

## FLOWSTUDY

# Site Safety Solution Kickstarts Digital Transformation



*A complex Health and Safety Behavioral Observation process piloted by Irish building firm, PJ Hegarty was so successful that it triggered widespread adoption of FlowForma Process Automation.*

### The Challenge

With over 95 years in business, PJ Hegarty is a leader in large-scale construction with an annual turnover above €500 million and over 450 people directly employed. The secret of its longevity is that it's one of Ireland's most progressive building companies, never satisfied with the accepted way of doing things if improvements can be made. PJ Hegarty strives to improve health and safety performance in ever-changing and challenging environments. Their employees fully support their strong safety culture in the company and throughout projects. They believe there is always capacity and motivation for continual improvement.

A case in point was the Safety Behavior Observation (SBO) process.

The SBO program focuses on finding the root cause of behavior by anchoring safe behavior and coaching unsafe behavior through positive communication. It is solely associated with personal interaction and engagement by the project management team. It was identified that to change and instill a positive safety culture, the PJ Hegarty team was the core of that cultural influence, and this is where they would focus their attention, which would naturally feed into the supply chain.

### FlowStudy Summary

#### Processes

- Safety Behavior Observation
- Plant Process
- Permit Process

#### Pain Points

- Undigitalized Health and Safety behavioral observation process becomes administrative heavy
- Process exacerbated by excessive paperwork
- Administrative time in inputting data to an Excel spread sheet
- Inconsistent data and reporting
- Lack of real-time insight, delayed response times on trends
- The process could only look at data relating to each individual project

#### Benefits

- Safety incidents further reduced
- Administration time cut by 25%
- 40% increase in participation
- Observation data increased by 45%
- Improved employee experiences due to ease ability using the platform

#### Next Steps

50+ processes are being digitalized with many more planned.

The main aim was not to introduce negativity around the program by creating a stigma around dealing with unsafe acts. There are many such programs in the industry that have negative aspects. PJ Hegarty researched these and looked only at the pros. From this, they designed their own unique program with no negative aspects.

When first introduced in 2017, the program was paper-based. Site Managers captured information on SBO cards, which were then handed over to the EHS team for entry into Excel spreadsheets.

Information was then input into a basic Excel spreadsheet during the pilot stage. The benefits could be seen immediately. As the SBO numbers grew, they quickly needed a better solution. In 2019, an Excel-based dashboard was created. This turned around graphical information instantly. However, the data was still manually logged onto the dashboard by EHS members who spent hours at a computer.

The data and information were project-based, making sharing difficult in a real, meaningful time frame. This also didn't allow them to look at the information globally due to the level of administrative labor involved.

Document management tools were looked at as alternatives, but they could only digitalize parts of the process and still required significant manual input. Building a custom system was ruled out because it would be expensive and time-consuming.

This restriction prompted the search for a better solution. It was evident that a digital process was needed to take the SBO Program to the next level and allow the team to explore its full potential. The next step was to map out an ideal workflow and find a tool to digitalize the process.

PJ Hegarty began researching the market for a digital transformation tool and found the perfect match for their project with FlowForma.

*"We were trying to find a solution to digitalize because it was very time-consuming to input all the data manually for each observation – it was taking about three hours for one person each week,"* recalled Sinead Gaines, EHS Manager. *"FlowForma was the only application that could do what we asked it to do without changing the process."*

## PJ Hegarty Outcomes with FlowForma



**40%**

Increase in  
Observation  
Data



**25%**

Reduction in  
Administration  
Time



**45%**

Increase in  
Data Input



## The Solution

The EHS Manager began by creating a proof-of-concept with FlowForma, using its mobile app to share SBO results quickly and in real-time with the project team. The pilot showed them how to align workflows with the company's multifactor authentication protocols and introduced Microsoft SharePoint Online.

PJ Hegarty worked closely with FlowForma on upskilling employees to make the most of the tool. The first step was to train the project team to use the phone app and the QR code that allowed them to raise SBOs. Usage was monitored from the outset, tracking the number of generated SBOs daily, and employee feedback was encouraged to drive continuous improvement. Reporting of the data contained in the workflow was also identified as important. [FlowForma's built-in analytics capability](#) can facilitate this and allow analysis and data insights to be shared.

Next, a 'live' project was needed as a proof-of-concept, and a new-build commercial office project was chosen. The key objectives of the pilot were to reduce the administration burden on the EHS team, remove paperwork from the process to make it more sustainable, and gather and share SBO information in real-time.

The IT team then created a dedicated test area in SharePoint to evaluate new workflows without affecting existing applications. Such thoroughness and careful preparation paid off, with the company using FlowForma Process Automation in **over 50 processes across wide-ranging projects.**

Anthony Condon, Digital Manager, puts the fast pace of adoption down to FlowForma empowering employees to digitalize processes in the way they wanted. *"When we decided to deploy a new digital solution and wanted to make adoption as easy as possible, we needed a solution that meant we didn't have to change our processes to suit the solution,"* he explained. *"We understood that moving people from a paper-based process was change enough; it may have been too difficult for staff to adopt a completely new process."*

## The Outcome

Results from the pilot project highlight the difference that FlowForma Process Automation can make: **incident rates have been reduced**, and the EHS team's **administration time on SBO was cut by 25%**. The number of SBOs **input increased by 45%** from 2022 to 2023, and statistics show a direct correlation between SBOs and a reduction in incident rates. **EHS observation data has increased by 40%** since converting to FlowForma.



The major benefit is a **significant improvement in the EHS team's productivity** and their ability to proactively monitor trends, communicate with project teams, create action plans to reduce risk and help identify specific project needs and training requirements. Automated monitoring provides immediate insights into unsafe behaviors, enabling timely intervention to prevent potential accidents or hazards. Information can also be looked at across all of the projects, and they now have an overview of the entire business.

Ease-of-use has been key to FlowForma's wider adoption in the company, according to Sinead Gaines. *"The EHS team had the first process within three days, and once they got it and realized what it could do, they just got hungry for it,"* she said. *"They were coming to us with processes – not just from safety but from procurement and requisitions and everything."*

There has been a significant increase in the quantity and quality of information gathered and shared in real-time over mobile devices. A dedicated SBO dashboard allows any stakeholder to gain insights into their projects and benchmark risk across the global organization. Automation in data analysis provides real-time insights into safety behavior performance that enables project managers to quickly make informed decisions.

Brian Mooney, Director at PJ Hegarty, sums up the benefits to the business. *"Staff are happy with its user-friendly application, and our project managers like the real-time information dashboards available daily,"* he said. *"We have accessible information to engage with safety at daily meetings relevant to the site activities. It has reduced our EHS staff's administrative time, allowing them more time on site."*

## About FlowForma

FlowForma is globally recognized as the leading no code Digital Process Automation provider. The company is committed to empowering businesspeople to rapidly digitalize a wide range of processes in-house, without writing any software code.

FlowForma customers are live with digital processes, empowered and self-sufficient within 4 weeks of onboarding, and secure a return on investment within 6 weeks.

Headquartered in Ireland with offices in New York and London, FlowForma serves 300,000+ global users. A Microsoft Gold partner, its multinational customers include Bouygues, Aon, Grant Thornton and the NHS.

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