

## PHA Mentoring & Leadership Skills Training

### The Challenge

PHA Facilitation requires both knowledge of the mechanics of conducting a PHA and the leadership skills to manage a team. Clients sent staff to standard 2 - 5 day PHA training classes which focus mainly on the methodology with limited time for hands-on practice and feedback to newly trained facilitators. Newly trained staff understood the basics of facilitation yet required additional skills to manage multi-cultural, multi-disciplinary teams. They also wanted additional assistance with understanding the keys to quality documentation.

### Client Description

<b>Company</b>	Multiple Global
<b>Project Location</b>	Multiple sites
<b>Industry</b>	Chemical, Food, Agribusiness, Oil
<b>Annual Revenues</b>	\$20+ Billion
<b>Employees</b>	10,001+ employees
<b>RISK, Inc. Solution</b>	PHA Mentoring & Leadership Skills

### The Solution:

We worked with several clients to provide next level PHA skills training; both through augmenting PHA skills learned in standard training classes and by offering personalized, onsite PHA training. In all cases it began with discussions to understand their specific needs so we could provide the best solution for their team.

### Augmenting PHA Skills

For clients where staff had attended a standard PHA training and understood the mechanics of facilitating PHA sessions, several wanted additional training on how to better manage a team. As it is the facilitator's role is to help a team navigate a PHA, it is important for the facilitator to understand both the methodology and have the leadership skills to do so successfully.

Successful leadership of multi-disciplinary and often multi-cultural teams requires soft skills. Soft skills are defined as the personal attributes that enable someone to interact effectively and harmoniously with other people. Specific examples in a PHA include working with varying personalities, such as dominant or reticent team members. Other examples of soft skills a PHA leader requires include ways to manage challenges like sidebar discussions, and conflict. Additionally, they have to use their skills to encourage the 'out of the box' thinking that is so valuable in a PHA.

Clients also benefitted by gaining a deeper understanding of quality documentation with a focus on best practices for documenting causes, consequences, safeguards and recommendations.

### Approaches included:

- In several cases, our team worked with client staff during a week of PHA sessions, first demonstrating by leading a few PHA nodes, then observing the new facilitator(s) as they lead some nodes. We provided feedback to the new facilitator, answered questions that came up, and continued mentoring and coaching throughout the week.

- In other cases, we provided custom training for several PHA facilitators that had attended an outside PHA training class and were having difficulty successfully implementing what they had learned. We developed a custom class with in-depth mock PHA sessions to focus on leadership soft skills and quality documentation. Because the training was hands-on, it also provided an opportunity to use their own PHA software and other PHA software to experience the pros and cons of each.

### Custom PHA Training

For clients where staff had not attended external PHA training we developed a class that included PHA methodology with extensive hands-on training and mentoring as well as leadership soft skills. We used examples from their sites and PHAs as the basis for mock PHA sessions that would be relatable to the training team.

Some clients also requested PHA software training be incorporated into the class. For those clients we created a generic template in PHAPro or PHAWorks (depending on which software the site used) and used that template in the training sessions.

### **The Result:**

Clients gained PHA team leaders with greater skill and thereby greater confidence in facilitating their site PHAs and managing their teams. Site PHAs ran smoother and improved in quality with a better understanding of how detailed documentation provides a clearer picture of hazards and safeguards.

The use of software tools during the training session led to a better understanding of how to use those tools to provide faster documentation during sessions. In some cases, it led to sites upgrading their software tools.

We initially developed a PHA Facilitator tip sheet for one of the first PHA facilitators we worked with. Those concepts have since been developed into a PHA e-book and webinar series.

### **What our clients are saying about our PHA training:**

“Thanks again for creating the PHAWorks template specific for our company, this will be quite helpful moving forward. I’ve received a lot of positive feedback from the PHA training course, including ‘the most interesting and relevant course I’ve taken since I’ve been in industry’. Rene’ really did a wonderful job keeping everyone focused and engaged.... If I could only do that during my HAZOP’s!” Senior Process Engineer, industrial gas supplier

“Please let Rene’ know that her use of PHAPro during the training helped convince our management to upgrade our software. We saw how it could save hours of team time” Process Engineer, manufacturing corporation

*Do you need training or support for your PHAs?*

Contact us at [info@psmrisk.com](mailto:info@psmrisk.com) or

Call us at 510-828-7228 to talk about your needs