

Case Study

**Fortune 500  
oil and gas  
business  
implements a  
game-changing  
enterprise search  
solution.**



## INDUSTRY

**Oil and Gas - Exploration and Production**

## COMPANY

**Fortune 500 Oil and Gas Company**

This business's strategy involves a differentiated approach to exploring and producing cost-advantaged hydrocarbons through innovation, technology, optimization, continuous improvement, and relentless focus on costs to deliver top-tier, long-term returns.

This Fortune 500 energy customer partnered with Upland BA Insight to save their employees time identifying and reviewing documents through search and preview. They are primarily engaged in the wholesale distribution of petroleum and petroleum products. They aim to be the premier exploration and production company, contributing to global progress by helping meet the world's energy needs.



# 20% of employee time was spent trying to locate existing information, and reinventing the wheel when they were unsuccessful.

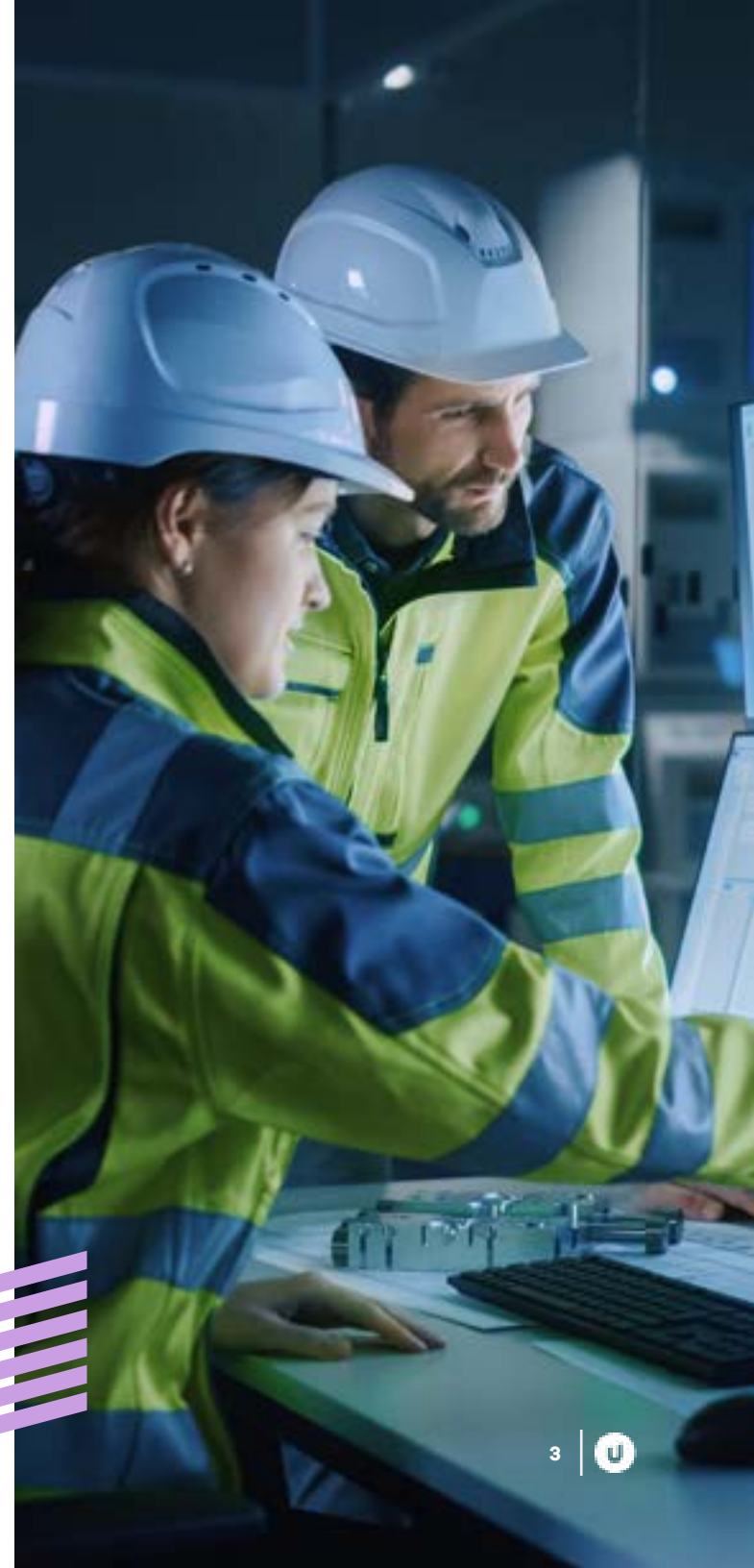
## **They had two distinct pain points they needed addressed.**

One of the big issues this company was facing was reduced employee productivity due to the inability to find critical information. Their employees were spending excessive time searching across the organization for information they needed to do their jobs. They had to search multiple systems to find critical business information, each with its own search interface and functionality. Through informal discussions, they estimated that more than 20% of an employee's time was lost searching for information or creating new items that already existed.

The other issue they faced was the creation of new documents based on collections of existing documents. To do this, the employees downloaded documents to their personal computers, opened each, searched for the correct page(s), and copied and pasted them to assemble new documents. Another challenge was that their distributed infrastructure was exacerbating the problem. Instead of one place to go, users had four different places to go based on their region.

## **They needed a centralized interface so employees could access information more efficiently.**

The vision that was agreed upon was to provide their knowledge workers with a single interface to access all necessary information independent of where it resides, all while honoring source system security. This meant aggregating content from their four regional search indices and indexing other external systems like FileNet and SQL server.



# They increased employee enterprise search usage by 75%.

## Their solution incorporated a combination of capabilities:

- SmartHub provides an integrated search interface, aggregating the four regional search systems into a single user interface.
- Connectors to FileNet and SQL server include additional key information and structured metadata within the index. Autoclassification to create and align metadata across the various systems and indexed data to ensure quality relevancy and results.
- Smart Previews allow search outside of and within documents, a workspace to collect documents, and aggregation of document parts to enable users to assemble the specific section of content needed to solve issues.

## Centralized search changed the game and increased productivity.

Employees have embraced the systems and now depend entirely on this solution, leading to an increase in the usage of enterprise search by 75%. A recent survey showed that users save hours per week through the speed and accuracy of identifying and reviewing documents through search and preview. The company continues to roll out additional feature capabilities, usability improvements and targeted departmental search solutions.

**Upland BA Insight** leverages AI technology to deliver a web-like advanced search experience with results that are relevant, personalized, and actionable. The connector-based technology works with enterprises, customer portals, and web sites, turning searches into actionable insights, regardless of where content or users reside.