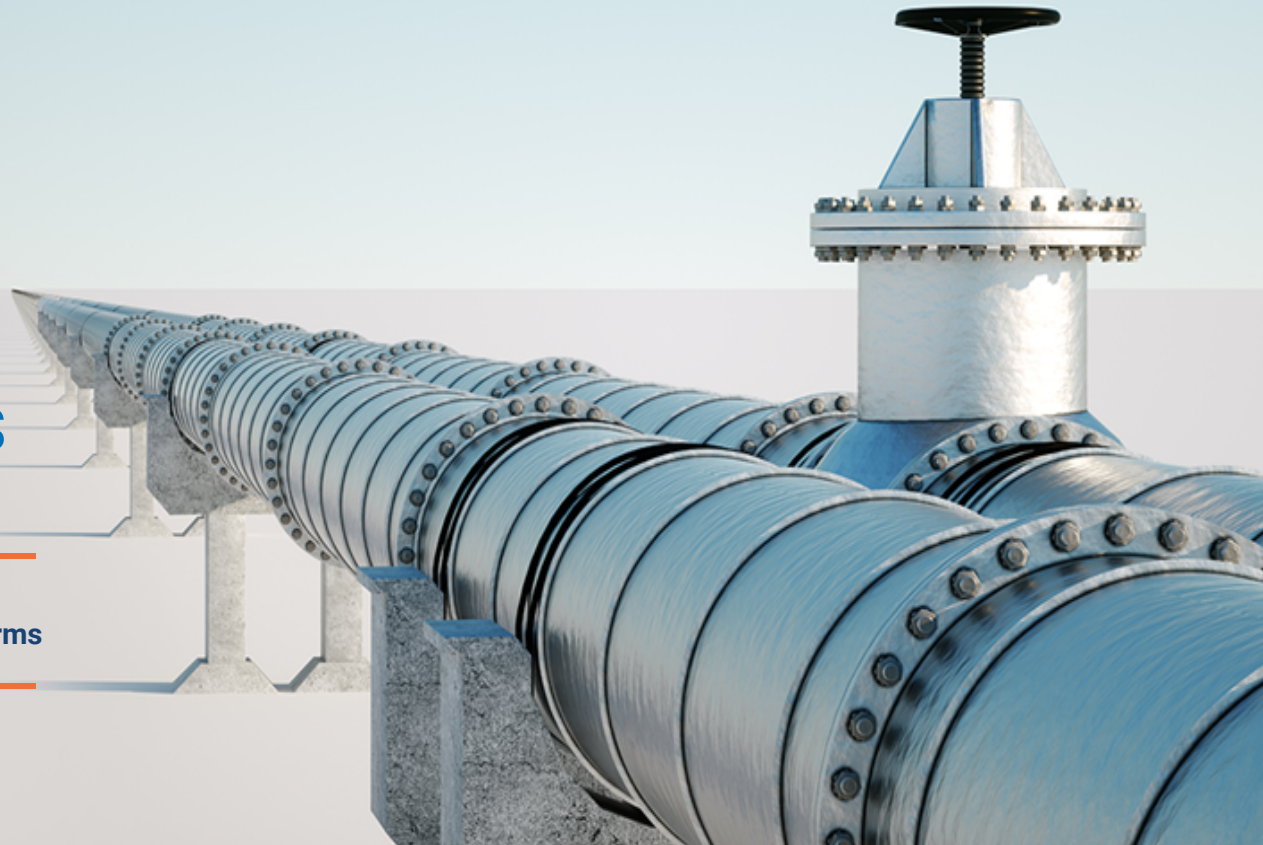


CASE STUDY

Canada's Leading Oil and Gas Solutions Provider Sunsets Legacy Systems, Deploys Improved Safety Process

**ComplianceQuest Helps ClearStream Replace Paper-Based HSE
Systems with Customized, Mobile-friendly Worksite Inspection Forms**



“It’s now easier to show that workers are aware of documentation, which is proof that our safety program is being implemented.”

— **Kurtis Chapman**, Competency Advisor



Background

ClearStream Energy Services Inc (ClearStream) provides solutions for the energy and Industrial markets including oil and gas, petrochemical, mining, power, agriculture, forestry, infrastructure, and water treatment. The company, which is headquartered in Calgary, Alberta, has locations strategically located across Canada and provides maintenance, construction, and environmental services for a diverse array of clients. Established in 1967, ClearStream is a publicly traded company that employs nearly 4,000 personnel throughout the country.



Challenge

ClearStream is an award-winning company dedicated to creating an environment of safety and quality for its employees and clients. When Yves Paletta, Chief Executive Officer, joined ClearStream in 2018, he brought with him a passion for enhancing business processes, which included making improvements to safety, technology, and operational procedures.

“Our leadership team has a very strong commitment to excellence and supporting a safe and healthy workplace,” said Kurtis Chapman, Competency Advisor, department of Health, Safety, and Environment (HSE). “As part of ClearStream’s continuous safety improvement initiatives, we recognized a need to replace our manual and paper-based safety inspection system with a more modern and scalable solution.”

The company began the search for a vendor that could transform its legacy systems to a simplified, mobile-friendly, and electronic process. This would allow site inspectors to submit safety data from any location, saving valuable time and resources. Seamless integration with Salesforce, which is utilized by the Business Development department, was an essential



Solution/Results

In 2019, ComplianceQuest, a Salesforce-native Enterprise Quality, Safety, and Environment Management (QHSE) solutions platform was chosen to facilitate the digital transformation.

Chapman, who was tasked with spearheading the implementation of the new system, was excited about the impact this would have on quality processes. “We conduct a multitude of safety inspections each year, ranging from site inspections to vehicle safety, and knew this could greatly streamline our efforts.”

Digitized Forms Transform Quality Processes

Energy services companies face many challenges, from international and environmental pressures to economic and political factors. As Western Canada’s top industry supplier and service provider for oil and gas, improving speed and scale would help the company ensure safety initiatives could be met on a more timely basis.

Prior to working with ComplianceQuest, ClearStream’s HSE (Health, Safety, and Environment) department was using Microsoft Office 365 and SharePoint to gather safety data. Field staff would fill out and submit handwritten

CHALLENGES

- Paper-based forms
- Manual, time-consuming processes
- Disparate systems
- Staff and processes impacted by pandemic

VALUE CREATED

- Simplified site safety data gathering processes
- Streamlined dashboards and reporting for audits
- Scalable HSE solution
- User-friendly form submission system

SOLUTIONS

- Digitized, custom site safety inspection forms

forms which would then be manually entered into Excel by the HSE team. This proved challenging on multiple levels. Staff could be working in remote locations or on forestry roads with little to no internet access, which made it difficult from a practical standpoint. From a management perspective, it was time-consuming and complex to collect and assemble critical safety information.

“ComplianceQuest created a completely customized program for us,” said Chapman. “They designed digital worksite inspection forms which could be easily accessed via mobile from virtually anywhere. The user-friendly forms automatically feed safety data into Salesforce, which can be accessed real-time.”



“ComplianceQuest helped us make our employees safer.”

— **Kurtis Chapman**, Competency Advisor

Resilience during Challenging Times

ClearStream offers a suite of more than 40 services and covers a wide range of territory from direct services and manufacturing to field services and oil sands mining. “Our business is complicated with many moving parts,” explained Chapman. “This new system has been incredibly beneficial, especially during the pandemic, which introduced unique challenges for everyone, both personally and professionally.”

With the onset of the pandemic, the roll-out and implementation was accelerated, which helped ensure that employees were safe. The ability to enter information electronically eliminated the need for personal contact, reducing concerns about possible exposure to the coronavirus.

“ComplianceQuest helped us make our employees safer,” noted Chapman. “By consolidating and simplifying HSE processes, our people are empowered to follow processes and procedures to ensure safety and compliance. This also frees up time for everyone to focus on higher leverage tasks.”

Testing Environment Proves Invaluable

ComplianceQuest provided a sandbox environment, which proved extremely useful to Chapman and the HSE team. The ability to safely explore, learn, and test a new system without the risk of affecting data is important through any product's life cycle—from development to implementation and maintenance. If there are issues, they can be reviewed to determine the root cause, and solutions can be devised and further tested for effectiveness. Once everything is working in the test environment, changes can be applied to the production system, which mitigates any risk.

"When you have a customized system, you're going to have to make changes, and that's a good thing—that's how you know you're doing a good job with your program," Chapman

explained. "The ability to test everything in the sandbox before we went live has been invaluable."

Helping to Meet Regulatory Requirements

ClearStream belongs to several safety associations. As part of their membership responsibilities, internal audits are conducted to ensure the company's health and safety maintenance programs are meeting safety requirements.

"The new system improved the effectiveness and efficiency of our documentation and auditing process," concluded Chapman. "It's now easier to show that workers are aware of documentation, which is proof that our safety program is being



"By consolidating and simplifying the flow of HSE processes, our people are empowered to follow processes and procedures to ensure safety and compliance."

— **Kurtis Chapman**, Competency Advisor

implemented. We can also verify that documentation was completed, which is very important."

ClearStream, which has a rich history and culture of continuous improvement, is well-positioned to meet its safety obligations and future challenges with a scalable solution that provides a single source of truth for EHS processes and procedures.



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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