Medallion pumped for success with Infor CloudSuite Industrial

A full-service midstream provider for the some of the US's leading oil and gas producers, Medallion builds pipelines and pipeline connectors for its partners and customers, and also provides storage facilities. With more than 95% its business focused on crude oil liquid and the rest on natural gas, the company moves about 1 million barrels of oil per day and stores around 1.4 million barrels. Operating over 1,300 miles of pipeline, Medallion considers itself a boutique provider of bespoke services to the industry.

Medallion has a strong track record of going above and beyond to maximize value for its customers, without compromising the safety of its people, assets, or the communities it works in. To compete in the high-pressure oil midstream sector, the company emphasizes customer visibility into the storage, processing, and transportation of oil processes.

Headquarters
Irving, Texas

Operating revenue
$237 million (2021)

Industry
Oil & Gas

Employees
170+

Infor product
Infor CloudSuite® Industrial

Website
medallionmidstream.com

> " **CloudSuite Industrial is probably one of the smoothest and most simple platforms that I've used. There's still a contingent that thinks that enterprise systems can't run in the cloud. And that's simply just not true.**"
>
> JOEL WOLFE
> Vice President of Technology, Medallion

Medallion looked to Infor® CloudSuite Industrial to help meet these challenges, streamline its complex and fast-moving operation, increase efficiency, and deliver greater value.

Modernizing via the cloud

Prior to the CloudSuite Industrial modernization project, Medallion started using Infor SunSystems®. Immediately after this implementation, Joel Wolfe started at Medallion as Vice President of Technology. While SunSystems met many of the company's needs, Wolfe started to wonder if that was the best solution for the company. Being a longtime supporter of cloud-first strategies, Wolfe went back to Infor to explore other cloud-centric solutions that could deliver even more advanced capabilities.

Wolfe recognized that CloudSuite Industrial offered Medallion far more operational flexibility than an on-premises solution could. Moving to CloudSuite Industrial would represent a complex enterprise resource planning (ERP) modernization and efficiency project that would help to simplify the user experience. Wolfe was also looking forward to leveraging CloudSuite Industrial's automation capabilities in areas such as accurate meter reading and reporting, which could help Medallion gain a competitive advantage

While Medallion is in the oil and gas industry, Medallion was looking to leverage the solution's manufacturing functionality. According to Wolfe: "We're not a manufacturer in a sense, but some of our processes are uniquely aligned to that industry, and that is why we picked that solution. We're 'building' those pipeline projects."

"When I looked at Infor's cloud solutions, I saw that Infor has a great product in CloudSuite Industrial. It could provide the same look and feel we wanted, plus offer us a more advanced development platform."

The solution was well suited to support Medallion's processes, which are uniquely aligned to long-term projects that help build pipeline projects and meet the needs of oil and gas producers. Once a pipeline is complete, Medallion manages it as if it's a service contract with consumption-based billing.

Business challenges

- Make processes less time-intensive and increase visibility into projects

- Leverage automation to improve the accuracy of reading and reporting meter measurements

- Simplify the user experience and reduce the complexity of processes

Becoming a cloud-first company

Implementing CloudSuite Industrial would help make Medallion a cloud-first company operating in the digital oil field age. "Our model is a little bit unique in that we're not one of the major names you would recognize as distributing across the US. We're more of a boutique type of company," explained Wolfe. When Medallion's partners produce oil, they design how they're going to drill their oil wells. But then they need to send it somewhere. Using trucks for transportation isn't very economical or practical. Medallion builds pipeline connectors to their partners' facilities and then operates those connectors. "We are midstream gathering, taking crude oil, moving it, storing it, and also helping producers market between themselves—depending on production loads, needs, and availability," said Wolfe. "So, it's not just point A to point B. Sometimes the crude oil moves several times during a month."

Medallion's business model enables it to stand apart from the competition and achieve profitability. "If you look at our segments within the basin, we have a unique approach," explained Wolfe. "We've planned for multiple inlets and outlets throughout our pipeline, so that we can be flexible. No one customer holds more than 12–14% market share. So, we serve a lot of producers in the basin, all connecting to the same pipeline."

CloudSuite Industrial would allow Medallion to simplify the user experience of managing many of its processes—a significant number of which involved dozens of clicks just to achieve a simple goal. CloudSuite Industrial would ultimately help reduce the complexity of these processes by 70–80%.

Seeing productivity improvements

"ERP deployments aren't usually very fun and a lot of times they don't come out exactly the way you want them to," explained Wolfe. "But this one, all things considered, was really quite simple." The solution's ability to seamlessly integrate with other applications enabled Medallion to link CloudSuite Industrial to other applications. This deployment wasn't "a lift and shift." Wolfe explained that Medallion looked to "maintain the existing user experience, while at the same time simplify processes." Procurement was an area where processes in particular were vastly improved. "These were the kinds of productivity improvements we were looking for. The complexity of the old systems was costly. Clearly the overhead to maintain those outdated systems was unbearable."

Streamlining processes

Overcoming the complexities of its prior system has put Medallion well on its way to achieving its goal of streamlining operations and increasing both internal and external visibility, while also helping the company reduce administrative overhead and create additional time savings.

For instance, Medallion's measurement group was able to leverage CloudSuite Industrial's functionality to help it verify the integrity of meters. According to Wolfe: "A major part of our business is dependent on our so-called order-to-cash or order-ship type model." Medallion needs to know if its measurements are correctly recorded and reported. "We need to know if there are imbalances between what the shipper shows and what we show. There are so many processes and spreadsheets that are involved. We're looking to automate a lot of that and integrate it with our SCADA systems."

Establishing strong measurement quality numbers is critical to be able to provide the financial side with accurate invoices. "This has been somewhat of an intensive process, but with CloudSuite Industrial, we're in the process of transforming some areas of the business to where many processes are streamlined," said Wolfe.

Business results

- Saved time and increased visibility into projects in areas such as order-to-cash and order-ship

- Ensured that measuring, recording, and reporting of meter data is accurate

- Simplified the user experience, such as reducing the complexity of some processes by up to 80%

Transforming the business

Medallion expects that Infor CloudSuite Industrial will help it transform many areas of the business and significantly reduce man hours. This will be achieved through automating many existing spreadsheet-based processes.

This should all contribute to the growing time saved via automation, increased visibility for customers, greater cross-organizational visibility for projects, collecting and reporting accurate data, and simplifying the user experience. Medallion may be considered a mid-sized company in the pipeline business, but it has big aspirations.

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