

The Partner Companies Transforms Financial Planning and Reporting with Oracle Cloud EPM and Peloton Consulting Group

The Partner Companies (TPC) is a global consortium of specialty manufacturing companies delivering mission-critical solutions to customers across aerospace, defense, energy, medical, clean energy, electric vehicle, technology, and telecommunications industries. Founded in 1997 and headquartered in Chicago, TPC has grown into an international organization providing precision parts, components, and assemblies for some of the world's most demanding applications. As TPC continued to expand through its operating companies, leadership recognized the need for a more modern, scalable approach to enterprise financial planning and reporting.



Business Challenges

TPC's financial planning and reporting environment relied heavily on fragmented, Excel-based processes that limited efficiency and insight. Budgeting and forecasting for income statements, balance sheets, and cash flow were performed offline across dozens of spreadsheets, creating labor-intensive, people-dependent workflows. Consolidation of these templates each quarter required significant manual effort and increased the risk of errors and delays.

In addition, management reporting was largely Excel-centric, requiring repeated data extracts and manual formatting for each reporting cycle. Although TPC had invested in Oracle Cloud EPM, the organization was not fully leveraging its advanced planning, reporting, and integration capabilities. The lack of integrated "what-if" modeling, automated calculations, and centralized data management made it difficult for finance teams to focus on analysis and strategic decision-making.

Approach

TPC partnered with Peloton Consulting Group to modernize its planning and reporting processes by implementing Oracle Cloud EPM Planning and optimizing its overall EPM architecture. The engagement began with a strategic discovery phase, during which Peloton worked closely with stakeholders to identify pain points, define improvement opportunities, and establish a best-practice roadmap for success.

Peloton enabled self-service planning and forecasting capabilities for TPC's operating companies, eliminating the need for corporate FP&A to manually consolidate templates. The solution introduced system-driven balance sheet and indirect cash flow planning, enhanced dimensionality for future use, and centralized data into a single source of truth. Reporting and analysis were redesigned and automated using native Oracle Cloud EPM tools, while data management and integrations were streamlined to support systematic, repeatable processes.

Business Impact

With Oracle Cloud EPM in place, TPC significantly improved efficiency, accuracy, and agility across its finance organization. Core monthly reporting consolidation was reduced from five business days to fewer than two, allowing teams to shift time away from data wrangling and toward analysis and insight generation.

Finance and FP&A teams now operate within a centralized, scalable planning and reporting environment that supports faster decision-making and improved usability with minimal IT dependency. Automated integrations and calculations have enhanced consistency and control, while the solution architecture establishes a strong foundation for future capabilities, such as capital planning, departmental detail planning, customer planning, and debt covenant management.

Summary

The Partner Companies' implementation of Oracle Cloud EPM represents a critical step in modernizing enterprise financial planning and reporting. By partnering with Peloton to replace manual, spreadsheet-driven processes with a centralized, automated EPM platform, TPC has strengthened operational efficiency, improved insight, and positioned the organization for continued growth. The solution provides a scalable foundation that empowers finance to act as a strategic partner to the business as TPC expands globally.



About Peloton Consulting Group

Peloton Consulting Group has the vision and connected global capabilities to help organizations envision, implement, and realize the benefits of digital transformation. Our team has the best practices, knowledge, industry expertise, and know-how. We make digital transformation a reality by leveraging Enterprise Performance Management (EPM), Enterprise Resource Planning (ERP), Supply Chain Management (SCM), Human Capital Management (HCM), Customer Experience (CX), Analytics, and Data Management for the cloud. Through connected capabilities, we bring people, processes, and technology together. We help organizations go further, faster. That is the Peloton way!