CAPITAL PROJECTS:

CASE STUDY

INFORMATION-DRIVEN CAPITAL PROJECTS

INDUSTRY
Oil and Gas

COUNTRY
United States

ISSUE

Improve findability and integrity of critical information tied to upstream assets.

SERVICES DELIVERED

- Business Process Automation
- Go-Live Support and Reinforcement
- Metadata Modeling
- Pertempo™ for SharePoint
- Taxonomy Development
- Training Strategy and Curriculum

THE SOLUTION

- **Pertempo™** solution design, development and deployment that reflects how users think about their information.
- **30+ years** of records and information management experience to deploy the solution, conduct user-testing, migrate content, and provide post-implementation support.

Capital projects represent a significant financial, human resource, and opportunity cost investment for any organization. Even when a capital project ends, investment in the developed asset continues as it transitions into production and operates for years and decades to come. During an asset's lifespan, information is generated at great expense, yet this information is rarely curated adequately, leading to issues such as poor findability, information loss, uncertainty about its accuracy, lack of version controls, and in some cases, the added cost of recreating information.

Facing enormous time-to-operations, time-to-market, and personnel costs, any improvements in information management and knowledge worker efficiency have the potential to pay huge dividends.

THE BUSINESS PROBLEM

Our client, a Global 100 integrated energy company, operates across the petrochemical spectrum including upstream/midstream/downstream oil and gas, and chemical manufacturing. With operations in more than 40 countries, its products set the standard in their industry categories and are familiar to consumers around the world. This case study describes challenges our client encountered when managing information for major capital projects for its upstream oil and gas business units, and how Access Sciences' Pertempo solution successfully addressed these challenges.

Upstream oil and gas assets often have a lifespan of 30 or more years encompassing cycles of exploration, development, and production. In order to monetize these assets, energy companies invest enormous sums to design and develop the infrastructure needed to advance from exploration activities to a producing field – a process known as a development project. While this infrastructure can take many forms based on the needs of the specific asset (e.g. undersea pipelines, production platforms, LNG plants, etc.), at a high level, each project's requirement to rigorously capture, organize, secure, and protect its information is similar.

To develop its upstream assets, our client formed a Development Business Unit (Development) devoted to the full life-cycle of capital projects and the subsequent hand-off of critical information to its Production Business Unit.

Access Sciences

THE RESULT

- User input in the Pertempo™ design that reflects the site navigation, personnel use and interacts with their information, enables users to look for content using meaningful search terms and locate the same information from different points of view across functions and within projects.

- With activities in over 40 countries, business terminology varied widely. The Pertempo™ methodology enabled the Access Sciences team to synthesize this terminology into a common classification model, allowing users to identify, manage, and retrieve information with confidence.

- Our team facilitated user engagement, adoption, and long term sustainability to ensure Development realized its return on investment by:

    - Creating a support site and a comprehensive training strategy and program
    - Providing training to end users and administrators around the globe
    - Transitioning governance processes and tools to client administrators

THE BENEFIT

- ☑ **Easily find information across asset development groups**
- ☑ **Reduced time spent finding critical information using retail website-like search**
- ☑ **Shared knowledge reduced duplication of effort**

Development is organized into 30+ distinct business functions (e.g. project management, mechanical engineering, HSE) and executes a portfolio of up to 50 capital projects with average budgets of approximately $1B USD. Consequently, effective use and management of this highly-matrixed BU's information and knowledge is essential.

THE CHALLENGE: USE INFORMATION TO DRIVE CAPITAL PROJECT AND OPERATIONS EFFICIENCY

Prior to engaging Access Sciences, Development attempted to achieve this daunting objective by directing each function and capital project to collaborate using SharePoint as it saw fit. Without common standards and a shared architecture across these groups, Development discovered that this uncoordinated approach did not bring it closer to its goal. Instead it resulted in a number of issues, including:

- Siloed functions and projects lacking integration.
- Websites built with minimal user feedback, not mirroring real business needs.
- Over 600 overlapping, independently managed sites by 200 staff, in different development phases.
- No uniform template for projects to ensure consistency and allow for customization.
- Users facing difficulties accessing needed information, causing repeated efforts.
- Poor collaboration across functions and regions, impeding the sharing of insights.
- Dependence on personal connections for information retrieval, undermining systematic knowledge management.

THE SOLUTION: FINDING INFORMATION WITH CONFIDENCE

Access Sciences collaborated with Development SMEs to design, develop, and deploy a solution based on Access Sciences' Intelligent Information Management framework, Pertempo™. Pertempo™ uses the client's standard information management platform (in this instance, Microsoft SharePoint) and leverages the platform's standard features and functionality with no application customization.

Prior to the Pertempo™ deployment, confidently finding information about an upstream asset was, at best, hit or miss, and the older the information, the likelihood the information could not be found is higher.

Now, information is automatically and rigorously classified and is typically found within 3-4 clicks. The end result is a more efficient, higher performing, and less frustrated workforce and information that is properly curated so that it can be found years after the fact, avoiding recreation at enormous cost.