eBook

5 Reasons Why EHS Software Purchases Fail

(And How You Can Avoid Them!)

VelocityEHS®

Contents

Introduction

You've done the demos, evaluated the software, and decided which vendor is right for you; however, the purchase process is not yet complete. Even after all of the hard work and time invested in finding the right solution, the purchase process can easily lose momentum, or worse, fall apart completely.

Taking care of your people's heath and safety is no easy task and having the most efficient tools in your toolbox is key to ensuring everyone goes home safe. It's also important to keep in mind that a strong EHS management program is the foundation to building Environmental, Social, and Governance (ESG) maturity.

Selecting an EHS software system for your business is an important decision, but it's only the first step to ensuring the long-term success and value of your software purchase. Maintaining your commitment to change, as well as the commitment of your stakeholders throughout this process is vital to a successful purchase.

There are five primary reasons why an EHS software purchase can fail:

1. **Fear of Change**

2. **A Weak or Unconvincing Business Case**

3. **EHS Software Is Too Convoluted and Complicated to Navigate**

4. **Loss of Your Champion**

5. **Future Uncertainty**

Understanding and anticipating these reasons, and developing strategies to keep your momentum going are the keys to driving the process through to completion. Let's look at them up close and discuss strategies for overcoming each obstacle.

> ***Provide stakeholders with a clear roadmap of the purchasing process from start to finish. This will help everyone establish realistic expectations and prepare for the potential dip in enthusiasm and support that can occur throughout the process.***

1. Fear of Change

Your stakeholders may begin to feel uncertainty or apprehension towards purchasing and implementing EHS software as you approach the end of your journey. It can, after all, be a dramatic shift in the way your company collects, manages, and uses EHS data, and it represents a fundamental change in how you administer your management programs. For some of your stakeholders, this may imply an investment of time, resources, and money they may feel are in limited supply, and that the perceived benefits of the software do not justify the initial costs.

The underlying reasons behind this fear of change can go beyond the mere cost of purchasing the software. Recent surveys suggest that some stakeholders fear the purchase of software programs because of long implementation processes and delayed return on investment (ROI). This uncertainty has the potential to intensify as you enter the later stages of the purchasing process, and may ultimately derail your efforts to select and implement a system.

How Do I Overcome It?

1. **Change the Narrative:** To overcome fear of change, stakeholders need reassurance. Try and shift their focus from the risk of implementation to the rewards. Be prepared to provide stakeholders with facts and statistics to remind them of the gains in efficiency, cost savings, and ROI that the software can provide, while reminding them of existing pain points. Make it clear that the cost of inaction is ultimately greater than the cost of the system—and it is a cost that grows larger with each day.

2. **Find Friends:** Find and talk to other companies and EHS professionals who have been where you are to learn how they successfully handled challenges to implementation, and what advantages they have gained as a result.

   If you have peers from industry groups you belong to who have been in your situation, they can be a great resource. If you don't know anyone, your vendor should be able to connect you with references and resources who can give you the extra assurance your team requires.

3. **Ask for Help:** Reach out to your prospective vendor, as well. A good vendor will be able to provide you with the necessary information, including case studies and success stories from other customers, customer satisfaction and retention rates, implementation timeframes, cost analysis tools, and other materials that you can use to build and maintain support while addressing the unique concerns and interests of stakeholders. At VelocityEHS, we have a wealth of experience in guiding customers through the challenges of the purchasing process, and can be an invaluable resource to help alleviate any confusion or uncertainty.

How Do I Avoid It?

Continually remind your stakeholders, and yourself, of the needs and objectives that set you on your EHS software journey to begin with. That catalyst, whatever it may be, was obviously significant enough to spur you to action in the first place. Losing sight of those needs and objectives has the potential to leave you right back where you started, without having addressed the challenges or opportunities facing your organization.

When working with various stakeholders, be careful not to understate the value that the software can bring to your organization, and ensure that they have a firm understanding of these benefits. Again, ensuring that those benefits are clearly defined and closely aligned with your company's underlying business needs is one of the hallmarks of a successful EHS software purchase.

Finally, try to know where you're going before you get there. Provide your stakeholders with a clear roadmap of the purchasing process from start to finish. This will help everyone establish realistic expectations and prepare for the potential dip in enthusiasm and support that can occur throughout the process.

2. A Weak or Unconvincing Business Case

When it comes to implementing a software system to manage EHS across the organization, knowing the true costs and the total value of the system is fundamental to building an effective business case. In most cases when push back is the price of the system it's usually because of a weak business case.

Acquiring stakeholder buy-in and maintaining a sense of urgency for an EHS software purchase requires the presentation of a highly effective and persuasive business case. An effective business case for EHS software is an important asset that every EHS professional should be able to develop in order to communicate the value of the software, not just in dollars and cents, but in a way that resonates with the unique interests of stakeholders at every level throughout your organization. Unfortunately, many software buyers struggle to effectively communicate the value of software to their stakeholders, particularly to top level managers and other individuals responsible for the financial performance of the company. Don't just talk money—talk productivity, talk engagement, talk risk avoidance. Speak your stakeholders' language.

▶ How Do I Overcome It?

1. **Create a Business Case Artifact:** Often in business, the medium is the message. Simply presenting your information in an organized, easily digestible, and attractive fashion bolsters your argument as much as the actual content. Presentation matters.

2. **Define Value through Data & Evidence:** Gather the information that speaks to problems and pain points you seek to resolve. Add up the costs of workplace injuries and illnesses, both direct and indirect. Don't forget the costs of training replacement workers and lost productivity. What would reducing your workers' comp premiums do to your bottom line? Assemble positive proof points of the value software can deliver. It can be difficult to build a traditional ROI case; however, there is a wealth of evidence available to demonstrate that an investment in EHS is an investment in the bottom line.

3. **Frame the Discussion Properly:** Speak the language of your stakeholders, and match your message to the audience. Your stakeholders have their own interests, and are likely to be focused on how the software implementation affects their specific roles. For example, purchasing managers and corporate executives may be primarily concerned with how EHS software can support the bottom line and drive long-term growth, or how it can help control risk and secure the company's reputation. IT personnel may be focused on how the software supports data security and IT systems integration. Operations managers may be most concerned with how EHS software will improve efficiency and productivity, while EHS personnel and employees may be most focused on how it will help create a safer workplace and make their jobs easier.

   If your business case has accounted for these factors, yet you find that a particular stakeholder group is unresponsive, it is most likely because you have not fully understood or articulated the needs and interests of those individuals. Work collaboratively with them to identify their unique needs, and revise your business case to ensure they are thoroughly and accurately addressed.

4. **Look for Friends in High Places:** One of the easiest ways to jumpstart stakeholder buy-in is to find an ally in the C-suite. Try to cultivate support from individuals at the top of the corporate ladder, and start building bridges there. Look for someone that you may already have a strong relationship with, or someone who you believe will at least hear you out. If you're successful in presenting your business case, that individual may be willing to advocate the software purchase to other members of executive management. Try to get as high up the executive ladder as you can reach, and support for implementation will come from the top-down.

5. **Ask for Help:** Reach out to your prospective software vendor. Again, your vendor should be able to provide you with case studies and success stories from other customers, customer satisfaction and retention rates, implementation timeframes, preliminary cost analysis tools, and other materials that you can use to address the unique concerns and interests of stakeholders, and build support for an EHS software implementation. At VelocityEHS, we have successfully helped thousands of customers build a story that credibly articulates the value of an EHS solution.

How Do I Avoid It?

An important step in preparing your business case is to ensure clear alignment between the benefits of the software and the business needs you identified earlier in your journey. Prepare examples of how EHS activities align with the organization's overall business strategy, and how EHS performance is integral to your company's productivity and sustainability. Also, be sure to identify and highlight the right metrics to demonstrate value to YOUR organization. Whether it is cost savings, reductions to incidents and injuries, or increased sustainability performance, the metrics you choose should strongly reflect those same business needs and organizational priorities.

When presenting your business case, think big, but start small. Begin by presenting your business case to the stakeholder groups that are likely to be more receptive to the idea and present it in a way that addresses their specific needs and interests. This will also give you the opportunity to build relationships with your stakeholders, particularly with business and financial managers, in order to influence their perception of EHS issues. After presenting to these groups, incorporate their feedback, review and revise your business case, and continue up the chain until you have obtained buy-in from all of the various stakeholder groups within your organization. In this way, you will build momentum and support for an EHS software purchase from shop floor, to top floor.

3. EHS Software Is Too Convoluted and Complicated to Navigate

One of the priorities when selecting an EHS software solution is finding one that's user-friendly, easy to implement, and best suited for your goals. Complex software solutions can ultimately cause more problems than they solve. When shopping for a software solution, it's easy to be taken in by a slick layout while watching an expert on the system make it all seem easy while flying through the demo.

EHS software should make everyone's job easier and more efficient, whether it's executives, laborers, supervisors, EHS managers, etc. Some users will be more tech-savvy than others, so implementation and use of the software must be simple. The selection process becomes a balancing act between meeting stakeholders' needs and abilities while clearly defining the "must haves" and "would be nice" features that could add complexity to the software. Software that is too convoluted and complicated to use can result in stakeholders not using it, and what good is any tool if it's not being used?

▶ How Do I Overcome It?

1. **Focus on Your Stakeholders:** Implementing EHS software should be done with a variety of users at the top of your mind—the executive who needs a clear snapshot of performance, managers performing inspections, and laborers who need to fill out a near-miss observation, for just a few examples. Try not to focus on software that offers the most features and capabilities. Instead, dig into the features and capabilities that are being offered and ensure they help your stakeholders meet the goals they and you are trying to accomplish. In most cases, the more features in a software program the more complicated it can be. A good strategy is to start small. Start with the basics to make it easy and straightforward for stakeholders to use the software. Once they're familiar with the system, then consider adding more features and capabilities.
2. **Revisit Your Needs Assessment:** It's important to understand that starting small does not mean you won't have big results. Even the simplest software can provide powerful solutions and outcomes. It's like the question, "How do you eat an elephant?" Answer: "One bite at a time." Take the first bite, chew it, digest it, and then take the next bite. The thing to remember here is to just get started. Go back to your needs assessment and identify the true needs and challenges confronting your organization. Then, give priority to solutions that offer greater ease of use and achieve higher levels of end-user engagement. Remember, it's not about the software, it's about the people who use it.
3. **Revisit Vendor Profiles:** Too often, the selection process becomes fixated on all the bells and whistles offered by various competing software systems and overlooks the fact that at the end of the day, the real driver of long-term success is the partnership that exists between you and your solution provider. This is a good time to go back and check key indicators like customer satisfaction and renewal rates, and seek answers to tough questions like, "How many current customers are on the latest version of the vendor's software?" Remember, you're not just buying a solution for the here and now, but a solution that will meet tomorrow's needs, as well. It's not only the initial cost of implementation, but the cost of updating, maintaining, and renewing the software that should be deciding factors.
4. **Ask for Help:** If you're having trouble understanding the navigation of the system, your software vendor should be able to provide honest and objective advice on how to help you better understand the platform and make sure the needs of your organization are being met beyond mere features and functionality. VelocityEHS offers a full array of valuable support services to help you and your team stay on track with implementation & on-boarding, user training, and technical & user support. Our expert implementation and Customer Success teams are here to help ensure you get a solution that meets your needs—now, and in the future.

How Do I Avoid It?

To avoid the pitfalls of purchasing a system that is too convoluted and complicated to navigate, take the time early on to do an in-depth needs assessment, and develop requirements based on those needs. **Then, develop a standardized, unbiased, and objective list of selection criteria prioritizing what problems need to be addressed first.** Your selection criteria should also be worded in such a way that leaves little or no room for personal interpretation and provides a clear affirmative or negative response as to whether a software solution meets those criteria. A good vendor will work with you to determine which features and capabilities will benefit you the most and which ones you can wait to implement.

Create a short list of criteria (approximately 20 questions, depending on your organization's needs) that evaluate not only the software's core technical capabilities, but also more qualitative attributes like ease of use, levels of user engagement, availability of software enhancements, access to customer support, speed and ease of implementation, whether implementation requires outside consultants, and the total cost of ownership. Laying out these criteria clearly and early in the purchasing process will help eliminate confusion and subjectivity when it comes time to select a software vendor and have the essential features and capabilities in place.

4. Loss of Your Champion

Navigating an EHS software purchase is a team effort. Yet, the push to purchase and implement an EHS software solution is often championed by one individual. This is typically an EHS manager or director, though sometimes the effort may be carried out with the support of (or even at the request of) a particularly insightful executive or management committee.

Regardless, the EHS software purchase process takes time. A lot can happen during this time, including the loss of your champion. They may leave the company or transition to another role, leaving your bid to purchase and implement an EHS software solution without its biggest advocate. In the worst cases, it has the potential to defeat your efforts toward a timely purchase and/or effective implementation.

How Do I Overcome It?

1. **Regroup & Reassess:** Loss of a champion is a particularly difficult challenge to overcome, but not impossible, especially if you factor in some additional time into your purchase and implementation process. If you know your champion is likely to leave, don't wait! Take steps immediately to find a replacement and fill in the gaps. If your champion departs suddenly and unexpectedly, the first step is to perform an honest assessment of where you are in the process, what steps are left, and whose sign off is required. If the outgoing champion was also the person holding the purse strings, it may be necessary to secure a commitment from another supervisor.

2. **Be the Champion:** If you are reading this item because you have lost your champion, there is a good chance that you are the best candidate to replace them! Rather than looking at it from a glass half-empty perspective, this could be a great opportunity for you to demonstrate your leadership and project management skills. If you're uncomfortable fulfilling that role, it is critical to find someone with the talent and/or passion to get things done.

3. **Rally the Troops:** Even if you haven't lost your champion, it's important to nurture the sense of enthusiasm and excitement for implementation among members of your selection team. Continue to provide stakeholders with resources to help further educate them about the benefits and value of EHS software, and how to navigate the purchasing process itself. Above all, keep the momentum going.

4. **Ask for Help:** Remember, that you are not alone on this journey. Your prospective EHS software vendor, if they have a good track record, should have experience and expertise in helping customers to successfully overcome challenges similar to your own. Don't hesitate to reach out to them. VelocityEHS can provide the guidance to get your new champion up to speed, and equip them with the information they'll need to lead the purchase to completion.

How Do I Avoid It?

The best way to avoid the complications that the loss of a champion can bring is by building widespread buy-in and support for EHS software implementation from your stakeholders early-on in the process. Also, be sure to develop and follow a plan for your EHS software selection, purchase and implementation, and make sure the members of your selection team are familiar with it. Maintain formal documentation of your activities and progress throughout the EHS software purchase process, and make sure that these records are easily accessible to all members of the selection team.

Emphasize the collective nature of the EHS software purchase process by holding regular meetings and discussions to help make the process as transparent and inclusive as possible. This will help promote a sense of community and ownership surrounding the selection process, as well as accountability for its success. Transparency and sharing of information will not only promote stakeholder buy-in, but it will also prepare each of your selection team members to fill the gap should you experience the loss of your champion.

By following these guidelines, you will effectively distribute leadership and ensure that if your champion departs, others will be prepared with the resources they need to fill the gap and carry the purchase through to completion.

The best way to avoid the complications that the loss of a champion brings is by building widespread buy-in and support for EHS software implementation from your stakeholders early-on in process.

5. Future Uncertainty

Even after you have carefully evaluated vendors and solutions and have made a final decision on which one is best suited to meet the needs of your business, there may still be obstacles to overcome before you can complete your purchase—such as the uncertainty of not knowing what the future will hold. The COVID-19 pandemic is a prime example of this type of uncertainty that just about every business was not prepared to handle. These types of challenges can force businesses to reconsider their priorities and how they should allocate their capital expenditures.

How Do I Overcome It?

1. **Get Your Bearings, Get the Facts:** When faced with an uncertain future it can be easy to view purchasing an EHS software platform as something that can wait. However, in the wise words of Benjamin Franklin, "Don't put off till tomorrow what you can do today."

   An EHS platform should be viewed as an investment in your organization, not as a cost because in the long run, putting a price on your employees' safety WILL cost you more. Another big realization COVID-19 brought to light is that employees need to feel valued and are demanding more from employers. There are many studies available showing businesses that prioritized health, safety, and sustainability during and after the pandemic have experienced fewer financial hardships. Aside from such studies, there are numerous other resources to help quantify the ROI of safety. OSHA's website has easy-to-use "Safety Pays" tools to help provide information on the frequency and costs of work-related injuries and illnesses. Whatever you build your business case on, make sure you get the facts and figures to support your case and ease fears of an uncertain future.

2. **Get Clarity:** Reach out to the decision makers to clearly understand where and how budgets are being allocated, what steps you must take, what information you must submit, and in what order for them to evaluate and approve the EHS software purchase. Also, ask for examples of well-executed past proposals, and don't be afraid to ask for clarification as many times as you need it. It is your persistence that matters most in this stage.

3. **The Most Committed Wins:** Uncertainty can almost always be overcome, as long as you don't allow it to dampen your commitment to reaching your goals. As mentioned above, a great strategy is to break down individual objections and address each with relevant evidence supporting investment in EHS software. It's just like eating that elephant. Take it item by item and each time you complete a task or milestone, gain confidence in knowing that you're one step closer to your objective.

4. **Ask for Help:** Reach out to your prospective EHS software vendor. A good vendor will be able to help you navigate the bureaucracy and speak the language of whatever department you're talking to. At VelocityEHS, we work with companies of all sizes, with a wide range of purchasing protocols to help them reach their goals.

How Do I Avoid It?

Unfortunately, you can't predict the future. There's no guarantee another pandemic or economic crisis isn't looming around the corner. The one constant you can count on is change. So, why not get ahead of change by establishing an EHS management program that is more scalable and adaptable? COVID-19 brought employee health and safety concerns to the forefront, and as mentioned above, businesses that prioritized health, safety, and sustainability have been less exposed and vulnerable to operational risks. If challenges

like COVID-19 have caught you off-guard, don't lose heart. While we can't change the past, we can certainly learn from it. Research similar businesses and industry peers to identify what factors, approaches, and strategies made the difference between those who successfully navigated challenges like COVID-19 and those who didn't. Familiarize yourself with what funds are available and what the "must address" business needs are, then build a business case showcasing the cost-saving benefits, growth opportunities and underlying value of investing in an EHS software system.

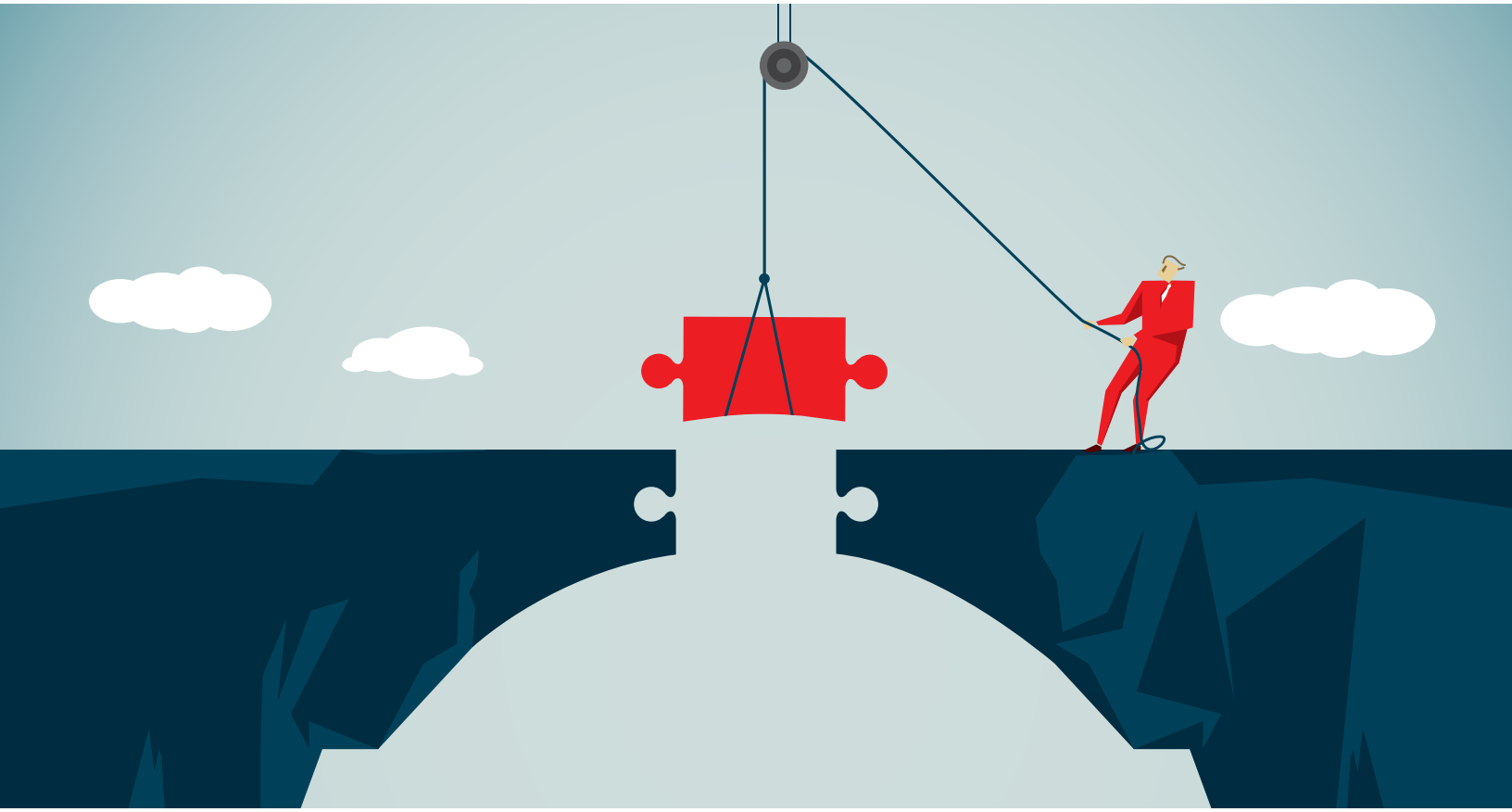
You'll build even more resilience and adaptability if you start going beyond EHS management and build Environmental, Social and Governance (ESG) maturity. Research shows that companies with better ESG performance, as measured by key indicators like management and reduction of greenhouse gas (GHG) emissions, energy management, and processes to choose safer and more sustainable chemical ingredients, also have higher profitability and less exposure to business-disrupting events like chemical spills. For the best chance of success, look for a software platform that offers an ESG solution in addition to EHS software. You'll have an easier time staying agile if your tools are agile, too.

Conclusion

Obstacles come in all sizes: from speed bumps to hurdles to full-on roadblocks. However, when it comes to EHS & ESG software, the determining factor for a successful purchase is not the size of the obstacles, it is the commitment and tenacity of those pushing for change. At times, it can feel like a lonely, uphill road, but it's a road EHS professionals are uniquely capable of navigating.

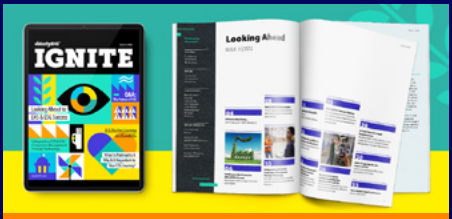
However, with VelocityEHS you never have to go it alone. We're committed to partnering with you on the journey towards reaching your EHS & ESG management goals. So, if you find yourself at a dead-end, phone a friend. Don't wait until the opportunity has passed, or until you've reached your breaking point. Keep us in the loop no matter what is happening, and you'll find out just how strong an advocate we can be for you.

As mentioned above, having a strong EHS management program in place is the foundation to building ESG maturity, providing less volatility and a more secure financial future. ESG is a growing trend in the EHS world. In addition to mastering your EHS management program VelocityEHS can help you start building and maturing your ESG program. We're here to help.



Looking for Additional Resources?

VelocityEHS has a large library of EHS & ESG resources to help you build on your EHS management and mature your ESG program.



***Ignite* Magazine**

Ignite Magazine—Thought Leadership and Insights from Velocity EHS Experts

VelocityEHS is proud to offer our digital magazine, ***Ignite***, to provide you with timely EHS and ESG expertise and resources.

Infographic

EHS & ESG Journey Infographic

Take an easy self-assessment to gauge your progress and gain insight on how to move forward and keep momentum going. This **infographic** will help you gain a clear picture of how to be safer and more sustainable.

Guide **Webinar**

An Overview of ISO 14001: Using the Standard to Improve Environmental Management

EHS managers eager to learn more about how an EHS/ESG management system patterned on ISO 14001 can help them establish a solid foundation in environmental compliance and advance their progress toward ESG maturity should download our guide, **An Overview of ISO 14001: Using the Standard to Improve Environmental**.

Webinar

Weathering the Storm: How ESG Maturity Helps You Maintain EHS Compliance in Challenging Times

Many discussions of Environmental, Social and Governance (ESG) correctly talk about benefits like operational excellence, return on investment (ROI), and positive brand identity, but those can seem remote to the average EHS professional struggling to maintain compliance with EHS regulations. Perhaps you're one of the many EHS professionals wondering how ESG can benefit you, and how to pursue ESG maturity starting from a current focus on regulatory compliance. Check out our **webinar**.

About VelocityEHS

VelocityEHS is the largest and fastest-growing cloud EHS & ESG solutions provider in the industry, with more than 18,000 customers and more than 10 million users. VelocityEHS is a recognized leader in the EHS & ESG management software industry, delivering technology solutions that allow firms of all sizes, all across the globe, to meet their EHS & ESG challenges with greater speed and simplicity. VelocityEHS offers award-winning management solutions to help you more quickly and easily meet your EHS & ESG goals, as well as ongoing training and customer success services to ensure that your users can take full advantage of its extensive capabilities.

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