Case Study: Implementing Enterprise Content Management at Marathon Oil

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Gartner Portals, Content & Collaboration Summit
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Gartner

Who we are

- Global independent exploration and production company
- 125 years in operation
- ~3,400 employees
- Focused on:
  - Safety & environmental stewardship
  - Profitable growth
  - Liquids-rich resources
  - Social responsibility

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Marathon Information Management Program

- **Goals**
  - Enable easy-to-use and consistent access to the *relevant, up-to-date* and *trusted* information needed to monitor performance, to pre-empt potential problems and to take decisions
  - Implement consistent records management to ensure we preserve the information required for legal and regulatory compliance
  - Construct the work platform for the next generation – a new foundation for collaboration and knowledge sharing

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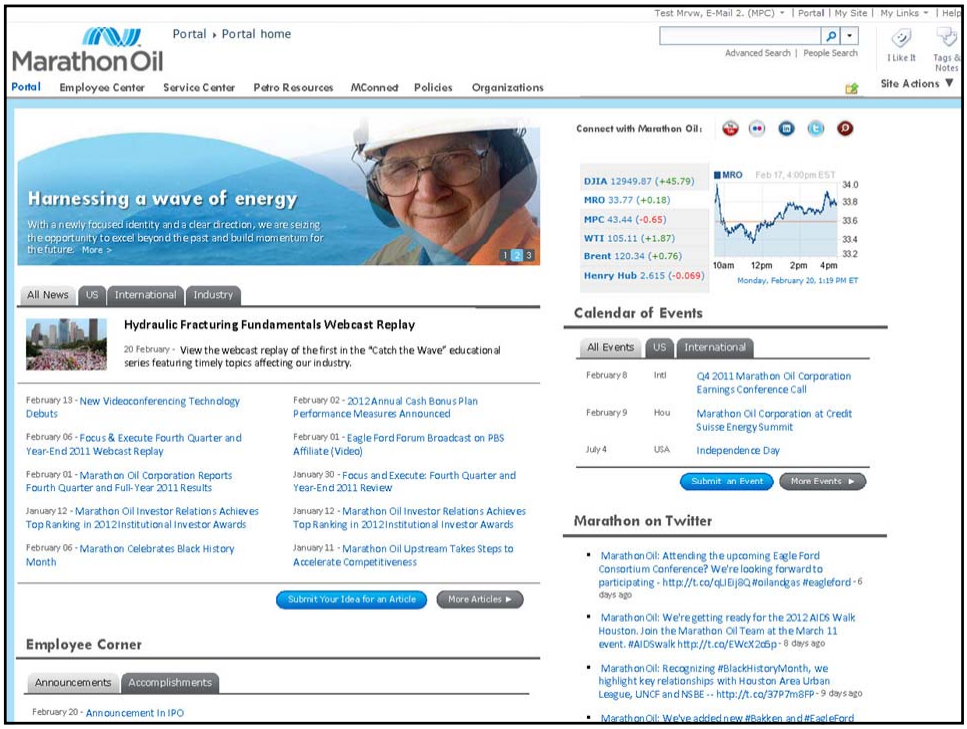

Organizational plumbing

- **Dimensions**
  - Policies
  - Processes
  - Tools
  - Roles
  - Ongoing Support
- **Stakeholders**
  - Value Chain
  - Law
  - HR
  - Internal Audit
  - Investor Relations & Public Affairs
  - IT
  - …

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Dimensions – achievements

Policies
- Corporate Information Management Policy
- Retention Schedule

Processes
- Analysis, Classification, Security, Site Design, Migration, Records Management

Tools
- Microsoft SharePoint 2010, Open Text Content Server, Search
- Knowledge Connections: people to information, people to people
- Records Management, Hold Order Management, eDiscovery

Roles
- Information Champions, Information Asset Managers, Site Owners, Information Owners, Data Stewards, Records Coordinators

Ongoing Support
- Training, Help Desk, Compliance Readiness Assessments, Records Management

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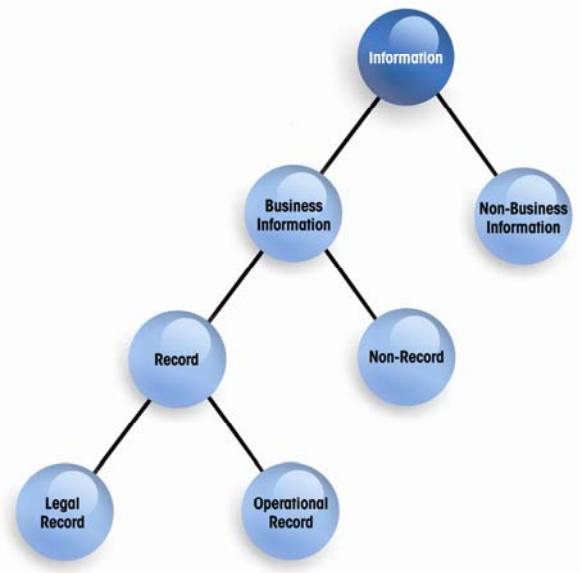
Information types



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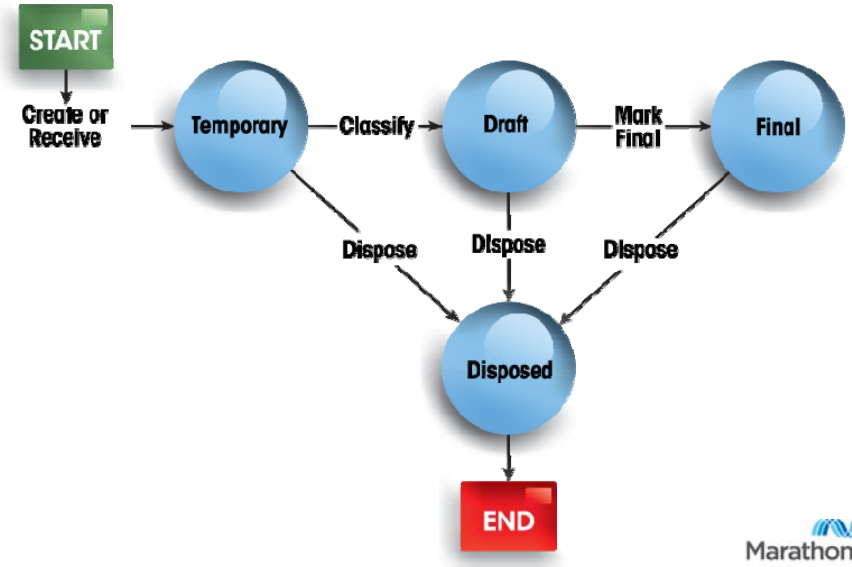
Information states



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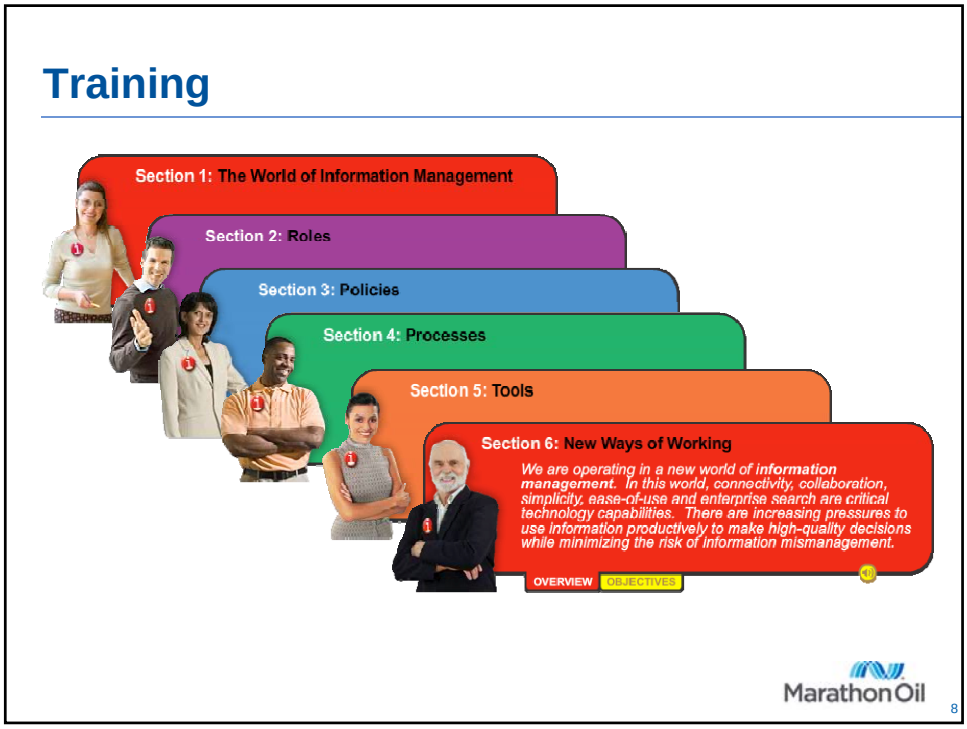
Training
Section 1: The World of Information Management
Section 2: Roles
Section 3: Policies
Section 4: Processes
Section 5: Tools
Section 6: New Ways of Working
We are operating in a new world of information management. In this world, connectivity, collaboration, simplicity, ease-of-use and enterprise search are critical technology capabilities. There are increasing pressures to use information productively to make high-quality decisions while minimizing the risk of information mismanagement.
OVERVIEW
OBJECTIVES
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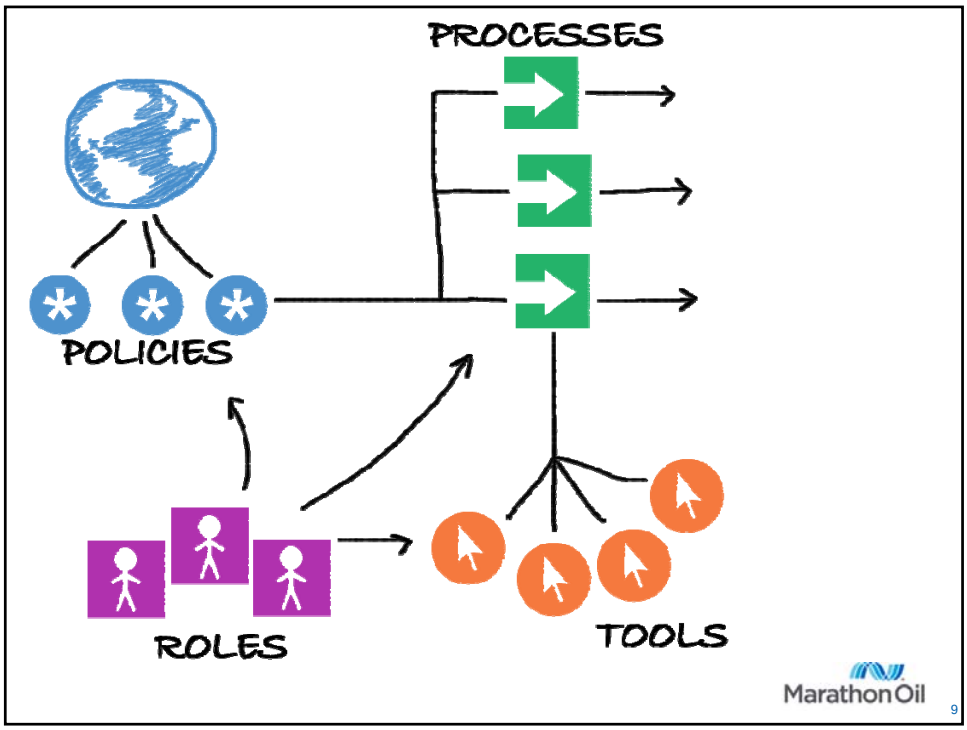
PROCESSES
POLICIES
ROLES
TOOLS
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Stakeholder concerns

- **Value Chain**
  - Easy-to-use access to *relevant, up-to-date* and *trusted* information
- **Law**
  - Consistent information management processes
- **HR**
  - Management of personal information
- **Internal Audit**
  - Compliance with policies & standards
- **Investor Relations & Public Affairs**
  - Communication, news
- **IT**

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IT concerns

- **Adoption / Compliance**
  - Performance & Reliability !!!
  - Ease of use
- **Functionality**
  - **Search**
    - Advanced & Faceted Search
    - Across all repositories
    - eDiscovery
  - **Collaboration**
    - Web 2.0, Social Media, …
- **System Integration**
  - SharePoint, SAP, business applications
- **Cost**
  - Including retirement of legacy systems
- **Disaster Recovery**
- **Lifecycle Management**
  - Retention Schedule
  - Electronic & Physical Information
- **Worldwide Implementation**
  - Country Laws
  - Performance
  - Synchronization
  - Failover
- **Analysis, Classification, Migration**
  - Metadata
  - Scale
  - Operational & legal basis for cleanup
- **Security**
  - Confidentiality, Integrity, Availability

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The journey so far

- **2005-2008 – Preparation**
  - **High:** business case, value chain engagement, support organization, policy
  - **Low:** project execution
- **2009 – Launch**
  - **High:** governance – Information Champions; training program
  - **Low:** system performance, scope, processes and tools for policy compliance
- **2010 – Large-scale analysis / migration**
  - **High:** value chain penetration; consistent records management
  - **Low:** system performance, analysis / migration tools
- **2011 – Company Split**
  - **High**: upgrade to SP2010, robust hardware and support model, updated retention schedule; information governance team
  - **Low:** system performance … exacerbated by split activities
- **2012 – Moving forward as a new E&P company**

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The road ahead

- **Maintain momentum – deliver on promises**
  - Deploy international instances
  - Simplify
  - Continue to mature functionality and scalability
  - Continue conversion from legacy systems
- **Information Quality**
  - Extend information governance responsibilities
- **New Work Platform – Information Workplace – Digital Oilfield**
  - Increase leverage of SharePoint as a platform
  - Extend location-aware, real-time data dashboards and analytics
  - Enable information access and transactions anywhere, anytime, via any device

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Closing thoughts

- **What lessons have you learned?**
  - Technology may be the easy part, but …
  - Performance testing that can be relied upon is hard to come by
  - Build an integrated support model from the beginning
  - Ensure that processes and tools are available for policy compliance
  - It is easier to design complex security models than it is to sustain them
  - Day-to-day support is required over a long period of time
  - Enterprise ***x*** is hard …
- **What is required to succeed?**
  - Performant, reliable technology … part of the critical infrastructure
  - Diverse feedback channels
  - Governance: executive support, value chain engagement, individual accountability
  - Perseverance, patience, …

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The Power of

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Marathon SharePoint 2010 Environment

- **Enterprise Service Farm**
  - 7 Application Servers, 1 SQL Cluster
    - *User profile, Web Analytics, Secure Store Service, Business Data Connectivity, Managed Metadata, Search Content, Query Service*
- **Collaboration Farm**
  - 10 Web Front Ends, 7 Application Servers, 5 SQL Clusters
    - *Excel Services, State Services, Usage and Health, Office Web Applications, Word Automation Service, Query App, Custom Job Application, Sandbox Solution, Search Index Crawler*
- ***FAST Farm (future)***

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