You need to manage strategically

Not enough attention is placed on the need for business practices to be integrated into safety thinking

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Imagine an operational leader of any business who is unable to produce a strategic plan. Such inabilities would be career-limiting and characterize the individual as a doer not a thinker, or as a task-master rather than a strategist.

Much has been written about the need for safety to be integrated into business thinking for safety to become the way of business and a core value rather than priority. Not enough attention is placed on the need for business practices to be integrated into safety thinking.

Safety is not simple. It is more than rule-following, common-sense and paying attention. Safety is influenced by [culture](#), systems, leadership styles, history, economy, locations, etc. With organizations of all sizes, industries and maturity of safety systems, performance and culture, one of the most significant differentiators of successful organizations in safety is the way safety is strategically managed.

Consider: What is your three to five year strategic plan? How effectively this question is answered is the difference in tactical vs. [strategic thinking](#).

Strategy, not tactics

A long-term client who is a best-in-industry organization and has a 45,000 global employee base, currently has 40 open positions for qualified safety professionals to meet business growth. During a regular strategy session with senior leadership to address this very issue, a shared frustration prompted a discussion about the future for safety professionals and a plan to overcome organizational shortcomings. Universities and on-the-job company training tend to produce safety technicians, rather than strategists.

Of course, we need technically-focused and program subject-matter experts. Most importantly, we need individuals who are able to challenge status-quo thinking and perceptions about what is possible, and to direct resources and prioritize initiatives to advancing performance and culture. It is the strategists that will advance safety, both in industry and individual company performance.

Safety follows strategy

Strategy, as a business concept, is relatively new. In fact, not until the early 1960s did the term move beyond a military or political meaning to being recognized as valuable in the business domain.

"Strategy's coming to dominance as the framework by which companies understand what they're doing and want to do, the construct through which and around which the rest of their efforts are organized, eclipses any other change worked in the intellectual landscape of business over the past fifty years." (Kiechel, 2010)

Moreover, in the U.S., it wasn't until December 29, 1970, that President Nixon signed the Occupational Safety and Health Act of 1970 into law. Whether coincidence or following the reprioritization of government and business values, safety followed strategy in the history of business in America. Forty years later, most industries and businesses have experienced a downward trend in injuries and severity due largely to the level of attention, advancements in technology, systems- and behavioral-thinking and, occasionally, brute force awareness campaigns. Safety will improve with additional attention, but will fail to produce additional return on investment without a better model to prioritize attention and energy.

Initiatives and results are not strategies

Most are familiar with Albert Einstein's continuously referenced quote, "Insanity is doing the same thing over and over again and expecting different results." Yet, here we are in 2013 with the average business and safety professional looking for the next hand injury, housekeeping, behavior, severity or near-miss program. Developing an awareness campaign, improving reporting, achieving zero injuries, and obtaining OSHA VPP Star Status are all initiatives and outcomes; they are not strategies.

Strategy should be set by those with a vision, rather than those motivated by closing gaps, or those compensated by reductions in cost or program implementations. Organizational leaders must first outline and clearly communicate what excellence looks like, where they are, how the journey will be taken and how measurements of progress will be recognized and communicated along the way. It is natural to first focus on the current state and then plan to close the gap. This is a mistake and is outlined in the 2013 book, STEPS to Safety Culture Excellence.

"It has been suggested to us many times that an assessment should be the starting place for the journey to Safety Culture Excellence rather than developing a safety strategy. In our experience, when you begin with the assessment, your strategy can become simply a plan to address your weaknesses rather than a true strategy. It is like planning your life based on a visit to your doctor's office. A strategy should give direction and meaning to everything else you do in safety." (Mathis & Galloway, 2013)

Strategy is more than ideas, promising or provoking. It is the ability to devise a framework that allows for the continuous prioritization of decisions, resources and initiatives to accomplish and sustain business objectives (e.g., customer saturation, quality, productivity and safety). Every organization seeks to capture as much market share as possible. For-profit companies seek to attract the largest amount of consumers. Not-for-profit groups seek both the largest amount of charitable contribution and the majority of hearts and minds. In both regards, safety is no different. Professionals position their value-add for a substantial piece of the budget, but also attempt to sway employee attention share.

Two focal points

Safety goals and objectives must be focused on two areas: incident and injury prevention, and the creation of Safety Culture Excellence. Organizations must maintain a comprehensive prioritization process to determine where to focus incident and injury prevention efforts. Typically they are concentrated on conditions (e.g., work space, design, systems) and behaviors (i.e., mandatory and discretionary).

Culture is just as important, as it is the most effective sustainability mechanism. Culture is why prevention efforts succeed or fail. While culture is certainly affected by efforts to improve, they must be a fundamental and proactive part of the strategy to ensure acceptance, alignment and sustainability.

Consider discussing with other operational leaders to identify and map out the following:

1. What does Safety Culture Excellence look like? (Think observed performance, not just results)

2. If we had 100 percent acceptance with rules, policies and procedures, what other effort is needed to ensure incident-free performance?

3. If we achieved incident-free performance and were asked to describe the reason, what is our response?

4. What would the common beliefs be that reinforce the reason we have achieved excellence in performance and culture? (Identify the top three beliefs.)

5. What experiences would be occurring consistently to reinforce these beliefs?

6. What are the leadership safety roles, responsibilities to ensure these experiences are occurring?

Path forward

There are many questions this article should prompt. For the evolution of thinking and action in safety improvement to be recognized, the final list of questions must be answered, not by safety professionals, but by business leaders. Safety strategy must be a business exercise, not a delegated activity to the safety professional or department.

Without strategy, is the recognition of new safety results more than luck? Is the inability to improve because of the intervention or other influences? Everyone wants excellence in safety performance and safety culture, yet we often forget excellence is not just about results; it is the confidence and ability to articulate why great results were achieved and knowing how to repeat and advance year after year.

**References**
Kiechel, Walter (2010) The Lords of Strategy: The Secret Intellectual History of the New Corporate World (p. ix), Cambridge, MA: Harvard Business School Press
Mathis, Terry L. & Galloway, Shawn M. (2013) STEPS to Safety Culture Excellence (p. 1), Hoboken, NJ: John Wiley & Sons, Inc.

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