

Redefining safe workplace playbook management



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Executive summary

Returning to work following the COVID-19 pandemic lockdowns has required very careful management. Many organizations have created playbooks that explain to employees the health and safety actions taken and new policies and procedures to follow.

Today, most organizations have returned to work to some degree, but uncertainty and potential disruption still exist. The possibility for new variants makes the future unclear. Many feel confident that enough has been learned about COVID-19 that businesses are unlikely to again face the complete shutdowns of the past.

Have playbooks then served their purpose?

The pandemic has provided an opportunity to re-assess and rethink how organizations operate. Permanent changes to the landscape of work can't be ignored. Today, organizations must change the way they educate and train their staff, ensuring that everyone follows the new processes and procedures.

The first-generation of playbooks focused on health and safety, but these resources can evolve and continue to serve powerful roles in the future, providing a framework to build business agility and resilience as operational procedures and processes change.

A changing business and operational environment

Disruption has always been a natural part of business. McKinsey reports that supply chain disruptions lasting one month or longer will affect business every 3.7 years.¹ Despite that, the COVID-19 pandemic demonstrated how woefully under-prepared businesses were to manage disruption at scale. It forced a need to build resilience and agility into organizational structures and operations at the same time as it dramatically re-shaped the business landscape.

This level of disruption can present a major opportunity for evolution. While health and safety remains the top priority as organizations restart operations, according to McKinsey, “Across industries, companies are realizing that they can aspire to much more than simply a safe return to work. They want to take what they have learned during the COVID-19 crisis and create a new kind of operational performance.”²

The challenge now is for organizations to introduce new operating models based on digital technologies, the right business processes and operating procedures, as well as sound and enforceable governance. The growth in remote and from-home work is evolving as workers look for increasingly flexible conditions. Hierarchical management structures are breaking down to accommodate the increasing presence of small, distributed teams with greater autonomy and decision-making powers. Rapidly accelerated digital transformation is introducing entirely new business processes and workflows.

It is time to take the playbook concept and evolve it beyond safety. Digitizing and centrally managing playbook information allows organizations to easily create and update content, communicate early and often, track usage to drive compliance and introduce new guidance where and when needed. They can become the content engine for driving a more digitized, agile work culture while maintaining the highest levels of business compliance.

A safe workplace playbook can address the following concerns:

- Communicating health and safety risks for employees
- Meeting increased regulation compliance
- Enabling distributed business and work models
- Distributing new policies and procedures
- Ensuring employee awareness and compliance with new operating conditions
- Facilitating education and training in new processes and work practices
- Gathering employee feedback for continuous improvement

¹ McKinsey, Risk, resilience, and rebalancing in global value chains. (2020)

² McKinsey, Jump-starting resilient and re-imagined operations. (2020)

Evolving safe workplace playbook management

A coordinated, digital approach for safe workplace playbook management helps ensure that employees, suppliers, business partners and other third parties are all up to date on the latest operational procedures. Information is easy to find—from any device or system—and always current and accurate.

With digitally driven safe workplace playbook management, organizations have a comprehensive enterprise solution that rapidly handles creation, review, approval and distribution of vital information across the organization and beyond. It allows companies to evolve strategies to meet their business needs and goals in a post-pandemic work environment.

Capabilities of safe workplace playbook management

- Maintain a central library of company policies and procedures
- Make content available on any device anywhere
- Establish defined processes, including review and approval
- Capture who has read documents
- Automate email notifications for assignments
- Integrate with other enterprise applications
- Embed forms and checklists for employee feedback
- Maintain easily through automation
- Expand capabilities with custom configurations

From health and safety to operating procedures

In the heat of the coronavirus crisis, organizations were forced to work in new ways, and they responded astonishingly quickly. Much of this progress came from rapid shifts in operating models. For example, the Manufacturing Leadership Council found that 58 per cent of manufacturers are prioritizing new procedures for remote working as a result.³

The return to work has meant not only new operating models for safe work in the office, factory or shop floor, but also entirely new models for home and remote working. Compliance with company and regulatory policies and procedures must be ensured for employees who are rarely or never on site and have little or no contact with management.

However, the pandemic also demonstrated that, for many, operating procedures had been neglected. In a significant number of cases, standard operating procedures (SOPs) were still paper-based, built on antiquated systems and in need of updating. Poor or inadequate SOPs can massively affect product quality and compliance. The cost of poor quality (COPQ) can be very real. For example, experts suggest that in Life Sciences, it can be three to six times profit levels.⁴

³ Management Leadership Council, M4.0 impact: The inflection point. (June 2020)

⁴ iSixSigma, Apply cost of poor process and product quality to Life Sciences.



Beyond operating procedures to the employee journey

Many organizations discovered, perhaps to their surprise, that the small, nimble teams built in a hurry to adapt to the COVID-19 emergency were more productive and made important decisions faster. When asked, 42 per cent of manufacturers said they now prioritized a common sense of purpose amongst working teams.⁵

Building this sense of purpose extends beyond supplying the business information and collaborative abilities those teams need. It means creating a work environment designed to support and enhance distributed working. It also means setting out clearly how these teams can operate within the corporate structure, as well as delivering policies and guidance to help employees navigate a constantly changing work landscape.

Employees must have access to the right education and training, and mechanisms must be put in place to ensure that people understand the new procedures and have completed their training successfully.

However, the pandemic has also introduced an entirely new employee factor that organizations must immediately address. Corporate culture—so vital to sustainable success—has to be re-imagined. The “Great Resignation” has seen literally millions of people leave their position with no job to go to.⁶ At the same time, new hires are joining the company, yet may never visit the office nor have face-to-face contact with colleagues or management.

By extending the safe workplace playbook, organizations have a means to deepen employee engagement. It puts in place a regular, personalized communications medium for employees. It allows the company to address their needs wherever they are on their specific employee journey, including new training courses, role changes, promotions and benefits provision.

Connecting employees to ecosystems to customers

Organizations understand that sustainable operations mean being able to respond quickly to change in the future. Disruption and uncertainty are increasing, making effective supply and demand planning more challenging. Adapting to the rocky ride of the pandemic has driven a dramatic increase in collaboration across the entire ecosystem of employees, suppliers, partners and customers.

Responding to changing customer needs requires organizations to develop new use cases and tailored experiences based on insights gathered through partners and supply chains. Employees must be connected to partners and customers much more intimately than before.

Organizations must educate and communicate with their ecosystems to ensure that everyone is aware of their roles and responsibilities and meeting their obligations. An enhanced, cloud-based safe workplace playbook management solution can securely extend these capacities across the extended value chain.

⁵ Management Leadership Council, M4.0 impact: The inflection point. (June 2020)

⁶ CBS News, The Great Resignation: Why more Americans are quitting their jobs than ever before. (January 2022)

Delivering a safe workplace playbook management platform

Whether creating a new playbook, enhancing an existing playbook or incorporating best practices from industry-leading playbooks, such as Ford or Lear Corporation, it's important that content is accessible, current and trackable while holding the organization and employees accountable. Employees must be able to easily find and understand current protocols and adapt to new practices when and where needed.

In these circumstances, communicating by email or distributing content via file shares is not sufficient, as it forces the business to monitor distribution lists and track how many people have read, understood and acknowledged the information.

By implementing a scalable enterprise information management platform, organizations gain a digital foundation to proactively manage playbook creation, access, versioning, distribution and consumption. Compliance and employee confidence are safeguarded along the way.

Key benefits of a safe workplace playbook management platform

- Demonstrate corporate-wide commitment to employee safety
- Put updated processes, protocols and checklists at employees' fingertips
- Communicate policy and procedural changes early and often
- Rapidly modify content to address changing business conditions
- Provide access anywhere from any device
- Track and report on adherence to corporate policies and regulations
- Reduce legal and regulatory risk and cost
- Easily audit and report user activity to enable continuous improvement
- Quickly capture employee feedback, reports, images or videos

What to look for in a safe workplace playbook management platform

There are a number of capabilities that organizations should look for when evaluating platforms to manage safe workplace playbooks. Among them are the ability to:

Create, capture and digitize content

A centralized, digital platform lets organizations quickly create, amend and share vital content with employees, including documents, videos, images and more. As policies and procedures are constantly changing, a central platform allows for an effective and highly automated versioning and amendment process. Content can be personalized to individuals or teams. Key authors can collaborate on new procedures and workflows, manage the review process and send updated documentation to the employees affected for review.

Integrate playbooks with other enterprise applications

Leading playbook management platforms offer deep integration with other enterprise applications. This allows employees to create, modify, co-author, share and store files within a single user interface without having to swap between applications or file lists in the cloud.

Work securely—anytime, anywhere

Forty-one per cent of manufacturers say maintaining an effective means to communicate regularly and openly with employees is a key priority for their business.⁷ With a playbook management platform, employees can securely access the most up-to-date and accurate versions of every entry and document from anywhere and any device. The platform also facilitates the dissemination of operational policies and protocols to partners and suppliers with the same governance as applied to employees.

Automate to improve business processes

The best playbook platform will automate workflow assignments, notify users by email of their tasks and ensure a smooth review and approval process of all content. It automatically pushes approved changes to users that have previously viewed the procedure, ensuring users are never working on out-of-date information.

Enforce accountability

The platform gives the organization visibility into playbook distribution and usage to gain assurance that protocols are being met. It can easily incorporate new operating procedures and workflows, verification checklists and inspection tools to help implement required policies and regulations. Extensive auditing and reporting capabilities ensure that employees have taken the required actions and completed the necessary checklists, forms and documentation.

7 Management Leadership Council, M4.0 impact: The inflection point. (June 2020)



[Watch the demo](#)

Why OpenText?

The initial phase of playbook adoption has shown just how challenging it is to manage and make accessible all the resources and documentation involved. Playbook content is extensive—policies and procedures, step-by-step guides, checklists, videos, work schedules, etc.—and constantly evolving.

Safe-Workplace Playbook Management from OpenText™ is a cloud-based platform designed to address all these issues. It delivers a scalable and secure content management platform to centralize the management of playbooks. It manages the flow of information from authors, manages the review and approval process, distributes the information to employees and gathers important feedback from users.

Companies can build net-new playbooks or adapt existing industry templates to bring all content and resources together. Employees and external partners can easily find and understand current protocols, as well as introduce new practices when and where needed (See Figure 1).

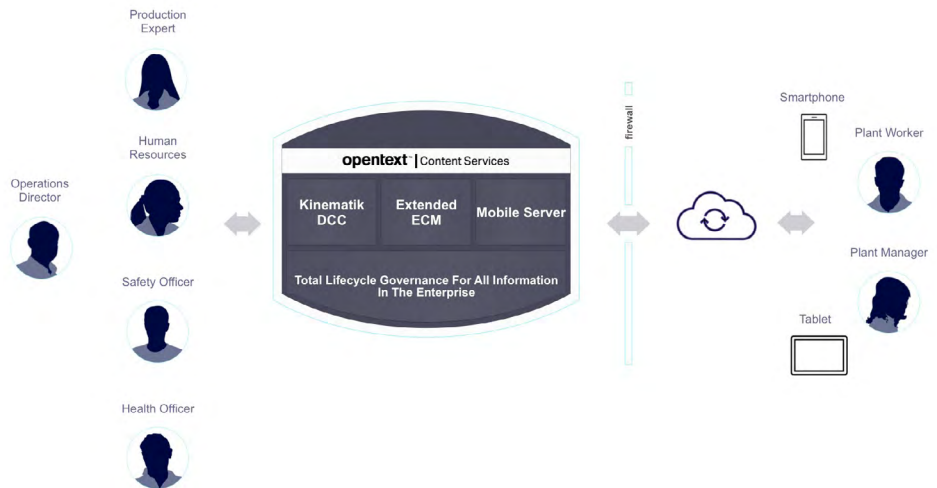


Figure 1: Safe-Workplace Playbook Management from OpenText

In short, **Safe-Workplace Playbook Management** helps organizations be more flexible and adaptable to everyday demands and challenges. It prioritizes the health and safety of employees but also goes beyond, to allow organizations to react to the dramatically different workplace environment of the post-pandemic world.

About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit: [opentext.com](https://www.opentext.com).

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