

Helping RBS
reinforce a
strong culture of
Risk Management
and improve
its Contractor
relationships



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The Challenge

As a business with as much focus on people as profit, RBS understands how work related incidents can disrupt its services, even bring them to a halt, with potentially dire commercial and financial implications. So, averting such unpredictable events by reducing exposure to operational failure, injury, litigation or worse, is imperative.

As part of a proactive new approach, RBS considered the risks associated with the management of its diverse property portfolio, the many and varied Contractor and Subcontractor vendors required to maintain it and how these partners could be aligned more acutely with the Bank's strategic Health & Safety policies. Because, despite its relative success in managing literally thousands of work projects each year, while minimising human and operational impacts, RBS realised its ongoing commitment to Health & Safety and to minimising operational risk could only be measured by the obvious strengthening of deficient areas.

With contracted workloads increasing and different work authorisation mechanisms and processes being applied across its Business Units to manage them (many of them paper based and manually administered), RBS turned its attention towards its need for greater control of its Contractors and visibility of the works they were charged with carrying out. Significantly, completion of work, whether satisfactorily undertaken or otherwise, was more often signalled by an invoice than a work closure notification or change update. This had to change!



RBS Property Services took the view that an automated system was now required to bring new levels of Group-wide consistency, effectiveness and visibility to its Property Management processes, with particular emphasis on the control of its Contractors and the management of these relationships.

However, with more than 1500 properties in its portfolio, RBS considered that imposing such a procedural change across its estate would be better served by evidencing success in a contained environment, where a new safe system of work could be easily introduced, trialled and lessons learned, ahead of any decision to expand its usage.

To ensure the robustness of a new automated system, RBS Property Services chose to focus upon the company's Bishopsgate Campus in London - four very different properties, providing very different operational challenges. A working environment to over 8000 employees and arguably RBS's most business-critical functions, including Investment Markets, International Banking and its Corporate Team, this campus would present the most testing conditions for any system. But, success here would provide strong evidence of RBS's improved duty of care and potentially, the basis of a strong business case for Group-wide system adoption.

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Response

In 2010, armed with a very tight system specification based on current operational, regulatory and legislative requirements, RBS exhaustively explored its work authorisation software solution options. Mindful of the rapidly changing financial world, it was to place significant emphasis on system flexibilities which were viewed as a pre-requisite not only towards maintaining Health and Safety compliance over time but also to ensuring that future improvements to work processes were not inhibited by inflexible systems.

And, while RBS recognised shortcomings in its work authorisation processes and could see enormous merit in their consolidation to form a new consistent and much more efficient approach, it wished to retain operational familiarity with them. The successful solution provider would therefore not only have to demonstrate system efficacy, configuration flexibility, smoothness of integration and speed of deployment but also evidence intuitive system interaction as a significant requirement of the selection criteria. These latter elements of the specification were seen as pivotal to early adoption by both the internal nominated users and RBS's approved Contractors.



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Solution

RBS entered into a Work Authorisation System search which it completed in January 2011. From a selected list of four specialist software vendors, RBS finally settled upon GEMsoft7's versatile P2W software system, which quote "ticked all of our boxes – literally!"

Within just three months, start to finish, RBS's entire work authorisation and permitry processes had been mapped onto P2W and the system deployed across the four properties within its Bishopsgate Campus, under the administrative supervision of GSH Group, RBS's building maintenance contractor.

Using P2W's powerful authorisation engine, RBS's Property Services Team now have complete control and visibility of all work carried out at its Bishopsgate Campus. But, perhaps fundamental to proving their duty of care are the

automatic audit trails captured in the P2W Journal. These drastically reduce the time taken to perform an audit, while increasing the accuracy of it, actions which further support RBS's risk management strategy and reduce the company's work related exposure.

Today P2W provides RBS, GSH and their many varied operational Contractors with new and improved levels of information, enabling qualified, safe decision-making which will withstand audit scrutiny including, but not limited to, the following:

- the scope of each work task
- issue of specialist Permits to Work
- the person responsible
- the component skills required by the work party and the competence of each member to undertake the work

- the RAMS (Risk Assessments and Method Statements) are loaded into P2W allowing RBS and the Contractor to jointly review and revise them, until both parties are happy with the content
- confirmation, when authorisation for work has been granted by all required parties with RBS
- the identification of the need for permits and the creation of the same
- a pipeline of live data enabling changes, suspension or termination of works in progress
- a close-off process that ensures all works have been completed satisfactorily and documents are updated before payment can become a consideration

And, all of this information captured and controlled on just two web pages!

RBS Experiences of P2W

As with many things "new", the prospect of change was met initially with a moderate level of scepticism and cynicism. However, the speed of configuration and deployment, in just three months, led to the removal of any such misgivings, with the overall response perhaps best encapsulated in the anecdotal comment "I wouldn't change the P2W process, if starting out again. Easy to deploy and it achieved 98% of what we specified from the outset, with the remaining 2% accounted for by configuration".

Within weeks of "go live", the RBS Property Services Managers and Management teams across the four London locations could see P2W was very much aligned with RBS's operational and strategic objectives and remarkably easy to engage with.

Over the ensuing six months, work authorisation times were cut, in some instances, by as much as four weeks, to just days and hours; communications with Contractors and Subcontractors were demonstrably improved with site access speeds increased and downtime reduced; and RBS's Bishopsgate Campus moved from being considered a "high risk" location to a well managed risk mitigated location; a position underpinned by an indelible and auditable record of RBS's diligence in maintaining Health & Safety compliance.

A key factor in the success of the P2W system is the improved levels of visibility it brings across RBS's Bishopsgate Campus. Now all the relevant internal Property Managers have complete visibility of and access to what is

going on in their respective buildings, with senior management staff able to monitor, review and risk mitigate remotely, by questioning or rejecting contractor submitted work requests, as appropriate. And, everyone using P2W is confident the processes being employed are compliant with all British and international regulations and legislation.



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Contractors' Experiences of P2W

Working with a new work authorisation system appeared daunting to some contractors too. But, not to GSH Group, RBS's building maintenance contractor at Bishopsgate! For them, this was to prove an invaluable opportunity to demonstrate the company's real sense of partnership, by aligning itself with RBS's operational and strategic objectives.

P2W is now widely held as having significantly contributed to the streamlining of communication between RBS, GSH and their subcontractors. By granting access to P2W, via the Contractor Portal, RBS's contractors can now prepare their own Work Requests, induct work parties or individuals remotely, check that work is properly

authorised and keep their workforce competences up to date, among some of the many benefits.

Works are now meticulously scheduled ahead of time, so contractors do not turn up indiscriminately and administrative disciplines are now well established which ensure close-off procedures are consistently adhered to, including the filing of change documentation, as a precursor to payment.

So, everyone within the Customer/ Contractor relationship now clearly understands their respective responsibilities and consequently each party has a quality expectation of the other.



Conclusion

In the fast moving world of finance, RBS accepts that modern day pressures on time and money increased the likelihood of shortcutting and human error, which their Risk Management Strategy is addressing. Against this backdrop P2W is playing its part in upholding RBS's ambitions by ensuring its work authorisation processes and its Contractors comply with current legislation and sector regulations. But, perhaps more importantly, P2W is providing the safe system of work, which day in day out protects RBS's assets, its people within them, its corporate and brand reputations and everyone who has a reason to come into contact with them.

As a result of the Bishopsgate Campus trial, P2W has proven to provide RBS with a robust and enhanced Health & Safety platform for its many operational contractors. Its successes are now the subject of a review, undertaken to inform and enable key decision-making on the roll-out an e-permit system across the UK and potentially globally.

The RBS work authorisation project, including the successful P2W trial initiative at RBS's Bishopsgate Campus, London, has been led by RBS Technical Operations, working in partnership with Dermot Griffin, GSH Group and the GEMsoft7 team, led by its CEO, Phil McKell.

P2W has proven to be something of a catalyst in homogenising working relationships between RBS and its contractors and has completely removed the common misconception that implementing more control will bring more delays or make existing processes more protracted.

Quite the contrary, moving to P2W, has brought additional process improvements to both RBS and GSH Group, invoking new disciplines which smooth each of their working days, by anticipating operating issues and seeking approvals ahead of time, giving everyone peace of mind and the luxury of time to consider wider operational issues.

For Information

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