

PARTNER CLIENT INSIGHT SERIES

Client insights on
digital innovation and
performance improvements.

Issue 1

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THE POWER OF DIGITISING IN-FIELD PROCESSES

ENGAGING LEADERS AT ALL LEVELS
TO CREATE AND APPLY THE DIGITAL
WORKFLOWS THAT DELIVER GROUND-UP
PERFORMANCE IMPROVEMENTS



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**Risk
Mentor**
New Zealand

The Risk Mentor Mission

**Partnering with clients
to create the wisdom
that improves decision
making from the frontline
to the boardroom.**



Continual harm
reduction



Distinct value adds



Exhibit leadership



Reduce costs

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RiskMentor
New Zealand

Case Study: PowerNet



Objective

Risk Mentor New Zealand was selected by PowerNet to help enhance safety for field teams, developing a customised, accessible digital platform to replace existing paper-based systems.

In addition to enhancing safety, the platform is designed to streamline compliance, to enable greater collaboration, smoother operations and provide timely and accurate performance guidance.

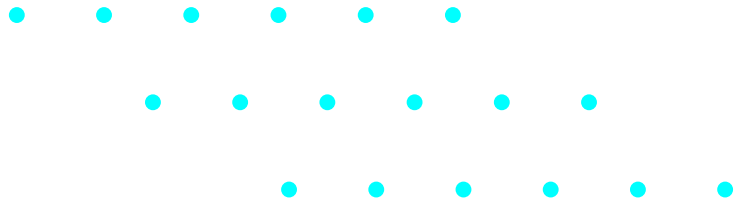
Harnessing worker engagement to create a People Centric Intelligent Solution

As New Zealand's fourth largest electricity management company, PowerNet builds, maintains, and manages electricity assets across most of southern NZ, helping deliver electricity to over 72,700 customers.

With over 1,500 safety and performance obligations, PowerNet had previously utilised a paper-based approach to safety management. PowerNet partnered with Risk Mentor (RM) to digitise and streamline safety protocols, using Control Framework architecture and the RM Platform to capture workforce, knowledge, experience, and know-how while systematically mapping company and external expectations.

The outputs from this groundbreaking approach are now used to assist PowerNet personnel to consistently apply critical controls and then verify that they are in place.

PowerNet has increased employee engagement, operationally integrated business systems and processes, while streamlining compliance and governance reporting. Most importantly, these performance improvements have delivered significant and sustained reductions in injuries and incidents.



The Risk Mentor Difference

A digitisation strategy driven by and for frontline workers

We engage with frontline workers, using their insight and experience to build the digital workflows that support safe and productive outcomes.

Through extensive collaboration with field personnel, we build and operationalise tools and processes that they need to work the right way.

Our digital workflows allow task level decision makers to demonstrate their professionalism. Using prompts and guidance they confirm that each work phase is planned, resourced, and completed to standard.

Total Workflow Activity to July 2024

51,700

Workflows completed

Total Sub Form Count to July 2024

138,860

Individual sub-forms completed

Total Workflow Step Decision Confirmations to July 2024

2.3 mil +

Confirmations, reported, logged, and available for analysis

Staff know what they need.
We just ask them.



PowerNet is New Zealand's fourth largest electricity management company, delivering electricity to over 72,700 customers across urban and remote rural areas.



Large strides have been made in the past decade to digitise resources and processes across several industries.

In sectors such as tech, healthcare and finance, information resources (content and links) have been digitised and are accessible by decision makers at all levels. While this approach delivers multiple business advantages, it requires coordinating systems, content and organisational functions.

For companies working in the power and natural resource sectors, the transition toward digital has to take into account where people work, what they do, and the scale and geographical spread of operations.

The business case for operational digitisation pivots on assisting frontline staff to make better decisions and utilising the information from how they are working. For an operation that is already performing well, it takes a proactive mindset and a commitment of time and resources to explore what the next step improvements might look like.

PowerNet began this journey by asking, *'How can we ensure all our field teams – wherever they are working – are consistently applying safety controls designed to keep them safe in the field?'*



As an organisation with over 1,500 obligations to adhere to during operational work, improving safety is a significant undertaking. PowerNet planned to find (or, if necessary, develop) a platform that would achieve three goals at once:

1. **In the field:** as a more practical, efficient way for staff to protect themselves at all times.
2. **In the depot and in the office:** to ensure supervisors, managers, and senior leaders can monitor field operations and make informed decisions based on real-time data.
3. **In the boardroom:** as a system that makes safety implementation and management more streamlined, and compliance simpler and more robust.

With these goals in mind, PowerNet began co-designing a digital platform to manage critical safety risks that could result in serious injury or death.



Words from our Partner Client

“This leading-edge tool is a game changer for health and safety in our industry. Having a user friendly tool accessible in the field is putting safety, consistency and clarity at the centre of everyday, on-the-job decisions about critical safety.

It is also opening the door to the development of other industry leading business and operational processes.”

Jason Franklin
PowerNet Chief Executive

+ THE NEED FOR A DIGITAL SOLUTION



■ INSIGHT

As organisations evolve, it's imperative systems and platforms are integrated to support task execution and capture real-time data. New approaches and well-configured technology transform existing and new data streams into information that can be leveraged for multiple business benefits.

Prior to co-developing the new platform with Risk Mentor, PowerNet had been using three separate paper-based hazard ID and risk assessment tools: *Take 5*, *Minor Worksite Safety Plans*, and *Major Worksite Safety Plans*.

Although these tools did effectively manage onsite hazards and risk, they had significant limitations, such as limited:

- Visibility to ensure critical controls were used;
- Ability to verify critical controls;
- Capability to measure control effectiveness;
- Capacity to keep up to date with current regulatory requirements;
- Options to introduce and verify new or updated controls;
- Digital functionality for aggregating information to generate performance reports and support analysis.

Previous systems were often generic, therefore not including specific industry related critical safety controls.

+ A COLLABORATION WITH RISK MENTOR



■ INSIGHT

Risk Mentor is an experienced industry leader in creating tailored solutions for optimising operations.

Given the nuances of the industry, including a significant workforce spanning large geographical locations, PowerNet required a specialised team with experience in similar industries, and extensive experience in developing tailored tech solutions.

The team required a reimagining of what was possible with their approach to safety performance management, and it was unclear the exact approach and platform that would achieve the greatest impact.

Based on assistance and support provided since 2016, PowerNet sought design and delivery advice from Risk Mentor. Holding direct experience with dozens of companies addressing these exact problems, Risk Mentor was able to support the configuration of an Electricity Distribution Digital Solution, with a focus on frontline staff, the operational integration of critical controls and the unlocking of additional business benefits.

As a leading content, consulting and technology company, Risk Mentor (RM) applies engineering logic to validate, digitise, and operationally integrate work processes, based on good practice, operational know-how and experience.

The team at RM assists clients to innovate and outcompete by:

- Benchmarking current performance against industry validated good practice;
- Addressing gaps and operationally integrating enhancements;
- Co-creating workflows that capture information for ground-up innovation and performance improvement;
- Supporting decision makers at all levels with knowledge and reporting platforms.

The PowerNet Process

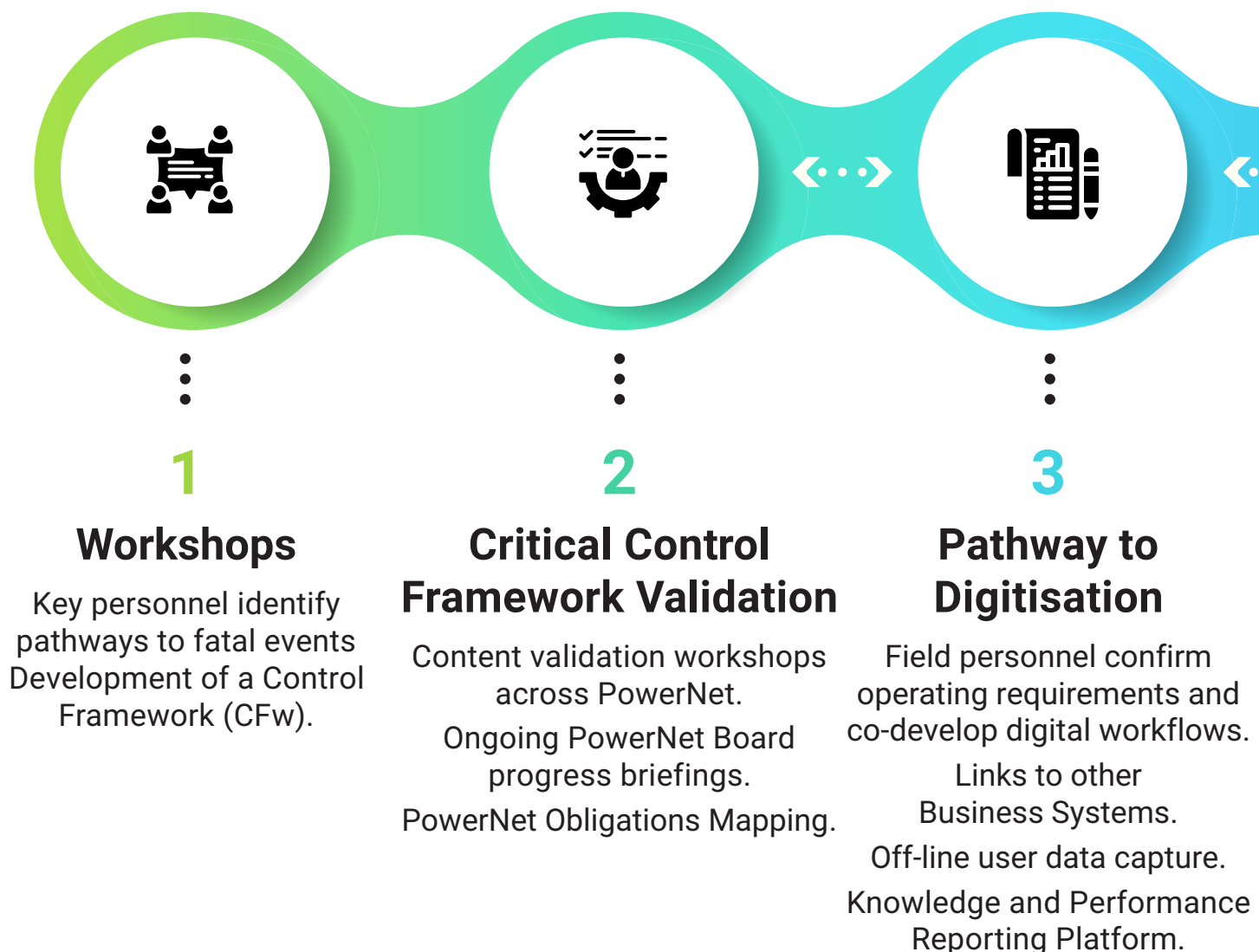
With a primary focus on field staff, Risk Mentor assisted PowerNet to develop and apply digital processes that have delivered step change improvements in safety and business performance.

FIGURE 1

The diagram below represents the PowerNet journey to establish a dynamic digital platform, harnessing the power of worker engagement to co-create powerful tools for analysing and optimising processes, from the frontline to the boardroom. PowerNet describe their approach as a Critical Control Framework (CCF), reflecting their initial focus and priority.

“The CCF is already significantly enhancing field teams’ engagement in workplace safety, reducing workplace injuries, and managing compliance. These are key performance indicators.”

Jason Franklin, PowerNet Chief Executive

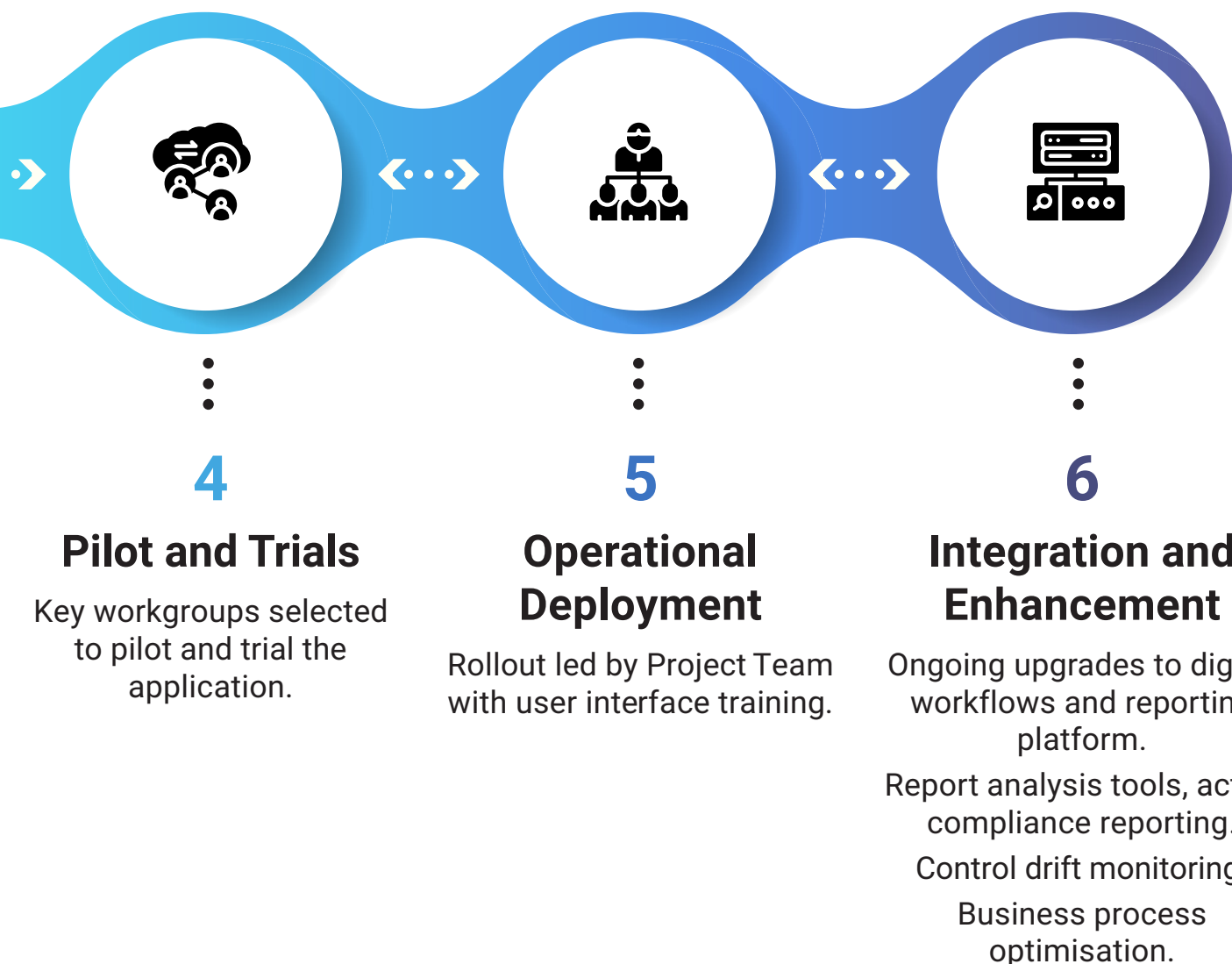




■ TAILORING

While the below process is specific to processes at PowerNet, Risk Mentor strategically applies the the Control Framework process specifically for the industry sector each client operates in, including linking with existing systems and processes and meeting company and regulatory outcomes.

The Control Framework architecture is flexible and adaptable. Each company and sector build is developed based on needs and priorities and continues to improve based on real-world experience and feedback.



6 Steps to Digital

Below is a more detailed summary of the digital evolution achieved at PowerNet.



STEP 1: WORKSHOPS

This innovative, **operationally focused co-design process**, involving experienced frontline workers from a range of workgroups and led by Risk Mentor advisors, identified Required Operating States (ROs), Credible Failure Modes (CFMs) and specific Business Inputs (BIs) to counter these. This process identified 13 activity types involving critical risks which could result in life changing incidents. This information became the foundation on which the **Industry Sector Control Framework (CFw)** was built and implemented.



STEP 2: CRITICAL CONTROL FRAMEWORK VALIDATION

The PowerNet **Critical Control Framework (CCF)*** was designed to provide targeted controls that address and mitigate against adverse events specific to the electricity distribution industry and its particular operational processes. A draft of the CCF was presented to all workgroups across PowerNet for validation. Each worker was asked to confirm that the CCF structure, logic and content made sense to them and that they were comfortable that, when implemented, the CCF would “stop something bad happening to me.” This conscious engagement with frontline workers gathered their **knowledge, insights, and experience**, which were integrated into the CCF.



STEP 3: PATHWAY TO DIGITISATION

The crux of a successful digitisation strategy is ensuring that data, controls and platforms are established to support and ensure the safety of workers in the field. With this in mind, PowerNet **consulted with frontline teams to develop digital workflows** for each of their work type activities, ensuring that controls for critical activities were captured. Worker engagement and feedback was sought at all points and re-integrated into both the CCF and upstream to the developing digital platform. At the same time, RM and PowerNet were linking the ROs, CFMs, and BIs identified in Step 1 to **PowerNet’s obligations (legislation, international standards, industry guides, etc.)**, along with PowerNet’s own standards, procedures, and forms. This approach links business activities and digital workflows directly to meeting compliance outcomes.

**Step 2 Note: The term Critical Control Framework is used by PowerNet leaders reflecting their primary focus while referencing the RM Digital Solution Control Framework Architecture.*

More effective controls enhance safety on the frontline.
More accurate data allows for more effective management and governance, reduced costs, and easier compliance.



STEP 4: PILOT AND TRIALS

Following the establishment of a viable CCF and the integration of crucial **worker experience into the digital platform**, a pilot digital platform was developed for launch to select workgroups over a two-month trial. The platform was made accessible in the field (via phones and tablets), and used the first set of digital workflows. These were based on company performance expectations and linked through to a **knowledge and reporting platform**. This trial demonstrated the power of integrating real data for active verification, enabling managerial teams to monitor work as it is occurring, alongside compliance obligations.



STEP 5: OPERATIONAL DEPLOYMENT

Successfully refined and trialled, the digital platform – using a tablet interface for field staff, a cloud based information management, reporting to a knowledge and performance platform – was **implemented at scale across the PowerNet workforce**. Grounded in real data and driven toward improving the safety of personnel, the CCF and resulting digital platform had immediate effect. Teams now undertake hazard and control reviews and assessments throughout their workday e.g. vehicle checks in the depot, operational inspections and confirmations, plant and equipment pre-use checks, work area inspections, tail gate talks etc. In a six-month period this **demonstrably reduced incident rates, and over a two-year period the company Total Recordable Injury Frequency Rate (TRIFR) reduced by over 80%**.



STEP 6: INTEGRATION AND ENHANCEMENT

After deploying **co-designed digital workflows and establishing information flows to a knowledge performance reporting platform**, PowerNet gained access to information that is used to assist decision makers at all levels. This information has improved business performance for:

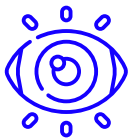
- Management of critical risks and their controls;
- Increasing employee engagement and feedback;
- Information capture, reporting, analysis, and archiving;
- Governance and assurance reporting and monitoring;
- Continuous improvement of business process design and deployment.

+ THE BENEFITS



A safe and productive working environment for staff

Since implementing the CCF (RM Digital Solution), PowerNet has already dramatically decreased injury rates by over 80% over a two-year period. The **digital, always accessible design** allows for offline use with retrospective syncing. This not only supports field personnel throughout their workdays, but provides process improvement feedback that continues to strengthen and reinforce safety controls from the ground up.



Easier tracking of areas for improvement

The CCF provides **effective verification of critical controls**, allowing managers to address gaps in performance and identify controls that require improvement in near to real time. The CCF's capability to record and store data brings greater transparency so managers can review safety checks and actions, making necessary changes before potential incidents occur.



Streamlined documentation and compliance

Digitised and linked task level information can be used to review process design and application, and for governance and assurance outcomes, e.g. the application of critical controls. The RM Digital Solution supplies **high quality, consistent information to support risk auditing processes**. It cross-checks operational activities in line with regulatory requirements to ensure these are being met.



A culture of proactive safety control

Aside from its practical applications in streamlining a job's workflow and clearly documenting critical safety aspects, the CCF contributes to greater awareness and engagement around workplace safety. It has created a mindset shift as teams move their thinking from **identifying risk to understanding the critical controls** required to manage it. While the initial drivers for this work were to improve health and safety performance, the CCF's implementation has sent ripples through the organisation — creating teams that are consistently looking for opportunities to improve processes across the board.

Creating a step change in company performance through a renewed emphasis on task level risk and control management

Working with Risk Mentor, PowerNet has successfully transitioned a core aspect of the business to unlock their digital future, creating changes that are already reverberating across the organisation's processes and culture.

For **field teams**, being supported by digital workflows assists with work planning, hazard management and task step execution. Introducing the capacity to self monitor and record that tasks are being completed to standard has delivered ground-up performance improvements.

For **line managers**, a digital knowledge and reporting platform assists with managing multiple teams and identifying improvement opportunities before incidents and other losses occur. The concise and contextual information recorded by field teams is used by supervisors to support field teams to consistently deliver safe and productive outcomes.

For **senior leaders and directors**, the knowledge and reporting platform provides performance information for analysis and the assurance that controls are in place and effective. Senior leader workflow observations focus on the consistent application of critical controls using structured questions to review field activities as part of PowerNet's governance and assurance processes.

Across the organisation, PowerNet is witnessing a positive shift in company culture. As PowerNet CEO Jason Franklin highlights, **'The CCF is unique because of its capability to systemise and bring consistency to workplace safety across our field teams and create a widespread impact on company operations.'**

While safer operations, with an initial focus on critical controls has been the driver for this digital change, the move to digitisation has delivered multiple other business benefits. As more organisations in power and natural resources consider when – and how – to begin transitioning toward a digital future, it's worth bearing in mind that small steps today can lead to great changes tomorrow; not only in worker safety, but in operational efficiency, compliance, worker morale, and company culture more broadly.

■ INSIGHT

A seismic shift is enabled by developing and updating digital workflows directly with the teams undertaking operational activities. This aligns confirmation of critical controls at appropriate times in the work task, not solely in the sequence in a procedure. Working this way gains field team buy-in from day one.

+ RESULTS AND STATISTICS

PowerNet applied the Control Framework architecture and the Risk Mentor platforms to configure and deploy a New Zealand electricity distribution sector Digital Solution.

Required Operating States

13

Aligned with company mission critical risks, and incident experience

Company and External Obligations

1,500+

Company and external requirements mapped and monitored

Business Inputs

150+

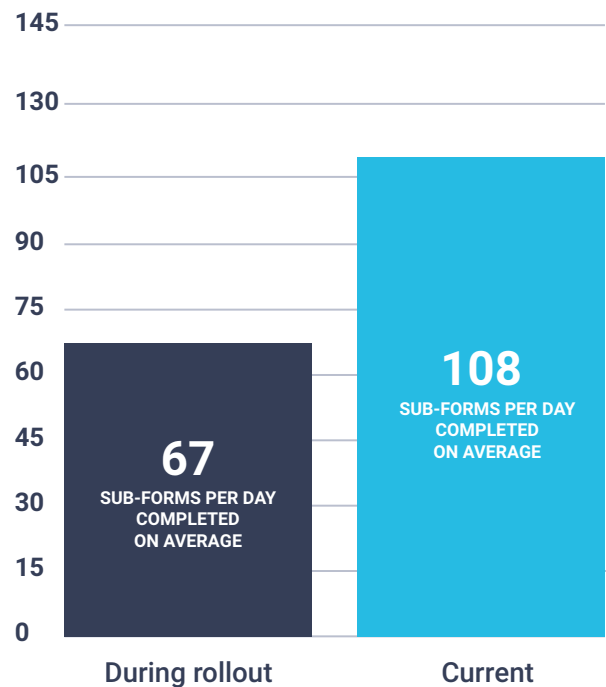
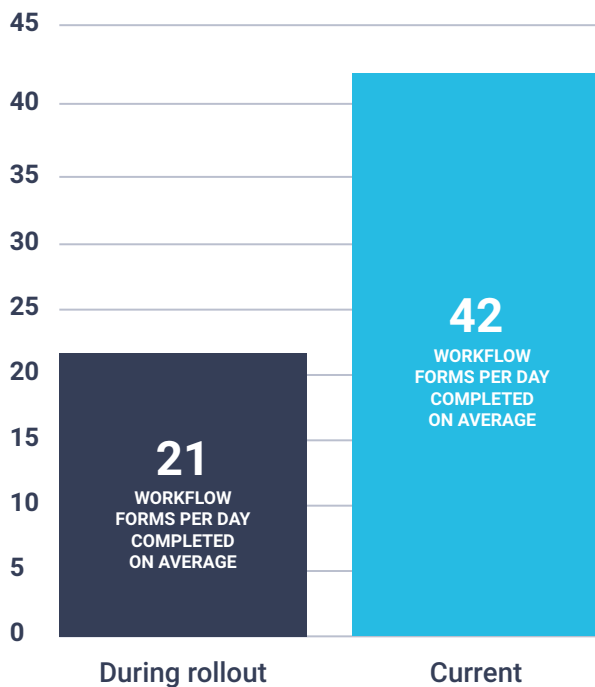
Required for safe and productive electrical power distribution

Digital Workflow Templates

45+

Developed, piloted, and implemented with sub-forms

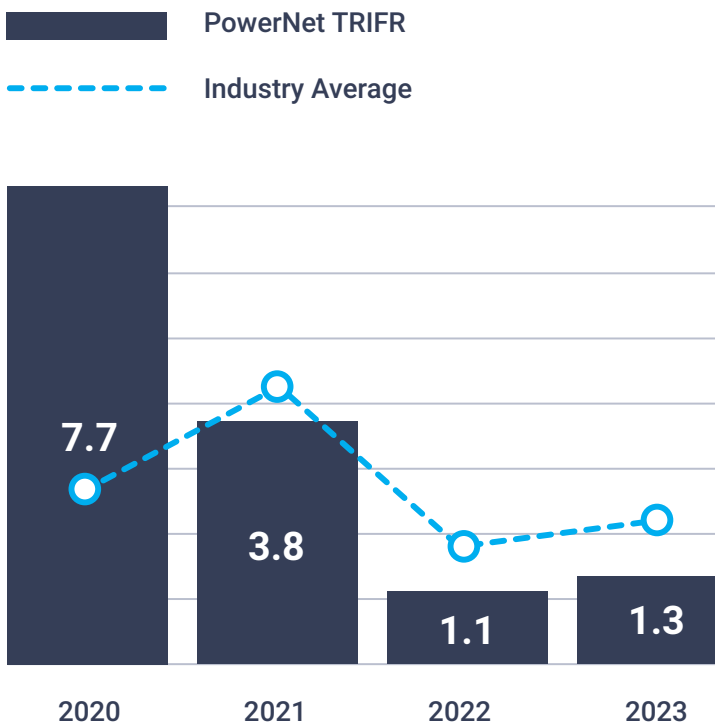
+ A SIGNIFICANT RISE IN WORKER ENGAGEMENT



An 80% sustained decrease following RM platform implementation

The Pilot Project was initiated in September 2020 engaging with four key field staff across a cross section of activities from faults, through to project work. This moved to a Trial Team Project with a larger user group of 15 key field staff by November 2020.

The full rollout occurred workgroup by workgroup and completed by July 2021.



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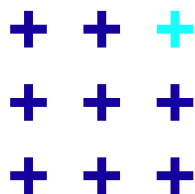
2.3 mil +

Confirmations, reported, logged,
and available for analysis

+ FINAL CONSIDERATIONS

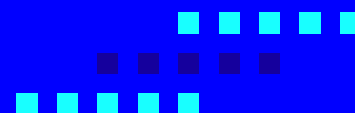
What becomes possible when:

- In the field decision makers have access to the right information?
- 'As it happens' data is collected as each task step is executed?
- Your workforce is fully engaged and provides constant feedback on how things are really working?
- Company systems and processes are de-cluttered, streamlined and fully integrated with how work is done?
- There is wisdom available for leaders at all levels, with operationally integrated monitoring, reporting, analysis, and improvement?
- Built-in compliance and assurance are integrated across operational practice?
- 'Work as Digitised' = 'Work as Done' = 'Work as Documented.'



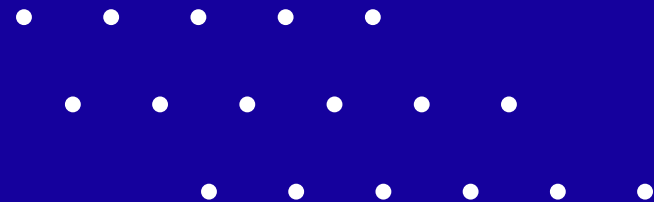
Our clients use Risk Mentor products and services to build and power their digital futures by:

- Working directly with frontline staff to co-design and configure operational workflows
- Providing task step information and references within operational workflows
- Mapping, logging, and updating the details of daily operational activities
- Capturing information-rich data and real-time reporting that supports decision makers at all levels
- Detecting and correcting early drift
- Establishing and maintaining agreed points of truth at a systems level
- Identifying work processes that require review, updating as necessary
- Supporting continual operational improvements based on analysis and data
- Delivering the business mission, while efficiently meeting all compliance outcomes.



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