



USE CASE

Louisiana Cat's journey to nation- leading TRIR

Caterpillar dealer leverages improved JSA coverage
for operational safety

2x

JSA coverage
to 95%

0.4

OSHA
incident rate

~400

technicians
using 15 forms

For a heavy equipment dealer like Louisiana Cat, job safety assessments (JSAs) are critical to ensuring the safety of its staff as they work on potentially hazardous assets.

With an average volume of 250 JSAs a day, the company recognized the urgent need to improve its EHS process in the shop and the field while collecting as much operational data as possible to power its safety culture.



The challenge

ISOLATED DIGITAL SOLUTION

While its move from paper to digital JSAs realized certain logistical benefits, Louisiana Cat's safety data from the field was stored in an isolated system that didn't interface with any of its other platforms.

LACK OF AUTOMATION

JSAs are a critical part of every technician workflow, with various triggers and dependencies. The Caterpillar dealer needed a way to direct technician workflows with specific focus on completing and submitting safety assessments.

LIMITED OPPORTUNITIES FOR SYSTEM GROWTH

With a large number of diverse subsidiaries providing construction, maintenance, and engineering solutions across electric, gas, and telecommunication industries, the company required a solution that could be scaled seamlessly across its six subsidiaries and easily adopted by employees and third-party contractors.

Solution

TrueContext worked with the customer team to develop a solution that would not only elevate the way they approached safety documentation and management in the field but also open doors for data consolidation across this specific practice within the organization. With a tight timeframe of six weeks to set up and deploy the system, the team rolled out the app to Louisiana Cat's close to 400 field technicians and shop leads to handle up to 15 different safety documents.

"It wouldn't have been possible without the high level of customer service that TrueContext delivered," Craig Fisher, Director of HSE, explained. "The implementation team met or exceeded all deadlines set, and they deserve all the praise for making it happen. What had previously taken six months in our old solution took TrueContext six weeks to deploy. They fully streamlined the design and rollout – and we did not hit any of the snags that we expected as we were planning it," he added.

Outcomes

▶ DOUBLED IN JSA COVERAGE

The form dispatch feature doubled JSA coverage and completion rates to over 95% in the shop and around 70% in the field, a significant leap from the previous in-field figure of 2%.

▶ DATA TRACEABILITY AND INTEGRATION OPPORTUNITY

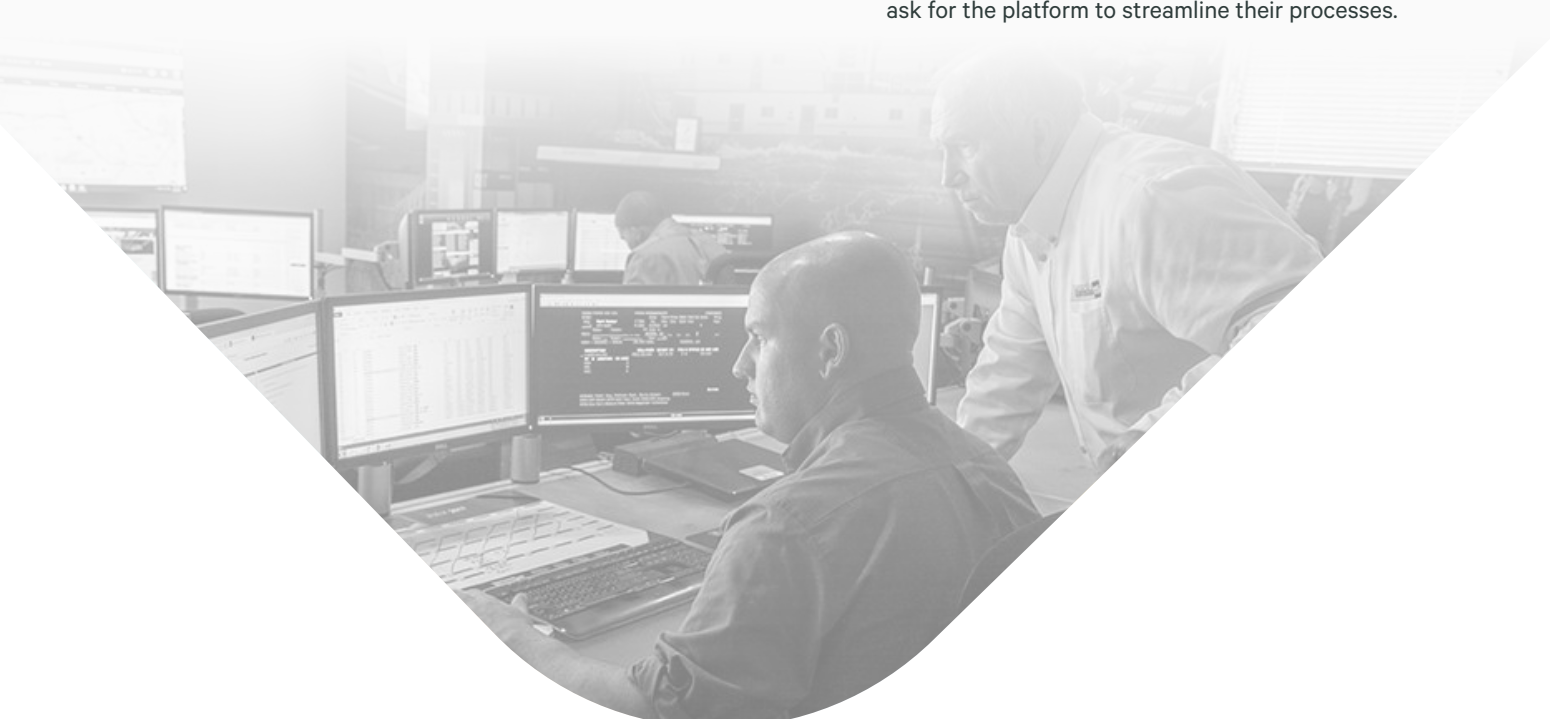
TrueContext lays the groundwork for future integrations with Salesforce to enable complete field traceability. JSAs could be exported into Salesforce containing GPS data from field vehicles and tied to the work order as well as the technician.

▶ IMPROVED TRI RATE

Currently, the customer's Total Recordable Incident (TRI) rate OSHA safety record is at 0.4, whereas the US average across all industries sits between 2.6 and 2.8. Not only has the number gone down, but also the severity of incidents that do happen.

▶ ENTREPRENEURIAL CULTURE FROM HIGH USER ADOPTION

The platform's ease of use enabled high organizational adoption, which has directly translated into more visible business impacts. This developed an entrepreneurial culture in the company as more teams ask for the platform to streamline their processes.



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