Empowering the Customer
through Self-service Technology

BY GARY WATKINS

Customer service is an important part of a facility management professional's role. But the growing global trend for self-service technology is revolutionizing that aspect of FM, and with it, the way people select and purchase products and services.

Shoppers now pay for their goods using self-service checkouts; travelers print out their own bus, train and airplane tickets. Hospital patients check in at kiosks, which improves service levels while helping to ensure that patients' data remains secure. Recent hardware trends, including the growth of tablet computer and smartphone use already prevalent in the consumer market, are being deployed by commercial organizations to support self-service working and underpin continuous business operations.

The facility management profession around the world is mirroring this trend, using self service to transform the way in which it operates. By empowering office workers to log maintenance requests or book meeting rooms online at their convenience instead of visiting a manned helpdesk, engineers and support staff are able to receive, update and complete tasks on the move using mobile devices.

The traditional helpdesk model often attracts criticism for being a reactive, non-agile ticketing system through which jobs take too long to complete, service levels are not aligned with key performance indicators and staff are frustrated with the perceived lack of activity once a job has been requested.

A white paper published by Symantec[1] suggests that the traditional helpdesk struggles to keep abreast of the service demands typically found in today's businesses and that the impact of slow service delivery can profoundly affect not just customer perceptions but can also extend across the whole business. This is often the case when service operations score low on customer satisfaction, which diminishes the IT department's reputation and value to the business.

This research highlights the value of investing in self-service implementation to achieve a more streamlined method of managing facilities, maintenance and booking requests.

Benefits of self service for FM

Self service offers many benefits for facilities departments and service provider organizations, delivering substantial efficiencies both at an operational and a strategic level. These include:

- **24/7 environment.** Self service is available to staff and customers on a 24 hour a day, seven day a week basis, ensuring that requests are logged as soon as possible and therefore improving rectification times and increasing customer satisfaction.
- **Reduction in job logging time.** Because jobs are logged via the Web, systems are able to prepopulate jobs with pertinent data such as staff information, location and fault type, therefore reducing the amount of time it takes to resolve and document the job.
- **Increase in staff productivity.** Staff are able to log jobs or book meeting rooms more quickly, allowing them to focus on completing their day-to-day tasks.

- **Elimination of duplicate tasks/bookings.** Users can easily view previously logged requests within a building or particular area of work, ensuring that fewer jobs are duplicated. Enabling staff to view available meeting rooms or desks also reduces double bookings.
- **Improved communication between client and helpdesk.** Self service delivers contractors, staff and customers with instant access to real-time job information, irrespective of location, which significantly improves the communication between all parties.
- **Improved contractor performance.** Instant access to information allows engineers to start and complete assigned jobs more rapidly. In addition, if while completing a job in a particular location an engineer discovers a new fault, the technician has the ability to log the job (including any supporting photographs) instantly.
- **Helpdesk efficiency.** Self service eliminates the need for helpdesk staff to answer high volumes of telephone or email enquiries. This allows them to become far more proactive, managing existing jobs and prioritizing resources rather than logging requests. Automatic job assignment to the most appropriate contractor further improves efficiency.
- **Reduced operational costs.** With improved helpdesk productivity, the requirement for extra resources is reduced, delivering expenditure savings in terms of salaries, occupancy and infrastructure costs.
- **Administrative savings.** Since the majority of jobs are logged online, the workflow process becomes more streamlined, allowing engineers and helpdesk staff to spend less time managing paperwork and other administrative tasks.
- **Space efficiency improvements.** With flexible or remote staff gaining greater access to available desk space or hot-desk opportunities through self service, they have more control over space allocation and feel secure that a workspace can be reserved when visiting the office. This enables staff members to become more productive and motivated.

Who benefits from self service?

Every individual related to a maintenance or booking request can benefit from self service, including:

- **Building users.** This accounts for any staff member or end user who might need to log a request; whether it is a teacher or nurse logging a request to have an important piece of machinery repaired or an office-based staff member with a catering request for a meeting room.

Through self service, users can rapidly log requests via an intuitive interface which removes the potential for errors and ensures that their request is assigned an appropriate rectification time. They can track the status of a job or booking from start to completion and can log any notes to help facilitate job completion.

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- **Remote/mobile engineers.** Utilizing self service on the move can significantly enhance the work of engineers carrying out maintenance or service requests, whether they are in-house staff, remote engineers or contractors. They can receive, update and complete jobs remotely via tablets or smartphone devices, thereby improving job rectification times, enhancing service levels, reducing administrative and operational costs, and achieving greater job satisfaction.
- **Helpdesk staff.** Self-service functionality enables users to log, view and update jobs themselves; therefore traffic coming into the helpdesk is significantly reduced. This allows the helpdesk to be proactive rather than reactive and allows staff to concentrate on ensuring that work is being completed on time instead of spending time manually logging jobs.
- **Support staff.** Support staff (those responsible for setting up equipment and providing catering) are informed of any specific requirements for the day and can plan their workload accordingly. This improves the level of service provided to meeting attendees, enabling them to focus on the meeting itself rather than wondering where the projector is or why the room is too hot or cold.
- **Senior management.** Self service, as part of an FM software solution, gives senior management access to an array of reports and dashboards that offer visibility of the performance of assets, buildings, bookings and resources. This delivers insight into budgets, contractor spending and KPI performance to help justify future spending and enable informed strategic decision making.

Marketing self service to optimize uptake

Since many users are reluctant to accept changes from their normal routine and can potentially revert back to established working practices, post implementation can often be the most difficult and crucial time. It is imperative that staff buy into the self-service offering and the benefits it entails. Collaboration between facilities, marketing and operations teams is vital: by leveraging internal communication channels, businesses are able to educate staff on the benefits of using self service and ensure user acceptance in order to fully realize the benefits to the organization.

When promoting self-service to staff and customers, due consideration must be taken to address the different profiles of those who will be using the system. For example, while an office-based employee may frequently access a corporate intranet, a field-based engineer may be less inclined to do so. Leveraging a broad range of communication channels to promote the self-service solution, such as those already listed, will ensure wider user acceptance.

Means of marketing the self-service offering may include:

- **Golden self-service login.** Supporting the centralization of helpdesk operations, this provides users with an easy-to-remember login. It can be communicated throughout the business as the login for all bookings or maintenance enquiries and could be used as a hashtag for social media (see below).
- **Social hashtagging.** For the more technically savvy users, offering a unique hashtag on Twitter or any other relevant digital communication channels (such as #SelfService) drives employee engagement between staff and the helpdesk, offering a quick way for staff to communicate any booking requirements or service issues with the system.
- **Company intranet.** Since an intranet is usually where all pertinent company information is stored and advertised, with all staff generally having access, it provides an ideal channel for communicating self service across the entire organization. The key benefits of self service should be included to promote user acceptance.
- **Internal communications.** As with an intranet, communicating the service through company-wide newsletters or magazines can improve the understanding of the solution and its benefits, reaching all necessary staff members.
- **Branding.** It is important to ensure that the self-service tool is branded in accordance to the company's brand guidelines. This will enable staff to relate to self-service as being part of the business and feel comfortable using it to log any maintenance or booking requests.
- **Satisfaction surveys.** A useful tool in measuring and understanding the level of employee and client satisfaction with the self-service solution. Surveys help to secure opinions from employees on how the solution works and its impact on staff. Feedback gained from such surveys may be used to drive potential future software enhancements.

By comparison, when communicating the benefits of self service to remote or mobile engineers who may not be as receptive as the general workforce, it is important to ensure that they feel comfortable with the operational change. Means of marketing self service to engineers may include:

- **Training guides.** Guides provide users with an in-depth summary of all the features of self service, particularly useful for those using it to its fullest capacity.

- **Email campaigns.** By providing engineers or staff with relevant updates before and after the launch of the self-service solution, emails ensure that self service has been sufficiently communicated and that staff have all the necessary information required to maximise its usage.
- **Workshops.** Workshops offer staff the opportunity to gain first-hand practical experience of the benefits that self service provides, ensuring that staff become more confident in using the various system features.
- **Online demonstrations.** Offering high-level demonstrations of self service through online video tuition enables staff to understand in greater detail how to unlock the various functions of the software. The ability to view the demonstrations as many times as is required helps staff maintain and develop their knowledge and improve their skillset.
- **Q&A.** This could be a face-to-face session during which experts aim to provide guidance and answers to any questions that staff may have, or as a dedicated section on the company intranet whereby engineers or staff can submit questions and receive responses online.
- **Champion users.** Assign a member of the team to become an expert in how the self-service solution operates. The champion user can help train new or existing engineers and assist them with ongoing support.

Self service offers a broad range of organizations a comprehensive and highly scalable solution to manage and maintain facilities, bookings and assets. By leveraging the latest Web and mobile technology, the software empowers end users and simplifies and streamlines the relationship between staff and the helpdesk, allowing for improved levels of job optimization and efficiency. It delivers complete transparency of performance to improve contractor relationships whilst driving KPI targets. Staff productivity is optimized, enabling a more proactive helpdesk, to deliver long-term administrative and operational cost savings, improve efficiency and drive business performance. **FMJ**

REFERENCES

1. Symantec (2009), The Modern Service Desk. http://eval.symantec.com/mktginfo/enterprise/white_papers/b-the_modern_service_desk_WP_20042136.en-is.pdf

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