



accenture

High performance. Delivered.

Microsoft®

**Microsoft and Accenture Oil & Gas
Collaboration Survey 2010**

Microsoft Global Energy Forum 2010

January 2010

Methodology



- Second Oil & Gas Collaboration Survey funded by Microsoft Corp. and Accenture
- Online survey of 275 oil and gas industry professionals including engineers, geoscientists, mid-level and executive management, business unit heads and project managers from a cross-segment of the industry
- Conducted in October 2009 by Tulsa, Okla.-based PennEnergy in partnership with the Oil & Gas Journal Research Center

Definitions



For this survey, we defined collaboration and social media as the following:

- ▶ Collaboration: to interact with colleagues both inside and outside an organization either in person, by phone, by computers or other electronic means to get your day-to-day work accomplished.
- ▶ Social media: software that contributes to compelling and effective social interactions. The technology often associated with social media includes blogs, wikis, social networks, podcasts, instant messaging and micro-blogging.

High-Level Trends



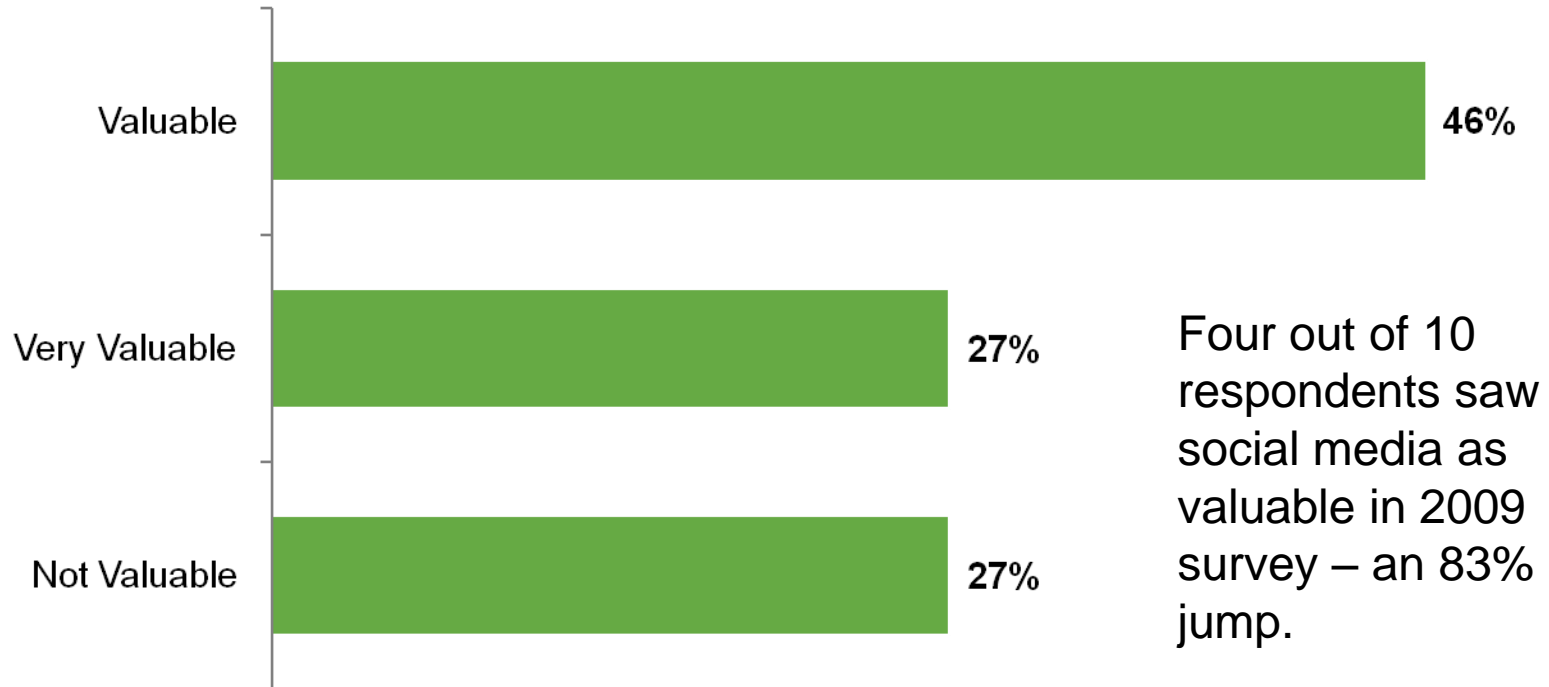
- Professionals are seeking new ways to collaborate through social media and collaboration technology – 73% of respondents see business value.
- The stated benefits of social media include improved productivity and work performance, work flexibility and completed projects on time and within budget.
- Most are using social media to build and strengthen professional relationships and document and transfer knowledge.
- Although most surveyed are on board with social media for business use, corporate-wide adoption still lags.

High-Level Trends



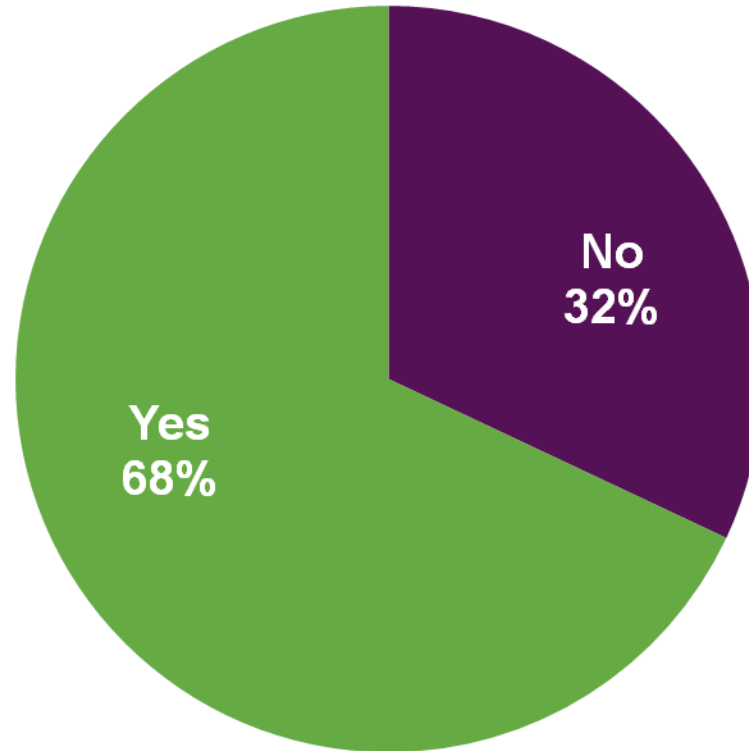
- Only 11% of social media adoption is driven by the executive suite.
- Existing company policies are impeding mainstream adoption.
- Security is the most often cited factor in delaying company adoption. 39% are concerned about social media's ability to control or secure collaborative environments; 74% have security policies in place.
- Adoption is driven primarily by individual work groups and teams (24%) – those collaborating most to get the work done.
- Collaboration is an integral part of oil and gas professional's daily work environment; industry trends and workplace dynamics are shaping the need to collaborate even more.

Professionals Rapidly Embracing Social Media and Collaboration Tools for Work



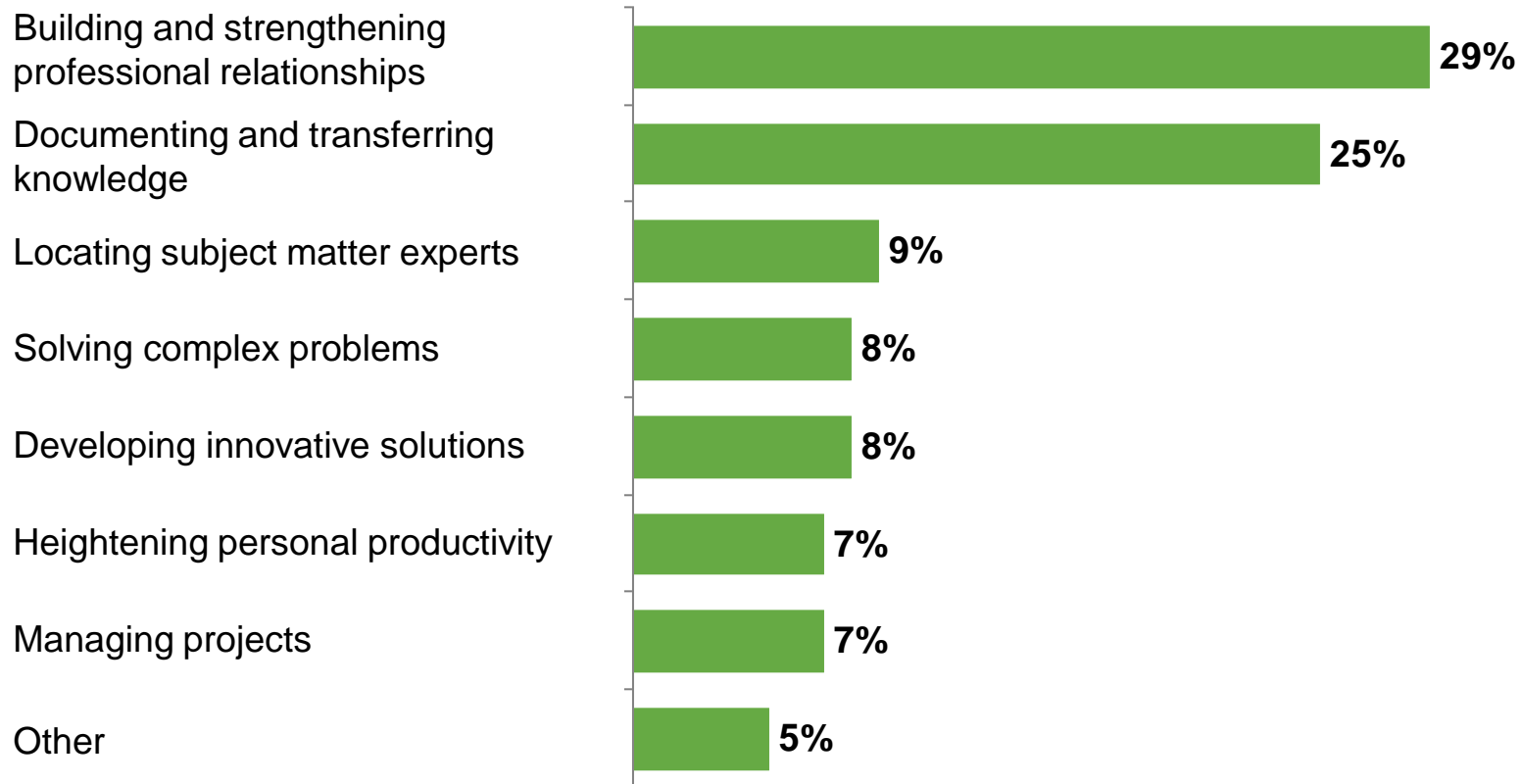
How valuable do you think these social media tools listed above are for work at this time?

Majority Say Social Media Improves Work Performance



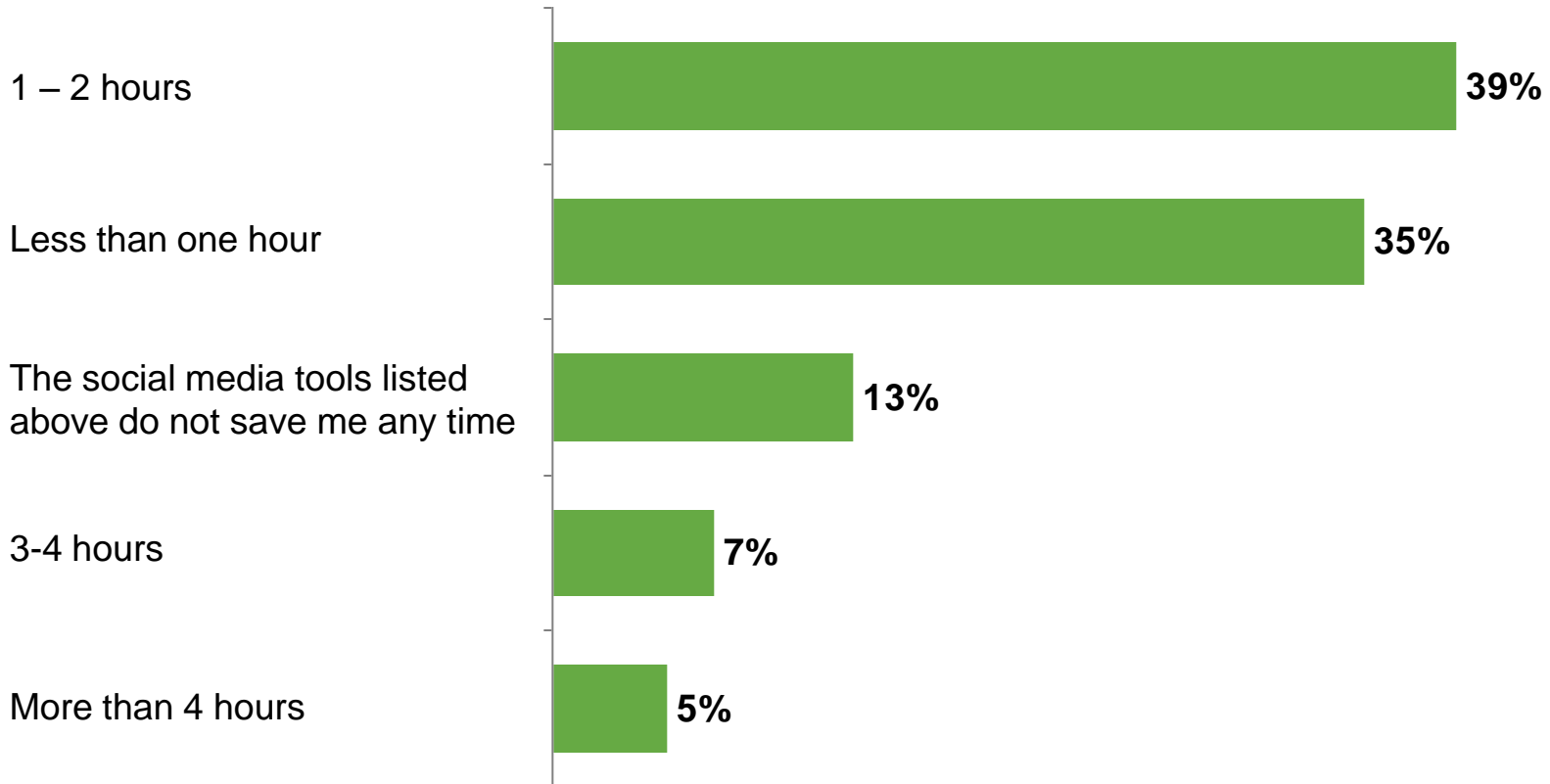
Do social media tools help improve your work performance?

Most Business Value Seen in Connecting Professionals, Transferring Knowledge



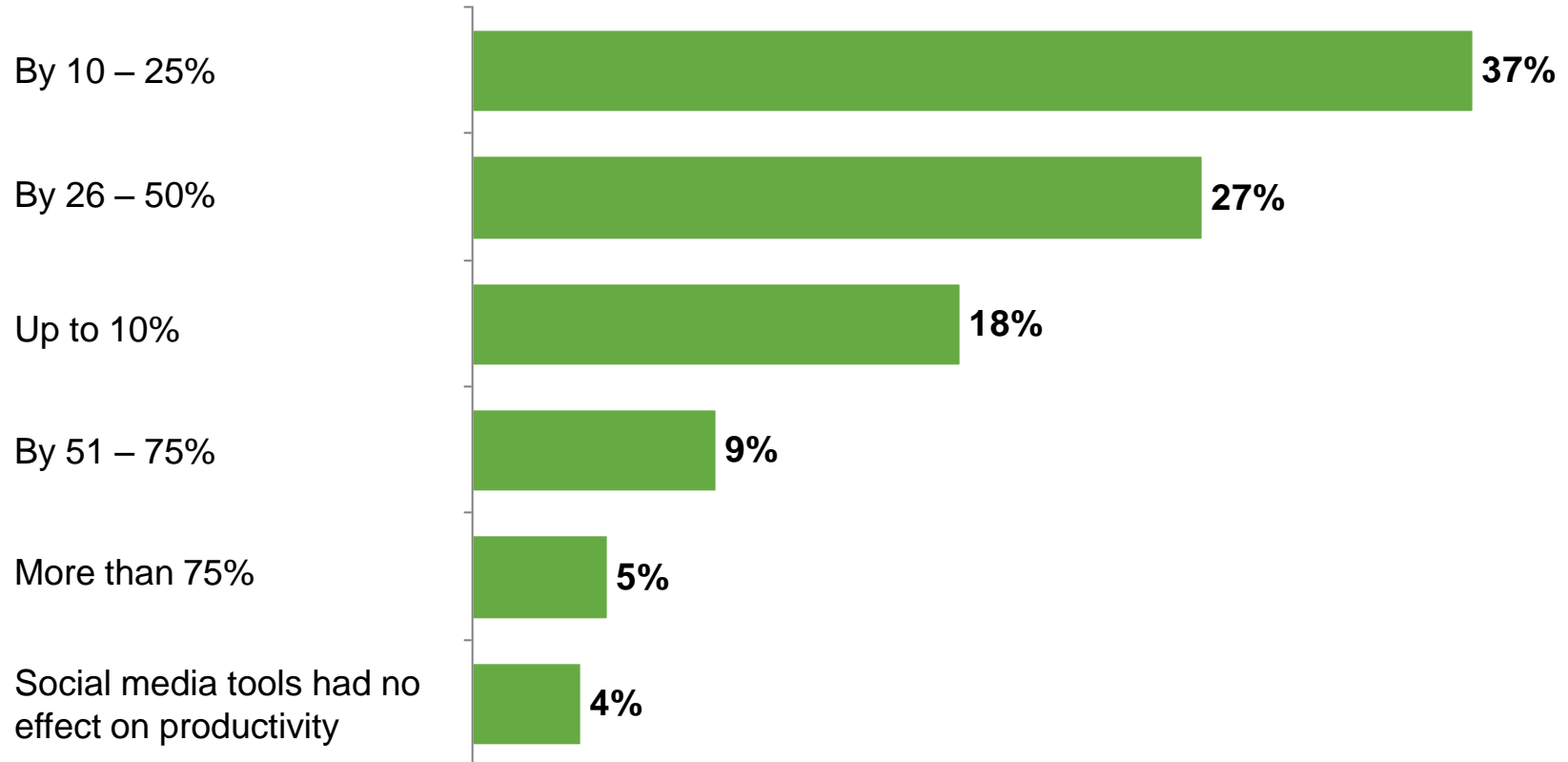
Where do you think social media tools overall provide the most business value? (Select one)

Over One-Third Report Saving 1-2 Hours Per Day With Social Media



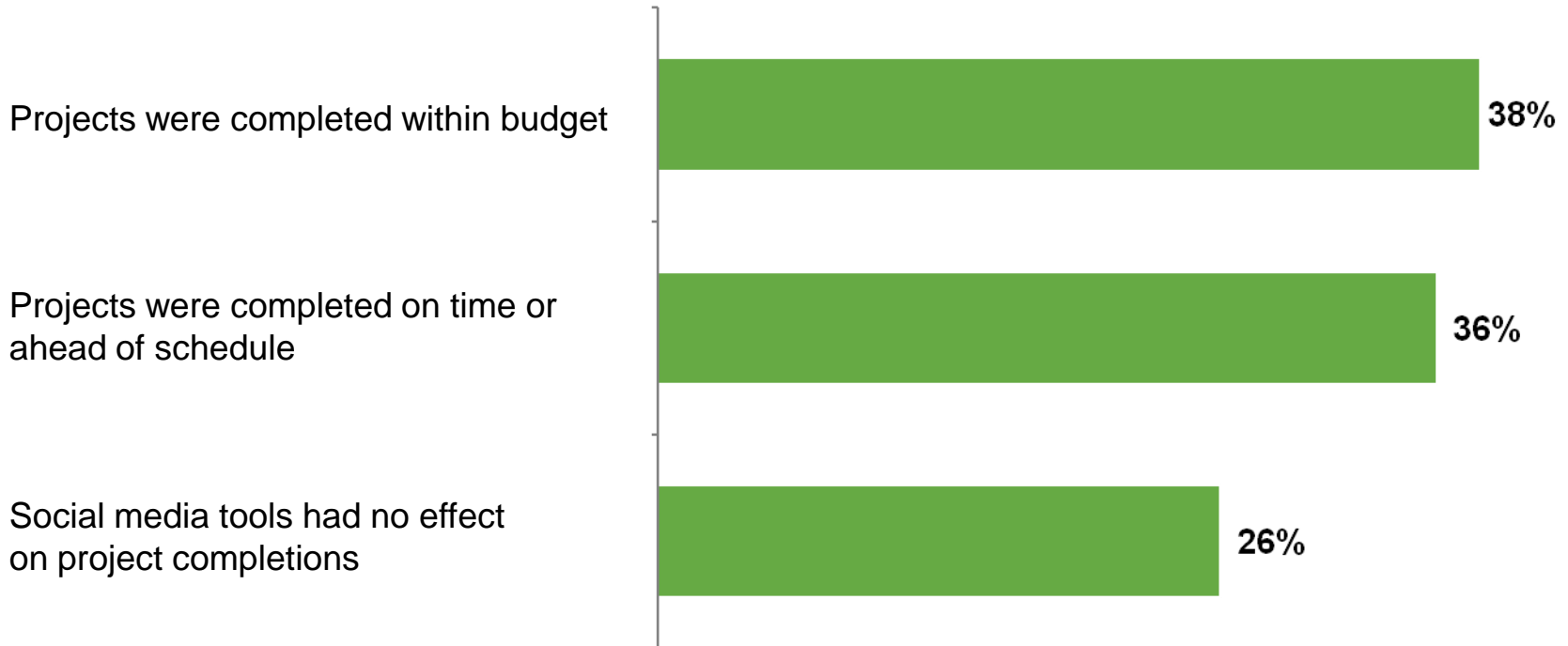
How have social media tools affected time saved per day?

Most Cite Significant Productivity Gains



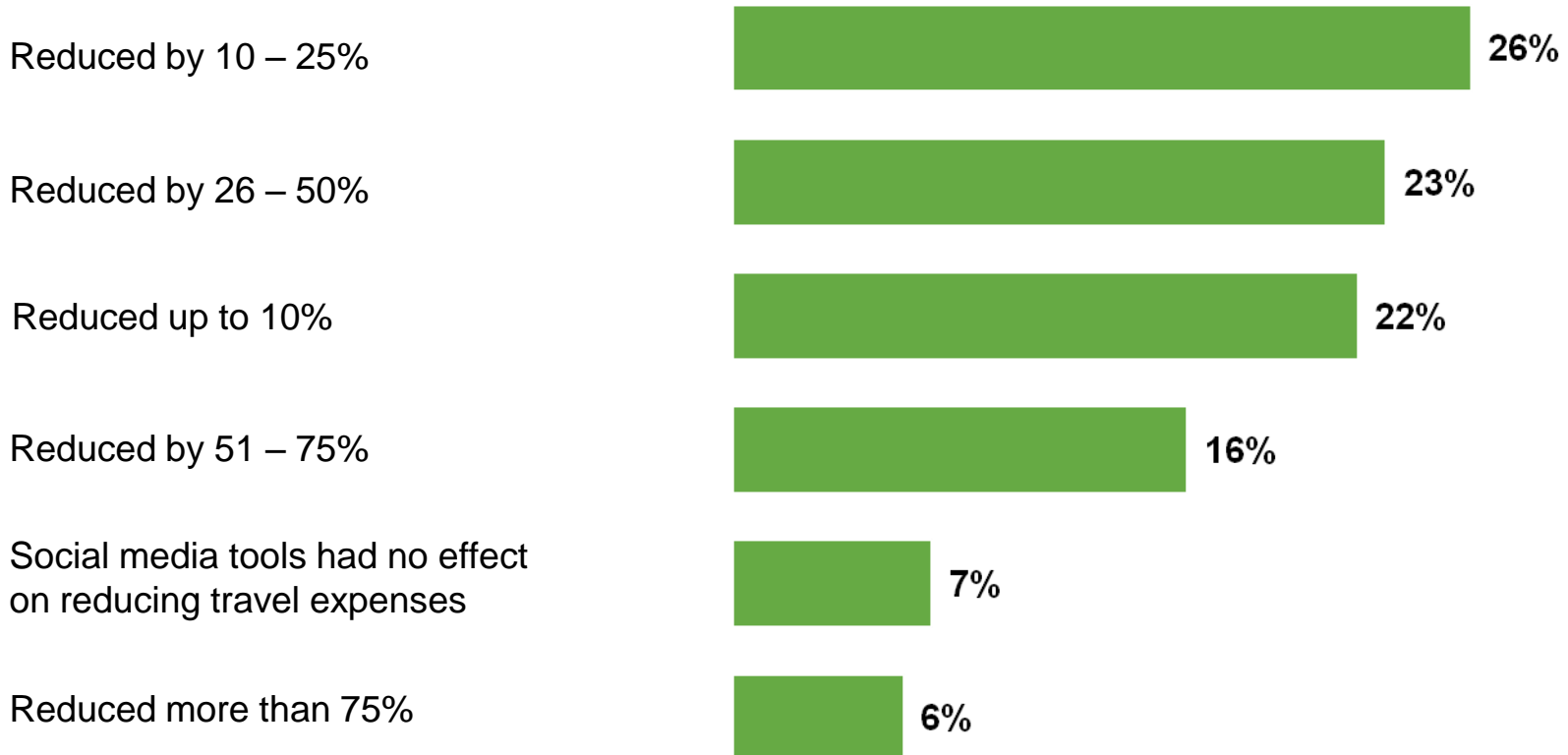
How have social media tools directly improved productivity?

Social Media Helps On-Time, Within Budget Project Completions



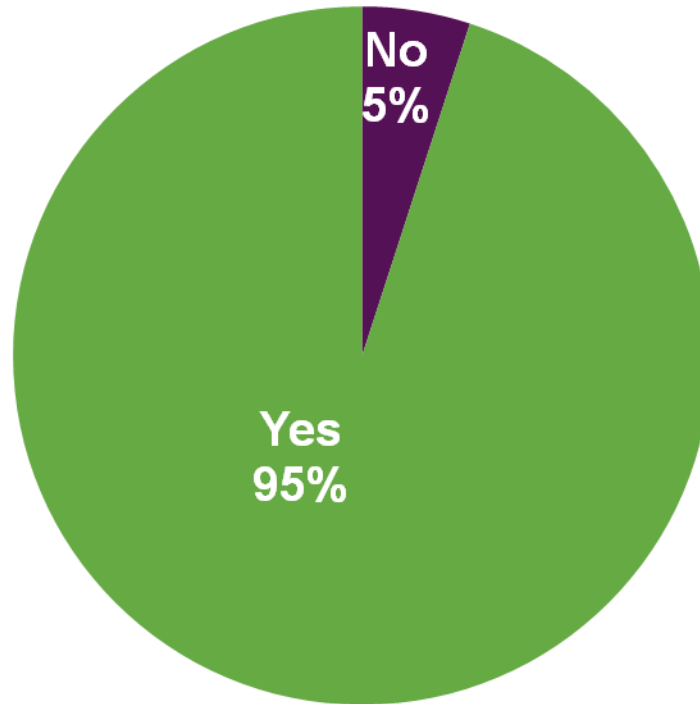
How have social media tools directly affected project completions?

Many Report Significant Travel Expense Savings



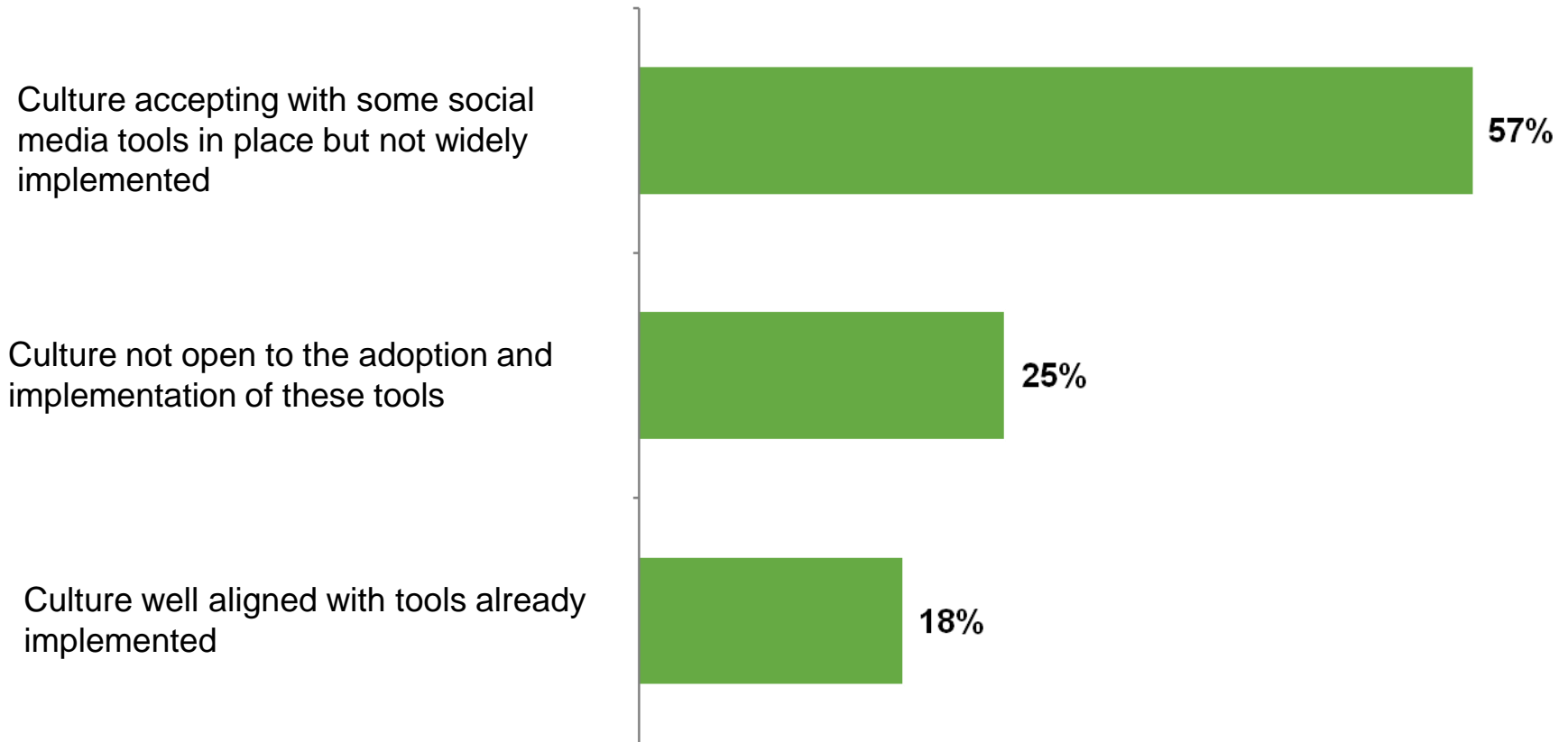
How have social media tools reduced travel expenses?

Most Say Social Media Provides Work Flexibility



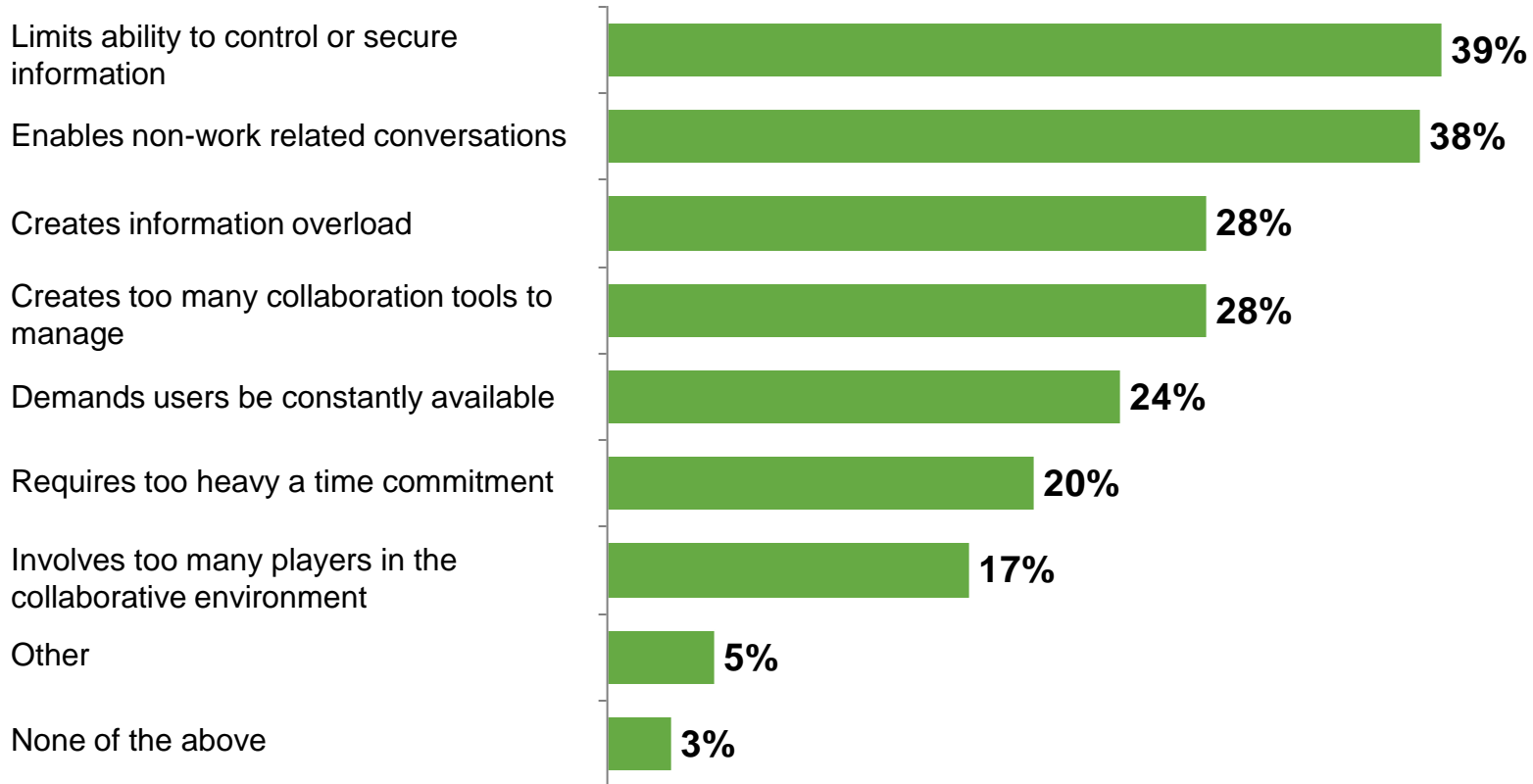
Does social media offer flexibility to work anywhere and anytime, the way you want to work?

Corporate Endorsement of Collaboration Technology Still Lags



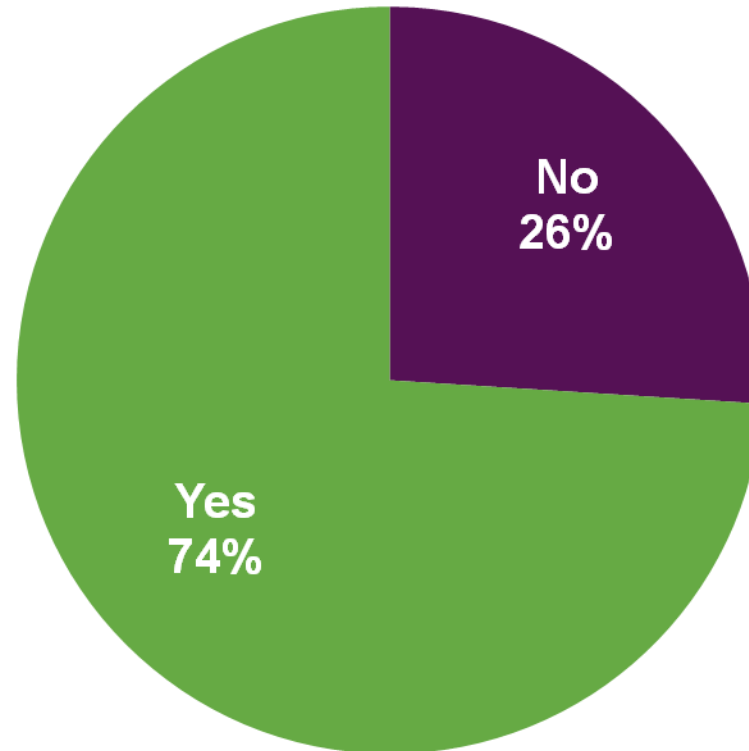
How well do you think your corporate culture supports the adoption of social media tools at this time?

Security, Information Control Challenges Are Top of Mind



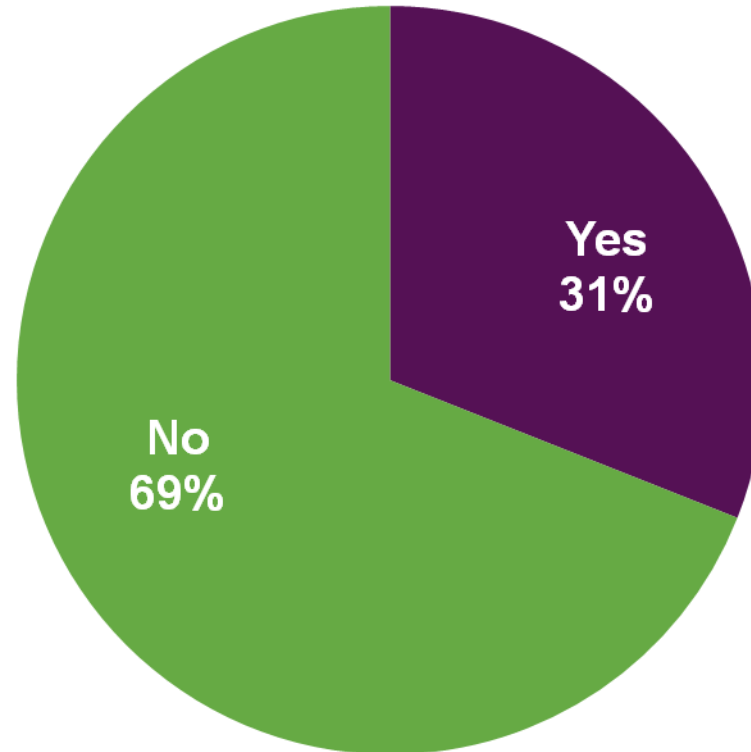
What challenges do you see to using social media at work?
(Select your top three, if appropriate)

Most Companies Have Social Media Security Policies...



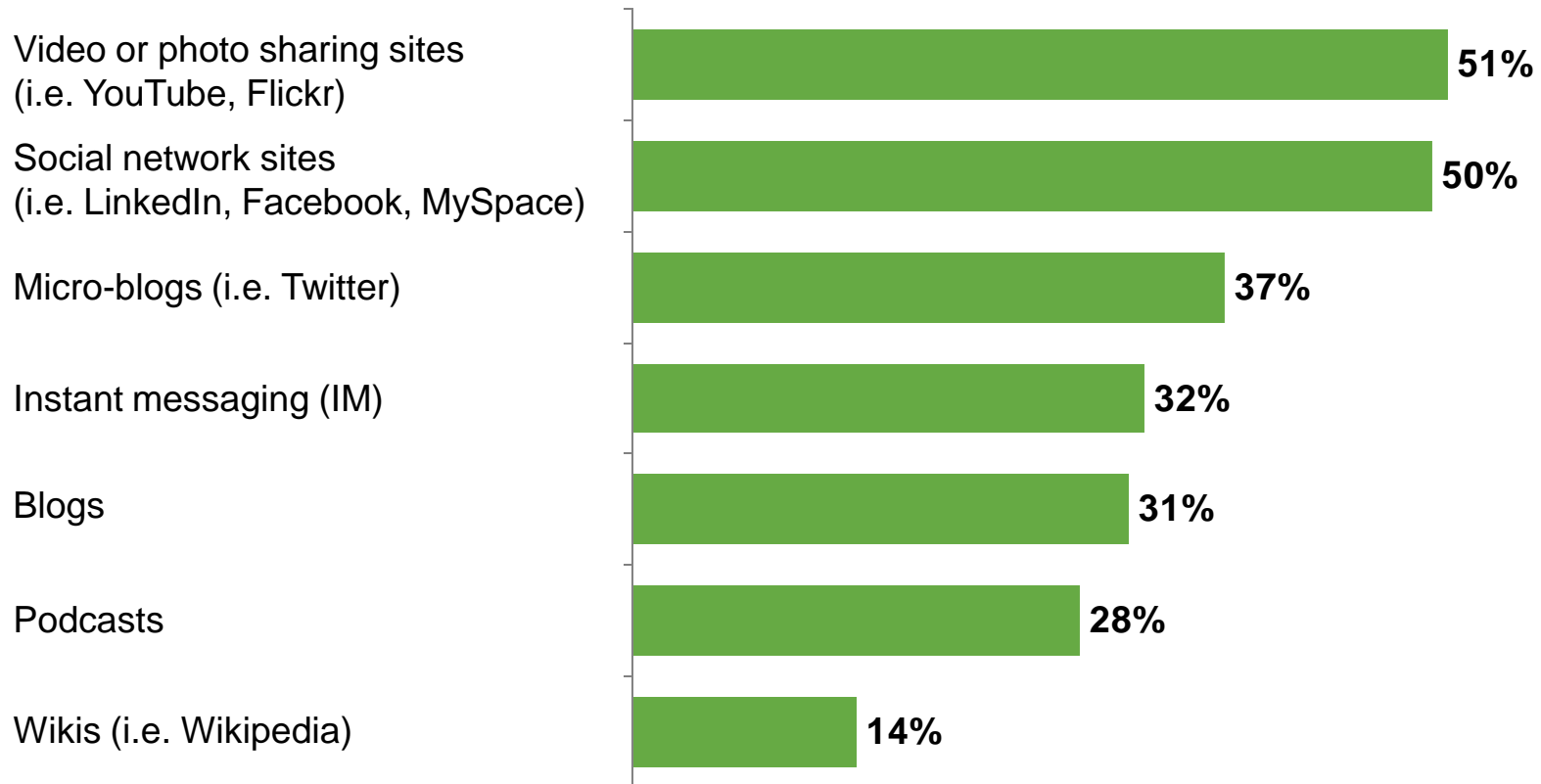
Does your company have information security policies for using social media in place at this time?

... but Few Offer Training Programs



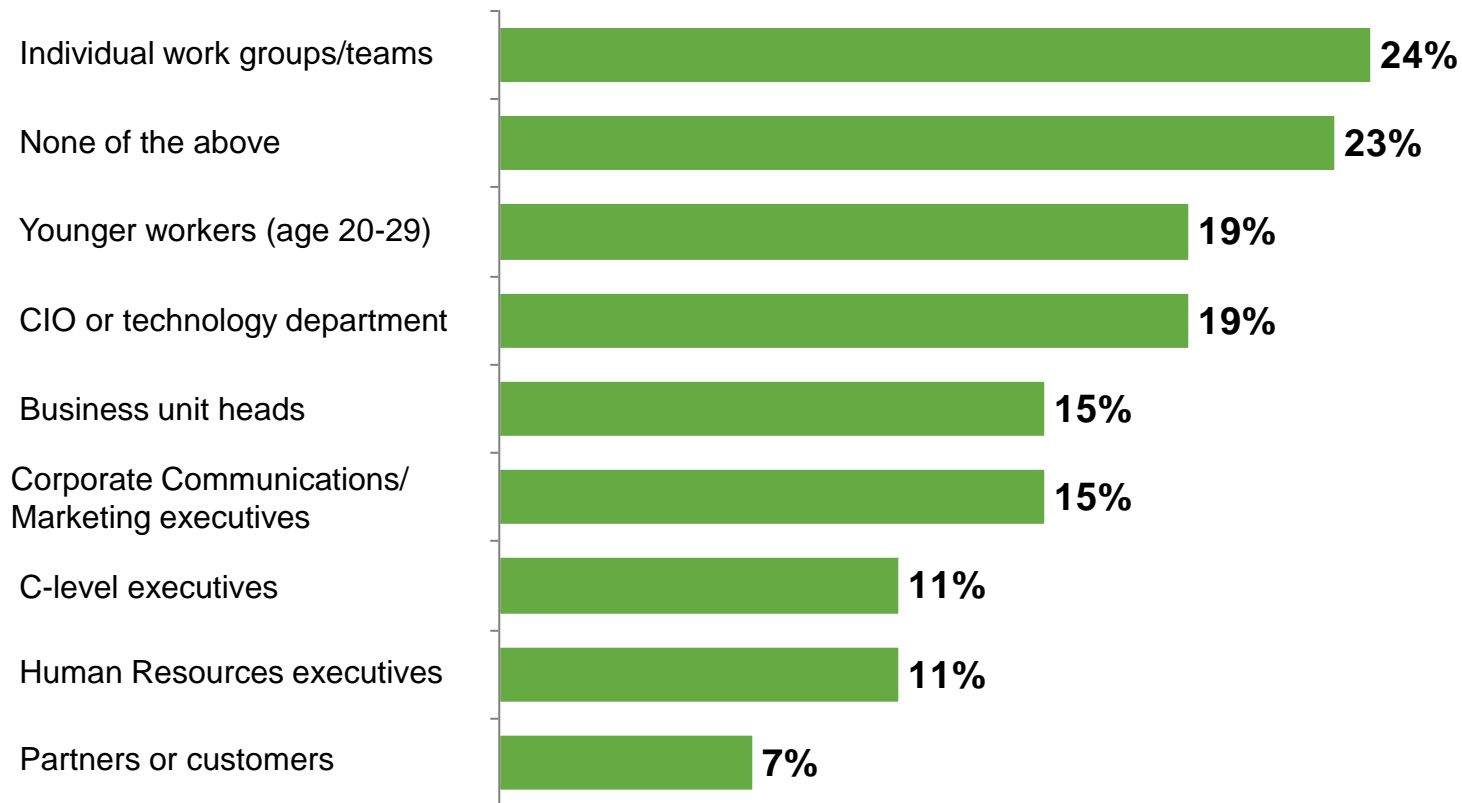
Does your company have an employee training program on the appropriate uses for social media for work?

Many Companies Prohibit External Social Media Use



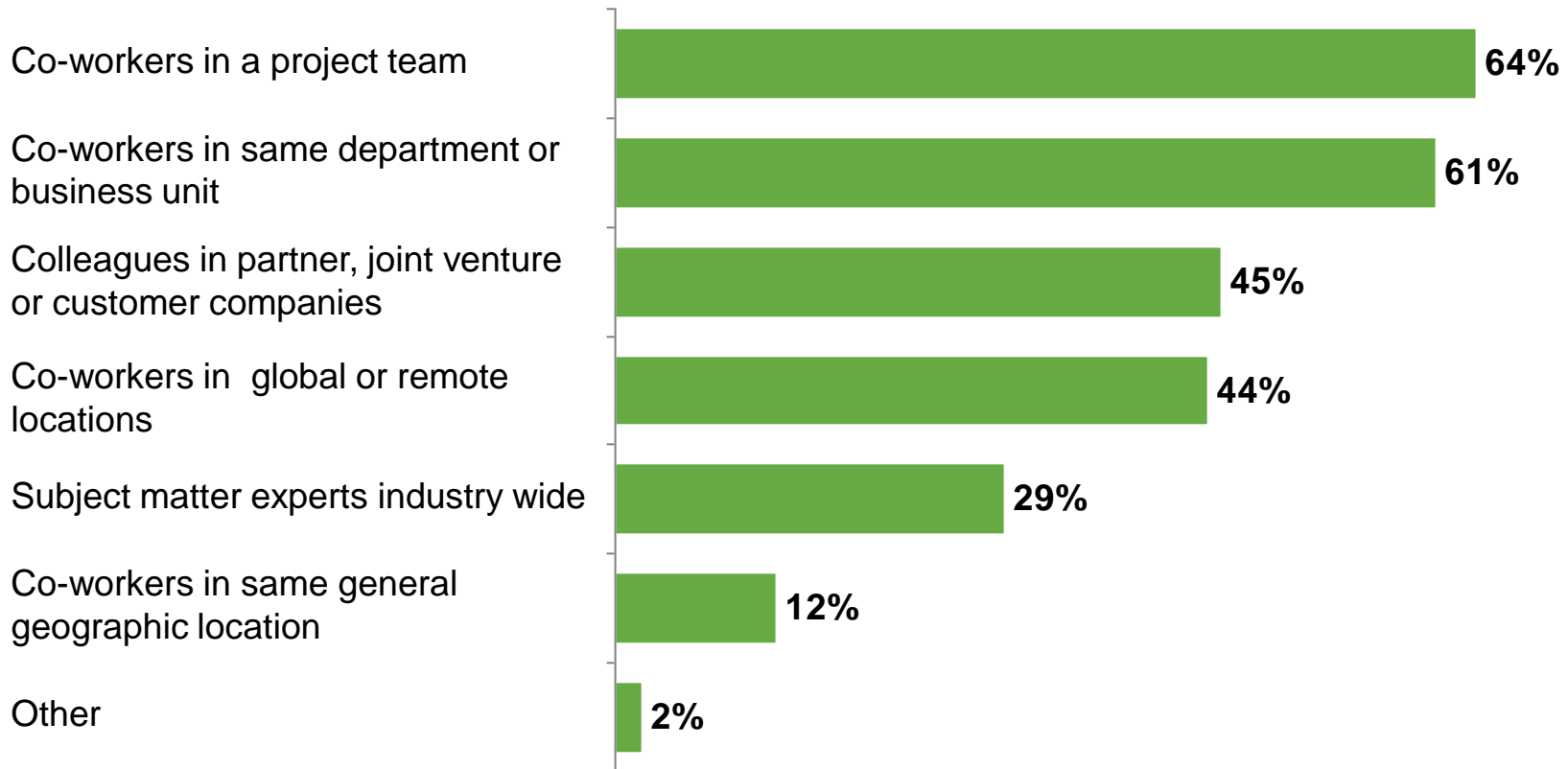
Does your organization prohibit employees from using any of the following external social media tools for work? (Select all that apply)

Social Media Adoption – a Grassroots Effort...



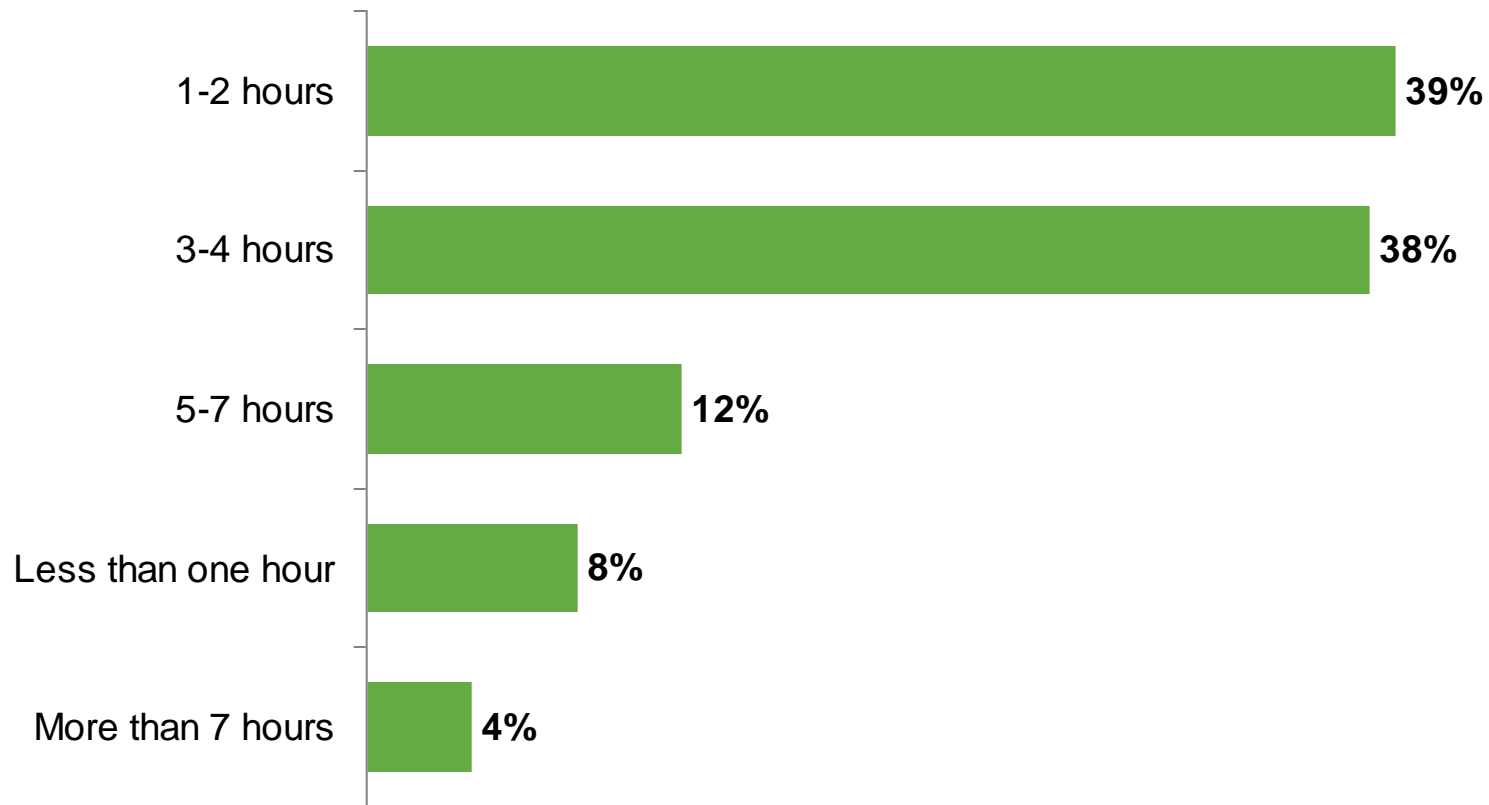
Who is driving the adoption of social media in your organization? (Select all that apply)

... By Project Teams and Business Units Who Collaborate Most



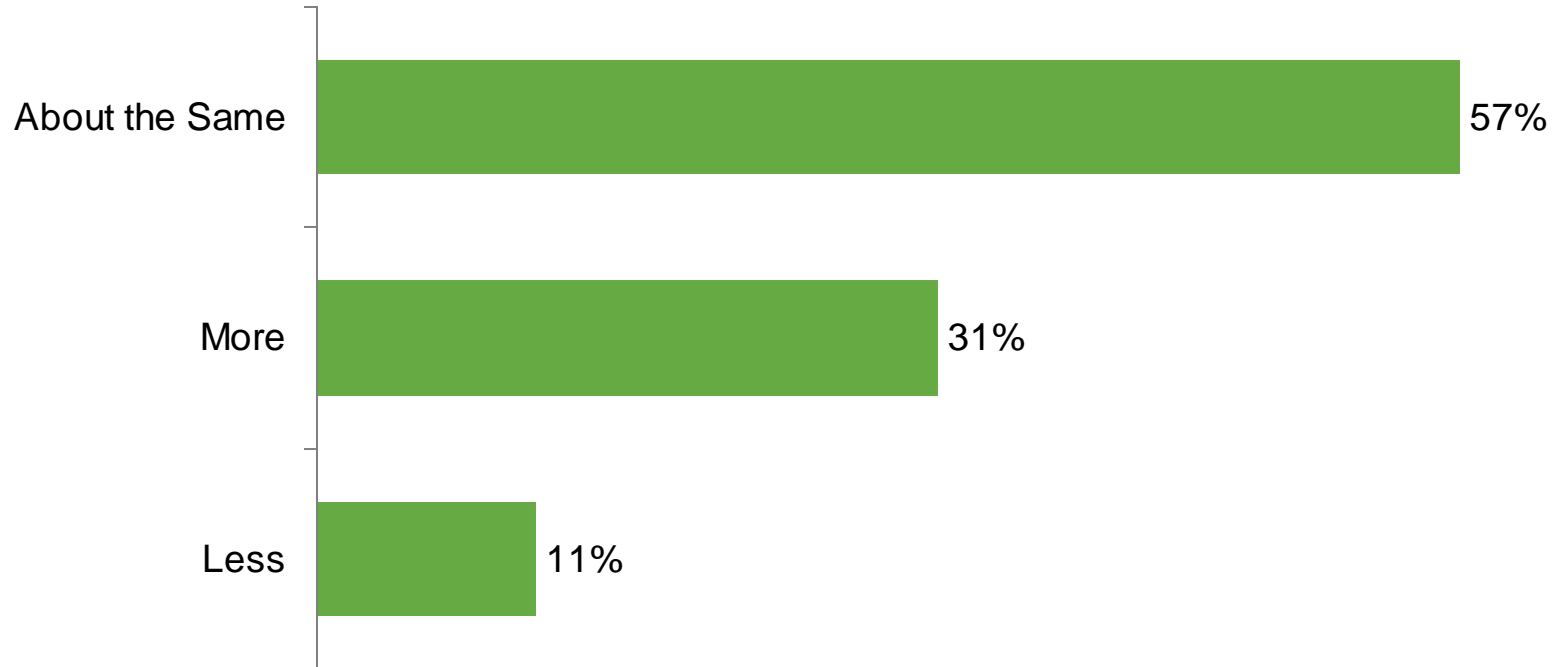
In your daily work, with whom do you most often collaborate? (Select your top THREE)

Most O&G Pros Spend Hours Each Day in Collaboration



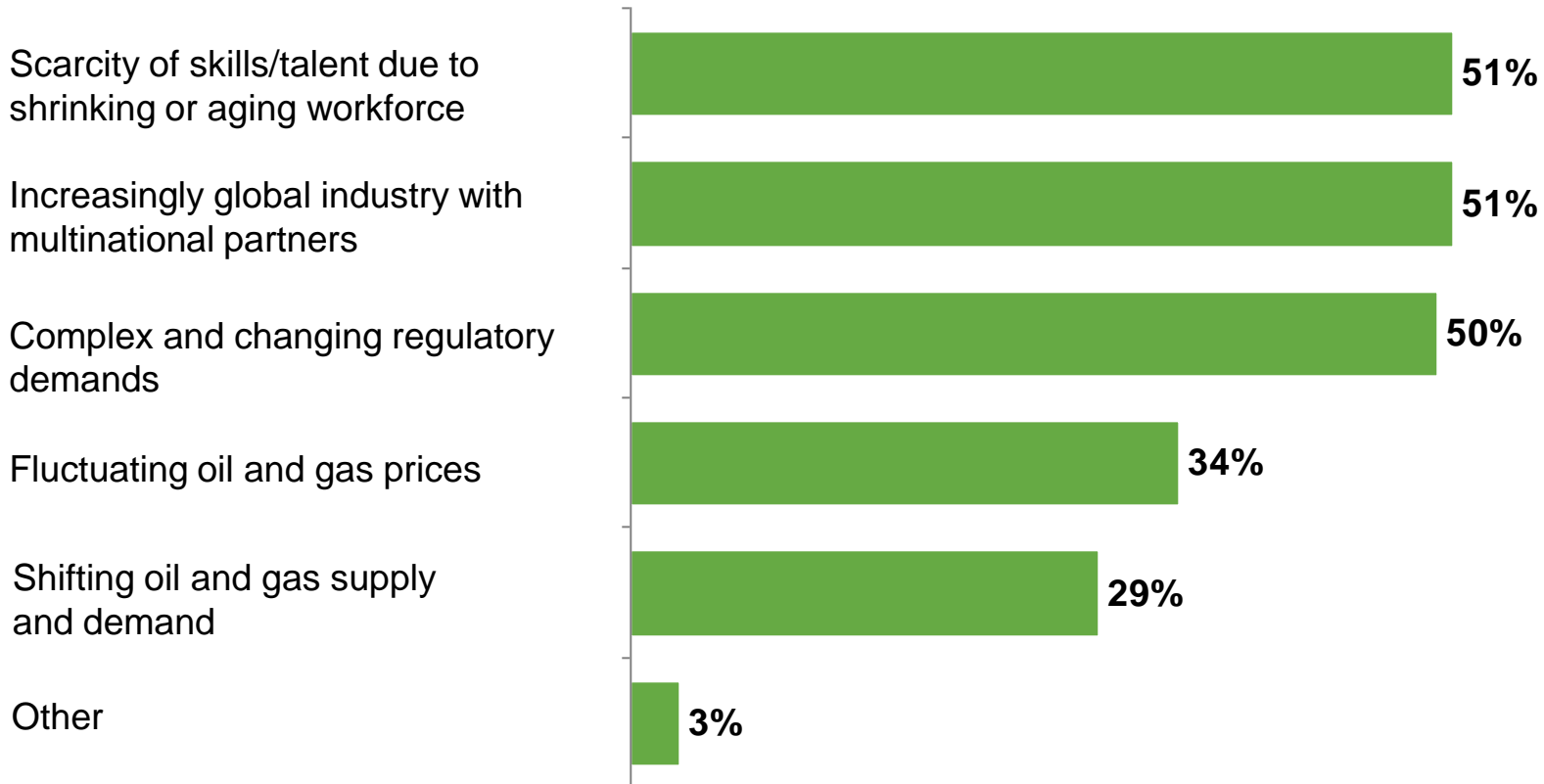
How much of a typical work day do you spend collaborating with others to get your job done?

31% Collaborating More Than Last Year



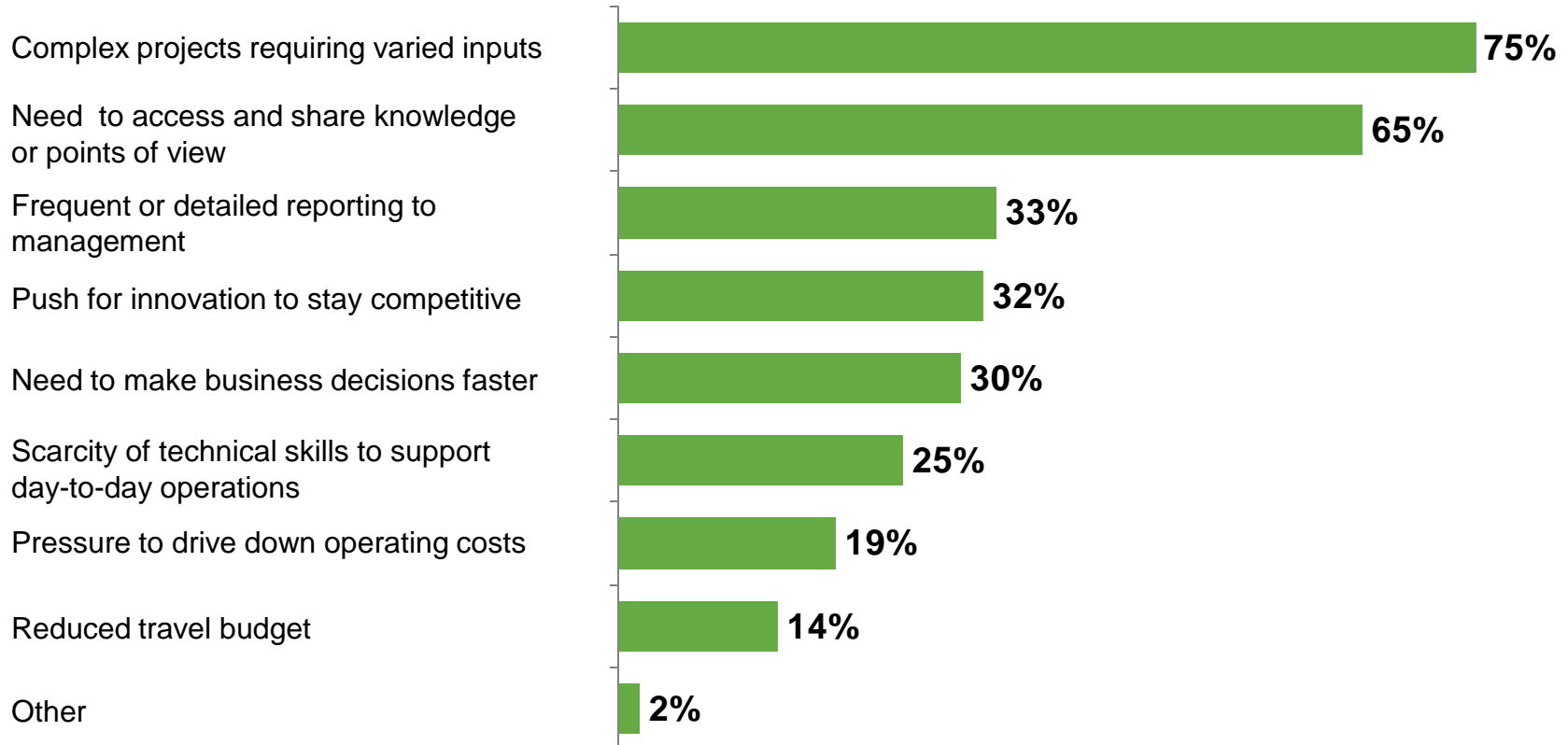
How does this compare to the amount of time you spent collaborating with others one year ago?

Industry Trends Driving Need to Collaborate...



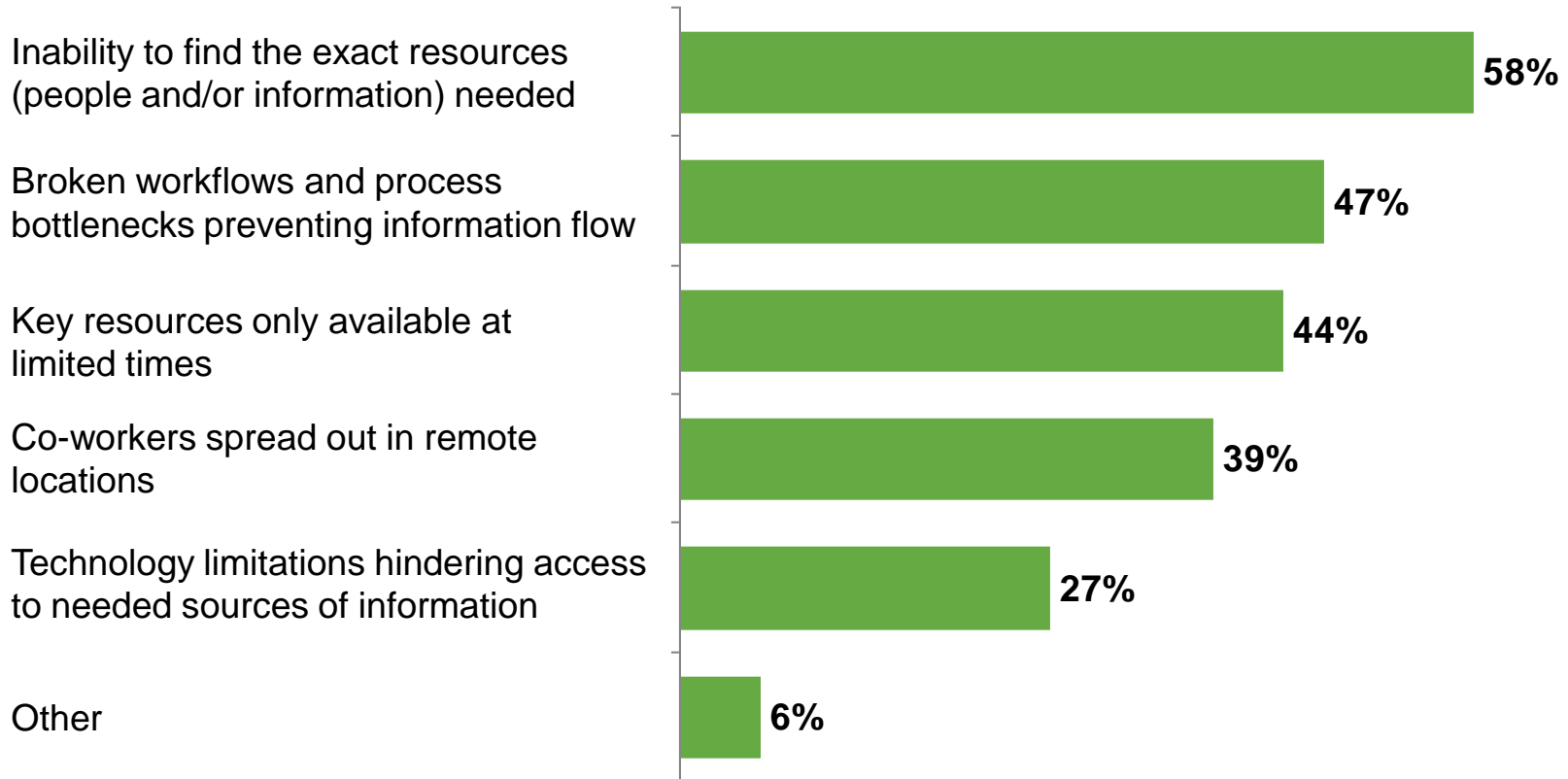
Do any of the following global industry trends drive your need to collaborate? (Select your top THREE)

... as well as Workplace Dynamics



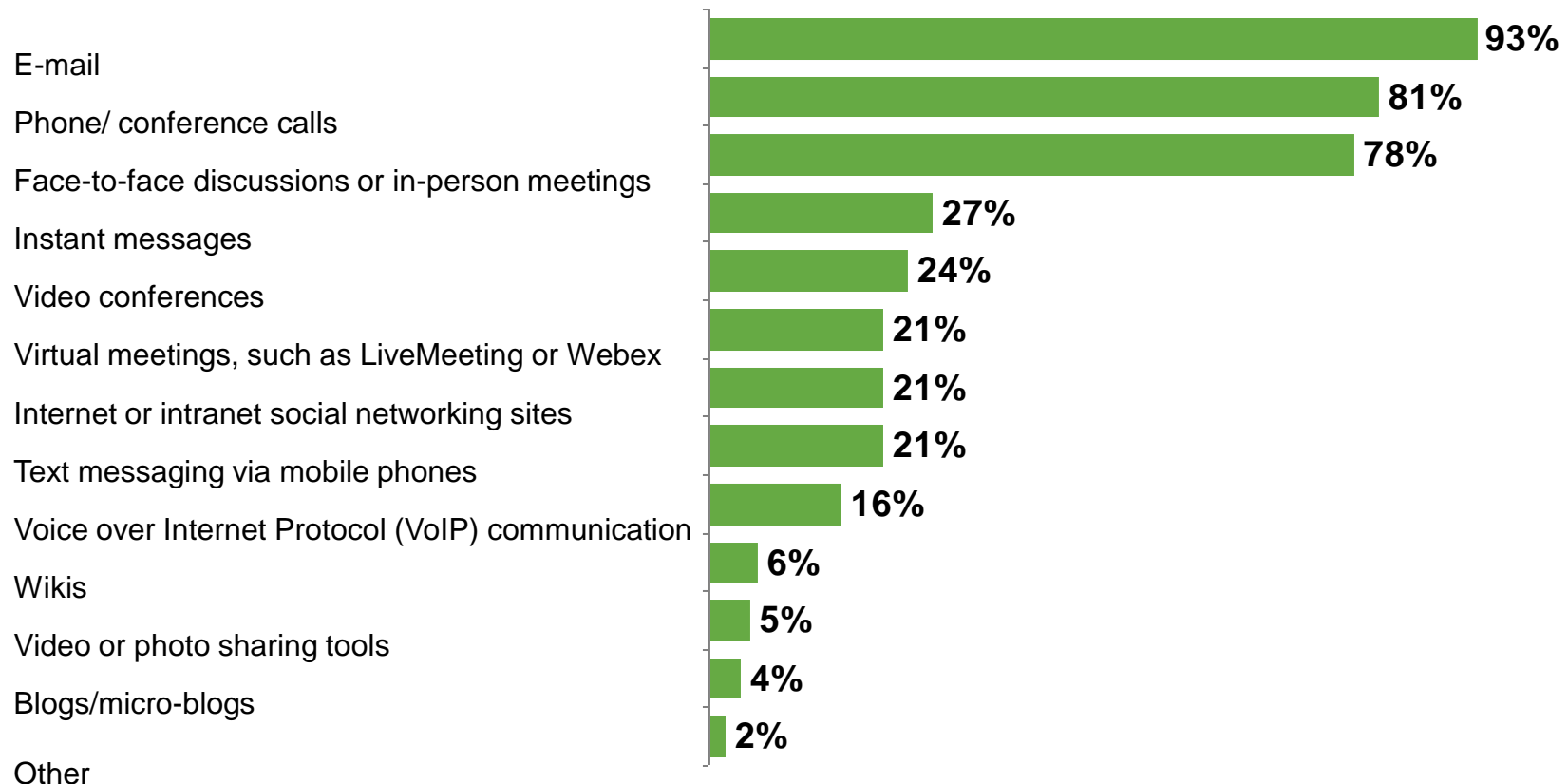
What workplace factors are driving your need to collaborate?
(Select your top three)

Inability to Access People, Information Is a Barrier to Effective Collaboration



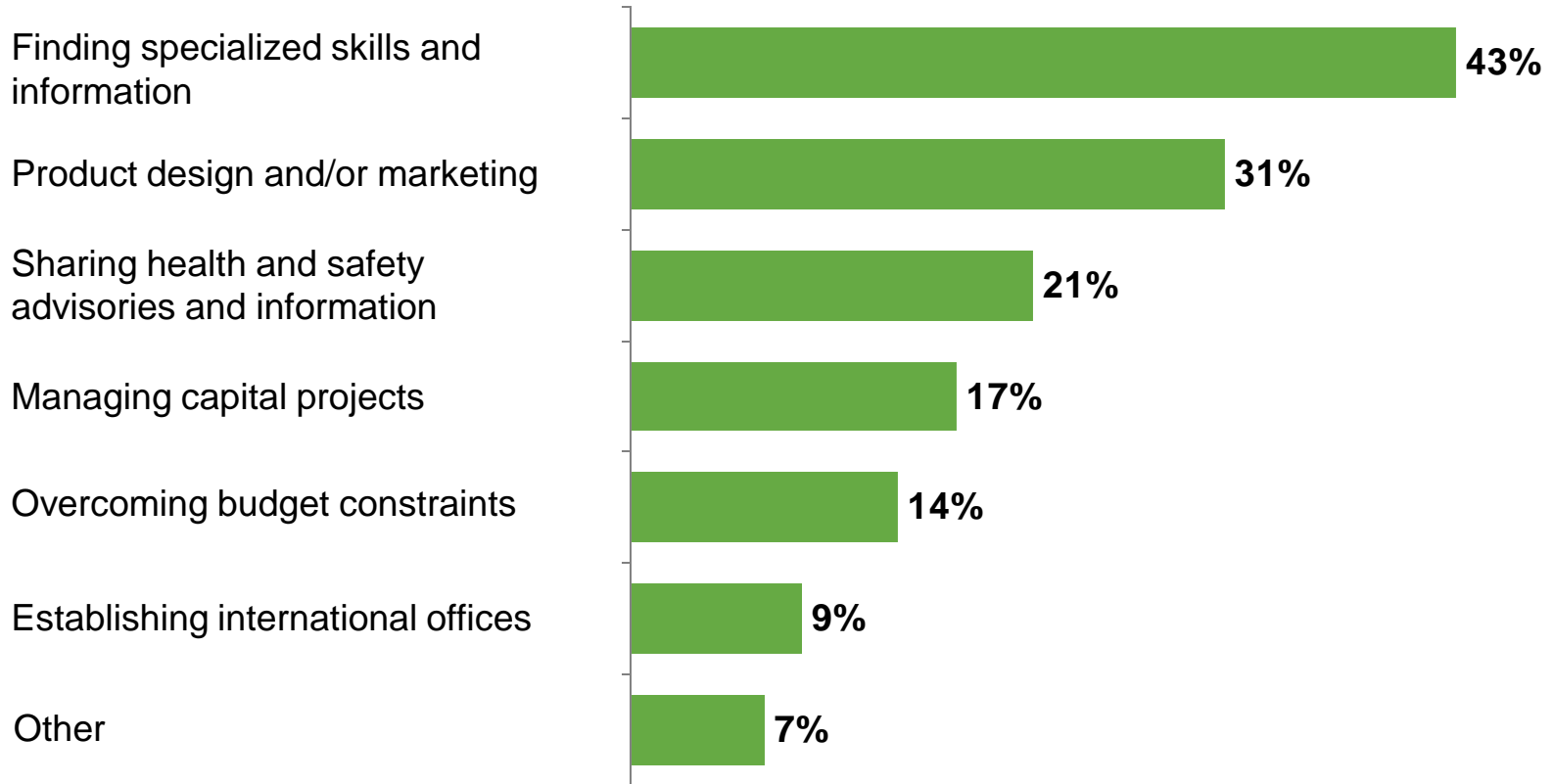
What are the biggest barriers to effective collaboration in your workplace? (Select all that apply)

Traditional Collaboration Tools Still Widely in Use



How do you most frequently collaborate? (Select all that apply)

Social Media Tools Emerging in Key Areas

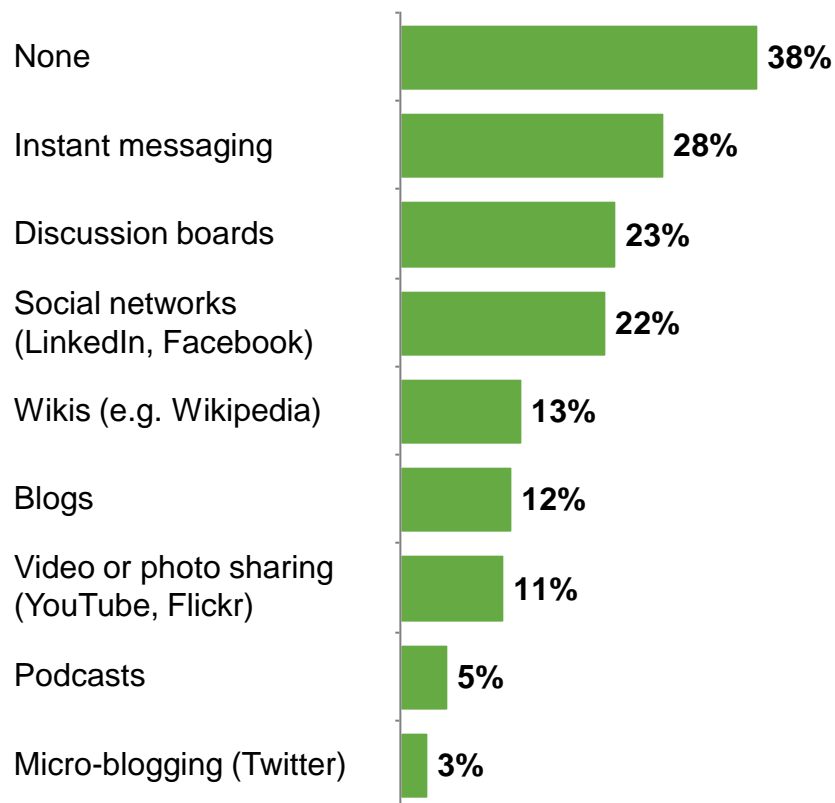


In the past 12 months, have you used social media tools at work for any of the following purposes? (Select all that apply)

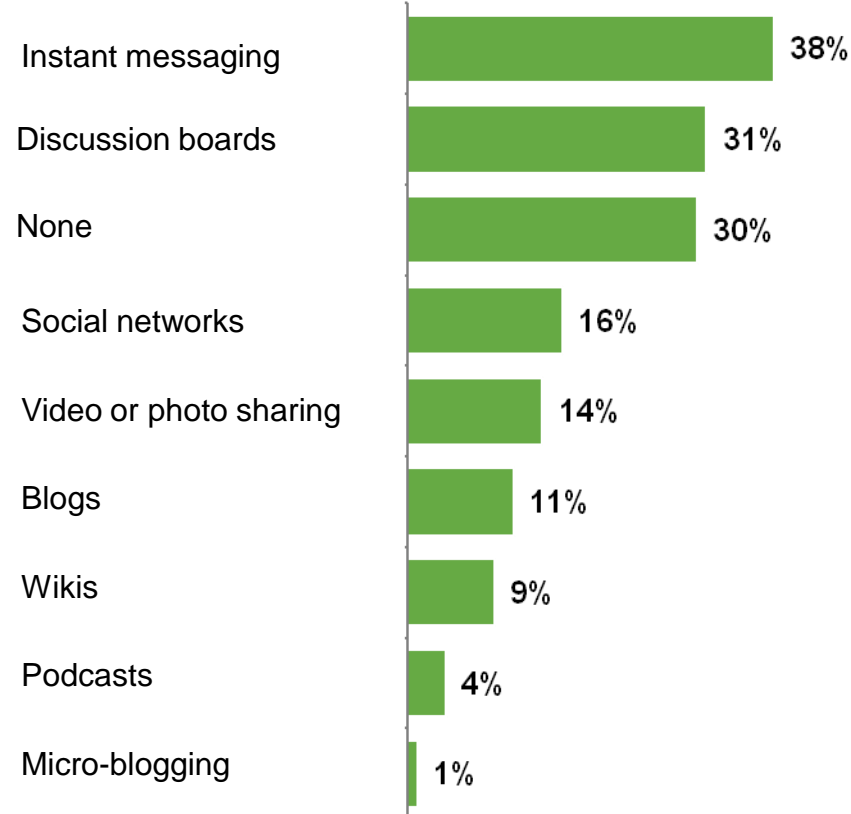
IM, Discussion Boards, Social Networks Top New Tools in Use Today



Public Social Media



Company Social Media



Which of the following public and company social media tools do you currently use for work collaboration? (Select all that apply)



Because it's everybody's  business