

Microsoft 365 Digital Transformation

Case Study:
Todd Energy



WINNER

Empowering
Employees



HIGHLY COMMENDED

Modern
Workplace



INFORMATION
LEADERSHIP



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About Todd Energy

Todd Energy is a 100% New Zealand owned and operated natural gas producer. With offshore joint ventures, Todd are responsible for more than 50% of New Zealand's hydrocarbon energy production. In conjunction with Nova Energy, they currently employ more than 500 staff across New Zealand.

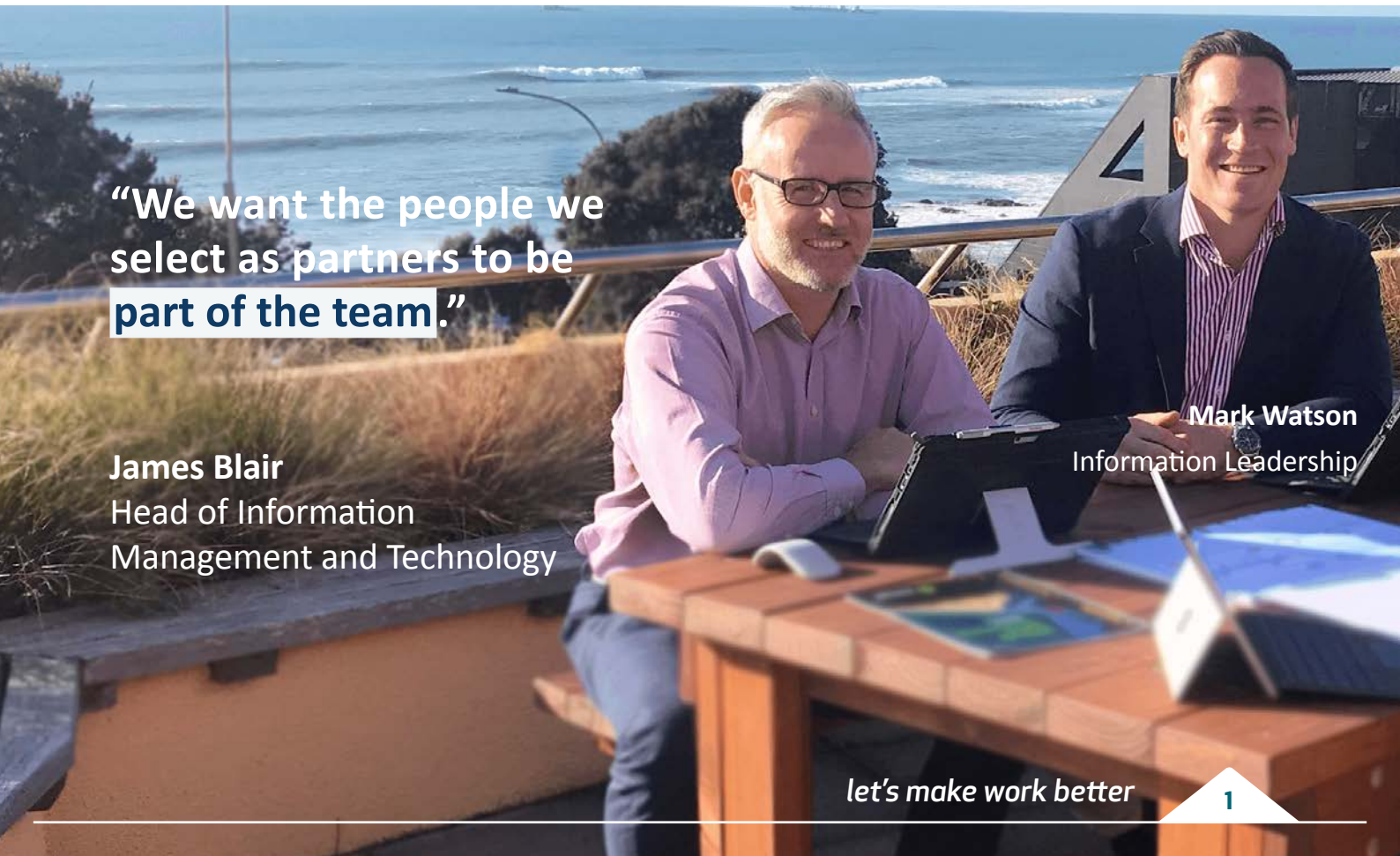
Leading the way for digital transformations

Russell Craig, Microsoft New Zealand's National Technology Officer, believes the success of Todd Energy is a roadmap for other businesses to explore how they can use digital technologies to unify dispersed teams and realise significant gains in productivity and innovation.

"We are seeing Microsoft customers increasingly move to modern approaches to enterprise content management. It's great to know that we have a world-leading content services partner like Information Leadership to assist them, and to see the Todd Energy senior leadership inspired to explore further innovations after their early successes.

Above all, this project is a testament to just how much technology can cultivate and foster a strong, cohesive team culture.

"It's about putting in place the right foundation by selecting the right platform and the right products - this Microsoft technology layer will allow us to get business performance and value" says Todd Energy's James Blair, Head of Information Management and Technology.



**"We want the people we
select as partners to be
part of the team."**

James Blair
Head of Information
Management and Technology

Mark Watson
Information Leadership

Microsoft 365 Digital Transformation

Business drivers for Todd Energy's digital transformation included: becoming an employer of choice by improving collaborative and staff engagement; and lowering the cost of production. In addition, Todd Energy wanted to streamline its operations and give staff the information tools they needed to work wherever they were located.

The solution implemented pulls together fragmented information and operations into one easy Microsoft 365 platform supported by Power BI. Since go-live in 2019, staff – from corporate teams to in-field maintenance – have been creating and consuming information seamlessly via Microsoft Teams, SharePoint, Azure, Delve, Stream, OneNote, Planner, and Power Platform.

Collaboration across departments and locations has been enabled making it easy and fast to access the right content at the right time, anywhere, any place. Better decisions, through improving the visibility of information and processes, have been enabled via Power BI and Power Automate.

Our designs have enabled seamless access to information and collaboration via:



Teams



SharePoint



OneNote



Azure



Delve



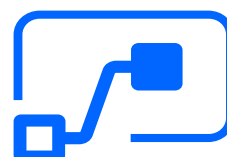
Stream



Planner



the Power Platform





What is The Sauce?

The Sauce is a platform that is transforming how Todd Energy captures, manages and uses content. With The Sauce we can automate many of the tedious document management tasks. Migrating to The Sauce allows us to focus on verifying certain compliance procedures, improving internal processes and allowing for real time collaboration for our people.



THE NEW POWERFUL SEARCH

You should be able to find a document in seconds, not minutes. The custom search is one of The Sauce's greatest tools. You can search for documents across all departments in seconds without the need to navigate through folders or slow network drives. You can filter your results by document type, date, author, activity and more.

SEARCH, COLLABORATE & SHARE FROM ANY DEVICE



Your documents aren't restricted to your PC anymore! You can now search, edit or share your files directly from any device.

Need to search or access a document while out of the office? With The Sauce it's intuitively easy.

YOUR DOCUMENTS PROTECTED & SECURE



SECURE ACCESS TO ALL YOUR DOCUMENTS ANYTIME, ANYWHERE

Collaboration has never been this easy. With The Sauce you and your team can work on the same document at the same time from anywhere! No more duplicate content or waiting for a colleague to finish their part before starting yours. This is real time live collaboration with The Sauce.



The Sauce ensures that your documents are kept safe no matter what happens. Things like **data backups, data encryption, viewing permissions for confidential content, protection against hackers and malware** are what matters. This is why we chose Microsoft and their enterprise-class technology to host our data. This means we will always have up to date technology, cyber protection and features. Over 3,500 dedicated Microsoft cybersecurity professionals help protect, detect, and respond to threats.

What about my personal documents?

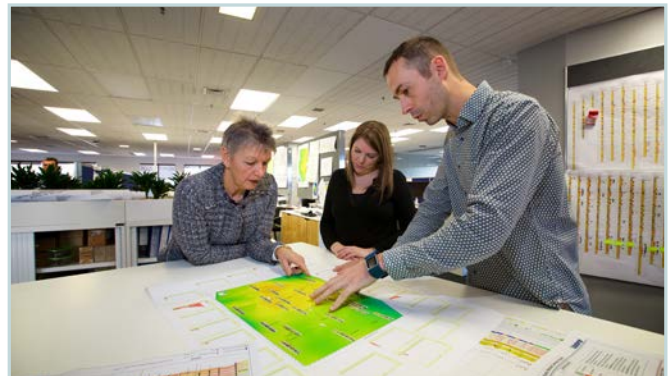
All your personal OneDrive data can only be viewed by you until you decide to share a document!

What about my team's confidential documents?

We can set special restricted viewing and editing permissions on all your team's confidential folders and documents.

Oops, someone deleted/edited the wrong content!

Not a problem! With The Sauce your Office documents have revisioning built in. Accidental file deletions can also be restored.



Empowering Employees

"It is great to have one homepage where we can access all the systems, applications, documents and content we need to do our job at the Bell Block Stores."

Brad Harrison & James Ferguson
- Warehouse Team Storemen



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What's been achieved

Empowering & energising employees, reducing risks, raising productivity

Anytime, anywhere working

Microsoft 365 generating engineering 'work packs' with information collated from multiple systems available via mobile devices

Better hazard identification and communication

Using Flow to auto-populate hazard forms and then presenting this information in a standard layout where all staff are quickly and easily informed

Reporting on production and maintenance

Using Microsoft 365 to aggregate data from multiple systems and then using Power BI to present actionable visualizations of the data

Collaborating on projects

Using Microsoft Teams for running plant maintenance projects and other initiatives related to plant reliability. This, coupled with the use of Planner to manage tasks, has made it easier to resolve issues and make progress

Greater productivity, high rates of adoption

Using innovative Azure hosted Apps - these support Todd in meeting compliance needs through auto classification, template management and secure case files



Production Operator at the McKee Mangahewa facilities

Helping staff learn, share & grow

Sharing information

using Microsoft 365 for confidence in sharing and relying on information, as well as timesaving and collaboration from co-authoring complex documents

Reducing waste, increased security

by providing meeting papers digitally that the Leadership Team access on their Surface Pro computers

Business improvement

staff seeing the potential of Flow and Power BI and embracing the use of these tools directly

Supporting self-education

by providing a central video repository of all videos using Stream

Staying in touch

using Delve to keep contact lists current and making it easy to get in touch with people



Over 150 Power BI reports alone are currently being used for production data, project tracking and tracking of controlled documents.

Over a six-month period, Todd Energy increased its licenses of Power BI from a handful to more than 130.



Todd's McKee/Mangahewa Production Station, with Mt Taranaki in the background



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Perspectives from the business

Target business drivers, right foundation

"We're looking to lower the cost of production and being an employer of choice by being a more collaborative organisation and improving our engagement scores.

It's about putting in place the right foundation by selecting the right platform and the right products - this Microsoft technology layer allows us to get ongoing business performance and value."



IT/IM

James Blair



IM

Stephanie Richardson

Better job satisfaction, higher productivity

"People just want to go and do their job, so if they can't because they spend too much time trying to find information, it adds a lot of frustration to their day.

We're now re-using and finding information to quickly plan and prepare the maintenance work, and then spend most of our time actually delivering it - which is the actual value in what we do."



**Reliability
& Integrity**

Steve Smith



Comms

Hannah Heberley

Ownership and opportunities

"I see the big opportunities for us being the integration of Microsoft 365 with other line of business systems. We've got quite a large list of enhancements that the business has asked for already.

I think this is where the business is going to become even more engaged and they are going to start owning The Sauce a lot more - because it's essentially their brainchild"

Connected and engaged

"I think we're more on the same page. We can share lots of vital pieces of information meaning we know a lot more about what's going on.

We're not just associates, we are connected and we know more about each other, what people are working on and what people are involved in."

Challenges

“In the past SharePoint was deployed without structure and grew organically. Over time this meant people couldn’t find their stuff. That’s one of the reasons we selected Information Leadership as a partner - getting the information architecture right is one of their core strengths.”

James Blair
Head of Information Management and Technology

Todd Energy was facing two main challenges

Challenge

#1

Expectations of advanced digital ways of working from employees & new recruits



**Head of Information
Management and Technology**

James Blair knew that simply releasing the tools would not give Todd the strategic gains it was looking for.

“We’ve got a number of generations in our workforce and they want to come into an organisation where they can work digitally. It’s important for Todd to have a foundation that allows them to do that.

You need platforms you can rely on to allow people to ascertain the good content that they need.”

Challenge

#2

Fragmented information impacting on collaboration & productivity

Information Management Specialist

Prior to the Microsoft 365 implementation Todd Energy had fragmented information stores. People were sharing files on multiple network drives, hard drives, desktops and various intranets.

“It is fair to say that nobody had one place to go to access one source of documentation. There was no structure as we had no taxonomy in the background. We ended up with duplication of files and we still had people accessing network drives as well.”

Reliability and Integrity Manager

Steve Smith’s core responsibility is to deliver a robust process to make sure Todd Energy is operating in the most effective, efficient way.

“We had traditional file servers, top drawers and bottom drawers within people’s filing cabinets, and manuals hidden away.”

Solutions

"We're now re-using and finding information to quickly plan and prepare the maintenance work, and then spend most of our time actually delivering it - which is the actual value in what we do."

Steve Smith
Reliability and Integrity Manager



Easier to collaborate

"Having one centralised spot for everyone to collaborate makes updating Board papers and documents by multiple people much more efficient.

Being able to keep track of who has been in the document to make their amendments streamlines the process."

Louise Hamerton, Executive Assistant

ICT Perspective

"A large number of our staff are based in the field. We needed something that accommodates the requirements of the most digitally challenged people in the organisation through to some of the most technology savvy ones..."

"When people are looking for content around a particular work pack, they just punch in a number, and it automatically brings up everything relating to the work pack. That's a key piece for us – integration with our maintenance system."

James Blair, Head of Information Management and Technology

Todd Energy targeted the consolidation of its maintenance 'work packs' as an early solution to improve productivity and provide a seamless experience for staff. By integrating its maintenance system with Microsoft 365, folders for each maintenance project are automatically created and staff drag and drop the relevant content (scopes of work, reports, contracts) into the folder.

Compliance game changer

"Having an environment that allows us to provide the evidence quickly and easily allows us to meet compliance efficiently - so from a risk perspective it helps us a lot."

Steve Smith,
Reliability and Integrity Manager

Work Packs: Combining asset information & job details

The 'work packs' are used by multiple teams and everyone can access content directly wherever they are.

SharePoint

The Sauce > Activity Sites > Asset Management > Reliability - Integrity - ... > Work Packs Register

Home Working Here Assets Activity Sites TE Hub Content

Reliability - Integrity - Maintenance Planning RIM
Private group

Search

+ New Export to Excel Quick edit PowerApps Flow

Work Packs Register > 310-M-200

Link	Status	Date
2019 03 25 Engine 18 ...	Complete	25/03/2019
2019 03 01 Engine Bre...	Complete	1/03/2019
2018 12 06 Alignment ...	Complete	6/12/2018
2018 12 03 Engine 2 ...	Complete	3/12/2018
2018 10 26 Engine Bre...	Complete	26/10/2018
2018 10 17 Engine Bre...	Complete	17/10/2018
2018 10 03 Engine Bre...	Complete	3/10/2018
2018 07 27 Alignment ...	Complete	27/07/2018

Work packs that have been completed for asset 310-M-200

File Home Share View

Pin to Quick access Copy Paste Cut Copy path Paste shortcut Move to Copy to Delete Rename New folder Easy access Properties Edit History Select all Select none Invert selection

Return

Reliability - Integrity - Maintenance Planning RIM - 2019 03 01 Engine Breakdown wastgate cracked 310-M-200

Name	Status	Date modified	Type	Size
310-M-200.PNG		15/03/2019 7:55 AM	PNG File	2,160 KB
310-M-200_2.PNG		15/03/2019 7:55 AM	PNG File	2,096 KB
2019 01 17 310-M-100 Oil Tubing Failure		1/04/2019 10:49 AM	Shortcut	4 KB
2019 03 02 Callout Leaking Wastgate Repo...		5/03/2019 3:23 PM	Foxit Reader PDF Do...	261 KB
2019 03 21 Fabricate and Install Replacemen...		26/03/2019 1:24 PM	Foxit Reader PDF Do...	535 KB
FW_ 310-M-200 Coolant leak.msg		15/03/2019 7:55 AM	Outlook Item	4,726 KB
Fwd_ K-200 Water leak.msg		15/03/2019 7:55 AM	Outlook Item	124 KB

Example of a work pack, as made available via OneDrive for Business.
The files contain information from multiple sources

#2

More “on the same page” with Microsoft Teams

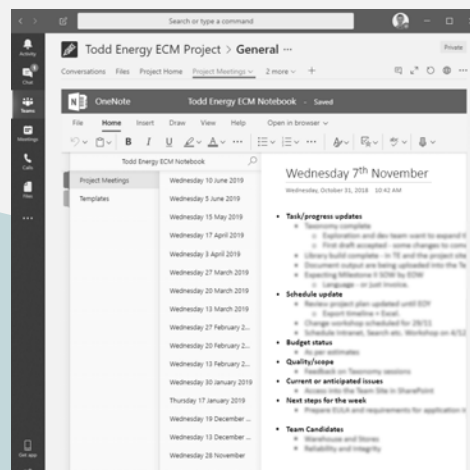
Teams has been a game-changer for running projects and other initiatives. This success has been mirrored in the wider organisation. In the Reliability and Integrity area Teams is key to how they work together.

For delivering this Microsoft 365 project, Teams was the primary mechanism for working together. The combined Todd Energy and Information Leadership project team use chat, video and screensharing, shared information and Planner all within the Teams interface.

"We've set up in the region of eight to 10 team sites in my area, to do with shut-downs, and reliability and integrity and CMMS systems.

It's something people have really adopted. I was quite surprised when I first started to see how advanced they are in the Team's Planner area. It's really good for collaboration and putting structure around what we are doing."

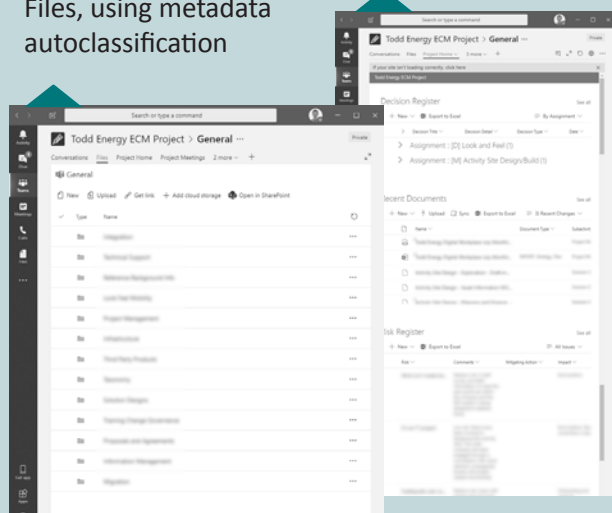
Steve Smith, Reliability and Integrity Manager



One Note

Shared info & registers

Files, using metadata
autoclassification



USING POWER BI TO ALLOW EMPLOYEES TO TAKE THEIR PERFORMANCE & INNOVATION TO A NEW LEVEL

The platform is also helping Todd Energy deliver projects quickly and more effectively. Key project information is extracted into SharePoint Online and, combined with Power BI, to enable Todd Energy to get powerful actionable information.

For example, for its 'Plant Change Requests', Todd Energy can now visualise whether projects are on schedule and they can identify any bottlenecks that are hampering completion. This also gives the Leadership Team visibility of progress, resourcing levels and other key metrics.

Power BI has been a key enabler

"We made a strategic decision to use Power BI in our organisation. It's shifted our dial on data maturity, allowing us to move from summary reports through descriptive analytics and through to diagnostic analytics. We find that everybody's using this reporting capability now that didn't exist before.

Previously someone would print a report or a spreadsheet. People are actually using the Power BI reports now and it's becoming more dynamic. People can access the report directly themselves, anywhere, anytime, rather than waiting for someone else to develop something and then to print it."

James Blair, Head of Information Management and Technology

USING FLOW TO STREAMLINE ITS ACTIVITIES

Todd Energy has been able to reduce its reactive plant maintenance area work. Flow has enabled the team to quickly record any reactive work that comes up.

By automating the request and approval process for reactive work, the maintenance team is better able to understand why the problem has arisen and to test whether a reactive fix is necessary.

"As a result of the Flow deployment we've seen that workload significantly reduce. The result is that we are in a much more planned environment - that's a good outcome."

Steve Smith, Reliability and Integrity Manager

130

Over a six-month period Todd Energy increased its licenses of Power BI from a handful to more than 130.

150

Over 150 Power BI reports are currently being used from production data, project tracking, to tracking of controlled documents.



Todd has a vibrant culture with great opportunities to learn and grow. Microsoft 365 has enabled them to take this further, working more easily across the organisation and supporting staff in managing work/life balance.

Prior to the intranet, named the 'The Sauce', communication with staff was hierarchically based. Updates and information came from the top down and staff would have to wait for an email from the General Manager or the Chief Executive. There were face-to-face, all staff meetings about every six weeks, but there would be information gaps in between.

More on the same page

"I think we're more on the same page. We can share lots of vital pieces of information that means we know a lot more about what's going on.

We're not just associates, we are connected and we know more about each other, what people are working on and what people are involved in."

Remote working, flexibility really valued

"My immediate thought was that it's good that I can do everything remotely. I'm not alone in the way that I work. I work part-time, around kids and there's a lot of people who work from different offices, they work from sites, they work from home, they work when they travel and being able to access information on the go that's what people expect nowadays – and it's quite cool to be able to deliver it."

Hannah Heberley, Communications Advisor

Paper to digital - changing mindsets

"18 months ago, the Leadership Team were printing out screeds of paper to take to their weekly Monday meeting. The Executive Assistant would be running in and out of the meeting constantly, getting updates to things. Now with the use of their Surface Pros, they are all electronic.

None of them take paper into that meeting. I think that's a combination of the technology plus also what we are building into the software to really help them as well. So, that's a huge change for a team where most of them have been in the business for quite some time."

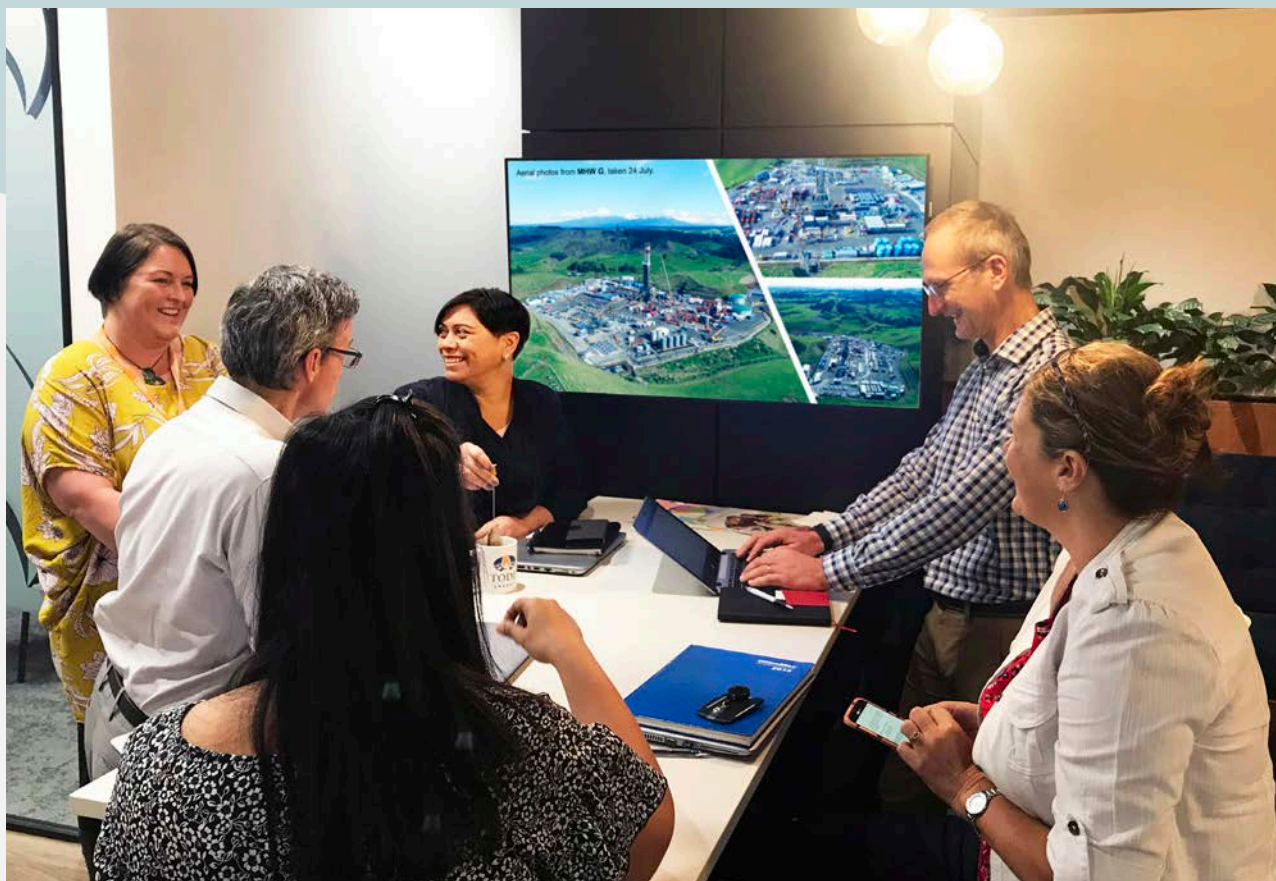
Steph Richardson, Information Management Specialist

40+
per week

Access to
standardised forms
including permits to
do work, isolation
requests and reactive
work requests.

75+
per week

Business Applications
page – one place to
go to access all Apps.
Really helpful for new
starters. Previously
staff went to a
spreadsheet.



Everyone in the loop

“Now we have digital notice boards in lunch rooms - we can much more quickly, frequently and visually communicate, stuff in real time.

So when something happens, thirty minutes later, it can be up on one of those screens...I think we're more connected as a result and we know a lot more about what's going on...”

Hannah Heberley, Communications Advisor

200+
per week

Views of
'Working Here' reference and
how-to information

Streamlining document management with Smart Records

Three years into The Sauce, the project to reimagine its enterprise content management (ECM) system, Todd Energy sought out a better way to manage the mountain of digital documents it needs to keep track of...

IN A NUTSHELL

- iWorkplace Smart Records 365 saves time and reduces business risk
- Compliance documents automatically tagged for retention or disposal
- Smart Records will be used to automate reporting, giving business managers an easy way to keep on top of document management

Information Leadership's iWorkplace Smart Records 365 is the leading document management application for the Microsoft environment. It allows users to create a taxonomy and set rules to govern retention and destruction of documents, automating much of the R&D process.



Stephanie Richardson
Senior Information Specialist

"Their job is to get gas out of the ground, our job is to keep everything tidy in the background – Smart Records is helping us do this.."

IMMEDIATE RESULTS

"We've got over one million documents, we don't need to store everything. We can claw back our storage," says Steph Richardson, Todd Energy's Senior Information Specialist.

With new rules applied using Smart records, the process of searching and finding documents is quicker and easier.

Most importantly, Todd Energy is reducing its risk of accidentally deleting important documents or holding onto them for far too long.

As Todd Energy continues on its digital transformation, Smart Records will allow it to more easily navigate potential future changes to the structure of its business." says Richardson who sees Smart Records playing a crucial role in helping Todd Energy's +320 staff and equivalent number of contractors spend less time on paperwork.

"Smart Records makes it easier for Information Managers to use the Microsoft 365 toolset and get the helicopter view they need for good information management and governance."

Sarah Heal, Director
Information Leadership



About Us

"Your growth is reflection of the great company, people you employ and much trusted partner you have grown to be for many kiwi companies!"

Stephanie Richardson,
Senior Information Management Specialist,
Todd Energy



New Zealand's award winning specialists in Microsoft 365 & Teams



What we deliver for Microsoft 365 & Teams...

Easy & Flexible

We deliver the modern workplace, choice of device, and friendly interface and tools that people expect...

Confidence & Control

... and be sure everyone has the right information at their fingertips, allowing them to do their best job.

200+ NZ Digital Workplaces | Commercial & Public Sector

Commercial and utilities

Public sector including local government

Integrated change management & governance

Strategy & tactics to get the most from M365

Teams Framework for compliance & collaboration

Public Records Act compliance, Retention & Disposal built in

What our Customers Say

"We consider Information Leadership a true partner: we partner with organisations where it's a two-way street ... We want the people we select as partners to be part of the team."



James Blair, Head of Information Management & Technology



"Thanks to the whole Information Leadership team for your help and support. We wouldn't have achieved anything like the outcome we have with anyone else but you guys. Truly awesome!"



Steve Manners,
Chief Information Officer



"Information Leadership has a consistent professional approach and consistent delivery of the product. We recognise it's a partnership and Information Leadership worked hard to enable us to continue to operate with the rapid roll-out of Teams due to Covid-19 – that was awesome!"



Jason Marris,
GM Engagement and Transformation



"Working with Information Leadership was a great partnership – we were working together on a shared journey, not telling each other what to do. Responsiveness of the IL team is super fantastic... I respected the knowledge IL staff brought into the workspaces."



Naomi Aporo,
Group Programme Manager



"Our Board was extremely impressed with the solution and ease of accessing their Board papers. We got a top class service and solution from Information Leadership which leverages M365 technology perfectly."



Jeremy Clement,
Financial Controller



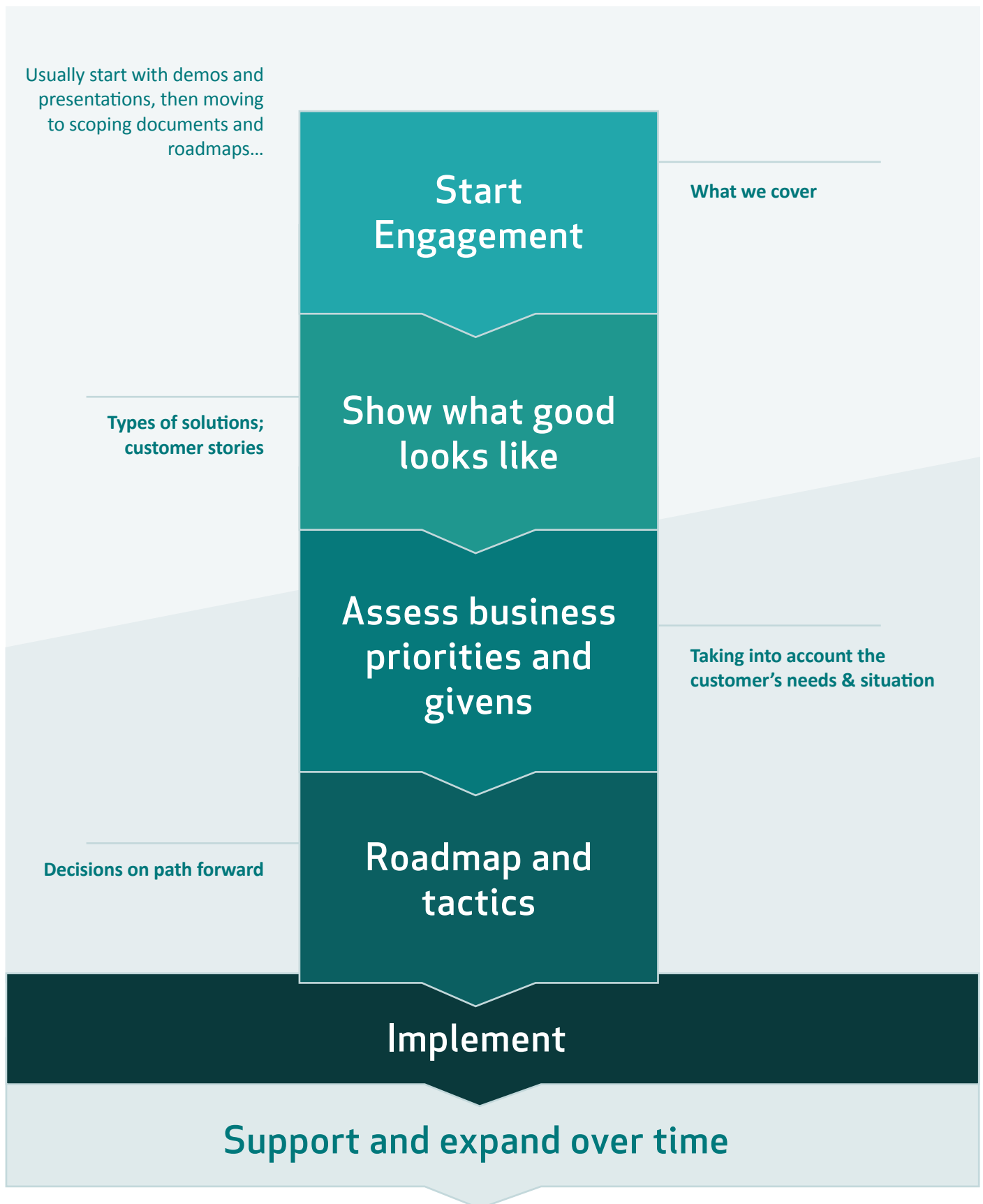
"Information Leadership exceeded our expectations. They took a "no barriers to delivery" approach, helping us with internal technical issues and working extremely well with a complimentary vendor. Their great people made it easy for us to succeed together."



Justine Auton,
Service Delivery Manager



How We Engage: Co-creating Each Customer's Microsoft 365 Modern Workplace Future





Microsoft Partnership

Microsoft
Partner

Gold Cloud Productivity
Gold Collaboration and Content
Gold Application Development
Silver Project and Portfolio Management
Silver Enterprise Mobility Management

NZ's only Content Services Partner

Information Leadership is the only NZ Microsoft partner, and one of just 41 partners worldwide, to be Charter members of the elite.

Microsoft selects partners in the Content Service program for their proven ability to help customers succeed and achieve more with their content in Microsoft 365.

We're recognised for our proven expertise in implementation and compliance/record management.



"It's exciting to see Information Leadership become a Charter Member of our global Content Services Partner Program. We're seeing Microsoft customers increasingly move to modern approaches to enterprise content management. It's great to know that we have a world-leading content services partner able to assist them."

- Russell Craig, Microsoft New Zealand, National Technology Officer

Empowering Employees Partner of the Year 2019 - Todd Energy

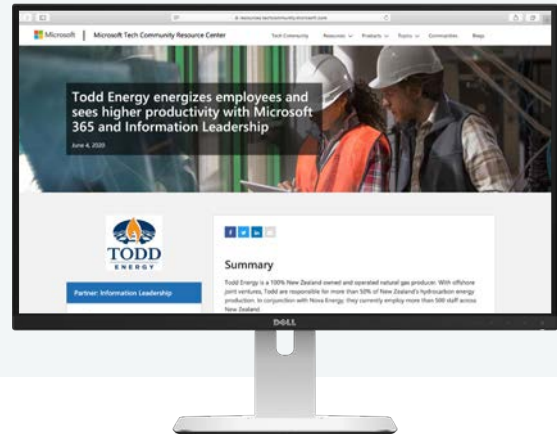
Information Leadership was named Microsoft NZ's Empowering Employees Partner of the Year. Todd Energy's Head of Information Management James Blair and Senior Document Controller Stephanie Richardson, joined the IL team at the awards ceremony to celebrate the shared success.

"Employees at Todd Energy have benefited greatly from Information Leadership's solution, which pulled together fragmented information and operations into one easy Microsoft 365 platform supported by Power BI. Office and field staff found themselves able to collaborate, source information, track progress and work flexibly in ways never before possible." - Microsoft New Zealand

Case studies on Microsoft.com

Resources to help accelerate Microsoft 365 in your business are accessible online via Microsoft's Tech Community Resource centre.

We're proud our case studies are featured including; Todd Energy, Pan Pac Forest Products, Forest and Bird, and various Councils.



Webinars

Information Leadership and Microsoft co-hosted two webinars. Learn:

- how to get started with [Teams governance and compliance](#)
- the key provisions of the NZ Public Records Act
- how [Microsoft 365 provides support to meet PRA requirements](#)

Both webinars are available to watch on demand.



By allowing your organisation to unify communications, Microsoft Teams helps you stay compliant. To learn more about the iWorkplace Teams Framework solution and how it supports governance and compliance with auto ...see more



Teams now does even more. Register for our FREE webinar
mktoevents.com

White paper

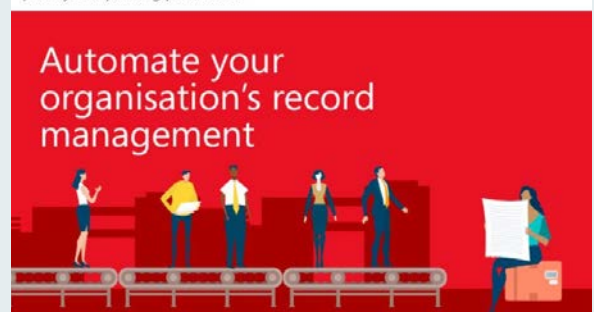
Published by Microsoft in January 2021.

The white paper documents an assessment by Information Leadership of the capability of Microsoft 365 to support organisations in meeting their obligations under the New Zealand Public Records Act 2005.

Download the white paper <https://aka.ms/NZPRA>



Did you know Microsoft Teams can be configured with a range of automatic compliance settings? Now you can rest assured shared content meets the security requirements of your organisation. Read our exclusive whitepaper today and future-proof your operating procedures.



Make compliance easier. Read the whitepaper.
info.microsoft.com

[Learn more](#)



Teams First

Teams is where real work gets done

iWorkplace Teams Framework is our structured way of delivering:

- Collaboration and enterprise content management
- no matter where your staff and customers are

Makeovers and restarts

Customers who have gotten off to an unstructured or poorly structured start with Microsoft 365 and now have a mess and poor findability/usability

New starts

First in their sectors using Microsoft 365 to reduce risk and empower employees

Capital & Coast District Health Board

Started with intranet, policy & procedures and contract management

Central Hawkes Bay District Council

All business activities

Earthquake Commission

All business activities

Migration from on-premise

Ports of Auckland

Where customers have significant SharePoint on-premise ECM and wish to move and embrace Microsoft Teams and the full Microsoft 365 modern workplace. Our IP includes a 25 page whitepaper on strategy, tactics and a migration roadmap



Read the whitepaper:
informationleadership.co.nz/go/whitepaper01

Contact us today

Free phone

0800 001 800

Email

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Web

informationleadership.com/contactus



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