



8 Key Questions for
**Effectively Selecting
an EHS Management
System**

Change can be overwhelming. Many organizations look to move from old processes, outdated systems, and paper management, but it's not easy to get employees to adopt a new system.

While changing systems and processes can seem overwhelming, asking yourself certain questions can help you identify where your roadblocks might be and how change can benefit your organization.

We've compiled eight key questions to ask yourself and your organization when deciding on an EHS platform.

- 1. Are we ready to take this step?**
- 2. What challenges do we want the system to solve?**
- 3. What features are important to us?**
- 4. Who needs to be involved?**
- 5. Do we have leadership buy-in?**
- 6. What is our budget?**
- 7. Can we see some demos?**
- 8. What is our launch plan?**

1. Are we ready to take this step?

The first question to ask is if your organization is ready to implement an EHS management system solution. Many organizations are still using manual processes – paper forms, spreadsheets, email – to document and track safety information and not every company has the safety culture to make changes.

But if your company culture is open to change, and willing to work through potential growing pains, looking for an Environmental, Health, and Safety (EHS) management software vendor is a great step to take. How do you know if your organization is ready to make a change? Think about things like how many people manage your EHS information, or what kind of injury or illness data you currently have access to and what you'd like to see instead.

Also consider your workforce itself. Younger employees tend to be more technologically advanced, and likely more open to bringing on an advanced management system.

Embracing an EHS system can lead to enhanced safety practices, streamlined processes, improved compliance, and – ultimately – a safer and more efficient work environment.

If your organization isn't ready, that's fine. Change will come eventually, as necessary. But it doesn't hurt to start laying the groundwork now for a future transition to a digital platform.



2. What challenges do we want the system to solve?

Before thinking about potential vendors, you need to determine what you want from an EHS management system. Your team might be looking to address one specific area, or you may want a solution that tackles multiple pieces of the safety puzzle.

Here are a few common areas to consider:

- Incident reporting
- Workers' compensation
- Compliance obligations
- Audits, assessments, and inspections
- Employee safety training and professional development
- SDS management and chemical management
- ESG solutions



Remember, you don't have to fix all your organizational bottlenecks on the first go. You can always start small with one or two EHS solutions and expand as your team adjusts to the new platform. **Any good EHS vendor will offer their solutions as individual pieces so you can easily customize your experience and adapt your platform to fit your company's changing operational needs.**

Plus, your employees are much more likely to be receptive to a new platform — and a new way of doing things — if they are introduced to it more slowly. Starting with one solution will keep people from feeling overwhelmed and just might be the key to getting more end-user compliance.

No matter how many solutions you decide to start with, you should still see positive results. For instance, gathering information from multiple users and consolidating it in one location makes it easy to track, monitor, and evolve safety practices. Another benefit is that employees having safety information at their fingertips — on any device, in any location — means there is no excuse for them not being current on standards and regulations.

3. What features are important to us?

Aside from budgetary needs, the features of an EHS system are likely going to be the biggest differentiator when it comes to selecting your preferred vendor.

Some features to keep in mind when comparing vendors include:

Adaptable solutions: This option is especially important with industries that have very specific changing regulations and unique requirements.

Automated processes: Automation is key for simplifying processes and enhancing productivity. By taking over processes and large volumes of repetitive administration that can easily be automated, employees are free to tackle more complex tasks.

Support other systems: Most businesses use a mix of data management approaches to manage their information. Because of this, EHS software must be able to work with other platforms such as commonly available HR or financial software platforms, internally designed systems, and other commercial solutions an organization can acquire.

Ready to be deployed: Top EHS software usually comes with every tool you need to comply with environmental, health, and safety regulations. Regardless of how many bells and whistles a vendor offers, their platform should be usable on launch, without having to wait months on end to be fully functional.

Customizable options: Having out-of-the-box solutions is nice, but unique business requirements may require a custom solution. Vendors that offer the flexibility to build custom solutions will have a leg up over their competition.

Real-time data capabilities: Provide at-a-glance views of data as opposed to manually locating, compiling, and disseminating crucial safety metrics.

4. Who needs to be involved?

Before you make the decision to implement any new system within your organization, you must consult with people from every department that will either use the system or will be affected by the system. **Any EHS platform should be useful for more than just EHS professionals.**

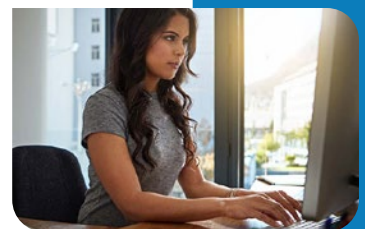
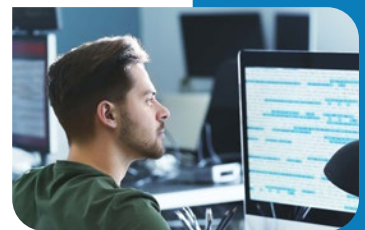
It is important to bring in the different departments early in the discussions so you can identify their needs and any concerns they have. This process will help as you move forward with vendor conversations.

For instance, IT departments should always be involved with new vendor purchases for numerous reasons, such as internal systems safety and making sure the vendor's software can coexist with your existing software.

Your HR team may also want to be involved in EHS system discussion. After all, they will likely be the ones managing time off requests, insurance, workers' compensation, corrective training, and other issues after an incident. Making it easy for them to access safety information on your new system would make that part of their job easier.

But beyond different departments, you should also consult with employees at all levels of the organization: Different levels of employees will likely use the system differently, but each one is just as important as the next.

Supervisors might use the platform at a high level to run reports, while team leads might assign daily tasks, complete safety inspections, or audits. Employees might document incidents at the jobsite.



5. Do we have leadership buy-in?

You will inevitably meet with leadership to approve any vendor purchase. At this point, you are probably excited about the idea of a software solution, but getting leadership buy-in takes more than excitement.

To best make your case, be prepared with:

A defined problem: Think about problems that have hard data you can use, such as incident rates, regulatory fines, workers' compensation claims, or time lost to injury and illness.

Highlighting less-tangible data, such as how much employee time is wasted on manual processes, can also be useful.

A clear direction – with options: Align EHS goals with business objectives. Don't tell your leaders what you are going to do. Give them options by highlighting different budget and solution levels, with the pros and cons of each.

Answers to expected questions: Be prepared to answer questions. Use the information gained from meeting with different teams to develop responses.

An executive champion: Identify a potential ally before a larger group meeting. Having someone already on your side may be crucial in helping communicate success stories and benchmarking.

In any meeting with leadership, you also must prove the value of the system you are recommending. Educate your executives on the ROI of an EHS system. Show how much time is wasted on day-to-day tasks such as entering data into spreadsheets or manually running reports.

Also discuss how eliminating these tasks will allow you to spend your time more productively on things like further developing your employees or creating strategic plans for improving performance.

If you include your leadership team in vendor discussions from the beginning and keep them involved throughout the process, at least at a high level, getting final approval might be easier.

Here is a survey finding from the GERI report:

46% of EHS professionals say achieving executive support for technology modernization is their top concern.

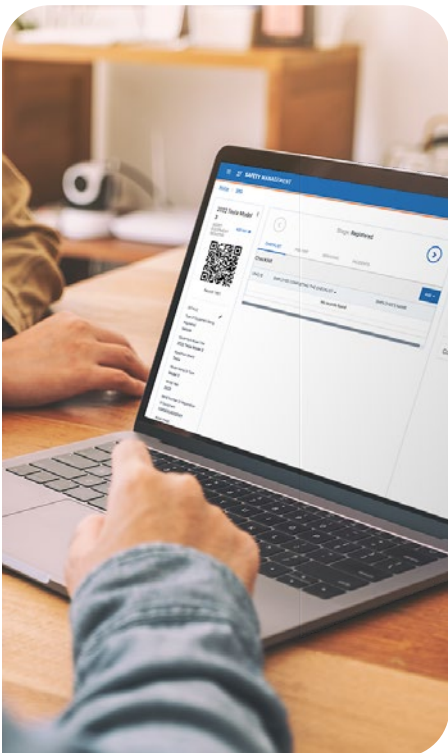
[2024 EHS Global Readiness Index Report](#)

6. What is our budget?

Budgets are always going to be a concern for the C-suite, but it can be tough to determine what the budget should be for a new software partner. You can develop a budget range by identifying the different EHS solution levels that would address your needs.

Determine your minimum requirements for how many solutions to implement, number of seats (or users) available, level of technical support offered, and so on. Then determine your ideal scenario for those same categories. Having a budget range might make it easier to sort through available options. It also shows your management team the different alternatives based on the level of service.

Keep in mind the cheapest solutions are not always the best option. They are usually cheaper for a reason. Instead, **focus more on cost versus value, not only about features you'll get with the system but also how you will save by implementing an EHS system.**



You might currently be spending hours or even days tracking down information, uploading it into your system, and sorting or presenting it in a usable way. A good management platform will do that for you instantly, saving you time and lowering your risk, while your company leverages real-time data to make informed decisions and save money.

Demonstrating savings from implementing a platform provides a comprehensive view of your potential ROI.

And if your budget dictates a scaled-down implementation to start, remember that, with a good vendor, you can always expand your solutions later. Sometimes it takes actual use to prove an application's value and need.

7. Can we see some demos?

When it comes to scheduling demos for EHS systems, you truly cannot have too many. Any potential vendor should be happy to walk you through a virtual tour of their platform and showcase any feature you want to see.

Don't be afraid to schedule multiple demos with the same vendor. As you narrow down your list of potential partners, scheduling new demos — and bringing in different team members to each demo — will help you get a better feel not only for the platform but the company itself.

Scheduling multiple demos also gives you the chance to ask more questions. You can be as prepared as possible going into an EHS demo, but inevitably you will come up with more questions afterwards. Setting up at least two demos with your platform finalists allows for a deeper dive into the system.

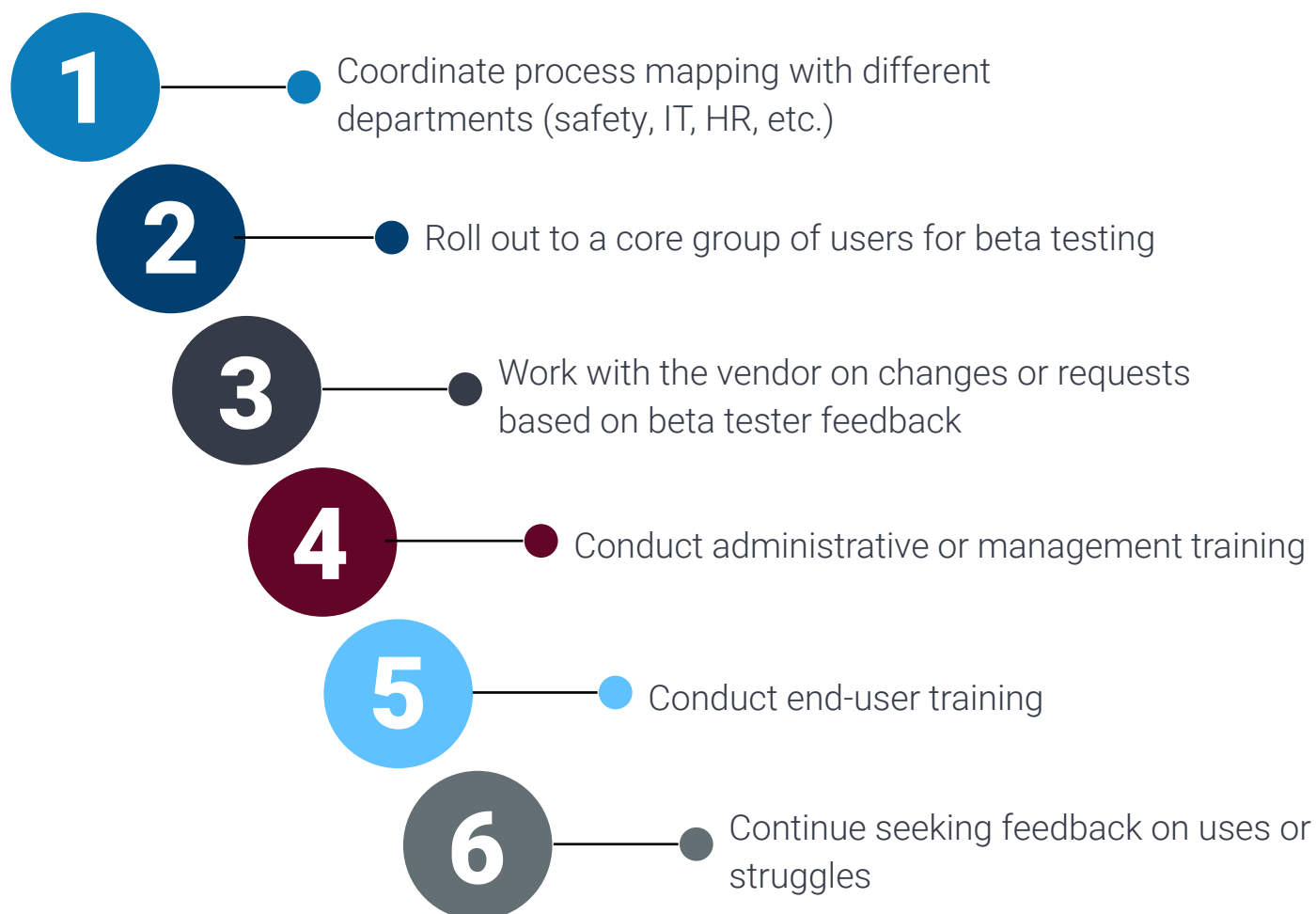
The best vendors will also allow you to access a sandbox version of their platform so you and your team can play around with the functionality on your own. Sometimes, a management system will look one way in a demo but be a completely different experience after purchasing. A sandbox trial will help you weed out companies with a strong, intuitive product during a sales pitch but one that falls short in real use cases.

Remember, you are not simply purchasing an software, you are creating a vendor partnership. You should be equally happy with the product and the organization behind it.

8. What is our launch plan?

This step tends to be overlooked but it is so important for any platform launch. You can't just sign a new contract and call it a day.

You should discuss an implementation timeline with any vendor you choose, but here is an idea of some of the different steps you may want to include within your launch plan:



Don't Worry if You Feel Overwhelmed

Our best advice when you are first implementing any software solution: Keep it simple. **Any good management system software vendor will make it easy to add new solutions or expand your user list as your needs change.**

For example, you want to start your focus on conducting regular audits and inspections, so you purchase those two functions to start. But after your employees get used to the platform, you may want to add incident reporting, vehicle management, implement OSHA recordkeeping, or use the system for document management.

Starting smaller is also a good idea if your leadership team is not sold on implementing a full-scale EHS system. Launching with one solution, or limited users, and letting the results speak for themselves makes it easier to make the case for expansion in the future.



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