



# CHOOSING SOFTWARE FOR YOUR GEOLOGY TEAM

The 7 questions to demo success

*A guide for Exploration Managers.*

## About

Are you looking at drill program intelligence software or weighing up another type of software product for your exploration team?

Selecting a software provider is a big decision. Whether you've just begun your research or you're ready to start booking product demos, you might be wondering what questions you should be asking before signing on a dotted line.

If so, you've come to the right place!

This Guide was created for Exploration Managers who want to get the most out of an upcoming software demo. Use it to prepare for any type of software demo, from geoscience software, to geological database software, drill program intelligence software and more.

In the next few pages, we'll suggest seven simple questions every Exploration Manager needs to ask to cut through the marketing fluff. Use them to extract the answers (or lack of) that you need to make the right decision for your business. Print it out, scribble all over it, tweak the questions - it's up to you.

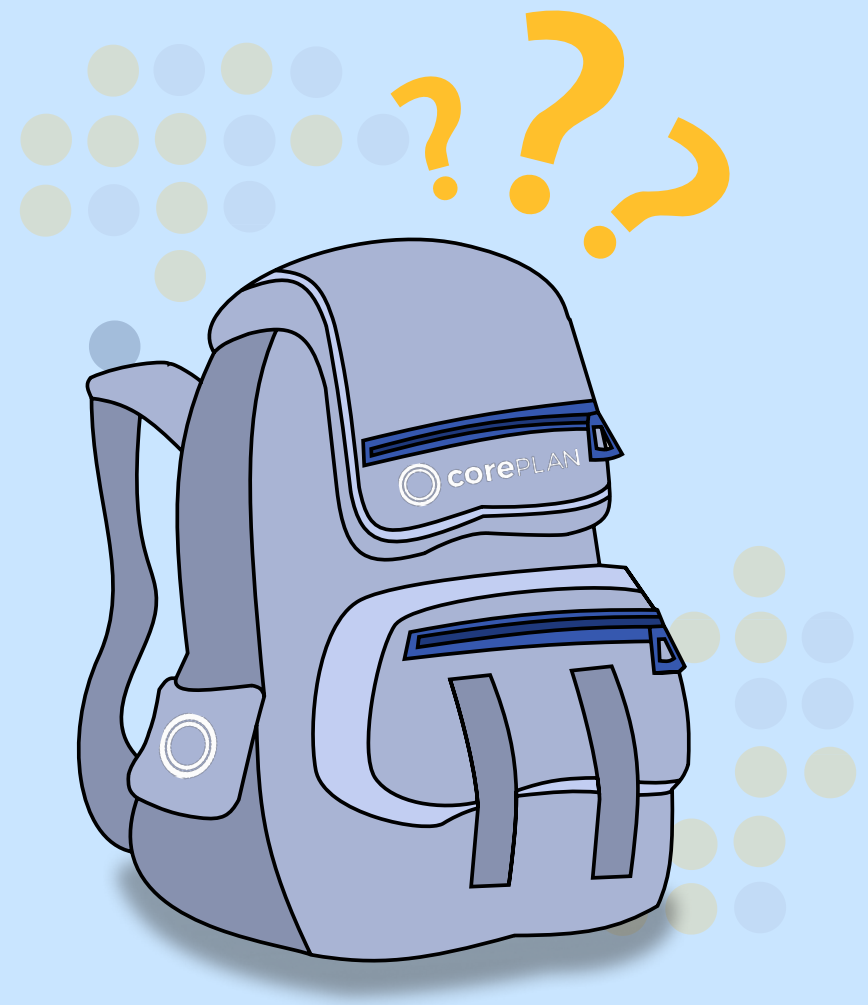
Get ready to go forth and conquer!

## Why listen to us anyway?

We know what you're thinking: *'you're a software company; why should I listen to you? You're just going to give us the questions you want us to ask, not the hard hitters!'*

We see your point. Let's unpack that real quick.

First and foremost, we spend a lot of our time in product demos with mining professionals. We quickly realised that not many of them have had the opportunity to use modern software in the workplace, except for common multi-purpose tools like Office 365 or Google Workspace (even though they might use it at home all the time - Netflix, we're looking at you).



How can we tell? We get to the end of the demo and we hear crickets. For us, that's not necessarily good news. Of course, we want customers, but they need to be the right customers. There's no point spending hours of your time and ours (not to mention your money) onboarding you only to find out once it's too late that the product doesn't align with the problems you are looking to solve. We are in the business of making our customers' lives easier, not harder. We want you to come to a meeting, whether with a competitor or us, knowing exactly what you're looking for so that you know if it's right for you when you see it.

As part of our product development process, we are always on the hunt for new SaaS products to try; this has meant we've sat through many demos. When it's time for us to try a new product, we go through a thorough vetting process and ask a lot of questions to help us decide what's right for us. We think we've come pretty close to nailing it at this point - and we figured, why not share it with you? For free. Just to say thanks for checking out our website.

We hope you'll use it to put us through our paces!

Now, let's get after it.



# 1. What problems do you solve?

If you've gone through the trouble of downloading this guide, there's probably a compelling reason you're looking to sign up for drill program intelligence software, or switching out another type of software. Sounds like you have a business problem that you are ready to solve!

Over the years, we have spoken to hundreds of mining professionals about the problems they encounter in running their businesses. We have found that whilst every exploration project is different, the problems faced are surprisingly similar.

**Here are some  
of the common  
problems we  
hear about:**

- no single source of truth for data
- fractured communication between the field and office
- data handling, sharing and version control
- data insights stuck on paper
- manual invoice reconciliation

Do any of these problems resonate with your team?

Buying software is kind of like hiring a driller. You need to hire a contractor with the right rig for the job. An aircore rig is a great tool, but if you only want to drill holes a kilometre deep, you'd want to have eyes on a diamond rig.

Similarly, every software platform exists to solve a problem, but does the platform you're looking at solve **your** problem?

Going into a demo knowing the specific problems you need to solve ensures that your team stay focused on your goals and avoid being side-tracked by the temptation of flashy features or price points.

*Write down the problems you need to solve here:*



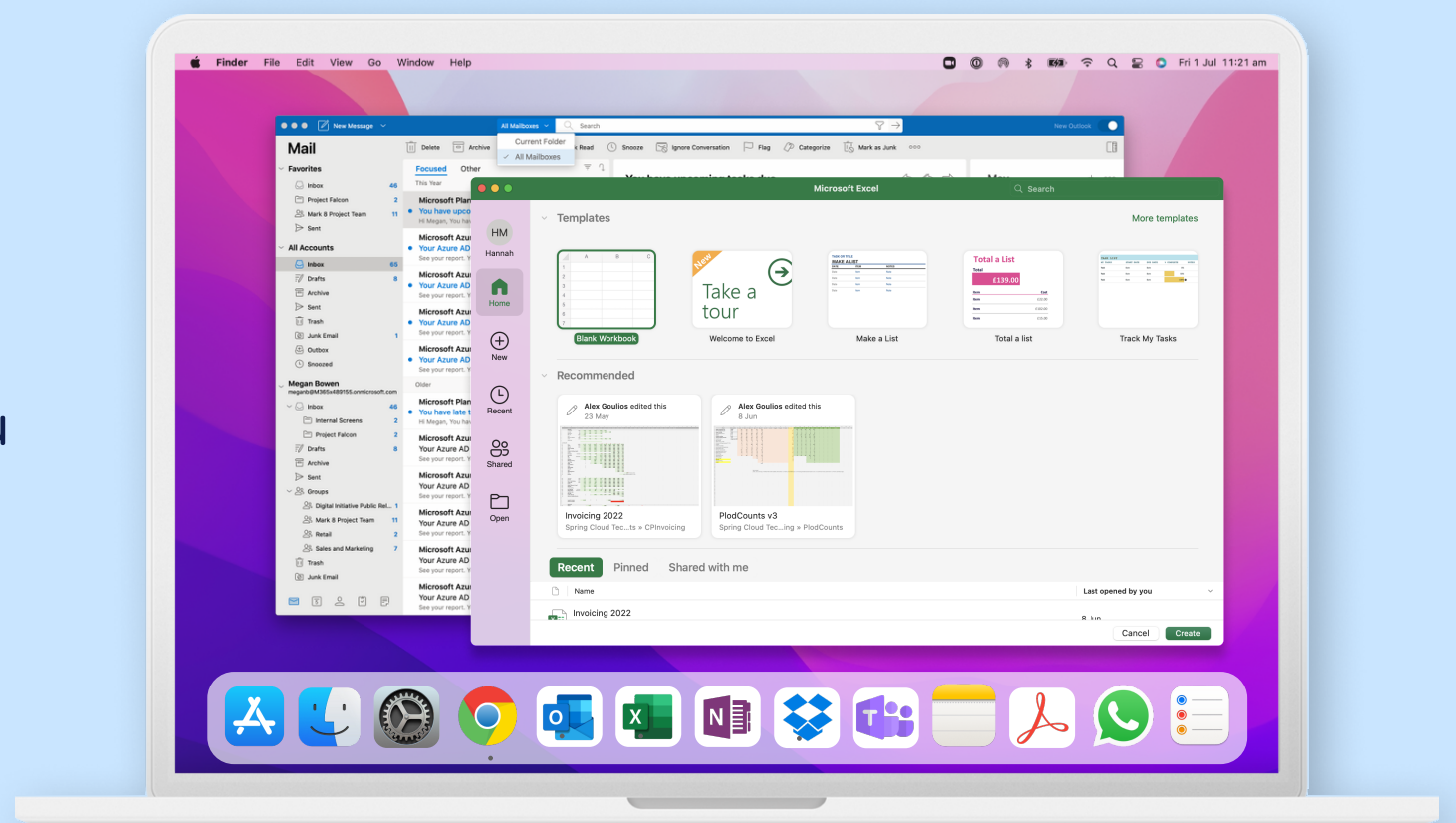
## 2. Is it an open system?

As an Exploration Manager, you're probably using a range of products to help you plan a drill program and complete resource estimation and modelling.

A common workflow we hear about is one platform to plan your holes, another for building geological models, an additional SQL database for your operational data, hundreds of spreadsheets and physical maps between these, and an accounting package.

Enter the need for an open system.

An open system is a software package that allows you to easily export all of your data so you can plug it into your other software. This saves you a lot of time and energy manually transferring huge volumes of data between systems, but it also adds value to each of these systems by giving a more complete picture of the drill program.



On an open system, data can be exported in a .csv format or even have the option to use an API or webhook to share data with other systems.

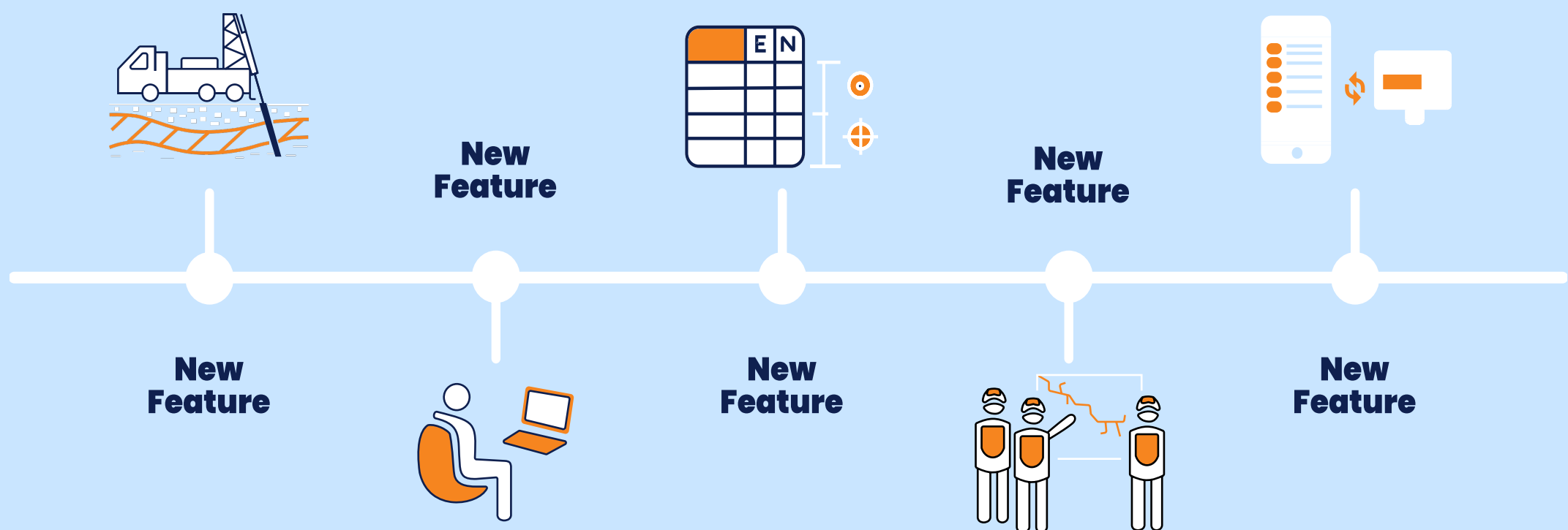
Now, this seems like a no-brainer, but we've heard of Exploration Managers getting stuck in software contracts that make it incredibly difficult for them to get ahold of their own data - or worse, they've even had to pay to export it from the system.

So, before signing on the dotted line - make sure you will have complete control over your data. This will help you get the most out of your data and ensure that you'll be able to use it across all of your other software packages.

### 3. What's on your product roadmap?

Software as a Service (SaaS) tools like Zoom, Microsoft Word and Xero have been around for years, but SaaS is comparatively new to mining. Modern mining SaaS platforms offer users a host of great features, but they are still developing and expanding on their offerings as they mature in the market.

Each option is focused on a slightly different set of problems faced by mining businesses. Unfortunately, this means compromise - at least for now. This is why it's important to ask about the product roadmap to find out which can solve your most pressing problems now and grow with you into the future.



Remember, SaaS is different to traditional or custom software. Whilst you may be able to submit feature requests, these often need to be prioritised in terms of the net benefit to all customers. Understanding your needs now and in the future compared to the product offering will help you determine which is most aligned with your specific needs - and avoid disappointment down the line.



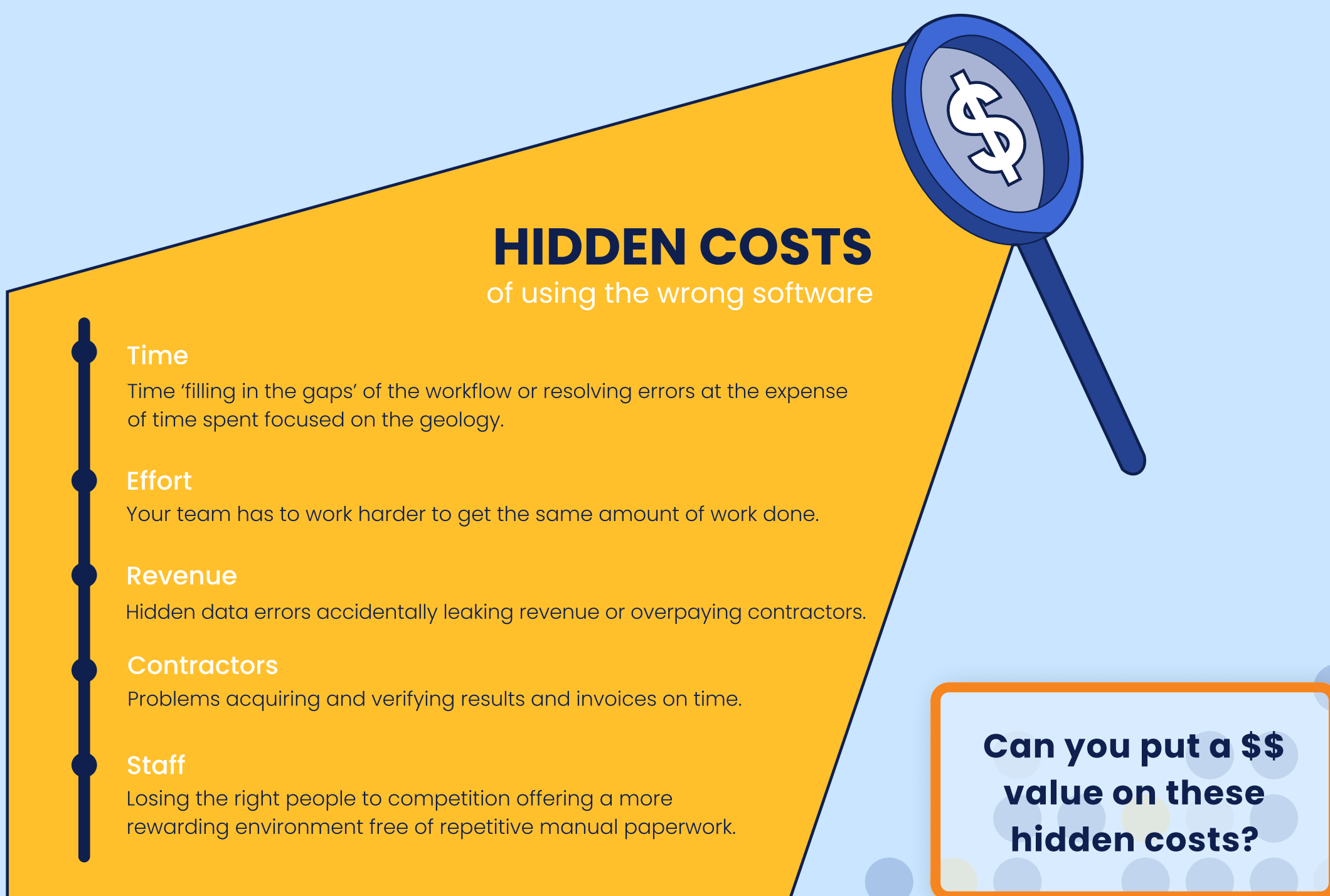
## 4. How much does it cost and are there any additional fees or charges that are not included in the subscription price/quote?

Do you have an idea of how much you expect to pay going into a demo?

One of the biggest frustrations that Exploration Managers share with us in their search for new software is how difficult it can be to see exactly how much the platform costs. This is why we list our pricing front and centre on our website.

Unfortunately, it is common for software developers to only offer custom pricing, hence the lack of transparency that frustrates their potential customers. This may be a sign of an underdeveloped pricing model, so proceed with caution.

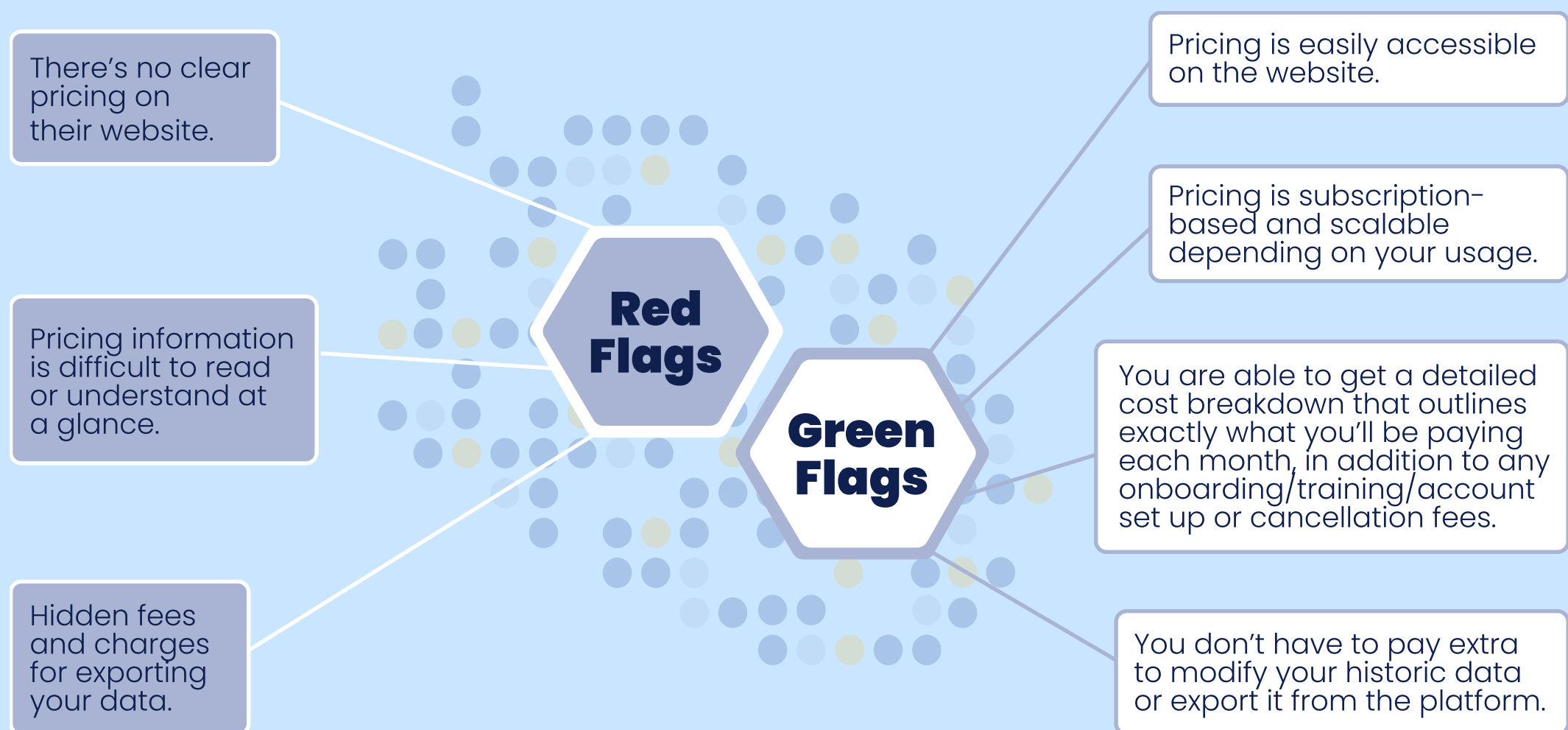
Price is important, but we recommend that you consider more than the out-of-pocket cost.





Choosing new software (or staying with the status quo) involves an opportunity cost. Do the savings on price outweigh the hidden costs of using the wrong software or not making a change?

So what should you look out for when investigating the price of a mining software solution?



## 5. What safeguards are in place to protect our data?

Cloud-based technologies are relatively new to mining, so many Exploration Managers aren't sure what questions to ask or what standards to expect when keeping their data secure while using a SaaS product.

Below are a few important considerations worth understanding that should cover your bases with a reputable SaaS provider\*, without having to have a degree in IT.

Let's divide these into two high-level categories: account-level and platform-level security considerations.



## Account-level security

Account-level security refers to safeguards that protect your data within your organisation's account. These safeguards prevent your data from internal accidents, such as:

- Your data being accidentally shared with another organisation that is signed up to the platform.
- Sensitive data being accessed by employees without that level of permission.
- Data backups in case of employee error (eg deleting a plot by mistake).

When it comes to account-level security, you'll want to hear that the provider has built the appropriate checks into their system architecture to ensure that your data is only accessible to your organisation.

If you are an exploration company with more than a few employees, a user delegation system that allows you control over the data that individual employees can view can help ensure that sensitive data is protected internally. This means that every user has an individual login that's password protected. Only your delegated account administrator can control your team's level of access.

Finally, regular data backups can help protect your organisation from user error. You should be able to openly discuss the frequency of these backups with the provider and decide if the frequency meets your level of comfort.

## Platform-level security

Platform-level security measures protect the entire product and its users from security issues like hacking.

A reputable provider will be open and willing to explain the safeguards in place to secure your data.

Here are two bonus questions that can help you gain an understanding of the security systems in place:

- **What certifications do you have and what standards do you follow?**

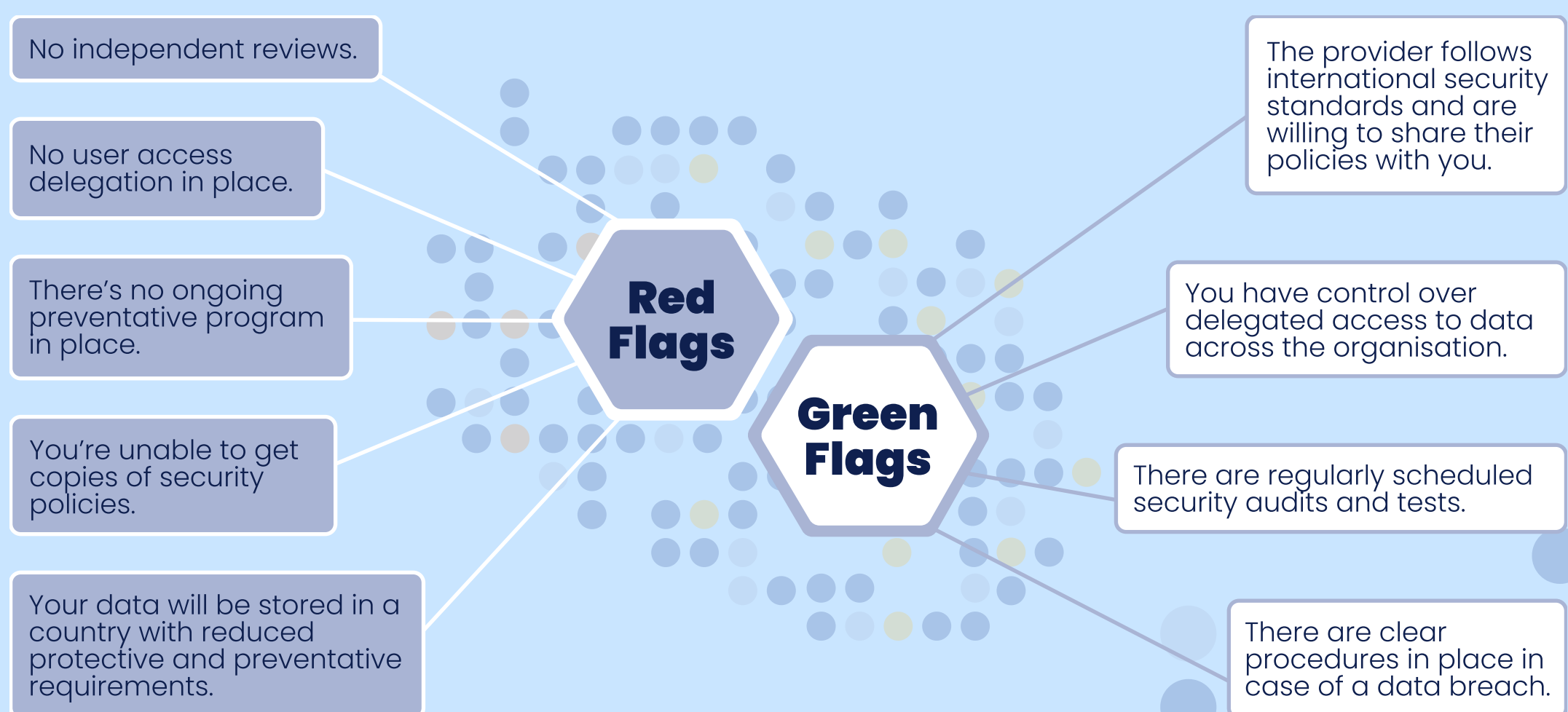
There are international standards that guide best practices in the tech industry. The relevant standards and measures in place, plus any certifications achieved, should be made clear in their security policies. Ask for a copy and flag anything you don't understand.

- **Where will our data be stored?**

The location of your provider matters, but so does the location of its servers. Not all countries have the same regulations when it comes to collecting and storing data.

For example, a software provider might be based in Australia, but its servers are in Indonesia. This means that your data would then be subject to Indonesian law, where the protections required aren't as tightly regulated and enforced as they are in Australia.

Make sure the SaaS provider will store your data according to the standards you would expect in your country.





*\*Unsure if your SaaS provider is reputable? Independent reviews submitted by verified customers can be a great place to start. We recommend looking at third-party review sites like G2, social media, or Google reviews. Testimonials and case studies on a SaaS provider's website can also give you insight into the success others have had using the platform. Finally, the provider may be able to provide the contact details of a few existing customers that may be happy to share their experience with the platform with you.*

## 6. What service and support will we receive and what happens if we have a problem?

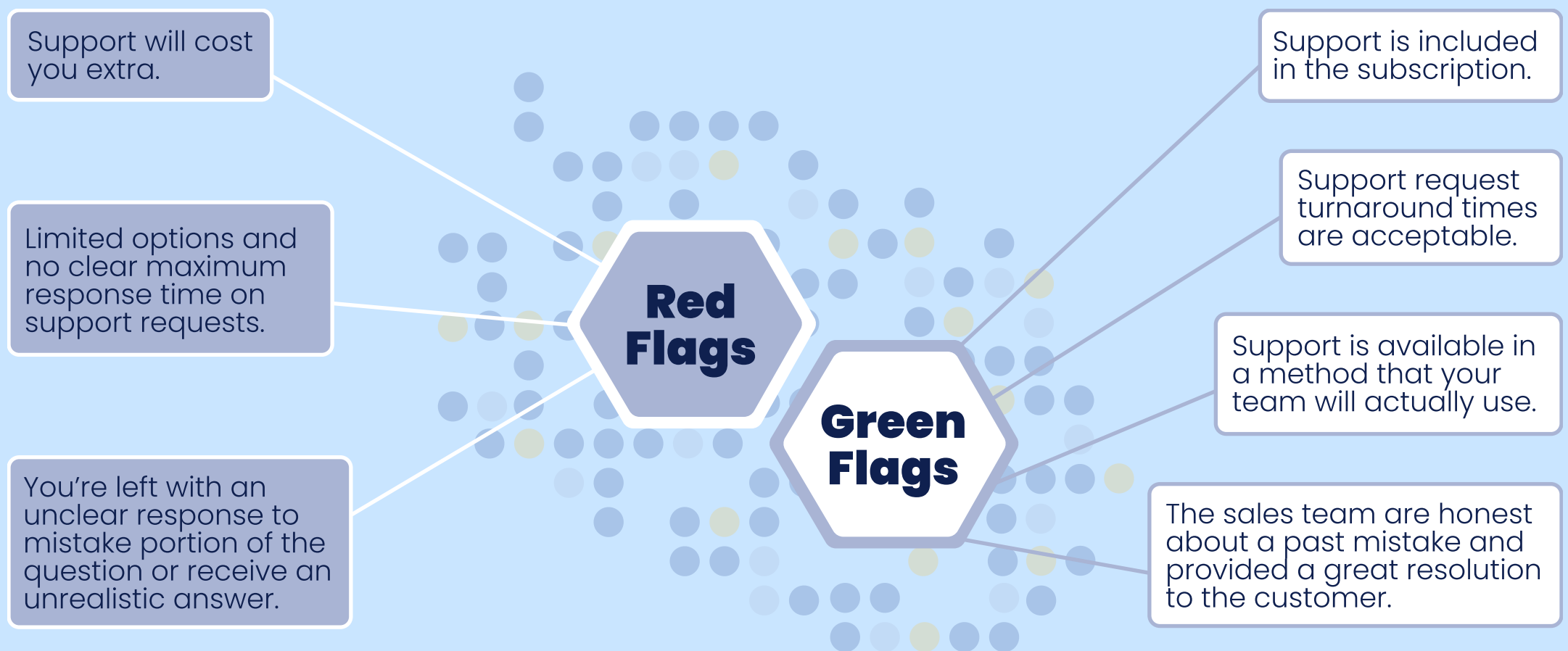
Did you know that some mining software companies don't include customer support in their monthly subscription pricing? The level of support and service options may also be scaled up or down depending on the level of subscription you purchase.

Common support options include email, phone call or ticket support systems, but now many SaaS subscriptions also include access to a self-service knowledge hub so your staff don't have to make contact for minor support queries. Self-serve options can be particularly useful if you're working in a different time zone to your software provider.

Thanks to modern customer service technology, it's possible to live chat with a support team just like you'd talk to a friend over text or Facebook Messenger.

Did you know that CorePlan is the only mining SaaS provider that offers live, in-app chat support? Simply click the chat bubble and instantly connect with our Perth-based customer success team.

Having access to support is important, but what's more important is actually getting your issue resolved. Mistakes are an unfortunate part of life, but the response to a mistake can tell you a lot about a person - or a software provider!



## 7. Who are your closest competitors and why should we choose you over them?

Thanks to Google, Exploration Managers can now research software online anytime they like. If you're reading this guide, you might have already looked at a few yourself.

If you can find this information, it's reasonable to expect that the software provider can too. Moreover, you'd probably also expect that they can clearly explain how they are different and why you should choose them, right?

An honest, confident answer to this question will indicate how they perceive themselves in the market and indicate whether they'll be the right choice for you.



## Why choose CorePlan?

We know what you might be thinking: Okay, let's skip to the chase then - what makes CorePlan different?

Glad you asked!

CorePlan is a new type of exploration software that removes manual paperwork from your drill program operations workflow so you can get back to the geology sooner.

We refer to it as 'drill program intelligence software', because it's a single source of truth where your entire team goes to work to run a drill program and see what's happening on the ground. It's as close as it gets to being on the rig!

Once you've decided where to drill and pushed your holes into CorePlan, the platform handles everything from pre-drilling activities to plod approval, sampling, cost reporting, rehabilitation and more.

Forget using paper, spreadsheets and a complicated filing system - all of your drilling data is in one place on CorePlan, making it really easy for your team to see the status of every hole and know what needs to be done next.



CorePlan brings Exploration Managers and their drill contractors closer together by making it easier to share data and collaborate from a single workspace. No more email chains or plod-version10.csv files to keep track of! All you need to do is import your plods into CorePlan after each shift and it'll run the numbers against your cost contract so you can track your costs in just a few minutes.

All of the data is pushed into visual charts and reports so that it's easy to identify anomalies and follow up with the driller before it gets on to your final bill.

Monitor and report on your drilling costs and production progress from the web portal in just a few minutes a day. If you're managing multiple projects, the global dashboard makes it easy to see your entire position in real-time and compare projects and performance across all your teams.

Let's face it: nothing beats seeing the product for yourself. So, let's make this official! Book a free demo on Zoom or MS Teams at a time that suits you on [our website](https://www.coreplan.io/exploration).

 *for more information go to*  
**coreplan.io/exploration**

