SAFETYCHAIN

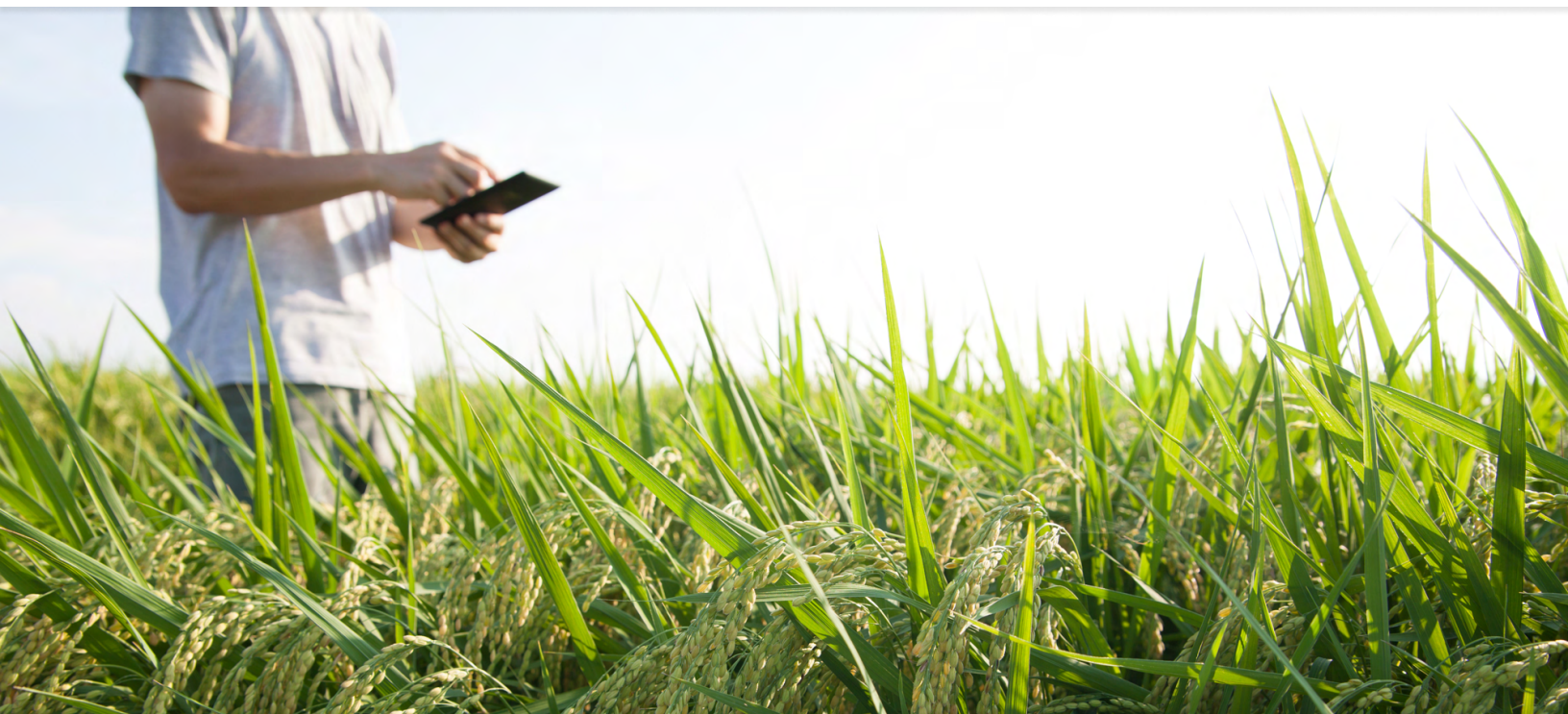# SHIFTING FROM PAPER TO TECHNOLOGY

How 3 Food Producers are Adopting Technology to Drive Operational Efficiency

The shift from utilizing paper to leveraging technology is growing exponentially for good reason. Not only does it provide operational efficiencies, it provides food and beverage companies better opportunities to more effectively ensure compliance of customer and internal requirements, along with ensuring adherence to regulatory and non-regulatory standards. Technology is also become a catalyst for companies to better mitigate risk. It enables them to catch and manage issues earlier as well as help control costs by minimizing reworks, waste, customer returns, and recalls.

Yet, there are many reasons why companies find the prospect of making the shift from paper to technology daunting, including concerns about the costs and time to implement, picking the 'right' technology, and overall adoption and usage by front-line workers.

As a digital plant management platfrom in over 2000 facilities, we at SafetyChain have the opportunity every day to see how leveraging the right technology solution can help companies transform compliance and program data into operational improvements.

In this guide we will share some common themes and experiences from the journeys of three SafetyChain customers who made the switch from paper to technology, including:

▸ What factors led each of them to make the move from paper to a technology solution and what decisions went into the vendor selection process.

▸ What is was like to undertake the implementation process and support their teams as they made the transition from paper to tablets.

▸ What results and ROI have they achieved.

Three Food Producers' Insights on Adopting Technology

Anthony Villaloboz

Anthony Villaloboz is Director of Quality Assurance, Bobby Cox Companies, Inc. a multi-concept company headquartered in Fort Worth and Midland, Texas. Bobby Cox Companies run their own USDA inspected facility. They also have a distribution center at that site to help insure quality.

Rudy deWit

Rudy deWit is Director of Food Safety at Thresher Artisan Wheat in Blackfoot, Idaho. Thresher processes soft white wheat into a ready-to-eat ingredient for cereal plants in the United States.

Madison Maxwell

Madison Maxwell is Director of Food Safety & Compliance at Roots Hummus in Asheville, NC. Roots produces non-GMO verified gourmet hummus which is distributed in the United States throughout the Northeast, Southwest, Southeast, and southern regions of the Pacific coast.

Why Technology?

Bobby Cox

Primary goal with shifting to technology was to give everybody in operations real-time visibility that included the opportunity to view files and records concurrently for their food safety program, HACCP program, sanitation, and pre-operational checks. Their paper file system was holding them back in that only one person had access to program records at any given time.

In selecting a technology vendor, Bobby Cox needed a solution that would perform offline in environments such as walk-in freezers and would sync to the database when Wi-Fi was available. They also needed an economical solution that provided the flexibility to work with both Android and iOS tablets, and would accommodate eventual expansion into QA checks.

Thresher Artisan Wheat

Initiated the move to technology as a means of streamlining their operations. They wanted to leverage technology to introduce new efficiencies into their procedures and limit the amount of paper generated for sanitation processes, rail car checks for outbound product, records tied to SQF certification, and metal detection checks.

It was important to Thresher that the type of technology adopted offered the flexibility to work with their current production workflow. They also wanted to use photos to capture and document steps within their sanitation processes.

Roots Hummus

Recognizing the need to shift from paper to technology to keep up with the pace of production, they wanted to provide their FSQA operations team with an effective means to manage non-GMO certification as well as GFSI compliance, quality checks, pre-operational tasks, and post-operational sanitation.

As a fast-growing organization, Roots Hummus needed a solution that would scale easily to the future needs of the expanding team. It was also important that the solution provider had a specific focus on the needs of food companies, and that the implementation of the project be supported by a vendor with food industry experience. Roots needed to be up and running in a short period of time.

"Any quality assurance person will tell you that they have tons of files, they have loads of shelves and filing cabinets full of files, right? Technology is obviously where everybody is going. I feel like we needed technology, not just to be able to limit how much space we're taking up with all these different files, but to give everybody the opportunity to view files and records at the same time."
—Anthony Villaloboz

"We added technology to the cleaning process that involves optical sorting and x-ray sorting and, as part of that renovation, we decided that for 20 years we've done everything on paper, and it was time to improve. With the paper files, we just had mounds and mounds of paper everywhere."
—Rudy deWit

"Why not technology? There's an expectation that with the way that the world is moving, that we'll be able to get answers quickly, we'll be able to solve problems quickly. The fact that our product, it's a high-risk food, it's a ready right to eat food—it's crucial that we get it right. We really did need that real-time visibility of the operations and we needed the efficiency of automation."
—Madison Maxwell

Why Technology?

Combining best practices along with the flexibility of a system that is configurable to each company's unique needs – the implementation process ends up being efficient yet unique per customer.

In the conversion of paper forms to mobile forms undertaken by Bobby Cox Companies, Anthony learned that he needed to invest time in an evaluation of workflow on the production line. It wasn't as simple as handing a lengthy paper form to a design team and expecting to get an identical digital version of the form. Data-driven tablets work different from a paper checklist, requiring users to submit information into the system as they work rather than completing a series of tasks and entering them on a form. The time Anthony put into assessing his workflow helped drive the successful design of forms that met the needs of his team.

The operational processes at Thresher already aligned with the proposed implementation workflow, so for Rudy, implementation was a simple iterative process of providing paper records to his SafetyChain implementation team and then reviewing and approving the mobile form designs.

During the implementation at Roots Hummus, Madison found that her team needed to fill in gaps to support their overall food safety plan, such as formalized SOPs. They had GMPs in place, and were using good manufacturing practices, but they hadn't quite yet formalized a lot of these practices into documentation.

"I really feel that going through implementation did make our overall process better and more logical, and even helped us with some of our gaps. Really that's what QA is about, it's just continuously improving your process."
—Anthony Villaloboz

"The implementation was very simple. We initially had our meetings with SafetyChain, and I wondered how well our paper records would translate into digital audits. We had incredible support from the SafetyChain leaders and the implementation team. That part was really easy."
—Rudy deWit

"With SafetyChain, there was a support team ready in place that really knew a lot about the best practices. Just having that kind of guidance from the get-go has made this so much easier, we just feel taken care of."
—Madison Maxwell

Dealing with Change

Adopting technology in a production environment is a team effort and some individuals are reluctant to let go of established ways of collecting data. All three companies concurred that once their teams saw the value in the availability and readiness of the data after collection, they became convinced that technology was bringing value to their jobs.

The insight that the technology provides into what other operators and departments are doing has enabled better communication among team members at all three companies and has fostered a stronger food safety culture in each organization.

"The biggest thing that helped us with the adoption was we got a really great account manager at SafetyChain and she helped us through it. She made our lives easier, and helped us make our process logical."

—Anthony Villaloboz

"When we decided to go digital, one of our best plant operators was adamantly opposed. But he actually became a great advocate. The ability to have access in real time to records so that you know what happened five minutes ago—or yesterday—is just incredible."

—Rudy deWit

"There are folks in production who are just not quite ready to let go of their old habits and they like that paper and pen immediacy. Moving to tablets was a bit of a change for them. But now that they've had a chance to get used to it, it's become the new normal. It's a lot easier. It's a lot less clutter. It's a lot less data entry after the fact. We're saved from spending really boring man-hours re-entering data that's on a piece of paper."

—Madison Maxwell

Technology's Impact and Return on Investment

The common theme for these three food producers—and with other SafetyChain customers—is that with technology, they are able to unleash the power of one of their company's greatest assets: information.

With immediate access to historical operational data from five minutes ago, last week, or last quarter, for example, customers are accomplishing things they couldn't do before. Anthony at Bobby Cox noted he can log in to SafetyChain on his phone from anywhere to review activities occurring in his facility, up to the minute. His team no longer relies on reports or team huddles to share information, the centralized repository of operational data keeps everyone on the team up to date on facility activities. When there is an issue, key stakeholders are automatically notified by the system.

Now that Thresher is less dependent on paper for data collection, Rudy sees a tremendous time savings. He estimates that the time saved by going mobile with data collection in his facility would add up to a half to full time employee. Thresher's implementation of photo capture to document cleaning has also helped contribute to a significant reduction in downstream complaints regarding condition of rail cars used to transport outbound product. He's so impressed with the results that he plans to go paperless for the remainder of his operational processes.

Madison spends much less time managing supplier compliance for her company's GMO-certification program. Now, when Roots Hummus prepares for an audit of their GMO program, all of the records and files that support the program include the pertinent information on supplier documentation and compliance.

"Before, when we had one single paper file, only one person could get to the data at a time. Now, everyone involved can see those files concurrently. Everyone knows exactly what's happening in real time."
—Anthony Villaloboz

"All of our records are now time and date stamped, and they've been approved by somebody with approval authority. This has really reduced our downstream complaints."
—Rudy deWit

"The biggest takeaway here, at least for us, is we are now able to really know who's doing what and when it's getting done exactly down to the minute. I really like the immediacy of reporting. It's one thing that we've traditionally had issues with is communication between departments."
—Madison Maxwell

How SafetyChain Automates FSMA Food Safety Plans

With its comprehensive real-time data collection and automation tools, SafetyChain allows companies to automate their FSMA Food Safety Plans in the following ways:

▶ **Holistic Approach to Managing FSQA Operations.**

At SafetyChain, we understand the complexities, challenges, and business drivers of FSQA operations. As a result, we designed a comprehensive solution that ties together all essential components needed to help FSQA operations optimize performance and achieve better results.

▶ **Real-Time Data to Drive Better Everyday Results.**

SafetyChain's FSQA solutions help automate program execution and deliver real-time data intelligence as well as provide a centralized records repository—all essential components to optimizing day-to-day operations.

▶ **Continuous Improvement.**

We continuously improve our solution based on the evolving needs of our customers and the industry.

▶ **Full Service Delivery Model.**

We work with every customer to configure SafetyChain to meet their specific needs.

▶ **Dedicated Customer Success Team.**

We provide ongoing system guidance, updates, and support to ensure optimal system usage and continued success.

Summary

The customer stories we've shared illustrate the benefits of switching from paper to technology. To leave you with some actionable takeaways, let's take a moment to review some key points made by our customers:

▶ **Technology is here to stay.** The food industry is rapidly moving toward technology to manage food safety and quality data. Technology provides operational efficiencies, transparency, and visibility into food safety and quality operations in ways that paper simply can't.

▶ **Technology isn't limited to mobile forms and checklists.** Efficient form design complements an operation's production workflow. Automated role-based program task alerts are pushed out via emails and mobile app. Program dashboards empower users to help monitor tasks and identify and manage issues. Photos are another tool that can be leveraged to capture and communicate problems or document compliant conditions.

▶ **Technology has a huge impact on companies' bottom lines.** Impact on the company is significant with time savings, ability for all stakeholders to have real-time oversight on facility activities from anywhere, to immediate insight on what challenges and trends are occurring in production environment and the freedom from a need to hunt for data or paperwork. Customers report more efficient management of food safety programs and more streamlined preparation for audits. They also gain peace of mind, knowing that the technology includes alerts and notifications and there is a centralized, single source of information for teams to address issues before they become bigger problems.

Food safety and quality data is one of the greatest resources your company has, but if it is being collected via paper forms or in different systems, chances are your team is not getting the program visibility and data intelligence needed to achieve better results. With the ability to access the information that's most important to you in real time, you can enhance visibility into program compliance, eliminate the need for labor and paper-intensive data management processes, save time, and manage issues at the earliest point possible to gain operational efficiencies. Efficiencies to achieve better everyday results, protecting your brand and bottom line.

About SafetyChain

SafetyChain gives over 2000 process manufacturers the flexibility to rapidly address urgent challenges while offering scalability to expand and drive long-term value.

Capture All Critical Data
- Gain real-time visibility into what is happening throughout the facility
- Eliminate organizational silos made worse by competing data sources
- Feel confident your teams are relying on consistently accurate data

Gain Plant-Wide Insight
- Know at-a-glance whether you're hitting your metrics
- Pinpoint areas of improvement to reduce waste, increase yield, and maximize throughput
- Better understand how your teams are performing to create labor efficiencies

Take Rapid Action
- Save time and ensure you're always audit-ready
- Eliminate guesswork so everyone knows what they need to do and when
- Increase efficiency and foster a culture of problem-solving

Plan Scalable Growth
- Drive change, not disruption, throughout your plants
- Ensure the short-term and long-term success of your implementation
- Justify current and future technology investments by reducing waste and increasing productivity

Explore the Plant Management Platform and see how digitized plant management can meet your needs.

Learn more at https://safetychain.com/products/digital-plant-management/