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Case study



Sector Energy
Service Bespoke Software

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Lean and Mean Risk & Incident Management

When tasked by one of our longest-standing customers with the replacement of an expensive and complicated Risk and Incident Management system, we worked closely alongside them to distil their key processes and requirements down into a robust, reliable system that's tailormade to do exactly what they need and saves them money too.



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Results at a glance

- A fully fledged bespoke system inside Office 365 with simplicity and ease of use at its core
- Significant cost savings achieved
- An efficient and robust system ensuring regulatory and safety demands are met
- Positive impact on ESG rating

It’s safe to say that the business of handling, storing and delivering hazardous yet vital products to an ever-changing and evolving market carries its fair share of risk. The process of proactively managing this risk must be frictionless in order to ensure regulatory and commercial safety demands are met while still remaining competitive and agile in a volatile market.

The risks faced by our client can manifest themselves in a number of ways. Primary is the exposure to operational risk that comes with the handling of hazardous materials by and for a multitude of different contractors and customers. This operational risk can lead to injury, not to mention disruption to business on a large scale if the critical, everyday products they store are not distributed to customers in a timely manner. If these types of incidents happen, it’s imperative that they’re logged and investigated, to determine the root cause and implement any necessary changes that will prevent a repeat incident in future.

Additional risks are present within the process of change itself. Any speculated changes to protocol or procedure must be managed and reviewed, to assess any potential knock-on effects across the business and ensure that the change is properly governed and communicated. Personnel changes carry a similar risk and should therefore be managed in the same way.

Conversely, risk is also introduced if processes don’t change. The longer something is left unchanged, the higher the risk that it no longer conforms to the latest health & safety regulations, or that it doesn’t make use of more recently available technology or methodologies that could help improve efficiency, quality or general throughput.

These different forms of risk may seem like they would need respectively different strategies. However, whether an incident is being logged, a change implemented or a process audit performed, at the heart of it is a common central process. With this knowledge in mind, and with an upcoming renewal on the license for their existing Risk Management system that was more complex and difficult to use than it had to be, we discussed a bespoke Risk & Incident Management system that they could host themselves, that would be built from the ground up with simplicity and ease of use in mind.

We decided to host the system as a custom web part within our client’s existing SharePoint Online tenancy, seamlessly integrating the user interface of our bespoke system with SharePoint, a platform that users were already familiar with. The web part uses modern web development practices and toolsets to deliver a clean, interactive experience requiring minimal navigation. Utilising SharePoint Webhooks and Azure Functions we built an event-driven API layer for the front-end web part to talk to. The system now provides a context-aware single-page experience that presents differently based on the type of risk or incident being managed.

Additional benefits of hosting the system within SharePoint include built-in version control and permissions management, as well as a means for admin users to self-manage configurable lookup information stored in SharePoint lists when needed rather than having to raise a support ticket. Having the data immediately available within Office 365 has also enabled easy integration with Power BI, which allows our client great flexibility in building and maintaining all sorts of useful reports that interface directly with the information in SharePoint.

We've worked with Waterstons for a long time, so they really get us and know our business. They worked alongside us to understand our needs and define a scope that worked within our strict timescales, and collaborated with us throughout the entire development process to ensure the end product was exactly what we required. We ended up with a product that not only reduces our costs and aligns with our strategy, but is a huge improvement over the previous system with continually excellent feedback from across the business.

Head of IT

The delivery of this system has also included digitisation of the change management process, which was previously done via a series of paper forms, manually signed off as they progressed through the multiple stages of the process. Our system handles this as a specific form of risk, using the common underlying process and user interface components but injecting various additional stages into the process, such as a checklist of operational areas to consider and various stages of team approval. This ensures maximum visibility of the change assessment throughout its life by all parties involved, and provides a full audit trail of tasks and approvals at every stage. The efficiency, ease and accuracy with which the process can be carried out is greatly improved from start to finish.

Through the intricate mapping of our processes and the creativity of the Waterstons' developers, they were able to design and develop a system that is both functional and aesthetically pleasing. The collaborative approach and constant design, deliver and feedback cycles helped bring our vision to life, within scope, on time and in budget. The professional and diligent attitude of the project manager and team throughout the project enabled us to seamlessly migrate to our new solution with no impact to the business.

Business Systems & Standards Manager UK

Another benefit of the system is its positive impact on our client's potential ESG rating (Environmental, Social & Governance). The three criteria in this rating have all been boosted:

- Environmental – by digitising previously paper-based workflows, we have reduced paper waste and printer ink usage
- Social – by making the process of mitigating risk and preventing incidents easier and more robust, we have helped our client make the workplace safer for employees, suppliers and contractors
- Governance – the system introduces improved governance controls across the spectrum of risk, from logging incidents to internal process audits. Digitising certain processes has also greatly increased their efficiency and the ability to track progress and report on them.

Through Waterstons' customer intimate approach, we were able to help our client distil down the complexities of their previous Risk Management system into something lean and easy to use, and that still captures all the necessary information and provides a robust means of proactively managing, mitigating and predicting risk. The move away from the licensing fee of the previous system has also provided significant cost savings, which have been further bolstered by the use of existing user licenses for Office 365 and the cost-effective nature of Azure resources.