PTC

Using XaitPorter, PTC produced more consistent tenders in half the time.

Who is PTC?

PTC is a leading developer and supplier of premium gas lift and wellhead products that enhance well integrity, safety, reliability and productivity for oil companies. The company has a large, patent-protected product portfolio developed in response to specific needs identified by clients.

Providing unique gas lift, chemical injection, and annulus integrity enhancement and management equipment, PTC helps oil and gas production companies address two of their biggest challenges:

- Increasing well uptime and production
- Assuring and enhancing well integrity

PTC has 125 employees and is headquartered in Stavanger, Norway, with sales offices in Bergen (NO), Aberdeen (UK), Houston (US), Rio de Janeiro (BR), Abu Dhabi (UAE) and Macae (BR).

Shawn Le Maitre, Sales & Marketing Manager at PTC, talks about how they have leveraged XaitPorter to produce consistent tenders globally, cutting their time spent on proposals in half.

The challenge: Files, files everywhere...

For their tender production, PTC depended on 'the usual suspects' when it comes to less-than-optimal processes. *Drumroll*, please... Word and Excel.

Anyone who has worked with Word much at all knows how frustrating it can be getting formatting just the way you want it. With high-stakes business documents, this is doubly so.

There's nothing quite so frustrating as trying to fix section problems in Word or trying to fix an issue with styles after

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the document has been going back and forth between the project manager, the team lead and the content writer.

Says Shawn Le Maitre:
– Creating hundreds of 1000-page tenders using Word and Excel was cumbersome, to put it mildly. First, we had to get all the different documents cobbled together somehow. Then we'd typically spend at least a day and a half getting the formatting right, after five team members had been working in silos, generating five different document versions.

The manhours kept adding up:
– As the documents grew in size and we had to split them up into several pieces, things started to go awry. Pagination, graphics, layout… Fixing something in one place would cause something else to change in another. It was a mess, plain and simple. What's more, we'd spend hour upon hour painstakingly going back and forth fixing issues before we could print. Typically, one and a half workday would go to waste each time.

Eventually, PTC realized they needed to move beyond Word.

The solution: the database-driven XaitPorter

In a previous position, with one of the world's biggest oilfield services companies, Le Maitre had been using XaitPorter to create proposals.

– So we approached Xait and entered into an agreement with them. We started using XaitPorter, and things just worked out from day one, without a hitch.

What has the onboarding process looked like for Le Maitre and his team?
– Initially, when you start using the system, you have to basically set up your template and go through that learning curve. But once you do one tender, your second one will take half the time, and then your third one will probably take a quarter of the time.

Before long, Le Maitre says, you'll see considerable time savings:
– By using ready-made templates that fit in seamlessly with the rest of the document. as well as previously approved and vetted content, you're able to produce tenders much faster… and with a lot more control. This isn't possible when at the mercy of Word. Simply put, the more tenders you create using XaitPorter, and the more you get used to the system, the more streamlined your process will be.

Results: 50 % time savings

Automatic formatting has transformed PTC's proposal creation processes. They no longer have to worry about spending a whole day or two on bullets and tables and diagrams.

Le Maitre explains:
– We save at least 50 percent, probably more, of the time we would normally have to spend on our proposals. I think I've literally done ten tenders in the last 12 months, and all of them are concurrent, some of them had deadlines that were within days of each other. I would never have been able to do that without using XaitPorter, unless I had hired probably two additional people to help me put the tenders together.

If the Sales & Marketing Manager was to identify the single most important benefit that Xait brings for his proposal team, what would that be?
– Without doubt, getting the format right and being able to produce a consistent document indexed properly with the right fonts, the right layouts, the right templates.

Changes made are saved as they are written, so the document we're working on is always the most recent version.

– And secondly, being able to collaboratively work with colleagues that are in Abu Dhabi or Brazil or the US to put that document together.

Moreover, Le Maitre and his coworkers love being able to co-author in one single document:
– Back in our Word days, people would write something in the document they were working on, and then they would email the file. Another person then had to import it into the main document. Being able to work in parallel saves us a lot of time. But for me personally, not having to struggle with formatting issues is the biggest win in terms of time savings.

The smarter way of working to win more business

Word was never intended to be a collaborative tool. Using a normal word processor to create professional proposals or similar business documents, your team will lack control, battle with formatting and end up with a large 'Frankenstein' document. When push comes to shove, they will struggle to meet their deadline, as the task of creating a large document is simply too complex.

In a co-authoring and automation solution like XaitPorter, tables, macros and forms are all stored in the database, available every time you or your team accesses it. For PTC, this was a blessing:
– If you've ever used Word with a document that's over a hundred pages, it becomes extremely difficult to format, do indexing or anything with it. I used to spend literally days trying to get documents ready for tenders.

Shawn Le Maitre wraps it up:
– To win more business in a fiercely competitive marketplace, you need to do things smarter than before. Using Xait is a smarter way of doing things. I would definitely recommend Xait Porter to other companies.