



Cleargistix Increases Efficiency and Transparency for a Bureau Veritas Oil and Gas Division

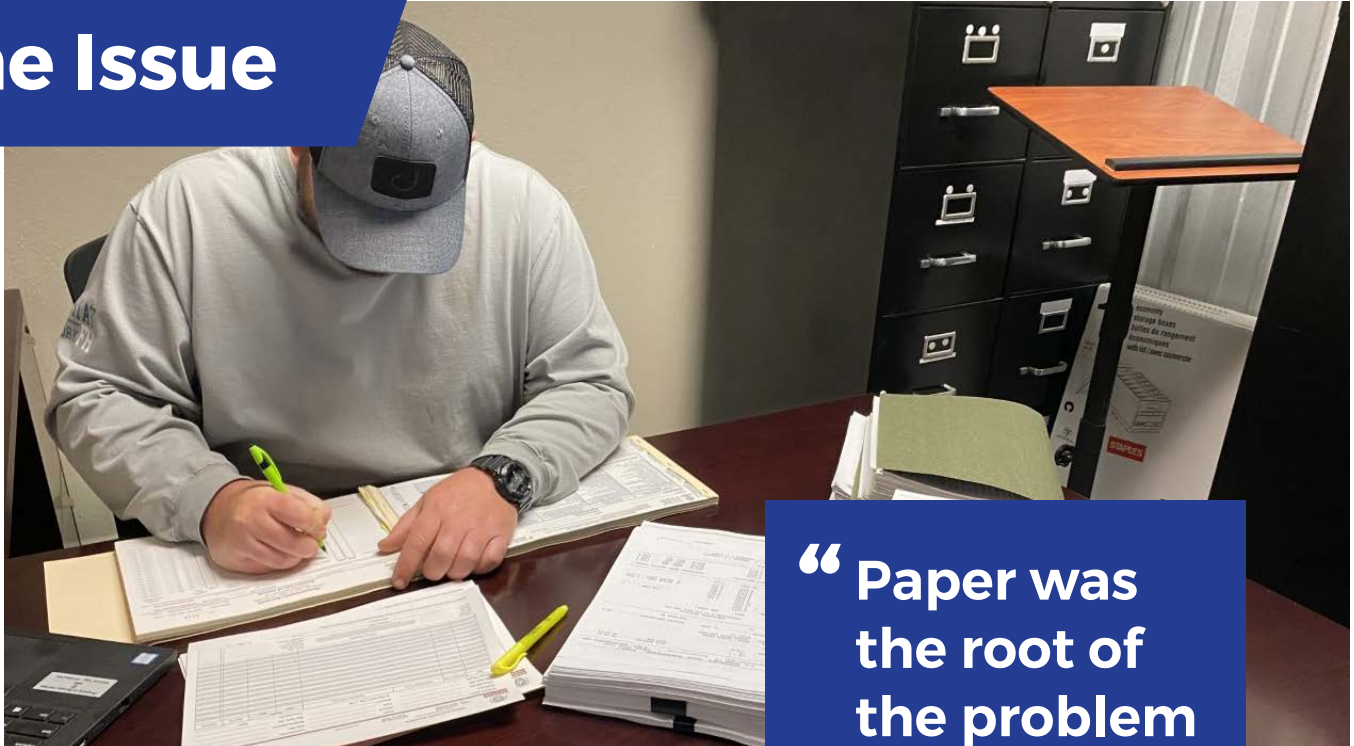


“We have reduced hours and errors, eliminated bottlenecks and decreased our “order-to-cash” cycle time. Operationally, we have timely insight into the performance of our technicians and scheduling, providing our customers with better service.”

For many oilfield service companies, getting the order and doing the work is the easy part—it’s why they are in business. Documenting and getting paid for the work, is much more of a challenge.

For the Oil and Gas Measurements division of the international testing, inspection and certification giant— Bureau Veritas, work ticket delays were having a financial impact due to inefficiencies associated with paper processing, cycle to pay delays and the increased potential for lost revenue. The manual work ticket processes required extra time from service technicians as well as office personnel. For Bureau Veritas, work tickets are not only vital for billing, they are necessary for tracking key performance indicators (KPIs) for employee efficiency, contract performance for Bureau Veritas’ services and cash flow performance.

The Issue



“Paper was the root of the problem”

Bureau Veritas Senior Director Kirsten Kennedy described the issue as follows: “We had a gap in our operational performance metrics which delayed our ability to respond and adjust operations and scheduling in a timely manner. Paper was the root of the problem.”

In the previous process, which was inherited through acquisition, work tickets were manually filled out by technicians on triplicate forms. Once the centralized back office team received the work tickets, they were priced out, delivered back to the customer for approval and signature, returned to the back office and then entered for invoicing.

This process exposed the business to cash flow irregularities and lost revenue. The lack of transparency and availability of data also limited Bureau Veritas’ ability to make field scheduling adjustments necessary for efficient performance.

“The paper process caused delays in the actual receipt of the tickets for processing as field technicians turned in tickets at a centralized location for entry, pricing, taxes, etc. Work

performed to ticket generation to invoicing could take up to three months in certain circumstances,” said Kennedy. Waiting for payment would often add another 60-90 days depending on customer approval of work tickets.

It is very likely that some tickets were lost completely, resulting in unrecoverable billing and in lost KPI data for the employee.



The Solution



Field Buy-In Was Critical

Choosing the right application was the first step. Field technician buy-in was foundational to the execution and overall adoption of the chosen application. Kennedy insisted on software that field technicians would actually use to digitally capture information in the field, could digitally manage the workflows related to the captured information and then be interfaced with operational, accounting and other systems, and it needed to be scalable.

"We reviewed multiple tools, internal and external," and, Kennedy said, most "promised the world" in the sales presentation. Bureau Veritas did not need "the world." They needed a flexible, configurable set of tools which was intuitive enough to speed buy-in from the field, including the toughest and most change-resistant field technicians. A system that was too broad, overly complicated or too detailed was likely to be overwhelming to those users.

The Decision

The first Cleargistix meeting was more of a "conversation based on reality" than a typical sales pitch, Kennedy recalled. "They said, 'We understand the challenges of implementation, and this is truly focused on user adoption.' There was a frankness in the portrayal of how challenging it can be to adopt new systems."

While most systems promised to do everything for everyone, Kennedy was more interested in software that would "stand on its own and export data to multiple systems as needed, but then, operationally, provide us the insights to help us run our own business." As part of a 77,000-employee multinational firm, the chosen software needed to meet Bureau Veritas' organizational needs, as well as feed its corporate accounting and financial systems.

Implementation

Bureau Veritas began its Cleargistix implementation in October of 2019 by loading existing contracts and other historical data. With that completed, and after training field technicians on the basics, they "hit the ground running" in Kennedy's words. "Upfront project management was minimal—it took only about two months before we were operational. It grew to comprehensive coverage within about four months [as of January 2020]". "Cleargistix swiftly delivered its digital field ticketing solution to Bureau Veritas Oil and Gas," said Kennedy.

The Results

Back Office

Ticket processing time is now a matter of hours instead of days or weeks, Kennedy reported. Tickets needing customer approval also speed through the Cleargistix process.

Cleargistix improved invoice processing to the extent that only three people are required instead of the previous six. “Our staff can be re-purposed and give back to the business. Cleargistix didn’t necessarily help us eliminate jobs, it offered growth opportunities to support our business operation in a more efficient manner,” said Kennedy.

“They’re not just pulling off a piece of paper from a triplicate form, scanning it and doing other routine tasks,” she said. “Now they are looking at trends and analyzing the state of the business. They’re separating the signal from the noise and helping our organization make better decisions, because we have current and correct data.

Timely performance evaluation data—KPIs—is one key feature of streamlining the ticketing/invoicing process, allowing immediate tracking of revenue per technician and other key data. Field technicians like this because it provides current information on their revenue generation for the month—and lets them compare notes. “It has really empowered the employees,” Kennedy said.

Cleargistix also gives Bureau Veritas more timely insight into its business, including tracking key information such as revenue per client and revenue per service. “We can respond proactively to changing schedules and Cleargistix also provides better insight into where staff may need additional training,” indicated Kennedy.



Administrative Assistant, Lauren Breaux and her southwest-Louisiana-based team are responsible for 800-1000 invoices a month from areas ranging across Texas and Louisiana. Her favorite aspect of Cleargistix is “that we don’t have to sit here and key all those invoices in any more. When we’re doing more than 800 invoices a month, keying in all those lines is a lot.”

Breaux reported buy-in from field technicians, which is the first step in eliminating manual invoice entry. Cleargistix has smoothed the tracking of invoices and alerts staff of potential missing information and highlights items that need to be verified for accuracy.

“We can go in, check the information, make sure it’s right and if it’s wrong we can contact the technician and ask them to recheck and make sure the data is right—and they can either fix it or tell us it’s right the way it is. Then we’re done.”

The Field

Louisiana-based Josh LaBauve has earned a reputation for forthrightness. He can be skeptical of change if it's just for the sake of change. Management was concerned about the overall acceptance of Cleargistix amongst the field technicians.

When he was introduced to the system his first comment was, "Why didn't we have this before?"

Getting tickets from technicians in remote locations is key for him. "I don't need to track down a technician to get his ticket, because he might be 30 miles offshore and I'm not going to buy a helicopter and go see him (for that ticket). Now I can see his ticket on the computer."

Because much of LaBauve's area is offshore, they previously used a cloud-based document storage system instead of paper tickets, but the system was unreliable, and it still required office personnel to hand-key the information into Bureau Veritas' systems.

With Cleargistix, "Right when I upload it, the lady in the office is there, she sees what I put in and she can take care of her business. There's no guesswork."

He can also track the ticket as it moves through the back office, which is especially important for months-long projects involving six and seven figure billing amounts.

Lead Measurements Technician Jeremy Kline is also pleased with the program, saying, "It's saved a lot of time" writing tickets. "Before, we were having to either hand-write or go through an Excel program and type every single thing in when we were in the field or we'd have to come back" and do the report at the end of the day.

Overall, "It's one of the best tools I've got with my guys."



With Cleargistix, "All you've got to do is type in the first two letters of the code number for the work you did and it populates the ticket. Then we add however many we did that day. So, if we did 30 meters that day, I input 30 and add the locations and I'm done."

The prior paper ticket system required a significant amount of time for personnel to manually research and reference part numbers. With Cleargistix, gone is the need to spend hours searching catalogues for part numbers—entering the first few digits of the part allows Cleargistix to insert the catalogue number from its database onto the ticket. When all entries are made, it instantly totals the charges.

"We install thousands of different parts, and we used to have to go through a book where everything was listed in alphabetical order. If I sold 15 parts in a day, that's an hour just looking for the part numbers. We don't have to do that anymore."

Typical work for him includes repairing and calibrating meters in the field, replacing parts as needed.

The fact that Cleargistix does not require internet service to work is another benefit, according to Kline.



Conclusion

Like many oilfield service companies, the use of paper work tickets at Bureau Veritas was leading to inefficiencies in their business processes and delaying payments by up to three months, and in some cases, losing the revenue altogether.

In Cleargistix's Digital Field Ticketing System, Bureau Veritas found a solution that delivered exactly what they needed to streamline field ticket workflow, create greater and more-timely visibility into field activities and speed client payments by several weeks. In addition, Cleargistix has helped Bureau Veritas eliminate lost and illegible tickets.

Cleargistix's flexibility, configurability and field usability sped employee buy-in at Bureau Veritas, allowing the company to quickly realize the system's benefits. Whereas company leadership had been concerned about reluctance to adopt the new technology, instead they received comments such as, "How did we ever get along without this?"

Now, instead of waiting six months to review the status of work flow and to evaluate employee KPI, all data is uploaded to Cleargistix daily, available for all reporting functions to everyone who needs it.

The transition from paper to digital is fast, quick, & easy with **Cleargistix**

Back office ticketing staff has been reduced from six to three, with the expectation of further reductions. Employees who were relieved of repetitive functions including keypunching can now utilize Cleargistix for accurate and timely data for analysis and planning.

"We have reduced hours and errors, eliminated bottlenecks and decreased our "order-to-cash" cycle time. Operationally, we have timely insight into the performance of our technicians and scheduling, providing our customers with better service," said Kennedy.

The Measurements Oil and Gas Division at Bureau Veritas is so pleased with the outcome; they will be working with other business units to see how Cleargistix can add value to their operations.



For more information, contact Cleargistix at info@cleargistix.com or 985-206-9544.