



Checklist

7 Signs You've Outgrown Your **Legacy EHS System**

and Evaluation Checklist

You implemented your EHS platform with the best intentions. It was going to centralize your data, streamline your processes and give you the visibility you needed to drive real improvements. **And maybe, for a while, it did.**

But somewhere along the way, things changed. Your organization grew. Regulations shifted. New sites came online. And the platform that once felt like a solution started to feel like another problem to manage.

Now you're spending more time working around your software than working in it. Your team has stopped logging incidents the way they should because the system is too

slow or doesn't work on their phone. You've put in request after request for changes that either take months to deliver or come with a price tag you can't justify. And when leadership asks for a clear picture of your organization's EHS performance, you're not confident in what you're handing them.

If this sounds familiar, you're not alone.



This guide walks through the most common signs that your EHS software has reached its limits, and what each of those pain points should tell you about what to prioritize when you start evaluating what comes next.



Signs You've Outgrown Your Current EHS Platform

1 Your team isn't using it.

Low adoption is one of the clearest indicators that a platform has failed. When a system is slow, difficult to navigate or doesn't function well on mobile, employees find workarounds or skip it altogether.

 Look for:

A mobile-first platform built for the people doing the work.

Prioritize intuitive design, fast load times and purpose-built mobile functionality, including features like voice-to-text reporting. During your evaluation, ask to see the mobile experience and, if possible, get your frontline team involved in testing it.

2 Your data can't be trusted.

Poor data quality is rarely the result of one thing. It's the cumulative product of low adoption, inconsistent processes and fragmented systems. When your team questions the accuracy or completeness of what's in the platform, it undermines your ability to identify trends, report to leadership with confidence and demonstrate compliance.

 Look for:

A platform that standardizes how information is captured across your organization.

This reduces opportunities for manual error and makes it easy for users to do things the right way the first time. Ask vendors how the system guides users through data entry and what controls exist to improve consistency.

3

Your tools are scattered.

Incidents in one platform. Audits in another. Training records in a spreadsheet. Contractor management handled somewhere else entirely. The administrative overhead of maintaining multiple systems is significant, but the bigger cost is visibility. When critical EHS data lives across disconnected tools, you can't identify patterns across processes you can't see together.

 Look for:

A single platform that covers the full breadth of your EHS program.

Consolidation reduces the integrations you have to maintain and gives you a unified view of performance across functions. When evaluating options, map out every process and data source your team currently manages and consider whether a prospective platform can genuinely replace them.

4

Your customizations have become a liability.

Heavy customization is often a sign that a platform was never quite the right fit to begin with. Over time, layers of modifications can make a system rigid and brittle to the point where even minor process changes become major projects.

 Look for:

A platform that is configurable by design, not one you'll need to customize your way into usefulness.

There's an important distinction between the two. True configurability means your internal team can update forms, adjust workflows and build new processes without developer resources or vendor support. Ask prospective vendors to walk you through how a specific process change would be made, including who does it, how long it takes and what requires their involvement.

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You're dependent on your vendor for basic changes.

Even if your platform isn't heavily customized, if routine updates require a support ticket and a wait time, your software is slowing you down. For organizations operating across multiple regions, this becomes a compliance risk: when regulatory requirements shift, you can't afford to wait on a vendor queue to adapt your processes.

 Look for:

Self-sufficiency as a non-negotiable.

Your team should be able to make changes internally, on their own timeline, without incurring additional costs. Ask vendors specifically what requires their involvement versus what your team can do independently. The ability to maintain and evolve the platform without relying on external support is one of the clearest indicators of long-term value.

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Getting insights requires additional tools.

If meaningful reporting requires exporting to Power BI, building custom reports in Excel or relying on a data analyst to interpret what your platform produces, you're adding cost, complexity and latency to your decision-making.

 Look for:

Built-in analytics.

Dashboards should surface the metrics that matter without requiring custom configuration or additional software. More advanced platforms now offer AI-driven insights that proactively identify trends, surface anomalies and flag emerging risk patterns. When evaluating analytics, ask to see real reports, not just screenshots. Understand who can build them, how long they take and whether your team can do it without outside help.

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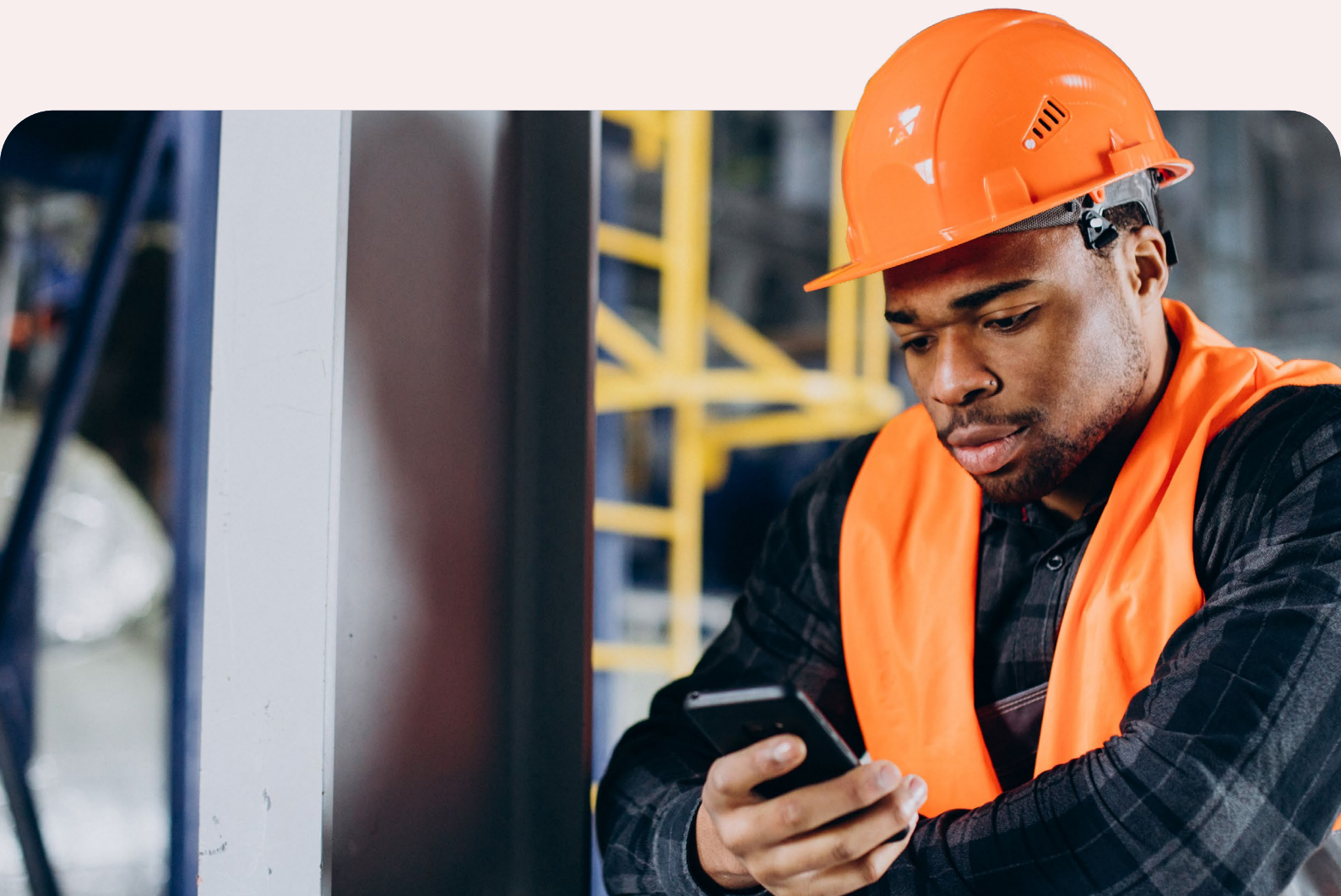
Your system can't scale with your organization.

Growth exposes gaps. Acquisitions, new sites and expansion into regions with different regulatory requirements put pressure on EHS systems in ways that aren't always visible. If onboarding a new business unit requires significant manual effort or custom workarounds, your platform isn't built for where your organization is headed.

 Look for:

A platform that scales both technically and operationally.

Technically, it should support new users, sites and geographies without degrading performance. Operationally, it should support the process flexibility needed to manage different regulatory environments and business unit requirements within a single system. Ask vendors directly how their platform handles multi-site and multi-region deployments and ask for references from organizations at a similar scale and stage of growth.



A Simple Evaluation Checklist

Work through this list as you evaluate each vendor. The right platform won't check every box for every organization, but it should check the ones that matter most to yours. Here is a general list of what you should evaluate:

Usability and Adoption

- Intuitive, modern user interface
- Mobile-optimized experience for field workers
- Voice-to-text and other friction-reducing input features
- Configurable user permissions and role-based access
- Multilingual support for global or multi-region teams
- Ready-made templates for common EHS processes

Modules and Functionality

- Incident reporting and investigation management
- Audit and inspection management
- Risk assessment and hazard identification
- Corrective and preventive action (CAPA) tracking
- Training and competency management
- Permit to work management
- Contractor and visitor management
- Environmental monitoring and reporting
- Chemical and substance management
- Emergency response planning

Configurability and Flexibility

Ability to build and edit forms without vendor support

Workflow configuration by internal teams

Support for multiple business units or site structures

No-code or low-code configuration tools

Analytics and Reporting

Built-in dashboards and reporting tools

Quick, routine data refreshes

Customizable reports without external software

AI-driven insights and trend identification

Exportable reports in multiple formats

Leading and lagging indicator tracking

Integration and Data Management

API integration capabilities

Pre-built integrations with HR and payroll systems

Single sign-on (SSO) support

Data migration support from existing platforms

Centralized data storage

Adherence to data privacy laws and regulations (GDPR, CCPA, etc.)

Compliance and Standards

Support for ISO 45001, ISO 14001 and other relevant standards

Built-in regulatory update management

Clear audit trails and documentation controls

Certificate and license expiry tracking

Implementation and Support

Structured onboarding and implementation methodology

Dedicated implementation support

Training resources for administrators and end users

Ongoing customer success support post go-live

User community or knowledge base access

Vendor and Commercial Considerations

Transparent, predictable licensing model (per user vs. subscription)

No hidden costs for configuration changes or updates

Contract flexibility and renewal terms

Vendor financial stability and product roadmap transparency

References from organizations of similar size and industry

Security certifications (ISO 27001, SOC 2, etc.)

Remember, the right EHS platform should be a tool your team relies on, a source of insight your leadership trusts and a foundation that scales with your business. If your current system is falling short on any of these fronts, it may be time to take a closer look at what's available.

The logo for EVOTIX, featuring the word "EVOTIX" in a bold, white, sans-serif font with a small dot above the 'i'.A rounded rectangular card with a light blue background. It features a map of North America with a red location pin over the United States. The text "US" and "Chicago" is displayed below the map. At the bottom, a white rounded rectangle contains the phone number "+1(872) 215 5913".

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