



TURN UP THE POWER

Digitizing Operations to Improve Performance, Quality, and Compliance

It takes a lot of energy to run our world. Delivering those vital therms, Btus, and kW to businesses and consumers requires complex, expensive arrays of assets and equipment, as well as the ability to maintain all of it at top performance. Whether an organization is in the business of enabling access to oil and gas, or the generation and distribution of electrical power, the process can be complicated and costly.

These days, competition, regulation, and technology are fundamentally changing how energy and utilities businesses operate. As the stakes get higher, the pressure is on to do everything better and faster — while continuously reducing costs.

To compete and thrive in this dynamic business environment, business as usual just won't cut it. Energy and utilities leaders understand they need a digitization strategy that will see their organizations into the future. CEOs believe digital transformation will deliver sustainable cost reductions, enhance revenue growth, and support better decision-making.¹ Additionally, leaders in oil and gas agree that digitization is the difference between thriving, merely surviving, or just not making it.

According to Accenture Consulting, nearly 40% of oil and gas companies worry that they risk getting left behind their competitors if they do not continue to invest in digital.²

The benefits of digitization have been well examined and quantified. Those who have taken the leap are seeing significant benefits. For utilities in particular, digitization can reduce operating expenses up to 25% and drive performance gains of 20% to 40%, according to McKinsey & Company.³

Yet, despite digital's tremendous potential, energy and utilities organizations have been slow to adopt or fully implement digital initiatives. Meanwhile, the consequences of continuing to rely on disparate legacy systems and manual processes (paper forms, emails, phone calls, spreadsheets) negatively impact business — creating challenges with meeting goals for on-time performance, quality, and compliance.

1 <https://www2.deloitte.com/us/en/pages/energy-and-resources/articles/oil-and-gas-industry-outlook.html>

2 <https://www.accenture.com/us-en/insight-2017-upstream-oil-gas-digital-trends-survey>

3 <https://www.mckinsey.com/business-functions/digital-mckinsey/our-insights/accelerating-digital-transformations-a-playbook-for-utilities#0>



NEARLY 40% OF OIL AND GAS COMPANIES ARE WORRIED ABOUT THE RISK OF BEING LEFT BEHIND THEIR PEERS IF THEY DO NOT CONTINUE TO INVEST IN DIGITAL



DIGITIZATION CAN REDUCE OPERATING EXPENSES UP TO 25% AND DRIVE PERFORMANCE GAINS OF 20% TO 40%

COMPOUNDING CHALLENGES CAUSED BY MANUAL PROCESSES AND DISPARATE SYSTEMS

Manual paper processes and disparate systems used to support field, plant, and back office work are fraught with disadvantages — compounding the challenges to meeting on-time performance, quality, and compliance standards required in today’s competitive and highly regulated energy and utilities industry.

PROJECT DELAYS

Project delays often cost tens of thousands of dollars per day. Yet, manual, paper-based processes and disparate systems used for tracking field or plant work make it difficult to meet key performance indicators (KPIs) in a responsive, efficient, and uniform manner.

With manual processes and a multitude of legacy systems, employees in the back office spend countless hours searching through data or waiting for reports from the field or the plant. Lacking actionable, timely data to drive decision making, the ability to plan and schedule work, ensure the availability of equipment and materials, and quickly address and course-correct issues is greatly hindered. The result is setbacks and readjustments that lead to poor performance across the board.

COMPLIANCE IMPEDIMENTS

Safety, environmental, and other regulatory compliance is a top priority. Most energy and utilities organizations have well-intentioned protocols to document compliance issues. Yet, many of those processes are manual. Pen, paper, and clipboards are commonly used to capture observation data in the field or at the plant. Additionally, work orders must be requested via email or other



**UNDERPERFORMING
ORGANIZATIONS ARE 30% MORE
LIKELY THAN BEST-IN-CLASS TO
HAVE PAPER-BASED PROCESSES IN
PLACE FOR THE FIELD¹**
— ABERDEEN



**PROJECT DELAYS OFTEN COSTS
TENS OF THOUSANDS OF DOLLARS
PER DAY**

¹ http://v1.aberdeen.com/launch/report/research_report/11000-RR-mission-critical-mobility.asp

manual method to address violations, which might takes days or weeks to resolve.

In the back office, this data is then manually re-entered into a spreadsheet or other silo'd system. This type of rework is not only a drain on productivity, it's error-prone, impedes the ability to identify and get out in front of potential issues, and slows response time. Overall, this inefficient workflow increases exposure to non-compliance with real business impacts -- fines, higher insurance premiums, reputational damage, and more.

QUALITY ISSUES

For energy and utilities organizations to survive, quality is non-negotiable. Unfortunately, the typical workflow for ensuring that work is done accurately, corrections and adjustments are done quickly, and that equipment is in working order is managed with pen and paper. That data then must be keyed into various spreadsheets and systems through laborious data-entry, often after-hours.

According to a recent KPMG energy and utilities industry survey¹, 48% of companies rank quality as a top performance measure for projects. However, 47% of these companies say their project reporting involves separate systems that require manual reconciliation and updates.

Because of the many manual touch-points, this process is error-prone and results in a lack of visibility — hindering the ability to ensure quality measures are being met or addressed within a timely manner. The results of this include higher defect rates, rework costs, and potentially downtime.



OF COMPANIES THAT RANK QUALITY AS A TOP PERFORMANCE MEASURE, 47% SAY THEIR PROJECT REPORTING INVOLVES SEPARATE SYSTEMS THAT REQUIRE MANUAL RECONCILIATION AND UPDATES

— KPMG

¹ <https://assets.kpmg.com/content/dam/kpmg/xx/pdf/2017/10/global-construction-survey-make-it-or-break-it.pdf>

DIGITIZING MANUAL PROCESSES AND INTEGRATING SYSTEMS WITH EASE

TRACKVIA, THE LEADING WORKFLOW PLATFORM FOR OPERATIONS

Today, leading energy and utilities organizations are embracing web and mobile technologies such as TrackVia, a workflow platform for operations, to quickly and easily build custom, mobile-ready apps that digitize their manual processes and integrate with their disparate systems with little-to-no help from IT.

TrackVia is built to enable organizations to acquire, analyze, and act on data in an integrated, fluid manner. With TrackVia, energy and utilities organizations can quickly identify and take action on the challenges related to on-time performance, quality, and compliance.

IMPROVE ON-TIME PERFORMANCE

TrackVia helps energy and utilities organizations gain greater efficiency in collecting, analyzing, and sharing data between field and office stakeholders. This increases visibility and responsiveness to risks of delays as they arise. For example, with reporting based on real-time data, supervisors and managers can track the progress of work per employee or team in order to plan future work more accurately.

Coldwell Solar, a leading builder of solar power systems, digitized their entire operations for better visibility into projects, quicker approvals, and increased on-time performance. Approvals that once took two to three weeks with paper and spreadsheets now take two to three hours when managed with TrackVia. [Read the Coldwell Solar case study.](#)

IMPROVE COMPLIANCE

With TrackVia, workers in the field simply use their mobile phone to quickly document a safety or environmental hazard with a



FOR COLDWELL SOLAR, APPROVALS THAT ONCE TOOK 2-3 WEEKS WITH PAPER AND SPREADSHEETS, NOW TAKE 2-3 HOURS WHEN MANAGED WITH TRACKVIA

combination of notes, photos, and geolocation. Automatically, their entry triggers work orders to resolve the issue, which can then be included in reports that are viewable across the business — all in real-time.

This scenario and much more are the realities of TrackVia customers such as KS Industries (KSI), a single source service provider in the energy sector. With their custom-built TrackVia mobile app, KSI collects safety observation data in real-time at the job-site. Within six months of implementation, they reduced at-risk behavior up to 50%. They have also reduced safety incidents by improving the speed and accuracy of their safety operations. [Read the KSI case study.](#)

IMPROVE QUALITY

The reputation of quality lives forever. TrackVia helps improve quality through better integrity of data, visibility, and standardization across multiple locations.

Acquiring data with a custom workflow app rather than pen and paper reduces the chance of human error and improves the speed and accuracy of quality inspections. Additionally, the ability to view and analyze reports based on real-time data collected from the field speeds remediation actions.

For example, with TrackVia automatic triggers for maintenance work-orders can be sent to workers in the field to accelerate fixing incorrect, or work not done to code. Additionally, with their mobile devices, workers can view real-time reports that show whether or not work-orders have been completed. Taking it a step further, managers can set requirements for workers to attach pictures or signatures of completed work to the work-order certifying that the corrections were done.

With TrackVia, a leading energy and utilities services company improved the speed and accuracy of quality inspections through the collection of work quality data in real-time. They also cut their project rework rate in half. [Watch this firm's case study.](#)



“MOBILE TECHNOLOGY, WHICH ALLOWS THE FIELD TEAM TO TAP INTO KNOWLEDGE ACROSS THE ORGANIZATION, IS INTEGRAL TO SPEEDING [ISSUE] RESOLUTION.”²

– ABERDEEN



KSI, A SINGLE SOURCE SERVICE PROVIDER IN THE ENERGY SECTOR, REDUCED AT-RISK BEHAVIOR UP TO 50% WITHIN 6 MONTHS.



WITH TRACKVIA, AN ENERGY AND UTILITY ASSET MANAGEMENT AND SERVICES COMPANY CUT THEIR PROJECT REWORK RATE BY 50% AND IMPROVED THEIR BID WIN RATE

² http://v1.aberdeen.com/launch/report/research_report/11000-RR-mission-critical-mobility.asp

TRACKVIA: THE LEADING OPERATIONAL WORKFLOW PLATFORM

TrackVia is a fast, easy, and cost-effective way to power your business into the digital age. With little-to-no help from IT, you can integrate your systems, centralize your data, and digitize your complex processes involving employees in multiple locations. The time to digitize your operations is now.

GET STARTED WITH A CONVERSATION

How can TrackVia help you improve on-time performance, quality, and compliance? [Contact us today to get started.](#)



TrackVia is a workflow platform for operations that helps hundreds of companies like Leidos, Honeywell, and KS Industries build applications that improve on-time performance and reduce costs. TrackVia offers the fastest and easiest way to build powerful apps that are business led and IT approved.