

## CASE STUDY

# Capital Planning at Scale

Managing \$2.8 billion in annual capital investment across hundreds of utility systems and over a dozen states is not a planning problem — it's a coordination challenge of a fundamentally different order. For one of America's top investor-owned water utilities, that coordination happened in spreadsheets.

Each year, two dedicated senior analysts spent five months manually extracting data from corporate systems across finance, engineering, treasury, and operations — assembling a master model for a \$14 billion, six-year capital portfolio that included more than 10,000 active projects. The model was vast, fragile, and dependent on institutional knowledge held by a small number of people. One broken link. One version mismatch. One analyst change — and the plan was at risk.

The plan got made every year. But it couldn't be made faster, it was difficult to defend under regulatory scrutiny, and it couldn't keep pace with the scale of the program it was supposed to manage. Something had to change.

**40%**

**FASTER PLANNING CYCLE**

From 5 months to 3

**10,000+**

**PROJECTS UNDER MANAGEMENT**

Across 255 utility systems

**\$14B**

**CAPITAL PORTFOLIO**

6-year rolling program

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**CLIENT** Top 5 Investor-Owned Water Utility

## APPROACH

## The Solution

Invizion replaced the spreadsheet process entirely. Rather than analysts manually extracting and reconciling data from multiple corporate systems, Invizion's automated import engine pulls directly from the utility's existing platforms — eliminating the manual links, lookups, and formulas that made the old process so fragile.

With all 10,000+ projects unified in a single platform, the capital planning team gained something they'd never had before: a complete, real-time view of the entire \$14 billion portfolio. Projects without fully-developed plans were automatically profiled based on historical spending patterns. Funding constraints, priority weightings, and escalation assumptions were set once and applied consistently across the hundreds of utility systems.

Scenario analysis — testing funding cuts, project deferrals, or priority changes across a multi-billion-dollar portfolio — went from a multi-week rebuild to a real-time exercise. When leadership asked "what happens if we reduce the program by 10%?", the answer was available in minutes, with the downstream impacts visible across every system in the portfolio.

The collaborative review process that previously required five months of back-and-forth iterations now completes in three — with all stakeholders working inside the same platform, not trading spreadsheet files.

**RESULTS/IMPACT**

## The Results

Invizion reduced the utility's annual capital planning process by two months – a 40% decrease in planning time – while significantly increasing data confidence and stakeholder collaboration across the organization.

Outcome	Detail
Automated data integration	Actual costs and forecasts from multiple corporate systems merged automatically – no manual extraction required.
Monthly performance reporting	Performance reports prepared with less effort and more accurate information, available to all stakeholders in real time.
Flexible variance management	Variance tracked by region, district, type of work, and project manager – giving leadership the visibility to act quickly when projects slip.
Rapid capital reallocation	When project delays or budget changes occur, the impact is visible immediately and capital can be reallocated to prioritized projects without rebuilding the model.
10,000+ projects, one platform	The entire capital portfolio – across 255 utility systems in 13 states – managed in a single, unified system for the first time.

*“Invizion streamlined our annual capital planning by quickly replacing our tedious and manual processes to link and relate large datasets out of our corporate systems.”*

CAPITAL PLANNING EXECUTIVE, TOP 5 INVESTOR-OWNED WATER UTILITY

## About Invizion

Invizion is a strategic advisory and technology firm that helps federal agencies and large organizations achieve clarity in complex, data-intensive environments. We combine advanced analytics, program management expertise, and purpose-built platforms to help clients make faster, better-informed decisions.



**Guy Barlow**

President, Invizion

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