



Managing Field Crews for Maximum Impact

A practical guide to morning meetings, daily routes, shift reporting, and the operational rhythms that separate high-performing field teams from reactive ones

WorkSync | Operational Intelligence for Energy Infrastructure
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The Well Tier System

Understanding Where the Value Is

Not all wells deserve equal attention. In operational excellence, the question is not "how many wells should we visit today?" but rather "which wells deliver the greatest economic impact per dollar invested?" This fundamental principle drives everything from morning meetings to route planning.

Tier	Daily Cash Flow	Visit Frequency	Crew Assignment
Tier 1 — High Value	> \$1,000	Daily or on exception	Best, most experienced operators
Tier 2 — Mid Value	\$250 - \$1,000	2-3x/week or on exception	Qualified field operators
Tier 3 — Marginal	< \$250	Weekly or exception-only	Any qualified operator

Dynamic Re-Tiering Triggers

Tiers are NOT static. Economic value changes daily. A Tier 3 well becomes Tier 1 after a workover. Commodity price movements (\$5/barrel oil changes cash flow on dozens of wells), workover completions, decline curve progression, equipment changes (new ESP, rod pump conversion), and seasonal factors (gas pricing swings) all require monthly tier review and dynamic reassignment.

How Major Operators Do Tiering

Devon Energy: Exception-based operations with 2 targeted reports per day, effectively auto-tiering through real-time monitoring.

Occidental: Nexus application ranks work orders across 27,000 wells automatically using economic prioritization.

Industry Trend: Moving from static spreadsheet tier lists to dynamic, economically-driven prioritization.

When a Tier 1 well and a Tier 3 well both show alarms at the same time, there should be zero debate about which one gets visited first.

The Math Behind Tiering

Consider a 500-well portfolio. If 10% are Tier 1 (\$1,000+/day), 30% are Tier 2, and 60% are Tier 3, your top 50 wells generate 60-70% of total revenue. A 2% production improvement on those 50 wells is worth more than a 10% improvement across all 300 Tier 3 wells. This is why economic tiering transforms field operations — it focuses your best people on your best assets every single day.

A Day in the Life

Before and After WorkSync

BEFORE: Operator J. Martinez, 5:15 AM

Martinez arrives at the district office. Opens SCADA on the desktop, scans 80+ alarms from overnight - most are nuisance alarms, but it takes 20 minutes to sort through them. Opens Excel to check yesterday's production numbers. Pulls up a separate Google Sheet to build today's route based on memory and the superintendent's whiteboard notes. Checks email for any overnight voicemails forwarded by the answering service. Total prep time: 75 minutes before leaving the office. Route is 20 wells, built by proximity. No idea which wells are worth the most money today.

AFTER: Operator J. Martinez, 5:45 AM

Martinez opens the WorkSync app on his phone while drinking coffee at home. His route is already built - 24 stops, economically prioritized, with the 5 Tier 1 wells first. Three escalation flags are highlighted in red: North B2 dropped 40% overnight, North C1 has erratic pump cards, North D3's dump valve is acting up again. He sees estimated arrival times, task descriptions, and which wells he can skip if he runs long. By 6:15 AM he's in the truck. Morning meeting at 6:30 is a 15-minute confirmation, not a planning session. Total prep time: 10 minutes. He knows exactly where the money is today.

	Before	After
Morning Prep	75-95 min at the office	10 min from phone
Route Planning	Manual, proximity-based	Auto-generated, economic priority
SCADA Review	20 min scanning 80+ alarms	Pre-filtered exceptions only
Morning Meeting	30-45 min planning session	15 min confirmation
Field Visibility	Superintendent calls to check in	Real-time GPS + task status
End of Shift	Paper notes, data entry next day	Mobile report, instant closed-loop

The difference is not technology. The difference is that every minute of Martinez's day is now spent on the highest-value work, not on data assembly and guesswork.

The 30-Minute Morning Meeting Every Minute Has a Job

This is the daily alignment mechanism. It never exceeds 30 minutes. Every minute has a purpose. Routes should be pre-built before the meeting, not during it.

Time	Section	Purpose	Who Leads
0:00-0:02	Safety Moment	Rotating crew member safety briefing	Crew Lead
0:02-0:07	Yesterday's Exceptions	Review any issues from previous shift	Superintendent
0:07-0:17	Today's Priority Stack	Review top 10 wells by cash flow, assign routes	Superintendent
0:17-0:22	Overnight Changes	SCADA tech reports any system anomalies	SCADA/Ops Tech
0:22-0:27	Resource & Logistics	Confirm equipment, vehicles, qualifications	Foreman
0:27-0:30	Confirm & Dispatch	Final confirmation and route dispatch	Superintendent

Meeting Rules: No status reporting - only exceptions. If yesterday went to plan, Section 2 takes 60 seconds. The meeting leader cuts off tangents. Routes should be pre-built before the meeting, not built during it.

The Superintendent's Pre-Meeting Prep (5:30 AM)

5:30-5:45 AM: Review overnight SCADA exceptions and production accounting anomalies. **5:45-6:15 AM:** Build or confirm route cards based on tier priorities, cross-reference CMMS for outstanding work orders. This 45-minute prep is what makes the 30-minute meeting possible.

The Daily Route Template

What a Route Should Look Like

Routes are the physical manifestation of strategy. A well-optimized route prioritizes economic value, clusters geographically, minimizes windshield time, and assigns appropriate operators to appropriate wells.

Sample Route Card: Operator J. Martinez, Area: North Lease (24 Stops)

#	Well/Site	Tier	Issue/Task	Time	Status
1	North A1	T1	Gas lift optimization audit	30 min	Assigned
2	North A3	T1	ESP amp check, vibration reading	25 min	Assigned
3	North B2	T1	Production decline investigation	30 min	Assigned
4	North B5	T1	Chemical injection rate adjust	20 min	Assigned
5	North C1	T1	Rod pump card review, stuffing box	25 min	Assigned
6	North C4	T2	Tank level check, gauge reading	15 min	Assigned
7	North D1	T2	Monthly tank strapping	20 min	Assigned
8	North D3	T2	Separator dump valve inspection	15 min	Assigned
9	North D7	T2	Meter calibration verification	15 min	Assigned
10	North E2	T2	Pump performance trending	15 min	Assigned
11	North E5	T2	Line pressure check	10 min	Assigned
12	North F1	T2	Wellhead visual, casing pressure	10 min	Assigned
13	North F4	T2	Chemical tank refill	15 min	Assigned
14	North G2	T3	Routine production check	10 min	Assigned
15	North G5	T3	Visual inspection	10 min	Assigned
16	North H1	T3	Gauge reading only	5 min	Assigned
17	North H3	T3	Gauge reading only	5 min	Assigned
18	North H6	T3	Visual inspection	5 min	Assigned
19	North J2	T3	Gauge reading only	5 min	Assigned
20	North J4	T3	Visual inspection	5 min	Assigned
21	North K1	T3	Gauge reading only	5 min	Assigned

#	Well/Site	Tier	Issue/Task	Time	Status
22	North K3	T3	Visual inspection	5 min	Assigned
23	North L2	T3	Gauge reading only	5 min	Assigned
24	North L5	T3	Routine production check	10 min	Assigned

Escalation Notes for This Route:

Stop 3 (North B2, Tier 1): Production dropped 40% overnight per SCADA. If cause is not obvious on arrival, do NOT troubleshoot beyond 15 minutes. Document readings, take photos, call Central Command for specialist dispatch.

Stop 5 (North C1, Tier 1): Rod pump showing erratic dynamometer cards for 3 days. If stuffing box is leaking, tag out and escalate immediately. Do not attempt field repair.

Stop 8 (North D3, Tier 2): Separator dump valve stuck open last week. If issue recurs, escalate to workover list. Do not spend more than 10 minutes on temporary fix.

Metric	Value
Total Stops	24
Tier 1 Wells	5
Tier 2 Wells	8
Tier 3 Wells	11
Est. Windshield Time	1.5 hours (17%)
Est. On-Site Work Time	7.2 hours
Est. Total Shift Time	8.7 hours
Escalation Flags	3 (Stops 3, 5, 8)

Windshield Time - The Hidden Cost

Best practice: Less than 30% of total shift. **Typical poorly optimized route:** 40-50% of shift driving. **Critical stat:** 21.5% of oil and gas fatalities involve lone workers, and the single most dangerous activity is driving. Measurement: GPS fleet tracking with geofencing at well pads, automatic time-on-site calculation.

Five Strategies to Cut Windshield Time

1. **Route optimization by economic value per stop**, not just distance
2. **Exception-based surveillance** eliminating unnecessary routine visits
3. **Clustering high-priority wells** geographically
4. **Mobile-first tools** eliminating return-to-office data entry trips
5. **Predictive dispatch** matching tasks to nearest qualified operator

If an operator is spending more than 30% of their day driving, the route needs restructuring.

Route Economics: Why Sequence Matters

Route optimization is not about minimizing miles — it is about maximizing economic recovery per hour of operator time. The difference between a proximity-based route and an economically optimized route is significant:

Metric	Proximity-Based Route	Economically Optimized Route
Stops per shift	18-20	22-26
Tier 1 wells visited first	Random (depends on location)	100% — always first
Revenue at risk covered	60-70% of daily exposure	90-95% of daily exposure
Avg response to T1 exception	4-6 hours (mid-route)	<2 hours (flagged at 6 AM)
Windshield time	35-45% of shift	15-25% of shift
Deferred production caught	Reactive — next day	Same day — pre-flagged by SCADA

The math: A 500-well portfolio with 50 Tier 1 wells averaging \$1,500/day cash flow has \$75,000/day in Tier 1 revenue. A 2% improvement in deferred production recovery from faster response = \$1,500/day = \$547K/year. That single improvement comes from visiting the right wells first — no new equipment, no new hires.

Managing the Day Central Command Model

One person maintains real-time awareness of all operator locations, task status, and remaining work. This "Central Command" function is not a bottleneck - it is the operating system.

Three Critical Check-In Points

Morning Dispatch (6:30 AM): Route confirmation, safety briefing, qualification check. Operator confirms they understand the priority stack and have all required tools and documentation.

Mid-Day Pivot (4-hour mark): Status report from each operator. This is critical for lone workers - health/safety check, completion status, resource needs, and any exceptions discovered in the field.

Eight-Hour Mark: Completion status, disposition of incomplete work, setup for next-day operations.

The Escalation Protocol

1. **Document the issue** (photos, notes, readings)
2. **Call Central Command immediately** - do not attempt field repair without authorization
3. **Central Command decides:** dispatch specialist, add to tomorrow, schedule workover
4. **Operator proceeds** to next stop

Individual operators should never make resource allocation decisions in isolation. A Tier 1 well at \$2,000/day deserves immediate specialist response; a Tier 3 well at \$150/day might wait until tomorrow.

SCADA-to-Dispatch Integration

Automated job creation from tank levels and exception alerts. **AI resource matching:** tasks to nearest qualified technician with real-time mobile push notifications. **Result:** 20% cost per ticket reduction through optimized routing (Engage Mobilize data).

Real-Time Decision Support

Central Command needs five data streams to make effective real-time decisions: **(1)** Live operator GPS locations from fleet tracking (Verizon Connect, Geotab) to know who is closest to an emergency. **(2)** Task completion status from mobile app check-ins to track route adherence. **(3)** SCADA exception feed from CygNet, Ignition, or Emerson so new exceptions appear as they happen. **(4)** Well tier overlay from production accounting (P2, SAP) showing color-coded economic priority. **(5)** Escalation queue from field operator submissions ranked by economic impact.

When these five feeds converge on a single screen, the superintendent can make resource allocation decisions in seconds instead of minutes. A new SCADA exception on a Tier 1 well triggers an immediate check: who is closest? Are they on a lower-priority task? Can they be redirected? This is the difference between reactive and proactive field operations.

Central Command is not a new hire — it is a new function. Most superintendents already do this informally. The difference is real-time data instead of phone calls and memory.

Lone Worker Safety Protecting Your People

Lone workers face unique risks. OSHA requires employers to account for employees at regular intervals, ensure accessible emergency communication, and conduct regular risk exposure reviews.

2026 OSHA Focus Areas

Heat illness prevention: Monitoring core body temperature, hydration protocols, rest schedules in high-temperature environments.

Expanded recordkeeping: More detailed incident documentation and near-miss reporting.

Workplace violence prevention: Training and protocols for hostile situations or equipment failure incidents.

Technology Solutions

Blackline Safety G7: Man-down detection, gas detection (H2S, LEL, O2), satellite failover, panic button.

GPS Fleet Tracking: Real-time visibility (Verizon Connect, Geotab, GPS Insight) with geofencing alerts.

Critical Stat: 21.5% of oil and gas fatalities involve lone workers.

Lone Worker Check-In Best Practices

Check-In Type	Timing	Method	Escalation If Missed
Morning Dispatch	6:30 AM	Voice/radio	Superintendent calls operator
Mid-Day Status	4-hour mark	Voice/SMS/app	Supervisor calls immediately
End-of-Shift	8-hour mark	Voice/app	Emergency dispatch if no contact
Emergency Protocol	Any time	Panic button/G7	Immediate emergency services

End-of-Shift Report Template

Closing the Loop

The closed-loop mechanism. 10-15 minutes. Feeds tomorrow's morning meeting. Every shift produces data that either validates today's decisions or informs tomorrow's priorities.

Section 1: Route Completion

Metric	Value
Stops Planned	24
Stops Completed	22
Completion Rate	92%
Windshield Time	90 minutes (17%)
On-Site Time	7.0 hours (81%)
Total Shift Time	8.7 hours
Escalations Filed	3 (Stops 3, 5, 8)

Section 2: Well Status Updates (Highlights)

Well/Site	Tier	Work Performed	Current Status	Follow-Up?
North A1	T1	Gas lift optimization audit	Good	No
North B2	T1	Production decline investigation	Escalated	Yes - specialist
North C1	T1	Rod pump card, stuffing box	Escalated	Yes - tagged out
North D3	T2	Separator dump valve inspect	Issues found	Yes - workover list
North D7	T2	Meter calibration verification	Good	No
North F4	T2	Chemical tank refill	Good	No
North L5	T3	Routine production check	Good	No

Section 3: Escalations & Issues

Well/Site	Issue	Priority	Recommended Action
North B2	40% production drop overnight	High	Specialist dispatch tomorrow AM
North C1	Stuffing box leak, tagged out	High	Workover crew needed
North D3	Dump valve stuck open (recurring)	Medium	Add to workover list

Section 4: Equipment & Parts

Equipment Status: All tools and safety equipment returned, functional, and stored. **Parts Used:** Packing material, flow meter batteries, chemical injection supplies. **Parts Needed:** Stuffing box kit for North C1, dump valve assembly for North D3. **Vehicle Issues:** None.

Section 5: Observations & Feedback

Productivity: 22 of 24 stops completed in 8.7 hours. Route sequencing saved ~45 min vs. last week. Skipped stops (North K3, North J4) were T3 visual-only; deferred to tomorrow with no production risk. **Tier Movement:** North H6 showing consistent decline for 3 months - recommend T3 reclassification review. **Morning Meeting Feedback:** North B2 production drop was not flagged in SCADA overnight report. Suggest lowering exception threshold on T1 wells from 30% to 20% decline trigger.

Gold in the Details: End-of-shift reports are not paperwork - they are the source material for tomorrow's optimization.

The Technology Stack What Powers Modern Field Operations

Field operations are now driven by seven integrated technology layers. Each layer solves a specific problem, and together they create the data ecosystem that makes real-time optimization possible.

Layer	Function	Key Players	WorkSync Integration
1	SCADA & Real-Time Monitoring	CygNet (Weatherford), Ignition (Inductive Auto), Emerson, ABB, Honeywell	OPC UA/Modbus ingestion (64-66% cloud adoption)
2	Field Data Capture & Mobile	eVIN (IFS/Merrick), P2 Suite (IFS), PakEnergy, Quorum, GreaseBook	Real-time sync, offline capability, 8-min learning curve
3	Field Ticketing & Dispatch	Enverus OpenTicket, FieldEquip, Engage Mobilize	Job creation, crew routing, 20% cost reduction
4	Route Optimization	Route4Me, NextBillion.ai, Skedulo	Economic value-based optimization, 9x average ROI
5	Artificial Lift Optimization	ChampionX XSPOC, Ambyint, Weatherford	Pump card analysis, 25M+ global cards, 3-5% production gain
6	GPS Fleet & Safety	Verizon Connect, Geotab, Blackline G7	Real-time location, geofencing, lone worker protection
7	Analytics & Decision Support	AVEVA PI (OSIsoft), Spotfire, Power BI, Databricks	Predictive analytics, economic modeling, dashboards
8	ERP & Production Accounting	SAP IS-Oil/PRA, Oracle Cloud ERP, Avocet (SLB)	Cost centers, revenue, decline curves via REST/DB

How Major Operators Run Field Operations

Industry leaders have moved beyond spreadsheet management and manual routing. They operate with real-time economic models, automated dispatch, and centralized visibility.

Devon Energy: Exception-Based Operations

6.5M data points, 10,000+ updates/second. Devon runs exception-based operations: if all is normal, no visit required. Only anomalies trigger field response. **Result: 100-120% pump time improvement, 15-30% task productivity gain, 5% production improvement** from centralized gas lift optimization.

EOG Resources: Technology Saturation

165 proprietary and third-party technologies. EOG combines data from SCADA, IIoT sensors, seismic interpretation, drilling optimization, and production data into proprietary AI models. They treat operational technology as a competitive advantage.

Occidental: Automated Well Management

Nexus manages 27,000 wells automatically. Occidental's Nexus system prioritizes work orders dynamically, routes technicians optimally, and tracks 2x more wells per analyst. Over 50% of US onshore employees now work with centralized operational intelligence.

ExxonMobil: Autonomous Operations

OPA Platform, 20% cost reduction target. ExxonMobil is deploying autonomous systems that handle routine operations without human intervention. Digital twins predict failure modes, and automated decisions execute repairs before problems occur. \$15B savings target by 2027.

ConocoPhillips: Digital Twins

90% reduction in preventive maintenance check time, \$30K savings per well, 4x ROI. ConocoPhillips builds digital twins of every producing asset. Predictive models eliminate most routine checks, and technicians respond only when the twin predicts failure is imminent.

Best Practices

The Daily Rhythm That Works

The following practices, implemented daily, separate high-performing field operations from reactive ones. They are not optional - they are the operating system.

- 1. Never let a Tier 1 well sit unvisited.** If a Tier 1 well shows an exception, it gets visited that day. No tomorrow, no exceptions.
- 2. Track windshield time weekly.** If operators spend more than 30% driving, routes need restructuring immediately.
- 3. Rotate operators across areas monthly.** Prevents knowledge silos and develops flexible workforce capability.
- 4. Review tier assignments monthly.** Use end-of-shift reports to identify wells that have moved economically.
- 5. Make end-of-shift reports mandatory.** No report, no dispatch next day. This creates accountability.
- 6. Track daily completion rates by operator.** What gets measured gets managed. Target 95%+ completion rate.
- 7. Celebrate wins publicly.** When an operator delivers 100% completion with <25% windshield time, everyone knows it.

Best Practice Benchmarks

Metric	Reactive Ops	Best Practice	World Class
Morning Meeting	45-60 min	30 min	15 min (confirmation only)
Windshield Time	40-50%	<30%	<20%
Route Completion	70-80%	>95%	>98%
Tier 1 Response	Next day	<4 hours	<1 hour
Data Entry Lag	24-72 hours	Same day	Real-time mobile
Deferred Production	15-20%	4-8%	<3%

The Market Gap Where the Industry Falls Short

Most field operations platforms are incomplete. They solve one problem and hand off to the next system. None integrate all seven technology layers into a single operational model.

What Operators Still Do Manually

Route planning by memory: Superintendents build routes in their heads, based on gut feel and experience. No economic model. No optimization.

Paper-based data capture: Field crews write on clipboards, drivers transcribe by hand, data enters systems days later.

Calendar-based maintenance: "We visit well XYZ every Wednesday" regardless of production anomalies or economic value.

Manual transcription: Data captured in one system, re-entered in another. Delays create decision lag.

Industry Data Gaps

70% of companies lack visibility into asset maintenance status. Most systems track WHAT was done, not WHEN it needs doing.

Most scheduling tools optimize by distance or time, not economic value. A 2-hour drive to a Tier 3 well looks the same as a 10-minute drive to a Tier 1 well.

Most production tools focus on data capture, not crew management. They tell you what happened, not what to do about it.

No platform combines production economics + route optimization + field dispatch in a unified system.

The Cost of Disconnected Systems

When systems don't talk to each other, the cost is measured in operator hours, not IT budgets:

Gap	Daily Impact per Operator	Annual Impact (20 Operators)
Manual route building	45-75 min/day in spreadsheets	3,750-6,250 hours/year
SCADA-to-dispatch lag	2-4 hour response delay	\$500K-\$2M deferred production
No economic prioritization	Visits based on habit, not value	15-20% wasted effort on low-tier wells
Paper-based reporting	30-45 min data re-entry	2,500-3,750 hours/year
No closed-loop feedback	Same mistakes repeated	Continuous improvement never starts

Where Existing Platforms Fall Short

Each major platform in the oil and gas technology stack excels in one area but leaves critical gaps in crew management, economic prioritization, and field dispatch. The table below shows where the industry's leading tools stop — and where WorkSync begins.

Platform	What It Does Well	What It Does NOT Do
CygNet / Ignition	SCADA monitoring, alarm management	No economic prioritization or crew routing
eVIN / P2 Suite	Field data capture, production reporting	No AI-driven route optimization
XSPOC / Ambyint	Artificial lift pump optimization	No full field crew management
SAP IS-Oil / Oracle	Financial accounting, ERP processes	No real-time field dispatch or mobile ops
AVEVA PI	Data historian, 2B+ tags globally	No crew management or task prioritization
PakEnergy / Quorum	Production accounting, cloud SCADA	Weak economic routing, limited AI/ML

The Integration Opportunity

These platforms are not competitors — they are data sources. WorkSync uses overlay architecture to read from each system without replacing it. CygNet provides SCADA data, XSPOC provides pump card analysis, SAP provides financial context, and AVEVA PI provides historical trends. WorkSync combines all of it into a single economic prioritization engine that tells field crews exactly where to go and why.

The mid-market (300-5,000+ wells) is underserved. Too small for enterprise custom development, too complex for spreadsheet management. WorkSync fills this gap with an intelligence layer that overlays existing systems.

Implementation Roadmap

Getting Started with Crew Management

The transition from reactive to proactive field operations doesn't happen overnight. A phased approach reduces risk and builds team confidence in new processes.

Month 1: Foundation & Data

Week 1-2: Audit current well portfolio. Classify wells into preliminary tiers based on production data. Identify top 50 Tier 1 wells that will drive initial focus.

Week 3-4: Establish morning meeting cadence. Start with 30-minute format and leadership attendance. Document current routes and windshield time baseline. Implement basic end-of-shift reporting (paper or simple spreadsheet).

Month 2: Process & Training

Week 5-6: Formalize escalation protocol. Train all superintendents and field crews. Establish Central Command function with primary and backup coverage.

Week 7-8: Implement three-check-in model (morning, mid-day, EOD). Begin tracking completion rates and windshield time by operator. Train on route optimization principles.

Month 3: Tools & Optimization

Week 9-10: Deploy GPS fleet tracking and basic mobile app for end-of-shift reporting. Verify data accuracy before relying on it for decisions.

Week 11-12: Analyze 8 weeks of completion rate and windshield time data. Identify operators performing above/below baseline. Adjust tier assignments based on actual economic performance.

Success Metrics (Month 3)

Metric	Target	Method
Completion Rate	>95%	Count completed stops vs. assigned stops
Windshield Time	<30%	GPS tracking shows time-in-motion vs. time-on-site
Tier 1 Response Time	<4 hours	Time from exception alert to on-site arrival
End-of-Shift Reports	100%	One report per operator per day without exception
Morning Meeting Adherence	100%	Meetings start on time, run <=30 minutes

Common Pitfalls and How to Avoid Them

Field operations that fail usually fail for the same reasons. Here are the most common pitfalls and how to guard against them.

Pitfall 1: Morning Meeting Creep

What happens: Morning meeting starts at 30 minutes and gradually expands to 45-60 minutes. Superintendents add status reports, production discussions, equipment updates. Soon the meeting consumes the entire morning.

Guard against it: Set a hard 30-minute limit with a visible timer. If discussion runs long, schedule a separate meeting. Morning meeting is FOR DECISIONS, not FOR UPDATES. Updates happen asynchronously in the pre-meeting prep.

Pitfall 2: Static Tier Assignments

What happens: Tiers are set once in January and never revisited. A well that was Tier 1 in Q1 declines into Tier 3 by Q4, but crews still visit it three times per week.

Guard against it: Review tier assignments monthly using economic data. Use end-of-shift observations about well status to spot tier movement. Build tier review into the monthly planning cycle.

Pitfall 3: Poor Route Consolidation

What happens: Routes are built geographically without considering productivity. An operator spends 3 hours driving to visit 4 wells scattered across a county.

Guard against it: Use economic value per stop as the primary optimization parameter. Accept some geographic inefficiency for economic efficiency. A 15-minute drive to a \$2,000/day well is better than a 5-minute drive to a \$100/day well.

Pitfall 4: Weak Central Command

What happens: No one has clear authority to make resource allocation decisions in real-time. Operators call in issues but nobody redirects them or dispatches specialists. Work piles up.

Guard against it: Assign a single individual with explicit authority as Central Command during each shift. That person makes all routing decisions, escalation decisions, and specialist dispatch decisions. Provide them with real-time visibility tools and decision-support data.

Pitfall 5: Technology Without Process

What happens: Company deploys expensive route optimization or mobile dispatch software, but operators continue submitting handwritten notes and manual transcription continues.

Guard against it: Technology requires process discipline. Make end-of-shift reporting mandatory. Enforce mobile app usage. Require real-time status updates. Don't deploy tools until the team is ready to use them correctly.

Frequently Asked Questions

Q: How do we handle emergency calls that disrupt the planned route?

A: Emergency calls route through Central Command, who re-prioritizes the route and makes specialist dispatch decisions. The original route continues unless the emergency is on a higher-tier well. Document the change in end-of-shift report.

Q: What if a Tier 1 well requires a specialist we don't have available?

A: This is a capacity planning decision. If you regularly don't have specialist availability for Tier 1 wells, you've misclassified the wells (they're not really Tier 1) or you need more specialist staff.

Q: How do we manage operator performance variation?

A: Track completion rate, windshield time, and quality metrics by operator. High performers get premium routes. Low performers get coaching and support. Celebrate and compensate high performance.

Q: Should we use 100% economic prioritization or include geographic clustering?

A: Start with pure economic prioritization. Then apply geographic clustering as a secondary constraint. The sweet spot is usually 70-80% economic value, 20-30% geographic optimization.

Q: How do we know if windshield time is too high?

A: Establish a baseline for your geography. Rural operations may run 35-40% windshield time. Urban/clustered operations should hit 20-25%. Track weekly. If trending up, route restructuring is needed.

Q: What's the minimum number of wells to make tier-based management worth it?

A: 50+ wells. Below that, simple priority lists work fine. Above 50, tiers create significant economic benefit.

Q: How often should we review this entire system?

A: Monthly minimum. Quarterly deep-dive. Annual strategy review. Real-time monitoring, monthly tactical adjustment, quarterly strategic review.

Q: How do we handle seasonal production swings affecting tier assignments?

A: Build seasonal adjustment into your monthly tier review. Winter gas wells may tier up while summer oil wells tier down based on commodity pricing. Use rolling 30-day economics, not static annual averages.

Q: What training do operators need before we implement this system?

A: Two hours maximum. Cover three things: how tiers work (30 min), how to read the morning route (30 min), and how to submit end-of-shift reports (30 min). Then ride along for the first two days. Operators learn by doing, not by sitting in a classroom.

Key Metrics Dashboard What to Track and Monitor

Real-time visibility into field operations requires tracking specific metrics. These metrics should be reviewed daily by Central Command and weekly by leadership.

Daily Metrics (for Central Command)

Metric	Why It Matters	Target
Dispatch Confirmation Rate	Did all operators confirm receipt of route?	100%
Route Adherence	Did operators follow assigned sequence?	>95%
Mid-Day Check-In Rate	Did all operators report status at 4-hour mark?	100%
Escalations Logged	How many exceptions were documented?	Trending baseline
Task Completion Rate	What % of assigned stops were completed?	>95%

Weekly Metrics (for Shift Supervisors)

Metric	Why It Matters	Target
Avg Windshield Time %	Route efficiency - are we driving too much?	<30%
Tier 1 Response Time	How fast do we reach high-value exceptions?	<4 hours
Completion Rate by Operator	Which operators are most productive?	>95%
End-of-Shift Report Rate	Are crews documenting work completely?	100%
Tier Movement	Wells moving up or down?	Track trends

Monthly Metrics (for Operations Leadership)

Metric	Why It Matters	Target
Cost Per Well Visit	Economics of field operations	Baseline + trend
Production per Operator Hour	Crew productivity change	Uptrending
Specialist Deployment Rate	Utilization of high-cost resources	Optimize
Safety Incidents	Lone worker safety performance	Zero target
Tier Assignment Accuracy	Are wells still correctly classified?	Review monthly

Implementation Tip: Start with daily metrics only. Add weekly metrics after Week 2 once operators are comfortable with the rhythm. Introduce monthly metrics in Month 2. Trying to track everything from Day 1 overwhelms the team and produces unreliable data. Build the measurement habit before expanding the measurement scope.

The best metric is the one your team actually reviews every day. Start with three daily metrics. Get those right. Then expand. A dashboard nobody looks at is worse than no dashboard at all.

Technology Integration Building Your Integrated Stack

The right technology stack is not a single platform - it's an integrated set of best-of-breed tools that communicate seamlessly and serve the operational rhythm described in this guide.

Data Flow Architecture

Step 1: Production Data Ingest - SCADA systems (CygNet, Ignition, Emerson) stream production data to cloud historians (AVEVA PI, Snowflake, Databricks). Data arrives in real-time, 1-second granularity. eVIN and P2 Suite capture field measurements and production accounting.

Step 2: Exception Detection - AI/ML models run on production data to identify anomalies. XSPOC pump card analysis flags artificial lift issues. Thresholds are set by tier and well type. Exceptions trigger automated job creation.

Step 3: Economic Ranking - Jobs are ranked by economic impact using current commodity prices and decline curves from SAP IS-Oil/PRA or Oracle Cloud ERP. Top 10-15 jobs become today's priority stack for the morning meeting.

Step 4: Route Optimization - Route optimization engine (Route4Me, NextBillion.ai) clusters jobs geographically while maintaining economic priority sequence. Routes are sent to mobile app.

Step 5: Dispatch & Tracking - Central Command confirms routes and dispatches. GPS tracking provides real-time location and time-on-site. Mobile app collects field data that syncs to eVIN/P2 and production accounting.

Step 6: Closed-Loop Analytics - End-of-shift reports and field data feed back to AVEVA PI historians and analytics tools. Dashboard shows yesterday's outcomes, today's priorities, and tomorrow's forecast.

Integration is critical. A system with seven disconnected tools creates seven times the data entry burden. Your data platform should enable, not obstruct, the operational rhythm.

This Guide Works Even Better with WorkSync WellOPS

WorkSync's WellOPS automates the entire daily rhythm described in this guide. It is built specifically for field crew management in oil and gas operations.

WorkSync WellOPS automates the entire operational rhythm described in this guide:

Capability	How It Works	Impact
Dynamic Tier Classification	Real-time economics from SCADA + production accounting	Wells re-tiered daily based on actual cash flow
Route Optimization	Cash flow prioritization, not distance-based	Routes delivered to operators at 6 AM
Morning Meeting Support	Pre-built priority stacks and exception summaries	30-min meeting becomes 15-min confirmation
Central Command Dashboard	Real-time GPS, task status, SCADA exceptions	One person manages entire field in real time
Closed-Loop Reporting	Mobile end-of-shift feeds back to optimization model	System learns and improves daily
Overlay Architecture	Reads from CygNet, Ignition, XSPOC, SAP, AVEVA PI	No rip-and-replace, deploy in weeks

Deployment: 90 days using the 4-phase framework in this guide. **Integration:** Read-only overlay on your existing SCADA, CMMS, ERP, and production accounting systems. **Result:** Measurable ROI within the first quarter — 10-15% cash flow uplift, 30-40% fewer site visits, 20-30% drive mile reduction.

See how it works: work-sync.ai/contact

Questions? Email ops@work-sync.ai **or call** (918) 555-0100

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Conclusion

The Operational System

Field crew management is not a set of disconnected practices. It is an integrated operational system with clear roles, defined processes, consistent tools, and real-time visibility.

The well-managed field operation runs like a Swiss watch:

- Every well is classified by economic value
- Every day starts with a prioritized task list
- Every route is optimized for economic impact
- Every operator knows exactly what they should do and why
- Every exception is documented and escalated properly
- Every shift closes with a report that feeds tomorrow's decisions

The operators are not reactive. The superintendent is not a chaos manager. The company is not burning margin on inefficiency.

The Opportunity

Most field operations in the oil and gas industry have not optimized beyond 60-70% efficiency. The margin between "reactive" and "proactive" field operations is 15-25% in cost per well visit. For a mid-market operator managing 300-5,000+ wells, that represents \$2-10M in annual opportunity.

The systems and principles in this guide are not theoretical. They are proven in the field by Devon Energy, Occidental, EOG Resources, and ExxonMobil. They work at every scale - 50 wells or 50,000 wells.

Your Next Step

Start with the morning meeting. That single practice - 30 minutes of daily alignment focused on economic priorities - unlocks the rest of the system. Everything else flows from there.

Ready to build a world-class field operation?

Contact the WorkSync team at work-sync.ai/contact or email ops@work-sync.ai

Let's discuss how to apply these principles to your specific operation.

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