2020

SAFETECH Synergy

Elevating **QHSE** with Industry Best **Technology!**

Presented by ITRAK

Thursday, May 28 11:15 AM (MST)

SECURE ENERGY: Implementing Competency

ISV Connect Premier Tier Partner

ITRAK 365

Microsoft Dynamics 365 Certified

Microsoft

www.useitrak.com

INTRODUCTIONS – The Presenter

Kevin Collins

Business Tools Analyst

SECURE ENERGY

ITRAK 365

AGENDA

01 Review of Implementation Tips from Last Year

02 Why Modernize Competency – Importance to SECURE

03 Pre-Project Activities (Foundation & Due Diligence)

04 Discovery & Partnership with NeoSystems ITRAK

05 Implementation Strategy – What was Implemented – The Value

06 The Future Q&A

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INTRODUCTIONS – The Organization

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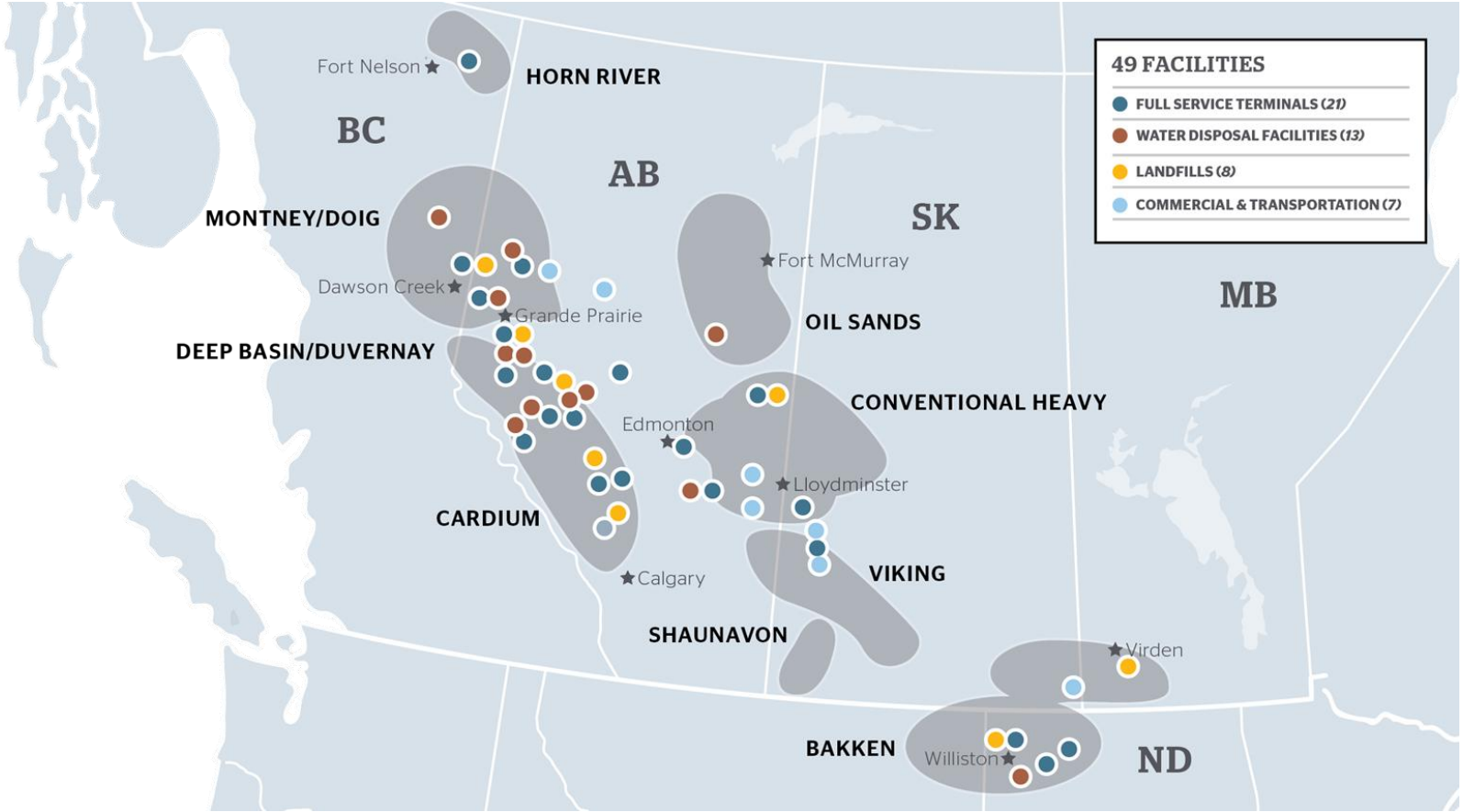

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1 – Implementation Tips Review

5 Tips for a Successful Implementation

1. PLAN → DEVELOP → IMPLEMENT
2. Stakeholder Engagement – Let the Business Take the Wheel
3. Keep it Simple for the End User
4. Less is More – Take the First Logical Step
5. Train → Coach → Audit → Re-train

2 Keys to Sustainable Management

1. Governance – Accountability & Change Management
2. Reporting – Get the Data to Operations

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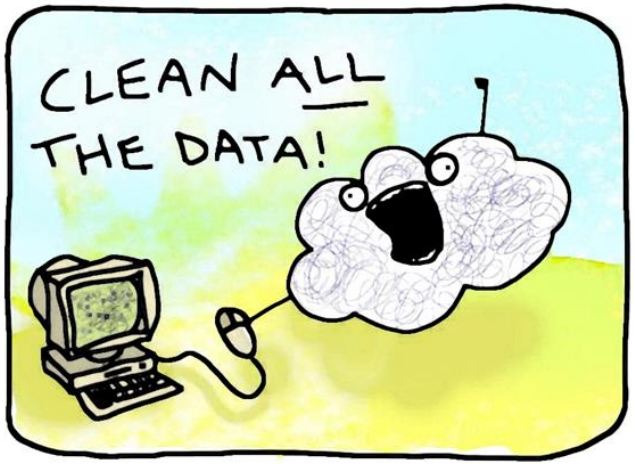
1 – Implementation Tips Review

6 Recommendations for Clean Data

1. No Free Enter
2. Mandatory Fields
3. Only Include Critical Fields
4. Master Data
5. Mutually Exclusive Term Sets
6. Keep It Intuitive – Or – Provide Clear Instruction



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2 – Why Modernize Competency – 5 Reasons

1. Aligned with Long-term Corporate Strategy
2. Go Home Safe: Reduce Risk to SECURE Operations
3. Foundation of Talent: Promote Growth of SECURE Employees
4. Optimize Business Tools: Efficiency

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2 – Why Modernize Competency

5. These guys asked for it!

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2 – Why Modernize Competency

Issues with the Existing Program

- Hardcopy Records
- No Reporting / Auditability
- No Accountability
- No Standardization
  - Task List
  - Risk Ranking – Critical Tasks
  - Sign-off
- Resourcing & Growth
- Misnamed (Short Service Worker)

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2 – Why Modernize Competency

Issues with the Existing Program

- **Hardcopy Records** → **TIP: Reporting – Get the data back in Operations' Hands**
- **No Reporting / Auditability** → **TIP: Reporting – Get the data back in Operations' Hands**
- **No Accountability** → **TIP: Governance – Accountability**
- **No Standardization** → **TIP: Master Data**
  - Task List
  - Risk Ranking – Critical Tasks
  - Sign-off
- **Resourcing & Growth** → **TIP: Train, Coach, Audit, Retrain**
- **Misnamed (Short Service Worker)** → **TIP: Keep it Intuitive**

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2 – Why Modernize Competency

Training & Competency is the **Foundation** of any Great Safety Program

A **Competent** Employee = A **Safe** Employee = An **Efficient** Employee

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3 – Pre-Project Activities - Foundation

Original Scope:

Actual Scope:

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3 – Pre-Project Activities - Foundation

Original Scope:

Actual Scope:

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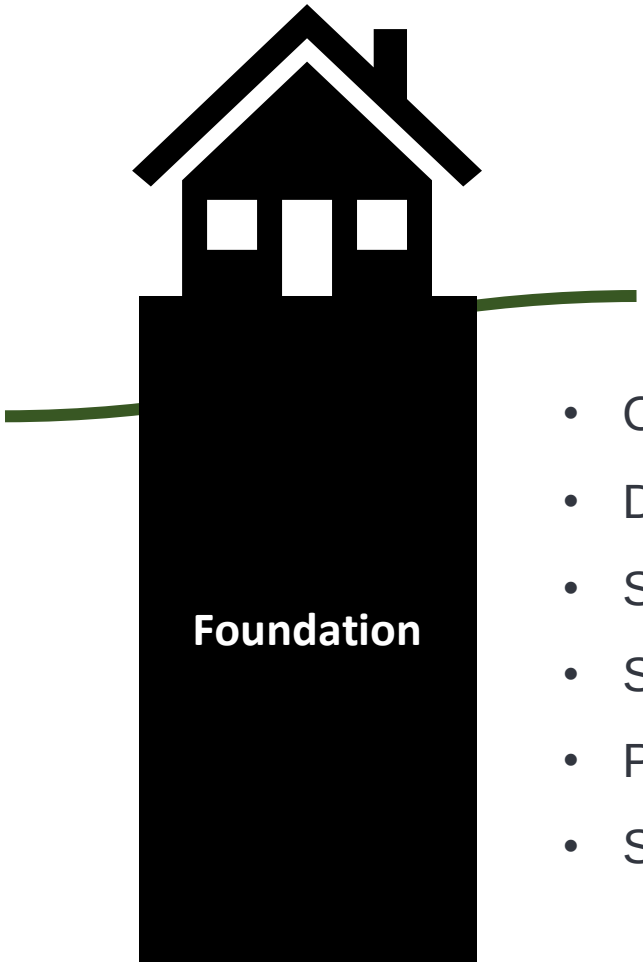
3 – Pre-Project Activities - Foundation



TIP: PLAN → DEVELOP → IMPLEMENT

- Ownership / Accountability / Resourcing (Governance)
- Defined Process (Current State vs. The Ideal)
- Standardized Task List – Competencies
- Standardized Training Matrix - Training
- Procedure Risk Assessment Framework
- Standardized H&S Nomenclature

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3 – Pre-Project Activities – Due Diligence

How do we know our trainers (Lead Operators) are competent?

- We didn't!

Where do we draw the line?

Operator assessed by: **Lead Operator**

Lead Operator assessed by: **Facility Manager**

Facility Manager assessed by: **General Manager**

General Manager assessed by: **VP of Operations…**

Pretty soon our **COO** is being assessed by our **CEO**

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TIP: Less is More – Take the First Logical Step

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3 – Pre-Project Activities – Due Diligence

How do we know our trainers (Lead Operators) are competent?

- We didn't! – Now we do!

We developed a process by which our Operations Support Advisors & Safety Advisors Teams visited every site to:

1. Re-train all Lead Operator on how to do a proper Competency Assessment
2. Assess the existing hardcopy competency records at the facility.
3. Perform a checklist style assessment to identify training gaps & non-competent trainers.

Competency - Lead Operator Training & Assessment Record				
Operator Name	**Facility**			
Ops Support and/or Field Safety Advisor Name	**Date**			
Training				
Competency Assessment (formerly JTO) Training complete?	☐			
Assessment				
A - Critical Task Walkthrough (Tabletop)				
Task Name	Communicate Steps	Identify Hazards	Identify Controls	Notes
	☐	☐	☐	

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4 – Discovery & Partnership w/ NeoSystems

BI Dashboards

Single Sign-on

Multiple Form Categories

Cloud Migration

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SAFETY & COMPLIANCE SOFTWARE

Rename the “Next” Button

Confidentiality

Excel <-> CRM Data Pull / Rewrite

Azure Data Replication

Capital Projects Custom Tool

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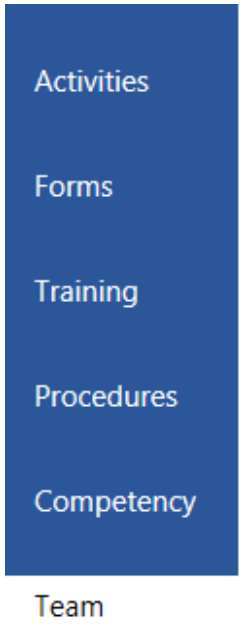
NeoSystems

4 – Discovery & Partnership w/ NeoSystems

Don’t make the business fit the tool, make the tool fit the business.



Development Items - Specifically for SECURE TRAC

- Reporting Teams
- SECURE Specific Task #
- Process Area & Sub Process Area Fields
- Critical Task Assignment & Recertification frequency automated via risk
- Changes to all standard views
- Automatic Approval of Training Records

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5 – Implementation - Strategy

Training

Sessions

- On-site Competency Assessment Training
- Microsoft Teams ITRAK & TRAC Program Training

Material in Place

- Schoox Module 1 – Operator Training
- Schoox Module 2 – Assessor Training
- TRAC Training Manual
- TRAC Training PPT
- Competency Assessment Guide
- Task Rename Look-up tool

Phased Approach

Phase 1 – Awareness & Assessment

- Awareness Module on our LMS (Schoox)
- Lead Operator Assessment
- Competency Assessment Training
- SSW Record Assessment

Pilot

- Tool Setup & Training @ 5 different facilities.
- Feedback & Tool Improvement

Phase 2 – Full Implementation

- Tool Setup & Training @ 40 facilities
- Lead Assessment Action Plan Execution

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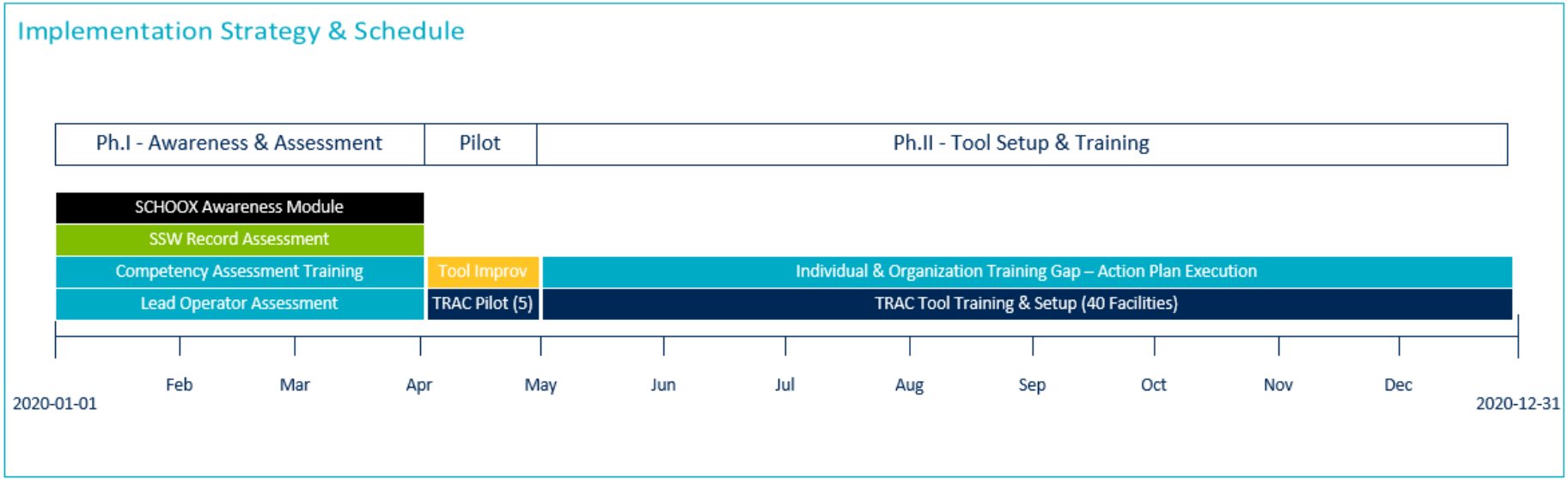
5 – Implementation - Schedule



TIP: PLAN → DEVELOP → IMPLEMENT

TIP: Stakeholder Engagement – Let the Business Take the Wheel

TIP: Train → Coach → Audit → Re-train

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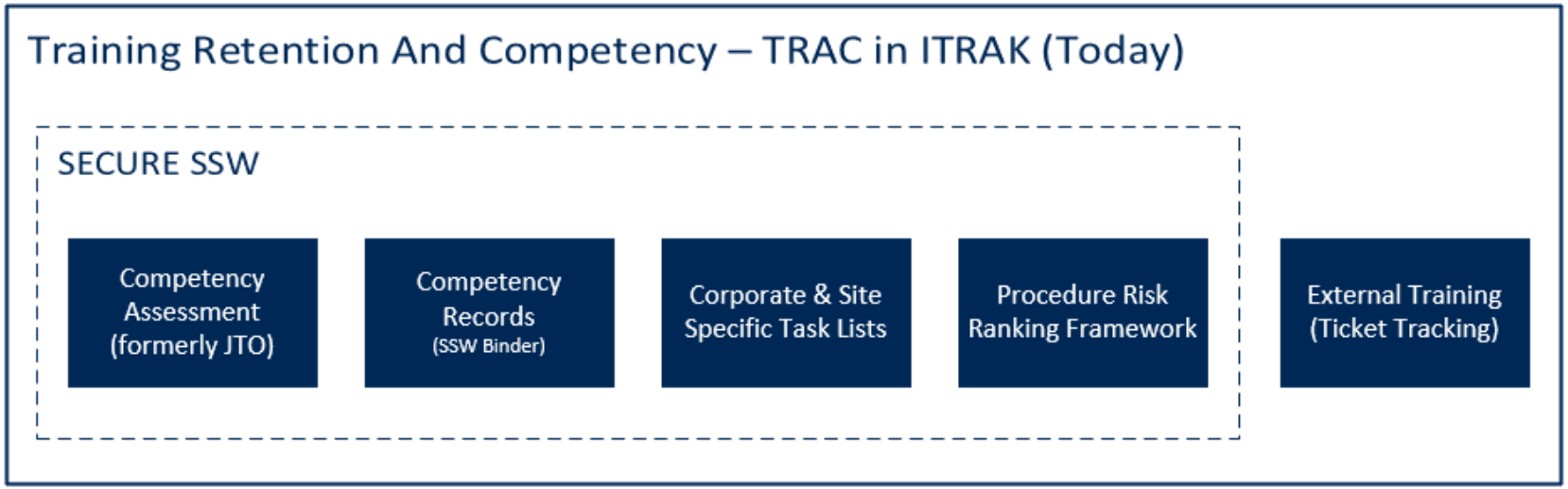
5 – Implementation – What was Implemented



TIP: Less is More – Take the First Logical Step

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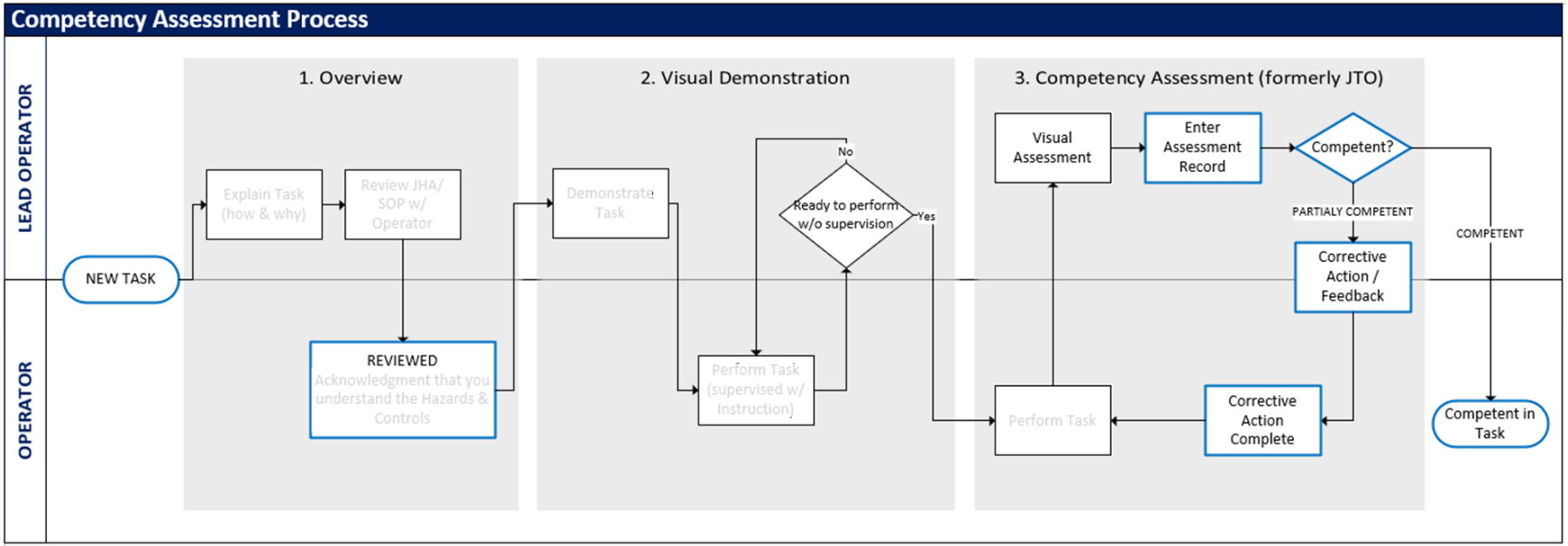
5 – Implementation – What was Implemented



TIP: Keep it Simple for the End User

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5 – Implementation – The Value

Immediate Value	
Increased Efficiency	Operators can focus on the actual training rather than the administration of it.
Increased Accountability	Roles are defined, and data is available to hold ourselves and each other accountable
Increased Auditability	All training and competency data is available to anyone at SECURE within seconds
Decreased Support Required	Automation of controls and intuitive user interface means OSA / FSA need to spend less time auditing, training and coaching.

Future Value	
Increased Technical Competence	• Reduction in workplace incidents • Increase in facility throughput
Targeted Training for Facilities & Support Teams	
Reduced Overall risk to SECURE	• Safety • Regulatory • Reputational • Financial

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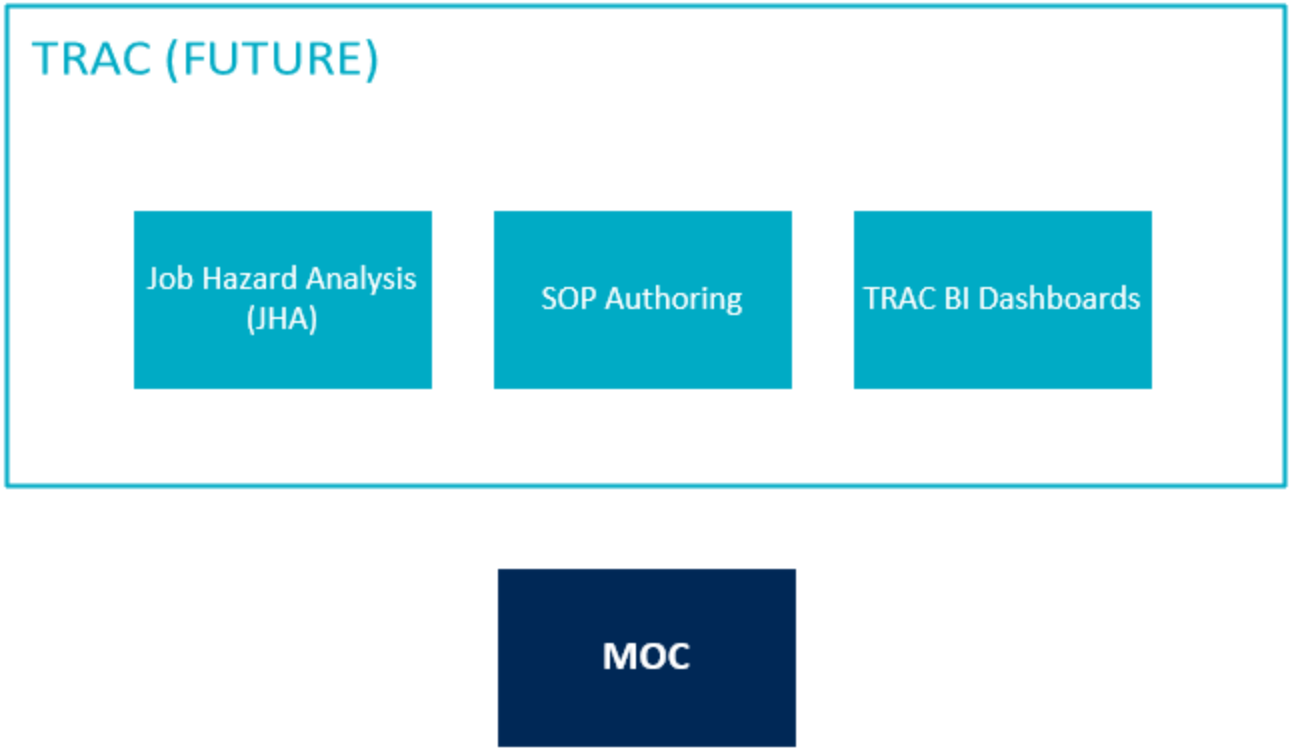
6 – THE FUTURE



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