

Workshop 3A

Direct Works Pilot Project Challenges & Results

Speaker: Peter McAteer, Sysmax

Chaired by: Simon Lowe

Room: A



NHMF
Maintenance
Conference
2023



Agenda

1. Three Disasters – One Regulatory Theme
2. The Challenges presented by Grenfell / Hackett / Building Safety Regulations – Debbie Carlton
 - Supply Chain & The Golden Thread
3. Benchmax Architecture
4. Combined Pilot Project Summary (Mears / Berneslai / Karbon / Bernicia / Citizen / Places for People)
5. Opportunities
 - (upskilling / retention / career development / efficiency / cost reduction)
6. Social Housing Company's Summaries of the Pilot Project
7. Audience Participation Encouraged

Three Disasters - One Theme

Regulator & Stakeholder Response:

Prove Competency & Compliance with Best Practice



Piper Alpha 1987

- 167 Lives Lost
- Transformational for the UK oil and gas sector
- 1996 Cullen Enquiry



Deepwater Horizon 2010

- 11 Lives Lost
- Largest environmental oil spill in history
- Almost the largest corporate collapse in history



Grenfell 2017

- 72 Lives Lost
- Transformational for the construction sector
- Hackett Report & Building Safety Regulations

TRACK RECORD

Successfully audited many times (HSE / BEIS)

Sysmax drives day-to-day competency & compliance to improve performance since 1996

- Places for People
- Citizen
- Berneslai
- Bernicia
- Karbon
- Mears
- ExxonMobil
- Total
- Neptune Energy
- Premier Oil
- Repsol
- CNOOC



BP Wind Energy



PEPSICO



**NHMF
Maintenance
Conference
2023**

<https://www.sysmax.com/case-studies>



The Challenge

Debbie Carlton - Dynamic Knowledge



The Golden Thread – Higher Standards for all Stakeholders

Design, construction, operation, and management of buildings that are 18 metres or 7 stories and above

- Accurate and Trusted Evidence (Verified)
- Security of Residents
 - Accountable Persons, Duty holder and Building Safety Managers
- Culture Change:
 - Increased competence, capability, working practices, processes, and information management and control
 - Enabler for better collaborative working
- Single Source of the Truth
- Secure
- Accountable (Changes by whom and when)
- Simple to Access
- Longevity and Shareability of Information
- Relevant/Proportionate



What is Benchmax?

A digital tool that ensures the company and its people are compliant, efficient, and safe.



**NHMF
Maintenance
Conference
2023**

Benchmark – Step 1

Build The Shared Compliance & Competency Library

Current Content

- Job Descriptions
- Training Records
- Task Lists
- Policies
- Procedures
- Guidelines
- Manuals
- Training Documents
- Videos
- Supplier Guides
- Etc..



Framework Compliance

13 Competence WGs
PAS 8671-3
Flex 8760v3
Level 2 & 3
Apprenticeships
Retrofit Academy
Installers Competence Report



Compliance Checks

Procedures

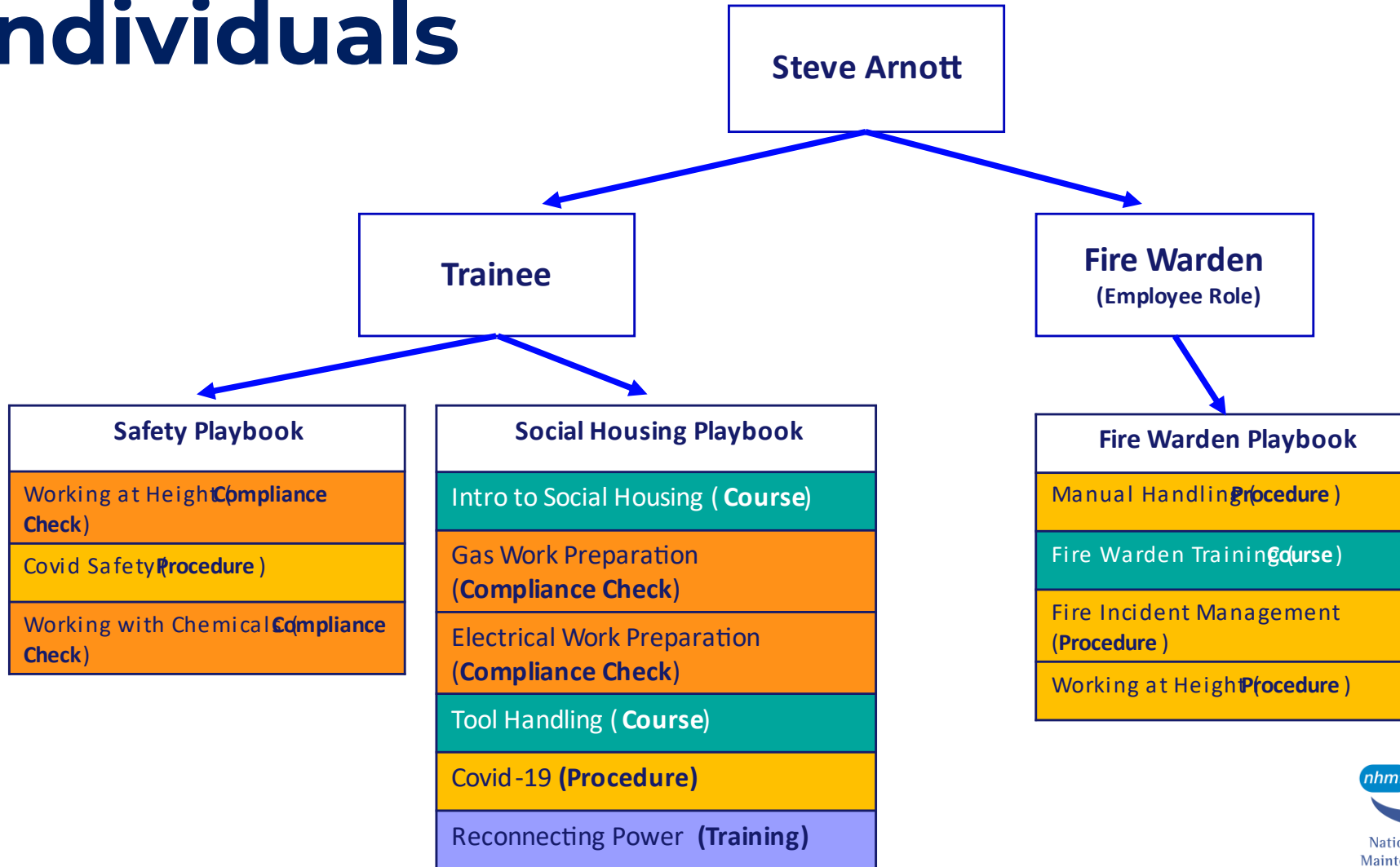
Courses

Training / Guidance



Benchmax – Step 2

Assign Roles & Playbooks to Individuals



Benchmax – Step 3

- Monitor and report performance
- Identify strengths and weaknesses
- Drive performance improvement

The screenshot displays the Benchmax software interface, which is used for monitoring and reporting performance across multiple sites. The interface is divided into several sections:

- Reporting Section (Top Right):** Shows a 'Generated Report - 24 Users' table with columns for Name, User Shift, Employer, Content Category, Item, Version, Completeness, Coverage, Expires, Status, and Options. The table lists various users and their compliance status for different items.
- United Kingdom Sites Overview (Middle Left):** A dashboard showing compliance metrics for various sites across the UK, including Bristol, Newcastle-upon-Tyne, Glasgow, Central North Sea, Birmingham, Bracknell, Food Preparation Site, and Liverpool. Each site has a summary of compliance checks and action items.
- Map (Middle Right):** A map of the United Kingdom with numbered markers indicating the locations of the sites.
- Electrical Compliance (ED) Report (Bottom Right):** A detailed report for 'Electrical Compliance (ED)' showing compliance metrics for various electrical systems (e.g., 2.1-Low Voltage Power Generation and Distribution, 3.1-High Voltage Power Generation and Distribution, etc.). The report includes a table with columns for different electrical systems and their compliance status.

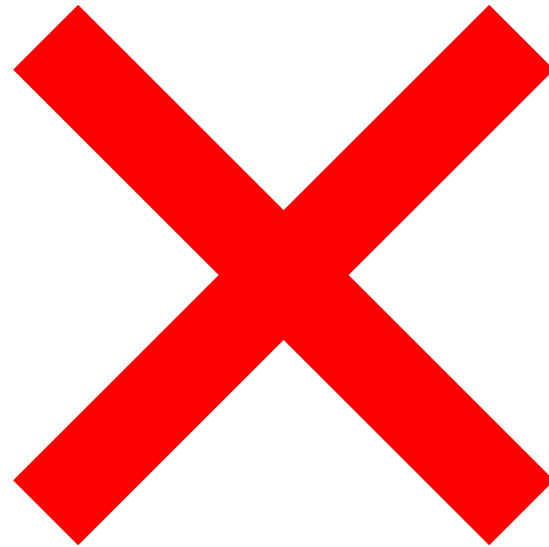
Messaging: **Benchmax** **supports you as you work**

Playbook in your pocket



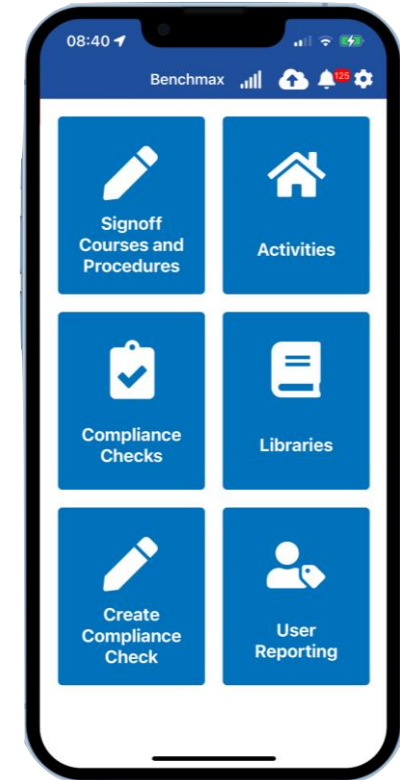
NHMF
Maintenance
Conference
2023

It's Not About You!



What does it mean for you?

- Demonstrates your competency
- Provides quick and easy access to key files
- Helps you improve your skills
- Enables you to prove your competency to the HSE and Social Housing Regulator (SHR)
- Gives you access on any device at any time to the following:
 - Training materials
 - Best practices
 - Company procedures
 - How-to documents
 - SOP / SWPs
 - Demonstration videos



It's About The Company!

- Nobody knows everything
- We operate as teams
- We need to know the team's strengths and weaknesses

- Then we can create better teams
 - Upskill / multi skill / retain people / develop skills
 - Protect Jobs – increase efficiency / reduce cost
- By focussing training and development
- By placing best practice in the hands of the workforce

Benchmax Benefits

For Operatives

- Efficient, smooth working on the job
- Playbook & Library in your hand
- Upskilling, multi-skilling and growth opportunities
- Proof of competency
- Team safety assurance

For Assessors

- Assure performance with efficiency
- Ensure the right person does things right
- Simplified oversight and compliance in the workplace
- Progress tracking in real-time

For Management

- Enhanced visibility and insight
- Flexible, efficient workforce management
- Meet stakeholder's expectations
- Improve performance through compliance and competency

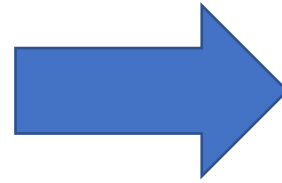
Turns Inactive Procedures Into Dynamic Compliance Checks

Procedure

EMPLOYEE RISK PROTECTION			
SAFE WORKING PRACTICE			
SWP No	Procedure	Version No	Issue Date
SGK-001	SAFE USE OF STEP LADDERS	1.3	12 Jan 2021

- To prevent injuries to Employees
- To prevent damage to equipment
- To ensure a safe working environment
- In accordance with GEHSM

STEP	BLACK TEXT FOR INSTRUCTION RED TEXT FOR KEY SAFE BEHAVIOUR	ILLUSTRATION
1	Check steps and ladders have an in date safety tag before use. CHECK STEPS ARE CLEAN AND FREE FROM DEBRIS	
2	Ensure all legs are level and secure. NEVER USE STEPS OR LADDERS UNLESS THEY ARE ON A SOUND, LEVEL SURFACE.	
3	When available ensure the wheel locks are used to secure steps in place. THIS WILL STOP THE STEPS FROM MOVING.	
4	LADDERS SHOULD BE SECURELY FIXED TO THE APPROPRIATE HOOKS/FIXING POINTS AND MUST BE PADLOCKED AWAY AFTER USE.	
5	Maintain 3 points of contact when ascending and descending the equipment. Always use one step at a time and never rush. THIS WILL PREVENT FALLS FROM HEIGHT	



Compliance Check

- Procedures categorised into bite-sized requirements
 - Easily followed
 - Results measured
- Provides guidance on how to complete a requirement
- Captures evidence of requirement completion

Select a compliance check: Jayne Cobb - Safe Use Of Step Ladders Coverage: 58% Compliance Template: 37% Compliance Template Used: Safe Use Of Step Ladders Compliance Check Description & Notes: Click to view details

[Return to Data Entry \(Sign-off Compliance\)](#) Automatic - This Compliance Check will auto complete on 100% coverage

Compliance Check Overview and Navigation
Drill down by clicking on Category headings

Section Name	Coverage	1	2	3	4	5
1 - Verifying Ladder Safety 2 Requirements	100%	Assessor: 50%	Operator: 50%			
2 - Leg Stability 1 Requirement	100%	Assessor: 100%				
3 - Wheel Locks 1 Requirement	100%					
4 - Storing Ladders 2 Requirements	0%					
5 - Climbing and using ladders 4 Requirements	75%	Assessor: 20%	Operator: 100%			
6 - Hazard Awareness 2 Requirements	0%					

Requirements Belonging to 5 - Climbing and using ladders
Below is the list of requirements that belong to the category you have selected.

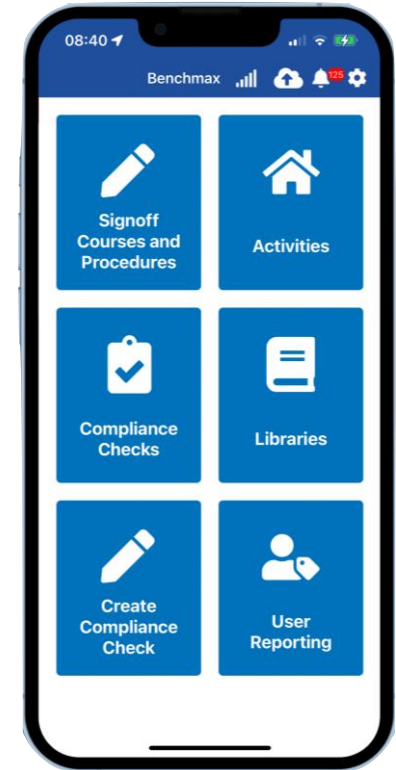
Requirement	Response:	Notes:
1. The operator demonstrates they have maintained 3 steps of contact when ascending and descending the equipment.	60% Regular Conformance Operator: Yes, 100% Full Conformance	
2. The operator always uses one step at a time and does not rush whilst ascending the ladder	No. Non-Conformance Operator: Yes, Full Conformance	Workers were observed to climb up ladders in haste
3. Only one worker is ever on the steps or ladder at any one time.	No. Non-Conformance Operator: Yes, Full Conformance	Multiple operators were observed climbing on a ladder at the same time.

Uploaded Evidence:

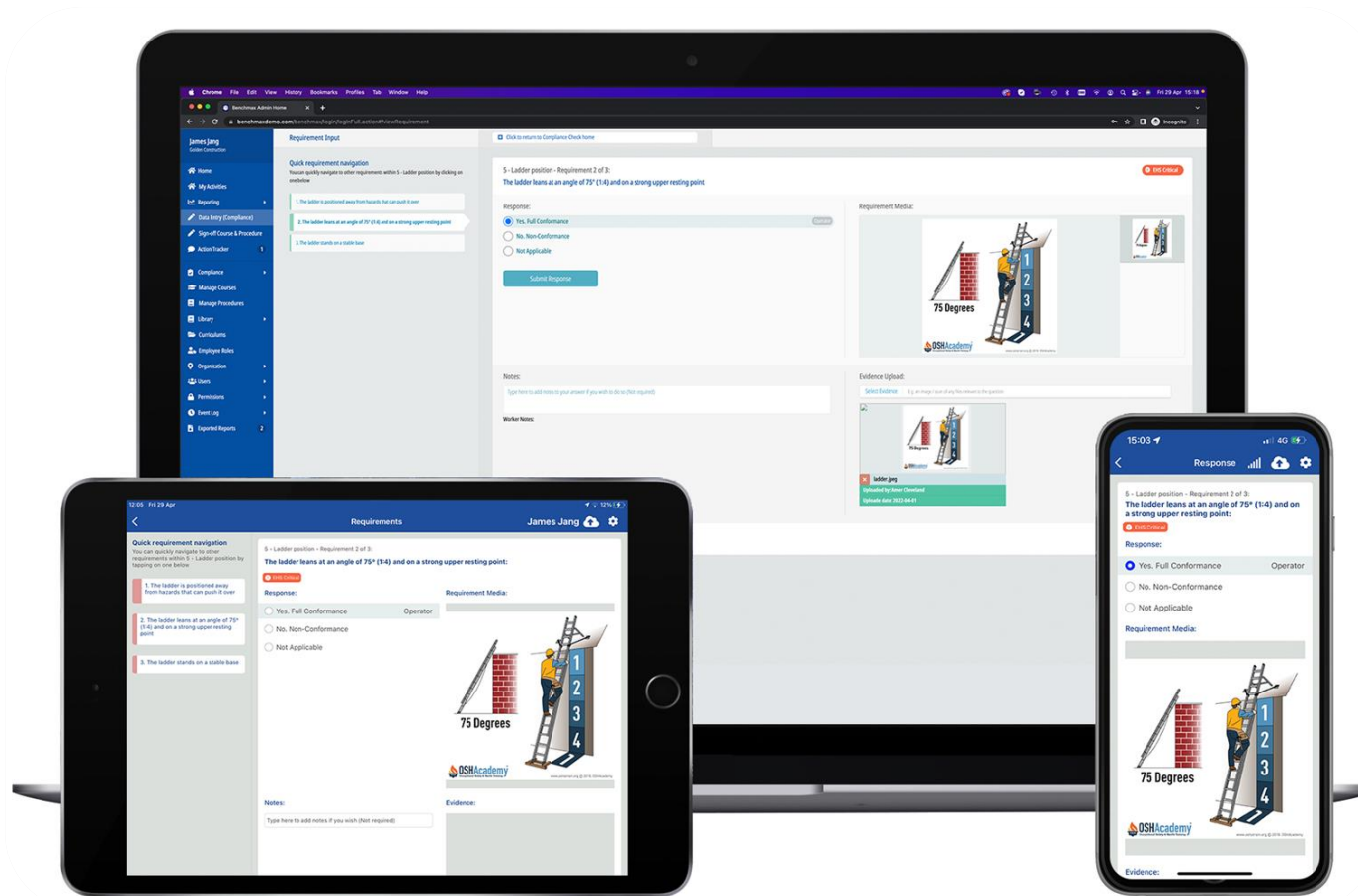
811161046L_AC_S41500.jpg
UPLOADED BY:
UPLOAD DATE:

Key App Features

- Sign-off Courses and Procedures
 - SWP, SOP, Toolbox Talk and compliance signature capture
- Compliance Checks
 - Procedures are broken down into requirements + evidence capture
- Create Compliance Check
 - Assign compliance templates on the fly to workers
- Activities
 - Daily, weekly, monthly tasks, roles and completion information
- Libraries
 - Playbook in your pocket.
- User Reporting



Any Device - Online and Offline



Platform Dashboard

Iqbal O'Brien
PepsCo

- Home
- Map Reporting
- Site Reporting
- Data Entry (Validations)
- Sign-off Course & Procedure
- Action Tracker 7
- Validations
- Manage Courses
- Manage Procedures
- Library
- Curriculums
- Employee Roles
- Organisation
- Users
- Permissions
- Event Log
- Exported Reports 28

My Account
Help Files
Change Locale
Terms & Conditions
Log Out

Iqbal O'Brien (291)
Sysmax Only (Staff)
Sysmax Limited

Location

Country
United Kingdom

Site
Country Wide

Best Practice Library Breakdown

49.8% 39.5%

Validation Template Courses Procedure

Active Best Practice Items

53.4% 38.9%

Validation Checks Courses Procedure

Active Best Practice Items (Completed)

57.6% 37.5%

Validation Checks Courses Procedure

Location Statistics

1,139	Users
95	Roles
7	Sites
29	Assets

Set up your Organisation

- ✔ **Manage Sites**
Create locations that your organisation operates within.
[Manage Sites](#)
- ✔ **Manage Assets**
Create locations that your organisation operates within.
[Manage Assets](#)
- ✔ **Manage Shifts**
Create Shifts to provide further categorization for your workforce.
[Manage Shifts](#)
- ✔ **Manage Employee Roles**
Create job roles to assign to your users.
[Create Employee Role](#)
- ✔ **Set up User Accounts**
Add new Benchmark user accounts for your organisation

Set up Best Practice

- ✔ **Manage Courses**
Set up training records for your organisation.
[Manage Courses](#)
- ✔ **Manage Procedures**
Set up training records for your organisation.
[Manage Procedures](#)
- ✔ **Create & Publish Validations**
Create competency items to assess your workforce against.
[Manage Validations](#)
- ✔ **Build Curriculums**
Combine Courses, Procedures and Compliance Templates to create learning and assessment modules.
[Manage Curricula](#)
- ✔ **Assign Curriculums to Roles**

Review Performance & Take Action

- View Organisation Competency**
See an overview of your organisation's competency.
[Map Reporting](#)
- View Compliance Risk**
Analyse the competency of your workforce and find areas of concern.
[Site Reporting](#)
- View Compliance Check Reporting**
View how your organisation is performing against specific compliance templates.
[Compliance Reporting](#)
- View Action Tracking**
View, create and assign actions to close competency gaps.
[Action Tracker](#)

Support / Training / Guidance at Point of Action

BDM Auditor
Symax Limited

Select a validation check: **Dougal Salvador - Electrical Compliance** Coverage: **100%** Validation: **89%** Validation Used: **Electrical Compliance (UK)** Validation Check Description & Notes: [Click to view details](#)


Validation Check Overview and Navigation
Below you can see the overall scores and progress for categories in this Validation Check with the ability to drill down

Section Name	Coverage	1	2	3	4	5
1 - Company Electrical Procedure 13 Requirements	100%	Assessor: 82%	Operator: 89%			
1.1 - Company Electrical Procedure - 1 5 Requirements	100%	Assessor: 92%	Operator: 92%			
1.2 - Company Electrical Procedure - 2 5 Requirements	100%	Assessor: 80%	Operator: 80%			
1.3 - Company Electrical Procedure - 3 3 Requirements	100%	Assessor: 67%	Operator: 100%			
2 - Low Voltage Power Generation and Distri... 14 Requirements	100%	Assessor: 93%	Operator: 100%			
3 - High Voltage Power Generation and Distri... 6 Requirements	100%	Assessor: 100%	Operator: 83%			
4 - UPS Systems 9 Requirements	100%	Assessor: 78%	Operator: 100%			
5 - DC Systems 7 Requirements	100%	Assessor: 100%	Operator: 86%			
6 - Hazardous Area Electrical Equipment 7 Requirements	100%	Assessor: 86%	Operator: 43%			
7 - Navigation Aids 7 Requirements	100%	Assessor: 100%	Operator: 86%			
8 - Electrical Documentation 7 Requirements	100%	Assessor: 86%	Operator: 86%			

Requirements Belonging to 1.1 - Company Electrical Procedure - 1
Below is the list of requirements that belong to the category you have selected.

Requirement
1. Performance deploying electrical procedure application

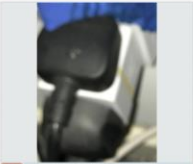
Response:
Highest - 5
Operator: Highest - 5

Uploaded Evidence:

expired meter.jpg
Uploaded by: Dougal Salvador
Upload date: 2022-01-13

Requirement
2. Conformance in use of electrical procedures

Response:
60% Regular Conformance
Operator: 60% Regular Conformance

Supporting Answers:
 Domestic Electrical
 Installation Electrician
 Instrumentation Electrician
 Maintenance Electrician

Uploaded Evidence:

overfilled adapter.jpg
Uploaded by: Dougal Salvador
Upload date: 2022-01-13

Support / Training / Guidance at Point of Action

16:08 Tue 25 Jan

Requirements BDM Auditor

Quick requirement navigation
You can quickly navigate to other requirements within 1.1 - Company Electrical Procedure - 1 by tapping on one below

- 1. Performance deploying electrical procedure application
- 2. Conformance in use of electrical procedures
- 3. Performed planned maintenance routines in accordance with maintenance procedures.
- 4. Qualified on Electrical Verification Scheme related to safety critical elements.
- 5. Is aware of electrical safety codes.

1.1 - Company Electrical Procedure - 1 - Requirement 2 of 5:

Conformance in use of electrical procedures:


Response:

- Yes. 100% Full
- 80% Systemic
- 60% Regular Conformance
- 40% Inconsistent
- 20% Partial Conformance
- No. 0% Non-Conformance
- Not Applicable

Supporting Answer:

- Domestic Electrical
- Installation Electrician
- Instrumentation Electrician
- Maintenance Electrician

Requirement Media:



Notes:
Type here to add notes if you wish (Not required)

Other:

Evidence:
Select evidence

Actions:
Add Action

Submit response

What Good Looks Like

Sign-off in Work Place

Action Tracker



NHMF Maintenance Conference 2023

Integrated Risk Management

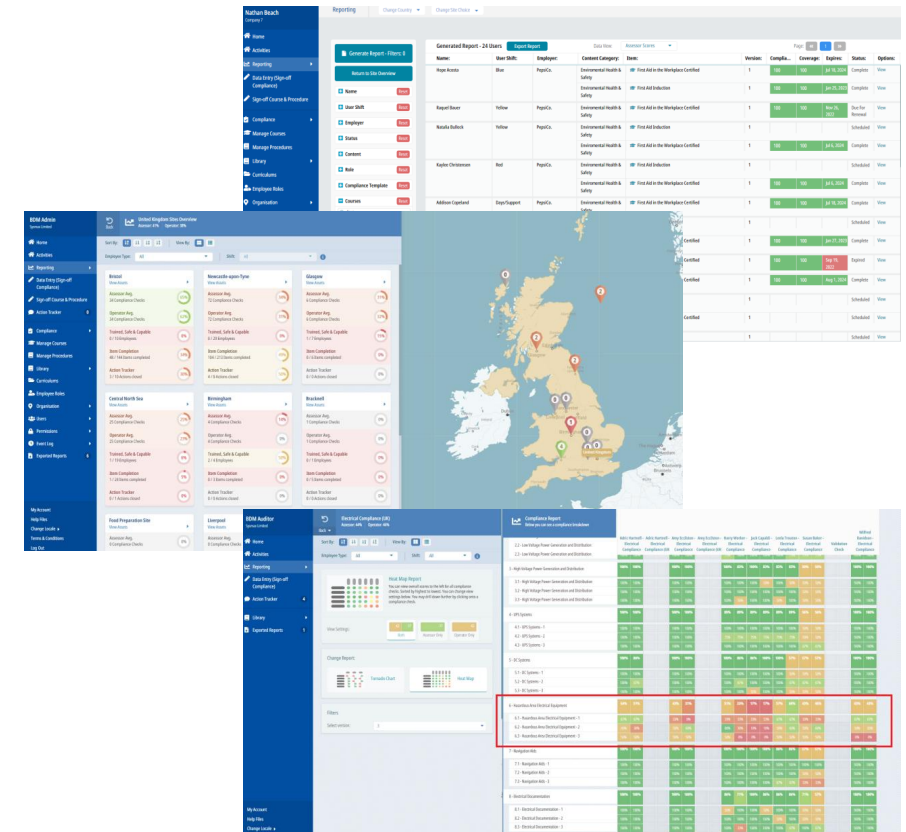
- Implications of not performing key tasks
- At the point of action

- Probability of Occurrence
- Impact of Occurrence
- Risked Impact



Benchmax Desktop View

- Enhanced and multiple reporting options
- Aggregate data of all locations in one place
- Global reporting on one screen
- Ability to manage (edit, upload or create) reference materials
- Permission level access to suit your organisation
- Deep search capability for key skills and team improvement





Direct Works Members' Feedback



**NHMF
Maintenance
Conference
2023**

Pilot Members – Roles & Challenges

Role / Challenge		Member Lead
Joiners		Berneslai
Bricklayers		Bernicia
Roofers		Karbon Homes
Plumbers		Citizen
Asbestos		Bernicia
 Fire-Safety	Supply Chain / Golden Thread	Mears 
Gas Engineers	<i>Previous</i>	Places for People
Electricians	<i>Pilot</i>	Places for People

Pilot Project Member Comments

Features

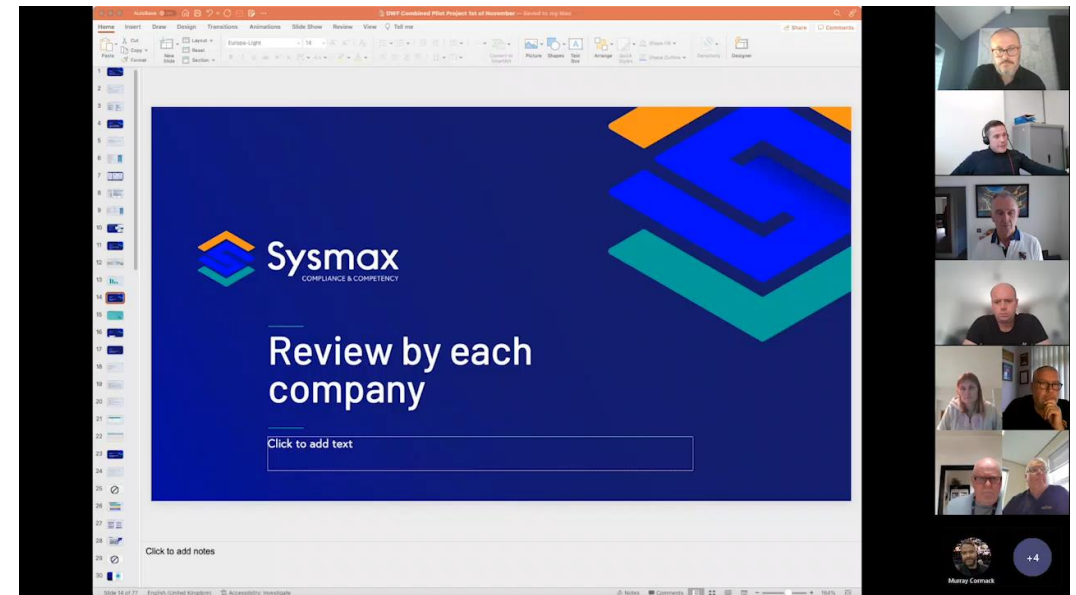
- Reporting – From Nation to individual in a few clicks
- Curricula capture multiple competency needs, simply
- Access restriction of the data based on permission profiles
- Notification Feature on assignments and expirations and Expiration Lead Time
- Evidence capturing on Benchmax
- The offline Playbook (Library)
- Explaining a job through media files (videos, photos and documents) in Library

Benefits

- Proof of competency and compliance 24/7
- Efficiency improvement
 - Get it right, first time
 - Reduced admin overhead
 - Video / photo / documents to hand
- Potential ability to cover several management systems in one place:
 - Competency
 - Risk
 - Compliance
 - Document

Pilot Member Feedback

- “You can't really fault it in having a centralised location for overseeing competency and tracking activities on a daily basis.”
 - **Jonathan Fletcher**
 - **Director Pre-Tenancy & Property Services**
 - **Karbon Homes**
- Found the system useful
- Liked the idea of having everything in one centralised location
- Found it easy to recall the information as and when needed



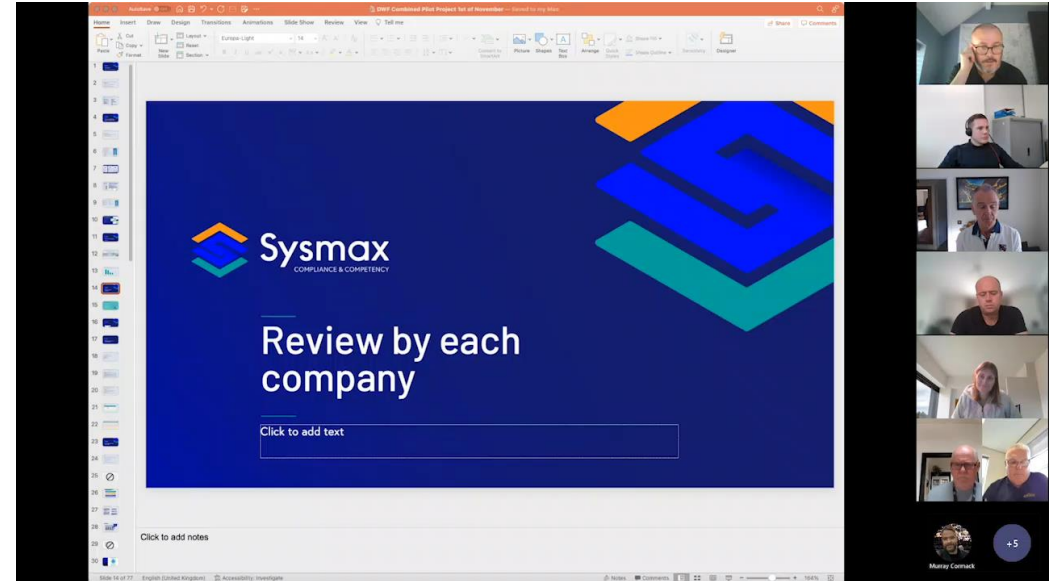
karbon
homes

nhmf
National Housing
Maintenance Forum

**NHMF
Maintenance
Conference
2023**

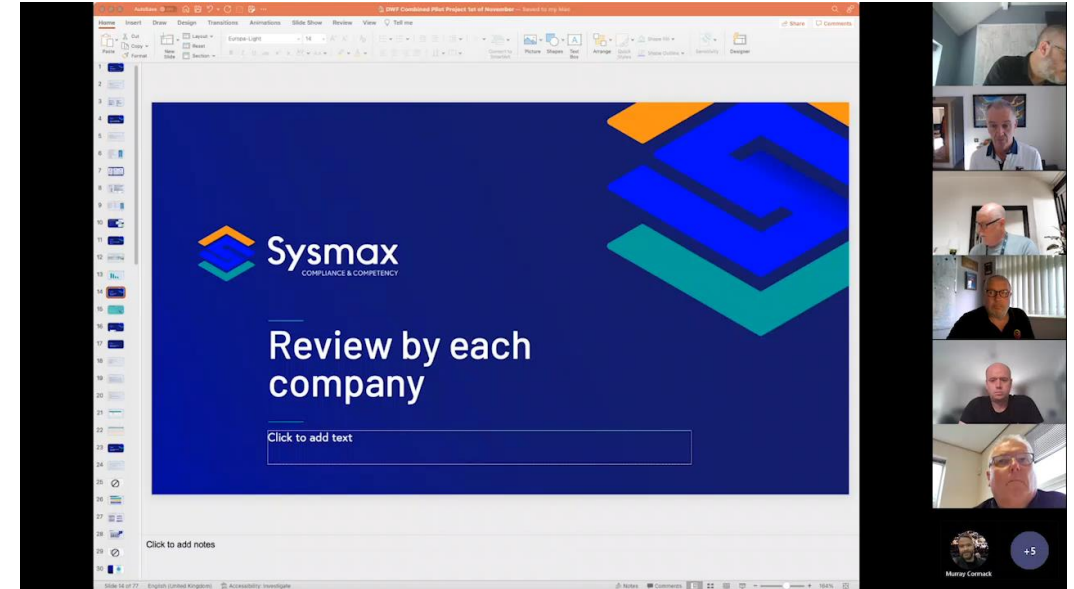
Pilot Member Feedback

- “Does what it says. It looks good. It feels good.”
 - **David Polhill**
 - **Head Of Maintenance**
 - **Citizen**
- Agrees with Jonathan.
- Benchmax is straightforward
- Lisa Robertson
- Head of Learning and Development



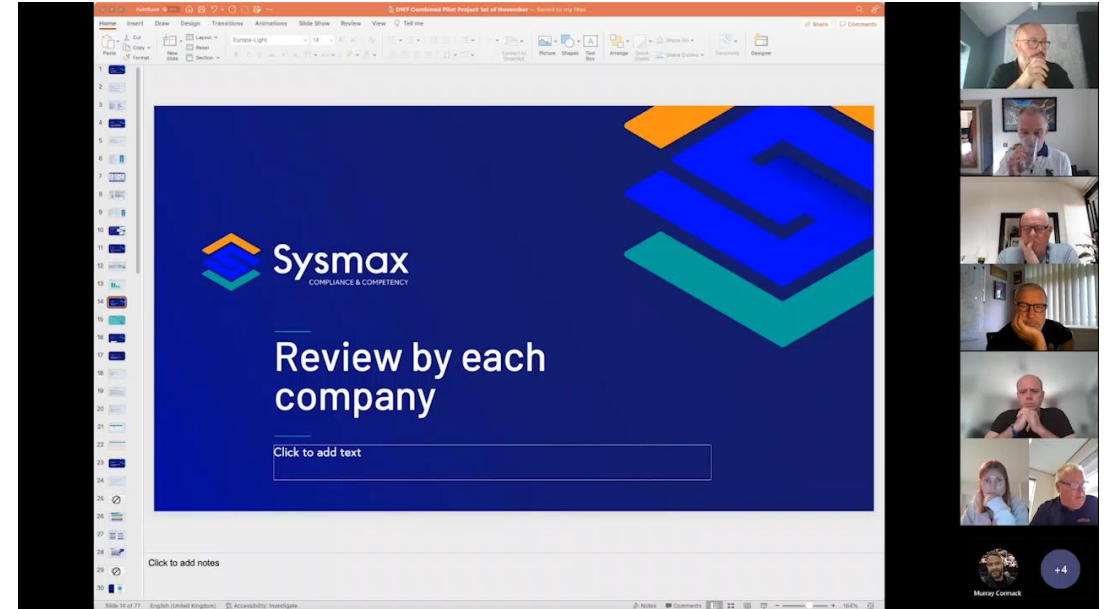
Pilot Member Feedback

- “We do like the system and the opportunities it gives us.”
 - **Heather Hughes**
 - **Head of Learning**
 - **Mears Group**
- Use Benchmax for these purposes:
- Delivery of ProQual Fire Door Safety Training Installation Qualifications
- Learning and training aid
- Demonstrating competency and compliance



Pilot Member Feedback

- “Excellent system. We’ve had really good feedback from all the Heads of Services and the colleagues as well.”
 - **Kieran Cannon**
 - **Head of Maintenance Ops**
 - **Bernicia Group**
- A lot of team leaders’ responsibilities will be dealt with through the system



BERNICIA
HOMES

nhmf
National Housing
Maintenance Forum

**NHMF
Maintenance
Conference
2023**

Pilot Member Feedback

- “From initial contact through to pilot implementation, the vision of what the system will achieve is inspirational.”
- “The additional features of the system over and above demonstrating competencies are so beneficial to an organisation that have multi-trade craft operatives.”
- “Mandatory tasks that can be applied such as Toolbox Talks, Training and Development and on-site training are such valuable assets in organisations such as ourselves.”
- “Great system and we would encourage all those in our sector to take advantage.”
 - **John Lees**
 - **Senior Operations Manager**
 - **Berneslai Homes**



NHMF
Maintenance
Conference
2023

Thank you.

Email - peter.mcateer@sysmax.com

Phone - +44 (0) 7713149579

See you at the
next conference!



**NHMF
Maintenance
Conference
2023**