truecontext

Asset Inspection & Auditing

A global group of energy and petrochemical companies turned to TrueContext for assistance with challenges in field services management, specifically to streamline its asset inspection and audit process.

TRUECONTEXT.COM

- Better quality safety inspections
- Meeting compliance requirements
- Reduced site visits & repeat work
- Access to remote data in real-time
- Improved asset life cycle & fleet management
- Greater automation & efficiency

INEFFICIENT DATA CAPTURE

The company had a major problem capturing data in the field since inspections and audits were done via paper forms. The resulting information was put into spreadsheets and embedded into a master spreadsheet. The organization sought to refine its systems to improve the quality of captured data.

DIGITAL TRANSFORMATION GOALS

With digital transformation ambitions underway to reinvent the company's entire energy value chain to address upstream, midstream, and downstream challenges, it wanted to expand its capabilities to ensure worker safety and increase effectiveness. Predictive maintenance, proactive monitoring, and support for remote operations were several key areas of involvement.

The challenge

MACROECONOMIC PRESSURES

The pressures faced by the oil and gas industry pushed the company to realign costs and increase efficiency. To remain competitive, the organization needed assistance to help it work with reduced headcounts, optimize processes, and do more with fewer people and resources.

COMPLEX PROCESSES

In the oil and gas industry, inspecting and auditing various complex assets requires specialized equipment and trained technicians. Different protocols are in place for each asset, leaving a long trail of inspections, audits, and paperwork that is hard to track and rectify.

COMPLIANCE

Failure to follow the many compliance regulations throughout the company's supply chain, CSR, and HSSE programs could lead to severe penalties and threaten the organization. It needed to standardize and centralize these regulatory requirements into its process and manage compliance data and reporting with accuracy for transparency and accountability.

RISK OF FAILURE

To stay on top of its HSSE policy, the company needed a suitable process to minimize the likelihood and severity of safety or security incidents. It also sought to minimize total recordable case frequency and lost time injury frequency for employees and contractors.

The challenge

AGING WORKFORCE

The company needed its reliance on tribal knowledge of retiring experts and codify as much of this information as possible. At the same time, it sought the ability to train new field technicians quickly and effectively.

AGING INFRASTRUCTURE & ASSETS

Much of the company's equipment is big, expensive, complex, and aging. There are unique reliability concerns with aging assets backstopped by difficult repair and replacement decisions. Also, inspection and repair cycles get shorter as these assets age.

> *TrueContext has definitely allowed us to empower ourselves to automate a lot of our end-to-end processes and to turn to one tool instead of having Excel and Microsoft forms and different variations and platforms. We've integrated everything within TrueContext and it's really been successful.*

SERVICE OPERATIONS MANAGEMENT
GLOBAL GROUP OF ENERGY & PETROCHEMICAL COMPANIES

Outcomes

▶ **BETTER QUALITY SAFETY INSPECTIONS**

Removing paper from safety inspections has improved the quality of the company's data and evidence captured by sharing job site conditions. Digitization helps provide actionable insights to safety leadership through real-time analytics.

▶ **DIGITAL TRANSFORMATION**

TrueContext helped the company achieve its digital transformation and 'paperless operations' objectives at every stream. It has contributed to increased uptime across job sites with complex service of large extraction assets and ensures work is performed offline without missing a beat. With TrueContext, the company keeps pipes pumping and specialized trucks rolling with richer, deeper data that helps identify potential EHS risks before they occur. The company can now manage its complex refineries and large distribution operations with guided workflows and syncs data to its EAM system.

▶ **MEETING COMPLIANCE REQUIREMENTS**

With TrueContext's help, the company has incorporated all regulatory and safety standards in its field services business to comply with global, regional, and operation-level compliance requirements. Additionally, built-in TrueContext features, including digital signatures, location tracking, SOC 2 compliance, and pass-through handover, means the organization doesn't have to worry about information security requirements.

▶ **REDUCING SITE VISITS & REPEAT WORK**

With pre-site visit inspection forms, techs ensure everything is in order before performing an inspection or audit. They can access the previous inspection history and reports on pending work. The forms have business logic behind them, allowing field associates to finish work on the first visit.

▶ **ACCESS TO REMOTE DATA IN REAL-TIME**

With TrueContext, inspection and audit data is synced directly to the company's EAM and fleet management systems in real-time for proactive monitoring and support. Managers and supervisors can go to their internal server and EAP to automatically get real-time reports on field activity.

▶ **IMPROVED ASSET LIFE CYCLE & FLEET MANAGEMENT**

The asset team can predict when assets need to be replaced based on the analytics derived from TrueContext'ss granular inspection and audit results. The fleet management team has benefitted from a boost in efficiency. They can now track where each vehicle is, what it's carrying, where it's going, its status, and more.

▶ **AUTOMATION AND EFFICIENCY**

With many employees working in shifts, the company had to communicate over the phone, via email, or physically to handle changes and transfers. With TrueContext, technicians, especially those in training, can use the Dispatch feature to transfer tasks from one shift to another.

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