

## CASE STUDY



Australia's leader in transport fuel manages risk and incidents with EHS Manager 360.

How Caltex manages the perfect storm of risks.

**“By implementing these processes, we have been able to ensure consistent tracking and completion of actions to minimise the risk of incidents and their reoccurrence, and maximise compliance across the business.”**

– AMY MILIAUSKAS  
OE Systems & Technology Specialist, CALTEX  
AUSTRALIA

### AT A GLANCE

A proud and iconic Australian company, Caltex has grown to become the nation's leading transport fuel supplier, with a vast network of approximately 1,900 company-owned, franchised or affiliated sites. It operates as a refiner, importer and marketer of fuels and lubricants.

Caltex moved away from a dated and unreliable incident tracking system to one that allows them to effectively track outstanding tasks and hold people accountable for their duties throughout the process.

Requiring a bespoke solution, EHS Manager 360 (formerly Cintellate) enabled the company to make custom form and workflows without hiring expensive developers. With the accomplishments made to date, including robust reporting and more efficient incident management, continuous improvement efforts ensure they remain the leader in transport fuels.

### CLIENT BACKGROUND

With a history tracing back to 1900, Caltex has safely and reliably fuelled the needs of Australian motorists and businesses for more than a century. It operates as a refiner, importer and marketer of fuels and lubricants, and is listed as CTX on the Australian Securities Exchange.

Through its extensive supply chain, Caltex has forged a reputation for providing a safe and reliable supply of high-quality fuels to diverse customers in retail, mining, agriculture, aviation, transport, small-to-medium enterprises, marine, automotive and government.

## SOLUTION

Caltex has dedicated programs designed to ensure a consistent and effective approach to business critical objectives including:

- Risk Management Framework: An enterprise-risk (ERM) program used for board-level reporting.
- Management of Change: ensures risks and benefits are identified and communicated throughout the organisation for minimal disruption.
- Loss Prevention: A licensed incident investigation process commonly used by oil ad gas industry companies.

Since Caltex was already using EHS Manager 360 for Risk Management and its Management of Change program, extending the platform's functionality to their Loss Prevention System was a natural progression. EHS Manager 360's

web-based designer toolkit allowed Caltex to take the existing Incident module and configure it to match the existing Loss Prevention process, with no software updates. This high degree of configurability proved valuable.

In less than three months, Caltex upgraded their system and implemented the Audit Module additional to the other functions already in use.

This allows employees to quickly create and edit the audit templates scoring and answer types, and makes it easy for the support team to create their own audit templates as business needs evolve.

The majority of audits conducted across Caltex is now centralised within EHS Manager 360.

## RESULTS

Caltex now enjoys a flexible tool for the Loss Prevention System which has better

integration for action management. Caltex partnered with SAI Global to build a weekly summary report which notifies employees on the status of their outstanding action items. Digestible notifications are categorised by modules, then by actions – consistent with the Risk Management and Management of Change programs.

According to Amy Miliauskas, Caltex OE Systems & Technology Specialist, "By implementing these processes, we've been able to ensure there is consistent tracking and completion of actions, which minimises the risk of incidents, their reoccurrence, for increased compliance across the business."

One of Caltex's key performance indicators was 'Usage'. They wanted to ensure no drop off in usage during or after transition from the old system. Impressively, they saw usage had increased within one month of implementing EHS Manager 360 as shown in the table below.

SEP 2015 MONTHLY STATS (Prior to EHS Manager 360)		NOV 2015 MONTHLY STATS (1 month after EHS Manager 360)	
40	Loss Investigations	58	Loss Investigations
148	Near Loss Investigations	166	Near Loss Investigations
1,068	Loss Prevention Observations	1,011	Loss Preventions Observations
36	Report Only	38	Report Only

80% REDUCTION IN OPEN AND OVERDUE ACTIONS	
March 2016	840 open and overdue actions
May 2016	304 open and overdue actions
August 2016	160 open and overdue actions

## WHY SAI GLOBAL?

Caltex's relationship is a partnership with SAI Global - not the typical vendor relationship. Caltex works with SAI Global to maximise their engagement, such as developing a rollout schedule with the SAI Global account team at the start of the year to allocate resources in sync with EHS Manager 360's releases. Caltex acknowledges that improvements are not project-based, but continuous. They plan to take advantage of all enhancements and upgrades from future EHS Manager 360 releases.

In 2016, Caltex implemented a Continual Improvement program based on quarterly cycles. Throughout the year they prioritise feedback from employees then schedule changes during quarterly reviews. This has helped fast-track the working arrangement with SAI Global, and provides them with assurance that they are partnering with a vendor who is listening to feedback and working to ensure their goals are achieved.

Caltex is also able to better manage geographically dispersed teams, as show in their reduction in Open and Overdue action items with the implementation of the weekly summary reports.



## About SAI Global

SAI Global helps organizations proactively manage risk to create trust and achieve business excellence, growth, and sustainability. Our integrated risk management solutions are a combination of leading capabilities, services and advisory offerings that operate across the entire risk lifecycle allowing businesses to focus elsewhere. Together, these tools and knowledge enable clients to develop an integrated view of risk. To see our tools in action, request a free demo.

We have global reach with locations across Europe, the Middle East, Africa, the Americas, Asia and the Pacific.

For more information visit [www.saiglobal.com/risk](http://www.saiglobal.com/risk).