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March 25, 2009

Initiating and Sustaining Ergonomics Interventions in Decentralized Organizations

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Introduction:

- Sean P. McDonald, MS, CPE
 - Vice President of Workforce Strategies at Marsh
 - MS in Occupational Ergonomics
 - 12 years in casualty risk consulting
 - USACHPPM
 - Aberdeen Proving Grounds, MD
 - Workers Compensation Carrier
 - Financial Institution

Presentation Goals:

- Illustrate successful private sector ergonomics and safety partnerships with Marsh
- Link similarities between Department of Defense ergonomics initiatives and insurance driven ergonomics
- Present an emerging idea for managing ergonomics/safety requests in an environment with a decentralized work force: A Call Intake System
- Discuss additional best practices for sustaining and enhancing ergonomics in a large organization.
- Questions

Where Do We Go?

Prioritizing Efforts

- Data driven
- Workers' compensation data exposure mapping
 - Injury frequency, severity, total incurred, loss trending, injury rates, readiness (unit status reports)
- Ergonomics Gap Analysis:
 - In depth review of safety and ergonomic policies and procedures.
 - Review of past injury data.
 - Interview with all levels of staff within and organization.
 - Comparison to data of industry best practices in several categories
 - Management commitment
 - Training
 - Incident reporting and tracking
 - Medical management
 - Process management
 - Employee involvement
 - Ergonomic analysis process





Where Do We Go?

Prioritizing Efforts

- Workers' Compensation Loss Profile
 - Comprehensive analysis of workers compensation data
 - Comparison to similar industry codes and/or Marsh clients
- Find the common language that is most powerful in your plant, office, region, organization, base etc.
- Continuous Risk Improvement (CRI) will lead to exposure or initiative driven efforts in the future.

Delivering Effective Ergonomics: Large Client Example

- Targeted 30 locations
- Status of ergonomics/safety at each location
 - Site audits
 - Past efforts
 - Training
 - Ergonomics/safety priority?
- Create ergonomics/safety committees
 - Portal to infiltrate a location
 - Catalyst for instilling energy into the ergonomics/safety program
 - Committee training
 - Resource development: intranet, desk drops, etc.
 - Monitor best practices
 - Site tours, accident investigation, meeting minutes, and issue resolution



Delivering Effective Ergonomics:

Large Client Example: Sustaining Efforts

- Provide ongoing support and monitoring to site committees
 - Routine best practices reminders
 - Recognition within and entire organization
 - Seasonal initiatives: Office workstation arrangement, slip/trip/fall prevention, hazard communications, back safety/stretching, etc.
- Monitor the initial data
 - Continuous Risk Improvement
- Enhance Ergonomics and Safety Capabilities
 - Call Intake System

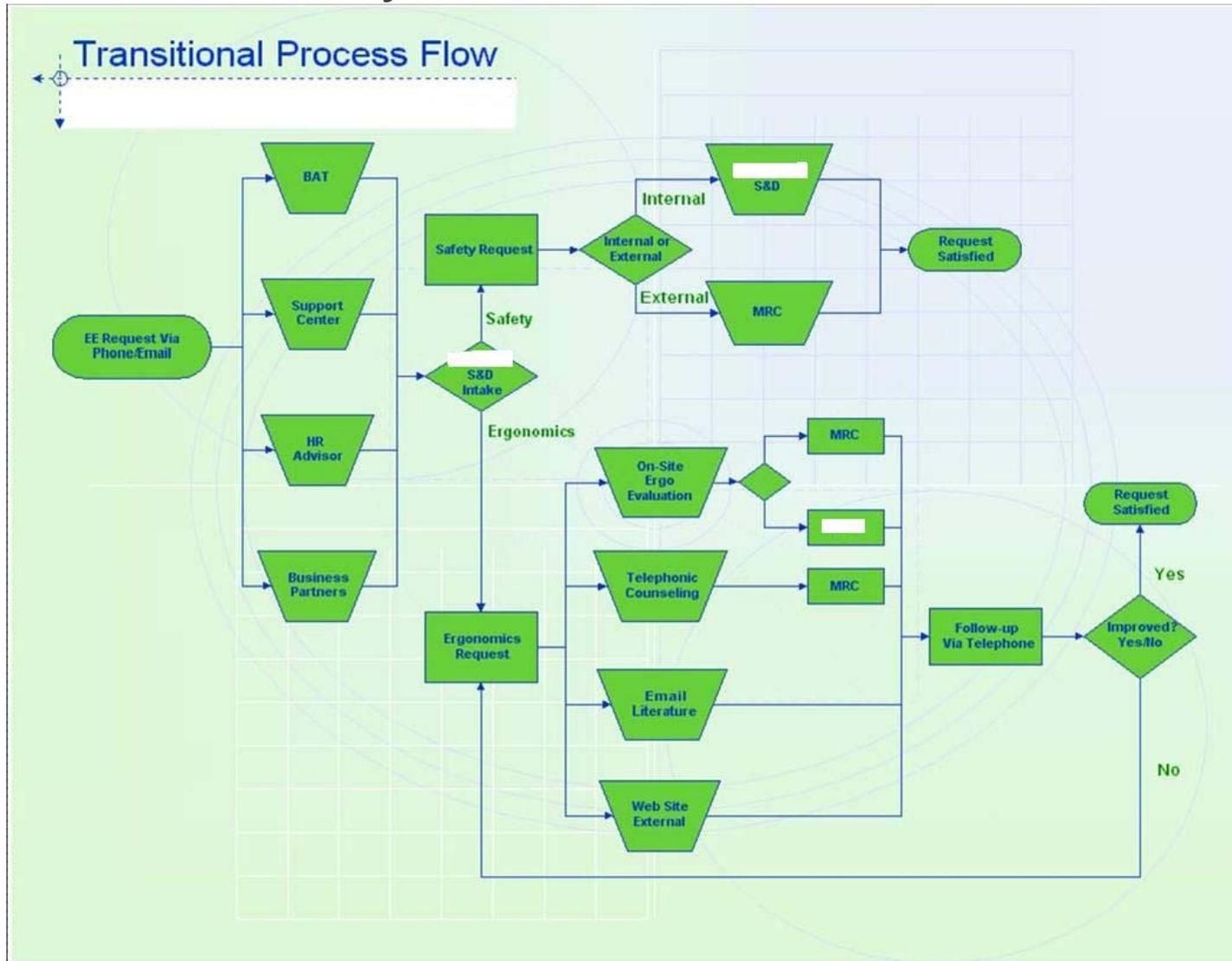


Ergonomics Enhancements:

A Call Intake System

- Technology advancements (laptops, PDAs, cell phones)
- A more distributed workforce exists
- Greater expectations from management and employees
- Ergonomics and Safety methods need to keep up with changes and demands
 - Collaborative efforts, self help, and maximizing minimal resources.

Ergonomics Enhancements: A Call Intake System



Ergonomics Enhancements: A Call Intake System

Intake Form

INTAKE Intake ID [] Name [] Find By: ID Last First

Questions Demographics Action Plan Follow-up Billing Information

Insert Now Date: 6/3/2004 Time: 2:05 PM

What does your call concern? Ergonomics

Question	Response:
How would you rate your discomfort?	Severe
In what primary area of your body do you experience discomfort?	Shoulder
How would you describe your work area?	Standard Office Cube

New Intake ← → Detail Report E-mail... ↶ Close Intake Form

Record: 1 of 85

Ergonomics Enhancements: A Call Intake System

The screenshot displays a software window titled "Intake Form". At the top, there is a search bar with the word "INTAKE" in large letters, followed by fields for "Intake ID" and "Name". To the right, a "Find By:" dropdown menu is set to "ID", with "Last" and "First" as other options. Below the search bar are several tabs: "Questions", "Demographics", "Action Plan" (which is currently selected), "Follow-up", and "Billing Information".

Under the "Action Plan" tab, there is a section titled "Suggested Action Plan:" containing a text box with the following text: "Send documents 1,2 and 3. This action plan includes an Ergonomics Evaluation. Please obtain managers approval for a [] to [] charge. A follow-up call is suggested in 7 days. Please set a reminder on the follow-up tab." To the right of this text is a list titled "Suggested Action Items" with a vertical scrollbar. The items in the list are: "Email of Fax: 2-Office Ergonomics Guide", "Email or Fax: 1-Workstation Evaluation Checklist", "Email or Fax: 3-Advanced Troubleshooting Guide", "Have Safety Product Manager Schedule Ergonomics Evaluation", "Obtain Manager Approval for Ergonomics Evaluation", "Request Return of 1-Workstation Evaluation Checklist (72 hrs)", and "Schedule: Follow-up Call".

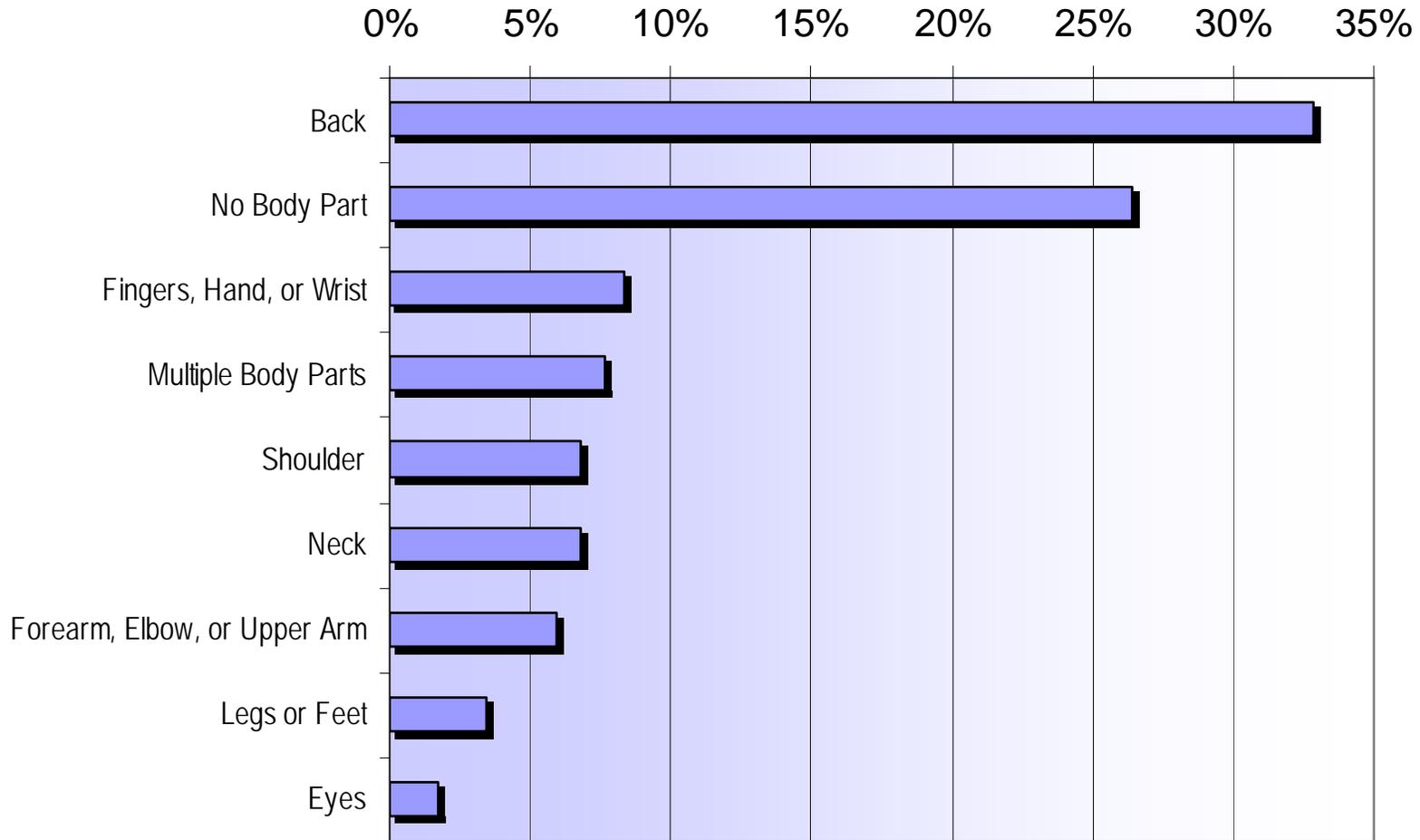
At the bottom of the window, there is a navigation bar with buttons for "New Intake", left and right arrow buttons, "Detail Report", "E-mail...", a refresh button, and "Close Intake Form". Below the navigation bar, a status bar shows "Record: 1 of 85" with navigation icons for first, previous, next, last, and search.

Ergonomics Enhancements: A Call Intake System

Intake Detail

John Doe		IntakeID 185	Intake 10/4/07	Complete		
Demographics						
Work	Ext.	Alternate	Ext.	Email	Referral Source	Manager's Contact Info. Name Sue Smith Phone Ext. (704) 666-6666 66666 Email sue.smith@
(704) 444-4444	44444	(704) 555-5555	55555		HR Support Center	
Full Address			Location Name		Location ID	
128 S Tryon St, Charlotte, NC 28202			First Citizens		NC224	
Title	Emp. No.	Department Name		Business Unit		
Assistant Analyst	1234567890	Bank Operations		Corporate & Investment Bank		
Notes: John will return his workstation self evaluation form.						
Questions						
Category	Question			Response		
Ergonomics	How would you rate your discomfort?			Severe		
	In what primary area of your body do you experience discomfort?			Back		
	How would you describe your work area?			Standard Office Ctr		
	Has your doctor recommended that you receive an ergonomics evaluation?			Yes		
Action Plan						
Action Instructions		Suggested Action Items				
Send documents. A doctor has requested an ergonomics evaluation. Please obtain managers approval for a change. A follow-up call is suggested in 7 days. Please set reminder on the follow-up tab.		Email or Fax: Safety Prevention Principles Obtain Manager Approval for Ergonomics Evaluation Request Return of Workstation Evaluation Checklist (2 Lists) Schedule: Follow-up Call				
Follow-up						
Date	Time	Action Subject	Notes:			
10/4/07	2:59 PM	Contacted Sue Smith for Eval approval	She indicates that she will get back to me within a week.			
10/4/07	2:58 PM	Set workstation self evaluation form	John to return the form by Monday			
10/4/07	2:56 PM	Set follow prevention principles	Instructed to review with manager			

Ergonomics Enhancements: A Call Intake System



Ergonomics Enhancements:

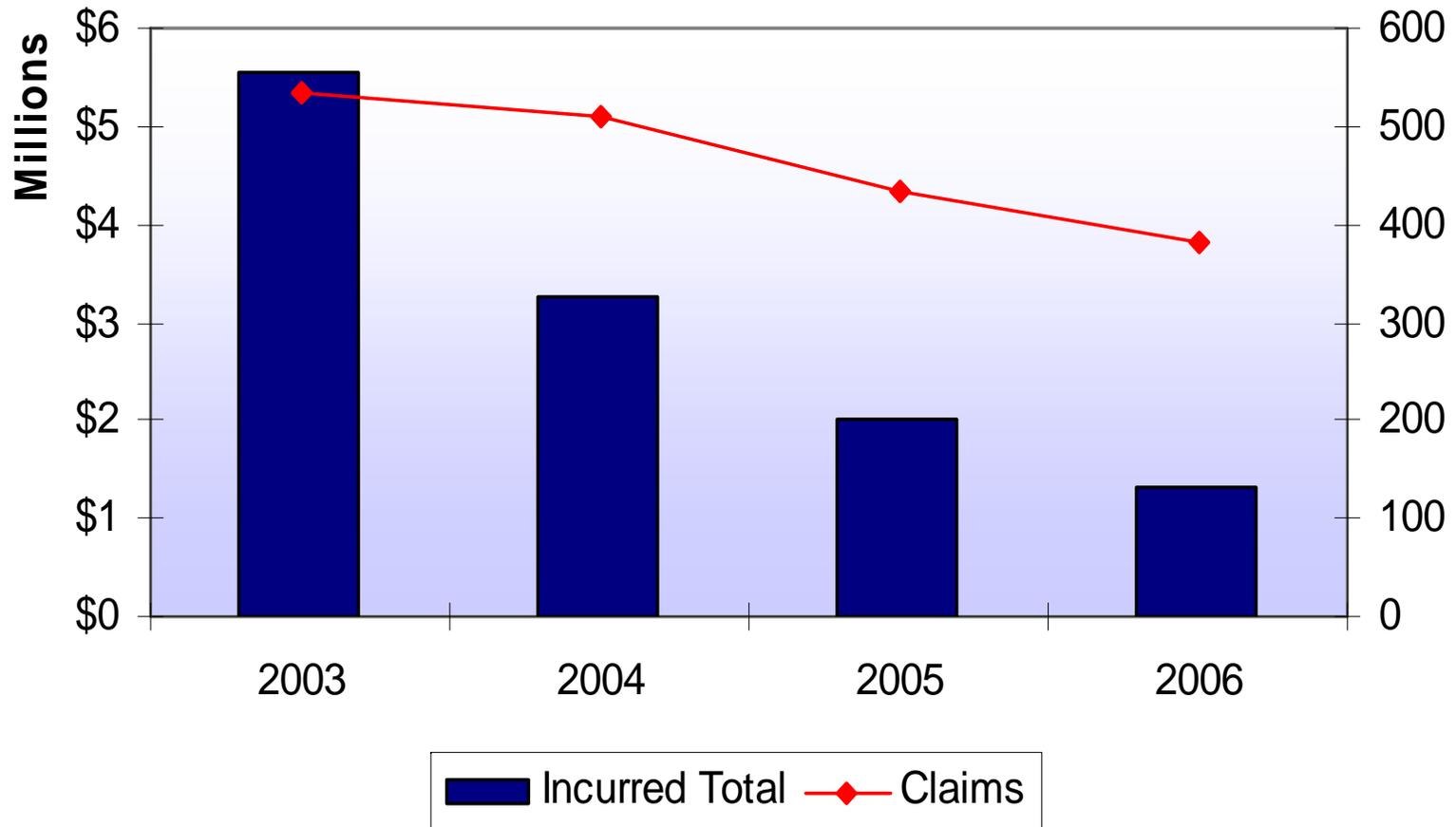
A Call Intake System

- How successful has the system been for one client?
- Perceived Discomfort Improvement
 - Intake average initial score of 5.3 to follow up of 2.4 on 10 scale @ 3 week follow-up QA

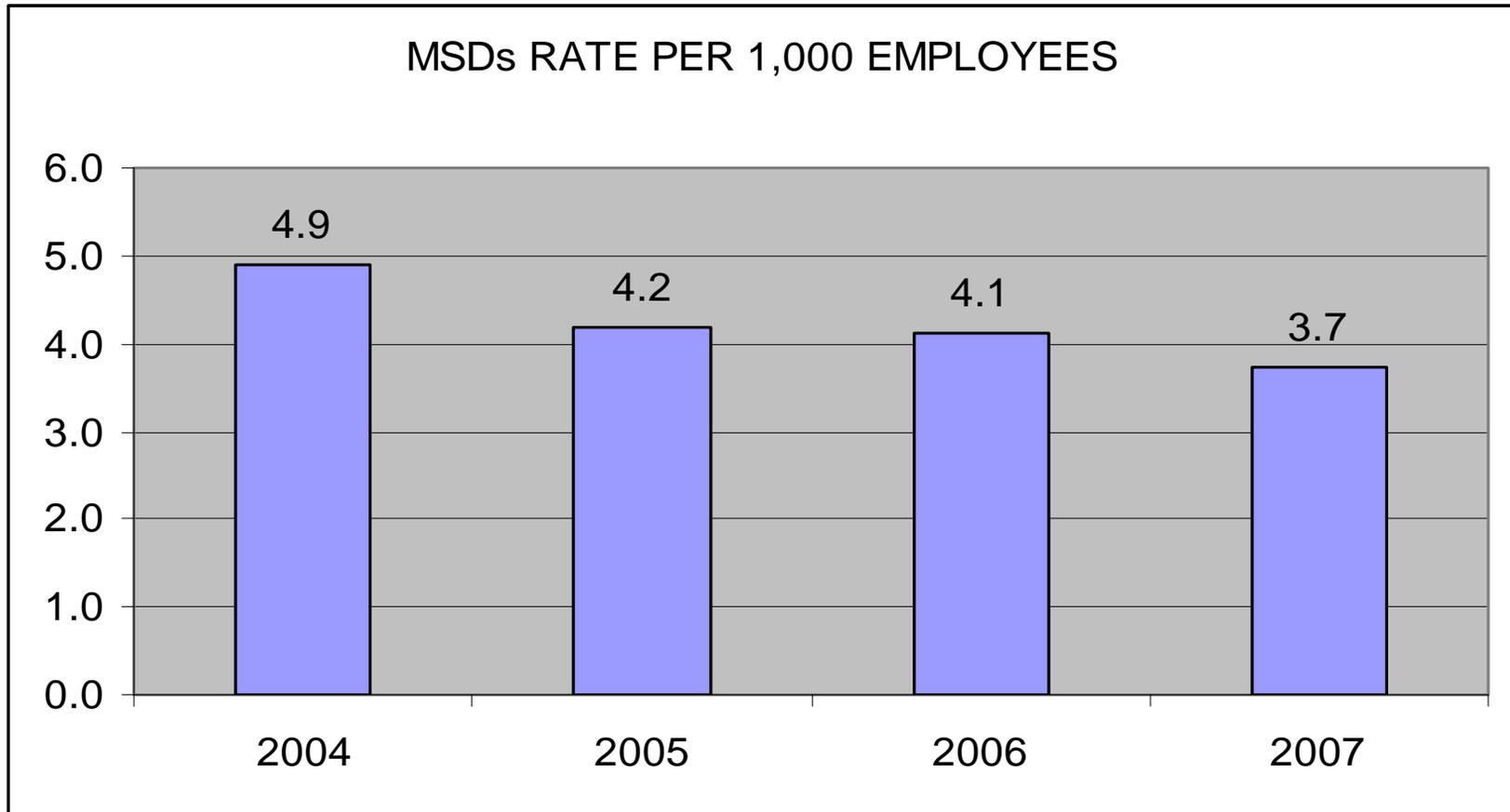


Ergonomics Enhancements: A Call Intake System

MSD Claims & Costs



Ergonomics Enhancements: A Call Intake System 25% Reduction in Musculoskeletal Disorders

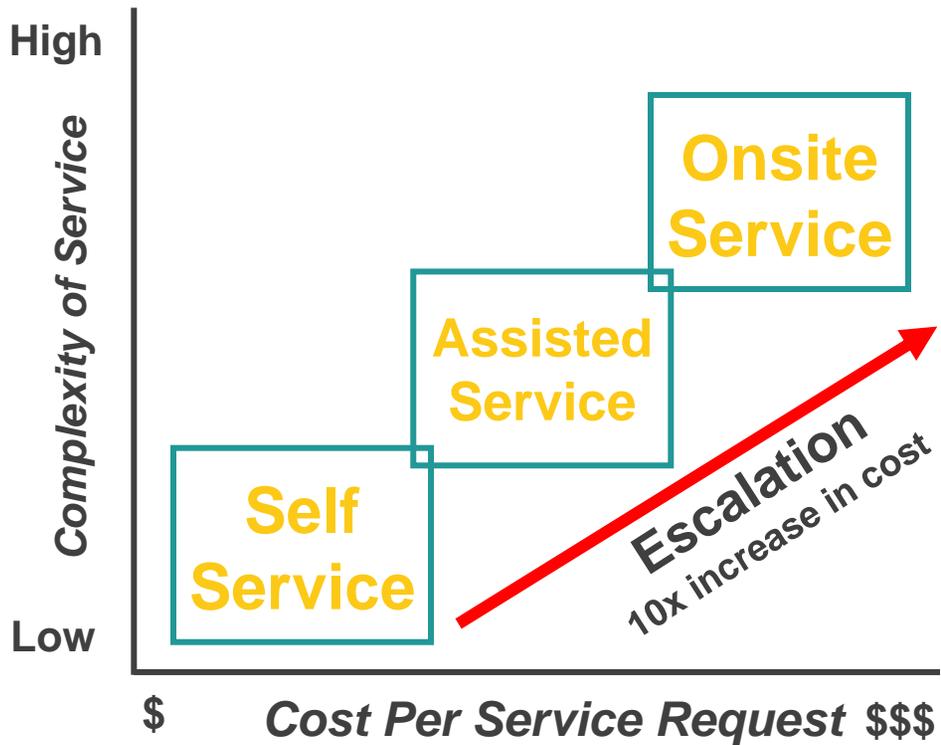


Ergonomics consultation initiated in January 2004

Ergonomics Enhancements: A Call Intake System



Ergonomics and Safety Service Delivery Spectrum



Service Channel	Interaction Channel Examples	Process Examples
Self	Web based	Education and customized response
Assisted	Call Intake, Email, Chat	Telephonic Ergonomics Evaluations
Onsite	Face to Face	On-site Evaluations

Ergonomics Sustainability:

Design and Purchasing Guidelines

- Frustration with products?
- Design Guidelines:
 - Ensure functionality component vs. just cost, vendor relationships, and relying on old decision matrices
 - Engage the end user
- Purchasing Guidelines
 - Client controlled vs. vendor controlled
 - Ergonomics evaluator product pick lists comprised of most functional with cost/relationships secondary



Ergonomics in Decentralized Organizations: Closing



Ergonomics in Decentralized Organizations: Questions



 **Thank You!**

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