



## People and Process

### Building a Work-Site Safety Induction

Prepared by Paul Townsend  
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# Introduction

## People and Process

I'm going to begin with a deliberate misquote:

if you can't measure it, you can't manage it

This quote is often attributed to Peter Drucker, one of the founding fathers of management science. It is a shame that he never actually said it. Never-the-less, he did believe in measuring results, analysing the data, and managing the process. On the flipside, he also believed in the importance of people – understanding them and investing in a business' human capital.<sup>1</sup>

Applying this approach to our site induction we can ask ourselves two fundamental questions:

Are we communicating effectively - addressing people's needs?

Are we collecting the data – managing the process?

Let's be a little more specific. How many visitors did your site have last month? Were they there for meetings or to work? How much of the safety briefing did they understand? If an incident occurs, and we hope it does not, where is the paperwork?

## Objectives

Before proceeding further, we should examine our objectives. We probably have two goals. We want to:

- maintain a safe working environment
- demonstrate that the company has met its obligations – to cover our ar\*\*

Let's not dismiss the second objective as cynical or facetious. It is a valid aim. However, we have a big problem if it is our *only* aim.

The worst example I have seen was in a rail depot: the depot manager proudly handed me a 70-page safety briefing – 70 pages of detailed text and diagrams. "I've never failed a safety audit" was his proud boast. How could he? He had absolutely everything covered. Everything, except for the safety of his staff and visitors. I failed my obligations as a consultant at this point and simply nodded. What I should have done is asked him questions about content. I doubt that he could have recalled even half of the information – and he worked at the site.

And so, in developing a site induction, I would contend that we should adopt a dual approach:

**communicate with people and build a robust process**

and hold dual objectives:

**maintain a safe site and demonstrate due diligence**

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<sup>1</sup> *Management: Tasks, Responsibilities, Practices*, Harper Business 1993



## Developing the Induction

Having established an approach, let's turn our attention to the business of developing the induction. Firstly, let me state:

hire an external consultant!

I'm bound to say that because I am one, but I'll justify my statement below. I do realise that for a number of readers, your company simply won't invest in safety inductions. For this case, I'll make some low-cost practical suggestions.

Here are some things to consider when developing an induction:

### Perspective

Why an *external* consultant? The issue is one of perspective.

By way of illustration, consider a close friend. What's their mobile number? You probably can't tell me because it's on speed dial on your phone. What's their house number and post code? Again, you may struggle. To you it's obvious where they live – you've been there hundreds of times.

Most safety inductions are developed by people working on the site. To such a person, everything is obvious, from the layout of the site to finding it in the first place. Furthermore, who 'visits' their own site? Who is going to be thrown by the contradictory signage or the lack of instructions? I have spent a long time standing in reception areas, staring at the pile of badges, trying to figure out what I am supposed to do next.

I advocate a separation of site-specific technical knowledge and communications know-how. If you cannot hire an external consultant, try and identify an internal communications professional who can take on the job. Failing that, get someone from another site to write the briefing. Do not write the briefing for your own location.

A secondary benefit to role separation is the resulting tension between the subject matter expert (SME), to apply the usual term, and the Comms expert. This is a healthy, productive tension. The SME will always push for more detail and Comms will always seek to simplify.

**We need to adopt the perspective of the first-time visitor – to see the site through their eyes.**

### Standardisation vs. Localisation

I am surprised that many companies fail to standardise their induction process across work sites. I suspect that this is due to the ad hoc nature in which many sites are acquired. Businesses are purchased, franchises change hands, and projects initiated and closed. Induction processes tend to remain with a site. The result is a mishmash of style and approach, with anachronistic practices and outdated information. In many cases senior management have not reviewed an induction for many years, probably due to the impracticality of visiting every site.



For example, a site briefing went to great lengths to explain the different types of fire extinguisher present on site and detail exactly how to tackle a small or medium sized fire. This information was being presented to all site visitors. Upon reviewing the briefing (as part of a SiteSentinel project), senior management expressed their surprise – only to be further shocked when they realised that the briefing had not been reviewed for over 15 years.

A standardised process makes spotting erroneous information and missing content far easier and establishes a template which may be applied across an organisation.

Whilst we may want a standardised process, we do not want standardised information. Some information will naturally be applicable across an organisation – working time policy, drugs and alcohol policy etc. But other information may be strongly site specific and our induction must take account of this. In fact, our induction must highlight any site-specific practices or risks. Perhaps the site has a controlled manufacturing environment or third-rail electricity. Perhaps the site has an open water reservoir or a radioactive source for sterilisation.

Lastly, we must avoid management generalisations and platitudes at all costs.

The worst briefing I've ever seen was produced for a global heavy industry<sup>2</sup>. The briefing video contained a number of office-based interviews with the company's safety director in which he exhorted contractors to organise their tools correctly, obey site signage, keep their clothing clean, complete all paperwork on time, etc. The platitudes were not only ineffectual; they were counter-productive. I couldn't help but think that he had never stood on a rain lashed worksite in winter, up to his ankles in mud with his toolbox steadily filling up with rainwater. The video said a lot but communicated little.

**We need a standardised *process* containing high quality, site-specific *information*.**

## Information Timeliness

Inductions tend to focus on *what* information but rarely consider *when* that information is required.

For example, a young guy goes out 'on the lash' on a Sunday night. Come Monday morning, he's up early to travel to your site, slumped in the passenger seat of the van, nursing a hangover. Upon arrival he takes the site induction and is informed that the alcohol tolerance level is very low for working on site. What does he do? Turn to his employer and state that he can't enter the site? Or keep quiet and carry on?

**Visitors need certain information *before* they arrive:** required items of equipment and clothing; identification and personal information; site location and entry instructions; method statements; COSHH<sup>3</sup> data sheets, alcohol tolerance levels, etc. I know of one rail depot where visitors used to cross electrified rail tracks to reach the training room, whereupon they were warned of the dangers of crossing electrified rail tracks!

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<sup>2</sup> I'm keeping this description deliberately vague for obvious reasons.

<sup>3</sup> Control of Substances Hazardous to Health – a set of government regulations designed to improve industrial safety by registering and providing in-depth data about hazardous substances.



## Information Direction

Continuing our focus on information, we must also consider that information should flow in both directions.

We want to gather some details before the visitor arrives. Who is sponsoring their visit? Why are they coming to site? Are they bringing any COSHH registered substance with them? Are they registered as a contractor with us? Etc.

Conversely, we want to capture some information *after* their safety briefing. Perhaps the briefing has raised questions or they wish to provide feedback on what has been said. We should bear in mind that people will usually avoid asking questions in a face to face situation – they don't want to appear stupid in front of their peers or they may need time to reflect.

The obvious solution to our information flow requirements is to move our induction online. This may be via a system such as SiteSentinel or perhaps via the company website or even a simple structured email exchange. However it is done, **we need to deliver information in a timely manner and ask relevant questions before the visit and during the induction process.**

## Information Specificity

Let's consider the information consumer. Our visitor may be coming to site for a commercial meeting and have little background in our industry. Conversely, they may be an industry-steeped contractor intending to work alongside your own staff at the 'sharp end.' The information requirement of these two visitor types is very different in terms of both content and detail.

**Our induction process must therefore seek to identify the visitor and adjust the briefing information accordingly.** This 'switching' process, to use an IT term, may be quite sophisticated, taking into account visitors, general contractors (eg. plumbers), industry-contractors, contractors working under their own method statement etc. The more targeted our information, the more effective it will be.

## Information Layering

What about abbreviations and jargon? Should we use or avoid them? **We should use them.** Abbreviations<sup>4</sup> and jargon have developed as an efficient means of communication between peers. Many of the visitors entering your site will be 'of your industry' and using acronyms such as COSHH (which I've used above) is efficient. If you are constantly writing everything out in full, those 'in the know' are going to be frustrated and, more dangerously, assume that the content is not for them.

What about those not 'in the know?' We must offer an explanation. Provide a link to explain the acronym/ jargon or provide a glossary of terms. This approach is known as information layering and is key to the success of an induction.

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<sup>4</sup> I include acronyms and initialisms in this term



Here is my classification/ approach to abbreviations and jargon:

Abbreviation Type	Example	Action
General industry abbreviation	PPE Personal Protective Equipment	Write in full on first use.
Specific industry abbreviation	FOD Foreign Object Debris Aviation industry	Write in full on first use. Provide optional explanation via link or glossary.
General industry term	Wagon Usually an articulated lorry	Provide optional explanation via link or glossary.
Specific industry term	Road Section of track where trains are 'parked' for maintenance in a depot. Rail industry	Provide optional explanation via link or glossary.
Localised term	The pond Used on a site to refer to the lagoon of cooling water	Explain on first use.

## Mind your Language

Most of the briefings I encounter adopt a pseudo legalese writing style that is difficult to understand and completely unsuited to most of the target audience. For example, many briefings will state something such as:

you must at all times when moving on foot about the site infrastructure ensure that you utilise the provided walking routes. Walking routes are painted green except on the south side of the site where they are indicated by white...

I suspect that this approach is adopted in an effort to add gravitas to the message. It does not. It simply obfuscates the meaning. I'm no stranger to sophisticated language but adopting a torturous sentence structure serves no purpose. Furthermore, it fails many visitors who may be more 'practical' than academic and may be working in their second language.

**We should use common words and short sentences.** Leave long sentences to academics and lawyers. Short sentences are very effective. They are powerful. They convey information well. I would address the above subject by showing pictures of both green and white walking routes and writing:

when walking around the site please use the authorised routes wherever possible.



## Visual Language

As stated above, visitors may not be adept at assimilating large volumes of dense textual content. But help is at hand – we have another language to work with: visuals.

I do not advocate shooting a safety induction video. Video is costly and time consuming to produce and, more importantly, is difficult to update. We should use video clips, but sparingly. They are useful for showing sound and movement such as a semi-automated fork lift truck or a depot protection system in action. Video should be a component of the whole rather than the main feature.

**Our main visual input will be photos.** We need high quality images depicting site infrastructure, hazards, and equipment. In certain cases, our needs will be best served with illustrations. A site schematic, for example, is an effective way to provide your visitor with a mental model of the site's layout. But beware the temptation to load the schematic with detail. Every element added will make the model more difficult to retain.

## Review and Update

I've already mentioned my experience with a fifteen-year-old briefing. An induction is only as good as its last update. Work sites evolve over time; equipment is updated (how many defibrillators did you have on site five years ago?); procedures change.

Don't treat the creation of an induction as a one-off 'tick box' exercise. At the start of your induction project, **put arrangements in place to have both the content and the process regularly reviewed and updated.**

## Audit Trail

Here's a little exercise: pick one of your 'people suppliers'. Look at their invoicing and see who started work with you last month. Now find the individual's site induction paperwork.

For many senior managers this exercise will end in disappointment<sup>5</sup>. Desk draws will be searched, bits of paper pulled from files and questions raised such as "did John or Dave do that one?" This is a dire state of affairs, given our second objective - *demonstrating* that the company has met its obligations.

A robust induction process must involve testing for both understanding and information retention, followed by storage of test results in an accessible system. Ideally, the system will be searchable – we don't want to be leafing through wads of paper looking for a name.

**audit trail = testing + accessible results**

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<sup>5</sup> Very well done if it didn't.



## Concluding Remarks

In this paper I have tried to offer practical guidance on developing a work site induction. Whether you use an external consultant or an internal resource, I hope that you will give the undertaking the attention it deserves.

Developing a fit-for-purpose induction is not a simple task. It requires care and planning; it requires both technical knowledge and communications expertise; it requires external perspective; it requires a focus on communicating with people and building a robust process.

My aspiration for this paper is to engage senior management - to convince operations and safety directors of the need to be involved in the project. Next time you visit a work site, please view the induction process with a critical eye and ask yourself: does this foster a safe working environment? **Does this demonstrably fulfil our safety obligations?**

### About the Author

Paul Townsend is Principal Consultant at Lucid Communications: [paul@lucidcommunications.co.uk](mailto:paul@lucidcommunications.co.uk)

He has worked on operational, health and safety communications projects for over 14 years. Subject areas include safety critical communications; personal track safety; non-technical skills; field enablement; train protection warning system; lifestyle management; rail safety for schools; level crossing safety.

Paul developed the Site Sentinel briefing platform in response to personal experience of poor site safety briefings within the UK rail industry. To date, the platform has delivered over twenty thousand site inductions.

Prior to founding Lucid, Paul worked in the IT industry in a range of technical and management roles.

Education: BSc Chemistry (2.1) Manchester, PgDip Digital Education (Distinction), Edinburgh

