

CASE STUDY: QUORUM SOFTWARE

# Post Acquisition, Strategically Merging Multiple Brands into One Unified Web Presence



## CLIENT INFO

**Customer:** Kyle Priest, EVP & Chief Marketing Officer

**Company:** Quorum Software


**Industry:** Oil & Gas Enterprise Software

**Author:** Jen Gordon

**Publish Date:** January 5, 2022

## DELIVERABLES

 Persona Definition

 User Experience

 User Journey

 Conversion Optimization



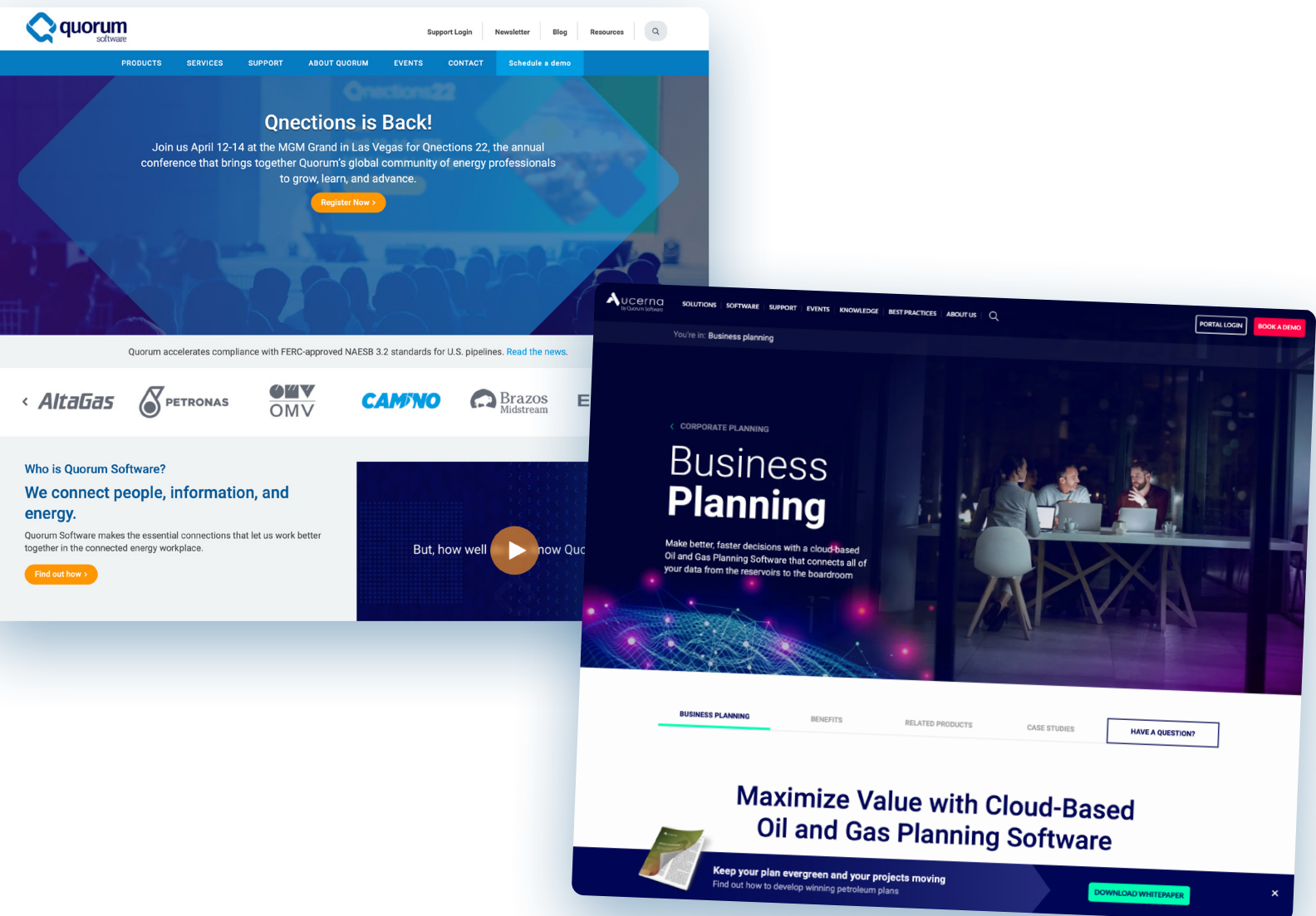
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## THE CHALLENGE

# How Do We Strategically Merge Multiple Brands into One Unified Web Presence Post Acquisition?

After acquiring several competitive software companies in the oil and gas space, this is the question Quorum Software faced.



## Overview

Quorum Software connects people and information across the energy value chain with business workflows that optimize profitability and growth. They merged with Thoma Bravo portfolio company, Aucerna, and acquired a line of business from TietoEVRY to create a company 3x larger and were looking for a strategy to integrate their full suite of offerings under one unified web presence, Quorum Software.

Historically, Quorum offered Vertical Financial SaaS solutions for Oil & Gas (Energy) primarily to US companies. Aucerna offered similar Financial SaaS solutions sold throughout the Rest of the World (ROW). TietoEvry's Oil & Gas solutions (Energy Components) are also sold globally and are a complementary portfolio.

The new Quorum brand will offer a unified suite called the Quorum Energy Suite.




























## Discovery + Industry Research

In addition to independent research I performed on the oil and gas management industry, Quorum provided an inventory of existing assets and company specific data to fill in knowledge gaps:

- Personas
- Existing branding assets
- Tech stack inventory
- Current and sunsetted products & services
- SEO Reporting

I worked on a team with two additional strategists, with expertise in SEO, content strategy and technology stack analysis. Our roles overlapped slightly as we worked to make recommendations in the desired areas, but my primary focus was in the areas of User Journey, User Experience and Conversion Optimization.

Office 365

	Name ▾	Modified ▾
	BI Personas.pdf	November 24, 202
	BuyerPersonaInterviewGuidelines_1312.docx	November 24, 202
	BuyerPersonaWorksheet_1312.docx	November 24, 202
	BuyerPersonaWorksheet_Acct Mgr.docx	November 24, 202
	BuyerPersonaWorksheet_CEO.docx	November 24, 202
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	BuyerPersonaWorksheet_Landman.docx	November 24, 202
	BuyerPersonaWorksheet_LeaseAnalyst.docx	November 24, 202
	BuyerPersonaWorksheet_Midstream_Comm...	November 24, 202
	BuyerPersonaWorksheet_Midstream_Contr...	November 24, 202
	BuyerPersonaWorksheet_Midstream_Opera...	November 24, 202
	BuyerPersonaWorksheet_NT.zip	November 24, 202
	BuyerPersonaWorksheet_Transportation_Bu...	November 24, 202
	BuyerPersonaWorksheet_Transportation_IT...	November 24, 202
	BuyerPersonaWorksheet_Transportation_VP...	November 24, 202
	BuyerPersonaWorksheet_VP.DOCX	November 24, 202
	Energy Marketing Personas.pdf	November 24, 202
	LDC Personas.pdf	November 24, 202
	MASTER Quorum Buyer Personas - Last Up...	November 24, 202
	Measurement Personas.pdf	November 24, 202
	Midstream Personas.pdf	November 24, 202
	Pembina Summary.pptx	November 24, 202
	Production Ops Personas.pdf	November 24, 202
	Quorum Buyer Personas.docx	November 24, 202



Name ▾



Brand Folder



Personas



Products & Services



SEO Reporting



Tech Stack Inventory



Website Inventory

## Quorum Goals

Quorum's overarching goal was to create a high-performing marketing site for the new brand and build our digital presence and authority in the industry, with the primary goal of generating new client leads.

To deliver a digital web strategy inclusive of URL, SEO, UX and CMS that will inform the future state of a unified [www.quorumsoftware.com](http://www.quorumsoftware.com), the digital strategy also addressed the following questions:

### Digital Strategy

- How do we get to an effective [www.quorumsoftware.com](http://www.quorumsoftware.com) for Q1 and beyond?
- What is the migration path for not just the [Aucerna.com](http://Aucerna.com) & EC/D websites, but other active, formerly acquired company and/or product sites?
- How can we better align with sales and demand gen goals?
- How to support the overall Quorum story and reflect the new positioning for Quorum and other family friends?

### CMS/Martech Stack

- Is current Umbraco CMS adequate for: the type of company Quorum is and the needs we have for multiple marketers/web dev/creative teams to work within?
- Are the current web update processes and workflows appropriate? What are the present roadblocks and challenges?
- Is the current, comprehensive stack being used wisely in relation to the CMS (landing page choice, audience building, remarketing)?

### Content Strategy

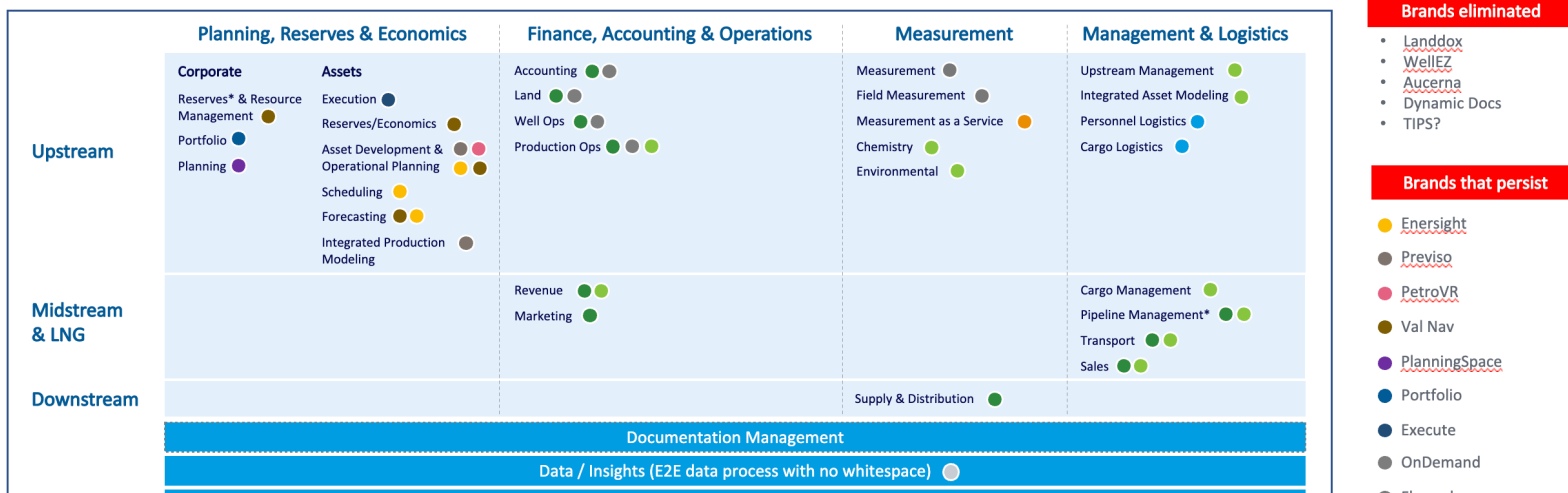
- What is the content strategy process that needs to be implemented to maintain authority levels in US & ROW as we create and build equity and authority for Quorum worldwide?

*By the end of this project, Quorum had a clear understanding of the process and deliverables needed to roll out a MVP of their new site, as well as the team members needed to execute the plan.*

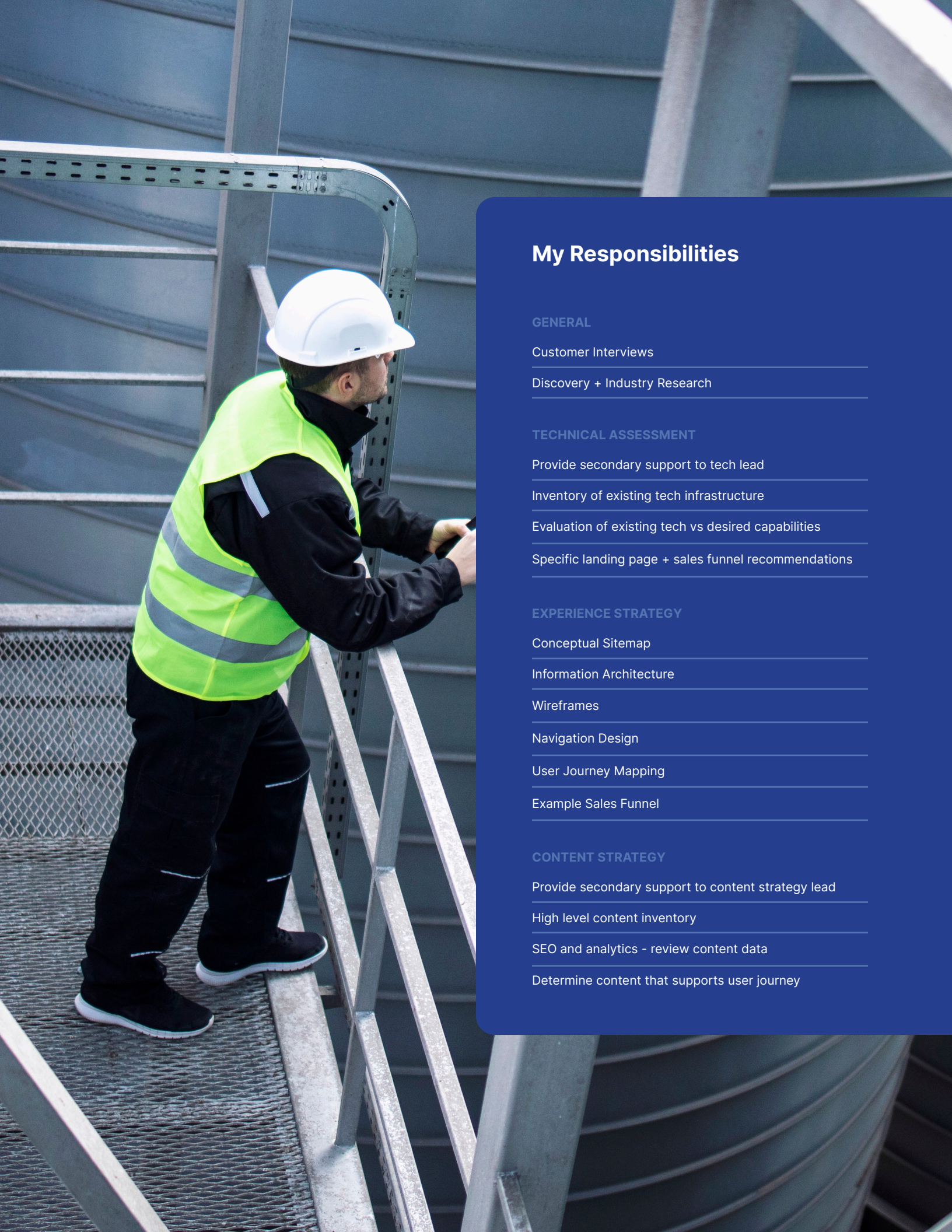
Part of the user experience and user journey work involved understanding the consolidation of products and services that happened during the merger, and which personas correlated to various solutions.

## Quorum Energy Suite

1. Finalize convention - Prod & Services
2. Review with Sales & Service Leaders
3. Build program in Brand Committee
4. Review/approve for all
5. Map to CRM for Post P1 Go Live







## My Responsibilities

### GENERAL

Customer Interviews

Discovery + Industry Research

### TECHNICAL ASSESSMENT

Provide secondary support to tech lead

Inventory of existing tech infrastructure

Evaluation of existing tech vs desired capabilities

Specific landing page + sales funnel recommendations

### EXPERIENCE STRATEGY

Conceptual Sitemap

Information Architecture

Wireframes

Navigation Design

User Journey Mapping

Example Sales Funnel

### CONTENT STRATEGY

Provide secondary support to content strategy lead

High level content inventory

SEO and analytics - review content data

Determine content that supports user journey



# Sitemap



Two versions of the sitemap included a text, Google Doc version and a visual layout created in Octopus.do.

## Challenges

- ! How can site content be categorized into flows that achieve the primary objective of generating new leads?
- ! How can the content be organized for cross-selling opportunities to existing customers?
- ! How can a large number of products and services be grouped into buckets most visitors will understand?

### Global Nav

- **Products**
  - **By Function**
    - **Planning, Reserves & Economics**
      - Corporate Planning
        - Reserves & Resource Management
        - Portfolio
        - Planning
      - Asset Planning
        - Execution
        - Reserves/Economics
        - Asset Development & Operational Planning
        - Scheduling
        - Forecasting
        - Integrated Production Modeling
    - **Finance, Accounting & Operations**
      - Accounting
      - Land
      - Well Ops
      - Production Ops
      - Revenue
      - Marketing
    - **Measurement**
      - Measurement
      - Field Measurement
      - Measurement as a Service
      - Chemistry
      - Environmental
      - Supply & Distribution
    - **Management & Logistics**
      - Unstream Management

Finance,  
Accounting &  
Operations

Header

Planning,  
Reserves &  
Economics

Header

Corporate Planning

Reserves &  
Resource  
Management

Portfolio

Planning

Asset Planning

Execution

Reserves

Asset Development  
& Operational  
Planning

Scheduling

Forecasting

Integrated  
Production  
Modeling

Newsletter  
Subscribe

Footer

Corporate  
Planning

Header

Case Studies /  
Client Logos

Reserves &  
Resource  
Management

Portfolio

By Function

Header

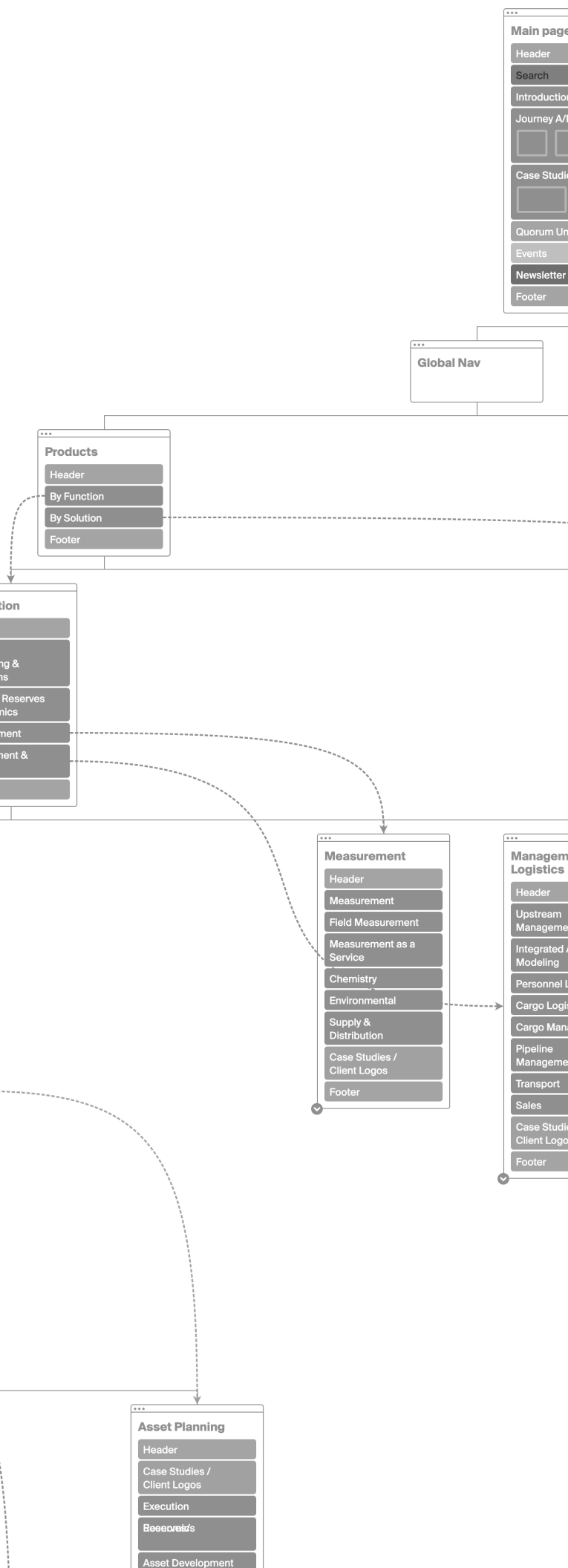
Finance,  
Accounting  
Operations

Planning,  
& Economics

Measurement

Management  
Logistics

Footer



## Process

- 1 Discussion and analysis of current website content inventory with Quorum's sales and marketing team
- 2 Competitive analysis to determine common industry vocabulary
- 3 Digital card sorting exercise to collaborate on content grouping
- 4 Development of taxonomies organize and classify information

## Deliverables & Recommendations

### DELIVERABLES

Content Inventory

Content Grouping + Hierarchy

Cross-link Definition

Blog/Resources Content Filters

### RECOMMENDATIONS

Based on GA data, it appears existing clients login directly to their admin portals, without hitting the quorumsoftware.com website, therefore we recommend organizing the sitemap to focus on new visitor lead gen:

- Place client-centric links in tertiary navigation (Client Login, Support, Training)
- Elevate visibility of Case Studies to further educate visitors on client success stories
- Elevate visibility of Events to increase accessibility for new visitors engagement
- Under "Products" heading, give visitors the ability to navigate by solution/product name or by functional area

# Navigation



## Challenges

- ! How do we navigate new visitors that have a wide array of needs and motivations (end user, influencer, buyer, C-Level execs)?
- ! How do we navigate existing clients to education that opens up cross-selling opportunities?
- ! How do we navigate visitors to content where interactions begin assigning points that further qualify the visitor as a quality lead.



### By Function

Planning, Reserves & Economics >  
Finance, Accounting & Operations >  
Measurement >  
Management & Logistics >

### By Solution

CoastalFlow  
DaWinci  
Energy Components  
EnergyIQ  
Energisight

About | Resources | Contact | [Client Login](#) ▼



[Products](#) ▼ | [Services](#) | [Case Studies](#) | [E](#)

### By Function >

### Planning, Reserves & Economics >

### Corporate Planning >

### Execution

### By Solution >

### Finance, Accounting & Operations >

### Asset Planning >

### Reserves/Economics

### Measurement >

### Management & Logistics >

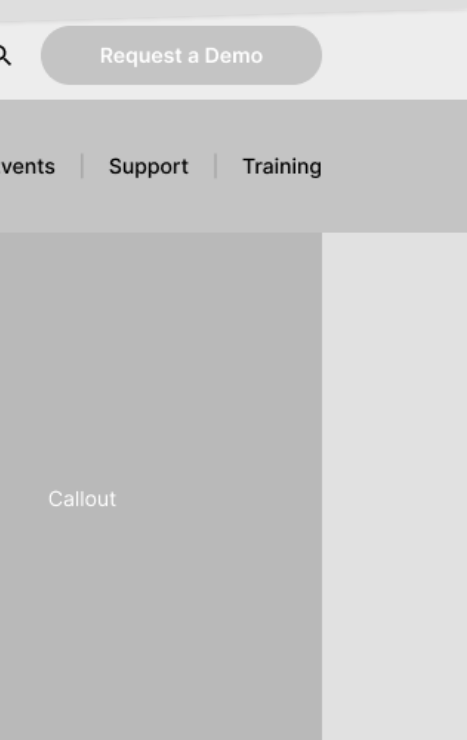
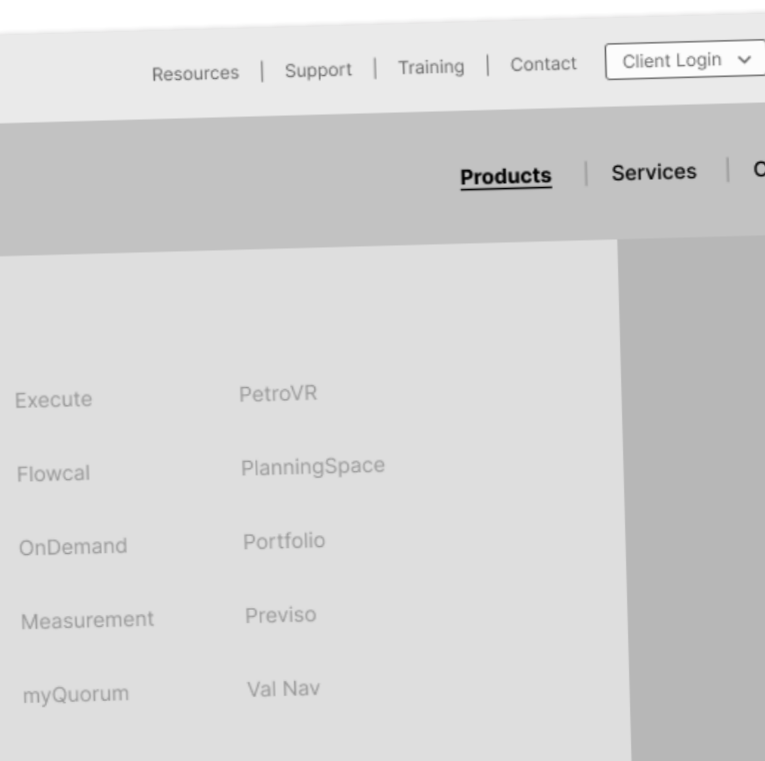
### Asset Development & Operational Planning

### Scheduling

### Forecasting

### Integrated Production Modeling

Iterations of primary, tertiary and mega menu navigation design developed in Figma.



## Process

- 1 Analysis and discussion of Google Analytics nav data with Quorum's internal team to determine priority labels
- 2 Competitive analysis to determine industry naming conventions
- 3 Development of nomenclature that ensures ease of navigation as site content grows
- 4 3 Click Rule Analysis- are visitors able to find desired content within 3 clicks/taps?

## Deliverables & Recommendations

### DELIVERABLES

Naming Convention Definition

Navigation Taxonomy & Organization

Mega Menu Layouts

Tertiary Client Facing Navigation

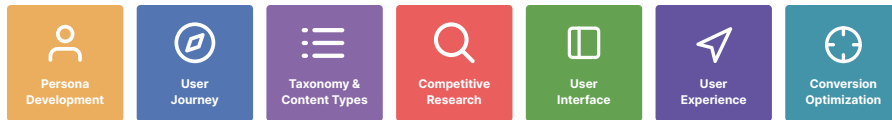
### RECOMMENDATIONS

For the initial MVP, it's recommended the navigation and sub navigation be housed in a mega menu that reveals appropriate subcategories upon hover.

To improve usability and avoid deep nested menus in the global nav, primary nav categories link visitors to a category page with relevant links to subcategories/subpages along the top.

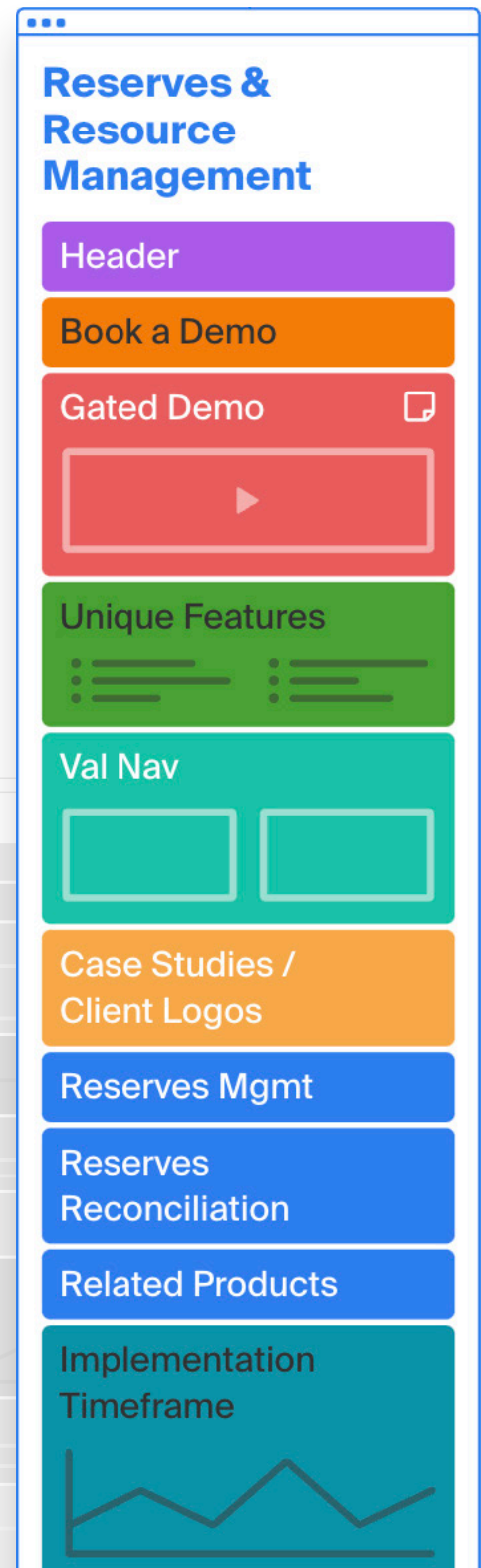
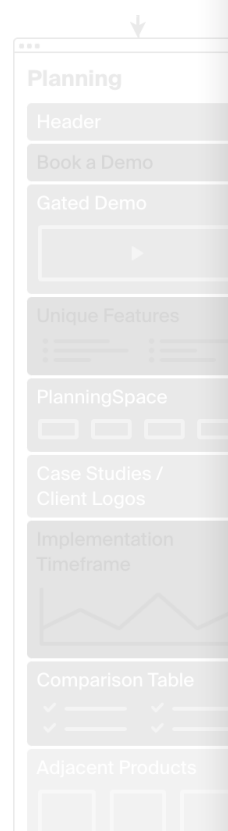
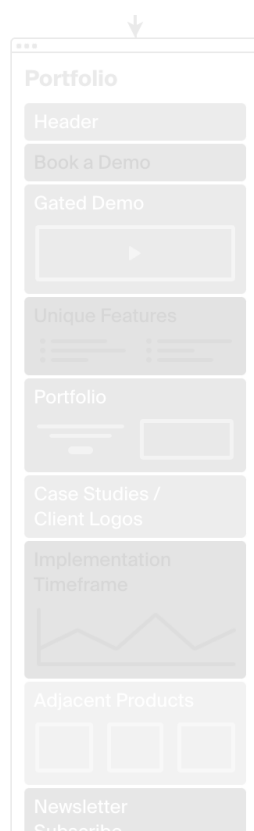
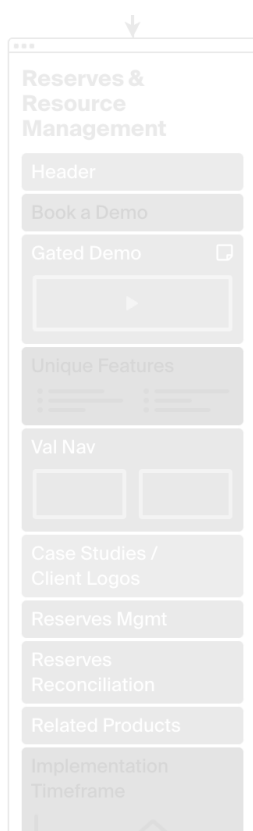
Example: Products > By Function > Planning Reserves & Economics  
← links to landing page with additional category relevant links rather than additional subcategories in the global nav.

# Wireframes



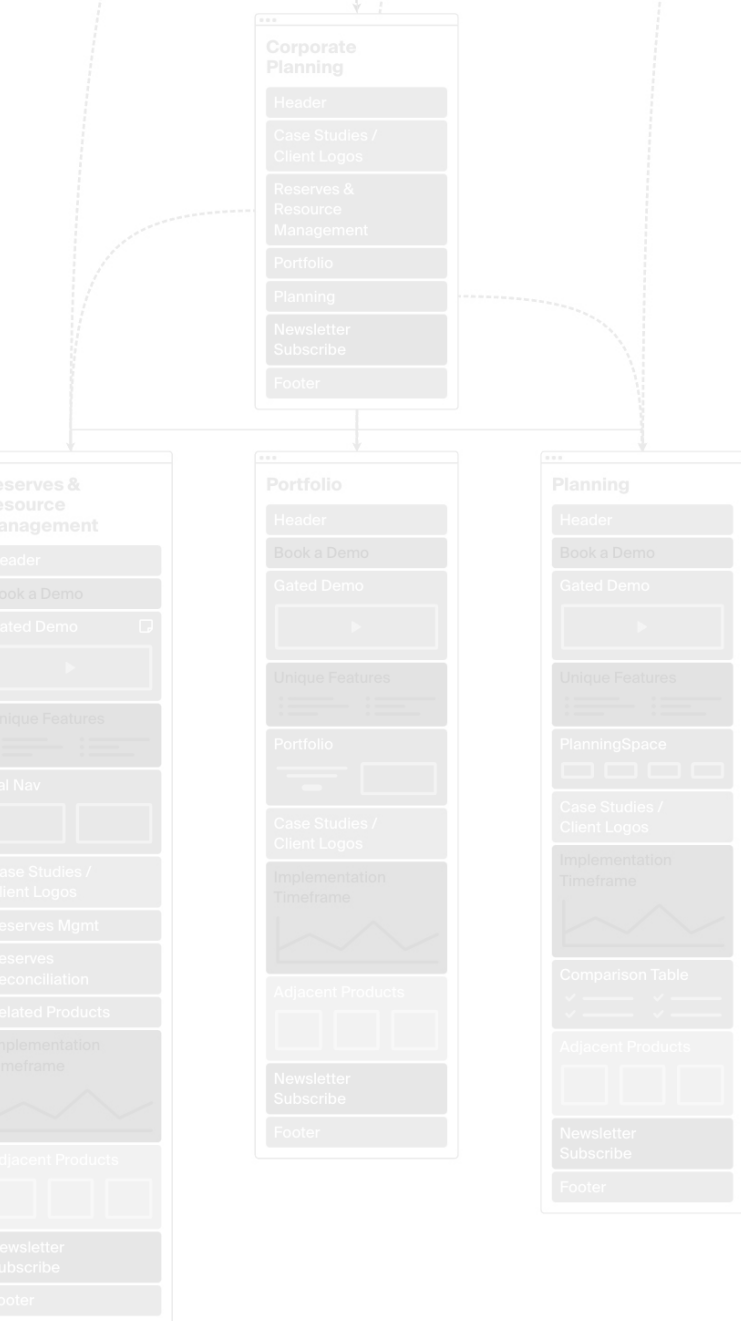
## Challenges

- ! To achieve the goal of generating leads, which content modules must be built to move visitors into appropriate funnels?
- ! How are optin modules differentiated and catered to specific audiences?
- ! How is the heirarchy of these content modules decided upon to optimize for conversions?





This preliminary set of high-level wireframes were created to get the conversation started around content and conversion optimization.



## Process

- 1 Research on Aucerna and Quorum's existing lead gen funnels
- 2 Analysis of how visitors being segmented by desired outcome
- 3 Development of content heirarchy that routes visitors to desired content
- 4 Outlining content modules that address visitor questions and objections

## Deliverables & Recommendations

### DELIVERABLES

Content Module Definition

Cross-Selling Modules

Optin Module Definition & Hierarchy

High-level wireframes

### RECOMMENDATIONS

Priority modules include: General hero carousel, Featured case studies, journey (problem/solution) callouts, events modules, product features module, client testimonials, gated demos, implementation timeframe, related products carousel, newsletter subscribe, optin callout boxes.

Example Page Template recommendations: Page with navigation, Page w/o navigation (landing page), Product, Services, Case Studies, Blog, Resources, Blog & Resources Category Page, Blog & Resources Post Page, Opt-in Template, Events, Archive of Events, Search Results Template

Adjacent Products

Newsletter  
Subscribe

Footer

Implementation  
Timeframe

Adjacent Products

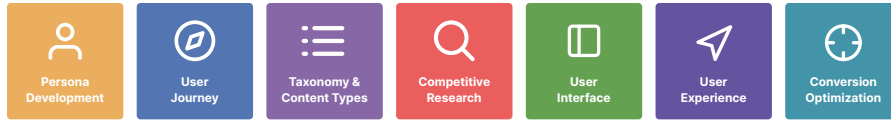
Insight into the  
entire life of your  
asset

Surface network  
modeling

Evaluate scenarios

Choose the best

# Journey Maps



## Challenges

- ! How do we provide a smooth user experience for visitors with different motivations and content needs?
- ! Currently no clear delineation of goals and user path for various personas.
- ! No testing of conversion optimization strategies that give a clear baseline of past site performance.

## USER PROFILE

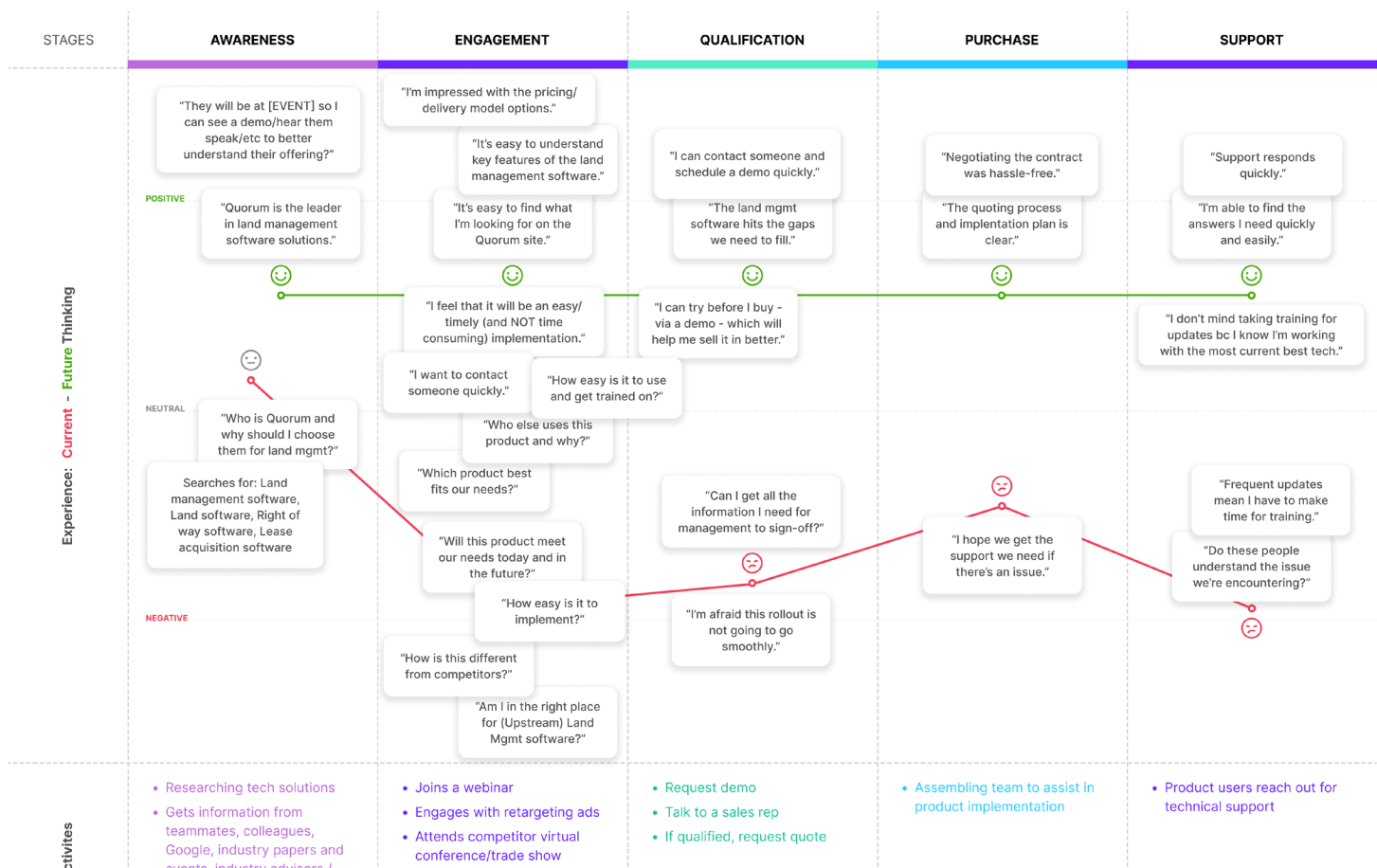


### OUTGROWN EXCEL

I am the buyer, influencer, and user  
I ask peers and field personnel for recommendations  
I search for point solution online (i.e. "land management software")

### SCENARIO

Robert is the operations leader in an Oil and Gas company. He's a male aged 40 – 55 and is a P.Eng. With a moderate tech skill level he relies on his peers and IT departments for business systems integrations. In his work, Owen can be a VP Operations or Manager Operations.



STAGES	AWARENESS	ENGAGEMENT	QUALIFICATION	PURCHASE	SUPPORT
	<p>"They will be at [EVENT] so I can see a demo/hear them speak/etc to better understand their offering?"</p> <p>POSITIVE</p> <p>"Quorum is the leader in land management software solutions."</p> <p>😊</p>	<p>"I'm impressed with the pricing/delivery model options."</p> <p>"It's easy to understand key features of the land management software."</p> <p>"It's easy to find what I'm looking for on the Quorum site."</p> <p>😊</p>			
	<p>These user journey flows helped us work with Quorum to identify visitors mindsets at various phases of the journey.</p>				
Experience: <b>Current</b> - <b>Future</b>	<p>NEUTRAL</p> <p>"Who is Quorum and why should I choose them for land mgmt?"</p> <p>Searches for: Land management software, Land software, Right of way software, Lease acquisition software</p> <p>NEGATIVE</p>	<p>"How easy is it to use and get trained on?"</p> <p>"Who else uses this product and why?"</p> <p>"Which product best fits our needs?"</p> <p>"Will this product meet our needs today and in the future?"</p> <p>"How easy is it to implement?"</p> <p>"How is this different from competitors?"</p> <p>"Am I in the right place for (Upstream) Land Mgmt software?"</p>			
User Activities	<ul style="list-style-type: none"> <li>Researching tech solutions</li> <li>Gets information from teammates, colleagues, Google, industry papers and events, industry advisors / consultants</li> <li>Comparing features</li> <li>Reading Quorum website</li> </ul>	<ul style="list-style-type: none"> <li>Joins a webinar</li> <li>Engages with retargeting ads</li> <li>Attends competitor virtual conference/trade show</li> <li>Reading on Quorum blog/resources section</li> </ul>			
Obstacles	<ul style="list-style-type: none"> <li>Dislikes software that enforces rigidity.</li> <li>No previous opportunities to evaluate the solution</li> <li>Hard to quantify the end benefits compared to their goals</li> </ul>	<ul style="list-style-type: none"> <li>Competitors claim they can do everything we do</li> </ul>			
Touchpoints	<p>Website —————</p> <p>Sales Rep ●</p> <p>Webinar ●</p> <p>Conference ●</p> <p>Advertising —●</p>	<p>Website —————</p> <p>Sales Rep ●</p> <p>Webinar —●</p> <p>Conference ●</p> <p>Advertising —●</p>			
Opportunities	<ul style="list-style-type: none"> <li>Land Management software content pushed to all channels</li> <li>Organic, paid search, SEO, SEM, media buys</li> <li>Optin: 5 Keys to Successfully Choosing a Land System</li> <li>Optin: Conference recording</li> </ul>	<ul style="list-style-type: none"> <li>Optimize on-site search</li> <li>Product detail page with key features, case studies and CTA to get a demo or talk to a sales rep</li> <li>Optin: Implementing a Cost Effective Land Solution</li> <li>Optin: Quorum's Land On Demand</li> <li>High-level talking points for budget holders</li> <li>Case studies on product vs. competition</li> <li>Product/position need and want quizzes (what are the top 3 things you need help</li> </ul>			

## Process

- 1 Discussion with Quorum team about personas and how they may be grouped to more efficiently move them through the sales pipeline.
- 2 Review of existing campaigns to determine priority campaigns to begin testing.
- 3 Research on inner dialogue of each personas as they move through each step in the user journey.
- 4 Develop relevant content/optin recommendations for each step in the user journey to continue moving them through the funnel.

## Deliverables & Recommendations

### DELIVERABLES

- User Journey for C-Level Executive
- User Journey for End User Persona
- Sample Visitor Inner Conversations to Test
- Optin Recommendations for Each Phase of Journey

### RECOMMENDATIONS

- Identify most common inner narrative for each phase in the consideration → purchase process. (Confirm assumptions in our journey maps.)
- Identify gaps in messaging and content to address visitor questions & concerns
- Run performance review of existing lead magnets
- Based on learnings from gap analysis and performance review, develop content plan to address visitors concerns and further educate them on solutions
- Present assessments that further qualify visitors
- Present visitors a vision of their future with Quorum
- Illustrate implementation paths
- Outline the expectations for ongoing support

## Outcomes

- ✓ Tech stack migration path defined
- ✓ Content strategy - organization and consolidation
- ✓ Content migration recommendations
- ✓ Definition of navigation paths
- ✓ High level wireframes for content layout
- ✓ Conversion optimization strategies
- ✓ User journey definitions to meet lead gen goals
- ✓ Implementation roadmap for MVP site

*Quorum is now set up to implement the next phase of the project, a MVP with all content migrations and tech stack recommendations implemented. Moving forward, further user journey planning and testing will be rolled out to confirm hypotheses made in the User Journey recommendations. The client was thrilled with how quickly our team jumped in to assist and make recommendations and we're looking forward to a successful rollout of the full site!*

## Questions?

*Looking to solve a similar problem? Happy to jump on a call to discuss in more detail how I can assist with your User Journey, Conversion Optimization and Customer Experiences!*

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### CLIENT INFO

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 User Experience

 User Journey

 Conversion Optimization



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