

Top 3 Strategies for a Successful EHS Software Implementation

Whitepaper

OVERVIEW

Implementing a modern EHS software system should be an efficient and low-risk process if one stays focused on three key strategies. First, the implementation of a **Standardized not Customized** solution is essential; highly customized solutions may initially seem enticing, however, they are overly complex and expensive to implement and sustain. A standardized solution can be implemented for half the time and budget, and future upgrades are no additional cost. Second, it is important to maintain a **Disciplined and Documented** implementation process with simple but thorough design; investing hours up front in the defining of requirements will avoid significant time loss and user frustration, later. Finally, a focus on **User Adoption** is critical, by rolling out a simplified, intuitive solution in stages by module. This will yield the highest user adoption rates, increasing connectivity and information visibility throughout the enterprise so management can proactively prevent unwanted events.

THE TOP 3 STRATEGIES FOR A SUCCESSFUL EHS SOFTWARE IMPLEMENTATION

1 | STANDARDIZED VS. CUSTOMIZED SOLUTIONS

Some vendors approach a software implementation with promises of creating a user interface *customized just for you*. This involves starting with a “blank slate” and customizing fields and workflows. However appealing it may sound on the surface, there are significant problems to consider with this approach:

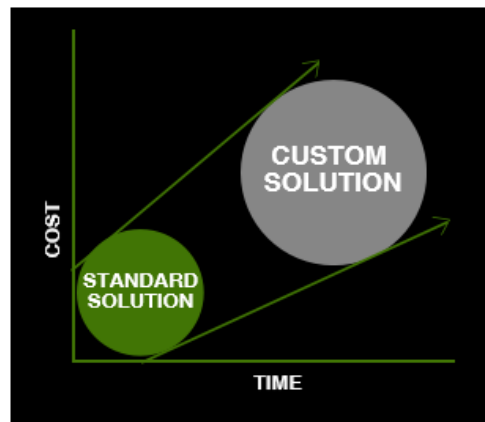
- Implementations are more complex, requiring expensive consulting billable hours and impacting more of your team’s time
- Getting data out of the system requires extensive reports customization and creates risk of future change costs when requirements change
- Future upgrades are custom for each client and costly
- The only people that truly understand the design and configuration of the system are the ones that built it (i.e. either the vendor or consultant).

Top 3 Strategies for a Successful EHS Software Implementation

Whitepaper

A **simplified, quick, and standardized solution** is built for hundreds—or even thousands—of users. The user interface can be customized (e.g. show or hide fields) to fit each client’s end users’ needs. Such a solution can be implemented in weeks, versus months or years. With this type of system, data output becomes significantly easier and includes dynamic dashboards for more flexible information visibility. Furthermore, future upgrades are included as part of the annual software subscription fee, saving you a substantial sum.

Efficient & Quick Implementation



- Complex implementation
- Data output challenges
- Consultant-intensive (3X software fee)
- Upgrades/maintenance costly
- Easy to use, for many employees
- Easy data output (e.g. dashboards)
- Standard services (0.5X software fee)
- Upgrades included

Customized solutions, however, typically require significant vendor and/or consulting resources. Consultants tend to drive up service billable hours with unnecessary complexity. Long-term maintenance or modifications to this type of system will require the vendor or consultant to re-engage to support any changes, thereby driving up the cost to run and maintain the system. These so-called “flexible” systems (in reality, requiring significant configuration of custom field definitions and complex workflows) are designed for a handful of expert solution architects, rather than everyday users. Data output of customized systems is complicated and time consuming; dashboards are static, and not dynamic, because the underlying database is unstructured, demanding custom reports. Future software upgrades are often come at a steep price, and are not included in the annual subscription fee. The bottom-line is that creating initial data input flexibility (with a “customized” system) creates extensive rigidity and expense—regarding data output—further down the road.

Many consulting firms partner with vendors seeking lucrative, complex implementations, because it means more billable hours. If you have decided to hire a consulting firm to help in the purchase process, be wary that these corporations have their own agenda and that, despite their claims of being “vendor neutral”, that’s almost never the case. Consultants tend to push a particular system that they have expertise supporting, which may take more billable hours to implement or will require the consultant to stay engaged in long-term maintenance and support of the system. First year implementation fees should not be more than 75% to 95% of the annual software fee. If they exceed

Top 3 Strategies for a Successful EHS Software Implementation

Whitepaper

this number, you will be stuck with a complex, custom system that will be overly expensive to maintain in the future.

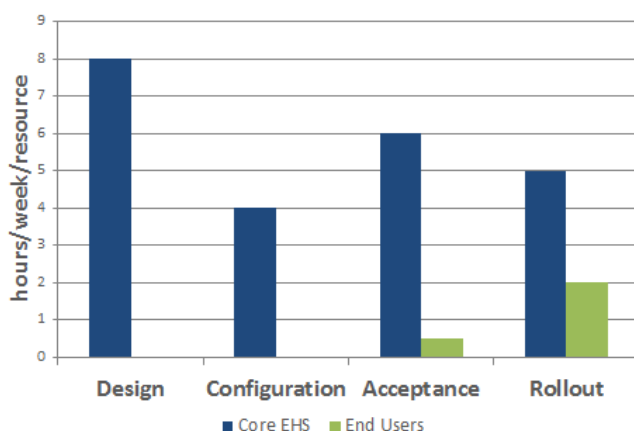
2 | DISCIPLINED AND DOCUMENTED IMPLEMENTATION PROCESS

A disciplined and efficient implementation process consists of **five key steps**:

1. **Design**
2. **Configuration**
3. **User Acceptance Testing**
4. **Training and Rollout**
5. **Change Management**

Adhering to these principles will minimize overall client-resource impact and will ensure a software rollout that meets the expectations of hundreds or thousands of users, driving high user adoption and increased enterprise connectivity and information visibility. Most companies prefer to implement a simple solution used by a high volume of employees, rather than a sophisticated, feature-rich system that is too difficult for the average user.

Low Client Resource Impact



The adjacent schematic illustrates the typical time impact on client resources during each of the first four stages of a standardized implementation. The initial **DESIGN** phase is important and includes a kick-off design session, including collaboration with key EHS users to assess current data to be migrated and reports needing configuration. Roles and responsibilities are also established in conjunction with a basic project plan. The design phase includes the creation of a Solution Configuration Document (SCD) which is mutually agreed to up front and serves as the “blueprint” for the ensuing configuration

phase. The SCD will capture the institutional knowledge within an organization or employees and document how this relates to the software. It also provides an “as-built” blueprint for others to use

Top 3 Strategies for a Successful EHS Software Implementation

Whitepaper

later in making modifications, additions, or bringing new modules online. This upfront investment of time saves *more* time later—making changes to a poorly configured system is a time-consuming, costly and wasteful alternative.

The **CONFIGURATION** phase of a systemized implementation includes a balance of client and vendor resources. The advantage of this approach is that core EHS users become experts *during* configuration, prior to user training and rollout. A systemized solution implementation also typically includes installation spreadsheet templates to accelerate the configuration process. A customized solution, rather, is typically too complex to include client resources and self-install templates do not exist, because each implementation is unique and custom. Or worse, some budget-constrained clients may be left alone to customize a complex, software system from a blank slate, demanding significant time and resources.

The **USER ACCEPTANCE TESTING (UAT)** phase enables users to validate the configured solution against the pre-defined SCD. The UAT period typically involves core EHS users hands-on, interacting with vendor resources.

The **TRAINING AND ROLLOUT SUPPORT** phase, during the initial stages of operation, provides a safety net to new users getting familiar with the. It is critical that a vendor provide this support to fortify hands-on training sessions. This rollout period also includes regular follow-up conference calls.

The **CHANGE MANAGEMENT** phase typically occurs after users have been trained and the system is in use in the enterprise. Typically, end user feedback and experience will yield new ideas toward optimizing the user experience for the long-term. It is important to budget for Change Management in conjunction with the vendor, as an optional task.

3 | **USER ADOPTION**

A successful EHS program requires a centralized, enterprise-scale software system that enables quick, standardized implementation and a simplified user experience for a high number of employees across all levels of the company. The more users feeding the central EHS database, the more visibility and transparency you will have, helping you significantly reduce risk. There are several characteristics of a simplified user experience to yield high user adoption:

Top 3 Strategies for a Successful EHS Software Implementation

Whitepaper

First, the software should be module-based, providing the option to roll out the system in stages to optimize user impact and budgets. Sometimes it is easier to train new users on one or two simple modules, instead of a broader solution.

Second, many casual, non tech-savvy users are not comfortable logging into an intimidating enterprise software system. However, outfit these same employees with a smartphone and intuitive touchscreens, and user resistance decreases dramatically. The new EHS mobile apps on the market offer the ability to collect data very easily (even while offline for long periods of time), snap photos or videos as part of an audit or inspection, and trigger alerts and notifications to take action. Moreover, these mobile apps can be implemented in *minutes* and users can self-train to be up and running immediately.

Many of the older technologies on the market require heavy customization (i.e. custom fields and workflows) and typically result in a user interface that is too complex for the casual user on the go. These systems promise to look and function any way a client desires, but the harsh reality is that it all comes at a steep premium in required time, resources, and extensively complex maintenance. Implementations take months, or even years, and require a specialized resource to run and maintain. Systemized solutions— including intuitive mobile apps—simplify the user experience, promote high user adoption, and can be implemented in half the time of traditional vendors. In purchasing the best EHS software solution for your enterprise, keeping these strategies in mind is critical.

Finally, and sometimes overlooked, strong and experience EHS subject matter experience is an essential ingredient to success—in setting up the system correctly to begin with and with ongoing user adoption. For example, over time the EHS Admin should assimilate end user inputs and develop ongoing tailored training in doses, as well as work in conjunction with the vendor to make configuration changes to the system to optimize the user experience.