

ABOUT THE ORGANIZATION

National Oilwell Varco (NOV) is a worldwide leader in the design, manufacture and sale of equipment and components used in oil and gas drilling and production operations and the provision of oilfield services to the oil and gas industry. NOV manufactures rig structures as well as the drilling and production equipment. As one of the world's leading oil and gas manufacturers, NOV constantly strives to meet the ever-growing industry and technology demands and trends.

At the forefront of NOV's business focus is offering the highest level of customer support and service. NOV supports a range of client sizes, from big oil and gas rigs to small businesses operating only one pump. NOV's facilities concentrate on service and innovation for the products they manufacture worldwide.

The Process and Flow Technologies (PFT) business unit in NOV focuses on improving efficiencies in its customers' business operations worldwide, offering services from process consulting and training, to onsite support and repairs. Being a global company means there are many resources, work orders, and customer information to track and analyze.

SOLUTION

After combining multiple legacy service organizations into one platform, PFT needed a digital transformation solution to offer strong analytics, communicate real-time, offer mobile platform and provide visibility and scheduling capabilities across the company, while continuing to focus on providing the highest level of customer service globally.

"Microsoft Dynamics 365 really became valuable for us as we tried to implement systems that gave us a better visibility across all of our resources," says Lauren Landry, Marketing Manager. "It really allowed us to make data-driven decisions that positively impact our customers."

Dynamics 365 for Field Service

Leveraging Dynamics 365 for Field Service accelerated PFT's position as an innovative, industry leader, and allowed efficiencies across the company. Dynamics 365 for Field Service allows PFT to be more deliberate in scheduling and planning resources. The Global Calendar has revolutionized the way service managers and administrators schedule globally and has eliminated the need for individual department conversations.

"From the Global Calendar, you can view where each service technician is and what job they're on," says Meredith Erwin, Sales Operations Coordinator. "That helps other people planning, so if they need to use a particular technician, they know how far out they'll be scheduled and they don't have to wait for someone to get back to them. They already know where it is by that map and by that calendar."

The resource management feature ensures the right technician with the right skillset and availability is scheduled. Previously, the sales team or a service manager would create a work order, then contact a service technician to solve the problem. Sometimes, work orders were being created with a technician because they had previously interacted with the client, even if they were not the most qualified. Today, each technician's qualifications and certifications are stored



*NATIONAL OILWELL
VARCO TRANSFORMED ITS
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DEPARTMENTS, AND MAKE
DATA-DRIVEN DECISIONS
BASED ON REAL-TIME UP-
DATE BY UTILIZING
DYNAMICS 365 FOR
FIELD SERVICE.*



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CHRIS ROSSMAN
Director of Services & Aftermarket Support
NOV

SOLUTIONS |CONTINUED|

in Dynamics 365, so when a work order is created, the technician with the right credentials is scheduled. Dynamics 365 serves as a repository for technician certifications and enables technicians to manage certification renewals and provide proof of qualifications to customers.

Mobile Capabilities

Utilizing the mobile capability of Dynamics 365 for Field Service, technicians can better interact with customers onsite. The field service app enables technicians to have information readily available on their mobile devices. Technicians can access work orders, which pulls customer address and contact information from Dynamics 365, as well as any site-specific directions or necessary parts, eliminating redundant, internal conversations.

“The app gives me the equipment that is necessary to work on, and that gives me an idea of what tools could possibly be utilized once I get there,” says Gary Lohmeier, Field Service Technician. “I get everything at my fingertips that would usually take several conversations to achieve.”

The field service app provides a comprehensive tool for technicians to utilize on-site but also provides a platform to communicate any needs with PFT, regardless of location, and deliver real-time data back into Dynamics 365.

“The mobile app allows our service technicians to capture everything that they do on site in real-time,” says Landry. “We’re able to make decisions not a day or two days from now, we can see exactly what the technician did the minute that it happened.”

Business Analytics

Dynamics 365 for Field Service empowers PFT to make data-driven decisions for the company globally and promotes operating at a progressively high-level across all departments. Sales teams and commercial teams are seamlessly transitioning between quote and sales phases, administrators can quickly yet efficiently schedule resources, and the mobile app instantly connects technicians to customer information to provide real-time data back into Dynamics 365 from the job site.

“The largest benefit of having the field service functionality is our ability to be able to work inside of our business groups,” says Chris Rossman, Director of Service and Aftermarket Operations. “Not only can our commercial and sales teams have the same data that’s being exchanged with our service and aftermarket group, we can collaborate together and focus on customer solutions.”



CHALLENGE

NOV required a solution that offered visibility and mobile access for business growth and customer service, that would also be successfully deployed to facilities and resources worldwide.

SOLUTION

PowerObjects’ partnership with NOV focused on the importance of an innovative solution using Dynamics 365 for Field Service, while addressing change management and driving superior customer service.

BENEFITS

- + Comprehensive tool for efficient resource and knowledge management
- + Mobile platform provides real-time updates and accessibility
- + Complete visibility for enhanced customer experience



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Customer Service

Ultimately, Dynamics 365 for Field Services enhances PFT's resource management and business continuity but it is transforming its customer experience, giving them an edge over industry competitors. The real-time updates allow for instant adaptability onsite, saving PFT and customers both time and money.

"Once I have the information that I need, or I have made a decision, or I have a comment to make, or I have something to relay to my manager or the customer, I can instantly make those adjustments," says Lohmeier. "This allows everyone involved to have access to what is actually going on at the moment it is happening, which puts us all on the same page."

Customer services continues to be a primary focus for PFT at every level. With field service management, interactions have become more informative and effective, and offered an overall more pleasant experience for PFT customers.

Change Management

As a pain point in many organizations, PFT recognized the importance of addressing change management at the beginning of the implementation. PFT partnered with PowerObjects to focus on a successful global rollout and align business objectives.

"We have to challenge ourselves not only to have the best software and the best and most progressive technologies that we possibly can, we have to make sure that that's embraced by all facets of our organization," says Rossman. "With NOV operating at a global level, we have to challenge ourselves to make sure that we have that buy-in from our organization. And we want to make sure that we are successful in doing that."

The PowerObjects Partnership

To stay successful, PFT analyzed Microsoft's preferred partners who focused on Field Service coupled with innovative solutions and provided superior service, support and experience.

"The largest benefit in NOV working with PowerObjects was the fact that PowerObjects was able to entrench itself in our organization," says Rossman. "So instead of trying to get us to change the way that we actually do things, they were able to embed themselves in our culture, and understand what makes us successful and help us capitalize on those strengths."

The partnership with PowerObjects accelerated PFT's ability to operate at a high-level and drive digital transformation worldwide.

"PowerObjects' expertise in Field Service implementations gave PFT a platform and a process for successfully implementing the system," says Jason Hora, Director of Services and Aftermarket Process and Flow Technologies. "PowerObjects helped NOV get the most out of Field Service by not only achieving our initial project requirements, but also unlocking additional features that we could use."



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