

Creating a Technology Road Map for EHS&S Excellence

November 5, 2020



Welcome to NAEM

A professional community where you can get the solutions you need to make an impact

Benchmark

Benchmark your programs via events, online learning, research and executive networks

Learn

Learn tools & techniques to execute your strategy and be inspired by peers

Build

Build a network of peers whose experience can help you solve your challenges

Delivering Knowledge & Professional Wisdom

Peer Forums



Research Insights



Targeted Networking



Actionable strategies to empower EHS&S leaders to make an impact



NAEM Connects EHS & Sustainability Leaders

120 Corporate Members

4,200 Individual Members

60
Affiliate Members

Reaching a community of Practice

25K+

Today's Speaker

Sameer Vyas
Partner
Huco Consulting Inc.







Building a Tech Roadmap for EHS&S Excellence



Sameer Vyas

- Please complete the MS Teams poll for benchmarking
- Download our strategy workbook





Align people



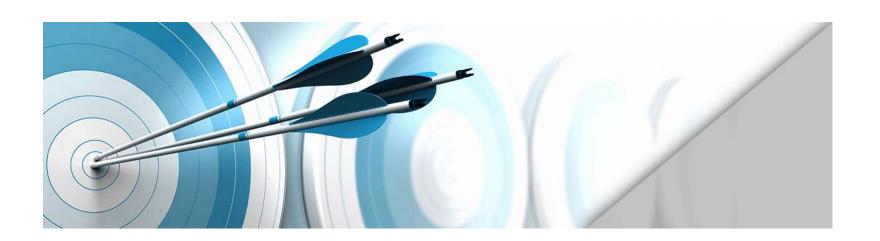
- Align on objectives, timeline and budget
- Create a project charter
- Incorporate all key stakeholders team effort



Align objectives with the right tactics

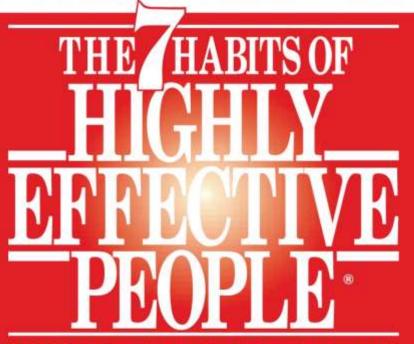


- Map how technology may work for and against your objectives
- Develop a roadmap that defines realistic tactics for clearly defined objectives





No. 1 International Bestseller



TAUGHT BY THE AUTHOR

Stephen R. Covey



Worst cases when not aligned with roadmap?



Disparate/siloed solutions

Nothing to show stakeholders

Need to reinvent the wheel

Objectives not met

Reputation is ruined (you and/or your dept)

Worst cases when not aligned with roadmap?



NOVs

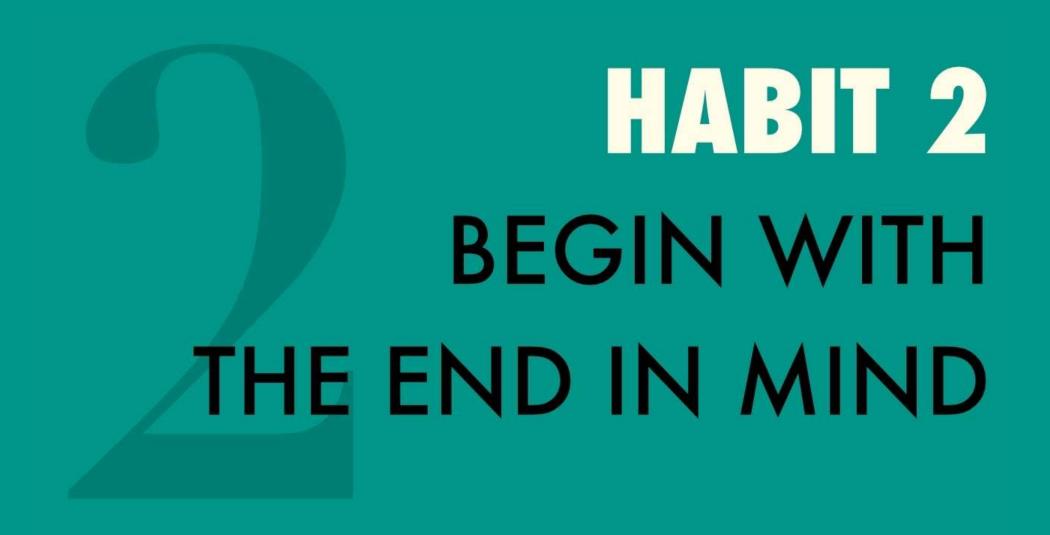
Failed audits

Pipeline ruptures

Spills

Wildfires

Casualties



Key End in Mind Questions



Who are your key stakeholders?

What is EHS&S success?

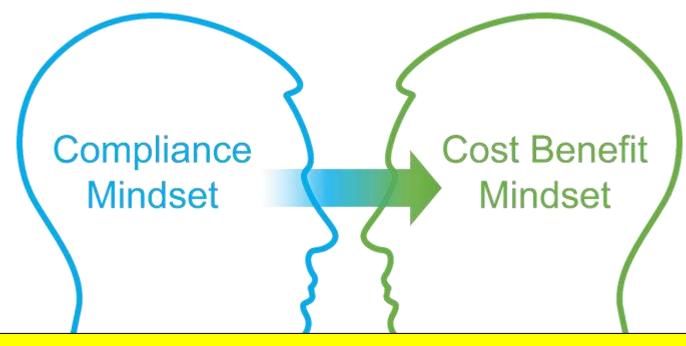
What matters to you?

Stakeholder Collection



Compliance, Environmental, Safety, Health, Sustainability IT **Operations** Risk Procurement Legal Security Customers Finance **Agencies Supply Chain** HR

Make the Business Case

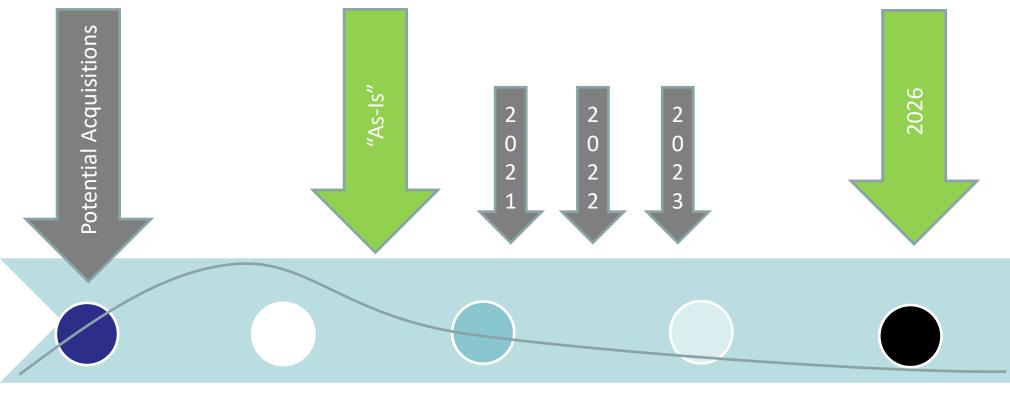


Tip: Tie your project mission to the company mission.

"94% of CEOs consider the core function of EHS to achieve compliance"
301 EHS decision makers in Verdantix's Global EH&S Leaders Survey 2016: Budgets and Priorities

Strive to lead





Working Toward Compliance

- Few written programs
- Little or no professional EHS management

Achieving Compliance

- Many EHS programs
- EHS professional management

Compliance + Basic Management Systems

- Internal audits
- Regular updates of EHS programs
- Team of EHS professionals

EHS Management System Driven

- Established management systems in place
- Safety culture optimized
- EHS and Sustainability tied to organization initiatives

EHS Leadership

- Sector leader
- Best in Class
- EHS and Sustainability tied to competitive advantage

Project Roadmap - Timeline



Estimated Timeline ¹	2018		2019			2020						
Recommendation Milestones	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
A1: Centralize Training Mgmt (Key objectives)												
A2: Centralize Training Mgmt (Automation/Enhancements)												
B1: Select EHS IS 3												
B2: Implement EHS IS 3												
B3: Setup Compliance Requirements 4												
B4: EHS IS Enhancements												
C1: Standardize Corp Hierarchy												
C2: Standardize Corp Hierarchy (Implement)												
D1: COMPANY Connect Doc Storage (Plan & Build)												
D2: COMPANY Connect Doc Storage (Migrate)												
E: Centralize Employee Performance												

Project Roadmap - Resources



	Passurass	Hours	range	\$ range ⁵			
Recommendation Milestones	Resources	Low	High	Low	High		
A1: Centralize Training Mgmt (Key objectives)	EHS, LMS Vendors, SuccessFactor (SF) Admin	176	520	\$ 24,640	\$ 72,800		
A2: Centralize Training Mgmt (Automation/Enhancements)	EHS, SF Admins	80	160	\$ 11,200	\$ 22,400		
B1: Select EHS IS 3	EHS, Selection Team, S/W Vendors	96	160	\$ 13,440	\$ 22,400		
B2: Implement EHS IS ³	EHS, IT, Implementation Team, S/W Vendor	608	1320	\$ 85,120	\$ 184,800		
B3: Setup Compliance Requirements 4	EHS, Ops, Consultants	800	3200	\$ 112,000	\$ 448,000		
B4: EHS IS Enhancements	EHS, Implementation Team	0	320	\$ -	\$ 44,800		
C1: Standardize Corp Hierarchy	IT, Sys Admins, EHS, Finance	96	340	\$ 13,440	\$ 47,600		
C2: Standardize Corp Hierarchy (Implement)	IT, Sys Admins	160	384	\$ 22,400	\$ 53,760		
D1: COMPANY Connect Doc Storage (Plan & Build)	EHS, SharePoint team	104	230	\$ 14,560	\$ 32,200		
D2: COMPANY Connect Doc Storage (Migrate)	EHS, Ops	120	480	\$ 16,800	\$ 67,200		
E: Centralize Employee Performance	Fleet Mgrs, SF Admins	240	544	\$ 33,600	\$ 76,160		
	TOTAL	2480	7658	\$ 347,200	\$1,072,120		

Project Charter



- Team effort
- Obtain a signed project charter
- Align on objectives, timeline and budget



Process Overview





What areas should be reviewed?



Safety

- Incidents
- Audits/Inspections
- BBS Observations
- Compliance Tasking
- JHS/JSA
- Risk Assessment/Mgmt.
- Learning Management
- Training Management
- Legal Registries
- VR Training
- Drones
- Exoskeletons

Environmental

- Greenhouse Gas
- Air
- Water
- Waste
- Safety Data Sheets
- Chemical Management

Health

- Occupational Health
- Ergonomics
- Industrial Hygiene

Misc.

- Sustainability
- Process Safety
- Management of Change
- Maintenance Mgmt.
- Contractor Mgmt.
- Supply Chain
- KPIs / Dashboarding
- Integrations
- Electronic Reporting
- Safety Data Sheets
- Business Intelligence
- Predictive/ Prescriptive Analytics

What are your priorities? Please enter in the chat.

Gather feedback through survey



- What do you like most about your current EHS&S processes?
- What do you like least about your current EHS&S processes?
- Please list 1-3 activities that you feel are the biggest pain points in your current EHS&S process.
- Are there any EHS&S activities that already have a streamlined process? If so, briefly discuss.
- Please priority rank the areas of focus for organization system improvement. Add any necessary descriptive comments or subject areas not covered (and its importance).
- For each area of focus, where is your organization today in terms of system maturity on a scale of 1-5 (matching the options in the "Strive to lead" slide?

Prioritize Areas of Focus



Priority	Subject Area	Comments
High	Injury & Illness	
High	Risk Assessment	
High	Audit & Inspections	
High	Emer Preparedness & Response	
Medium	Reg Compliance	
Medium	Occupational Health	Could be separate tool.
Medium/Low	Chemical Management	Replace SDS or integrate with.
Medium/Low	Hazardous Waste	
Low	Ergonomics	Nice-to-have

Existing Systems & Processes



Subject Area	Process, System, Tool	Deep Dive?
Incidents		
Audit		
Etc.		



Workshop planning



Identify players

(could include existing vendors!)

In-person vs. virtual

1-2 hours each

Share Agenda

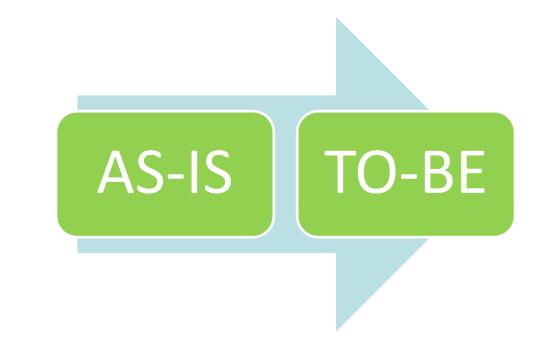
- Objectives
- Roles
- Planned approach
- Success factors
- Gap analysis (AS-IS vs. TO-BE)
- Requirements review & Q&A

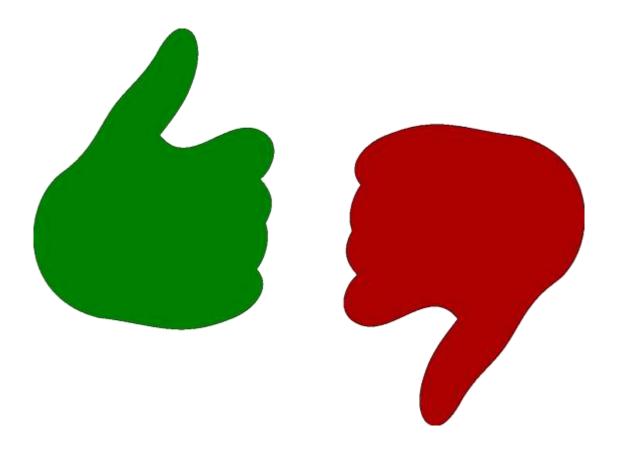
Gap Analysis



What is your #1 priority?

- Please enter in the chat.
- Think about it for next few slides.





Key AS-IS questions



- Demo existing system(s) & discuss existing processes
 - General process
 - Key goals & outputs
 - Pain points / areas for improvement
 - % needs met
- Existing systems & processes that can be leveraged (i.e. integrations, source data, etc.)?
- What are the most important functions of the system/process for you?
- What resources do you have to support this?

This should be a highly interactive & adaptive process with various questions/pathways

Key TO-BE questions



- What are the key/required objectives?
- What work processes do you want to automate?
- What are the key challenges identified you want to address?
- Who will benefit?
- Who will support & provide input?
- Will you self-implement or hire?

Documentation



Video and audio recordings of each web session.

Detailed notes. After each session, streamline & compile into single file.

Archive documents and presentations.

Submit any follow-up questions and update documentation with responses.

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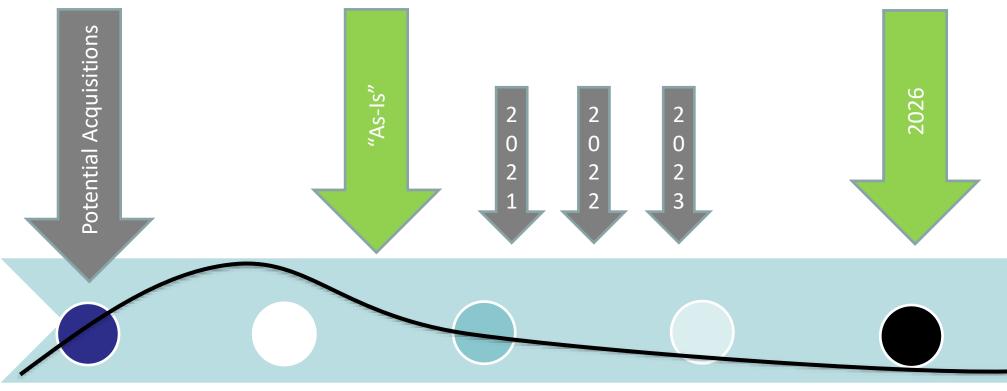
Workshop



Roadmap

Strive to lead





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How Do You Achieve Success?

Integration of business objectives, EHS, and operations for continuous improvement.

Critical component for long term success is ongoing management involvement.



Strategy & Planning

Implementation

Support

User adoption & big data

Regulatory content & review



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Lots of Opportunities to Learn & Connect



2021 Conference Dates





These dates are tentative as we consider the health & safety of our attendees, speakers and staff.

Robust reports to support your benchmarking

- The EHS&S Tech Transformation
- Why Companies Replace Their EHS&S Software Systems
- 2019 EHS & Sustainability Salary Report
- Strategies for Improving Contractor Safety Management
- Why Diversity and Inclusion is a Winning Strategy for EHS&S Teams
- Strategies to Increase Your Executive Presence
- Leading-Edge Greenhouse Gas Reduction Strategies
- Setting the Next Generation of Sustainability Goals
- Insights From Successful Supply Chain Sustainability
 Practices



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 - Facebook: <u>www.facebook.com/NAEM.org</u>
 - LinkedIn: https://www.linkedin.com/company/naem



Thank you for Attending!



A recording will be available in 3-4 days. You will receive an email once it's posted to our site.



Have a safe & healthy day!

