



# Australia's Leader in Transport Fuel Manages Risk and Incidents with EHS Software from SAI Global

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 minimize the risk of incidents and their reoccurrence, and maximize 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, the EHS software from SAI Global enabled the company to make customised forms 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 organization for minimal disruption.
- **LOSS PREVENTION:** A licensed incident investigation process commonly used by oil and gas industry companies.

Since Caltex was already using SAI Global's solution for Risk Management and its Management of Change program, extending the platform's functionality to their Loss Prevention System was a natural progression. The 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 centralized within SAI Global's EHS solution.

## WHY SAI GLOBAL

Caltex's relationship is a partnership with SAI Global - not the typical vendor relationship. Caltex works with SAI Global to maximize 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 new software releases. Caltex acknowledges that improvements are not project-based, but continuous. They plan to take advantage of all enhancements and upgrades from future EHS software releases from SAI Global.

In 2016, Caltex implemented a Continual Improvement program based on quarterly cycles. Throughout the year they prioritize 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.

# 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 categorized by modules, then by actions – consistent with the Risk Management and Management of Change programs.

According to Amy Miliauskas, Caltex OE Systems and Technology Specialist, "By implementing these processes, we've been able to ensure there is consistent tracking and completion of actions, which minimizes 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 the new solution as shown in the table to the right.

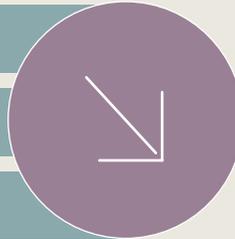
Caltex is also able to better manage geographically dispersed teams, as shown in their reduction in Open and Overdue action items with the implementation of the weekly summary reports.

## 80% REDUCTION ON 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



## SEPTEMBER 2015 MONTHLY STATS

### PRIOR TO SAI GLOBAL'S SOLUTION

<b>40</b>	Loss Investigations
<b>148</b>	Near Loss Investigations
<b>1068</b>	Loss Prevention Observations
<b>36</b>	Report Only

## NOVEMBER 2015 MONTHLY STATS

### 1 MONTH AFTER SAI GLOBAL'S SOLUTION

<b>58</b>	Loss Investigations
<b>166</b>	Near Loss Investigations
<b>1011</b>	Loss Prevention Observations
<b>38</b>	Report Only

## About SAI Global

At SAI Global, we help organizations proactively manage risk to achieve business excellence, growth, sustainability and ultimately, create trust.

Our integrated risk management solutions are a combination of world-class tech platforms, services and advisory capabilities that operate across the entire lifecycle allowing businesses to focus on opportunities presented by uncertainty. Together, these tools and knowledge enable

customers to develop a holistic, integrated view of risk. In Australia, we are also a leading provider of settlement-related services; company, personal and property information.

SAI Global's head office is located in Chicago, Illinois. We employ more than 2,000 people across 28 countries and 51 locations across Europe, the Middle East, Africa, the Americas, Asia and the Pacific.

To find out more visit [www.saiglobal.com](http://www.saiglobal.com)