

OSIsoft Advanced Services: Business Transformation and Customer Success

Lance Fountaine
Principal Advisor, Business Transformation
OSIsoft, LLC
October 10, 2017



Introduction



Session Agenda

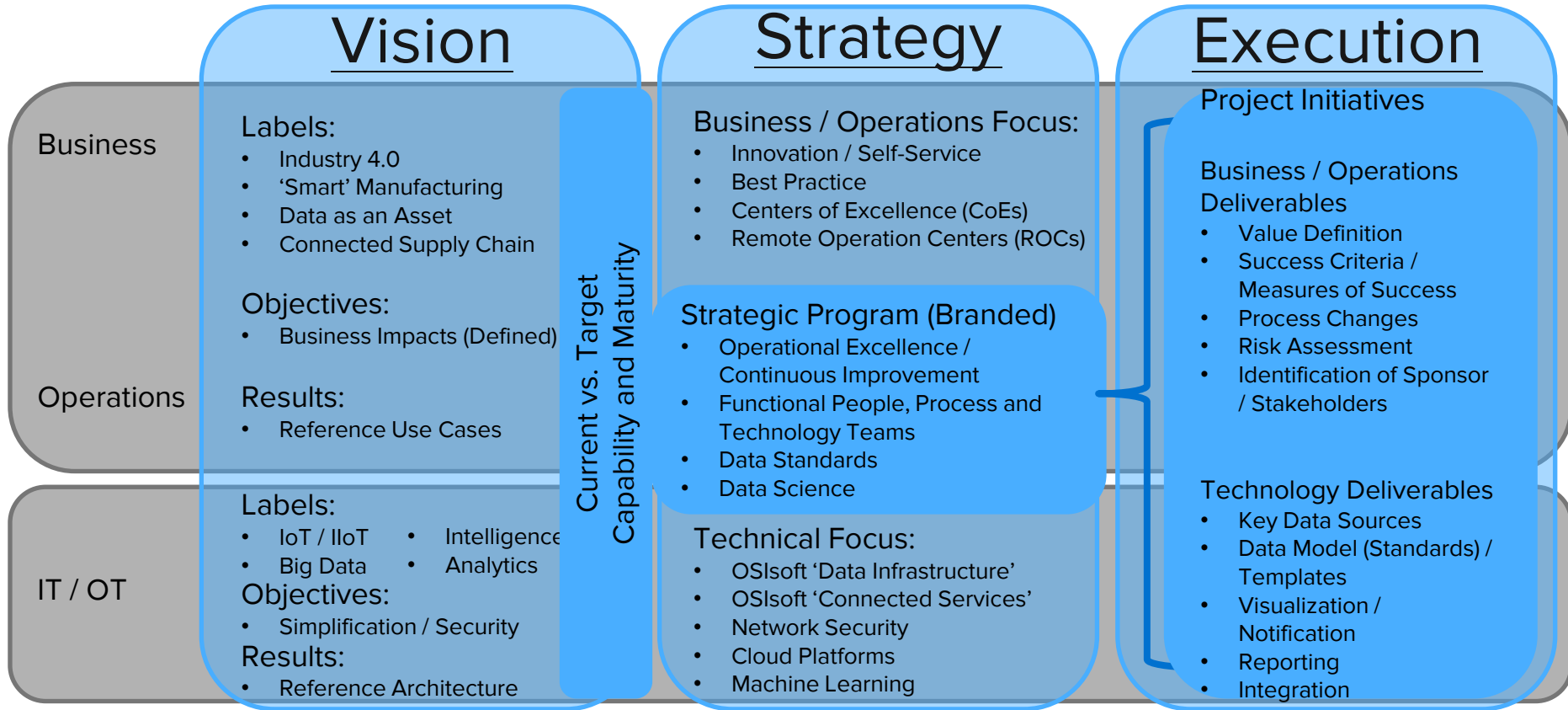
- Digital Transformation: An Introduction to the Customer Journey
- Understanding the Customer Journey
 - Vision Alignment
 - Building an Effective Strategy
 - Executing for Success
- Assisting in Your Journey: OSIsoft Business Transformation Services
 - Onboarding, Alignment, and Priority
 - Understanding Capability and Maturity
 - Developing the Target Condition
 - Documenting Your Strategy and Expected Results
 - Securing Organizational Support
- Assisting in Your Execution: OSIsoft Customer Success Services
 - Planning for Project Success
 - Assisting our Customers in Execution
- Conclusion: Key Takeaways
- Q&A



Digital Transformation: Understanding the Customer Journey



Digital Transformation: The Customer Perspective



Assisting in Your Journey: OSIsoft Business Transformation Services



OSIsoft BTS: Supporting Your Customer Journey

Business Discovery

- Align on 'Digital Transformation'
- Discover value opportunities
- Prioritize based on business objectives

Program Development

- Design and develop a technology architecture
- Design and develop a people engagement model
- Align with OpEx or CI processes

Business Justification

- Complete financial analysis
- Detail the costs associated with the established strategy
- Establish the business case justification





Identifying Your Initial (Priority) Value Opportunities



Understanding the Critical Business Objectives



Company Performance

Operating Portfolio

Key Strategies / Initiatives

- ***Insight to the Business Operating System (Operational Excellence)***
 - Often Company Branded
 - Defined KPIs
 - Targets
- ***Key Strategic Initiatives / Alignment with Business Impacts***
 - Productivity
 - Quality
 - Energy
 - Sustainability
- ***Key Decision Makers / Leadership Resources***
 - Operation Executives
 - IT Executives
 - Finance Executives



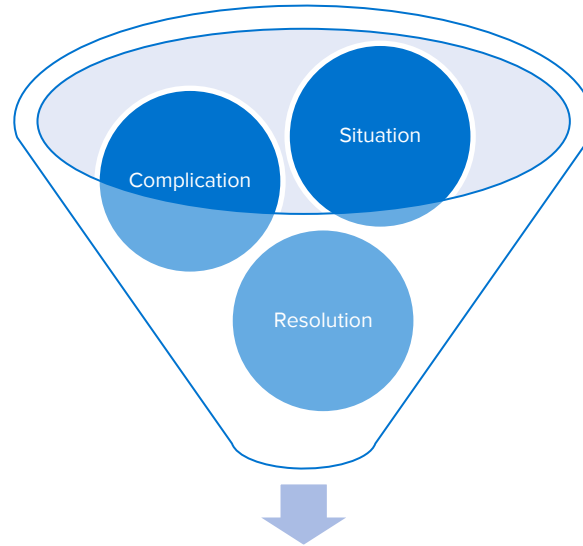
Business Discovery – What’s in it for ME!

Identifying Specific Opportunities

Organization Function (Who?)

	Executive Persona	High / Mid Level Manager Persona	Operational Level Persona
Production			Production Manager Process Engineer Production Supervisor
Maintenance / Engineering	Operations Executive <ul style="list-style-type: none">• COO• VP Operations• VP CoE		Maintenance Manager Maintenance / Reliability Engineer
Quality		Plant Manager	Quality Manager Quality Analyst
EHS	EHS Executive <ul style="list-style-type: none">• CSO / VP EHS	Business / Enterprise Resources	EHS Manager EHS Engineer
Finance	Finance Executive <ul style="list-style-type: none">• CFO• VP Finance		Plant Controller Financial Analyst
Procurement			Purchasing Manager Purchasing Agent
IT / OT	IT Executive <ul style="list-style-type: none">• CIO / VP of IT		IT Manager IT Analyst IT Tech Engineer

Aligning 'Digital Transformation' with Business Objectives



Safety &
Security

Energy
Utilization

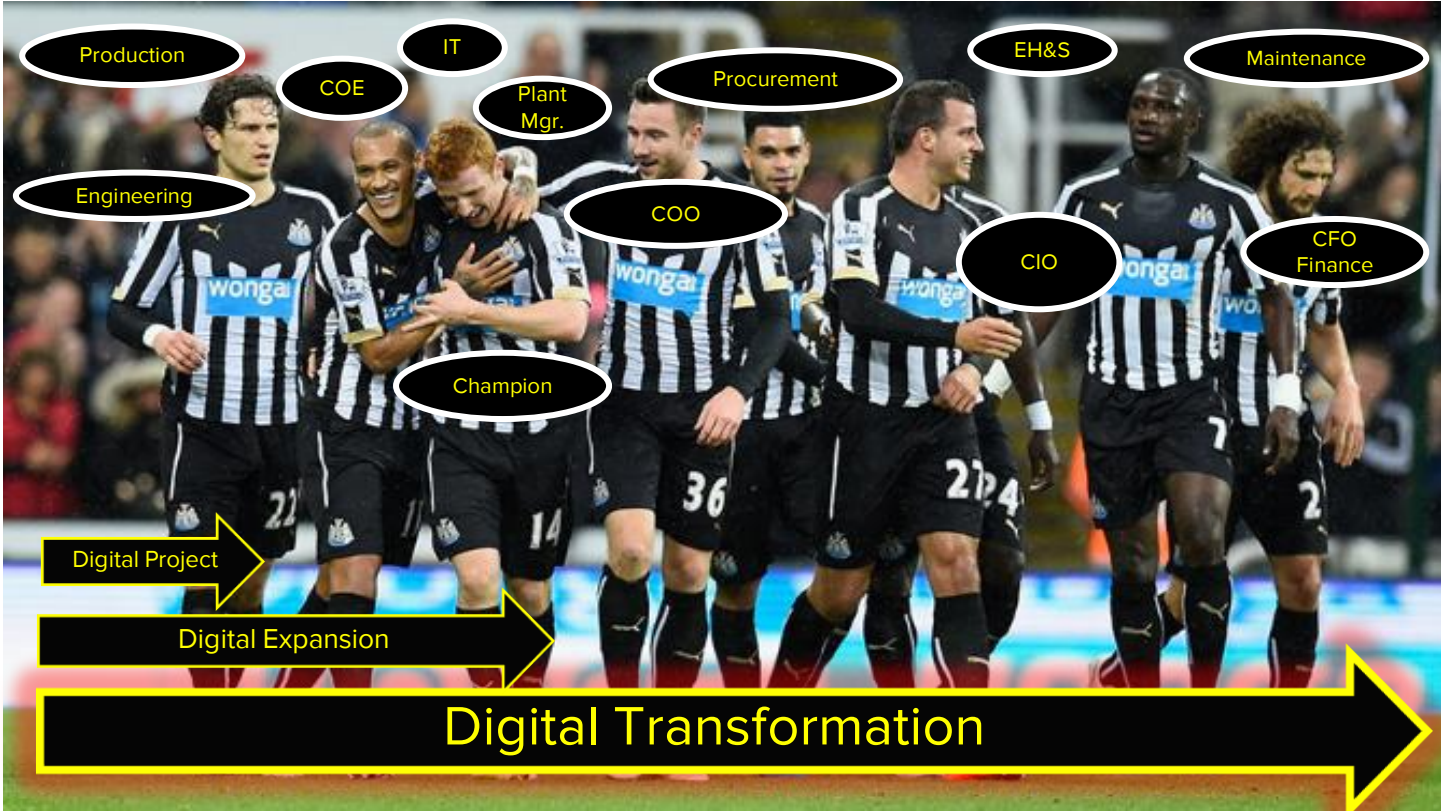
Process
Efficiency

Asset Health

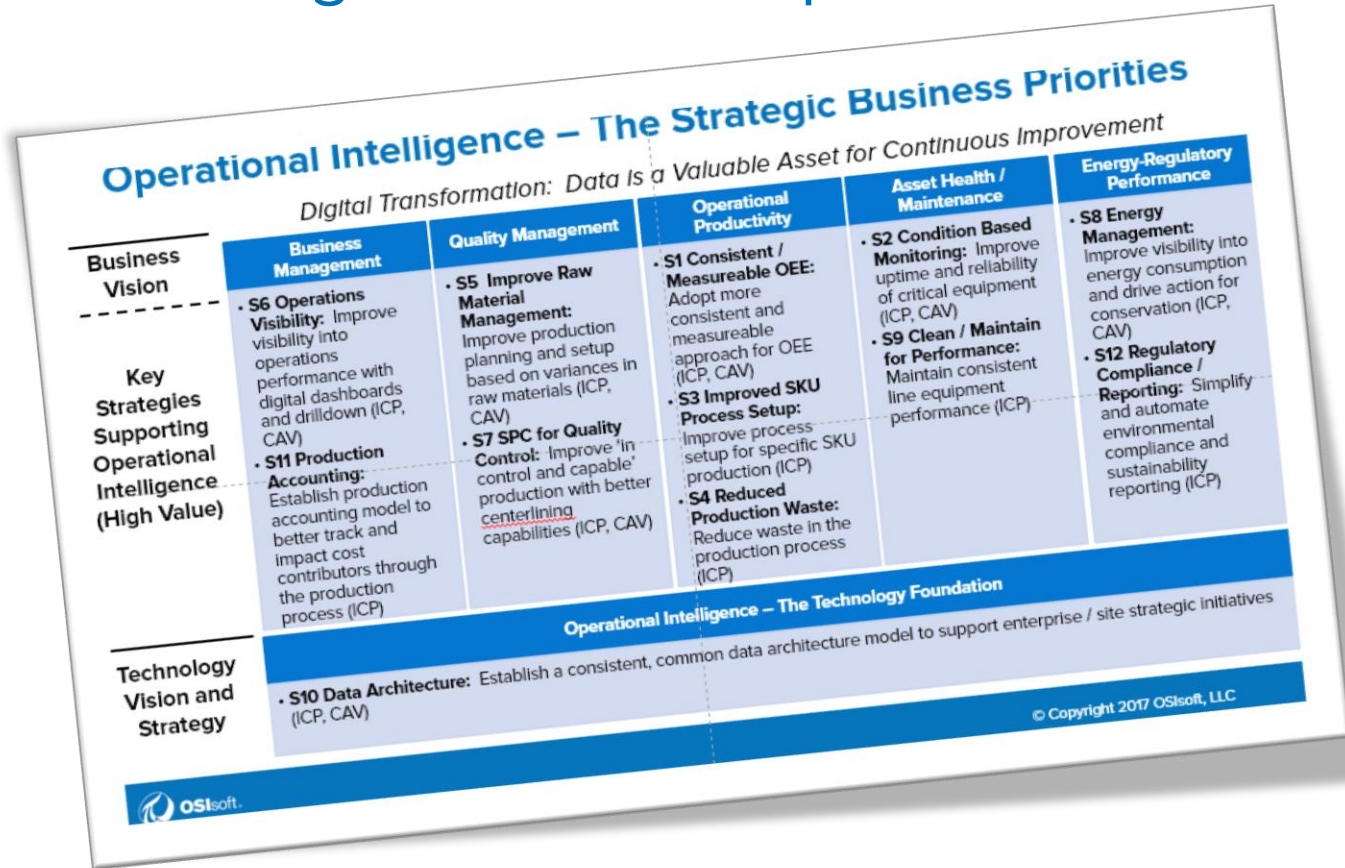
Quality

Regulatory
Performance





Organizational Alignment - Example

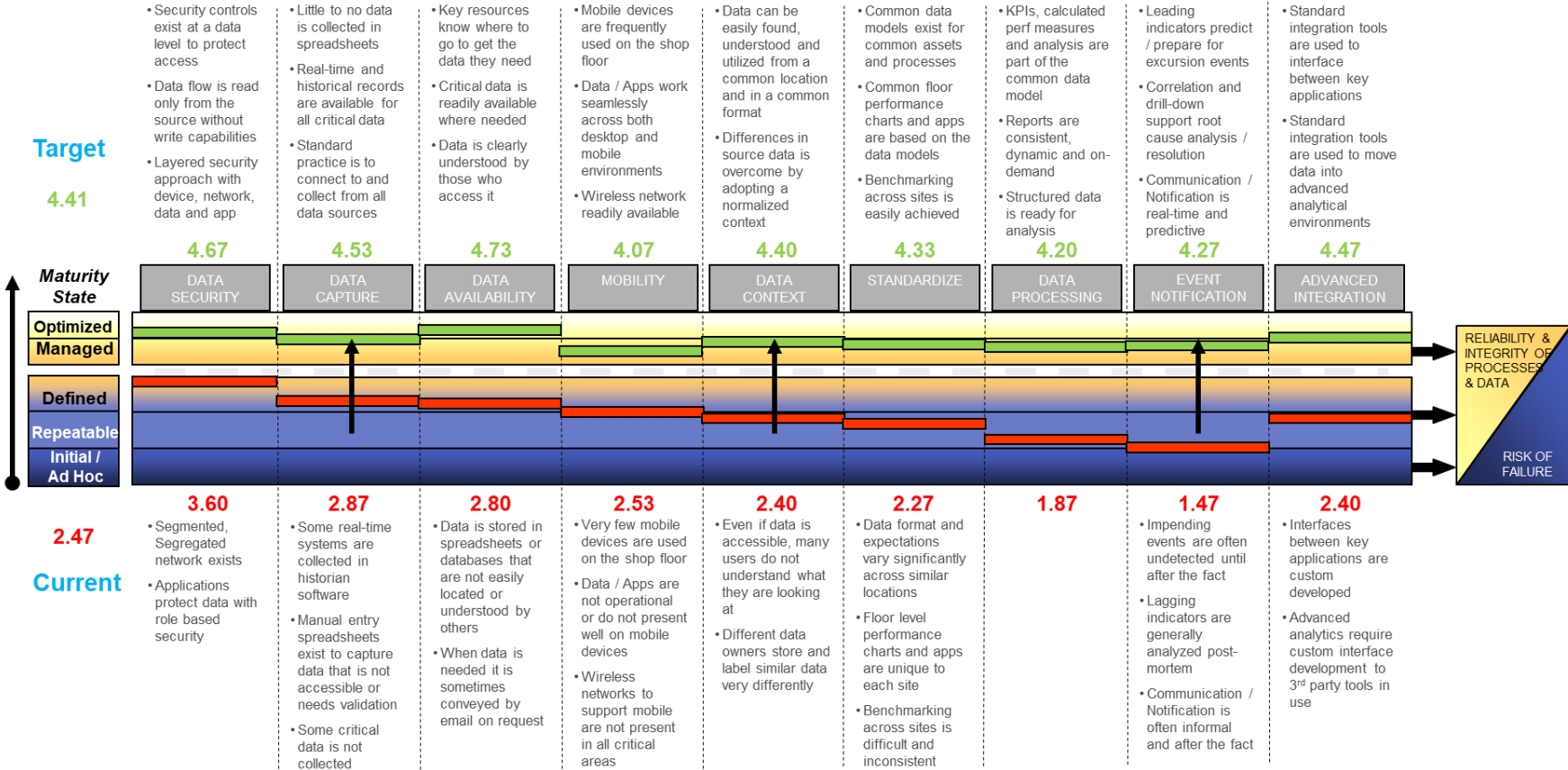




Understanding Your Gaps in Capability and Maturity



Achieving Success: Understanding Capability and Maturity

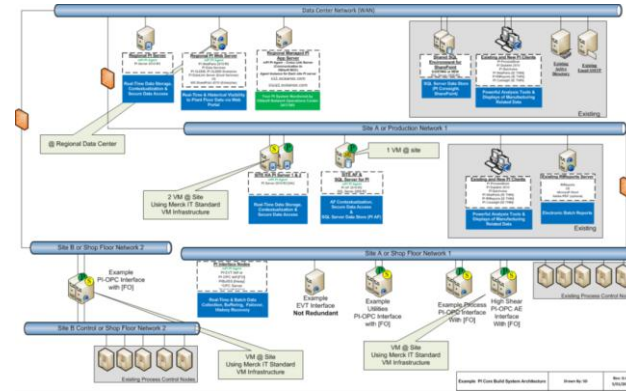




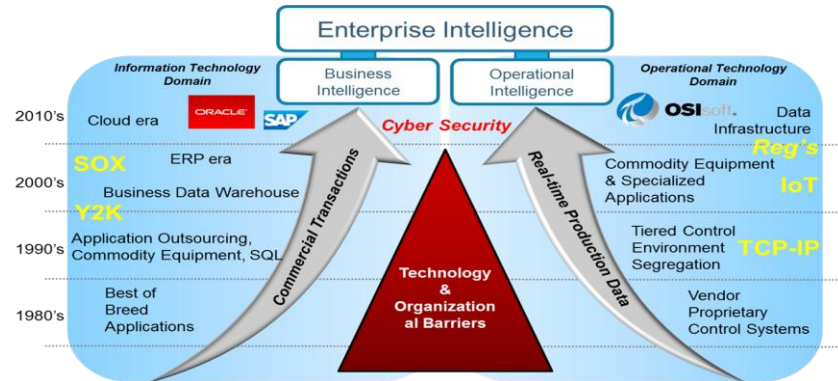
Defining the
Target
Condition:
People,
Process and
Technology

Capability Assessment: Current vs. Target for Technology Architecture and IT / OT Organization

Gaps in Your Technology Architecture



Gaps in Your IT / OT Organizational Effectiveness



Maturity Assessment: Current vs. Target for People / Process Practices and Technology in Use

Gaps in Your People / Process Practices

Gaps in Your Technology in Use (People)

✓ People Engagement & Best Practice

- With common data, talent across the globe will engage in **collective innovation** and the pursuit and sharing of best practices.
- The SMART architecture allows for the rapid deployment of 'Best Practices' through leverage of a common computing infrastructure

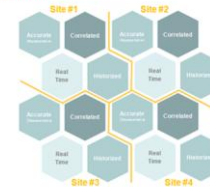


Who Derives the Benefit:

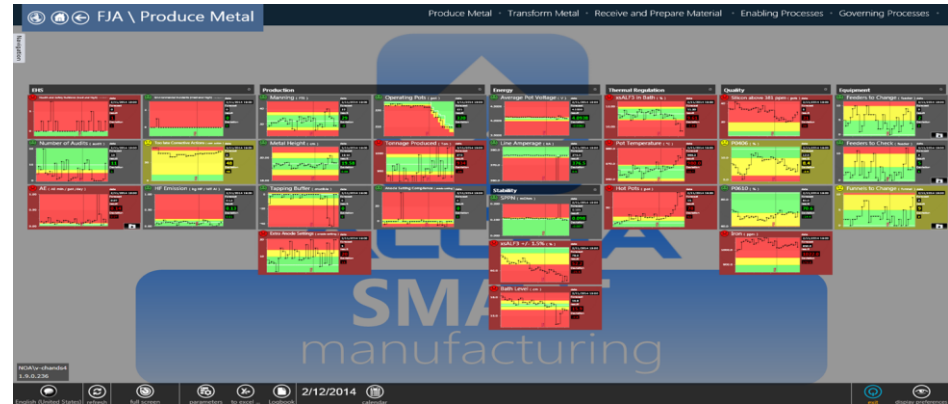
- Operators** leverage critical information when and where it is needed
- Process Engineers** develop ad-hoc analysis and 'Best Practice' process visualization standards to improve location production management and performance
- Supervisors and Area Managers** review real time KPI and have drill down capability for root cause analysis and problem resolution
- TiCoE Resources** leverage 'Best Practices' visualization standards across the business for 'Power of Comparison', root cause analysis and improved performance
- Business Leadership** is ensured of timely, accurate and consistent information for evaluating performance and driving decisions

✓ Process Measurement (KPI)

- Sharing a common language with other plants will allow us to truly realize Enterprise Advantage.
- A discovery in one plant can result in procedure, training, and policy changes in the other plants.
- SMART measures will become common measures. They will allow us to share best practices from one plant to another.
- Conventional manual data entry / transfers will be reduced.



✓ Continuous Improvement

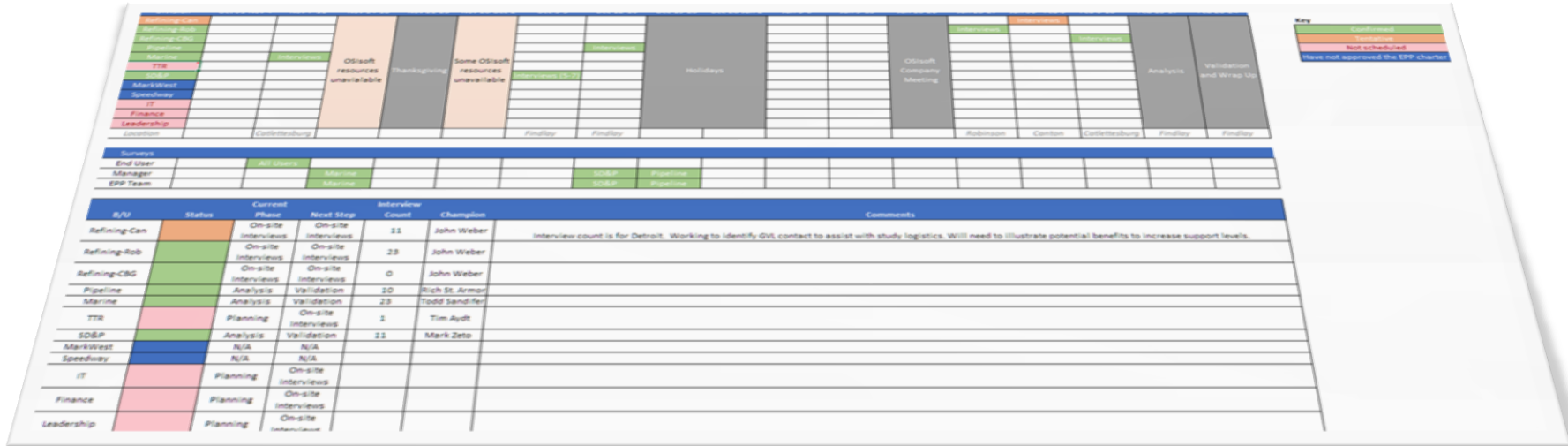




Documenting Your Strategy and Expected Results



Execution Plans for Prioritized Opportunities



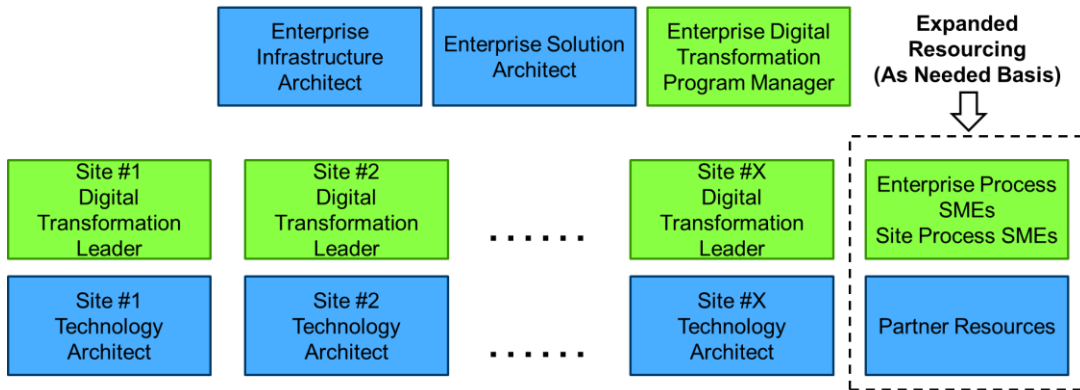
- a. High level documentation, provides general flow
- b. Highlights status, accomplishments, gaps, issues
- c. Follows defined PMO practices

Establishing Timeline and Resource Expectations

Expected Timeline for Technology Deployment and Delivery of Initial Priority Value Opportunities

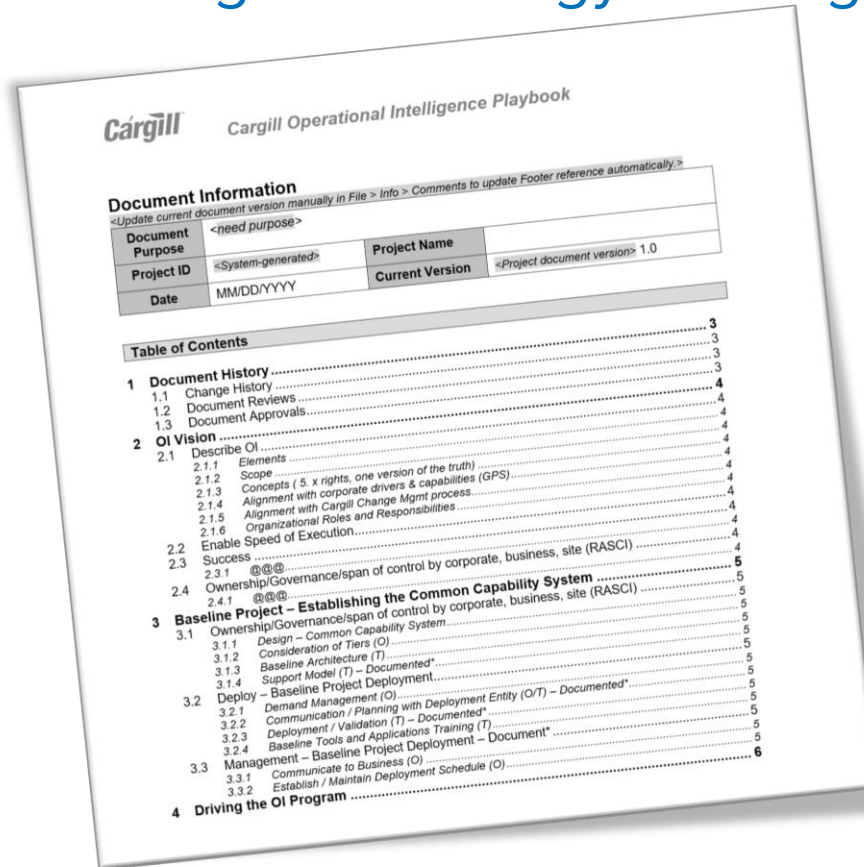
Project Name	Location Information Infrastructure Project Deployment																																																				
Project Life Cycle	Open																																																				
	2012																																																				
	1-Jan	8-Jan	15-Jan	22-Jan	29-Jan	5-Feb	12-Feb	19-Feb	26-Feb	4-Mar	11-Mar	18-Mar	25-Mar	1-Apr	8-Apr	15-Apr	22-Apr	29-Apr	6-May	13-May	20-May	27-May	3-Jun	10-Jun	17-Jun	24-Jun	1-Jul	8-Jul	15-Jul	22-Jul	29-Jul	5-Aug	12-Aug	19-Aug	26-Aug	2-Sep	9-Sep	16-Sep	23-Sep	30-Sep	7-Oct	14-Oct	21-Oct	28-Oct	4-Nov	11-Nov	18-Nov	25-Nov	2-Dec	9-Dec	16-Dec	23-Dec	30-Dec
Overall Project Progress	[Progress bars across the timeline grid]																																																				
Project Startup	[Timeline bar]																																																				
Network Infrastructure Deploy	[Timeline bar]																																																				
Information Infrastructure Design & Deploy	[Timeline bar]																																																				
Value Opportunity identification & Prioritization	[Timeline bar]																																																				
Realization - Value Opportunity #1	[Timeline bar]																																																				
Realization - Value Opportunity #2	[Timeline bar]																																																				
Realization - Value Opportunity #3	[Timeline bar]																																																				
Realization - Value Opportunity #4	[Timeline bar]																																																				
Realization - Value Opportunity #5	[Timeline bar]																																																				

Resourcing Model to Support Initial Deliverables and Ongoing Program



Documenting the Program Strategy for Ongoing Success

Cost Estimates should be based on this Program Strategy

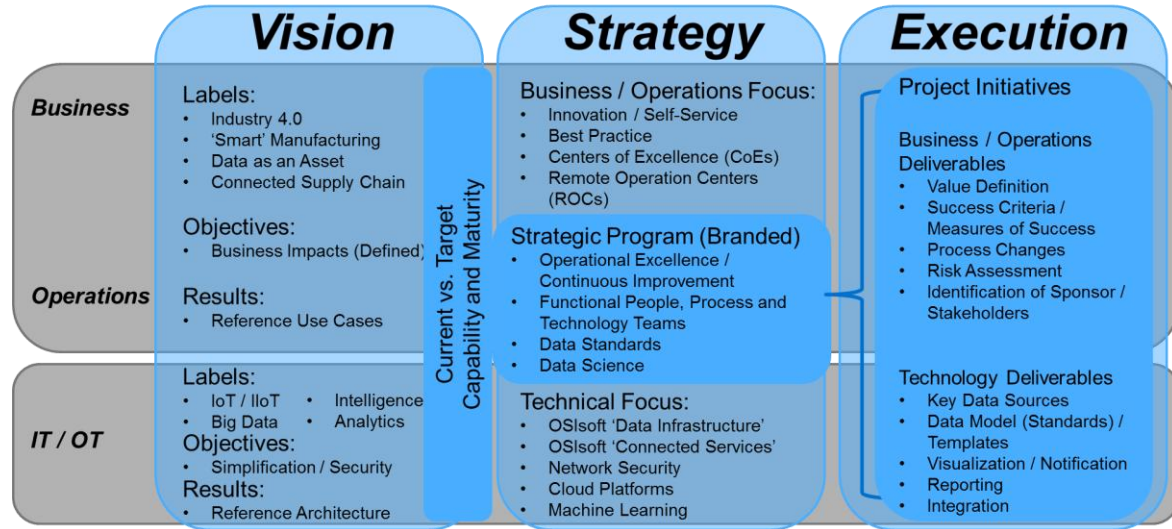




Securing Organizational Alignment and Support

Understanding the Opportunity vs. the Investment

- Value Lever**
- Business (\$) Justification
- Requires Executive Onboarding and Support
 - Business Case Likely Requires High Level Business Targets and / or Initial Project Financial Analysis
- Cost Lever**

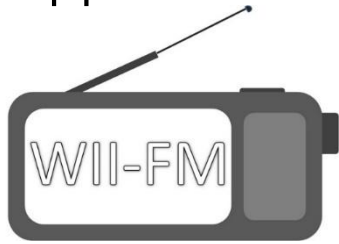


Garnering Support for an Initial Investment

Organizational
Alignment



Opportunities



Investment



Risk



Assisting in Your Journey: OSIsoft Customer Success Services



Assisting in Your Execution: OSIsoft Customer Success Services

Opportunity / Use Case Planning

- Assist in Project Planning
- Clarify Roles and Responsibilities
- Identify Success Criteria
- Design the PI Technology Solution

PI Project Team Supplement

- Remote / OnSite Resource Options
- Support Execution within the PI Technology Stack
- Works with Customer Operations and Technology Teams to Ensure Project Success

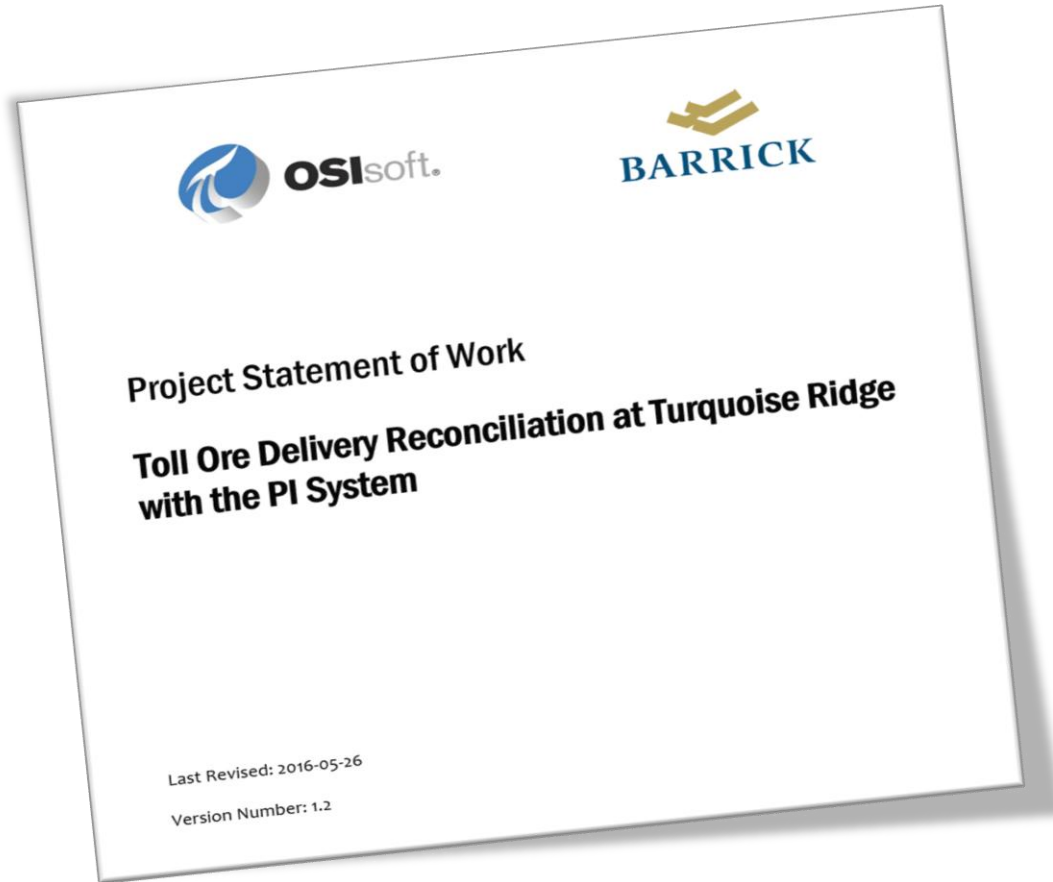




Planning for Project Success



Working with our Customers to Develop Plans for Success





Assisting our Customers in Execution



Streamlining Air Compliance Reporting with PI Asset Framework

COMPANY and GOAL

Barrick Goldstrike operates one of the largest Title V Air Permits in Nevada and needed a more efficient way to generate compliance reports.



CHALLENGE

Existing reporting framework was complex, redundant, and time-consuming

- Delays in data collection
- Difficult to track or make changes
- Numerous interdependent spreadsheets

SOLUTION

OSIsoft's Advisory Services Team and Customer Success engaged with Barrick to assist in the design and development to automate Air Permit reporting.

- Asset Framework and Asset Analytics
- PI System
- PI Datalink
- PI Notifications
- PI Vision
- PI System Explorer™

RESULTS

Centralized data and analytics allows decisions to be made with greater speed, precision, and productivity.

- Added real value to the company; able to analyze data
- Intermediate spreadsheets eliminated
- AF model returns the max or min hourly average



Conclusion: Key Takeaways



Key Takeaways

- I. 'Digital Transformation' Offers Tremendous Value Opportunity and Competitive Differentiation
- II. The 'Customer Journey' Requires a Comprehensive Strategy that is Aligned with Existing Company Objectives, Strategic Initiatives and Operating Practices
- III. Ongoing Success is Driven Incrementally through Continuous Improvement that Effectively Leverages People, Process and Technology
- IV. OSIsoft Can Help Support You on Your Journey with Business Transformation and Customer Success Services



Q&A



Thank You

Lance Fontaine

*Principal Advisor, Business
Transformation*

OSIsoft, LLC

lfontaine@osisoft.com



OSIsoft®