



**From data collection
to business action:**

Oxy's journey to frontline excellence

- Slashed duplicate data management work and hours of admin burden
- Access to real-time data on over 1.5 million assets
- Built-in compliance through logic-driven workflows
- Streamlined user provisioning for third-party contractors
- Accelerated form building through AI integration

About Occidental Petroleum

Occidental is an international energy company with assets primarily in the United States, the Middle East and North Africa. It is one of the largest oil and gas producers in the U.S., including a leading producer in the Permian and DJ basins, and offshore Gulf of America.



For Occidental Petroleum (Oxy), digitizing their field workflows was not just about collecting data but taking that data to its fullest potential. Leveraging TrueContext as its last-mile field app, Oxy deployed the platform's technician-focused UX, no-code scalability, and powerful system integrations to enable a truly digital approach to field service – allowing data to flow freely across the organization and empower technicians with everything they need in a mobile solution. Through hundreds of forms, thousands of frontline workers, and tens of thousands of submissions each month, the company services over a million global assets with transparency, safety, and operational efficiency in mind.

Data visibility for the front line and the C-suite

As field service continued to evolve into a data-intensive function within large organizations, Oxy faced two fundamental issues with its operations: being equipped to capture critical data as and when needed, and ensuring that data is accessible across the business so leaders of all stripes can extract its full value. A decade and a half ago, when mobile devices became ubiquitous, Oxy realized a new method of addressing inefficiencies in the service chain was on the horizon.

“Documenting on paper, turning it in, tracking and storing – it all seemed like such a waste of time,” Director of Field Technology Bob Summers recalled. “If we could do that in a digital form and then instantly have the results... that would be a very quick win,” he added. Oxy needed to revamp its field processes to take advantage of emerging technology like handheld devices and significantly reduce its reliance on paper.

However, being able to collect a tremendous amount of field data came with the inherent challenge of understanding what to do with that data afterward.

“Integration became a big lift. How are we going to actually integrate this data with SAP or Maximo at the time? How are we going to put this in a database for tracking purposes?” Bob explained. “We started with email, which meant that someone else had to track the email. Then we moved to CSR exports. That was one way to bring data in, but it was still not optimal. The logical progression to that was an API integration, so we could bring data into a database where we could work this as an enterprise system,” he added.

Oxy’s needs were clear: a digital platform – with a user-centric interface – that can directly ingest data as service is being delivered and seamlessly integrate with enterprise-grade systems of record.

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Leveraging integrations and advanced TrueContext capabilities

Bob's team worked closely with TrueContext to develop over a dozen use cases across Oxy's field operations, from maintenance inspections to BBS observations to quality assurance and employee recognition. The company's frontliners relied on built-in functionalities within the platform and app, including deep integration capabilities through data sources and destinations and API connections, rich and meta-data features like geolocation, OCR, and multi-media capture, and workflow and approval processes for a highly automated, modern service operation. The solution was deployed across 330 forms, almost 10,000 field technicians, through over 60,000 submissions every month.

For internal users, Oxy provisioned licenses through its own access management system via single sign-on. However, as a multi-territory operation that routinely relies on third-party service, the company also leveraged the platform's robust identity management system to bring contractors into the fold within TrueContext. This eliminated the need for separate Oxy identities for external providers,

reducing the resource cost of effectively managing system users and their respective access. Independent contractors were sandboxed within TrueContext, while all the data they captured from the field – along with the contextual information that they needed to deliver quality service – was fed into backend systems. This solution also significantly reduced risk in system security without any drawbacks.

In terms of maintaining regulatory compliance, Oxy effortlessly built specific guardrails within their workflows by using TrueContext form builder features to ensure transparency. With geolocation, for example, Bob's team could easily track work order documentation and verify that service was actually performed. "We put some fail-safes into the application, such as rules that you can't backdate a form. We limit when you can fill out job-specific forms. Another way that it's come in handy is discovering when technicians are filling out a day's worth of forms for one location. The product brought a lot of transparency and visibility into our day-to-day operations," Bob explained.



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Digitized processes, accelerated service success

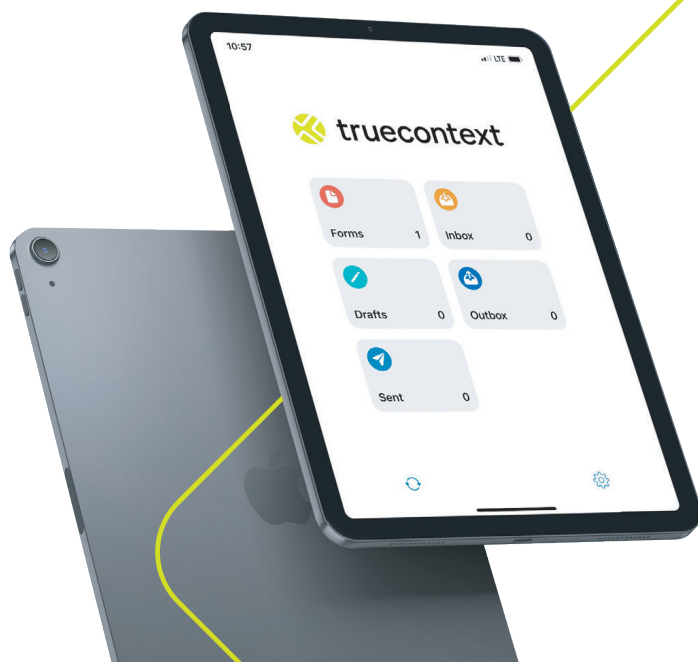
With TrueContext, Oxy has delivered a truly innovative solution to make its technicians' work a lot easier, resulting in an enabled workforce with improved performance, while also achieving broader operational goals such as improvements in compliance, data accuracy, transparency, and more consistent processes. The move from digital to paper alone has resulted in hours of administrative burden slashed, as data is only captured once in the field rather than processed multiple times across the service chain. Bob's field teams found a way to capture data effortlessly as work was being performed – and a way to make it count.

Real-time access to field data is critical, especially with the company's expansive equipment portfolio of about 1.5 million assets. "You can imagine having your entire company's equipment information available on your phone – millions and millions of records, all the way down to serial and model numbers," He noted. From the field leaders' perspective, they know the results of every completed job within minutes instead of several weeks to a month. Supervisors can go through BBS observations on a daily basis, gather the facts, and get ahead of things and adopt corrective measures if needed. They are also able to dispatch jobs directly to the crew based on this information, further automating work order management. Additionally, analytics capabilities are accessible so that anyone is free to perform analytics work focusing on different slices of the aggregate data contained within Oxy's enterprise system.

The collaborative process enabled by the no-code platform is also moving the needle in the workforce culture, where they collectively aspire to be more effective in everything they do. Frontliners are going all in on the solution as valued contributors. "People start to see that their work matters, and so they build the process with you," he further added.

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Future Outlook

Leveraging AI, OCR, and repeatable sections to dynamically build TrueContext forms, Oxy looks to further simplify form creation and management while accelerating deployment to the field. “Basically, we would use one document to fill thousands of maintenance documents – possibly north of 10,000 of them. It’s really slick, and it’s going to add a ton of value for us because we won’t have to manage or maintain all those documents separately. It’s exponential,” Bob said.

