



A NEW AGE FOR FACILITIES  
CUSTOMER SERVICE  
Making the Case for  
Engage Request



# Introduction

In the landscape of Facilities Management there are two converging truths which must be reconciled to continue to achieve success.

First, Facilities departments are responsible for more than ever before. They flat-out offer more on-demand services and support more square footage than what has ever been expected. As helpful as technology and capital planning are in reducing demands, corrective maintenance is a fact of day-to-day operations. Whether it's a door that won't unlock, heat or A/C that's not working, a plumbing leak, or a broken elevator the facilities team must be Engage for the unexpected and respond both quickly and efficiently.

Second, people now have the world at their fingertips with the pervasiveness of smartphones. Your employees, students, staff and faculty expect to be able to do almost anything from their mobile devices. This includes requesting services, reporting issues and receiving updates on the progress of their request.

Knowing that, it's not surprising that how we plan, schedule, and execute on these requests has been an ever-improving facet of facility management throughout the years. What is surprising, is that the process for *requesting* them hasn't kept pace over the same period of time.

## The Good 'Ol Paper Form

Before the world went digital, paper forms were standard. Your customers would call or stop by the facilities office where a form would be filled out describing the problem. There were many things that could go wrong with the paper process.

- Hand-written forms would be illegible or incomplete
- Rekeying data meant extra work and introduced errors
- A lack of detail meant extra trips to properly diagnose the issue
- Routing paperwork for approval introduced delays and debates
- Tracking status and history was labor intensive
- Manual processes relied on staff knowledge with inconsistent results
- Problems often went unreported because people didn't know the process



## The Online Form

The next generation of facility service requests came with the introduction of the online form. Although there are a variety of ways to create and host an online request form, they typically require some technical expertise and ongoing maintenance. The online form takes care of a number of the issues that come up regularly with a paper process, but many still exist.

- Data still usually needs to be rekeyed, meaning extra work and potential errors
- Many aren't dynamic enough to capture the details surrounding specific situations
- Delays are still created by going back to the customer for more information
- They still don't keep the requester informed of status and history
- It can be costly to develop online forms, especially the smarter you want them to be
- They still depend on manual processing and individual knowledge of complex processes

## The Online App(lication)

Finally, we have a solution Engage to help us tackle today's unique challenges. An integrated, digital solution is the most sophisticated way to handle your facility service requests offering a user-friendly interface for the requester that's tied directly into your facility maintenance system. Form logic and workflow streamlines the process while eliminating the need for duplicate data entry. Engage Request is an example of this kind of fully integrated solution for organizations using the FacilityForce Integrated Workplace Management System (IWMS) called Operate. A few of the benefits include:



- Create any number of online forms that are tailored for specific types of service requests
- Ask sophisticated 'dependent questions' capturing exactly the information you need
- Integration eliminates redundant data entry and creates work orders specific to the task at hand
- Requesters can snap pictures to attach to the request
- Form logic and workflow processes provide consistency even when staff turnover is experienced
- Interactive nature of online system improves communication providing status updates to requester for an unparalleled level of customer service

As you can see, the facility service request process has been undergoing significant changes and the benefits of a fully integrated, online solution are numerous. Read on to learn more about these benefits including first-hand accounts of how Engage Request has helped multiple organizations at Engage.

### **Benefits of a Facilities Self-Service Application**

Whether you're coming from zero automation, or have a simple facilities request form in place, the benefits of an integrated facilities self-service application are numerous. First, and most notably, Engage Request provides your customers with a self-service way to submit and track the progress of work requests from any device with a browser. Configurable form logic means the customer is presented with a line of questioning specific to their request, ensuring complete and accurate data capture. Having this convenient, easy-to-use system means that fewer problems go unreported, and the fact that requesters can easily attach photos means improved communication (a picture is worth a thousand words –right?, leading to faster resolutions and improved customer service overall.



Next, a fully integrated solution like Engage Request eliminates paperwork and redundant data entry, meaning more accurate information flow between the facilities department and its customers. For Engage Request, full integration specifically means the product bi-directionally communicates with our Operate enterprise IWMS, and Operate in turn communicates with the Perform field service apps. So, Engage Request opens a channel wherein customers can communicate with the facilities team and field technicians via a comment stream and notes log. The ability for customers to track work requests through to completion, receive status updates provided by facilities, and provide post-work feedback leads to a more satisfying experience for everyone involved. In all, this solution improves communication, eliminates bottlenecks and results in better customer service.

Finally, having a robust work request system like Engage Request results in process standardization that provides consistent, predictable results and helps build organizational resiliency. Having processes designed into the system ensures billing and authorization practices are consistently followed even as people move around the organization. The piece of mind offered to your employees knowing that work has been both funded and authorized before they receive the request frees them up to focus solely on execution. Eliminate those separate, siloed, manual systems and reduce your total cost of ownership (TCO). Engage Request improves your customer service, makes your organization more efficient and helps your bottom line.



## Who Benefits Most from Engage Request?

Internal to your organization your work control and front-line employees benefit greatly from the consistent, streamlined processes. They benefit from the funded, authorized, and detailed requests which are received complete with pictures and descriptions. Truthfully, the big winner in this endeavor is your customer. For the first time they have a simple, easy-to-use, way to request your services. When they need help they know how to reach you from any device with a browser. The status updates and progress reports give them comfort that while dealing with many requests simultaneously theirs is important and is going to be taken care of. They see you more than ever as an engaged partner in their success.

## What's Your Situation?

### Rolling out Engage to Replace Paper/Manual Process

Going from a paper or manual service request process to Engage is quite the jump technologically, but don't let that intimidate you. If implementing Engage Request from this stage, you should see a significant and immediate increase in back-office efficiency and customer satisfaction.

Think of all those manual process where so many things can, and often do, go wrong. Forms get lost in the process of submission and tracking, fields get filled in illegibly or with missing information, customers might not even understand what information they need to provide for technicians to do the work. Additionally, assigning the work can take extra time and tracking status and request history can be very tedious and involved.

Our team of trained implementation specialists will teach you how easy is it to create powerful, responsive forms which can be rolled out quickly to your customers. Worried about the complexity of the system and how to train your customers? Don't be. According to John MacLean from Portland Community College, the opposite is actually the case. After scheduling multiple Engage Request training sessions on Google Hangouts, they quickly realized that very few people actually signed up and



attended the training. Obviously concerned, they opened up the system only to find that 248 people were already in the system submitting requests. “It didn’t need training,” MacLean said, “That was the piece we took away, that it’s so intuitive it doesn’t actually need training.”

Partially through the rollout MacLean’s team realized that customers were often inputting maintenance requests as project requests by mistake. This issue was easily resolved, and he attributes that to the system being extremely flexible. “A lot of the changes you’re going to want to make as you go along ... you can do it yourself,” MacLean said, “Even I can do it and I’m not a technical person.”

Ask yourself, how much is your manual process costing you?

ROI Model for Engage Request vs. Paper/Manual Process		Amount
Variables:	Number of Facilities Service Requests Annually	25,000
	Administrative Labor Rate	\$25/Hr
	Technician Labor Rate	\$40/Hr
Before:	Average Time to Process Service Request (Paper Based)	10 Min
	Administrative Cost Per Service Request (Paper-Based)	\$4.17
	Annual Administrative Cost for Service Requests (Paper-Based)	\$104,250
After:	Average Time to Process Service Request (Online)	2 Min
	Administrative Cost Per Service Request (Online)	\$.83
	Annual Administrative Cost for Service Requests (Online)	\$20,750
Savings:	Labor Savings Per Work Request (Est 12 Min Per or 1 Hour Every 5th)	\$8.00
	Annual Labor Savings by Technicians	\$200,000
<b>(Before-After+Savings) Annual Cost Savings:</b>		<b>\$283,500</b>

### Engage Instead of Internally Developed Form/Portal

If your organization alEngage uses an online form or portal, the transition won’t be such a drastic change for either your employees or your customers. The process of filling out an online form is fairly similar, whether it happens within a homegrown solution or another external, hosted portal. The main difference your organization will see is the increased efficiency and saved time in the back-office. The smart form and integration saves your employees’ time in data entry, form review, and communicating with requesters for clarification. Integration with the Operate system also increases overall accuracy by reducing the information’s touchpoints with the system and therefore reducing the amount of risk for human error.

Instead of focusing on the parity between the two solutions, think instead of the gains you will achieve. A drag-and-drop workflow interface allows you to quickly

respond to organizational changes without waiting on programming assistance. Users being able to add images to their request which transfer to Operate and eventually show up on the serviceperson's mobile device. Bi-directional communication building a bridge between your customer, your work control center, and those front-line employees is an incredible value-add to your customer.

How does Engage Request compare to your internally designed application?

ROI Model for Engage Request vs. Custom Form		Amount
Variables:	Number of Facilities Service Requests Annually	25,000
	Administrative Labor Rate	\$25/Hr
	Programmer/Web Developer Labor Rate	\$75/Hr
Before:	Average Time to Process Service Request (Re-Key Form Data)	10 Min
	Administrative Cost Per Service Request (Re-Key Form Data)	\$4.17
	Annual Administrative Cost for Service Requests (Re-Key Form Data)	\$104,250
After:	Average Time to Process Service Request (Online)	2 Min
	Administrative Cost Per Service Request (Online)	\$.83
	Annual Administrative Cost for Service Requests (Online)	\$20,750
Savings:	Labor Savings for Custom Form Development (Est 4 Weeks)	\$12,000
	Labor Savings for Ongoing Maintenance of Custom Form (Est 2 Weeks)	\$6,000
	<b>(Before-After+Savings) Annual Cost Savings:</b>	<b>\$101,500</b>

### Building Coordinator Use of Engage Request for Inspections

Many organizations take a proactive approach with individuals tasked to look for problems and potential safety issues in their facilities. These individuals, sometimes called building coordinators, have traditionally taken notes while walking the building only to sit down later and key these issues into the Operate system as work orders. Some would even take pictures along the way, but would then have to upload and match the pics to corresponding issue notes later when back at their desks. This manual process was not only cumbersome and time consuming, but left room for errors as well.

Engage Request enables these coordinators to enter work requests directly into the system while walking the floor and in real-time as they identify issues. Using a mobile device, coordinators can initiate a work request, snap one or more picture(s), and enter a few notes. This can all be done in a matter of a seconds rather than the arduous process of rekeying them later. Since Engage Request requires the necessary information for various types of issues, you've eliminated the risk of missing something that might prompt a return to the site and the service techs have all of the information they need to be successful.



The following table illustrates an example of the potential cost savings from using Engage Request in the field rather than manually taking notes.

ROI Model for Building Coordinator Use of Engage Request for Inspections		Amount
Variables:	Number of Coordinator Initiated Work Requests Annually	4,000
	Coordinator Labor Rate	\$20/Hr
Before:	Average Time to Create Work Request (Paper Based)	15 Min
	Coordinator Cost Per Work Request (Paper-Based)	\$5.00
	Annual Coordinator Cost for Work Requests (Paper-Based)	\$20,000
After:	Average Time to Create Work Request (Using Engage)	2 Min
	Coordinator Cost Per Work Request (Using Engage)	\$.67
	Annual Coordinator Cost for Work Requests (Using Engage)	\$2,667
<b>(Before-After) Annual Cost Savings:</b>		<b>\$17,333</b>

### Enable Visitors to Report

#### Maintenance/Safety Issues (See Something, Say Something)

Engage Request not only enables your traditional customers to submit service requests, it also allows anyone coming in contact with your facilities to submit a request. With Engage Request on your side, parents of students and others visiting your campus can easily report maintenance concerns and safety issues they come across. Visiting employees to your distribution centers can let you know about issues with your restrooms or breakrooms. Our ability to support multiple types of authentication focus Engage users to the request flavors that make the most sense for them. Increase the safety of your facilities by being able to fix issues when they are noticed, no matter who sees them first.

Unlike the situations described earlier, it may be harder to place a value on being more proactive with maintenance/safety issues and risk mitigation in general, but that doesn't mean there isn't value. In fact, substantial value can come from mitigating risk factors within your facilities.

### Ensure Work Requests are Authorized and Funded Before Work Begins

"Who approved that request? I'm not paying for that." Two sentences a maintenance supervisor never wants to hear after the work is complete. Unfortunately, it's a too-often occurrence costing maintenance organizations thousands of dollars a year. The complexities surrounding chargeable vs. non-chargeable work within your organization can lead to confusion and frustration if not handled accurately and consistently. Engage request's form logic can prompt users for financial information based upon multiple factors including the type of work, the location served, and the requestor themselves. Requests can then be easily routed for approval using



Engage Request's powerful workflow engine ensuring that each request is both properly funded and fully approved before work begins.

What's it worth to avoid this situation? Again, it's hard to assign a value, but easy to agree we'd all rather avoid these headaches.

## Conclusion

As a government sector entity, your facilities aren't simply buildings that get used. Your facilities are the heart of your community, where people pursue learn, live and chase dreams. You're proud of your facilities, and take pride in the collaborative environments they provide.

Inevitably however, things will unexpectedly break and require corrective maintenance. When issues do arise, don't let them define you; instead take control by providing an easy-to-use, mobile-friendly system for anyone to submit and track facility service requests. Doing so will standardize and streamline your process, making your department more efficient and effective in delivering remarkable customer service.

If you already have the Operate IWMS, adding Engage Request for online, self-service requests is simple. If you don't have Operate, visit us at [www.facilityforce.com/iwms](http://www.facilityforce.com/iwms) to learn more about how FacilityForce's complete, end-to-end IWMS called Engage-Operate-Perform can help you build an even stronger community.



## Why FacilityForce?

A leader in Integrated Workplace Management Software, FacilityForce provides a single, unified platform for all of your facility management needs.

Dedicated to continued innovation, we're constantly listening to your feedback and ideas for improving our current products. As part of this process, we consistently add state of the art solutions to our product line.

At FacilityForce, we're more than just an IWMS solution, we're a family dedicated to the successful management of your community.



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