

CASE STUDY

# World's Largest Caterpillar Dealer Uses Award-Winning QHSE to Reduce Site Safety Inspection Time by **93%**

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Finning Streamlines Health and Safety Processes with ComplianceQuest's Audit and Inspection Solutions

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—*Adán García Terán, Project Manager*

## Background

Finning is the world's largest dealer of Caterpillar construction equipment and heavy machinery. Headquartered in Vancouver, Canada, they employ nearly 13,000 people worldwide with locations in Western Canada, South America, the UK, and Ireland. Founded in 1933, Finning sells, rents, and provides parts and service for equipment and engines in industries such as mining, construction, petroleum, and forestry and a wide range of power systems applications.

# Challenge

As a Project Manager for Finning, Adán García Terán leads various initiatives for adopting new technologies, systems, and applications. He also ensures that existing applications, such as Salesforce and SAP, are running at prime operational efficiency for the organization.

One of Finning's top priorities is workforce safety, and in 2019, a business need was identified to improve site safety audits by adding a more modern and efficient tool to streamline the process.

"We have high standards and well-established processes, but because everything was manual, it took too long to close the loop on safety issues," said Terán. "By the time a safety audit was completed, it could take up to two weeks before it was closed out and we had no visibility throughout the process."



*"They have significant features and capabilities that can actually change your life."*

— **Adán García Terán**, Project Manager

Safety auditors, who visit different sites to inspect safety and compliance, are often in remote locations for several days with no internet access. Data is captured onsite in Microsoft Excel and then, once an internet connection is available, is uploaded into an in-house report generator and finally published.

"Minutes are life," said Terán. "We needed to speed up and automate the process as immediate action may be needed to correct a safety or compliance issue."

# Solution/Results

A search began for a Salesforce-compatible solution, and in December of 2019, after reviewing several vendors, they chose ComplianceQuest, a quality, health, safety, and environment management system (QHSE) built on the Salesforce platform.

“During the demo, we were really impressed with the reporting, offline capabilities, and improved visibility we would have throughout the audit process,” said Terán. “They met all of our requirements including the ability to configure the application to our needs.”

## From Two Weeks to One Day—Just Like Magic

ComplianceQuest was rolled-out across all locations worldwide and configured specifically to work in

on- and off-line situations. According to Terán, once the new system was in place, there were two options available for the site safety auditors. First, if they have internet connectivity, everything the auditors need is at their fingertips. They can generate reports in real-time based on the necessary indications with a click of the mouse.

Alternatively, if the auditors are in a remote location without internet access, the application creates a draft, which is saved until they get back to their office or are near Wi-Fi. All the auditor needs to do is click “sync” and the applicable reports are generated.

“It’s just like magic,” said Terán. “Our audit time used to take up to two weeks and now it takes just a day or less.” The QHSE management solution helped to streamline the entire process, resulting in a 93% time savings.

### CHALLENGES

- Paper-based site safety auditing system
- Offline limitations in remote locations
- Time-delayed reporting capabilities
- Limited visibility during auditing process

### VALUE CREATED

- Transparent site audit process
- Versatile, multilanguage reports
- Cloud-based with offline capabilities
- Increased proactiveness for safety issues

### SOLUTIONS

- QHSE
- Audit
- Inspection

## Versatile, Multilanguage Reporting

“ComplianceQuest is really versatile in terms of reporting,” noted Terán. “We can generate reports by audit processes and see all of the corrective actions that need to be taken at the site the audit was performed.”

Directors can then send the report data, which is available in both English and Spanish, to the applicable site to apply corrective or preventive actions when and where needed.

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—Adán García Terán, Project Manager

## The Beauty of the Salesforce Platform

Terán, who is a big believer in the Salesforce platform, said, “We can connect many different systems and get more solutions by using the same platform.”

As a result of working with ComplianceQuest, Finning has solved some very real auditing and inspection issues. Not only do they have a QHSE system that serves their needs today, but they have a platform that they can build upon for future growth.

“The success of our project started with ComplianceQuest listening carefully to what we wanted to achieve and offering solutions that would make us more proactive, efficient, and streamlined,” concluded Terán. “They have significant features and capabilities that can actually change your life.”



# About ComplianceQuest

ComplianceQuest is the fastest growing, 100% modern cloud Enterprise Quality and Safety Management System (QHSE) natively built and run on the Salesforce platform. Our unified QHSE solutions help our customers of all sizes deliver quality products and services in the safest, most sustainable way by mitigating risk, problems, and inefficiencies while protecting customers, employees, suppliers, and brand.

For more information, or to request a demo with a ComplianceQuest expert, contact ComplianceQuest today.

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