

# HEALTH, SAFETY, ENVIRONMENT & YOUR CRM SYSTEM

**H**ealth, Safety, and Environment (HSE) is a critical component of your organization, agreed? With ineffective processes in place, even the most minor of incidents can bring operations to a grinding halt, which at times results in exponential losses with feelings of helplessness and frustration both in the field and back in the office.

Has your HSE division ever had paper forms lost or filled out incorrectly? Of course. This likely happens more than we'd like to admit. Let's face it, human error plays a costly role in manual processes. Not to mention the additional dilemmas of:

- Delayed response times
- Limited accountability
- Unmanaged escalation procedures
- Slow communication between HSE Managers, Site Owners, and Inspectors
- Ineffective tracking of employee training and certification
- Lack of centralized location for effective documentation of paper forms

...and the list goes on.



What in the world does CRM (Customer Relationship Management) have to do with HSE?

GREAT question!

A local company has leveraged the flexibility, features, and power of the Microsoft Dynamics CRM platform and built a brilliant QHSE software solution called iTrak that meets the above-mentioned chal-

## iTrak workflows are fully configurable to meet your organization's unique processes

lenges, streamlines workflow procedures, and more. It works like this:

Microsoft Dynamics CRM is a Customer Relationship Management system that, out of the box, focuses primarily on managing your organization's sales, service, and marketing functions. It's a robust system that is highly configurable and customizable to meet your organization's specific needs. It has

also met the mobility requirements many companies now demand, which allows real time access to data from your phone or tablet, as well as an offline mode when no internet connection is available.

As a platform, Microsoft Dynamics xRM (anything Relationship Management) works with applications built specifically to meet almost any business or organizational need. NeoSystems, a local Calgary company, harnessed their 15+ years of delivering health and safety solutions and built their most recent version of iTrak on the xRM platform. Built from the ground up, it delivers the game-changing feature of mobility, which is a critically important component for safety processes that originate in the field (such as inspections, hazard identifications, risk assessments, etc.)

With iTrak and its seamless integration with Microsoft Dynamics CRM, a whole new world of opportunities is opened up for your general workflows and QHSE operations. Keeping in line with the platform's inherent nature, iTrak workflows are fully configurable to meet your organization's unique processes. Meaning, you don't have to work around the system. It works with you. This means:





- Standardization of processes across divisions and subsidiary business units, which benefits the overall safety of the organization.
- The virtual elimination of paper forms (yes, it's true! It's no longer just a pipe dream).
- The ability to tag information gathered in the field with GPS coordinates to help you understand where information originated from.
- Accurate and timely tracking of workforce training and certification, including the specific training required for certain positions or job functions.
- Detailed incident reports show all events; who was involved, how it was corrected, etc., and all of this in a timely manner (you can only imagine what this does to help ensure accountability and promote safety).
- Root cause analysis takes on new meaning. Problems are reported early and efficiently with inspection forms that allow for pictures and detailed location pinpointing with the use of GPS technology.
- Forms are instantly sent to the appropriate managers, supervisors, and superintendents, which enables streamlined notification and escalation procedures.
- Field employees can instantly do their safety check-ins.
- You can move data to and from your QHSE processes to utilize charts, graphs, and interactive reporting elements empowering you with the insight you need to ensure issues and risks are identified quickly and easily.

The list can go on and on, but I think you've got the idea. I think the 3 key take-aways here are:

- Efficiency • Safety • Mobility

### NOW, LET'S GET INTO JUST A WEE BIT OF THE TECHNICAL STUFF (IN CASE IT ASKS):

- Both Microsoft Dynamics CRM and iTrak are available in Cloud or On-Premise.
- iTrak allows you to leverage CRM Essential Licenses. Mobility is enabled with no additional licensing.
- If you're already running Microsoft Dynamics CRM, the addition of iTrak doesn't require any technical intervention from your organization's IT department (do I hear cheering?).

Who do you contact? You can always contact me if you're considering implementing a CRM system or if you would like to revisit the one you have now that isn't quite being used as it should be. If you would like specific info on iTrak, check out [www.useitrak.com](http://www.useitrak.com).



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