

## Case Study

# Redi Services

Redi Services Improves Safety and  
Incident Reporting with Case IQ Case  
Management Software

"I wanted our local HSE managers to have more time in the field doing proactive coaching and training... versus reactive stuff like incident investigations."

Lance Norris  
HSE (Health, Safety and Environment) Director



## Project Overview

# Redi Services Improves Safety and Incident Reporting with Case IQ Case Management Software

Streamlining workflow and eliminating repetitive tasks saves Redi Services \$10,000 to \$12,000 per year and helps to prevent incidents and accidents.

## The Challenge

Historically, the HSE team had been doing very little tracking and trending of incidents and accidents and were missing the valuable opportunities for prevention that come with data reporting and root cause analysis. Their methods for tracking were inefficient and inconsistent across the company. With the notification of incidents taking too long, it jeopardized the team's ability to comply with requirements to report incidents within a 24-hour timeframe.

## The Solution

The Redi Services HSE team needed a cost-effective incident management solution that was easy to use and enabled consistent and fast reporting and messaging across the organization. Their needs included: a single repository, automated notifications, a centralized system for completing regulatory filings, a structured workflow, and a mechanism for tracking corrective action and follow-up.

## Short-Term Solutions Couldn't Fill the Gaps

When Lance Norris, HSE (Health, Safety and Environment) Director, joined the company 10 years ago, Redi Services was smaller, with less onerous requirements for incident investigation and reporting. Even so, the company was doing very little tracking and trending of incidents and accidents, missing the valuable opportunities for prevention that come with data reporting and root cause analysis.

They began with a low-cost solution, tracking incidents using Excel spreadsheets. Redi Services soon transitioned to an Access database solution, but had difficulty setting up and maintaining it. "There was a lot of work and rework and just really a lot of effort," says Norris.

Neither the Excel nor the Access solutions provided a way to notify stakeholders about incidents. This manual method for notification of incidents took valuable time and the team needed to comply with requirements to report incidents within a 24-hour timeframe.

Final reports would be submitted to Norris, who would enter the data onto a spreadsheet.

In addition, the database was housed on an internal server, which put the system and the data at risk.

"There was a lot of inconsistency. When you've got people doing data entry in five different states... incident reports did not look the same across the company."

-Lance Norris,  
HSE (Health, Safety and  
Environment) Director

## Structured Workflows and a One-Stop Shop for Reporting

Redi Services needed a cost-effective incident management solution that was easy to use and enabled consistent and fast reporting and messaging across the organization.

They also needed a single repository to keep all documentation in one place with secure access to case information for those who require it. Having all the incident information organized and centralized would make it easier to complete the OSHA 300 log, MSHA 7000-1 form or other regulatory filings when required.

Their final priority was a structured workflow with built-in automation for alerts and notifications of incidents so that they could meet the 24-hour notification requirement and avoid penalties.

“I was looking for an efficient system to ensure when we enter an incident, it sends an email to our executive team, so that everybody’s getting the same message,” says Norris.

The team needed a powerful reporting tool to get an overview of incidents and do root cause analysis. Tracking corrective actions and follow-up was also important.

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-Lance Norris,  
HSE (Health, Safety and Environment) Director

## Increased Speed + Efficiency = Saving Time AND Money

Since implementing Case IQ in 2017, Redi Services has seen dramatic improvements in efficiency and risk management.

HSE managers now enter incidents into Case IQ quickly, often within 20 to 30 minutes of notification, well below the 24-hour requirement. Once an incident is entered, automated notifications alert the executive team immediately upon the submission into Case IQ.

The executive team is able to conduct root cause analysis in a timely manner, with all relevant supporting documentation easily accessible and customers get quick written notification of incidents as soon as the executive team has conducted their review.

Having all documentation centralized means completing regulatory filing forms is quick and efficient. This also helps when cases involve legal action.

“Two years after an incident, when I’m dealing with a worker’s comp claim or liability on an auto claim, I have all the data, all the evidence right there,” says Norris. “When the lawyer requests it years down the road, it’s easy to go in and print it out and send it off to them.”

“Redi Services saves \$10,000 to \$12,000 per year as a result of time saved entering health and safety incident data.”

-Lance Norris,  
HSE (Health, Safety and Environment) Director

## The Result

Case IQ's automated tasks save the HSE team hours of time every day, which saves the company money.

Redi Services has access to valuable current and historical incident data for analysis and prevention. Based on reporting in Case IQ, the company has implemented programs to improve safety. "We've implemented a 'get out and look' backing safety program and we put a lot more emphasis on defensive driving," says Norris.

### Great case management tool

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-Lance Norris,  
HSE (Health, Safety and  
Environment) Director

## Investigate and Prevent Workplace Misconduct with Case IQ

Case IQ helps you investigate, prevent and protect your company from fraud, harassment and compliance lapses to lower risk for your organization.

Find out more about how Case IQ can help your team conduct more effective investigations and prevent ethics and compliance lapses.

### Book a demo:

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