

Collecting Sales Leads using Collector and ArcGIS Online

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GIS Lead - Missouri

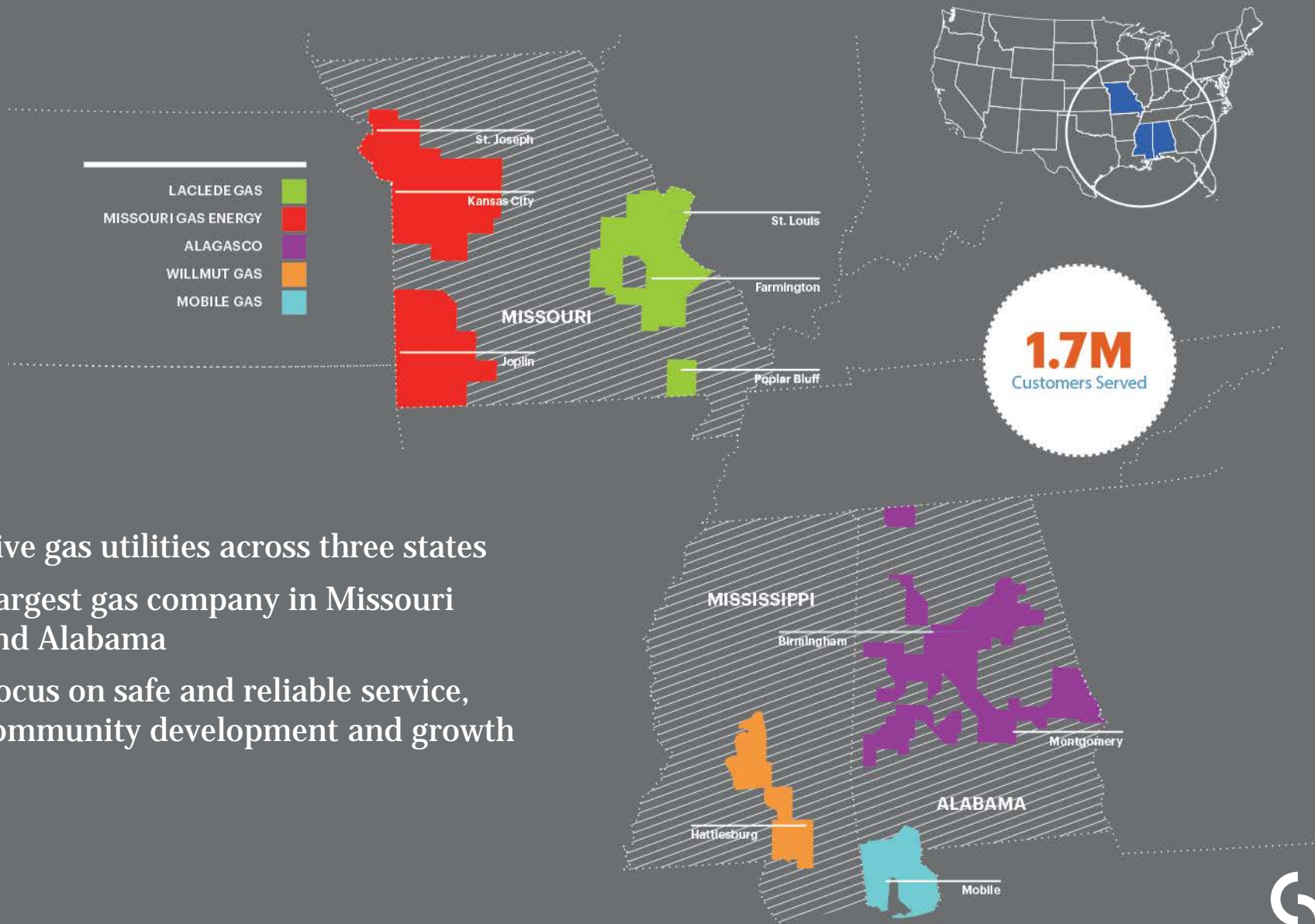
9/8/2017



Agenda

- About Spire
- Project Overview
- ArcGIS Online Architecture
- Web Application using ArcGIS Online
- Mobile Collection with Collector
- Data Management
- Conclusion

At our core, we are a gas company



- Five gas utilities across three states
- Largest gas company in Missouri and Alabama
- Focus on safe and reliable service, community development and growth



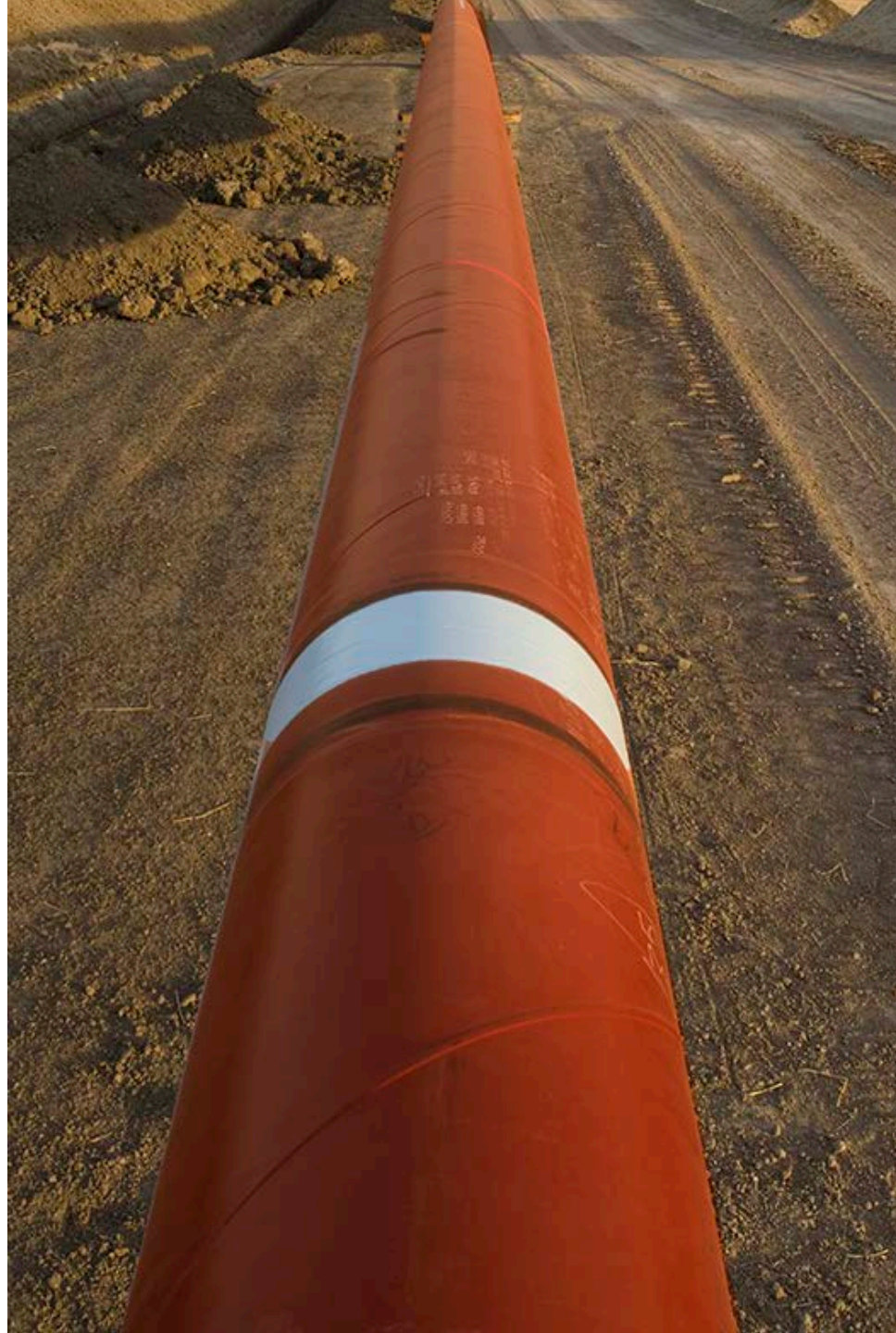
Project Overview



Project Overview

Project Drivers

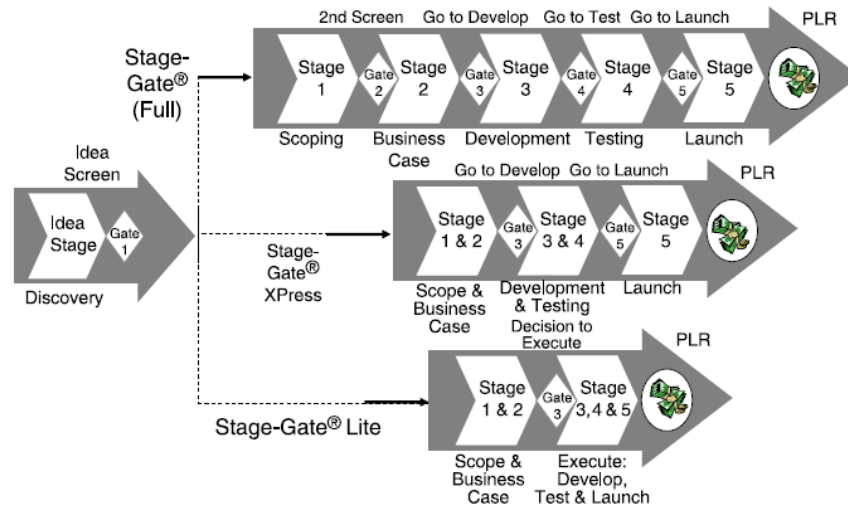
- The Sales Department at Spire currently uses Sale Force to manage new growth opportunities across our service territory.
- Through the testing and implementation of Sales Force they identified a need to have ready access to our company assets and collect potential sales leads in a map outside of the network.
- A solution was developed using Collector and ArcGIS Online
- Allows for customization of data and tools for a specific user base.
- These applications were not a replacement for Sales Force day to day work flows.



Project Overview

Planning and Management

- Used the Stage Gate process to Plan and Manage the project.
 - What is Stage Gate?
 - “A Stage Gate process is a conceptual and operational map for moving new product projects from idea to launch and beyond – a blue print for managing new product development (NPD) process to improve more effectiveness and efficiency.” (Cooper, 2008)



Major new product projects go through the full five-stage process (top)
Moderate risk projects, including extensions, modification & improvements, use the XPress version (middle)
Sales-force & Marketing requests (very minor changes) use the Lite process (bottom)



Project Overview

Planning and Management

- Broken down into 5 Stages.
 - Pilot and Define Stage
 - Planning and Discovery Stage
 - Build Stage
 - Validate Stage
 - Launch Stage
- Gate Reviews with Key Stakeholders held in between each Stage.
 - Reviewed project progress
 - Approval to Continue given or denied

Task Name	% Complete	Duration (Calendar Days)	Start	Finish	Resources
Pilot	100%	98	12/1/2016	3/9/2017	Garrett, Longo, Passentino, Jones, McMillan
Define Stage		0			
Project Charter Draft and Review		18	3/10/2017	3/28/2017	Bartlett, Voelker, Suda, Garrett
Unofficial Define Gate Review		0			Bartlett, Voelker, Suda, Garrett
Planning and Discovery		8	4/24/2017	5/2/2017	Bartlett, Voelker, Suda, Garrett
Roadmap		4	4/24/2017	4/28/2017	Bartlett, Voelker, Suda, Garrett
Requirements		4	4/24/2017	4/28/2017	Bartlett, Voelker, Suda, Garrett
Planning and Discover Gate Review		1	5/1/2017	5/2/2017	Bartlett, Voelker, Suda, Garrett, Vlaich, Popielski
Build Stage - Analyze, Design and Develop		30	5/3/2017	6/2/2017	Bartlett, Voelker, Suda
Analyze & Design		14	5/3/2017	5/17/2017	Bartlett, Voelker, Suda
ArcGIS Online		7	5/3/2017	5/10/2017	Bartlett, Voelker, Suda
Group Design		0			Bartlett, Voelker, Suda
Roles/Users		0			Bartlett, Voelker, Suda
Credit Allocation		0			Bartlett, Voelker, Suda
GIS Data Design		0			Bartlett, Voelker, Suda
Sales Application Design		0			Bartlett, Voelker, Suda
Sales Dashboard Design		0			Bartlett, Voelker, Suda
Organization Impact Assessment		0			Bartlett, Voelker, Suda
Licensing		0			Bartlett, Voelker, Suda
Publication		0			Bartlett, Voelker, Suda
Business Design		7	5/10/2017	5/17/2017	Bartlett, Voelker, Suda
Work Process		0			Bartlett, Voelker, Suda
Integration Considerations (sales force)		0			Bartlett, Voelker, Suda
Work Process		0			Bartlett, Voelker, Suda
Potential future integration		0			Bartlett, Voelker, Suda
Develop		16	5/17/2017	6/2/2017	Bartlett, Voelker, Suda
ArcGIS Online		7	5/17/2017	5/24/2017	Bartlett, Voelker, Suda
Training Materials		7	5/24/2017	5/31/2017	Bartlett, Voelker, Suda
ArcGIS Online		0			Bartlett, Voelker, Suda
Business		0			Bartlett, Voelker, Suda
Build Gate Review			6/19/2017	6/19/2017	Bartlett, Voelker, Suda, Garrett, Vlaich, Popielski
Validate		32	6/19/2017	7/21/2017	Garrett, Longo, Passentino, Jones, McMillan
Unit Testing		24	6/20/2017	7/14/2017	All Users
Final Evaluation		4	7/17/2017	7/21/2017	All Users
Validate Gate Review		0	7/20/2017	7/20/2017	All Users
Launch Stage		6	7/24/2017	7/30/2017	Bartlett, Voelker, Suda
GO-Live		0	7/28/2017	7/28/2017	Bartlett, Voelker, Suda
Post Go-Live Validation		4	7/31/2017	8/4/2017	All Users



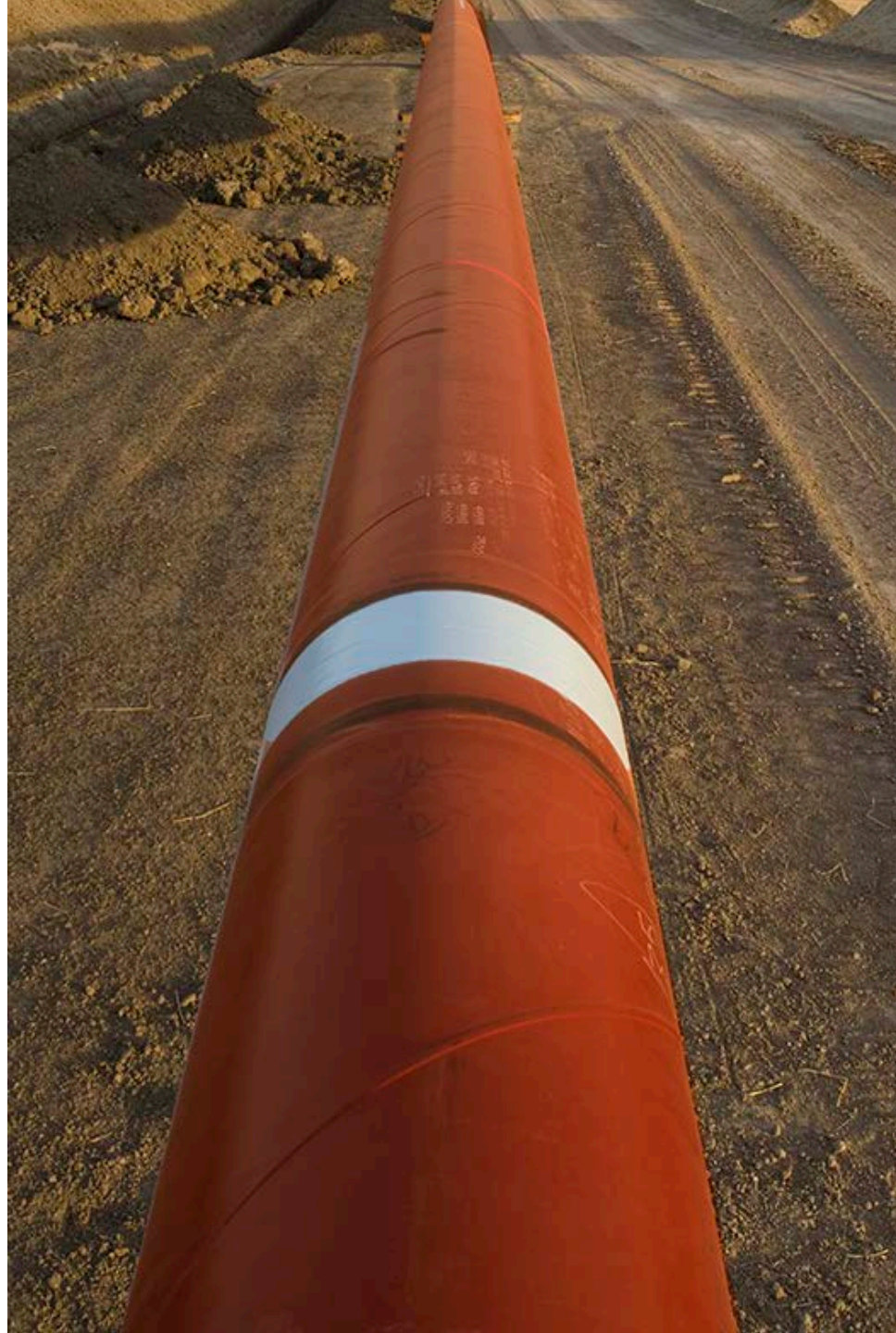
ArcGIS Online Architecture



ArcGIS Online Architecture

Administration

- A list of 27 end users were identified during the build stage.
- Each user was given a named User ID and invited to join the Spire AGOL organization.
- Each user classified as a level two user
- A Spire Sales Group was then created within organization
- All user then placed in the group and the data, web maps and web apps were all shared to this group.



Web Application using ArcGIS Online



Web Application using ArcGIS Online

Design Requirements

- Overall look feel of our current internal Flex Viewer.
- Ability to change base maps.
- Ability to see all facilities in the Missouri service territory
- Ability to create data points for potential growth opportunities in a map and manage them.
- Ability to create and print maps/exhibits.

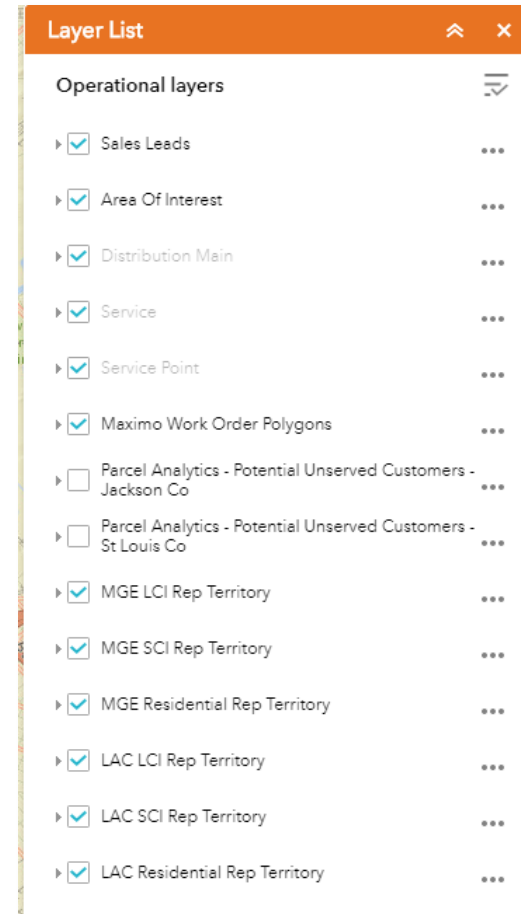
Requirements To Date:	Mobile	Web App
Accessibility		
Outside VPN	Y	Y
Secure	Y	Y
Data		
See Distribution Main	Y	Y
See Services	Y	Y
See Service Points	Y	Y
See Rep Polygons (MGE and LAC)	Y	Y
Work Order Polygons	Y	Y
Sales Analytics	Y	Y
Functionality		
Be able to collect Sales Leads (points)	Y	Y
Be able to collect to Area of Interests	Y	Y
Ability to Change basemaps (AG Online)	Y	Y
Ability to turn off layers	Y	Y
Ability Draw and Measure	Y	Y
Ability to Navigates (Routing)	Y	N
Ability to Filter Leads and Area Of Interest	N	Y
Ability to Attach Documents	N	Y
Ability to Attach Pictures	Y	Y
Ability to Search for addresses or Landmarks	Y	Y
Ability to Pin Places (Bookmarks)	Y	Y
Export Data to Excel	N	Y
Ability to Create Map or Sketch	Y	Y
Ability to Print Map or Sketch	Y	Y



Web Application using ArcGIS Online

Data Components

- Background Data
 - Base Maps (Streets and Aerials) from ArcGIS online.
 - Facility Data
 - Distribution and Transmission Mains
 - Service Lines
 - Service Points (Customer Points)
 - Work Area Polygons
 - Analytical Layers
 - Non Customer County Parcel Data
- Editable Data
 - Sales Lead point feature
 - Schema and domains aligned with Sales Force Leads
 - Area of Interest polygon feature
 - Larger areas for potential conversion or organic growth.



Web Application using ArcGIS Online

- Web Application Features
 - Widgets
 - Edit
 - Allows user to Add Features to the Sales Lead and Area of Interest feature classes
 - Users can also attach pictures, PDF, Excel, Word doc, etc
 - Filter
 - Allows user filter Leads, Area of Interests, Work Order Polygons, and Parcel Analytics
 - Select
 - Users can select features and export them.
 - Bookmarks
 - Tools
 - Measure
 - Draw
 - Print
 - ESRI World Geocoder

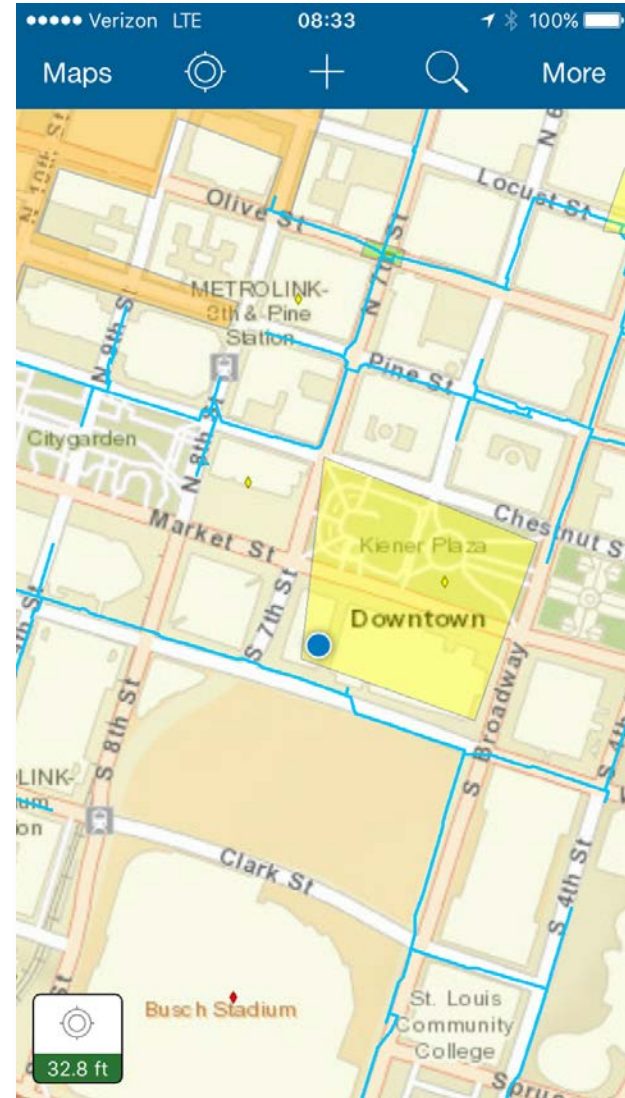


Mobile Collection with Collector



Mobile Collection with Collector

- Collector Features
 - Turn on and off layers
 - Ability to identify facilities
 - Ability for users to collect data with GPS on their mobile device or manually place leads
 - Attach photos to collected features
 - Create sketches or markups on their mobile device
 - Search for Landmarks or addresses
 - Turn by turn directions
 - Find address via reverse geocoding



Data Management



Data Management

Publishing – Getting the data out to AGOL

- Features created by the Sales end users
 - Features and schema created in File Geodatabase via ArcCatalog
 - Symbolized and published as a feature service via MXD
- Base Facility Data – Distribution Main (includes Transmission), Service, Service Points,
 - Symbolized and Published from SDE database via MXD
- Other Data – Parcel Analytics and Sales Rep Polygons
 - Symbolized and published as a feature service via MXD
- Base Maps from ArcGIS Online Living Atlas



Data Management

Updating

- Features created by the Sales end users (Sales Leads and Area of Interest)
 - Created and Managed out in Cloud
- Base Facility Data
 - Updated weekly using the Geoworx Sync from GeoNexus
 - Allows for updating facility data without having disrupt service to the end user
- Parcel Analytics
 - Revised and Republished Quarterly
- Sales Rep Polygons
 - Static
- Base Maps from ArcGIS Online Living Atlas



Conclusions



Conclusion

- Using Collector and ArcGIS Online we are able to easily Design, Develop, and Deploy a solution that allows the Spire Sales group to have ready access to our facility information outside of the network.
- This solution allows the Sales reps to effectively communicate with current and potential customers in the field.
- Gives them ability to analyze data collected make business decisions to increase the growth of Spires customer base.



Thank you!

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Questions?

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