



 ecoPortal | Lunch 'n' Learn

Be Safe On-Site

A Practical Look at Visitor Management



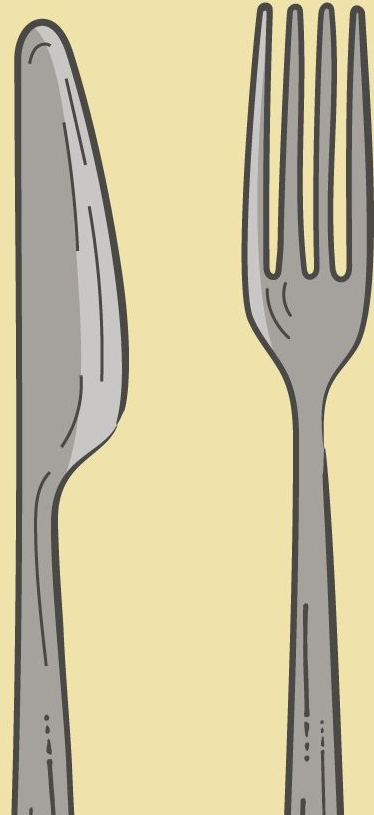
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Agenda

1. Who Does Your Duty of Care Cover?
2. The Problem with Manual & Point VM
3. The Contractor Safety Lifecycle
4. Use Cases & Demo

Have a question during the webinar? Drop it in the Q&A!



————— POLL —————

What are your biggest challenges when it comes to visitor/contractor safety?



Who Does Your Duty of Care Cover?

Under the Health and Safety at Work Act 2015 (NZ) and WHS Act 2011 (AU), **your duty of care as a PCBU extends to every person on your site** – not just your employees.



**Contractors &
Visitors**



Suppliers & Drivers



Maintenance Crews



**Merchandisers &
Landlords**

Everyone who steps on site is under your duty of care.



Where Most Visitor Management Falls Short

When there's no standard process, there's no assurance the process is being followed.

✗ Manual (Pen/Paper)

No verification at check-in

Anyone can write anything, there's no check against qualifications, inductions, etc.

No visibility once they're inside

If the sign-in book is inside the building, it's gone. No live headcount, no accurate evacuation list.

No notifications, audit trail, or data

Nothing to look back on to spot patterns or demonstrate due diligence.

✗ Standalone VM Solution

Digital check-in, but disconnected

There's no connection to your induction or prequalification records.

Signed in. But safe to be there?

Nothing tells you if that person is actually qualified and ready to work.

Compliance lives somewhere else

You still have to cross-reference manually to verify the full picture.

✓ Automated & Integrated

Same process every time

Standardised conditions enforced automatically.

Live visibility from anywhere

See exactly who is on site right now, from any device, without being on-site yourself.

Everyone is verified and protected

Every person is checked against the right conditions before they step foot on site.

25% of our customer base is now using **Visitor Management** as part of their holistic H&S solution.



The Contractor Safety Lifecycle

Let's take a look at our solution



Contractor Safety Management Lifecycle



Prequalification



Onboarding



Contractor Sign-In



Control of Work



Safety And Performance Monitoring

Lifecycle Steps & Module Integration



Contractor Safety Management Lifecycle



Prequalification



Onboarding



Contractor Sign-In



Control of Work



Safety & Monitoring

Use Cases & Demo



Visitor Management Use Cases

USE CASE	FEATURE	BENEFIT	MODULE INTEGRATION	EXAMPLE
Verify a contractor's work order at check-in	Variable Check-in Conditions	Zero manual verification	Contractor Management	A contractor enters their work order number at the kiosk. The system cross-references instantly.
Block entry if a company's insurance has expired	Check-in Requirements	Company-level compliance	Contractor Management	BuildRight's liability insurance expired. The system denies entry and notifies the site manager and lead contractor admin.
Serve site-specific safety information automatically	Kiosk Set-Up > Additional / Register information	Targeted hazard mapping	Hazards & Risks	A visitor checks in at Auckland. They see the Auckland emergency map and site-specific hazards.



Visitor Management Use Cases

USE CASE	FEATURE	BENEFIT	MODULE INTEGRATION	EXAMPLE
Notify the right people the moment someone checks in or is denied entry	SMS (add-on) & Email Notifications	Real-time host alerts	People	A visitor is denied entry at the kiosk. The site manager receives an email and SMS instantly, no need to check the system.
Prompt contractors to check out when they leave the site	Check-out Reminder	Accurate on-site records, automatically	No Integration Required	A contractor leaves the geofenced area at the end of the day. A reminder appears on their app. Your visitor log stays accurate without anyone having to chase.
Check in phone or email	Phone No. vs. Email Identifier	Accessible to everyone on your site	No Integration Required	A courier arrives on site, they choose to enter their phone number to sign-in, as they don't have a work email.



Visitor Management Use Cases

USE CASE	FEATURE	BENEFIT	MODULE INTEGRATION	EXAMPLE
Trigger a check-in from a mobile on arrival	Geofence	Frictionless arrival, no QR code needed	No Integration Required	A regular contractor drives into your site boundary. A check-in prompt appears on their app's home screen. One tap – they're checked in before they've even parked.
Complete a site induction on arrival and check in immediately	Public Induction Form	No prior registration needed	Inductions	A contractor arrives at your building without having completed an induction. They fill in the public form, receive their Job Work Order, and use it at the kiosk to check in.
Send a job work order after induction	COMING SOON Template Workflow	Automated notification, zero manual steps	Inductions	Once an induction is submitted, the system automatically generates and sends the job work order to the contractor.



————— POLL —————

**Does your organisation
currently conduct safety
inductions for contractors
before they access your
site?**



The Induction Gap

Businesses treat employees and contractors differently when it comes to safety inductions.

75%

of businesses conduct safety inductions
for new employees

53%

conduct safety inductions for contractors

That **22-point gap** means nearly half of all contractors step on site without a verified induction, creating risk that is invisible until something goes wrong.

Inductions via Public QR Code for External Contractors

Streamlining contractor onboarding without internal environment access

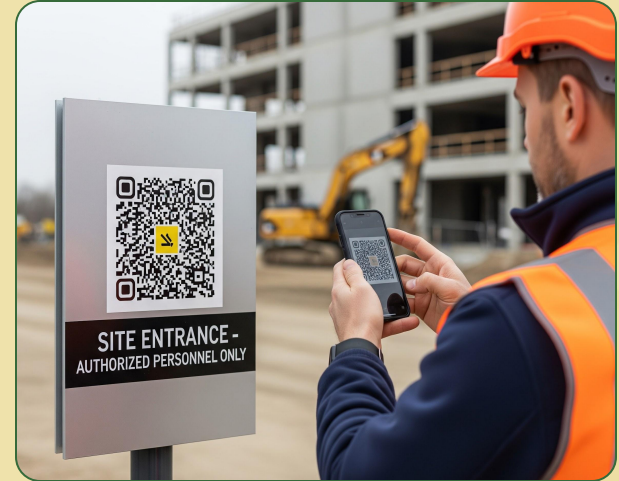
How it Works & Benefits

Process Flow:

- The contractor scans a public QR code to complete their induction via a public form.
- Data collected feeds into a register; the system uses an access code to verify matching information and approval status.

Key Benefits:

- **Autonomy:** Kiosk configuration is done entirely by the customer.
- **Simplicity:** Quick site setup that operates without the need for tablets or printers.
- **Simplified Access:** Eliminates the requirement for contractors to log in to ecoPortal to complete inductions.



Maximising VM Success

Key Considerations for Successful Visitor Management



Start with what matters most: identify your highest-risk visitor type and configure conditions for them first.



Map your visitor types before you configure: knowing who comes through your door and why makes it much easier to set up the right conditions.



Configure for each site, not just each visitor: the same contractor may need different information depending on which location they're visiting.




Schedule a quarterly check-in: set a recurring reminder to review conditions, visitor types, and site settings every few months.





Make check-in part of the onboarding conversation: walk new contractor organisations through the process upfront to save time later.


Identifying Visitor Management Gaps


Where does automation make the biggest difference?

 **Manual verification at the front desk:** check-in processes that depend on a person being present to verify work orders, inductions, or authorisations – creating bottlenecks and inconsistency.


 **Company-level compliance:** situations where individual contractors are checked but their organisation's insurance, prequalification, or work order status is never verified.


 **Multi-site complexity:** organisations managing several locations where safety information, access rules, and emergency maps vary – but the same generic process is applied everywhere.


 **High-friction check-ins:** sites where contractors wait at a physical kiosk or rely on someone at a desk, slowing down arrival and creating workarounds.


 **Inaccurate on-site records:** visitor logs that don't reflect who is actually on-site – because people forget to check out or bypass the process entirely.


VM Configuration Checklist


 **Start with visitor types:** define who comes through your door – contractors, visitors, suppliers, merchandisers – and configure rules for each.


 **Check qualifications, not just identity:** verify that people are inducted, certified, and authorised – not just that they showed up.

 **Think company-level, not just individual:** a contractor may be qualified, but is their organisation prequalified and insured?

 **Use location to your advantage:** serve site-specific safety information, hazards, and emergency maps based on where someone is standing.

 **Remove friction from check-in:** geofencing means contractors check in from their phone the moment they arrive – no QR code needed.

 **Design for error handling:** configure what happens when someone doesn't qualify, automatic denial, notifications, no manual intervention.

 **Build for daily return:** don't re-induct every time. Set up quick automated checks for recurring visitors.

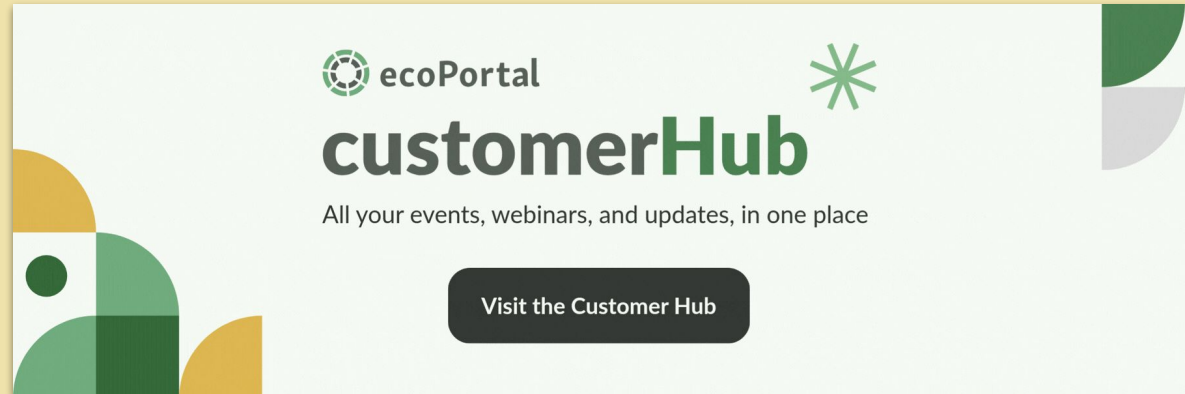
 **Trust your records:** check-out reminders ensure your on-site logs reflect reality – critical during emergencies and billing disputes.



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Book a consultation with Sam

He's an auditor, he's a manager,
he's the coffee bringer — somehow he's also
available for a consultation.

Sam the
H&S Auditor

Sam the
Manager



Sam the
Coffee Bringer

H&S AUDIT CHECKLIST

- Site Access
- Processes
- Risk Controls
- Worker Engagement

Looks good! 😊

You got
this!

Safety
first 😊

Coffee →
Better
decisions
😊



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Got any feedback?
We'd love to hear



Questions?

Enter them into the Q&A tab



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