



## Case Study: P2 Energy Solutions



### Overview

P2 Energy Solutions (P2) is best known for providing accounting and financial software for energy corporations. By embedding ProcessMaker in its existing offering, P2 has expanded its solution capabilities to better serve its customers.

P2's customers relied on manual, human-driven tasks to meet workflow needs, limiting the ability for each client to reach its full operational potential. The energy solution provider required a workflow platform that integrated easily with its legacy systems, yet delivered powerful enterprise functionality. To solve this issue, ProcessMaker's platform integrated with P2 to create P2 Workflow, a comprehensive OEM solution that solves complex workflow challenges for P2 customers.

### The Problem

P2 Energy previously housed workflows within a specific application. This posed multiple problems due to the increasing need to gather information from several systems, then leverage that information to execute workflows. As P2 Energy's customer base has grown, clients managed platforms familiar to staff, yet expensive to maintain. Due to their outdated nature, many of these platforms don't have the desired functionality required to meet each customers' needs.

P2 Energy's technology stack included over 100 different software solutions, required a workflow solution to compliment existing systems. Its lease approval process didn't connect to other processes, and integration for production volumes often went to external software. In

P2 Energy Solutions supplies financial and accounting software to 1,700 oil and gas companies to support billions of transactions across hundreds of thousands of wells. In order to support increasing customer demands, P2 Energy partnered with ProcessMaker to build P2 Workflow, an OEM solution powered by ProcessMaker.

#### Industry

Oil and Gas

#### Country

Denver, CO, USA

#### The Problem

- Technology stack included over 100 different software solutions
- Required a workflow solution to compliment existing systems
- Lease approval process didn't connect to other processes
- Integration for production volumes will often go to external software
- Geological offerings not part of traditional accounting packages
- Energy companies and their software must comply with complex governance dictated by state and federal law

*"Any business is a series of workflows."*  
Tim Wadle, VP of Product Management at P2 Energy

In addition, P2 Energy's geological offerings were not part of traditional accounting packages. Having a workflow software solution that could be easily integrated and white-labeled was critical to meet state and federal regulations, while exceeding customer demands.

## The Solution

P2 clients began exploring ways to reduce or eliminate repetitive tasks to drive down costs and adopt more efficient workflows, eventually adopting the ProcessMaker platform as an OEM solution into the solution suite. The solution was branded as P2 Workflow. ProcessMaker was able to connect several systems into one platform to solve customer requirements across the enterprise, delivering the tailored, customizable solutions needed by oil and gas companies for their customer bases. P2 Energy would also train its staff on the ProcessMaker platform to deliver solutions to their customers as quickly as possible.

## The Value Created

Today, P2 Workflow—powered by ProcessMaker—layers over top of its legacy environment to call, process, and distribute data across its clients' enterprises to solve business needs. P2 successfully configured P2 Workflow to call data from across their client's enterprise—linking information to create solutions ranging from land management to geospatial data, to oil and gas, accounting, and more.

P2's Workflow solution knits together a wide variety of disparate point solutions and legacy systems to extend value. By pre-packaging common workflows to the oil and gas sector, P2 Energy saves implementation time by quickly customizing "out of the box." Operational visibility is enhanced as a result, and repetitive, manual tasks are now automated, saving time, money, and precious resources in the process.

Additional value is achieved through each integration's specific client requirements—even third party systems on the domain, department, or cross-company levels. This level of connectivity is known to be a major driver of organizational performance from the top down. P2 Workflow has also used workflow mapping to create a highly effective IT risk management solution for system upgrades and future technological changes for their oil and gas customers.

## The Solution

- Embedded ProcessMaker into previous solution suite to create P2 Workflow
- Custom built notifications to ensure necessary data is updated
- Developed effective IT risk management solution for customer system upgrades
- Prepackaged workflows available for more than 20 common oil and gas processes
- Connected workflows across applications to solve customer requirements
- Trained P2 staff in one week to quickly design and deploy their own workflows
- Processes unified in central location to execute from one comprehensive platform

## The Results

- Request forms are now reusable across multiple departments to submit requests
- Workflow timer kicks off and processes reports in real-time
- Easy to follow audit trail to help meet regulatory compliance and legal requirements
- Seamless integration with prior accounting software and enterprise risk processor
- Field staff are able to complete work from virtually anywhere

P2's unmatched expertise and leadership in addressing the technical challenges of the oil and gas industry — combined with ProcessMaker's intelligent platform — has created a comprehensive, integrated solution tailored to address the unique business needs of the modern energy industry.

## About P2 Energy Solutions

P2 Energy Solutions is the only technology company that provides a comprehensive range of software, geospatial data, land management tools, and outsourcing to the energy industry. More than 1,200 companies use P2 products and services daily to improve decision-making, gain clarity into complex workflow scenarios, and optimize upstream efficiency. P2 employs nearly 700 people, formerly a privately-held portfolio company of Vista Equity Partners. On October 7, 2013, P2 Energy Solutions was acquired by a Boston-based private equity firm, Advent International.



## About ProcessMaker

ProcessMaker is low-code BPM and workflow software. ProcessMaker makes it easy for business analysts to collaborate with IT to automate complex business processes connecting people and existing company systems. Headquartered in Durham, North Carolina in the United States, ProcessMaker has a partner network spread across 35 countries on five continents. Hundreds of commercial customers, including many Fortune 100 companies, rely on ProcessMaker to digitally transform their core business processes enabling faster decision making, improved compliance, and better performance.

## What P2 Workflow Can Offer, 100% Pre-Packaged:

- Marketing Election Change
- New Entitlement Notifications
- New Product Notifications
- New Well Drilled Notifications
- Revenue Close Documents
- Owner Relations
- First Production Notice
- DO Status
- Payout
- Well To Be Drilled
- Title Completed
- Ownership Change
- Well Status Change
- Reg Communication
- Non-Consent
- AFE Balloting
- Acreage Change
- Business Associates
- Lease Rental Payment Notice for Accounting
- New TMPs
- New APCs

## Integrations

P2 Energy solution suite to create OEM solution, P2 Workflow

