Manufacturer Improves Content Management, Collaboration, Search-and Customer Satisfaction

Overview

Country or Region: United States
Industry: Manufacturing-Oil and Gas

Customer Profile
Exterran provides sales, operations, maintenance, fabrication, service, and equipment for oil and gas production, processing, and transportation. Based in Houston, Texas, it has more than 11,000 employees.

Business Situation
The company had a technology portal that was difficult and time-consuming to use, which hindered adoption by employees and created an impediment to the company's continued growth.

Solution
Exterran migrated its communications platform to a comprehensive collaboration solution powered by Microsoft® technologies, including a more usable enterprise portal, real-time Web conferencing, and security-enhanced instant messaging.

Benefits
• Boosts portal use
• Speeds document uploads
• Enables faster, richer, more accurate searches
• Supports customer requirements

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Kumar Mantripragada, Project Manager, Exterran

Exterran-a service and equipment provider to the oil and gas industries, formed from the merger of Hanover and Universal-had an enterprise portal, but employees shied away from it because it was difficult and time-consuming to use. This resistance affected global collaboration and was a potential roadblock to the company achieving its growth targets. To boost collaboration, Exterran worked with Infosys Technologies, a Microsoft® Global Systems Integration Alliance Partner, to create a more usable portal based on Microsoft Office SharePoint® Server 2007 and complemented with other Microsoft communications technologies. Employees find the new portal to be faster, easier, and more effective to use. Document uploads are faster, too, saving hours on major projects. Most important, Exterran's solution is helping it to win more business, expand its global reach, and build customer loyalty.

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Situation

Collaborating and sharing information with more than 6,000 employees throughout the world can be a considerable challenge for any company, and this was the challenge facing Hanover Compressor Company, a leading maker of equipment for the oil and gas industry. As a result of a 2007 merger with Universal Compression Holdings, another major oil and gas industry equipment manufacturer, the company now manages collaboration and information sharing among more than 11,000 employees.

The rapidly increased scale and the need to suddenly support vastly increased numbers of employees and customers could have been too much for the merged company, now called Exterran. But it wasn't. Exterran was ready.

A few years earlier, that wasn't the case. Hanover had adopted a portal solution for collaboration and information sharing running on a Linux system.

The intranet's user interface was unfamiliar to employees, making it difficult for them to use. Creating a site on the portal took at least two weeks, according to Kumar Mantripragada, Project Manager, Collaboration Program, Exterran. "Building a screen for the intranet was a big effort even for a developer," he says. "Business users couldn't do it themselves, so they had to wait for the Business Technology Department."

Setting up new workflow paths or other portal enhancements was also time-consuming; the development team didn't get to more than two or three such projects per month. Because the intranet design didn't integrate with the Windows Server® Active Directory® service that the company already used, employees needed a separate user name and password to log on to the portal. When they forgot those identifiers, it took at least a day or two to reestablish their credentials.

While the portal supported document sharing, it offered no "synchronous" or live communications such as Web meetings or instant messaging. Instead, employees either would travel halfway around the world to meet with colleagues and customers, or they'd set up conference calls and send documents using e-mail-with the result that some people might not receive the documents, so multiple versions of the documents would be created, and version-control problems would ensue. Even when the system worked, the e-mail system could get clogged with massive computer-aided design (CAD) drawings, at tens of megabytes per document.

No more than 200 Hanover employees-out of 6,000-adopted the

portal over three years, and those employees created only 20 sites. "Even before the merger, we had aggressive growth targets that depended on our being able to use technology to the fullest," says Stephen York, Vice President, Business Technology, Exterran. "But we weren't using technology as successfully as we should have been."

As the capabilities of collaboration technologies increased, so also did the expectations of the company's customers. For some customers, a portal through which they could communicate and collaborate in real time with the company-and in their native languages-was a requirement of doing business. Even when it wasn't required, York and his colleagues realized that lacking a state-of-the-art portal was hindering their ability to provide full service, especially in locations where they didn't have a physical presence.

Solution

"We did our due diligence to review the collaboration products on the market," says Mantripragada. "We realized that the Microsoft® technologies for collaboration did the best job of meeting our requirements."

Going for the Best Price/Performance Ratio and the Best Road Map
The company had another reason for choosing Microsoft. "We weren't a

Microsoft shop; we had only two enterprise solutions based on Microsoft technologies-Microsoft Exchange Server and Active Directory," says Mantripragada. "But we wanted to set up a Microsoft environment because we felt it offered the best price/performance ratio and the best road map for the future. This was our ideal opportunity to act towards implementing that move."

A visit to the Microsoft Technology Center in Austin, Texas, gave Hanover company executives the opportunity to see Microsoft collaboration products in action and to discuss the shape of a potential solution. The company decided to adopt Microsoft Office SharePoint® Server 2007 in August 2006, while the software was still in beta release.

Hanover worked with Infosys, a Microsoft Global Systems Integration Partner, to define user requirements and shape the portal solution. Infosys quickly prototyped new features requested by the company, often overnight, using a global team. Thanks to the software's built-in capabilities and Infosys' global delivery model, the project team worked across multiple time zones, reducing the time to review the prototypes.

During the development process, York visited Infosys in Bangalore, India, to get a first-hand view of the Microsoft technology and to refine the long-term

plans for the portal.

"Infosys was extremely helpful, and their participation both accelerated our adoption and helped to ensure a successful project," says Mantripragada.

The new portal went live in four months, shortly after the commercial release of Office SharePoint Server 2007. Infosys customized the look and functionality of the portal and provided deployment, configuration, training, and support services. In addition to providing users with a platform for collaboration, the project team deployed features available out of the box with SharePoint Server 2007, such as localized weather and links to other useful information, to encourage employees to return to the portal throughout their day.

Garnering Popular Support

To help demonstrate the value of the Office SharePoint Server technology and to build enthusiasm for the new portal, Stephen York presented the collaboration, content management, enterprise search, and integration features at a worldwide meeting of executives and managers held at the company's Houston headquarters in September 2006. "That's where the buzz about SharePoint started," says Mantripragada. "We demonstrated a range of technologies over three days, but the one thing that everyone took back from the meeting was 'SharePoint.' Our people immediately

wanted to put SharePoint Server to work."

One of those early adopters was the company's Legal Department, which was preparing for the merger of Hanover and Universal into what would become Exterran.

"I had to coordinate the gathering of two 18-wheelers' worth of information- thousands of documents-regarding the merger," recalls Brad Cannaday, Director of Compliance, Exterran. "Previously, we would have handled this massive information request using e-mail and shared disk drives, and it would have been unbelievably time consuming. After I gained some experience with a SharePoint site for sharing and distributing our policy documents, I saw it could be extremely valuable to us in responding to information requests regarding the merger."

Cannaday used the tools built into Office SharePoint Server to create the document libraries and folders that the Hanover merger team needed for information requests. The attorneys on his team gathered the information and uploaded it into the site. Everyone on the Hanover team was able to access the site in real time to see which documents had been acquired, eliminating the duplication of effort that Cannaday says would have accompanied the e-mail and shared disk drive approach.

Cannaday used the calendar function to chart interview schedules for his team and to track progress. He used the document-level security capability to give two of Hanover's outside attorneys access to specific folders and documents that they needed, effectively turning the site into an extranet.

"I was able to control access to the site down to the document level to ensure that our attorneys could access what they needed, whether they were employees or consultants," says Cannaday. "That was enormously helpful. Our outside attorneys said this was the most effective, organized information-gathering effort they'd seen."

The success of Office SharePoint Server in the merger effort, combined with its successful use for Eastern Hemisphere collaboration projects, helped build support for the technology at Exterran. One year after deployment, the portal includes more than 100 sites-five times the number built with the previous portal. Frequently used by employees around the world, the portal is the home page for every Exterran employee.

Enhancing Collaboration

With its new portal in place and in use, Exterran continues to advance its collaboration efforts. The Business Technology Department uses the Microsoft Office InfoPath® 2007 information-gathering program to collect and send data for internal audits. The Business Data Catalog capability in Office SharePoint Server makes it possible for employees anywhere in the world to search and retrieve inventory information from the Oracle ERP software without leaving the portal or needing to access the Oracle application directly.

The company has adopted the Microsoft Office Live Meeting hosted service to encourage real-time Web meetings among employees and customers around the globe, and it is preparing to adopt Microsoft Office Communications Server 2007 to offer security-enhanced instant messaging among colleagues anywhere in the world.

Benefits

Exterran finds that its people are making greater use of collaboration and search technologies, with the result that the company is more competitive and better able to support its customers.

Boosts Portal Use

Single sign on with the rest of the company's technology environment makes it easier for employees to access the portal, reducing help-desk requests for portal password resets. Familiarity with the Microsoft Office user interface also eliminated much of the training needed for the new portal.

"In contrast to our previous portal experience, Microsoft got our employees collaborating faster and easier-employee use of the portal improved significantly after the migration to Microsoft," says Mantripragada. "Users became self-reliant with the portal very quickly, both as consumers and providers of information. They love it."

"The SharePoint site interface appears as a user-friendly Web page rather than a complicated collection of folders on a shared network drive, the nested arrangement of which makes searching for specific data a long, tedious process," says Stephen L. Hood, Network Architect and SharePoint Administrator, Exterran. "With SharePoint document libraries and lists, a large collection of files and metadata can be presented in a single, well-organized view for quick access."

Not only that, documents upload to the SharePoint sites faster than they did to the previous site, according to Cannaday, which is a particular advantage when users need to upload large quantities of documents. "Given the nature of my work, uploading documents to the SharePoint site saves me hours compared to what I experienced before," he says.

Most significantly, department site managers can create and customize workflows, document libraries, and other aspects of the portal that

previously required intervention by Business Technology staff. This means that users have what they need much faster and can innovate on new products more quickly, and the Business Technology department is freed to focus on adding strategic value to the infrastructure.

Enables Faster, Richer, More Accurate Searches

Searching for information-especially information about people elsewhere in the company-is a faster, richer, and more accurate experience with Office SharePoint Server, according to Mantripragada. Because the portal is integrated with the Active Directory service, search information on Exterran personnel is as up-to-date as their Active Directory listings and includes employees' phone, e-mail, and other business contact information. Mantripragada and his colleagues say that SharePoint Server search results are more relevant and speedier than what users saw before.

"We're a very large company that doubled in size with the merger," says Mantripragada. "SharePoint Server gives us the ability to find colleagues anywhere in the world to provide the expertise we need to deliver for our customers."

Supports Customer Requirements, Helps Achieve Global Business Goals

Microsoft collaboration technologies are helping Exterran to better meet

customer needs-and thus, helping the company to reach its global business goals, according to York.

"Microsoft technologies are enabling us to expand our presence throughout the world, in places like the United Arab Emirates, Singapore, and Russia," says York. "We can instantly share information and work with customers in places where previously we'd have to spend hours or days to move information. The multilanguage capability in SharePoint Server makes it easy for us to offer portals in the native languages of our customers. All this means we do a better job of supporting our customers and building customer loyalty."

For example, York cites the company's growing business in Asia and the Middle East. Exterran's engineers at those project sites work closely with engineering colleagues in the United States, and the portal makes that collaboration possible. "Project management offices halfway around the world from each other have visibility into the same documents at the same time," says York. "They can access those documents and work together in virtual meetings as though they were in the same room. That's vitally important in furthering our ability to act as a single company with global reach. It enables us to work on bigger projects, to offer better solutions, and to accelerate innovation on new products, because we can

bring all appropriate resources to bear, regardless of where those resources are based."

Exterran also uses Office SharePoint Server to quickly set up project sites while in the proposal phase, before the company has won a customer's business. "We use the technology to show customers how we will collaborate and share information with them if we get their business-and that helps us to win that business. We've had so many positive comments from our customers about the Microsoft technologies that we know they're a clear contributor to our growth."

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