



Simplifying the EHS Document and Data Management Burden

*Midwest Environmental Compliance Conference
Chicago, IL – November 3, 2016*

Joseph Tell



Areas of expertise:

- EHS strategy and management systems
- Stakeholder engagement and training
- EHS compliance support
- Multi-media auditing
- Information management systems



Tellevate, Owner and Director

- 20 years in EHS management and compliance consulting
- Founded Tellevate in 2011
- Extensive industry and government experience
- B.S. Civil Engineering, Northwestern University



Simplifying EHS Document/Data Management



Challenges

- EHS is still seen as a cost
- Constant pressure to do more with less
- New systems all the time
- Data overload
- Instant communication culture = more interruptions
- Push for more transparency



Simplifying EHS Document/Data Management



Are we EHS professionals, or...?

- Analysts
- Auditors
- Authors
- Database managers
- Document administrators
- Engineers
- Inspectors
- Lawyers
- Librarians
- Mathematicians
- Meeting planners
- Programmers
- Project Managers
- Records clerks
- Scientists
- Webmasters



Simplifying EHS Document/Data Management



Look familiar?



Simplifying EHS Document/Data Management



6 Keys to success:

1. Get started
2. Keep it simple
3. Innovate, but leverage existing resources, systems and tools
4. Don't be fooled by the "bells and whistles"
5. Don't let software define your process
6. Change is difficult, don't rush it



Simplifying EHS Document/Data Management



1. Get started

- Schedule time to focus on process improvements
- Assess current information management practices
 - Inventory of existing systems and tools
 - What works, what doesn't?
- Form a workgroup of key stakeholders to help
 - Not too big
 - Invite IT staff to participate
 - Shop floor and management reps
- Interview stakeholders to define their needs



Simplifying EHS Document/Data Management



2. Keep it simple

- Differentiate between “must haves” and “nice to haves”
- Don’t overlook simple or obvious solutions
- Benchmark with peers to identify opportunities to leverage existing tools
- Short, mid and long term goals (SMART)
- Baby steps are ok. Get some early “wins”.
- Ask “What can we do with existing resources?” before looking to buy

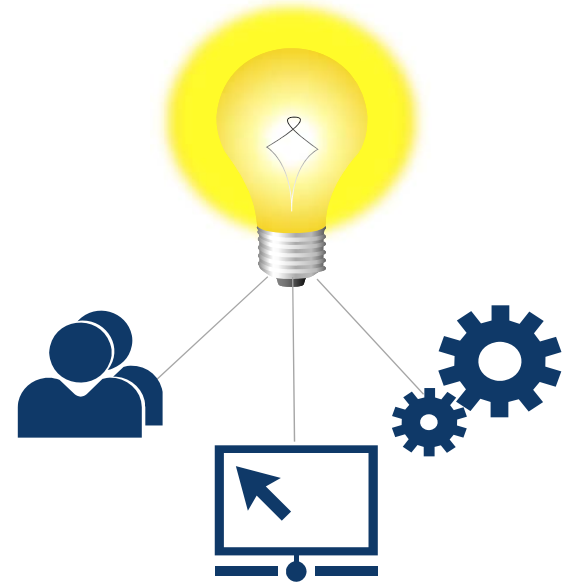


Simplifying EHS Document/Data Management



3. Innovate, but leverage existing resources

- Existing staff and funding
- Current/approved projects
- Organization IT tools:
 - Internally developed
 - Microsoft suite
 - Other licensed software
 - Intranet sites
 - Platforms and tools used by other departments (e.g. Quality, HR, etc.)



Simplifying EHS Document/Data Management



4. Don't be fooled by:

- Off-the-shelf software providers that promise the sky
- Belief that buying software will solve the problems in your process
- Unexpected customization costs for “extras” that should be included
- Hidden maintenance and service fees



Simplifying EHS Document/Data Management



5. Don't let software define your business process

- Define your business process first
- Develop functional requirements based on defined process, results of assessment, user needs, and goals
- Now you can shop for software (if that is the decision)
- Make sure software complements your process – not the other way around



Simplifying EHS Document/Data Management



6. Change is difficult, don't rush it

- Don't underestimate challenge of behavior and culture changes
- Planning is paramount
- Make sure you have management buy-in
- Engage key stakeholders early and empower them
- Focus on the 80%
- Take small, achievable steps to show early progress and benefits – builds momentum



Simplifying EHS Document/Data Management



Example of leveraging an existing system: Microsoft® SharePoint® EHSMS

- Centralized information portal (intranet)
- Many organizations already have it
- Web pages, files and database tools in one platform
- Existing documents/data easily uploaded and managed
- User-customized with web browser

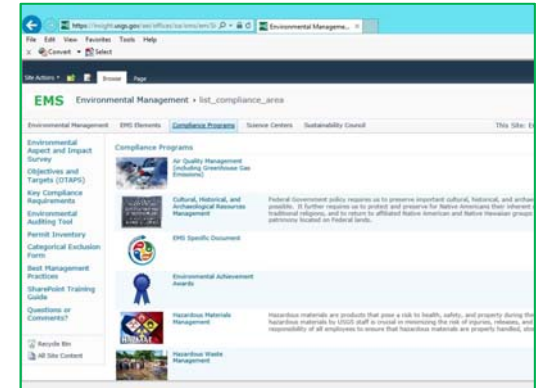


Simplifying EHS Document/Data Management



SharePoint® EHSMS Benefits

- Low cost, existing solution
- Supported by in-house IT
- Microsoft tools familiar and easy to use
- Reduces document/data management and recordkeeping burden
- Streamlines communication and collaboration
- Captures institutional knowledge



QUESTIONS?

Joseph Tell

404.538.5494

jtell@tellevate.com