



Bottling Better Business Planning with Oracle Cloud and Peloton Consulting Group

Coca-Cola Southwest Beverages (CCSWB) is one of the largest Coca-Cola bottlers in the United States. CCSWB produces, markets, and distributes Coca-Cola brands across Texas, New Mexico, Oklahoma, and Arkansas. As part of a vast network of independent bottling partners, CCSWB plays a critical role in delivering iconic products to customers while managing a complex, large-scale operation. To support continued growth and operational excellence, CCSWB recognized the need to modernize the financial planning and reporting processes that underpin strategic decision-making.



Business Challenges

Like many fast-moving consumer products organizations, CCSWB's finance organization was managing growing complexity with tools and processes that were no longer built for scale. Financial planning and reporting relied heavily on large, unstable Excel workbooks, legacy Access databases, and fragmented offline models that required significant manual effort to maintain.

These disconnected processes made it difficult to consolidate financial plans, support robust forecasting, and efficiently compare actuals vs. forecast. Labor and operating expense planning lacked flexibility and driver-based modeling, while manual data mapping and reconciliation created inefficiencies and risk. Leadership needed a more integrated, scalable approach to improve planning agility, strengthen data integrity, and provide the visibility required for faster, more informed decisions.

Approach

To help define and deliver a modern planning environment, CCSWB partnered with Peloton Consulting Group to lead a Global Design initiative and implement Oracle Cloud EPM as the foundation for transformation.

The engagement began with Peloton connecting people, processes, and technology by identifying and prioritizing business requirements, defining the future-state Oracle Cloud EPM architecture, and establishing a phased implementation roadmap. From there, Peloton implemented Financial and Workforce Planning capabilities using Oracle Cloud EPM, incorporating best-practice driver calculations, multiple labor planning methodologies, and extended forecasting and long-range planning capabilities.

The solution also included a purpose-built reporting and analytics model to automate management reporting, support COGS variance analysis, and enable ad-hoc analysis and self-service reporting. Automated data management and integration improved the flow of master data and inputs from source systems while providing consistent governance across hierarchies and reporting structures.

Business Impact

The transformation delivered significant improvements in efficiency, insight, and strategic planning capability.

Manual, duplicative processes were eliminated. As a result, cycle times across planning, forecasting, monthly reporting, and variance analysis were reduced by one full day. Driver-based modeling and integrated scenario analysis gave finance teams the ability to simulate outcomes, flex business drivers, and quickly assess financial impacts. This transformation enabled a more agile and responsive planning process.

Summary

Coca-Cola Southwest Beverages transformed a fragmented, manually intensive planning environment into a modern, integrated Oracle Cloud EPM platform designed for agility and scale.

By partnering with Peloton, CCSWB established a stronger foundation for financial planning, forecasting, reporting, and analytics. Efficiencies improved. Insights were enhanced. And the finance organization was able to focus less on process and more on driving the business forward.



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 AI, 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!