

intricate

UPSTREAM OIL & GAS GUIDE

Switching software without disrupting operations

A Practical guide to reducing risk and finding the right starting point

For many upstream oil and gas operators, the challenge is not finding better software. It is the uncertainty that comes with changing it.

The transition does not have to mean replacing everything at once. By identifying the greatest operational friction, understanding what needs to change, and starting with a manageable first step, operators can reduce risk, demonstrate value, and expand when it makes sense.

Why software changes get postponed

Changing software affects people, processes, data and existing systems. Even when teams are frustrated with the current environment, they know how it works. Its shortcomings are familiar, change introduces unknowns.

That creates a common internal calculation:

CURRENT SYSTEM + known problems

NEW SYSTEM + unknown implementation risk

...Familiar problems can feel safer than unknown implementation risk.

Over time, workarounds become part of normal operations: additional spreadsheets, manual handoffs, duplicate data entry, reports assembled outside the primary system and multiple applications supporting connected processes.

INSTEAD OF ASKING
Should we replace our software?

ASK
What part of our workflow creates the most unnecessary work, complexity, or risk?

You may not need to replace everything at once

A phased approach offers another option. You can begin with a specific workflow or operational challenge, such as a reporting process, an emissions workflow, a measurement workflow, an operational function, or a defined group of assets.

The objective is not change for the sake of change. It is to identify an area where improvement has sufficient operational value to justify taking the first step.

A PHASED APPROACH

A smaller, more clearly defined first decision

1. **Identify –** Make a smaller, more clearly defined first decision
2. **Implement –** The workflow, within a manageable scope
3. **Validate –** That it works in your environment
4. **Improve –** Measure the value created
5. **Expand –** When there's a demonstrated reason

Start with the workflow creating the greatest pain

Before looking at software functionality, look at the current process.

- Where are employees working around the system?
- Where is information entered more than once?
- Which reports require manual assembly?
- Where are spreadsheets maintained outside the primary system?
- Which workflows require information to move manually between departments?
- Where are multiple systems or vendors supporting related work?
- Where are users experiencing recurring frustration or increasing process complexity?

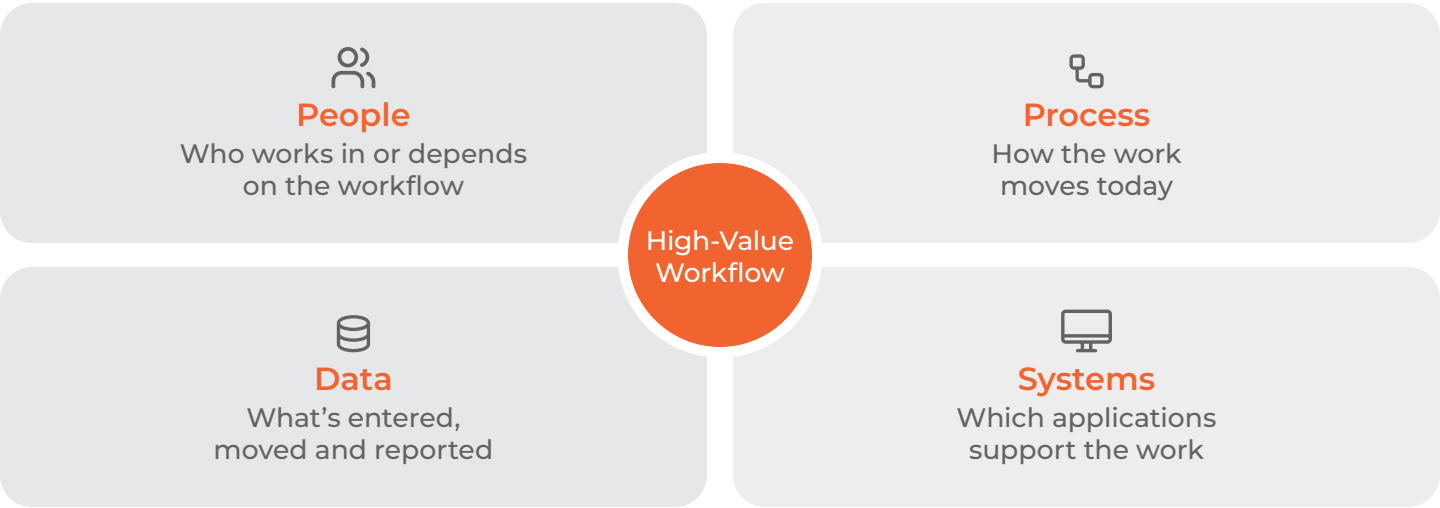
These questions shift the discussion from:

What software should we buy? TO **What operational problem should we solve first?**

Determine what really needs to change

Software migration can feel overwhelming when you treat it as one large project before you understand the requirements. Start by mapping the current environment.

Understand which data, systems, people and processes interact with the workflow, and determine what needs to change and what can remain in place.



The more clearly you answer these questions, the fewer unknowns remain. Reducing unknowns lowers the perceived risk of change.

Define success before you start

Success should not simply mean "The software is live."

Define business and operational goals before implementation.

Reduce	Improve
Manual data entry, spreadsheets, duplicate work, reporting time, handoffs, and administrative effort.	Visibility and workflow simplicity.

Use clear success criteria to evaluate the change. If the workflow improves the process, consider the next opportunity.

Implement in manageable phases

Software adoption should not begin with the largest possible project. It should begin with the right project. Start with a clearly defined operational problem. Implement the appropriate workflow within a manageable scope. Validate that it works in the operator's environment.

Measure the value created and expand only when there is a demonstrated reason to do so.

This changes the decision from:

Are we prepared to replace our software? › Is there one area where we can start?

The cost of waiting matters

Implementation has a cost. But so does staying with a system that employees continually have to work around. Those costs can appear as administrative time, manual reporting, duplicate entry, spreadsheet management, disconnected information, multiple vendor relationships, limited visibility, and processes built around system limitations.

When evaluating whether changing software is worth the effort, both sides of the equation matter.
The effort of switching *vs.* **the cost of your current environment**

A better first step: map the transition

If your organization has considered changing software but implementation concerns keep postponing the conversation, you do not need to begin with a full software demonstration.

Begin by understanding the transition.

Intricate's Software Transition Assessment is a 30-minute working conversation designed to explore what you are using today, what is working and what is not, which workflows cause the most frustration, what may need to change, what could remain in place, where a practical starting point may lie, and what implementation could involve.

Following the conversation, Intricate can summarize the discussion in a **Software Transition Snapshot** outlining your current environment, primary pain points, potential starting point, implementation considerations and recommended next step.

You do not need to decide whether to replace everything. First, determine what changing something would actually involve.

Switch without disruption

Better software should not require turning your operation upside down.

▸ **Request a Software Transition Assessment**
See what switching would actually involve.
Spend 30 minutes mapping what a transition could actually involve and identifying a practical place to start.

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