

Breaking the Paper Habit with IBM Maximo and Maximo Anywhere

Projetech Technology Solutions

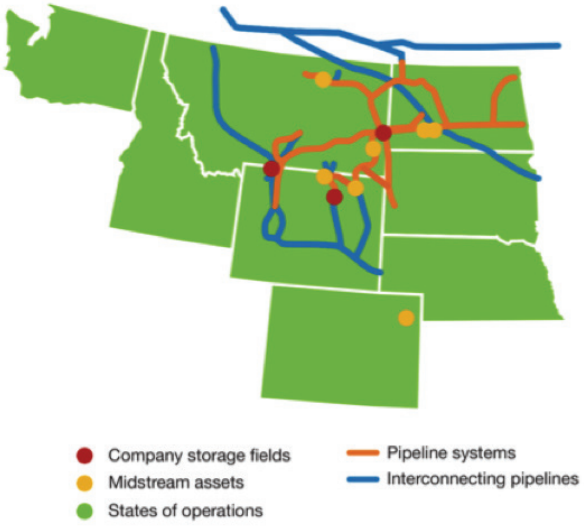
IBM Gold Business Partner

About WBI Energy

WBI Energy, a subsidiary of the MDU Resources Group, owns and operate more than 3800 miles of natural gas pipeline covering North Dakota, Montana, South Dakota, and Wyoming. With more than eight decades of energy-field experience in the Rocky Mountain Region, the experienced professionals at WBI Energy can provide a variety of energy field services to help you maximize your profit potential.

Other assets include three underground storage fields in Montana and Wyoming and a large volume of compressor stations – the pumps that supply the force to move the gas through the pipeline.

Maintaining these assets (and being able to prove they had done so) is key to meeting the compliance requirements set out by PHSMA (Pipeline Hazardous Materials Safety Administration). WBI Energy was struggling to achieve this using their current paper tracking system.



After a couple of compliance near-misses, WBI knew that had to make a change. By implementing IBM Maximo Oil & Gas and Maximo Anywhere, they have been able to take control of their compliance, improve their processes, and reduce daily manual tasks for their teams out in the field.

How Paper-Based Systems Put WBI At Risk

WBI's existing processes were primarily paper-based, with paper records extended to 30,000+ locations and their respective assets. Additionally, the teams never used work orders; the technicians in the field did what they needed and then sent the paperwork in.

Although the technicians were getting the work done to a high standard, tracking and proving it for compliance was becoming difficult and time-consuming. The team established several problems they wanted to correct:

1. Work Routines Were Based on 'Tribal Knowledge'

Current work and training relied on tribal knowledge; lots of older individuals knew the processes inside out, but it wasn't written down anywhere for newer employees. New hires could only learn from an established employee. By capturing and standardizing their work practices, WBI could improve their training of new employees.

2. Compliance Tracking Was Slow, Difficult, and Ineffective

With a paper-based system, compliance tracking involved manually pulling paper out of file cabinets. Often, by the time they were spotting problems, it was almost too late. WBI needed active, real-time tracking to ensure they didn't miss any key compliance dates or targets.

3. Close Calls for Compliance Violations Put Jobs at Risk

Despite the teams' best efforts, the paper-based system led to a couple of close calls for compliance violations. These had the potential to impact revenue by 10%, which may have resulted in letting staff go and a reduction in services. By automating their processes, WBI knew they could mitigate compliance risks and better protect the company and its employees.

4. Inefficient Paper Processes Held Back Future Growth

With their paper-based processes reaching the limit of their effectiveness, WBI knew that they needed a solid & reliable platform if they wanted to grow their business further.

Deploying IBM Maximo Oil & Gas and Maximo Anywhere In The Cloud

In addition to Maximo Oil & Gas, WBI required Maximo Anywhere so that they could deploy apps that would support their technicians in the field. Many of these technicians were maintaining assets far away from the office. Consequently, they needed to access their work orders and other resources from any location using just a phone, tablet, or laptop.

With a strong internal IT team, WBI could have opted to set up Maximo internally, but instead chose to use Maximo in the Cloud with Projetech.

This enabled them to:

- **Reduce Strain on Internal IT** – WBI's IT teams were already lean, so they didn't want to add another major application and the resources to support it. It was easier to benefit from Projetech's expertise in deployment and support.
- **Increase Speed of Deployment** – WBI set an aggressive schedule, aiming to deploy within one year. They would not have been able to meet that timeline if they kept the project entirely.
- **Meet Strict Security Requirements** – Having Maximo hosted externally meant WBI didn't have to worry about the strict security requirements they had to meet. Projetech handled security.
- **Focus on User Interactions, Not Software Updates** – By outsourcing the deployment and support, WBI's teams were able to better focus on using and configuring their system and training their staff.

Key to the success of the implementation was WBI's strategy of using cross-functional teams in focus tests and workshops to develop workflows and better understand the complexity of their business.

With vision and support from upper management, buy-in from area reps, IT teams, technicians, and project management, and deployment and support from Projetech, WBI was able to meet their deadline and have Maximo fully functional within one year.



How Maximo Has Helped WBI

Following implementation, WBI's key success has been building a foundation on Maximo which will allow them to further improve their efficiency and compliance in the future.

Specific benefits include:

- **Increased efficiency** – The reduction of paper and daily manual tasks for staff has released resources for tasks that add more value.
- **Structure** – Creating structured work practices using work orders has helped WBI move away from team members acting autonomously and has improved oversight.
- **Improved compliance** – Real-time proactive compliance visibility allows the team to gather data and immediately see where they are. The chances of further compliance scares have been considerably reduced.
- **Better decision** – Field technicians have access to the data they need to do their job better and are reciprocating by providing more feedback from the field. This helps WBI to allocate their resources better.

With this foundation in place, WBI is now focusing on further standardizing their work processes and refining PMs, routes & job plans. Future and in-progress plans include:

- **Tools management** - Establishing control of their tools inventory and ensure they are calibrated correctly
- **SCADA integration** – Realtime readings of temperatures, pressures, etc. integrated with Maximo
- **JDE integration** – Integrating ERP system with Maximo to ensure field technicians have access to warehousing/inventory and purchasing information.

Get Started with a Quote
www.projetech.com

ISO 27001 CERTIFIED
A-LIGN