# CASE EXAMPLE:

## Digital Permit-to-Work Platform Deployment

2021-2023

## IDENTIFY THE PROBLEM

The client endeavoured to digitize their permitting process following safety incidents which had a high potential for serious injury.

Following a platform selection process, our team was engaged to assist in the deployment of the platform to the end-users.

With a software platform being used to interpret policies and procedures related to safety and thereby informing the workforce through the output of permits, it was imperative to study and extensively test the effectiveness of the outputs for accuracy.

With some users having limited confidence in their skills on computers, it was equally important that the platform was simplified to the best extent possible and be ready to use for the existing templated permits already in use.

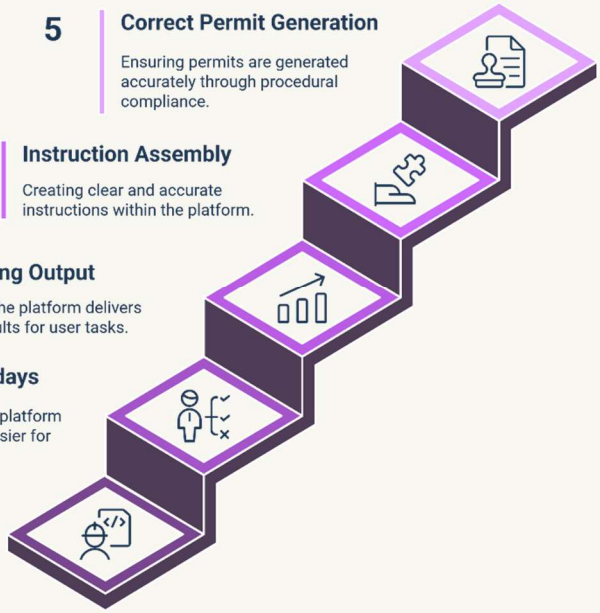
## RESISTING FACTORS

| | |
|---|---|
| Cultural Misconception | Misbelief about the effectiveness of permits. |
| Challenges due to varying computer proficiency levels. | Computer Skills |
| Deployment Scope | Extended execution time affecting project momentum. |
| Reliance on contracted workers' knowledge of safety standards. | Workforce Trust |
| Budget Constraints | Lack of funds to increase workforce size. |

Maroma Consulting Inc. focusses on operational success of businesses. Whether Asset Management, Project Execution, or Change Management, we have a team of resources with hands-on experience and proven results, ready to help

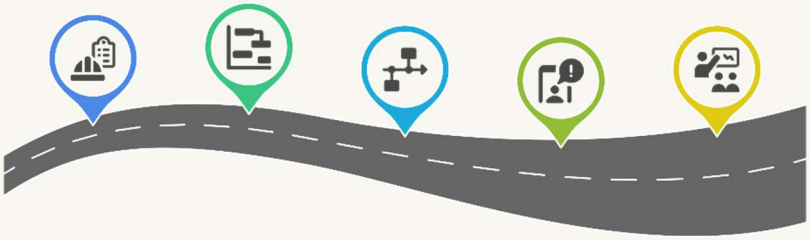
## APPROACH

We focused on user experience and adoption. It was clear that end-users needed to understand that The platform was going to simplify their day and, more importantly, ensure the output from the platform would improve the instruction to the workers. Ensuring proper assembly of instruction behind-the-scenes of the platform was a core focus to ensure permits would be generated with the correct application of existing procedural requirements.




## METHODS

- Perform an analysis of the core work categories which drive specific hazard-mitigating controls.
- Build a hazard and control map to connect similar mitigating controls with related hazards or work categories within the platform.
- Test & confirm functionality by replicating existing permits within the platform, and following the stepwise method presented by the platform.
- Advise the Steering Committee of findings and provide an options overview when decisions needed to be rendered to progress the project.
- Identify and engage “Early Adopters” to test and provide feedback on the platform functionality and accuracy.
- Identify existing permits which could be templated, create templates and engage with delegates to review and provide approval.
- Establish the training requirements and work with the training team from the vendor to prepare for roll-out of the platform to the site.



- Devise Key Performance Indicators to monitor adoption and identify user-support needs.
- Develop and deliver a handover plan to the owner team and support the new system owner.

## OUTCOMES

Our team helped deliver a comprehensive digital permit system, tailored for the policies and procedures of the organization.

Over 100 employees were trained on the platform in comprehensive two-and-a-half day training sessions.

The implementation team spent 4 months providing field support to all users; monitoring usage with the KPIs established prior to launch.

We provided insights to management stakeholders as well as insights and field auditing tools to support consistent evaluation of the usage of the permits being issued.

With feedback from the end-users, we developed and delivered over 150 templated permits for use on regularly executed work within the facility.

By working through adoption challenges, the team was able to achieve 100% adoption of the platform for all safety instructions to contracted workforce. High-risk permits were in adoption progress at the time of handover by the ownership team. Templated high-risk permits were in use, and the team was working through the implementation of a permit office to facilitate issuance of the permits required.