

FROST & SULLIVAN

ROCKWELL AUTOMATION AND SENSIA

2022
ENABLING
TECHNOLOGY
LEADER

GLOBAL
OIL AND GAS AUTOMATION INDUSTRY

Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each award category before determining the final award recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Sensia and Rockwell Automation excel in many of the criteria in the oil and gas automation space.

AWARD CRITERIA	
<i>Technology Leverage</i>	<i>Customer Impact</i>
Commitment to Innovation	Price/Performance Value
Commitment to Creativity	Customer Purchase Experience
Stage Gate Efficiency	Customer Ownership Experience
Commercialization Success	Customer Service Experience
Application Diversity	Brand Equity

Commitment to Creativity

Sensia was created with the goal of providing technologically advanced solutions focused on digital, measurement, and automation within the oil and gas industry. The solutions that Sensia provides are characterized by Intelligent Action, and their innovation in this space distinguishes Sensia from its

“The automation solutions that Sensia provides are characterized by their Intelligent Action, which distinguishes Rockwell Automation from its competitors, in terms of innovation.”

*- María Agustina de Sarriera,
Oil and Gas Industry Analyst*

competitors. Intelligent Action optimizes decision making, whether providing decision support for key stakeholders or automating decisions. This capability, which minimizes response time and maximizes value, can be deployed from the edge to the enterprise which differentiates the Sensia proposition. This is made possible through Sensia’s innovative portfolio which among other services includes a new offering combining both real-time control and edge-

computing capabilities within a single device. Sensia stands out in the industry based on its capacity to solve problems, maximizing past investments, and providing a unified platform. This helps limit the requirement for point solutions optimally deployed based on the needs of the industry and their customers. Enabling Intelligent Action makes Sensia different from any other solution provider in the oil and gas industry by being more innovative, creative, and efficient.

Brand Equity

Through the unification of sensing, intelligence, and action, Sensia brings together the best of the best: the pioneering process automation, real-time control and IoT technologies of Rockwell Automation, combined with the unmatched measurement, instrumentation software, and analytics capabilities of Schlumberger. Sensia is further strengthened by the oil and gas domain expertise and artificial lift experience shared by Rockwell Automation and Schlumberger. The result: the leading automation specialist in oil & gas production, transportation, and processing with a team of over 1,000 experts serving customers globally.

The growth strategy for Sensia is to leverage and grow its existing brand portfolio using innovation and a customer-centric approach. This has been an award-winning program for Sensia, and it has also allowed them to develop an acquisition plan that includes the recent purchase of Swinton Technologies.

Commitment to Innovation

Sensia's commitment to innovation is based on making automation capabilities from the edge to the enterprise smarter and more agile through Intelligent Action. Digital transformation requires agility and speed, and in today's landscape, businesses need to transform rapidly to keep up with the energy transition that the oil and gas industry is currently going through, while still maximizing their business performance. Sensia enables this agility for their customers through Intelligent Action.

The ability to create and provide applications that solve specific problems, and deploy these solutions within an edge to enterprise platform provides Sensia with significant agility and flexibility. This approach to problem solving is innovative and can provide Sensia with a competitive advantage in the oil and gas automation market.

Stage Gate Efficiency

Sensia's goal is simplicity and agility. Passed down from parent companies Rockwell Automation and Schlumberger, this approach puts the customer first. Offering a digital advisory service means Sensia can dynamically assess an operator's digital maturity, producing a value map that outlines considered incremental projects. This way, clients can extract the maximum value as quickly as possible, achieve their digital goals, realize a return on investment, and accelerate time to value.

Projects are delivered using an agile stage-gate process, maximizing stakeholder participation, facilitating de-risking, and focusing on values-based outcomes.

For example, one customer struggling to meet their ESG targets appointed Sensia to assist. Utilizing digital twin capability from Schlumberger and a Rockwell Automation control system, Sensia identified key operational inefficiencies. They introduced an incremental steps approach, which resulted in both energy use and chemical dosing reductions, and improvements to the customer's ESG performance.

Application Diversity

The brainchild of domain experts Rockwell Automation and Schlumberger, Sensia, offers several solutions for the oil and gas industry, including oil and gas production, oil and gas transportation and storage, and oil and gas processing solutions.

Production solutions focus on both onshore and offshore platforms and vessels, providing intelligent automation that enhances asset productivity and operational efficiency. These combine measurement, software, and automation. Transportation solutions are created by combining hydrocarbon flow knowledge and safety system expertise, and can be applied to the entire oil and gas transportation system. Sensia's processing solutions can help customers increase their operational effectiveness and optimize their processes while maintaining operational safety. Moreover, they can be applied to LNG plants, gas processing facilities, and oil refineries.

Customer Experience

Rockwell Automation offers a world-class customer experience (CX) business process, which helps customers and partners to easily and quickly navigate the complexity of the Rockwell ecosystem. This business process includes a collection of integrated systems, services, and experts that support each step of the customer's journey.

In the first stage of the program, the customer has a specific need and establishes a relationship with Rockwell Automation and Sensia and considers the company's various offerings. Later, they conduct an analysis on how the customer makes a decision and purchases the solution/service. For oil & gas, Sensia

“Rockwell Automation created Sensia to solve specific problems in the oil and gas industry and take the combined portfolio of its parent companies and extend it over time. Sensia's portfolio was formed by these industry leading brands for oilfield management, production data management, and instrumentation.”

**- María Agustina de Sarriera,
Oil and Gas Industry Analyst**

organizes a proposition that is carefully curated from their portfolio of petro-technical solutions and services. Upon purchase of the solution the next stage includes evaluating how the customer is on-boarded. Once the customer is properly on-boarded, the company's CX team conducts an analysis on how to maintain the solution to optimize the customer's needs. Lastly, the CX team evaluates the best window to renew or refresh the technology over time.

Rockwell Automation offers a well-designed CX digital platform. However, what mainly differentiates this

company from its competitors is that it possess dedicated customer success teams that take over following the customer purchase. These teams provide clients with their undivided attention, lead the on-boarding process, and follow up after clients adopt the technology. Moreover, these teams work with customers to leverage their time and provide full support to address their needs.

In its voice-of-the-customer program, the company selects customers in each industry segment to provide direct input into the company's roadmap and technology plans. These bellwether customers help Rockwell Automation to understand industry challenges and clients' needs across an entire industry segment such as oil & gas.

Additionally, the company has Organized Customer Communities in which customers work as interest groups at different conferences and forums. The company divides clients into personas with the intent of mapping the typical amount of technical support each individual customer needs.

Rockwell Automation works with customers to develop a journey map, with each client accessing the map throughout the purchased solutions lifecycle. The company's goal is to provide customers with a consistent, personalized experience to guarantee satisfaction and build customer loyalty.

Conclusion

Sensia is a prominent market participant in oil and gas automation, and the venture between Rockwell Automation and Schlumberger now addresses customers' needs that had not previously been covered in the market. The technological innovation in the Sensia platform is outstanding in terms of intelligence and agility, excelling in the market based on its significant advancements in the automation segment and the finesse of its technological solutions.

With its strong overall performance, Rockwell Automation and Sensia earn Frost & Sullivan's 2022 Global Enabling Technology Leadership Award in the oil and gas automation industry.

What You Need to Know about the Enabling Technology Leadership Recognition

Frost & Sullivan's Enabling Technology Leadership Award recognizes the company that applies its technology in new ways to improve existing products and services and elevate the customer experience.

Best Practices Award Analysis

For the Enabling Technology Leadership Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

Technology Leverage

Commitment to Innovation: Continuous emerging technology adoption and creation enables new product development and enhances product performance

Commitment to Creativity: Company leverages technology advancements to push the limits of form and function in the pursuit of white space innovation

Stage Gate Efficiency: Technology adoption enhances the stage gate process for launching new products and solutions

Commercialization Success: Company displays a proven track record of taking new technologies to market with a high success rate

Application Diversity: Company develops and/or integrates technology that serves multiple applications and multiple environments

Customer Impact

Price/Performance Value: Products or services provide the best value for the price compared to similar market offerings

Customer Purchase Experience: Quality of the purchase experience assures customers that they are buying the optimal solution for addressing their unique needs and constraints

Customer Ownership Experience: Customers proudly own the company's product or service and have a positive experience throughout the life of the product or service

Customer Service Experience: Customer service is accessible, fast, stress-free, and high quality

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty

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Key Impacts:

- **Growth Pipeline:** Continuous Flow of Growth Opportunities
- **Growth Strategies:** Proven Best Practices
- **Innovation Culture:** Optimized Customer Experience
- **ROI & Margin:** Implementation Excellence
- **Transformational Growth:** Industry Leadership



The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

- **Mega Trend (MT)**
- **Business Model (BM)**
- **Technology (TE)**
- **Industries (IN)**
- **Customer (CU)**
- **Geographies (GE)**

