

# HOW OPTIMUM SAFETY MANAGEMENT IS SHIFTING ITS BUSINESS PROCESSES TO A UNIFIED DIGITAL ENVIRONMENT

Optimum Safety Management is a full-service safety consulting firm that designs and integrates safety management solutions and programs, focusing on the metal, precast and construction industries. Based in the Chicago region, the company serves clients nation-wide helping to achieve best practices in workplace safety and compliance management, resulting in significant gains in safety culture engagement, productivity, and profitability.

**INDUSTRY**  
MANAGEMENT  
CONSULTING

**NORTH AMERICA**  
UNITED STATES

## PROJECT HIGHLIGHTS:

Well-defined business processes

Proper control of business variables

Elimination of 64 hours of manual effort monthly

## CHALLENGES

Working on a wide range of projects simultaneously, Optimum Safety Management was using multiple systems for data tracking, however, none proved to be efficient. Not only were the previous CRM and ERP solutions not user-friendly, but these systems also did not allow for the customizations the company sought to improve company operations. Anticipating growth and scale, including remote offices in other states, the organization needed a new robust and flexible solution to effectively develop and implement safety management solutions.

“The previous technologies that were used did not provide a uniformed experience. We always had to export from here, click over there or switch records to get the information we needed at amoment’s notice. We needed a true platform that would unite all our data and make it actionable, which in turn would make it profitable. Luckily, the Creatio platform met all our requirements”.

Steve Yates, CHST CEO & Founder



## OPTIMUM SAFETY MANAGEMENT REQUIRED THE FOLLOWING:

A scalable software to support company growth

Wide customization capabilities to fully meet the organizations needs

A seamless sales workflow from lead to opportunity, and project implementation

Activity tracking tools to increase the operations teams efficiency

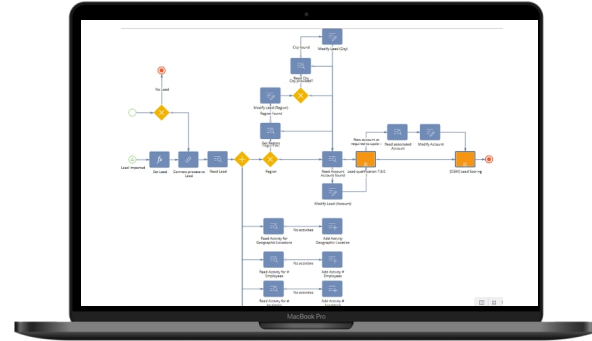
A unified environment for contacts and account management

## SOLUTIONS

With Creatio and Creatio's system integrator E6 Solutions, Optimum Safety Management implemented well-defined business processes, and gained control of their business variables. The company has made a significant leap in process automation, switching from shared Excel spreadsheets to innovative technology. Creatio's low-code capabilities allowed Optimum Safety Management to complete tasks that once took hours or even days for human resource staff, now only take minutes; eliminating 33 Excel spreadsheets, and 64 hours of effort per month collectively.

### CREATIO PROVIDED THE FOLLOWING:

- A unified database for all accounts and contacts for structured customer data management
- Large-scale automation of various business processes
- The mapping of the complete customer journey, from lead scoring to opportunity and account management
- Efficient order processing and invoicing
- A template library enabling the production of various invoice types depending on the project
- Integration of ERP within the Creatio platform allowing for the visualization of human effort and resource utilization, and predictive loading for the coming quarter
- Advanced project management tools enabling workload and time planning as well as customer requirements fulfillment control
- Customized workflow for the operations team to easily track activity, and complete tasks faster
- Tailor-made dashboards for invoices monitoring



"To have processes on a platform that have allowed us to complete tasks that once took us hours, if not days, of manpower to accomplish within minutes is a great thing"

**Steve Yates, CHST CEO & Founder**

## SUCCESS WITH E6 SOLUTIONS

Creatio platform implementation was successfully managed by E6 Solutions, whose team has been helping customers to leverage their CRM implementation for over 30 years. E6 Solutions took a rolodex and e-mail filing system to a fully integrated solution. Optimum Safety Management established a strategic partnership with E6 Solutions and in the near future, they are planning further developments on Creatio, including sales and marketing reporting capabilities and integration with accounting software Quick Books.