

Be Less Tactical; Get More Strategic

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Introduction

The role of the EHS Professional is changing. Traditionally, the safety professional has been viewed as a technical expert who must be proficient in a wide range of methods, controls, and administrative tasks in order to drive safety functioning.¹ Today's EHS Professional must also be a leader, a manager, a coach, and a mentor. None of those traits come easy to a young professional, and many organizations still believe the EHS Professional single-handedly carries the toolset to eliminate injuries, reduce risk, and improve safety performance.

Worse yet, organizations tend to isolate EHS Professionals from mainstream decision-making while requiring them have growing awareness of known and yet to be known EHS concerns needing to be addressed. The pressure on EHS professionals to assume responsibilities outside of traditional EHS, including sustainability, product regulatory schemes and lifecycle analyses, security, and even ethics and community involvement is increasing.

Certainly, future success is going to demand increased proficiency and savvy. At the same time, this new environment presents safety professionals with a new opportunity: partnering with leadership in enhancing organizational culture and performance.² As an EHS Professional, one has the foundation to possess the necessary technical skills to be successful. But what are some of the other skills needed and how can the EHS Professional influence his/her place in the organization to allow for the necessary development to obtain these skills?

In 2008, ASSE's Council on Professional Affairs (COPA) published the findings of a survey of corporate executives' perception of the value of the safety professional in the workplace.³ Generally speaking, EHS Professionals were criticized in several keys areas:

- Too technically focused
- Lack understanding regarding how EHS programs are to be integrated in to the business
- Lack the ability to evaluate the effectiveness of the programs implemented
- Lack strategic planning skills

Vision

Vision is the ability to look ahead and define future performance. Every EHS Professional has a role in that vision:

- Excellent leadership skills
- Excellent management skills
- Ability to mentor and coach employees at many different organizational levels
- Ability to earn the trust and respect of the workers
- Passion for employee safety
- Ability to influence and affect change
- Flexible and adaptive to change

Realizing this level of personal and professional growth means moving beyond the role of the technician toward that of a change agent.⁴ Within John Crane, the Vision of the Global EHS function is simple and direct: *Empowering all employees to be leaders in environment, health and safety*. To empower an employee to be a leader means having inherent leadership qualities and understanding of how to affect change.

Of course, a vision cannot diagnose the steps to achieving a strategy. The barriers to creating desired qualities will vary, depending on the unique configuration, history and culture of each organization.⁵

The Journey

John Crane recently completed a yearlong exercise to develop a five-year EHS strategy, culminating with a Global EHS Leadership Summit in May 2012. The summit not only provided the company a valuable exercise for engagement of the leadership and setting of a long-term strategy, but it also demonstrated how the expectation of the EHS Professional from corporate leaders has changed from primarily tactical in nature to strategic.

Over 30 leaders from around John Crane convened the first-ever Global EHS Summit in the Czech Republic. The two-day event culminated with the identification of critical strategy elements designed to help the organization reach world-class EHS performance over the next five years.

Leaders were asked to discuss the future of John Crane, as related to EHS, in four key areas:

1. Organizational Culture: Achieving EHS Success
2. Training and Communication: Reaching Internal and External Customers
3. Strategies for Managing EHS Risk in Processes, Products, and Properties
4. Defining and Delivering a Sustainable Future

The primary output of the first working group was to drive EHS as a personal value of every employee. While the group felt there was a high level of awareness of EHS across the Division, it was not translating to a personal value of every employee. A general lack of standards and policies at the Division level was a primary contributing factor, as was a general, high level of complacency at many facilities.

The second group focused on both EHS education and training of employees as well as communication with internal (employees) and external customers. The group identified several existing training and communication methods that are working well and should be continued. However, there were number of gaps, including too infrequent communication (related to EHS)

from Division leaders, insufficient resources dedicated to EHS training, a lack of best practice sharing, and a lack of visible commitment to EHS from Division leaders.

Group 3 was tasked with identifying strategy elements associated with EHS risk of John Crane properties, products, and processes. The group identified a threat from a past approach of cascading risk down to a business or function level rather than manage it at the Division level. Further, as was identified by Group 1, a general lack of Global EHS standards makes it more difficult to consistently identify and manage risk across the Division.

The final group focused on sustainability; how does John Crane sustain all of the gains achieved so far plus the ones that will be gained as a result of executing the strategic elements identified by the other groups? Perhaps not surprisingly, Group 4 also focused on culture as a method to drive sustainability of objectives.

The Outcome

After the meeting, the following specific strategy elements were defined by the Global EHS team:

Organizational Culture

- Establish a consistent, global set of standards and create a Global EHS Manual for the Division.
- Drive safety as a personal value by moving to a behavior-based-safety model at select locations where injuries are unacceptably high, increase the sharing of best practices and lessons learned while ensuring sites take action on each to improve processes, and increase leadership involvement in EHS through the Leading Indicator Program and Site Leadership Tours.
- Address complacency by educating and empowering employees with a “stop-work authority,” allowing any employee to stop a job at any time if the risk of injury is not tolerable. In addition, providing more opportunity to include EHS as criteria in hiring new employees and measuring the performance of existing employees – at all levels – is critical for John Crane to sustain performance long-term.

Training and Communication

- Establish a Global EHS Training Matrix to identify basic EHS training and education requirements for different levels within the organization (leadership, management, supervisory, shop floor).
- Standardize training delivery methods and improve online training options for employees with regular computer access by using the Know-How learning platform.
- Ensure overall vision for the Division incorporates a realistic and meaningful EHS vision similar to that of the current Global EHS vision statement.
- With regard to external communication, drive connection between the EHS vision of John Crane and the John Crane brand. Ensure each business/product line connects their products/solutions to the EHS vision.
- Finally, expand communication and visibility of EHS data and messaging through the John Crane website (external) and intranet (internal).

Managing Risk

- For Engineering and Product Line Management, a Division standard process for product design is needed. The standard must include approaches to compliance with complex, global product regulations like REACH (Engineering & PLM).

- Installation and operating standards must include elements of EHS and tie to overall JC EHS vision (Engineering & PLM).
- Supply chain management, including supplier qualification and internal business risk (Procurement & BCP).
- In addition to the strategy identified by Group 1, create a Global EHS Risk Register with control options to apply a consistent approach to identifying and controlling risks associated with the most basic and common parts of the business.
- A facility design standard will ensure that any John Crane facility built or renovated anywhere in the world will be done to the same standard; from energy efficiency (LEED certification) to color schemes, the standard will allow John Crane to take advantage of economies of scale from suppliers and contractors.
- An increased focus on front-end processes, including Pre-Startup Safety Review (PSSR) and Hazard and Operability Study (HAZOP) designed to eliminate unnecessary risk before new processes or products are introduced to the work environment.
- Switch focus for the worker from hazard identification to risk identification. How much is risk tolerable? Intolerable? What does an employee do when faced with intolerable risk? Create a work stoppage program.

Sustainability

- People – defining standards of behavior and coaching employees on expectations (induction, performance management, training, acquisitions, contractors)
- Communication – reinforcement of vision and standards through communication
- Rewards and Recognition – positive reinforcement of desired behaviors.

The Role of the EHS Professional

There is obviously a role of the EHS Professional in both the identification and execution of the identified strategy elements, but this is not the typical job description for an EHS Professional. To be successful, EHS Professionals must be recognized as strategic business partners and not just technical experts.

There are a few ways an EHS Professional can accomplish this:⁶

- Understand your company: You need to know your company's goals and how it makes money. Simply knowing its EHS issues is insufficient; you need to understand your company's position in the market.
- Lead with your strength: Define the biggest or broadest benefit of your program and lead with that. Keep the message simple and consistent.
- Develop the program "brand": All successful programs have a common language, look and feel, regardless of where they are implemented in the company. Develop talking points that provide a quick and easy summary of the program to keep everyone focused on the key goals.
- Identify your best (internal) customers: If you can identify and engage those who will gain the most from the new program, they can help you sell it. Listen to the "voice of the customer" (or voice of the employee) and use their words to engage them and get them excited about the new program.
- Know your competition: There will be other programs that will compete for time and money. You need to have a plan to address these challenges and convince detractors that they can also gain from your program.

If given the opportunity, EHS Professionals should participate in the development of a 5-year functional strategy and obtain a new perspective on their expectations into the future. The model job description for an EHS Professional has shifted from that of a technical expert to that of leader. How do the skills the EHS Professional possesses add value to the organization, affect change, and influence other leaders?

At the 2012 ASSE PDC, David Galt summed it up best when he wrote, “The EHS professional must become:

- A strategic thinker—align actions with the organization’s business objectives.
- Proficient—develop methods that integrate EHS performance into business productivity; understand financial related terms and information; and demonstrate EHS performance in a financial framework.
- A leader—align EHS activities with overall business strategy and effectively communicate the vision to management and to workers.
- Versatile—learn and integrate a wider range of disciplines such as employee wellness, “greening” business practices, security, emergency preparedness, business continuity, and risk management.”⁷

Endnotes

¹⁻² Grover, Donald R. “The Emerging Role of the Safety Professional, Part 1.” *Occupational Health & Safety*. Apr. 2008.

³ Lawrence, Tom. “The Versatile SH&E Pro.” *Professional Safety*. May 2008: 24.

⁴ Grover, Donald R. *Ibid.*

⁵ Krause, Thomas R. “Steps in Safety Strategy: Making Change Work.” *EHS Today*. Dec. 2009.

⁶ National Association of EHS Management (NAEM). 2012. *The Art of Selling Environment, Health & Safety* (retrieved 13 March 2013) (<http://greentia.naem.org/category/ehs-skills/>).

⁷ Galt, David. “How to Promote the Business Value of EHS.” *Safety 2012: Proceedings of the ASSE PDC*. Denver, 2012.