

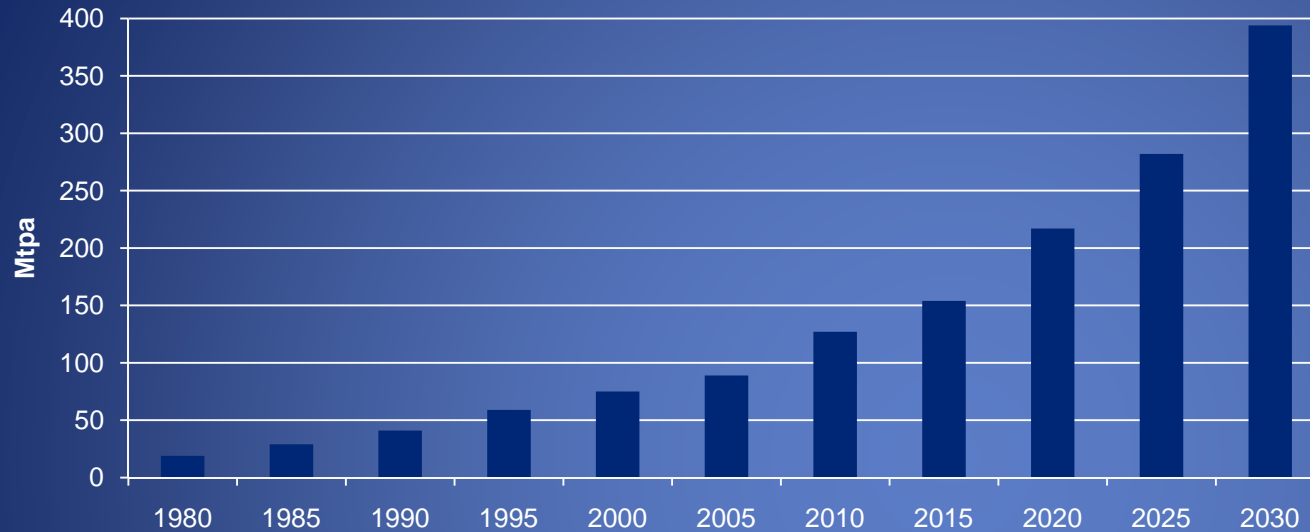


# Getting the mix right

*Michael Lynn, Partner, Deloitte*

# The oil and gas sector is undergoing substantial transformation

Asia Pacific LNG Demand

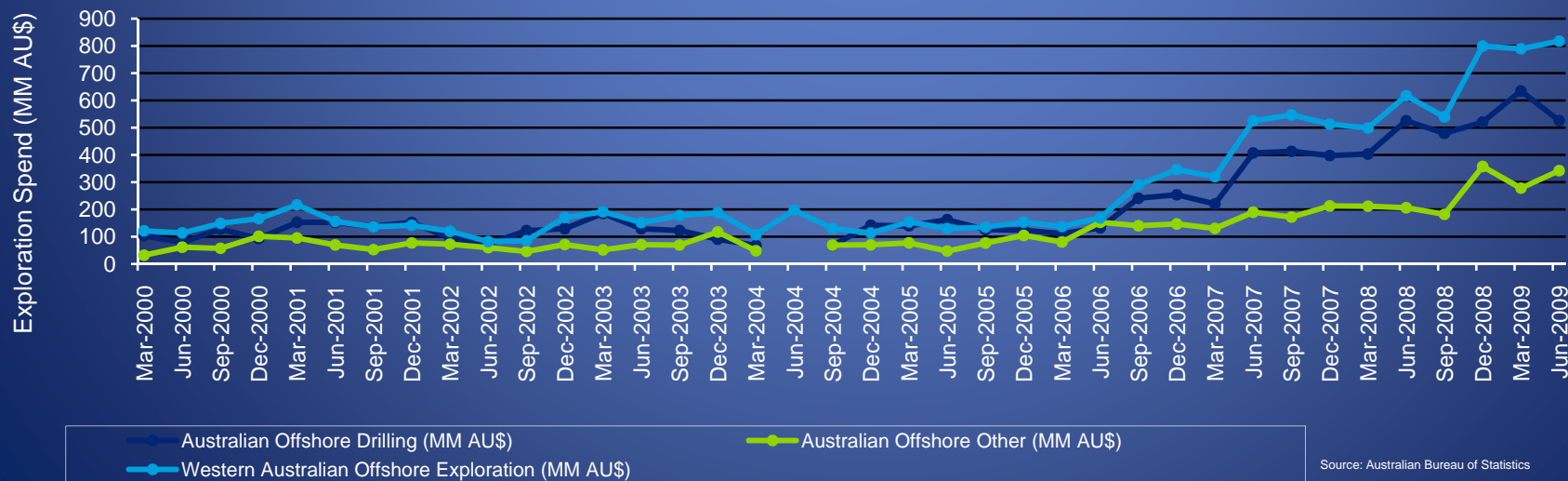


Source: International Energy Consultants

## Key Questions:

- What is our business?
- How are we differentiated?
- How will we grow?

Offshore Quarterly Exploration Spend



Source: Australian Bureau of Statistics

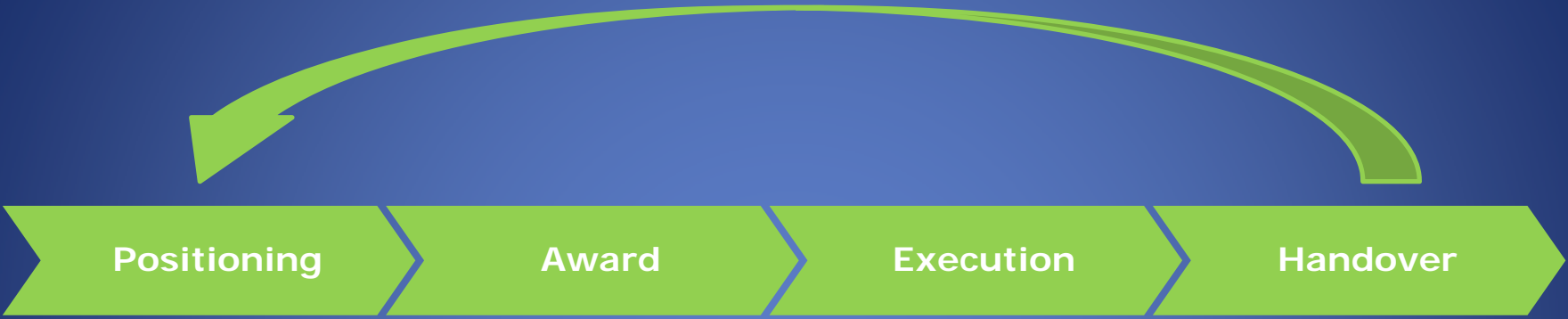
# Service organisations best positioned to transform with the sector will take a disproportionate share of the pie

## Key challenges

- Ability to listen and respond
- Create reputation for delivery
- Management of risk
- Maintain connectivity and communication
- Manage information
- Engage human capital
- Embrace agility and 'capacity to act'



# Understanding the Customer's needs at each stage of the contracting cycle is critical



- Connectivity
- Listening

- Manage Risk
- Information

- Manage Risk
- Connectivity
- Information
- Engage Human Capital

- Create Reputation
- Engage Human Capital

← Embrace Agility and Capacity to Act →

In a complex and dynamic environment,  
remember the following:

- Listen to your customers and respond accordingly
- Manage your risks transparently and collaboratively
- Embrace agility and enhance your customer's capacity to act

