truecontext
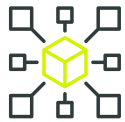
Global oil & gas leader fosters a culture of safety excellence

Integrating behavior-based safety practices
in an increasingly complex environment

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Safety is vital in any industry, even more so in the oil and gas sector. A global leader sought to amp up its compliance efforts, aiming to develop a robust, improvement-focused safety culture across its distributed operations. However, several factors complicated their behavior-based safety (BBS) efforts.

Challenges

FRAGMENTED SYSTEMS, PROCESSES, AND DATA

Disconnected legacy systems made it difficult for employees to understand their contributions to the bigger picture of safety, separating them from the process. This hindered their sense of ownership, proactive participation, and the full integration of behavior-based safety practices. Inconsistent processes added complexity, with workers often needing to document safety observations in separate, cumbersome systems.

OFFLINE FUNCTIONALITY

Limited internet connectivity at remote job sites could cause critical safety data to be lost, leading to potential safety hazards and compliance issues.

SAFETY REPORTING APP USABILITY

Multiple, non-user-friendly data collection apps made it difficult for employees to share safety observations or near-misses. This lack of easy reporting and integration discouraged employee engagement, hindering a culture where everyone felt empowered to champion and exercise safety.

Solution

TrueContext replaced the organization's complex and fragmented systems with user-friendly mobile forms that streamline the observation process. These forms dynamically adapt based on criteria like job site, department, and observation type, significantly reducing the time and effort required to document observations.

Observations are instantly pushed to integrated backend systems, ensuring crucial information is never lost or delayed. This immediate data integration also empowers frontline workers by giving them confidence that their observations are promptly received and addressed.

▶ **SHAREPOINT LIST**

The workflow begins with a SharePoint List, which is a repository of standardized safety questions and observation templates. This list is easy to update and manage.

▶ **UNSAFE SITUATION OBSERVED**

Workers can initiate an observation when they identify a potential safety hazard. Observations can be ad hoc or planned, often assigned to managers who observe the work environment.

▶ **SMART FORM ACCESS**

The worker opens an intuitive mobile form on their device. The form is designed for ease of use and accessibility.

▶ **PRE-POPULATED & DYNAMIC FIELDS**

The form automatically populates relevant fields and adjusts questions automatically. It can be customized to align with the company's safety requirements. Lists are filtered based on previously entered data, and the selected checklist drives the available observations.

▶ **OBSERVATION WRAP-UP**

The worker can add photos and free-text notes for each observation item, providing additional context and details.

▶ **FORM SUBMISSION**

Completed observations are transmitted to the backend for further processing and analysis.

▶ **REAL-TIME ALERTS**

Designated supervisors receive immediate notifications about the completed observations, allowing them to take prompt action if necessary.

▶ **DATA INTEGRATION**

The observation data is integrated with the company's backend systems, enabling in-depth analysis and insights.

▶ **DATA-DRIVEN INSIGHTS**

The observation data is analyzed to identify safety trends, patterns, and groupings. The specific criteria used for analysis and the types of insights generated depend on the user requirements and the reporting and analytics system in use.

▶ **FOLLOW-UP (OPTIONAL)**

While the BBS workflow itself does not manage or track follow-up actions, it can facilitate the dispatch of new records for future follow-up or update the status of existing records based on user requirements.

Outcomes

▶ **ENHANCED PRODUCTIVITY AND PARTICIPATION**

User-friendly tools, offline functionality, simplified reporting processes, and a single, integrated platform significantly boost employee productivity. This empowers workers to focus on core tasks while actively contributing to safety initiatives, leading to increased adoption and participation across the organization.

▶ **ELEVATED SAFETY PRACTICES & REDUCED REGULATORY RISK**

A proactive, data-driven approach to safety, combined with automated regulatory compliance tracking, creates a safer work environment. This minimizes risks, promotes a culture focused on a shared appreciation of safety, reduces the likelihood of non-compliance, and protects against potential fines.

▶ **IMPROVED CONNECTIVITY, EFFICIENCY, & DECISION-MAKING**

Streamlined workflows with centralized data enable a more stable, efficient field operation. Real-time access to insights and the ability to seamlessly integrate with existing safety platforms empower faster, more informed decision-making. This allows the company to adapt and improve its safety practices continuously.

Workflow Features

Forms
Intuitive, customizable forms tailored to specific oil & gas safety protocols and BBS observations.

Integrations
Seamless integration with existing safety platforms, regulatory databases, and training systems.

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