

The InteleX Environmental, Health & Safety Blueprint


How to Drive Proactive Improvements
Across Your Business



Section 1: People, Planet, Profit

It's Time To Improve the Way We
Manage H&S and ESG





In our recent global research, over **75% of European organisations** said they could lose business to competitors who can better demonstrate how they're improving health and safety.

In North America, **86% of businesses** admit if they don't improve their health and safety culture, they'll lose skilled workers to better performing organisations.

And in both regions, around **75% of respondents** say that if they don't improve ESG performance, it will harm their organisations' brands and reputations.

It's clear: success in both H&S and ESG has a direct line to business performance.

The Benefits are Clear

Organisations that drive more effective programmes realise key benefits including:

- Healthier, safer, more productive workers who willingly contribute to H&S and ESG programmes.
- Compliance with international regulations ensuring they can compete effectively across borders.
- The ability to make more informed decisions about current and future activities.

That's just the start.

The Maturity Imperative

We know from speaking to business leaders worldwide that a high level of maturity in how they approach H&S and ESG can be a key competitive differentiator.

The question is: How do you move from a traditional, reactive approach to a more forward-thinking, proactive one?

In this guide, we'll help you assess the maturity of your current programmes. We'll present a framework you can use to organise your approach so that it aligns with your wider business objectives. We'll look at actionable steps you can take to increase your maturity over time.

Key Challenges for H&S and ESG Professionals Today

Our research showed a profession looking to evolve but facing some significant barriers:

49%



Almost half (49%) of European professionals find it difficult to extract meaningful data after an incident has occurred.

56%



This increases to 56% for their North American colleagues.



Over a third of ESG professionals in both Europe and North America struggle to gain employee support for their initiatives.




Less than half are 'very confident' in the accuracy of their ESG data.

To read the full European report, [click here](#) or scan the QR code below.



For the North American report, [click here](#) or scan the QR code below.





Section 2: Leader or Laggard?

How Mature Are Your H&S
and ESG Programmes?

Different organisations will be at varying levels of sophistication in how they approach H&S and ESG. Many will find they are more advanced in how they manage one over the other.

Some will be more reactive, dealing with incidents and events after the fact. Others will be making the move to greater proactivity, anticipating and preventing issues before they occur.

Ultimately, this maturity will greatly influence where they should focus their efforts.

In our research, we see four distinct maturity levels: **Leaders**, **Adopters**, **Followers** and **Laggards**. Each faces different challenges evolving and enhancing their operations.

To find out which group you fall into, take the maturity survey [here](#) or scan the QR code below.



Spotlight on Leaders

While Leaders face many of the same challenges as other organisations, they are significantly better able to fix problems and identify improvement opportunities.

They have robust, effective and actionable processes. They are also further ahead in moving to a more proactive approach, enabling them to anticipate and mitigate potential incidents and events.

Using advanced integrated systems, they have easy access to the up-to-date data they need for H&S management. An integrated management platform makes reports simple to create and easy to share.

Leaders in ESG understand how to achieve maximum impact from their initiatives and clearly track ROI. They use software designed specifically for managing even the most complex programmes, supporting multiple reporting frameworks and delivering a single source of truth.

Finally, they have strong partnerships between decision-makers and on-location workers that foster a culture of safety and environmental stewardship within the business.

It's a high bar to reach - and few do. However, those making this jump can reap the rewards of using their H&S and ESG maturity as a powerful competitive differentiator.





Spotlight on Adopters

Adopters have achieved significant advances in how they manage H&S and ESG. However, they realise they still have a way to go.

They track and deal with incidents and events quickly and effectively. But they may struggle to adopt more proactive approaches.

Their core H&S challenges often revolve around the cultural aspects of their programmes. They are often looking to get better at how they educate, coach and mentor workers. This is echoed for those reaching Adopter status in ESG. Here, issues will typically surface around employee action, education and support. They may also face challenges tracking and reporting their efforts.

Despite their increased use of technology, Adopters often experience ongoing issues in acquiring and managing the data they need. They will use purpose-built applications but may find it difficult to fully integrate them.

For Adopters, the focus is around enhancing their approach - they already have solid foundations to build upon.

Spotlight on Followers

Followers have typically made advances in a number of areas. However, they face significant challenges in others.

In both H&S and ESG, data reporting is often a significant issue. They struggle to harness the data they need to better understand what's really going on and how to tackle it. Measuring the effectiveness of their programmes is an ongoing challenge.

This is further complicated by the struggle to integrate disparate systems and software. Followers often use generic office applications, which typically leads to an ongoing battle to get what they need in the right format.

Specifically in ESG, Followers find it difficult to gain visibility of what's happening across the organisation.

They struggle to deliver actionable insights. This can have a significant impact on their ability to meet compliance regulations.

Spotlight on Laggards

Laggards face all the issues of their more advanced colleagues but to a far greater degree.

They find themselves endlessly reacting to incidents and events, always seemingly on the back foot. They're likely to need significant improvements in all areas of incident management. The systems they use often comprise a disparate mix of generic business applications which fail to provide the data they need.

Laggards find it difficult to gauge whether initiatives are successful or delivering ROI. Their performance blind spots make it almost impossible to build on what's working or correct what's not.

This lack of clarity and perspective leads to difficulty in engaging with others in the organisation. This poor communication is likely to be reflected in a lacklustre culture of safety and low levels of participation.

Finally, these businesses are at greater risk of failing to meet current and emerging regulatory responsibilities. They could face significant penalties as a result.

Evolving Your Approach

The good news is that whatever maturity level you find yourself in, the road to making improvements is clear and achievable.

In the following sections, we'll look at a framework for how you can break down your H&S and ESG initiatives. We'll then explore what you can do to improve the effectiveness of your programmes in each area.



Section 3: The H&S/ESG Process Blueprint

5 Areas of Focus for Improving
Your Operations





While every organisation will be at different levels of maturity – even between their H&S and ESG activities – we can split the process of improvement into five broad focus areas:

01. Identifying the key challenges your business faces

These may include:

- Capturing data on incidents and events in a timely manner
- Gaining access to the data you need
- Pinpointing regulatory non-compliance

If you are at the Laggard or Follower level, you'll need to pay particular attention to this first before moving on. Without being able to easily access the data you need, you will struggle to build capabilities in other areas.

02. Exploring the root causes and contributing factors

This may include:

- Being able to analyse and put data into context
- Investigating and tracking key workflows that may contribute to negative outcomes
- Fostering a culture of information sharing

Once you can reliably access the data you need, what can you do with it? This will be a focus for all maturity levels but is particularly important to Followers who often struggle in how they report issues to other stakeholders and senior management.

03. Targeting key interventions

This may include:

- The ability to prioritise your efforts and move from reactive to proactive activities
- Developing comprehensive processes for your programmes
- Driving employee participation, education and partnership

Your ability to target interventions will often depend on how well you can access and work with data. This is a critical factor as you move from reactive to proactive approaches. Doing so will be a particular area of focus for both Followers and Adopters. If you are a Follower, you are likely to be able to make educated assessments on where to prioritise. However, you may battle with your data sources, costing you time and money.

Adopters will be in a better position. If this is you, the focus will be how to translate programmes into enduring cultural change.



04. Measuring the impact of your efforts

This may include:

- Determining success metrics
- Harnessing both lagging and leading indicators
- Evaluating ROI

Tracking results and proving effectiveness will matter at all maturity levels.

If you're at the Laggard level, you may need to simply find a single metric or two you can track reliably.

If you are a Follower, you will be able to measure lagging indicators but may struggle to look forward in time.

And if you're an Adopter, you will have most of the core quantitative metrics but may need to explore ways of understanding the cultural impact of your programmes and how to take a more proactive approach.

05. Evolving and improving your approach over time

This may include:

- Capturing key learnings with quantitative and qualitative feedback
- Monitoring changing compliance regulations
- Continuously iterating and improving your approach

Whatever level you are, harnessing quantitative and qualitative feedback will be critical to increased maturity.

As you rise through the maturity levels, you will have more evidence for what to do next. You will also have more confidence that you can use this data to make better decisions about the future. This will help breed further success.

In the following sections, we'll look at each of these stages and the challenges organisations may face in both H&S and ESG. We'll outline actionable steps you can take to move things forward. We'll also provide links to key components of the Intellex platform that can help accelerate your journey.





Section 4:
Improving How You
Identify the Issues
That Really Matter

Key Challenges and How to Address Them

Every business is different. You may find your organisation further along its journey in H&S than ESG (or vice versa). So, you may have no difficulty capturing incident data in relation to worker accidents but struggle doing the same for the environmental impact of your various operations around the world.

This will mean you may need to focus your attention on different areas to help your organisation identify the major issues it faces. Use the following table to drill down into your specific challenges and get advice on how to make progress.

H&S	ESG	Key Challenges	How to Make Progress	How Intelx Can Help
<input type="checkbox"/>	<input type="checkbox"/>	Keeping up with key compliance and regulatory demands	<ul style="list-style-type: none"> Employ a holistic, data-driven approach to compliance tracking. This should span data collection, analysis, how you take decisions and how you translate these into actions. Utilise third-party regulatory compliance data to keep up to date with the latest changes, such as OSHA, CCOHH, HSE, EU-OSHA, EPA, ECCCC, EA, EEA, GRI, CDP, SASP, CSRD and other relevant needs. 	Intelx Compliance Center Intelx ACTS Intelx Corporate Reporting for ESG Datamaran ehsAI
<input type="checkbox"/>	<input type="checkbox"/>	Capturing the right data about incidents	<ul style="list-style-type: none"> Take a more proactive approach to frontline safety across field operations. This should include mobile-enabled incident and safety observations to make it easy for workers to contribute data. Develop an understanding of your ESG requirements. Expand competence in understanding incidents and potential impacts (eg near-miss reporting). 	Intelx Incident Management Intelx Mobile Intelx Observations and Feedback Intelx Corporate Reporting for ESG Datamaran
<input type="checkbox"/>	<input type="checkbox"/>	Harnessing inconsistent, hard-to-access data	<ul style="list-style-type: none"> Prioritise the digitisation of your H&S and ESG workflows that will yield the highest value/ROI. Build a comprehensive inventory of where data lives across your organisation. 	Intelx Risk Registry Intelx Aspects and Impacts Intelx Audits
<input type="checkbox"/>	<input type="checkbox"/>	Disjointed, inefficient processes	<ul style="list-style-type: none"> Streamline processes by capturing and documenting all relevant H&S and ESG process steps. Pinpoint areas for process optimisation. Identify an appropriate management system to consolidate data. Centralise data in a unified system of record. 	Intelx Corporate Reporting for ESG
<input type="checkbox"/>	<input type="checkbox"/>	Slow manual/paper-based processes	<ul style="list-style-type: none"> Move from ad-hoc to systematic reporting. Streamline this for visibility and ease-of-use across the organisation. Distil insights from data and make these available on demand. 	Intelx Advanced Analytics Intelx APIs Intelx Corporate Reporting for ESG
<input type="checkbox"/>	<input type="checkbox"/>	Reporting on incidents to senior management	<ul style="list-style-type: none"> Combine data from multiple sources to generate valuable new insights. 	Intelx Incident Management
<input type="checkbox"/>	<input type="checkbox"/>	Visibility across all organisational processes	<ul style="list-style-type: none"> Employ a holistic, data-driven approach to compliance tracking. This should span data collection, analysis, how you take decisions and how you translate these into actions. Utilise third-party regulatory compliance data to keep up to date with the latest changes. 	Intelx Advanced Analytics Intelx APIs
<input type="checkbox"/>	<input type="checkbox"/>	Dealing with resource challenges and constraints	<ul style="list-style-type: none"> Use technology to drive efficiency/productivity within your existing workforce. 	Intelx ROI Toolkit



A Case in Point

Based in London, Cory moves recyclable and non-recyclable waste for the City of London along the River Thames and uses waste to generate electric power. The organisation needed clarity and visibility on what was going on in their frontline operations. Implementing Intelx’s ESG software for environment and sustainability, Safety Observations Management software, Incident Management software and Job Safety Analysis software, the business increased its ability to analyse incident data, understand what has happened and why and address underlying issues in real time.



Read the full case study [here](#) or scan the QR code on the right.

A technician in a grey shirt and yellow safety vest is shown in profile, interacting with a control panel. He is holding a tablet in his left hand and pointing with his right hand at a control knob on the panel. The panel features a red emergency stop button and several indicator lights. The background shows a teal-colored piece of equipment with the word 'GENB' visible. A large blue circular graphic is overlaid on the left side of the image, containing the chapter title and subtitle.

Chapter 5: Identifying Root Causes and Contributing Factors

How to Get to the Core of Key Issues

It's one thing to identify the challenges you face, it's another to understand the likely causes and contributing factors. Again, you may be at different levels for H&S than for ESG.

Use the following table to see where you may be struggling and get advice on how to move forward.

H&S	ESG	Key Challenges	How to Make Progress	How Intellex Can Help
<input type="checkbox"/>	<input type="checkbox"/>	Tracking incident data over time to assess programme health and effectiveness	<ul style="list-style-type: none"> Enable management to access incident reporting tools. 	Incident Management Intellex CAPA Intellex Action Plans
<input type="checkbox"/>	<input type="checkbox"/>	Connecting disparate data to help spot patterns and develop more proactive approaches	<ul style="list-style-type: none"> Deploy an integrated management system of record to consolidate data. Integrate with adjacent systems of record (eg HRMS) to build a more comprehensive dataset. Build an inventory of requirements and flag appropriate data sources across your organisation. Use an instrument management system to collect data for each safety requirement. 	Intellex Platform
<input type="checkbox"/>	<input type="checkbox"/>	Difficulty capturing relevant programme data	<ul style="list-style-type: none"> Enable frontline workers to access tools allowing them to integrate observational behaviour into their day-to-day workflows. 	Intellex Safety Observations
<input type="checkbox"/>	<input type="checkbox"/>	Performing structured, non-biased root cause analysis	<ul style="list-style-type: none"> Consider purpose-built tools and workflows for building out a structured RCA framework. Develop a robust RCA training programme for lead investigators. Develop a risk registry to capture a holistic picture of risk. 	Intellex Root Cause Analysis Intellex Incident Management Intellex Risk Registry

A Case in Point

SUEZ North America operates water utilities to municipalities in the United States and Canada. They needed to be able to capture, report, analyse and correct hazards across a number of facilities. Paper spreadsheets were becoming simply too cumbersome. With Intellex's EHS Incident Reporting and Management software, SUEZ can now use root cause analysis and observations to determine the severity of incidents. Dashboards and automatic reports provide managers and senior leaders with valuable insight into incidents.

Read the full case study [here](#) or scan the QR code on the right.



Section 6: Targeting Key Interventions

How to Make Meaningful Changes



You know the issues and causes, now you need to focus on potential remedies and how to shift from a reactive to a proactive approach.

Use the following table to explore how you can make significant improvements.


H&S	ESG	Key Challenges	How to Make Progress	How Intelix Can Help
<input type="checkbox"/>	<input type="checkbox"/>	Prioritising potential programmes and initiatives	<ul style="list-style-type: none"> Rank outcomes in order of priority and impact to your organisation's overall strategy. Explore ways to obtain the ROI of specific H&S and ESG improvements. Build partnerships with key stakeholders to uncover what matters most to them. 	Intelix Enterprise Risk Register Intelix Business Intelligence and Analytics
<input type="checkbox"/>	<input type="checkbox"/>	Determining what to measure to demonstrate results	<ul style="list-style-type: none"> Identify key areas to optimise across your H&S and ESG programmes and the KPIs you'll use to measure results and impact. 	Intelix Corporate Reporting for ESG
<input type="checkbox"/>	<input type="checkbox"/>	Implementing a culture of safety/ESG responsibility	<ul style="list-style-type: none"> Build awareness of your programmes throughout the organisation and show how they will drive improved outcomes. Foster a culture of bi-directional communication between all levels, from frontline workers to management to executive leadership. 	Intelix Training Management
<input type="checkbox"/>	<input type="checkbox"/>	Communicating H&S and ESG efforts throughout the organisation	<ul style="list-style-type: none"> Build a communication framework that includes data-driven insights. Implement a regular cadence to review efforts and gather feedback from stakeholders. 	Intelix Meetings Management Intelix Corporate Reporting for ESG
<input type="checkbox"/>	<input type="checkbox"/>	Obtaining buy in from adjacent cross-functional stakeholders	<ul style="list-style-type: none"> Use data and visualisation tools to illustrate the impact of potential programme changes. Get input early and often. Uncover opportunities for mutual benefit. 	Intelix Business Intelligence and Analytics Intelix Nonconformance Reporting

A Case in Point

SGS is a leading global company for product testing, inspection and certification. It has a unique set of requirements and needed a solution that would enable it to customise applications. The business implemented Intelix App Builder to create apps for its employees, including incident management, near-miss management, permit to work and audits management. This has led to significant improvements in LTIR (lost time incident rate) and TRIR (total recordable incident rate).

Read the full case study [here](#) or scan the QR code on the right.



Section 7: Measuring Effectiveness

How to Know if You're On Track

With any H&S or ESG programme, you need to be able to measure what's working and what's not.

Use the following table to ensure you can measure what matters.


H&S	ESG	Key Challenges	How to Make Progress	How Intelx Can Help
<input type="checkbox"/>	<input type="checkbox"/>	Establishing meaningful improvement metrics for your programmes	<ul style="list-style-type: none"> Establish KPIs and benchmarks aligned with your H&S and ESG outcomes. Use a system of record to develop benchmarks and track progress. 	Intelx Business Intelligence and Analytics Intelx Corporate Reporting for ESG
<input type="checkbox"/>	<input type="checkbox"/>	Understanding the ROI of your initiatives	<ul style="list-style-type: none"> Build a framework for calculating value (eg efficiencies/cost savings, incident avoidance etc) across specific operational areas. 	Intelx Business Intelligence and Analytics
<input type="checkbox"/>	<input type="checkbox"/>	Understanding potential costs/penalties of poor performance	<ul style="list-style-type: none"> Develop a forecasting capability to identify potential costs. 	Intelx Business Intelligence and Analytics Intelx Claims Management
<input type="checkbox"/>	<input type="checkbox"/>	Creating meaningful reports that capture continuous improvement	<ul style="list-style-type: none"> Create structured reporting aligned with key H&S and ESG workflows. 	Intelx APIs Intelx Business Intelligence and Analytics Intelx Data Service
<input type="checkbox"/>	<input type="checkbox"/>	Communicating impact across the wider organisation	<ul style="list-style-type: none"> Tailor reporting to specific improvement programmes. 	Intelx Action Plan Management

A Case in Point

Fortive is a global company with specialties across healthcare solutions, intelligent operating systems, industrial safety and environmental products. The sustainability team were struggling turning data into actionable information. To fix this, they implemented Intelx Sustainability Performance Indicators to deliver a single source of truth and EHS&S Risk Score to conduct risk score assessment, analyse trends and easily report on risks across the organisation.

Read the full case study [here](#) or scan the QR code below.





Section 8: Evolving Your Approach

How to Continuously Improve Your Programmes



No programme is ever truly finished, there are always new challenges, new regulations and new opportunities to improve.

Use the following table to make sure you're able to continuously evolve your approach.

H&S	ESG	Key Challenges	How to Make Progress	How Intelex Can Help
<input type="checkbox"/>	<input type="checkbox"/>	Gaining quantitative and qualitative feedback on your programmes	<ul style="list-style-type: none"> Develop and deploy a regular feedback survey 	Intelex Business Intelligence and Analytics Intelex Bulletins
<input type="checkbox"/>	<input type="checkbox"/>	Surfacing opportunities for improvement	<ul style="list-style-type: none"> Add digital feedback tools to your current programmes. 	Intelex Mobile Intelex APIs
<input type="checkbox"/>	<input type="checkbox"/>	Communicating ongoing programme changes throughout the organisation	<ul style="list-style-type: none"> Use a range of communication methods to improve the accessibility and availability of information. Expand the use of mobile communications and microlearning. 	Intelex Bulletins Intelex Training Management
<input type="checkbox"/>	<input type="checkbox"/>	Maintaining momentum and engagement	<ul style="list-style-type: none"> Develop a programme of regular engagement with frontline employees using both synchronous and asynchronous channels. 	Intelex Mobile Intelex Bulletins Intelex APIs
<input type="checkbox"/>	<input type="checkbox"/>	Integrating learnings into your programme(s)	<ul style="list-style-type: none"> Develop a quarterly programme review to highlight key opportunities and learnings. Develop reporting. 	Intelex Business Intelligence and Analytics Intelex Training Management

A Case in Point

Global airline Virgin Atlantic Airways has always been serious about safety. However, the upheavals of 2021 led the business to realise it needed a more robust, simple-yet-smart technology that would help it achieve its safety management goals. Using the Intelex system, the airline evolved its approach, gaining a single source of truth with off-the-shelf functionality as well as customisation capabilities to meet its specific needs.

Read the full case study [here](#) or scan the QR code below.





Section 9:
**Greater Maturity,
Bigger Impact**

It's Time to Evolve How You Approach H&S and ESG

It has never been more important to ensure your business is making progress on delivering improved H&S and ESG outcomes. To do so, you will need to move from traditional reactive approaches to more proactive programmes. This will help deliver a step-change in how you keep your people safe and protect the planet from harm.

Today, everyone in H&S and ESG should be asking themselves some key questions:

- Can we effectively manage incidents and events from start to finish?
- Better still, are we able to spot, record and learn from near misses and other concerns?
- Can we harness data from disparate sources to deliver the proactive insights we need to move forward with confidence?
- Are we able to drive employee participation, partnering with them to make what we do part of the wider business culture?
- Can we implement technology to streamline how we work and help deliver results?

Change is complex but within reach

Of course, making progress across multiple areas can be complex. It can be difficult accessing the data you need. Getting your people on board is an ongoing challenge. And measuring results can be hard.

The good news is that whatever the maturity of your operations, it is possible to make significant improvements. With the right data, the right systems and the right focus, you can quickly improve across the board.



Let's Talk

We would love to talk to you about how Intelex can help you on your journey and show how businesses like yours have already seen success.

To begin a conversation, contact us at intelex@intelex.com and we'll arrange a convenient time to talk. Alternatively, you can learn more about us at [intelex.com](https://www.intelex.com) and on [our LinkedIn page](#).

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The Intelex logo is positioned in the top right corner of the page. It consists of the word "INTELEX" in a bold, white, sans-serif font, followed by a stylized graphic element of three parallel diagonal lines. The background of the entire page is a photograph of numerous blue metal drums stacked on wooden pallets in a warehouse setting. A large, semi-transparent red circle is overlaid on the left side of the image, partially covering the drums and the text area.

About InteleX

For over 30 years, InteleX has been making a difference in the world by helping our 1,400 customers achieve safer, more sustainable operations. Our web and mobile solutions streamline and simplify environmental, safety, quality and risk management, empowering organizations to meet the challenges of an increasingly complex marketplace while minimizing negative social, environmental and human impacts. InteleX is proud to be an operating company of Fortive Corporation, which provides strength in numbers, strength in skills and perspectives and strength in our shared conviction to make an impact.

For more information about InteleX, visit www.inteleX.com