Ready, Set, Implement

How to Successfully Deploy an EHS&S Software System

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As business requirements, EHS&S processes, and technology tools continue to evolve, software systems need frequent modifications and updates to keep up with all the changes. In fact, based on NAEM's research, it's not unusual to be back in the market for additional functionality or a replacement within five years of purchasing a software system.

Depending on the scope of the project, you'll probably spend 18 months defining your requirements, selecting a system, integrating your tool and training end users before your project concludes.

Given these sizeable investments of time and resources, you want to ensure they are well-spent. That's why NAEM has compiled this guide, which is based upon in-depth interviews with EHS&S professionals and implementation partners, who have decades of experience deploying systems on a global scale.

While emphasizing that every implementation plays out in a unique way, our experts agree that most implementations have a core set of activities in common. We've distilled their observations, recommendations, and "lessons learned" into six steps that will help you start—and stay—on the right track as you introduce an EHS&S application that can deliver tangible benefits to your organization.

Sincerely,

Carol Singer Neuvelt
Executive Director, NAEM

About NAEM

The National Association for Environmental Management (NAEM) empowers corporate leaders to advance environmental stewardship, create safe and healthy workplaces and promote global sustainability. As the leading business community for EHS and sustainability decision-makers, we provide engaging forums, a curated network, peer benchmarking, research insights and tools for solving today's corporate EHS and sustainability management challenges. Visit NAEM online at naem.org.

Table of Contents

Introduction

Perhaps your company's existing EHS&S software system—which was state-of-the-art when the IT department developed it 10 years ago—can't keep up with burgeoning operational demands. Maybe vendor upgrades are no longer available for the system your company purchased seven years ago. Or maybe a fine or violation has underscored the company's need for faster and more comprehensive record-keeping and reporting.

Whatever the driving force is behind a new software system or upgrade, the implementation phase is the road that takes you from a concept of what you'd like and want, to a fully functioning system or application. How, when and with whom you travel that implementation road will greatly influence the system's level of acceptance and usage throughout your company. An implementation counts as a success only when the software product's full value is understood, embraced and ultimately utilized.

Viewed from a high level, implementation encompasses the activities and outputs associated with delivering a business process. Closer to home, at the EHS level, it focuses on the nuts-and-bolts work that will change how people collect and use data in support of decision-making, reporting and overall efficiency. Although every implementation, even within the same company, will be different, the organizational outcome—not the hours worked, the number of people involved, or the money spent—will always define success.

As those who specialize in this area will tell you, there are countless stories of companies who spend significant resources—time, man hours and budget—implementing systems which the users ultimately reject. The six steps described in the pages that follow can help prevent something similar from happening on your watch.

63% of Responding Company's EHS Function Provide the Initial Purchase Budget

*Results based on 95 of the responses to NAEM's 2017 EHS&S Software Buyer's Guide Survey

Six Steps for Implementation Success

Step 1: Evaluate and Strategize
Begin with a clear, focused project plan.

Step 2: Refine the Requirements
Take another look at - and tweak - business processes and priorities.

Step 3: Optimize the Design
As with any architecture project, the design and construction flow from the specifications.

Step 4: Put it to the Test
Make sure the system performs as expected.

Step 5: Introduce the Solution
Just-in-time training prepares users for what's ahead.

Step 6: Sell the Value of the Change
Continually share information throughout the organization as implementation proceeds.

Step 1: Evaluate and Strategize

Begin with a clear, focused project plan.

Approval of the purchase order for a new system or application triggers the implementation phase. Its first step involves basic project planning— working backward from the desired outcome to figure out the who, what, how, and when needed to accomplish the goal.

Assess the Internal Resources Required and Available

Back when many EHS&S software systems were developed and hosted internally, IT personnel generally took the lead in managing the implementation process. While IT experts remain key members of the implementation team, research conducted for NAEM's 2017 EHS & Sustainability Software Buyer's Guide confirms that the EHS&S function leads the project at the majority of companies.

Evaluate and Strategize

As David Williams, a pharmacy industry leader, observed, "IT people are not domain experts in the area of environment health and sustainability. They are not members of the EHS&S organization, living there every day and understanding the cultural dynamics, politics, and functions of the organization."

While the EHS&S function will likely take the lead, the full size of the implementation team will vary widely, depending on the project's scope and complexity and how long the team's members can dedicate 20 percent, 50 percent, or 100 percent of their time to the implementation. Many companies form a core team, as Allergan PLC did for a recent implementation, then draw in other stakeholders at selected points along the way.

"The core team was two people from our corporate EHS&S team and two key people on the vendor side," explained Allergan's Sulaiman Hamidi, who served as project manager for an implementation that replaced an existing EHS data management system used by 20,000 people globally. Because Allergan hosts its data externally, IT resources were not part of the core team. "But," Hamidi added, "there were points during the process when we engaged them. And, on and off, we engaged some of our EHS&S site-level folks."

Median Initial Software Budget

$100,000
Comprehensive System

$37,500
Issue Specific System

*Results based on 25 and 12, respectively, of the responses to NAEM's 2017 EHS&S Software Buyer's Guide Survey

Evaluate and Strategize

In addition to vendor representatives and possibly an implementation partner, key players include:

A project manager: This internal role—which carries the authority to identify, corral, and use internal resources—can be filled by an EHS&S professional, an IT professional, or someone from the project management organization. Each will probably have expertise in one area, but have limited knowledge of other areas, underscoring the need to build a balanced core team. Beyond having solid organizational skills, the project manager must bring the right mindset. For instance, Golder's JR VanOrder suggested project managers should be "more pragmatic than dogmatic about following their own methodology—they should be open to best practices from their implementation partners and selected software vendor."

An executive sponsor: Support from the executive suite or business leadership, wherever budgets are finalized, helps smooth out or remove obstacles that arise during implementation. "The best sponsors are really well-connected within the organization and have the ability to talk to other stakeholders across the company," said Melissa Koob of TetraTech. "They're really like an internal salesperson, somebody who can keep up momentum and excitement and come to the defense of a project when the goal line has to move or the budget needs to be amended."

A variety of stakeholders: Involving mid-level managers, end-users and other key groups in configuring or testing the software can yield a better product as well as stronger acceptance. When engaged early enough in the implementation process, they can provide valuable feedback on gaps to fill or corrections to make.

Evaluate and Strategize

Should You Hire an Implementation Partner?

About half of the EHS&S professionals surveyed for NAEM's 2017 EHS & Sustainability Software Buyer's Guide planned to use external consulting services in support of software selection or implementation. Of those, more than half intended to have the consultant assist with both selection and implementation.

"A company can do the implementation using its internal IT department, it can have the vendor configure the application, or use an implementation partner model. All are viable and have their own pros and cons," said Sameer Vyas of Huco Consulting. Another option: take a hybrid approach. For example, an outside consultant might provide assist at certain junctures--such as business process analysis or deployment support-- with the company and vendor dividing the remaining responsibilities.

David Williams suggested basing the decision on "whether your company has the expertise, knowledge, and resources to get the work done—and done right." A consultant can contribute objectivity and a richness of experience from working with many other customers, not to mention another pair of hands to take on tasks. Those may not be needed, however, for implementation of a system upgrade or individual module. Having done implementations both with and without an implementation partner, Williams observed, "either one can work just fine, if the project is managed, resourced, and budgeted properly."

In general, consider retaining the services of an implementation partner when you:

- Anticipate a large, complex implementation that would tax internal resources for an extended period of time.
- Lack a lot of experience working with the software vendor selected.
- Would like an outsider's objective view of internal processes and how to address specific issues.
- Want to learn more about the best practices associated with a particular software platform.
- Are undertaking an environmentally complicated implementation—such as one related to greenhouse gases—and don't have the subject matter expertise internally.

Evaluate and Strategize

50% Plan to Use a Consultant

● Yes   ● No   ● Unsure
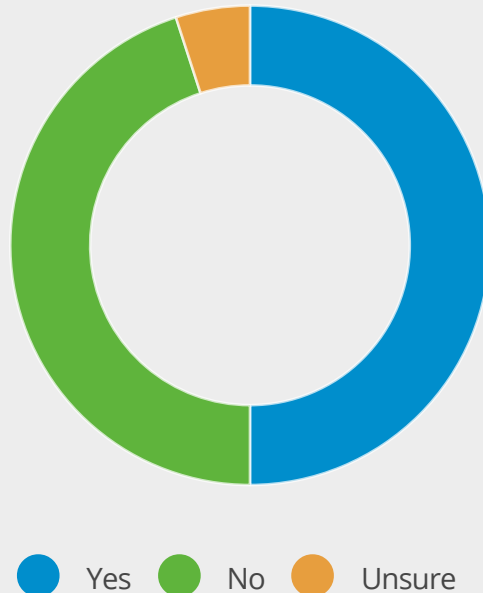
*Results based on 38 of the responses to NAEM's 2017 EHS&S Software Buyer's Guide Survey

Determine the Ideal Timeline

In general, consultants said, count on a system implementation taking about 12 months. Upgrades and implementation of smaller modules can probably be accomplished within four to eight months, while large, complex systems could potentially need more than 12 months.

If your project is particularly complicated, you might want to consider a multi-stage deployment to demonstrate early results, while dividing the project into smaller phases that are less likely to strain financial, implementation and IT resources. "Focusing on one module, securing incremental success, and then building on those successes has less risk for many customers," said JR VanOrder of Golder. "You can start to use a system and receive its benefits while you begin work on the next module. You don't have to wait until the end of the project to deploy everything at once."

Evaluate and Strategize

Either working backward from a selected go-live date or planning forward based on anticipated activities works well, depending on company preferences and priorities. Company leaders, for example, may want deployment to coincide with a traditionally slow time or wish to fast-track deployment to better manage a changing regulatory environment.

Typically, the vendor develops the initial timeline based on the project's requirements, number of modules and deployment sites, and resources available to both the vendor and its customer. Then the project manager and subject matter experts may weigh in on whether the timeline appears uncharacteristically slow or unrealistically fast. Skewing in either direction can lead to company-wide confusion, lack of interest in the project, and trigger budgetary issues.

The timeline should include a schedule for meetings between the implementation team and the vendor's representatives, to discuss strategies, share concerns, and update progress. Ideally, the meetings should take place weekly, either via telephone conference, Skype, or in person.

How Your Implementation Approach Can Affect Your Timeline

The way an implementation unfolds can follow one of two models: waterfall or agile. A waterfall implementation—the traditional approach—follows a tightly planned series of steps: After system requirements have been agreed upon, the system's design is developed; after the design is approved, configuration begins, and so on. Just like a waterfall, the project cascades down through the steps as planned.

On the plus side, a waterfall implementation is process-oriented, typically includes many timelines and milestones to mark progress, and results in a fully finished product. It works especially well when the system requirements are well-understood and not likely to change and in corporate cultures that favor a schedule-driven approach. On the down side, implementation activities are separated from one another; missed deadlines at stages along the way can greatly impact the roll-out date.

Evaluate and Strategize

In Williams' experience, "With a traditionally planned project, when people are handed a plan and given tasks, the ownership of the work isn't very high. They basically execute tasks, without much or any input into the timeline." He is a proponent of agile implementation, which uses lean techniques focused on working efficiently and effectively. While the implementation steps remain the same, they are done in a less structured manner than the waterfall methodology.

"An agile implementation model involves an iterative process that allows users to see incremental results earlier in the project than if the whole system is implemented at once," explained Koob. "You get to the same end result, but you break it down into manageable pieces." Because they are working toward a shared outcome, rather than individualized tasks and activities, people tend to collaborate more on agile implementations and have more ownership of the final product.

The fast and adapt-as-you-go pace of an agile implementation, however, can be difficult to accept, particularly if the corporate culture is not attuned to agile techniques. In addition, the methodology's built-in flexibility can encourage never-ending changes and scope creep.

Functions Involved with Selection and Implementation

93%
EHS involved with both selection and implementation

73%
IT involved with both selection and implementation

16%
IT involved with only implementation

3%
EHS involved with only selection

*Results based on 37 of the responses to NAEM's 2017 EHS&S Software Buyer's Guide Survey

Evaluate and Strategize

Craft a Communication Strategy

The project leader's responsibilities should include the development of an organizational change management plan. For larger projects in particular, applying the psychology of change to implementation activities may require the assistance of an implementation partner or an internal communications function.

Elements of the plan should ensure the people affected by the implementation can:

- Understand what the implementation aims to accomplish.
- Know the value the new software or system will deliver.
- Have the opportunity to provide feedback on how well the new software meets their needs.

"Nothing ever works right the first time. There will be bumps and bruises throughout the implementation process, and you'll encounter some surprises. So have a team you can trust and a process for handling things you didn't expect."

JR VanOrder
Golder

Step 2: Refine the Requirements

Take another look at—and tweak—business processes and priorities.

Both business processes and requirements should be revisited and refined during implementation.

Mapping workflows and identifying requirements for a system are integral components of the software selection process. But six months or more could have passed since their initial development, and organizational needs may have changed during that time.

Say your company plans to implement an incident management system and, through workflow mapping, discovers that all business units follow a slightly different process for managing incidents. Simply imposing one solution on all the business units will not resolve the differences or engender acceptance of the new system; instead, the business units should collaboratively agree to use the same process before proceeding with implementation. Otherwise, feuding factions may develop, and their ongoing disagreements could delay or even derail implementation.

Refine the Requirements

"A clear and concise implementation plan should be reviewed and updated, as needed, to ensure stakeholders stay aligned during implementation," emphasized Melissa Koob of Tetra Tech.

Agree on Priorities

To figure out where and which part of a system to deploy first, focus on the primary pain point—the most critical business need or pressing issue. "What's your key objective?" asked Huco Consulting's Sameer Vyas. "If it's to improve environmental reporting, then start with air quality. If it's to ensure compliance because of a consent decree that requires you to have a system in place, then start with a compliance calendar. Or, if you're trying to reduce your injury and incident rates, start with safety modules, such as observations, inspections, action plans, and incident tracking."

Above all, added Vyas, resist the temptation to introduce numerous modules all at once, even if you've already purchased them. Trying to implement air quality, incident reporting, environmental auditing, and risk management all under the same go-live date, for example, can lead to costly configuration errors as well as utter confusion among users. Addressing the most critical need first enables you to learn best practices and understand how the implementation team works best. Perhaps most important, it clearly demonstrates the new software's value and therefore establishes credibility with the user base.

Additional priorities can then be addressed through a phased deployment, either by modules, regions, or business units. "Many times, with a bigger implementation, the pain point for one business unit will be different from another's," JR VanOrder of Golder observed. "You can start by deploying something that addresses one business unit's critical need, then roll out the completed module to the others as needed, where that need isn't as much of a concern."

Refine the Requirements

Top Business Objectives for EHS&S Software

Improve ability to analyze data

Centralize data collection

Improve compliance assurance

Collect data for reporting

Improve accountability

*Results based on NAEM's 2017 EHS&S Software Buyer's Guide Survey

Decide How to Handle Historic Data

What will your company do with all the information resident on its now-outdated EHS management system or soon-to-be-retired legacy system? Initially, the desire may be to move all of it to the new system. Doing that, however, may not prove necessary if a review of organizational requirements reveals little use for archival data. One option is to de-normalize the data and extract it to a flat file before retiring the old system.

Regulatory or business reporting requirements may call for retention of documentation or comparative data for a specified number of years. In those cases, a plan for moving the desired data to the new system is needed.

Refine the Requirements

"The migration is an exercise in cross-referencing and mapping, because what one system calls an Employee ID another system may call an Employee Number. You may consider developing a vocabulary list for the project to help with migration discussions," explained Koob.

At Allergan, Sulaiman Hamidi was somewhat surprised that importing and integrating two years of archival data required the longest lead time when the company implemented a system from a new vendor. "The lesson learned from that is to really understand your data," Hamidi said. "When we were mapping fields from the old system to the new, we found many things weren't matching because we'd eliminated some fields and added others. That took some time to manage."

"Avoid the risk of not identifying priorities—or making everything an equal priority. Sometimes, through discussions, a high need-to-have requirement becomes a lower, like-to-have requirement."

Sameer Vyas
Huco Consulting

Step 3: Optimize the Design

As with any architecture project, the design and construction flow from the specifications.

Once refined and finalized, the system's requirements must be translated into the software environment. This happens through configuration—deciding which features to turn on or off, or revise—to ensure the software performs as desired.

Guard Against 'Over-design'

At this point in the implementation process, when the concept of a new, improved system becomes more concrete, EHS&S professionals may need a reality check. Otherwise, there's a risk of over-designing—loading too much functionality or too many features into one platform.

Optimize the Design

"Most EHS professionals are overworked and, with so much to do, want one tool that removes the administrative burden of their work. There is a tendency to recreate tasks in a selected platform exactly as people perform them. This can lead to a lot of system customizations and a system that feels too complex to use," said Melissa Koob of Tetra Tech.

Instead, use the implementation process as a time to reflect on whether everything in the specifications is truly necessary. As an example, Sameer Vyas of Huco Consulting pointed to a large, global firm that, over the course of 20 years, had developed 38 Key Performance Indicators (KPIs). Managers simply couldn't track so many indicators, so the firm undertook a Six Sigma process that eventually trimmed the number of KPIs measured to just seven.

Top Desired Capabilities of Buyers

Incident reporting
Environmental auditing/inspections
Corrective action tracking
Incident tracking
Incident investigation
Performance metrics/dashboards/scorecards

*Results based on NAEM's 2017 EHS&S Software Buyer's Guide Survey

Determine the Extent of Configuration

Continuing innovations in EHS&S software have led to built-in functionality that, just a few years ago, would have been available only in a highly configured solution.

"Most vendors have a much better understanding of EHS&S needs today versus when I did my first implementation 15 years ago," reported Sulaiman Hamidi of Allergan PLC. "The leading players all have products with enough breadth to meet most EHS&S needs of an organization."

Optimize the Design

In fact, EHS&S professionals and implementation partners agreed that the data management systems now available can probably meet 80 to 85 percent of most companies' needs right out of the box.

"You definitely want to leverage the functionality that's available in the base product, through the base configurations, to keep costs down," said Golder's JR VanOrder. Typically, the base configurations enable you to add, delete, or rename information fields; adjust workflows; set up reports; revise drop-down menus; and add logos and other visual elements. More complex configurations, such as custom workflows or specialized data forms, are easily accomplished but will require more effort to complete.

Customizations, on the other hand, are coding changes to the software that affect how the system fundamentally works; implementation partners do not recommend customizations.

"With customization, you might not be able to upgrade to the next version of the software or modules. It leads to higher costs and more risk of failure than necessary," noted VanOrder. "We've worked with companies stuck on a highly customized solution and two or three versions behind on the software. The effort to unwind the customizations was larger than reimplementing the modules or selecting a new platform. They couldn't do anything more so they chose a new platform."

"The change in vendors and systems challenged us to look at how we've done things before and see if there are ways to improve our processes and increase efficiency. For example, it forced us to question what we were really doing with all the data points being collected. Were we collecting information just to collect it? If so, did it make sense to have that data point?"

Sulaiman Hamidi
Allergan PLC

Step 4: Put it to the Test

Make sure the system performs as expected.

Before being introduced to an entire business unit or company, the new system needs to be tested, tweaked, and tried out with select users to ensure it delivers all it promises.

Even right out of the box, no software will work perfectly for any company. Before being introduced to an entire business unit or company, the new system needs to be tested, tweaked, and tried out with select users to ensure it delivers all it promises.

"The design period is still conceptual and things come together during configuration, but you probably don't see the whole software until testing, in a traditional waterfall approach" explained David Williams. "Testing is when you finally see your business process from beginning to end and maybe realize, 'Oh, that's not really what we meant.'"

He adds that using an agile approach can help you understand how closely the software solution matches the business intent by seeing working functionality early.

Put it to the Test

Testing by a small group helps ensure the software is correctly configured to business processes and addresses the most pressing priority. "You have only one chance to make that first impression, so get enough end users to find all the critical gaps in the software before rolling it out to everyone," recommended JR VanOrder of Golder. "The project team may have missed some requirements or may have been modeling for one set of end users who do things a little differently. Incrementally bringing in additional end-users as you progress with the project can uncover that."

Several times, Rick Comrie of Cooper Standard Automotive has heard a software vendor say, "Yes, we can do that," in response to a functionality request. But being able to do something doesn't necessarily mean the software already does it—or does it well. That realization led Comrie and his team to take scripts developed for vendor demonstrations and revise them into detailed scenarios for testing a just-delivered product before go-live.

Before Cooper Standard Automotive implemented its chemical compliance management system, for example, Comrie and another subject matter expert spent hours working through the test scripts that aligned to their business process, regardless of software, and enacting all the scenarios they needed the system to address. "Step by step, we go through each scenario to see what we're stopped by. For example, the page might have the capability of uploading a document, but when you try to upload, nothing happens," said Comrie. "As soon as we come up against a brick wall, we write a ticket into the vendor's system and then move on to the next step. We catch a lot in testing."

The more highly configured the software, the longer the length of the initial test phase. In general, noted implementation partners, testing can range from several days to about four weeks. With large implementations, companies often incorporate feedback from the first round of testing and then release the revised software to a different group of users for additional testing.

Put it to the Test

For example, VanOrder said, one multi-national company first released a new product to a business unit for testing. "We gathered feedback, identified lots of gaps, made changes to the configuration, and did the whole thing again. They wanted to get the solution right, to fit the rest of the organization and minimize disruption to the business," he recalled. "The first time, we found lots of things no one from the business had thought of. In the second round, we had probably half as many end-user issues, and after that the issues dropped off significantly." Over the course of two-and-a-half months, working with progressively larger groups of users, the company tested and rolled out the product worldwide to thousands of users with high levels of adoption and positive end-user feedback.

Put it to the Test

Do a Trial Run

To boost user acceptance and adoption rates, particularly for a large implementation, consider adding time to the schedule for a pilot roll-out to one or two sites. This enables a small group to use the software every day in a live environment—more than just testing the software, they actually experience how it works.

Before worldwide roll-out of its new system, Allergan selected two locations to start collecting environmental health and safety metrics, one of the four modules being implemented. "We selected the two sites that would use the system the most and also had EHS leaders who are influencers within the organization," said Sulaiman Hamidi. "We knew if we got engagement and acceptance from those two sites, then the rest of the team would support the new process."

The two pilot sites used the module for one month, providing feedback through emails and face-to-face meetings. "We received really good input on ways to improve the process. Then, after making the changes, we rolled out the metrics piece to the rest of the organization," Hamidi added. "That helped everyone get comfortable with the system, the interface, and the log-in, which made it easier to expand to the other modules."

"You really have to 'test drive' the product, but with a logical, step-by-step approach like you'd actually use. We had two subject matter experts write the test scripts, so we're really able to put the system through its paces."

Rick Comrie
Cooper Standard Automotive

Step 5: Introduce the Solution

Just-in-time training prepares users for what's ahead.

No matter how efficient and effective a new product or system may be, it's still new to the people who must use it monthly, weekly, or even daily. To take full advantage of the product, users need ample opportunities to become familiar with its functionalities, interfaces, and ultimate benefits. Training creates self-sufficiency for users.

Deciding when to provide that training is really a question of balance. On one hand, users need enough time to become comfortable with how their tasks or workflow will change and to achieve basic mastery of the technical aspects. On the other hand, users will lose their interest and excitement—and may forget much of what they learned—if trained too far in advance of roll-out.

Generally speaking, training should take place between one week and four weeks before the application goes live.

Introduce the Solution

Articulate the Training Philosophy

Before beginning to craft a curriculum, materials, and schedule, it's helpful to confirm the underlying premise of the training.

Is it, for instance, to ensure all users have all the materials and knowledge they need to succeed on the first day of deployment? To give all users the basic information needed to begin using the system, then offer more in-depth information about the system's capabilities as their comfort level increases? Or to provide a select group of users with detailed training that they share, as needed, with other users? Often, a company's philosophy encompasses all these and more options, depending on the scope of implementation and the size of the user base.

Most firms employ a train-the-trainer approach: They initially train a core group of key users who, in turn, bring their own experiences to the training they provide to others. "You can usually identify your super-users once you start to communicate the progress on your system implementations. Super-users tend to be more savvy with technology and are usually from the EHS staff, so they understand what training is needed and why," noted Tetra Tech's Melissa Koob.

Although it still uses one-on-one or instructor-led group trainings, Williams says his company now places more emphasis on self-paced, individualized learning. "Our approach is that 80 percent of what an individual needs to learn in order to execute a business process and use the system can be done in a self-directed way," explained David Williams. "Using our learning management system as the platform, we assign training modules to people, can track whether or when the modules have been completed, and can include competency testing if necessary."

Introduce the Solution

Employ a Variety of Training Methods

Because end-users have different learning styles, offering training in numerous ways will increase the odds of the new system being accepted and utilized to its full potential.

At Allergan, for example, Sulaiman Hamidi started with several WebX sessions to train the EHS leads at each site on the new data management system. The live sessions were recorded and supplemented with video clips and PowerPoint slides so they could be accessed online at any time. EHS teams could draw on all those materials, plus any of their own creation, when training other users at the site level.

"We set up the trainings a couple of weeks prior to each of the four modules getting rolled out. Honestly, I de-emphasized the training piece, because the system was fairly intuitive to use. We've had more users come into the system because, much like online banking, it's efficient and fairly easy to use," said Hamidi.

Go Live with the New Software

After what may have seemed like a never-ending selection and implementation process, the time finally comes to put the new product into the live environment for all users. The release might be a "big bang," where all users gain access to the new software at the same time, or done in phases, with several go-live dates planned over months or years.

Teva Pharmaceuticals chose the wave approach for a worldwide deployment of a regulatory compliance system. As Williams explained it, "Every two months we deployed to a group of sites, with the deployments overlapping by one month. So while we were halfway through the implementation for one group of sites, we'd start the next implementation for another group."

Introduce the Solution

"A phased roll-out doesn't always mean doing modules in a series—you can do them in parallel, too," noted Huco Consulting's Sameer Vyas. For instance, a company might introduce the incident management module of its new system on the safety side of the business while rolling out the compliance module on its environmental side. A designated period of post-go-live support, also known as "hypercare," follows each deployment date. During that time—lasting 30, 60, or 90 days— additional training and one-on-one support is typically offered to users.
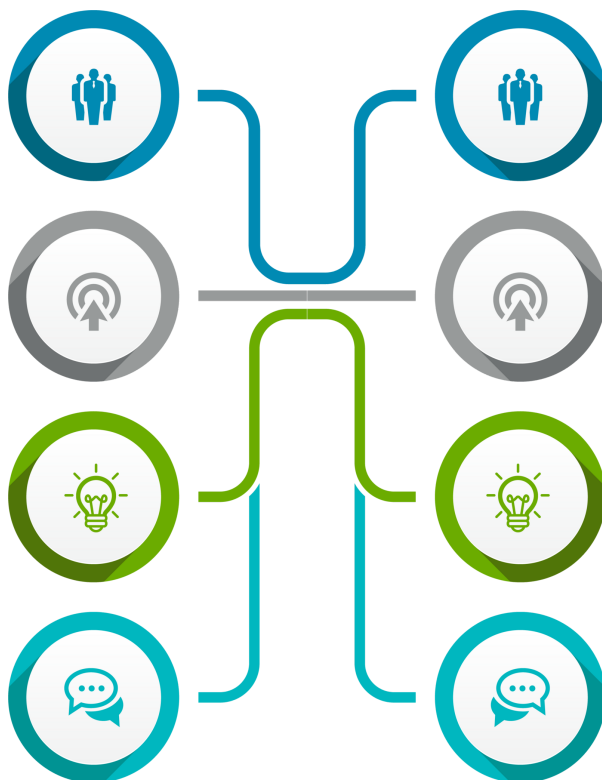
"Introducing an EMIS system into a well-established EHS program can be daunting. Rolling out portions of the system to a small group of stakeholders helps to build a system that fits company culture while creating groups of cheerleaders for the program as a whole."

Melissa Koob
TetraTech

Step 6: Sell the Value of Change

Continually share information throughout the organization as implementation proceeds.

When it comes to user engagement, the key is to communicate early, often and openly.

As the key lesson learned after more than two decades of software implementations, David Williams pointed to communications—specifically, the need to place emphasis and resources on telling others in the company that change is coming and what that change will mean.

"If people aren't ready, open to, or accepting of change, they will only use the system to the minimum to make sure they 'don't get in trouble,'" Williams observed. "Many times, they'll put data into an enterprise system but still have other shadow systems for managing the work and doing their own internal reporting."

Sell the Value of Change

Communications are not a panacea, but developing a holistic strategy can help create the culture change you seek. While most messages will originate from the implementation team, the lines of communication should criss-cross the entire organization, running vertically and horizontally and up as well as down.

Messages need to reach the leadership level, the management level, the program level, the EHS&S level, and the system's end users. Some companies appoint a change management champion for an implementation project, or ask the executive sponsor to fill that role. A change management champion is especially valuable when a significant cultural shift will occur, such as moving from Excel spreadsheets to a data management system.

Functions Involved with System Management

70%
EHS leads

59%
IT on the team

43%
Operations on the team

*Results based on 37 of the responses to NAEM's 2017 EHS&S Software Buyer's Guide Survey

Prepare People for Change

As soon as Cooper Standard Automotive issued RFQs for a Safety Data Sheet management system, Rick Comrie began letting EHS&S personnel know a change from manual record keeping was in the offing in the next year or so.

"We expect our three regional directors, during regular meetings with the country managers, to let them know this is going to happen. Then the country managers communicate with the plant-level HSE professionals, mostly through emails and

Sell the Value of Change

conference call and meets in person several times per year, offering more communication opportunities. Comrie added, "The implementation is always an agenda item, even if nothing is currently happening. So there are no surprises—everyone will know when the system will be coming."

Once implementation has begun, use emails, newsletters, blogs, and other postings to keep disseminating internal messages, such as:

- Estimated roll-out date(s)
- Screen shots showing the new system's look
- Progress reports (for example, "Development is 80% complete, so training will begin next month")
- How the new system will solve current "pain points"
- The feedback loop for reporting issues or concerns
- Success stories, such as interviews with end-users involved in the testing or pilot phases

Remember: The more you communicate, the more assured the end-users will feel when they start using the application.

"People typically don't like change, even if it will ultimately be good for them. They like the status quo," Williams observed. "It's in the best interest of the implementation team to help people navigate this period of change and ensure they come out on the other side embracing the change, seeing the value of it, and moving forward with the new way of working."

"

"Organizational change management needs to be considered with just about any type of implementation. Any change to a business process that changes the way people work, or their roles within a process, or how the software tool works should be addressed."

David Williams

Acknowledgments

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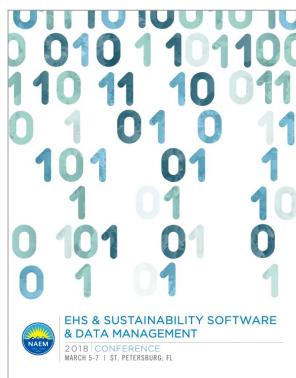
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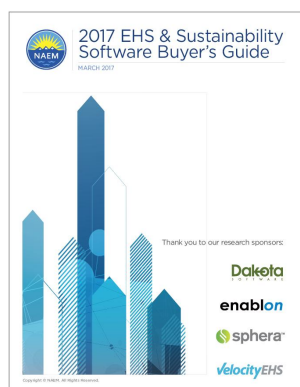

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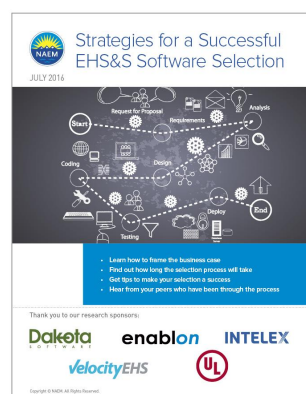
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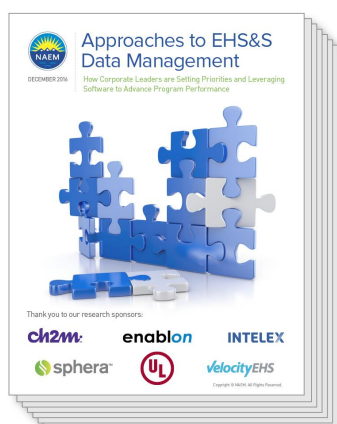
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