



THE BIG SECRET: YOU ALREADY HAVE THE SOFTWARE YOU NEED TO MANAGE EHS PROGRAMS

MIDWEST ENVIRONMENTAL COMPLIANCE CONFERENCE (MECC) | SEPTEMBER 27, 2023

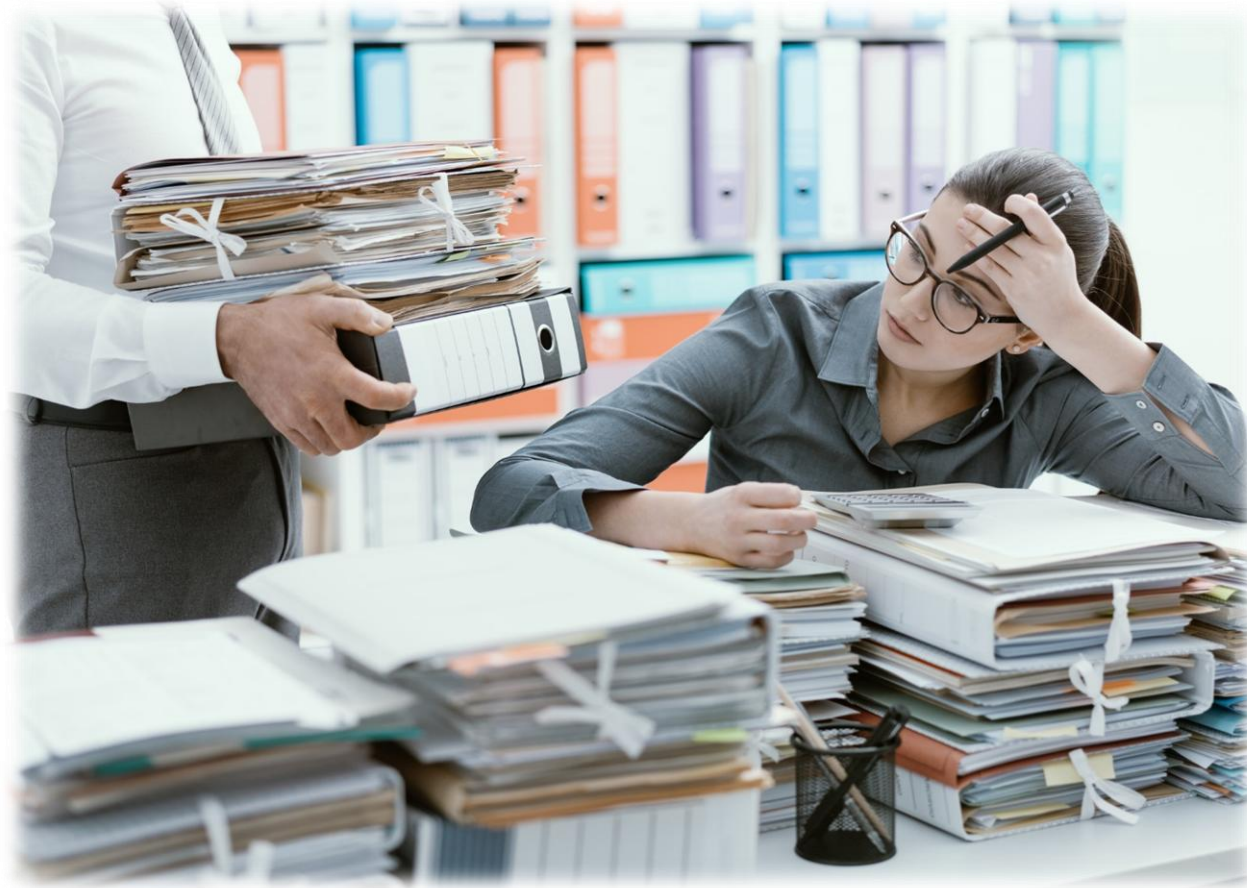


INTRODUCTION

- EHS, food safety, and quality consulting firm based in Madison, WI & Atlanta, GA
- EHS services include:
 - Auditing & assessments
 - ISO-based management systems development & implementation
 - Regulatory compliance assistance (EPA, OSHA, DOT, state, local)
 - Information management solutions
 - Training
- Tailored solutions to address compliance & certification requirements
- Focus on building strong, long-term client partnerships
- Information & data management solutions with Microsoft 365®



LOOK FAMILIAR?



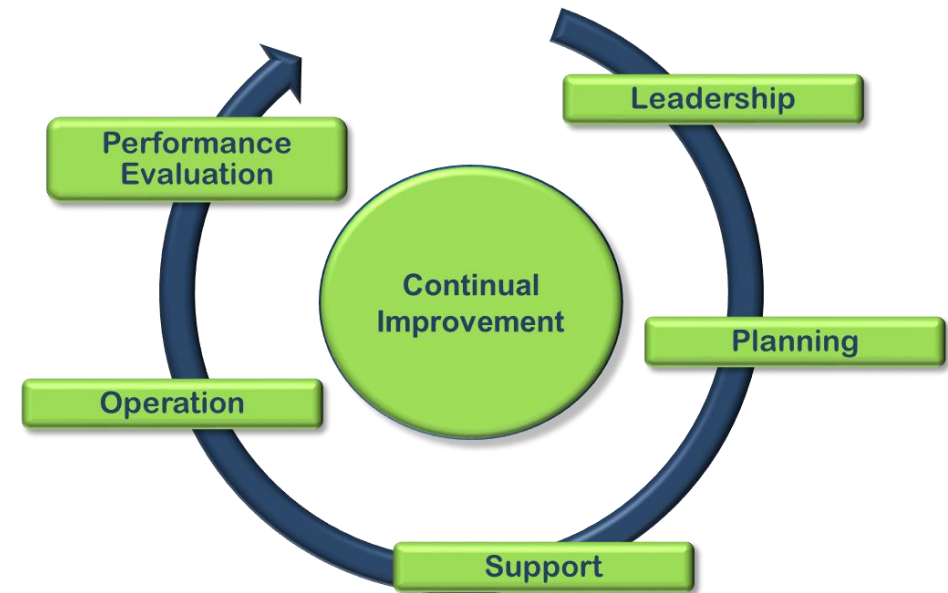
CHALLENGES

- Complex regulatory requirements
- Limited resources (staff, budget, time)
- Staffing & turnover
 - Easy to lose institutional knowledge
 - Hard to find qualified replacements
- Burdensome documents & data
 - Death by 1000 spreadsheets!
 - If it's not documented, it's not done!
- Expensive & complicated software



APPROACH

- Use a formal management system approach: Plan – Do – Check – Act (PDCA)
- Get management support – this is key!
- Identify & understand requirements
- Define roles & responsibilities
- Leverage cross-functional teams
- Monitor performance
- Leverage appropriate/available IT tools...



MICROSOFT 365/SHAREPOINT®



- Low-cost, in-house platform supported by most IT departments
- Familiar Microsoft tools
- Webpages, documents, data, dashboards in one platform
- Easy to integrate existing data
- User-customized with web browser

KEY FEATURES

- Mobile forms
- No programming
- Track requirements & tasks
- Send/receive email notifications
- Upload & manage documents, data, and records
- Real-time, interactive dashboards

The screenshot displays a mobile inspection form. At the top, there is a back arrow and a dropdown menu showing 'Area 01 - Flam. Rm.'. Below this is a list of inspection items, each with a score in a colored box:

- All ceilings and walls are clean and in good condition (e.g. no excess...) - Score: 3 (Red box)
- All floors, including pick slots, are clean and in good condition (e.g...) - Score: 1 (Green box)
- All dock doors are clean, free of damage and in good operating condi... - Score: 1 (Green box)
- Roll-up forklift doors, emergency exits, interior & exterior pedestria... - Score: 2 (Yellow box)
- Pallet rackings are clean and in good condition (e.g. no debris in rac... - Score: 1 (Green box)
- Forklifts, pallet jacks, etc. are clean and in good condition (e.g. no... - Score: 3 (Red box)
- Pallets in use are clean and in good condition with no significant pro... - Score: 3 (Red box)
- Lighting is adequate to permit effective inspection. cleaning and work... - Score: 1 (Green box)

The 'Roll-up forklift doors...' item is selected, showing a detailed view on the right. This view includes:

- Question:** Roll-up forklift doors, emergency exits, interior & exterior pedestrian doors (as applicable) are clean, in good operating condition and being used properly (e.g. no pedestrian using a roll-up forklift door)
- Category:** Facilities
- Score Details:** A dropdown menu showing '2' and a 'Comments' field with a 'Save' button.
- Attachments:** A section showing an attached file 'IMG_0640.jpg' with an 'Unsaved' status and an 'X' to close it. Below it is an 'Attach file' button.
- View Attachments:** A red button to view the attached images.
- NOTE:** Pictures take approximately one minute after saving to be viewable.



EXAMPLES – LIVE DEMONSTRATION

Office 365

BROWSE PAGE

Food Safety Management System

Home

Approved Suppliers

Company U

Calendar

CAPA Tool

Chemical Inventory

Customer Complaints

Daily Compliance

Dashboard

Maintenance

Rolling Action Items

Shipping & Receiving

Verify Records

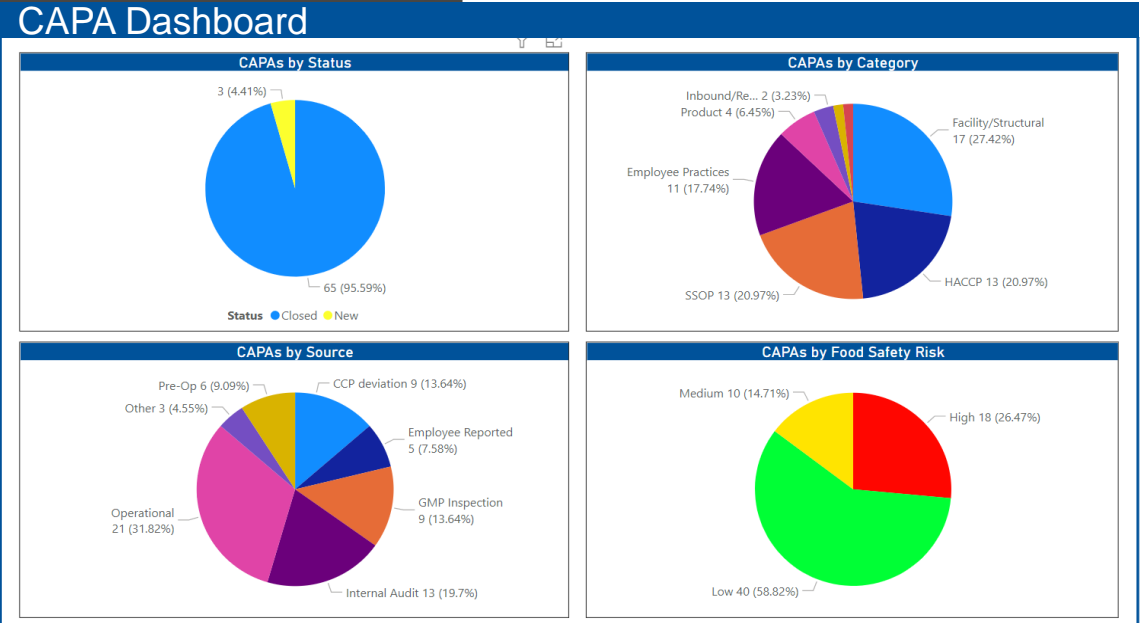
Rolling Action Items

Today

April 2022

All Tasks Calendar Completed ...

Action Item Description	Date Opened	Du



Daily Compliance

Ambient Temperature Log

GMP Audit

Finished Allergen Project Log

Operational Inspections

Metal Detector Monitoring

Nightly Cleaning

Pre-Op Checklists

Sharp/Knife Inspection

Sanitation Pre-Op

Sanitation Pre-Op Freezers

Scale Calibration

Thawing Temp. Log

Thermometer Calibration



BENEFITS

- Simplify management of compliance requirements & task assignments
- Capture institutional knowledge to ensure operational continuity/sustainability
- Easily retrieve records
- Prepare for regulatory inspections
- Monitor performance & ensure continual improvement



HOW DOES THE PROCESS WORK?

- Start with something simple that is already working well
- Set priorities based on compliance risk, needed business improvements, ease of implementation & overall value
- Build with the end in mind – design should allow for efficient scale up
- Develop at your pace & budget
- Build a system familiar to employees, introduce gently, encourage buy-in

- Current systems & tools?
- Status of existing processes?
- New or existing data sources?
- Organizational complexity?
- Compliance status?



WHAT WILL MY IT DEPARTMENT WANT TO KNOW?

- Built & runs on your existing Microsoft 365 platform
- System, information & data are yours – no outside licenses or software fees
- Easily incorporates existing program documentation & data
- Minimal IT department support needed
- Your staff will be trained to manage the system
- Scalable outside support – can be accessed, supported, even managed by a third-party vendor, if needed
- Wi-Fi accessibility is key for mobile form use





CONTACT US

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