop a digital solution for the SharePoint, focusing on performance control and quality corrective actions to flag rating declines. With the solution in place, they can identify and document root causes, execute corrections in real-time and develop "what-if" scenarios to mitigate declining ratings and risks while improving grid resiliency.

Fulfilling advanced safety models is a significant component in energy policy and risk management. Our team encrypted the monitoring of their compliance and safety rankings. The majority of the project performed for the energy transporter spun around their electrical transmission (ET). We worked with their internal IT PMO office to migrate more than 500 workflows to Microsoft Power Automate workflows.

Microsoft 365 Power Platform Advances Governance of NATF

The North American Transmission Forum (NATF) is a membership organization with more than 8,000 members across U.S.-based energy companies that rely heavily upon compliance, standards, collaboration and knowledge-sharing practices. Their mission is to advance industry performance and inspire the highest reliability levels in the electric transmission systems' operations by sharing detailed and timely information, including lessons learned and superior practices. This includes hosting constructive peer challenges to foster effective and efficient reliability improvements, thus igniting collaborative knowledge-sharing environments for companies rooted in safety and compliance. As an NATF member, the energy transporter wanted to ensure the organization's practice areas monitored and interacted with this global membership resource. In response, we built an all-encompassing custom SharePoint portal for all NATF activities. To monitor and foster collaboration, we leveraged

Microsoft Power App to record activities, created automated workflows to log activity and built a monthly roadmap to flag non-participants. Leveraging Power BI, our team built executive dashboards and data models from the NATF database to track performance and activities to further ensure that the energy transporter was partaking in all the valuable resources NATF offers. In turn, we built a digital resource with an industry solution approach by leveraging Microsoft technologies; it can be utilized across the energy industry to leverage NATF guidance and further the importance of compliance and safety.

Empowering the Future of Energy on the Horizon

Safeguarding affordable, reliable and modern energy services remains to be the primary goal for energy companies. Enhancing renewable energy standards throughout the electric transmission grid is the solution to furthering clean energy resources and obtaining renewable energy certificates across the U.S.

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