



# Transforming Field Operations with Be the Light (BTL) and ACT Reports

Evidence of Success



2024

# OVERVIEW

## Transforming Field Operations with Be the Light (BTL) and ACT Reports



### BACKGROUND

A leading energy utility embarked on a transformative journey to enhance transparency, collaboration, and accountability across its field operations. By implementing the Be The Light (BTL) daily reports and the Accountable, Collaborative, and Transparent (ACT) monthly summaries, the organization has improved its ability to monitor field activities, measure contractor performance, and make data-driven decisions.

This case study explores the challenges faced, the solutions provided through the BTL and ACT initiatives, and the resulting positive impacts on field performance and organizational culture.

# CHALLENGES

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Field operations often face numerous complexities, particularly as organizations grow and evolve. This utility's journey was no exception.

## **Inconsistent Reporting**

The organization's growth through acquisitions resulted in a patchwork of reporting practices across different regions. Inspectors often relied on outdated, free-form text reports that lacked standardization, leading to significant variability in the level of detail and relevance provided. This inconsistency made it difficult to aggregate data meaningfully. Without a structured reporting system, the leadership struggled to ensure that all field activities were accurately documented and actionable insights could be derived.

## **Lack of Visibility**

Field supervisors and leadership operated with limited access to real-time information, creating delays in identifying and resolving critical issues. The lack of immediate insights into field activities meant that problems often escalated before being addressed, impacting safety, quality, and productivity. Additionally, there was no systematic way to track contractor performance consistently across projects. This gap in visibility left leadership in a reactive position rather than being able to proactively guide field operations.

## **Limited Collaboration**

Inspectors and contractors frequently worked in silos, with minimal alignment on expectations, benchmarks, and performance standards. The absence of clear communication channels and regular feedback loops often resulted in misunderstandings or missed opportunities for improvement. This lack of collaboration hindered efforts to establish a unified culture of accountability and continuous improvement.

# SOLUTIONS

We worked closely with our client to customize a reporting system that directly addressed their unique needs. The tailored Be The Light (BTL) reports and Accountable, Collaborative, and Transparent (ACT) summaries were developed to streamline operations, create consistency, and provide actionable insights that aligned with the client's goals.

## DAILY BTL REPORTING

The Be The Light (BTL) reports were designed as a comprehensive, digital platform to transform how field data was captured, communicated, and acted upon. Recognizing the need for real-time visibility, the BTL system provided leadership with immediate access to detailed field insights, enabling them to monitor operations proactively.

A key feature of the BTL reports was the introduction of structured templates that standardized reporting across all regions. These templates ensured consistency in documenting critical elements such as safety checks, project milestones, and compliance metrics. This uniformity eliminated the variability caused by free-form text reports, which often lacked clarity and detail.

By streamlining the reporting process, BTL reports significantly reduced the risk of miscommunication and improved the accuracy of information flowing from the field to leadership. The real-time functionality of BTL reports further elevated their impact. Field data was captured and shared instantaneously, allowing supervisors to address potential issues promptly. This shift from reactive problem-solving to proactive issue management enabled the utility to maintain high safety and performance standards while minimizing delays. The BTL reports became a cornerstone of the client's field operations, aligning daily activities with organizational goals.





# ACT SUMMARIES

The ACT summaries were designed to complement the BTL reports by aggregating their data into monthly roll-ups. These summaries provided leadership with clear insights into safety trends, quality performance, and contractor evaluations. The ACT summaries served as a foundation for identifying recurring patterns, prioritizing areas for improvement, and allocating resources more effectively. They also supported quarterly contractor reviews by providing structured insights into performance metrics, fostering a culture of accountability and mutual trust. Moreover, these summaries highlighted both successes and opportunities for growth, reinforcing a constructive feedback environment.

## CUSTOMIZATION & SCALABILITY

The reporting system was fully customized to align with the client's operational processes and organizational goals, ensuring seamless integration with existing workflows. A phased rollout strategy was implemented to allow gradual expansion, with lessons learned from the pilot phase informing broader deployment. Scalability was a key consideration, enabling the system to adapt to regional needs and diverse team dynamics. Additionally, plans were developed to integrate the customized tools with other internal reporting systems, laying the foundation for a cohesive and unified digital framework.



## CHANGE MANAGEMENT

A thoughtful change management strategy was integral to the success of the new reporting tools. Implementation began with a pilot program involving a focused group of inspectors, allowing iterative improvements based on real-world feedback. Comprehensive training sessions were provided to ensure alignment across all stakeholders, including internal teams and contractors, on the expectations, standards, and benefits of the system. To further encourage adoption, ongoing coaching and support were offered, enabling teams to confidently use the tools and fostering broad buy-in for the initiative.



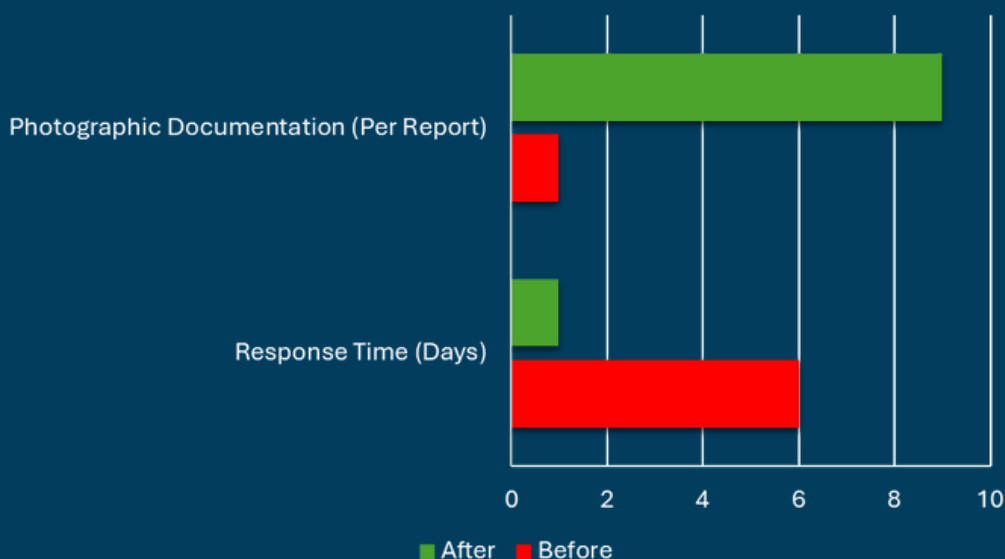
# RESULTS

The implementation of the Be The Light (BTL) reports and Accountable, Collaborative, and Transparent (ACT) summaries delivered transformative results, fundamentally improving the utility's field operations and organizational culture.

## Improved Transparency

Real-time data enabled supervisors to address issues proactively rather than reactively. Photographic documentation reduced the need for physical re-inspections

### Improved Transparency: Before vs. After BTL/ACT



## Enhanced Collaboration

Regular feedback loops fostered a culture of continuous improvement between inspectors and contractors. Celebrating positive behaviors reinforced a constructive and safety-focused culture.

# RESULTS

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## DATA DRIVEN DECISION MAKING

ACT summaries identified trends, enabling targeted interventions to improve contractor performance. Contractors gained clear visibility into performance metrics, fostering accountability and mutual trust.

## SCALABILITY AND CONSISTENCY

A phased rollout approach ensured lessons from the pilot phase informed broader implementation. Plans to align internal reporting tools with digital standards are underway, further unifying operations.



# CLIENT FEEDBACK

The feedback we've received highlights the significant value of the Be the Light (BTL) and ACT reports in enhancing transparency, collaboration, and data-driven decision-making across our client's field operations.

## QUOTES FROM THE CLIENT

"The ACT report provides much more information from day-to-day inspections in the field. We can identify trends and be proactive instead of reactive."

"It's more data than we've ever had, and it's available in a much more realistic timeframe. We can measure performance, identify trends, and make informed decisions faster than ever before."

"The Be the Light report has become a critical tool for us. In a short timeframe, it's integrated into our processes, demonstrated its value, and allowed us to build a consistent model."

"We're identifying trends so we can focus on improvements with contractors that may be underperforming, while also sharing positive trends to build the culture we want."