

# TETRA Technologies Selects KloudGin Platform as Single Face Of Work<sup>®</sup> for Field Service and Asset Management

Increases efficiency of field operations and achieves real-time visibility to all types of work and financial data



Headquartered in The Woodlands, Texas, TETRA is a global company with employees and operations on six continents. Tetra products and services are delivered through two business divisions — Completion Fluids and Products and Water and Flowback Services.



## QUICK FACTS

- 
 Reduced monthly close time from 10 days to 3 days through integration with JD Edwards
- 
 Decreased time to generate mobile POs by eliminating multiple data entry efforts
- 
 Field adoption of new technology was fast and easy with user-friendly KloudGin Mobile App
- 
 Configurable, no/low code platform – easy to make screen changes, add business rules, etc.
- 
 Low Total Cost of Ownership and easy to scale
- 
 Integration with accounting and payroll to speed up invoicing and generation of time sheets, while improving accuracy
- 
 Analytics and reporting for up-to-the-minute cross-functional visibility and analysis
- 
 Automates scheduling and planning of jobs, people, parts and equipment with easy dispatch of people and equipment to job locations
- 
 Management of complex multi-site service contracts and contract compliance

TETRA Technologies is a geographically diversified industrial and oil & gas products and services company focused on completion fluids, calcium chloride, water management solutions, frac flowback and production well testing services. Calcium chloride is used in the oil and gas, industrial, agricultural, road, food and beverage markets. TETRA is evolving its business model by expanding into the low carbon energy markets with its chemistry expertise, key mineral acreage and global infrastructure.

## SOLUTION SUMMARY

- ✓ KloudGin Asset Management Suite
- ✓ KloudGin Field Service Suite
- ✓ KloudGin Mobile App
- ✓ KloudGin Platform

## Challenge

TETRA had fragmented and manual processes for confirming delivery of materials and services at job sites and reconciling estimates to invoices, which took field management away from their day-to-day responsibilities. It also took weeks to create revenue forecasts because every region had a different forecasting process, and there was no visibility to financial data.

Relying heavily on excel spreadsheets and job books, field workers were tasked with collecting job data on services, workers, and equipment at client sites. The collected data was sent to the regional office for data entry into TETRA's ERP system, JD Edwards. The resulting Job Sheets were then sent to field managers to print and procure client signatures. Once signed, they were mailed to the regional office, attached to the final invoice and mailed to the client.

As part of the financial reporting process, regions were required to generate revenue forecasts based on the sales estimates and time-and-materials jobs occurring in the field. Each of the regions had their own process for generating invoices and forecasting revenue, leaving corporate finance to standardize forecasts.

When TETRA decided to increase the efficiency of its field operations and improve visibility to financial data, IT Business Architect, Mary Fuller Breland, was excited to take on the project from initial scoping, process design and vendor selection to initial implementation and rollout across all the regions.

## Solution

TETRA knew they needed to standardize processes across regions, reduce the amount of manual interaction, and give their workers, clients and contractors a modern, unified system that was rugged, easy-to-use and scalable. The project would also require complex integrations into JD Edwards for real-time updates to the financial system and Dell Boomi to create a single signon (SSO) experience for users. Equally important, they wanted a partner that could grow with the future needs of their business.

After evaluating a competitive field of suppliers, including major providers to the Oil & Gas industry, TETRA chose KloudGin. Offering a configurable platform built for both field services and asset management, KloudGin provided the solution TETRA required for today and future expansion. KloudGin also had proven success with integration to JD Edwards and Dell Boomi .

KloudGin's "Single Face of Work<sup>®</sup>" was a critical differentiator as TETRA planned a future with a single system for POs, work orders, equipment maintenance, item maintenance, inventory, and field service management with multi-country deployment across six continents.

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*Having a single face of work gives TETRA visibility to work, workers and resources unlike anything we could achieve with manual processes and siloed systems. With KloudGin, we have a scalable and nimble platform to support our future growth.*

MARY FULLER BRELAND | IT BUSINESS ARCHITECT | TETRA TECHNOLOGIES

## The Results

Following the KloudGin implementation, TETRA now has real-time visibility to all types of work and financial data and the administrative burden on their field team has been dramatically reduced.

Field crews can enter work orders, track work, create Job Sheets and secure client signatures all from their mobile device in the field. TETRA has full visibility to estimates, jobs, work completed and proforma invoices, which are all integrated with JD Edwards, making final invoicing easy and accurate.

### FIELD CREW TECHNOLOGY TRANSFORMATION

Despite a workforce unused to working with technology and an entrenched paper process, KloudGin's rugged application and easy user interface required minimal training and resulted in high (90+%) in-field adoption. Breland explained, "Adoption of new processes and technology in the field is always a risk, particularly with employees who have longevity with the company and are comfortable doing things a certain way. The KloudGin user interface made the transition incredibly easy for our field workers, not only to come up to speed quickly, but also to realize the benefit of the new processes. Now they are excited to be using modern technology."

### INCREASED FIELD EFFICIENCY

KloudGin's embedded AI features enable field workers to work offline with access to the mobile app features and relevant data, while syncing automatically once they are back online. Crews also appreciate the ability to

complete digital forms for incident reports, failure reports and job safety analysis along with collection of physical and electronic signatures on the daily tags or delivery tickets.

### PLATFORM FLEXIBILITY

KloudGin's configurable, no/low code platform put TETRA in control of screen and form design, as well as changes to data entities, business rules, and workflow to accommodate different work processes.

### RAPID DEPLOYMENT

Within months of project scoping, KloudGin was deployed to the first region including process automation, systems integration, mobile technology procurement, and employee training. Deployment times decreased progressively as other regions were implemented. Breland commented, "KloudGin is not only easy to use, but also to implement. After KloudGin's support during the initial launch, my team was able to roll out the platform to the remaining regions at a rapid pace."

## ABOUT KLOUDGIN

KloudGin is a trusted provider of the only combined, one-cloud, industry-focused mobile field service, work and asset management solution that connects customers, employees, and assets using AI-powered access to information, on any device.

For more information visit  
[www.kloudgin.com](http://www.kloudgin.com)



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