

# CASE STUDY

## Information-Driven Capital Projects

 **INDUSTRY**  
Chemicals

 **COUNTRY**  
USA



### ACCESS SCIENCES ENABLES DEVELOPMENT PROJECT SUCCESS

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.

### ISSUE

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

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

### SERVICES DELIVERED:

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



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. Development is organized into over 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.

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## SOLUTION

- ✔ **Pertempo™ solution design, development, and deployment that reflects how users think about their information**
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### **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:

- A fragmented and disconnected environment where each function and project worked in isolation from each other in separate information silos
- Sites that were developed with little or no user input, and that did not model the function or project’s business processes
- Over 600 sites, independently administered by 200 employees and contractors, in different states of completion and with overlapping purposes
- Absence of a capital project template to drive consistency and standardization while supporting configuration to accommodate each project’s unique requirements
- Users who were unable to access and view content relevant to their work, often resulting in duplicated effort
- Inconsistent collaboration between functions, projects, and business units – often in different countries – making it difficult to leverage prior work and lessons learned

- Inability to confidently locate information without reliance on personal relationships

In the end, Development turned to Access Sciences for help in deploying a solution where it could organize, maximize, and leverage its information.

## **ACCESS SCIENCES' SOLUTION: INTELLIGENT INFORMATION MANAGEMENT USING PERTEMPO**

To develop an optimal solution, 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.

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### **BENEFITS**

- ✓ **Easy to find information across asset development groups**
- ✓ **Greatly reduced time spent finding critical information using retail website-like search**
- ✓ **Ability to share knowledge reduced duplication of effort**

User input was essential in designing a solution that reflects in the site navigation, and Development personnel use and interact with their information. Since all users do not think alike, Pertempo™ enables them to look for content using meaningful search terms and locate the same information from different points of view across functions and within projects.

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With activities in over 40 countries, Development's business terminology varied widely. Our 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.

To prevent users from being stymied by overly stringent security restrictions, our team took a "no harm to know" approach and created an open access model, limiting access only where necessary. We also designed the solution to automate the application of policies, ensuring information compliance by users when interacting with the content.

In addition to our Pertempo™ framework, we also leveraged Access Sciences' 30+ years of experience with records and information management projects to successfully deploy the solution, conduct user-testing, migrate content, and provide post-implementation support. The Access Sciences team facilitated user engagement, adoption, and long term sustainability to ensure Development realized its return on investment. We accomplished

these objectives 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

## **FINDING INFORMATION WITH CONFIDENCE IS PRICELESS**

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

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.