Creating a Personalization Strategy

Track 9 – Session 2

Objectives

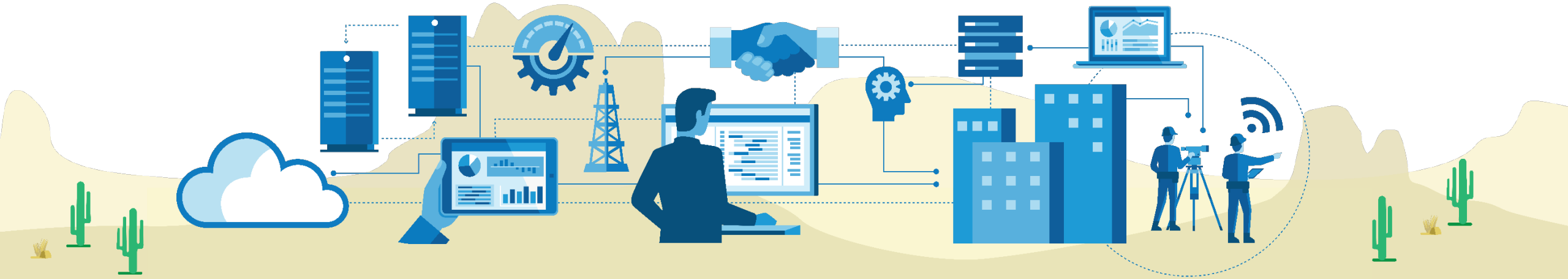
Identify and prioritize personalization opportunities within your organization

Understand myQuorum Design Studio
High-level overview of Design Studio toolkit

Learn a successful methodology for personalization
Approach for identifying opportunities where Design Studio can add value

Translate methodology to Design Studio use cases
Show how Design Studio can add real value to your organization

Design Studio Overview



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Powerful Web-Based & Developer Toolkits

myQuorum Design Studio Empowers You to Extend, Integrate & Build Innovative Solutions on the Open Standards-Based myQuorum Platform.

Your Company

Your Employees

Your Future

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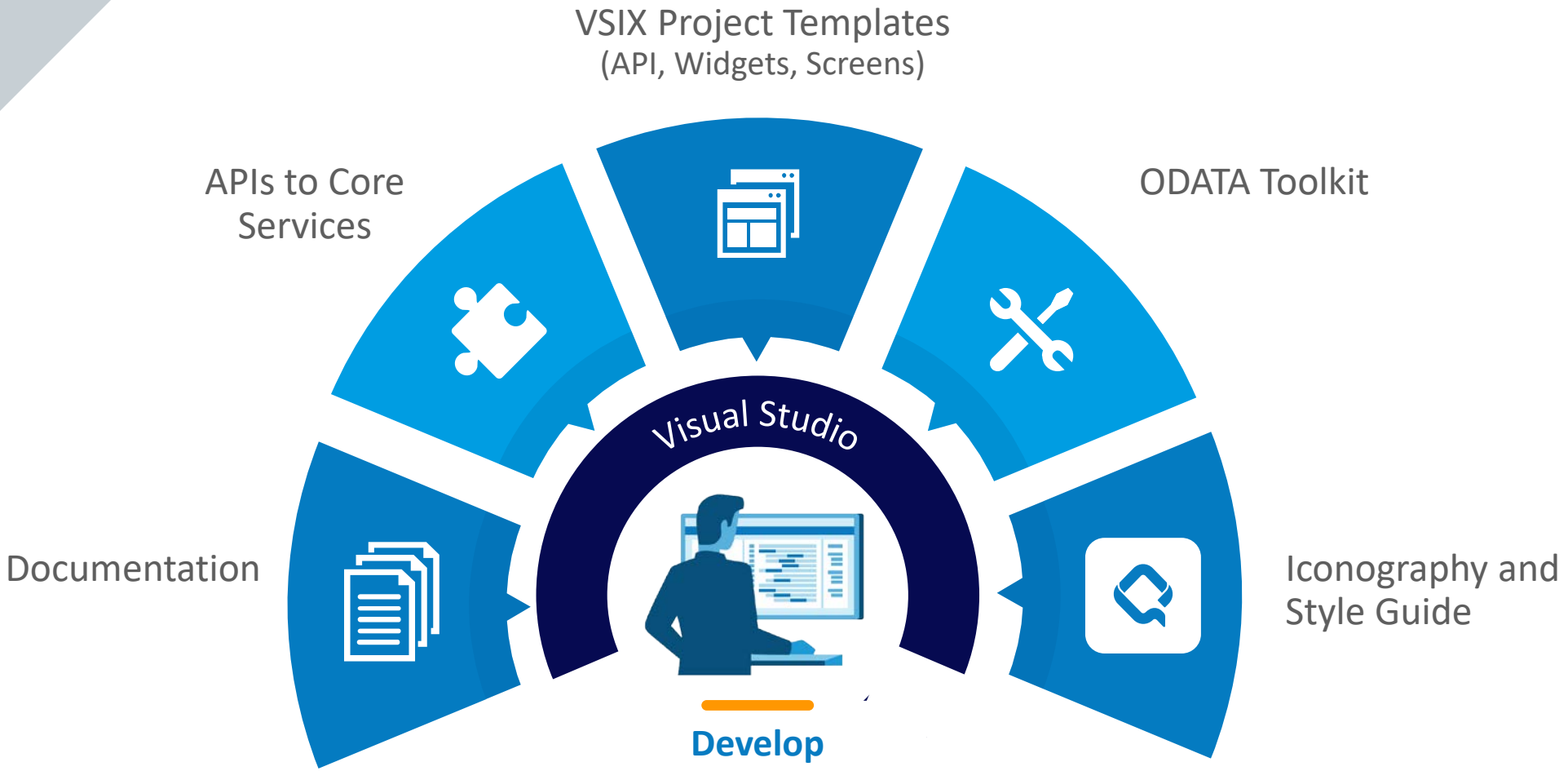
Powerful Software Development Toolkit



Build on and access data and services from your myQuorum Applications

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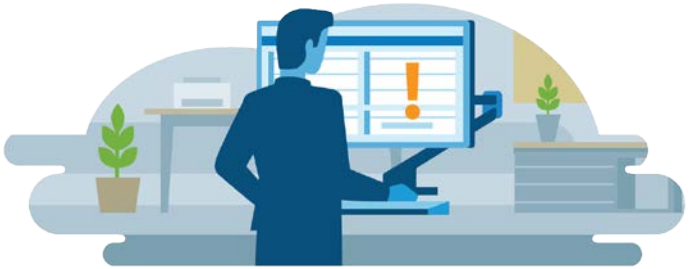
Business at the Speed of Innovation

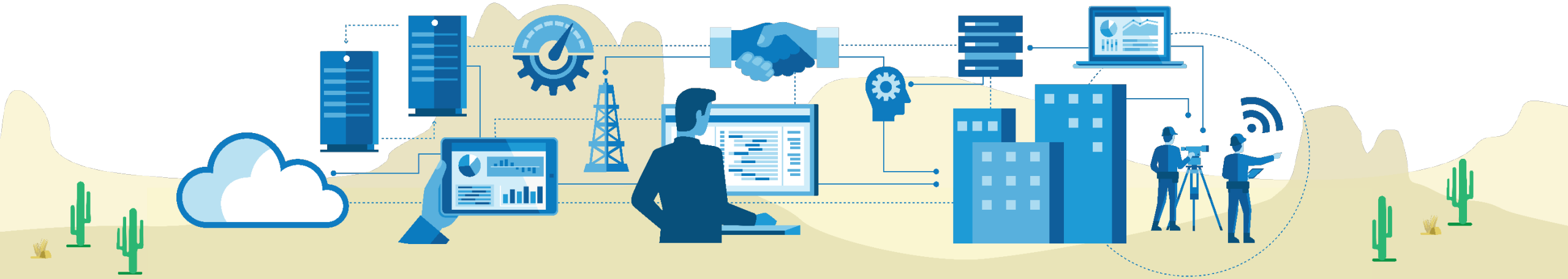
Capitalize on Unique Competitive Differentiators



Increase the Agility of Your Organization

Drive Maximum Value from Your Investment

Methodology for Personalization

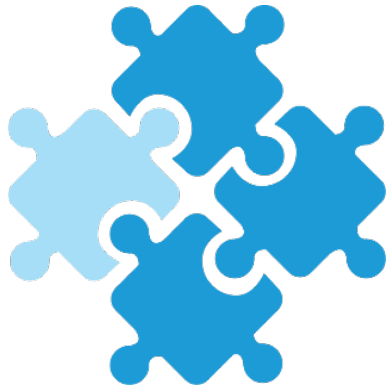


Creating a Personalization Strategy

1. Analyze existing business processes
2. Identify value-add use cases
3. Determine business critical data sets
4. Design, develop and deploy! (Session 3 @ 3:30 pm)

1) Analyze Business Processes

- Talk to the business users to identify pain points
- Map out “As Is” processes to look for improvement opportunities
  - Step-by-step mapping of current business processes
  - Include communication / coordination across groups
- Analyze output to look for things like:
  - Wasted time
  - Manual steps
  - Repetitive tasks
  - Silos across groups
  - Frequent errors / issues

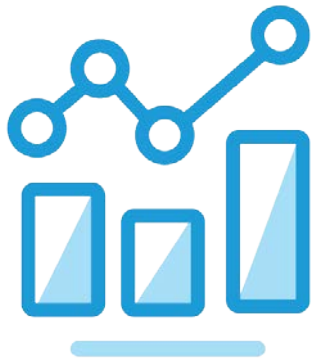


2) Identify Value-Add Use Cases

- Identify significant pain points that myQuorum Design Studio could address
- Determine places with maximum business impact
  - Generate more revenue
  - Eliminate risk
  - Streamline processes / improve efficiency
  - Automate repetitive tasks
  - Bring together disparate workflows
- Start with “low hanging fruit”

3) Determine business critical data sets

- Vast amounts of data – what information does the user need
  - Quorum apps
  - 3rd party apps
- Layered approach
  - Widget – Data to alert user that action is needed
  - Level 2 –Provides enough info for user to take action
- How should the data be organized?
- What data points should be emphasized?



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Design Personas that Empower Users

How can you enable users?

… simplify tasks

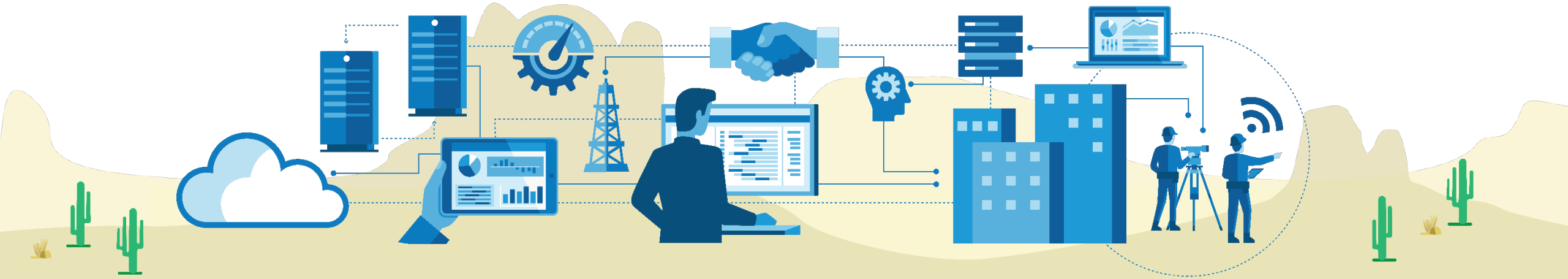
… eliminate poor decisions

… collaborate across departments

… adopt new software quickly

… streamline access to data

Design Studio Use Cases



Methodology Output Examples

1 Land Example: Lease Jeopardy Reporting

2 Pipeline Example: Commercial Dashboard

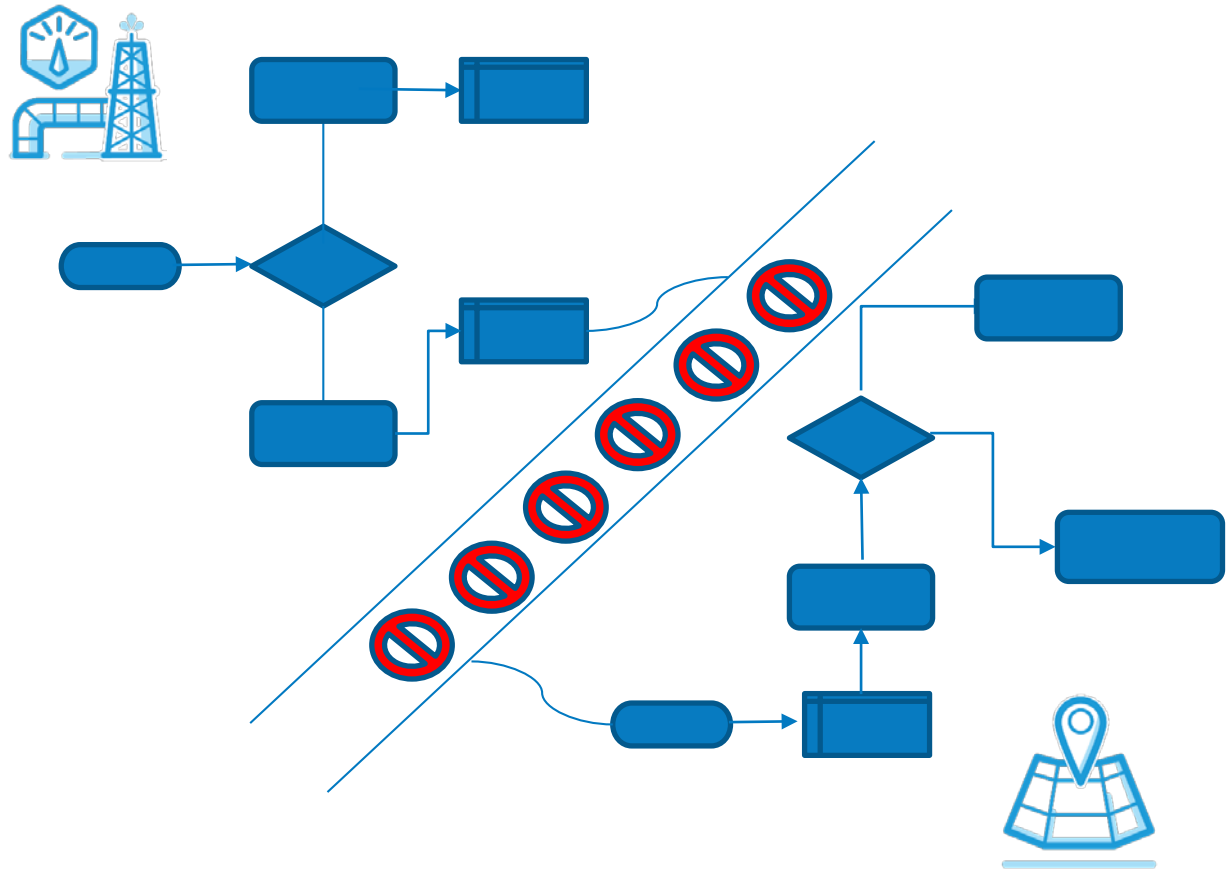
Methodology Output Examples

1 Land Example: Lease Jeopardy Reporting

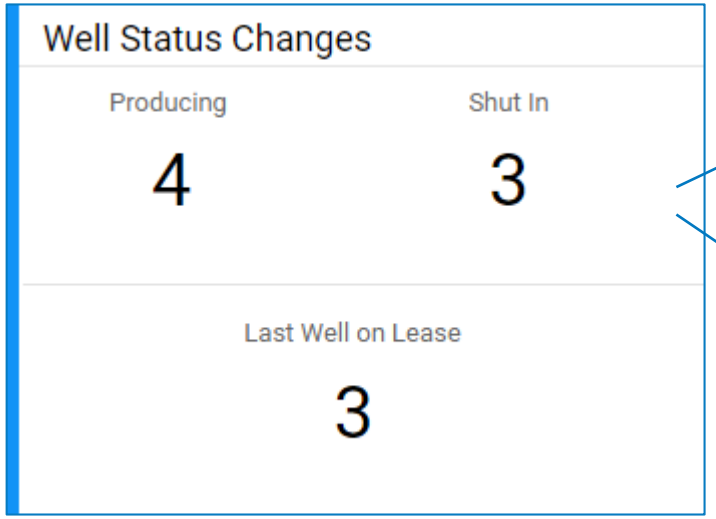
2 Pipeline Example: Commercial Dashboard

Lease Jeopardy Reporting

- Disparate workflows between Operations and Land groups
- Communication inconsistent and lagging
- Overall business process dependent on bridging gap
- Increased company risk



Lease Jeopardy Reporting



Well Name: Smith 1H

API Number:	County:	State:	Days well Shut-In:
123456789	Harris	Texas	3 Days

Well Name: Jones 1H

API #:	County:	State:	Days Well Shut-In:
987654321	Chambers	Texas	10 Days

Well Name: Williams 1H

API #:	County:	State:	Days Well Shut-In:
675849301	Chambers	Texas	10 Days

Well Name: Smith 1H

API Number:	County:	State:	Days well Shut-In:
123456789	Harris	Texas	3 Days

No	Lease Number	Gross Acres Effected	Net Acres Effected	Producing Wells	Shut-In Period	Per Well / Per Lease	Consecuitve / Aggregate	Previous Shut-ins Paid	Term	Payment Due	Estimated Payment
1	A Smith	20	20	None	90 Days	Lease	Consecutive	0	$100 per Net Mineral Acre	Yes	$2,00.00
2	B Smith	50	50	None	90 Days	Lease	Consecutive	0	$100 per Net Mineral Acre	Yes	$25,000.00
3	C Smith	100	100	None	90 Days	Lease	Consecutive	0	$100 per Net Mineral Acre	Yes	$50,000.00

1 - 1 of 1 items

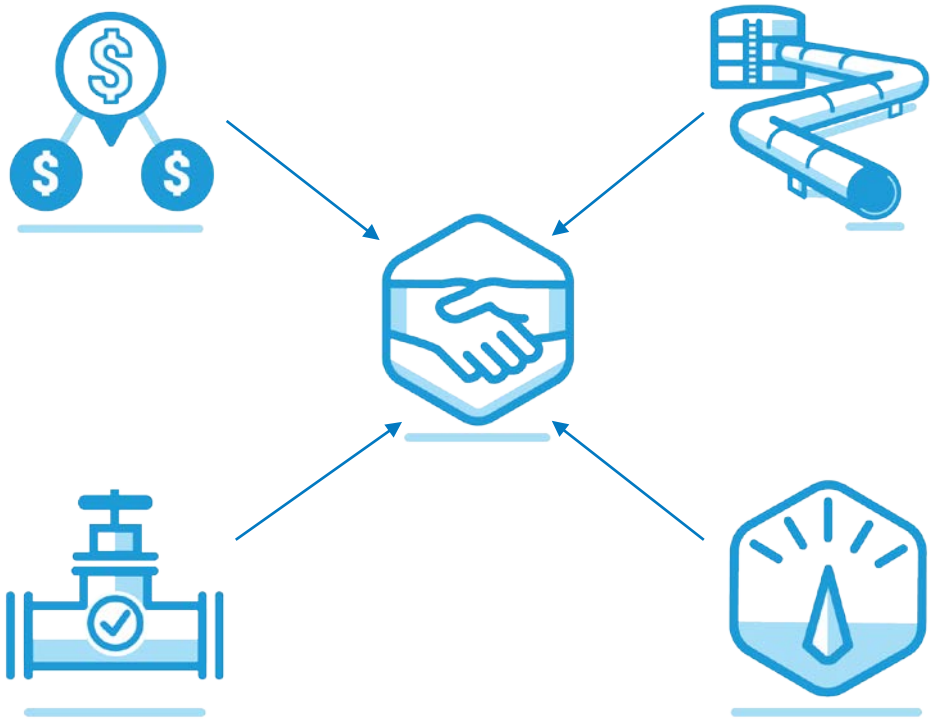
Methodology Output Examples

1 Land Example: Lease Jeopardy Reporting

2 Pipeline Example: Commercial Dashboard

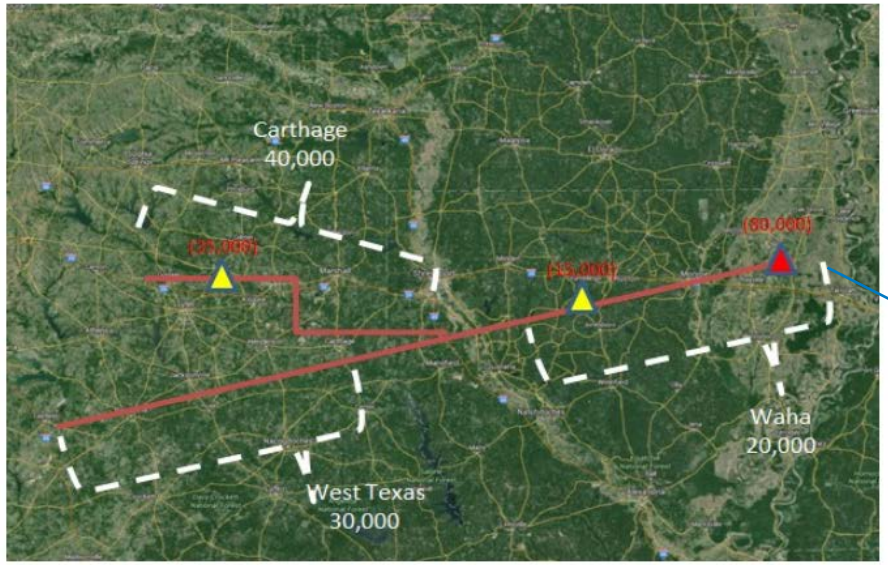
Commercial Dashboard

- Operations not fully integrated
- Coordination needed across multiple groups running pipeline
- Disparate data points
- Reactive to potential opportunities



Commercial Dashboard

Excess Capacity



	Location ID	Location Name	POV	Capacity Qty (DTH)	Net Flow (DTH)	Excess Capacity (DTH)	Actions
1	849	Montgomery	Receipt	120,000	40,000	80,000	⋮
2	820	Summit	Receipt	50,000	15,000	35,000	⋮
3	845	Atchison	Delivery	85,000	70,000	15,000	⋮

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Drive Improvements at Your Company

How can IT help?

… personalize solutions quickly

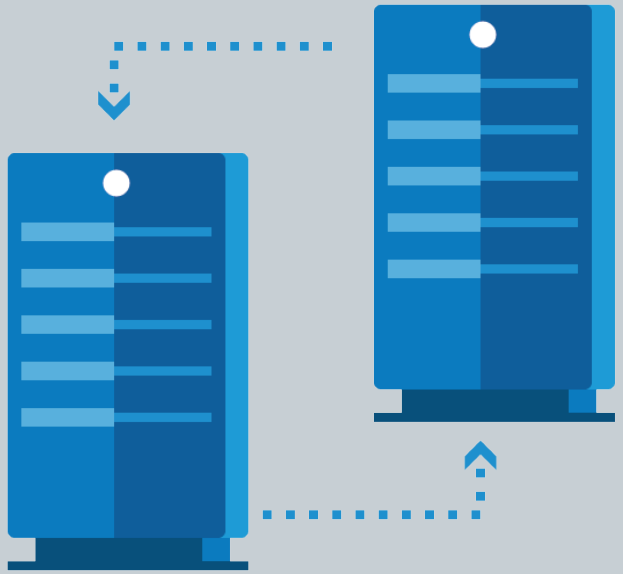
… streamline workflows

… integrate business processes

… enable collaboration

… adapt in real time

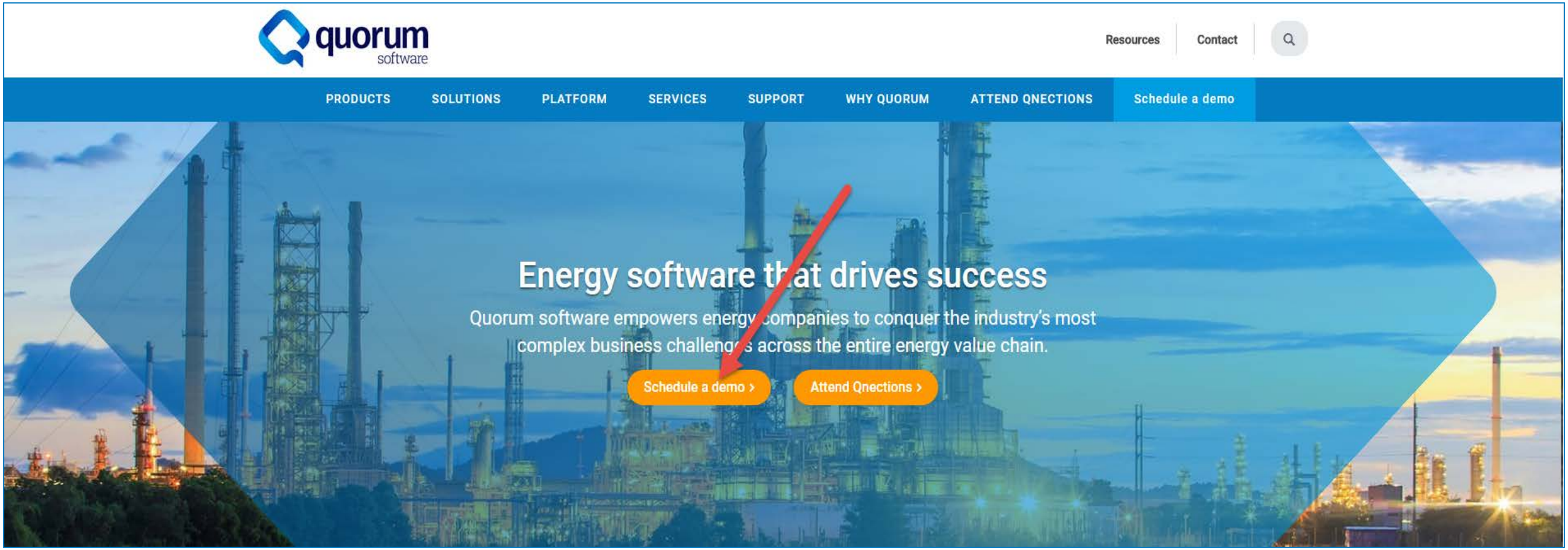
… **maximize** your ROI



Here to Help

- **Interested in licensing myQuorum Design Studio?**
- **Want a more in-depth myQuorum Design Studio demo?**
- **Need help creating your company's personalization strategy?**
- **Need help with development?**
- **Give us a buzz:** https://www.quorumsoftware.com/schedule-a-demo

Next Steps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Quorum software empowers energy companies to conquer the industry's most complex business challenges across the entire energy value chain.
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Thank You!

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