



# 7 QUESTIONS

## TO ASK YOUR DRILLING SAAS PROVIDER

*before committing to a deal.*

## About

Welcome!

Whether you're choosing drilling software for the first time or weighing up the benefits of changing providers, selecting a drilling software provider is a big decision. But, what questions should you be asking - particularly if you've never used a drilling operations platform before?

If you're ready to cut to the chase and find out exactly what to ask ahead of your upcoming drilling Software as a Service (SaaS) demo or sales call, you're in the right place.

This guide was designed so that you can relate each question back to the specifics of your business, that way you are able to cut through marketing fluff and extract personalised answers that are relevant to the problems you need to solve.

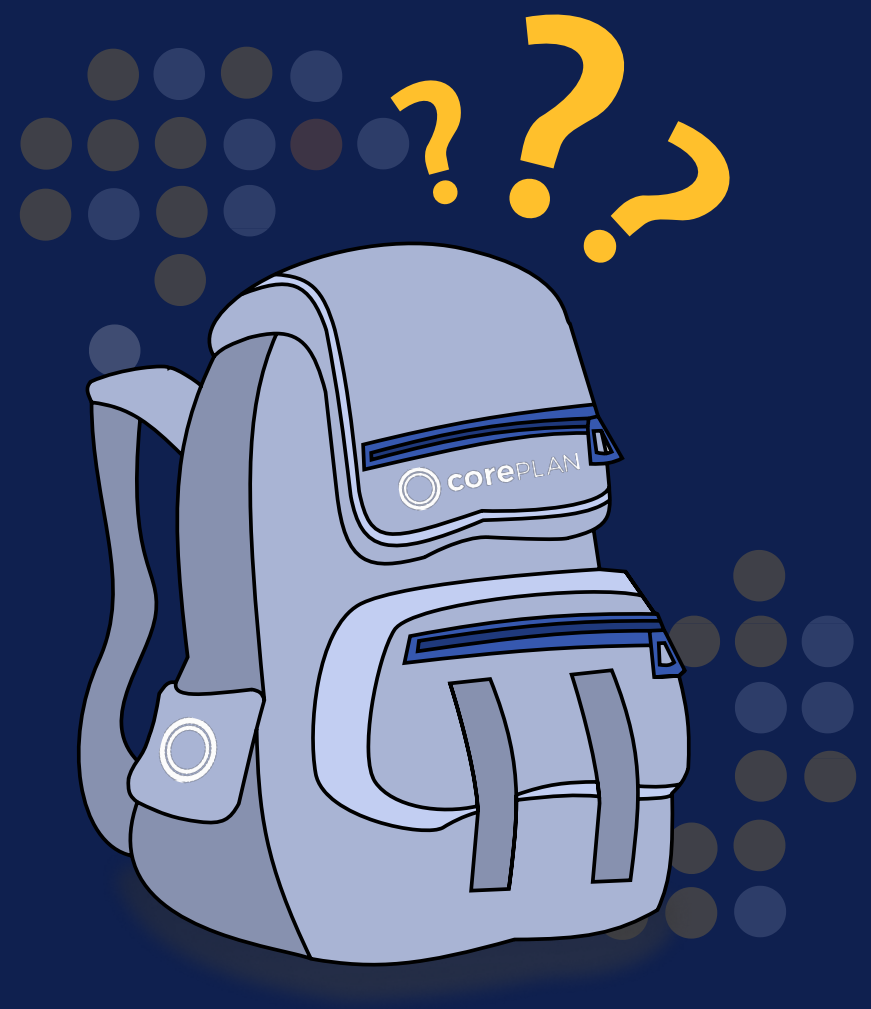
Take it with you to your next product demo meeting so you can walk away with the key information you need to be able to make a more informed decision.

## Why listen to us anyway?

We know what you're thinking: 'you're a drilling SaaS company, why should I listen to you? You're just going to give us the questions you want us to ask and 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 drilling professionals. We quickly realised that not that many drilling professionals have used SaaS in the workplace, with the exception of 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 to have 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 it's with us or a competitor, knowing exactly what you're looking for, so that when you see it, you know it's right for you.

As part of our own product development process, we are always on the hunt for new SaaS products to try; and this has meant we've sat through a lot of demos in our time. 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 to the trouble of downloading this guide, there's probably a compelling reason you're looking into signing up for drilling software or switching from your current provider. Sounds like you have a business problem that you are ready to solve!

Over the years, we have spoken to hundreds of drilling professionals about the problems they encounter in running their businesses. We have found that whilst every drilling business 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 & the 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 buying a rig. You need to have the right rig for the job. An aircore rig is a great tool, but if your clients only want to drill holes a kilometre deep, you'd want to have eyes on a diamond rig.

Similarly, every drilling software 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:*

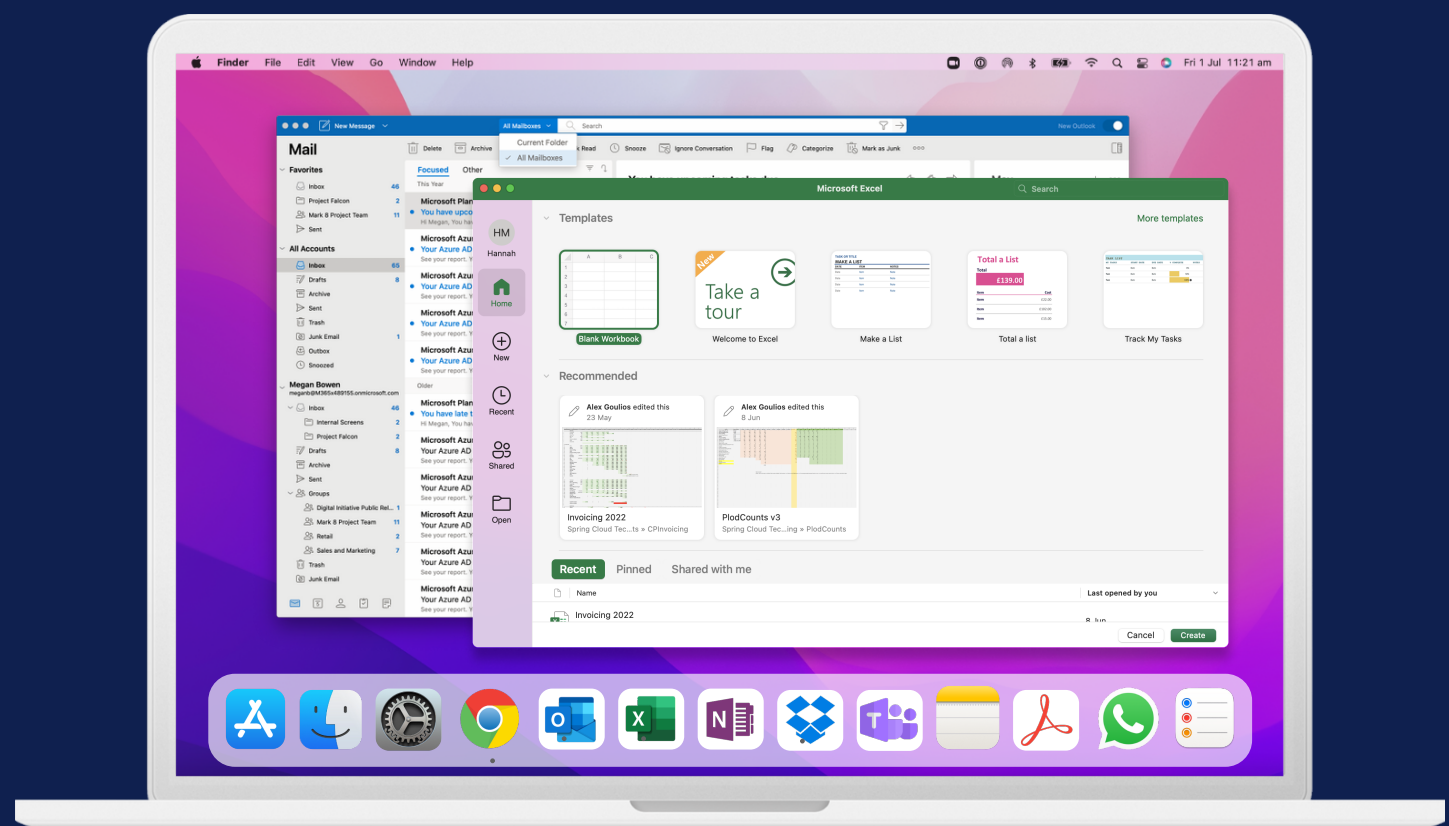


## 2. Is it designed specifically for drilling, and if so, what types?

Did you know that some drillers are using software that isn't actually designed for drilling?

Yes, it's true (and yes, it does break our hearts a little every time). Some drillers are using software that was originally built for another purpose, like mining project management or construction, for example. Often these platforms advertise to drillers and list drilling as a 'use case', but it's a retrofitted solution based on the workflow of another industry.

You can absolutely use these platforms to get the job done, however, for example, you may be able to capture data at the rig using a digital form, but you'll need to run alternate systems to handle invoicing, data analysis, people management etc.



You can read more about this [here](#) if you're interested in taking a deeper dive into this topic.

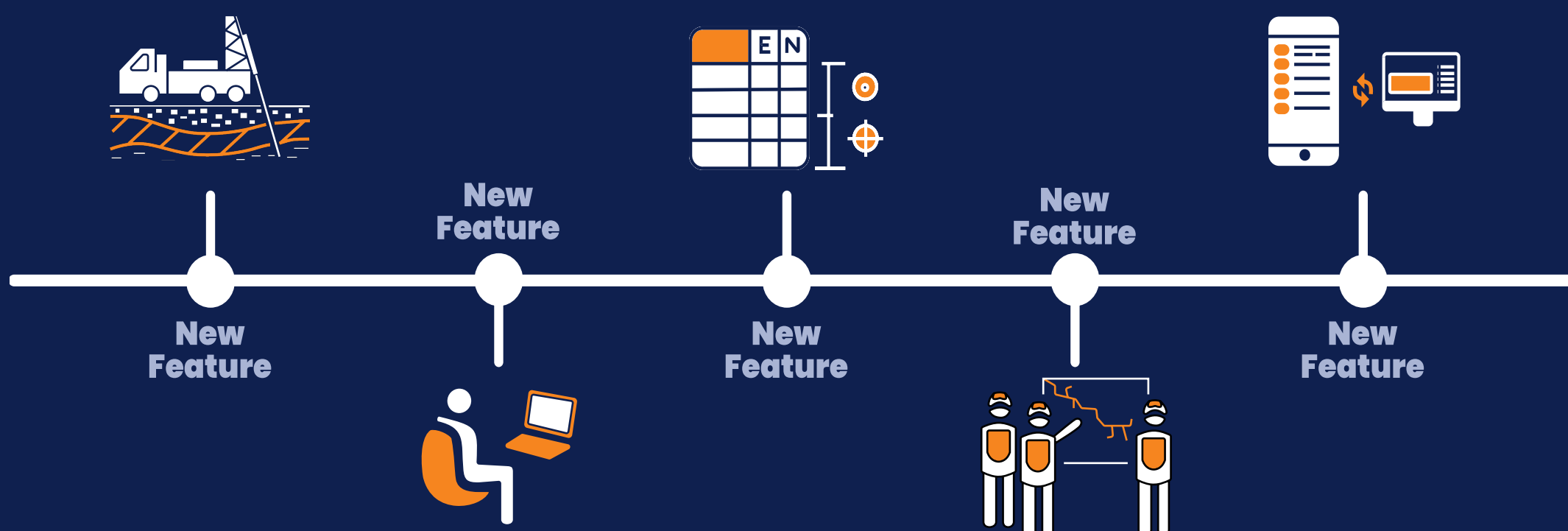
Further, not all drilling software is compatible with all types of drilling. For example, CorePlan was primarily built for mineral exploration drilling. However, it is also compatible with geotech and some other types of drilling but not oil and gas.

So, what are the signs that you might be on to a winner?



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

SaaS tools like Zoom, Microsoft Word and Xero have been around for years, but drilling-specific SaaS is comparatively new. Today's drilling 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.



At least right now, there's no provider that offers every single feature a driller might want (we're trying we promise!). Each option is focused on a slightly different set of problems faced by drillers. 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 that of the product, will help you to 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 drillers share with us their search for new software is how difficult it can be to see exactly how much they can expect to pay for it. 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 is so frustrating for customers. This may be a sign of an underdeveloped pricing model, so proceed with caution.

Price is important, but we recommend considering more than just the out-of-pocket cost.

Choosing any 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?



Choosing any 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 drilling software solution?



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

Because cloud-based technologies are relatively new to drilling, many drillers aren't sure what questions to ask or what standards to expect when it comes to keeping their data secure when 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 put in place to 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 plod 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 be able to ensure that your data is only accessible to your organisation.

If you are a driller 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 their own 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 are the measures in place that protect the entire product and all customers 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 practice in the tech industry. The relevant standards and measures in place, plus any certifications achieved, should be made clear in their security policies. Make sure to 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 actually located 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 reviews or Google reviews to start with. Testimonials and case studies on a SaaS providers' 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 drilling software companies don't include customer support in their monthly subscription pricing? Further, the type of support options and the level of service 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 drilling 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 drilling in a different time zone to your software provider.

Thanks to modern customer service technology, it's also 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 drilling SaaS provider that offers live, in-app chat support? Simply click the chat bubble and you'll be instantly connected 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 SaaS provider!

Treat your demo a little bit like a job interview (let's face it, it kind of is!) and ask the software company about a time that they made a mistake and what they did to resolve it.



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

Thanks to Google, drillers can now research software online anytime they like. If you're reading this blog, 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 give you an indication as to whether they'll be the right choice for you.

Want to find out more about the options available on the market? Check out our comprehensive article on the [best drilling software companies here!](#)



## Why choose CorePlan?

We know what you might be thinking at this point *'Okay, okay, let's skip to the chase then - what makes CorePlan different?'*

Glad you asked!

CorePlan is a single source of truth platform where your entire team goes to work to drill holes, fill plods and bill clients. It was designed in partnership with drillers like you to cut through the unnecessary complication of clunky old-school software and provide a simple but powerful data management solution for the modern driller.

Here's a few of the reasons why our clients have chosen us over our competitors:

- **CorePlan helps you take total control of your business**

It's easy to create, edit and run your own projects from the ground up using CorePlan. The platform was designed to take unnecessary complexity out of operations management so that you can spend more time doing what you do best: drilling.

Simply enter your contract details, import your client's drill program, select your equipment, assign personnel and start drilling!

Drillers submit their plod data using the mobile app (works on and offline), which is pushed into the office web portal for approval in real time (where reception is available). The best part? All costs and charges are automatically configured for invoicing, including any special contract clauses, so you can save hours of data entry every month. Overwrite a line item or modify data in bulk at any time with just a few clicks and have the changes instantly applied to your proformas. When you're ready, import your proformas directly into your accounting package for fuss-free invoicing.

Ready to start drilling more profitable metres? View your progress and gain insight into your performance at the project or organisation level using the dashboard reports or export your data to plug and play with third party apps. No fees, charges or restrictions on how you use your own data.

- **Designed for collaboration**

CorePlan brings explorers and drillers closer together by making it easier to share data and collaborate together in a single workspace. No more email chains or plod-version10.csv files to keep track of!

Monitor plod progress from the web portal and view the approval chain status, so data gets to the client on time, every time.

Speaking of clients - invite them to their very own CorePlan portal and you'll be updated in real time when they accept and approve your plods. Alternatively, export your data as a PDF or .CSV file and share as you wish. Once it's approved, all accounts need to do is export the pre-configured proforma into your accounting package and you're ready to be paid.

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 [here](#).



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

