



Regulatory Service Management, Compliance and Risk Management

Safety Plus, Inc., founded in 1991, has grown to be a leader in safety service, management, and software. Based in Mobile, Alabama, Safety Plus provides consultation services protecting tens of thousands of workers spread across hundreds of companies throughout the United States. These critical compliance programs and offerings are focused on a diverse array of industries including construction, manufacturing, oil & gas, distribution, municipalities, and more. The firm's offerings are comprehensive, addressing and managing all aspects of a client's safety, health, industrial, and environmental requirements. Services include safety training, facility audits & site-inspections, claims management, accident investigation, safety policy authoring, OSHA, USDOT, MSHA, and EPA compliance. Additionally, Safety Plus is a leader in safety management software. Given their internal need for such a system, they developed SafetyPlusWeb™ and today provide the system to hundreds of companies throughout the country.

The Workflow Challenge

Accelerating demand drove the need for Safety Plus to scale up headcount as they addressed a growing marketplace opportunity. An increasing number of clients were paralleled by an increase in the average size of client while Safety Plus was also broadening out their service offering in response to this demand. The key performance indicators needed to help guide this thriving organization's increasingly critical decisions were simply not available. Customer expectations regarding the timely availability of engagement details, artifacts, updates and reports were also increasing, placing additional pressure on the team that was already running hard to manage their growth. Existing processes were for the most part manually tracked, paper-based, labor intensive, and difficult to manage.

In order to maintain and build upon a trend of solid double-digit increases in revenue, the need for process improvements was increasingly seen as essential, and timely. The organization was committed to ensuring that their reliable customer service was not compromised while they grew. Yet the firm's ever-expanding set of deliverables, volume, and complexity of work were continuing to rise, leaving little time to invest in working with programmers to articulate the requirements necessary to build the automation. This urgency was increasing not only for strong orchestration,

Testimonial

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— Robert Gagnet,
VP of Operations

Challenge

- Manual Processes and Work Management
- Decentralized Work Artifacts and Documents
- Process Control Gaps and Growth Pressures
- Customer Data Calls and Performance Management



but also for increased process and quality controls. Safety Plus customers are bound to immovable regulatory deadlines requiring consistent, accurate, and timely service delivery, and failure could quickly lead to costly penalties.

A viable solution for these requirements would not only have to serve as a work manager and an organizational metronome with an audit-ready system of record, but it would also need to empower the busy subject matter experts at Safety Plus to configure a tailored solution quickly, for themselves. They knew better than anyone what best practices they wanted to design. What they wanted to find was a solution that could effectively facilitate the standardization of delivery for these key client-facing processes and deliverables *and* address the orchestration of this work, at scale. Recognizing these numerous challenges might be tough to find in one offering Safety Plus put together a team to begin the search, evaluating various collaborative work management and workflow software solutions to see if any could address all of these requirements for them.

The HighGear Solution

After researching a variety of available market options, Safety Plus selected HighGear and placed it into production to manage and orchestrate all customer-facing work. Safety Plus personnel were able to learn to configure and manage HighGear's no-code workflow software internally, quickly proceeding to build out and continuously advance their own tailored workflow without writing a single line of code, and without requiring any costly outside services. The entire process, from starting to evaluate vendors to selecting and learning HighGear, to ultimately deploying HighGear was completed in under 8 weeks. The workflow software they developed through HighGear provided unified access to client profiles, case management details, safety

Solution

- Collaborative Work Management
- Centralized Artifact and Document Library
- Self-Managed Workflow and Process Controls
- Real-time Reporting & Performance Analytics

Implementation

The entire process from discovery to deployment was completed in under 8 weeks.

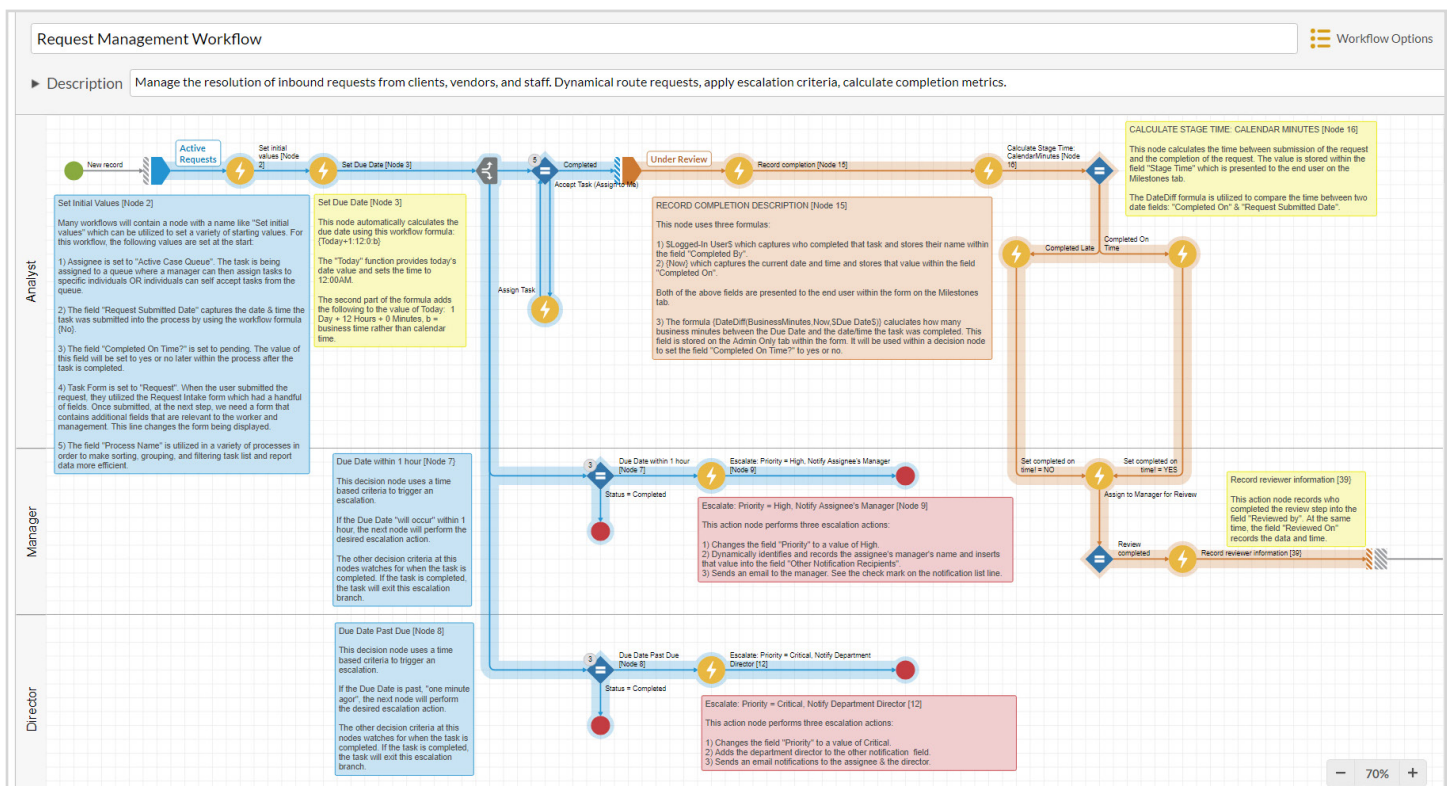
audit records, contract details, records of billable services conducted, software implementation task notes, sales opportunity records, reminders, and investigation records for a variety of safety, compliance, and regulatory matters, along with numerous other items. Dashboards of well-organized information provided orchestration and decision-support, leading to HighGear being quickly adopted by all stakeholders and employees, while also providing unexpected differentiation and value for a rapidly expanding customer base. HighGear was made directly accessible to key clients so that they could track and monitor the progress of their own requests, in real time. Virtually every task, piece of work, and activity conducted by any employee of Safety Plus, whether internal or external, is tracked and managed in HighGear.

Safety Plus leveraged HighGear to make planning, orchestrating, and reporting on engagements easier for supervisors and staff alike. Prior to deploying HighGear, there was a clear need for more organized documentation and greater visibility into the work being done by their growing team. These previously manual processes were now being converted into electronic fields, forms, workflows, and dashboard analytics, through HighGear. The Safety Plus innovation team quickly moved on from problem-solving towards using HighGear to innovate the way they work and to produce net new automated client-facing services, enabling Safety Plus to both maintain and press their leadership advantage.

Testimonial

"Clients now rely more heavily upon Safety Plus so much so that we have become an extension of our clients' internal safety and compliance programs."

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Workflow Example: Managing inbound requests from clients, vendors, and staff.

The Results of Automation

The implementation of HighGear exceeded the original goals, not only empowering Safety Plus to continue adding work and customers without impacting quality, but also enabling them to do so without significantly increasing their staff size.

"Staffing would have to be double or triple what it is today without HighGear. HighGear allowed us to scale our client base by more than 700% while only adding an occasional employee to our headcount. Documentation, organization, and awareness have all greatly improved for the business while we also achieve a higher level of service quality for our customers." Taylor Engerson – President / General Manager, Safety Plus, Inc.

"We now also have accurate and reliable data with which to evaluate the performance of all of our employees. Clients now rely more heavily upon Safety Plus so much so that we have become an extension of our clients' internal safety and compliance programs. We couldn't have achieved these results without a robust system like HighGear." (Vice President of Operations, Robert Gagnet).

While Safety Plus, Inc. has needed to add employees over the years, HighGear has automated a great deal of low value organizational management, enabling the team to take on more meaningful work including allowing senior management to focus on developing new product and service offerings to further expand the business, and increase profitability.

Hundreds of thousands of projects are processed through HighGear each year. While informal processes were only capturing 25% of the data required for demonstrating performance to customers, 100% of all activities are now verifiably recorded through HighGear. Performance review meetings with clients now include empirical and detailed metrics clearly proving the value that Safety Plus delivers. Having thoroughly resolved Safety Plus's original operational growth requirements, the internal HighGear Workflow Champions have since turned to press the solution into other areas of the business, gaining additional ROI as they continue to digitally transform all areas of their business.

Key Results

- 700% Increase, Clients Served
- 75% Increase, Performance Data Captured
- Higher Service Levels and Customer Quality
- Increased Time for Staff to Engage Strategic Work
- Client/Vendor Relationships to Client Partnerships
- Increased Work Volume Without Corresponding Increase in Staffing



The No-Code Workflow Automation Platform

HighGear is the leading, visual no-code platform for business analysts to rapidly build enterprise-grade workflow applications. Businesses in regulated industries rely on HighGear to create custom workflow applications that easily drive adoption within their lines of business, instead of being forced to adapt to pre-built software or adding to the IT backlog for homegrown solutions. The world's leading companies depend on HighGear to manage work, improve visibility, streamline operations, meet compliance requirements and achieve digital transformation. Your workflow awaits.