Estates and Facilities
Management Division

University of Leicester

Advice Report

Service Desk

Building a better service!

Author:
Pandora Bol
January 2011

Advice Report

Service Desk

Building a better service

Third year Internship Facility Management

University of Leicester

Pandora Bol
January 2011

Hogeschool Rotterdam
G.J. de Jonghweg 4-6
3015 GG Rotterdam
The Netherlands

Degree	Facility Management
Teacher	Tanja Zuijderwijk
Company	The University of Leicester University Road Leicester LE1 7RH United Kingdom
Supervisors	Karen Bignold & Tim Yates
Research Period	September 2010 - January 2011
Version	1.1
Document	Final version

Executive Summary

Currently customers of the Estates and Facilities Management Division (EFMD) do not know where to go with their requests because there is no central point of contact for the EFMD. This has different consequences. Customers have to call several numbers to contact the right person and staffs are interrupted for no reason. Besides that, there is no system where request can be saved so managers have no idea what is happening within their department. The solution is a one stop shopping EFMD Service Desk.

Regarding to the problem analyses above the following Project Definition below is formulated.

How can the Estates and Facilities Management Division plan for a Service Desk to work transparently, efficiently and effectively?

The aim of the project was:

Within 20 weeks, prepare for the arrival of a Service Desk at the University of Leicester Estates and Facilities Management Division by describing the procedures and processes needed for the Service Desk to work transparently, efficiently and effectively.

To answer the Project Definition above there is done Desk Research and Field Research.

The most important conclusions from this project were:
The EFMD defined the Service Desk as an one-stop shop that meets the needs of the customers and provides effective management of tasks within the Division and reliable management information, leading to efficiencies, improved service quality and reduction in service delivery costs. The Service Desk will be open during office hours, will have 2,8 fte and can be contacted in different ways. The maximum budget for the Service Desk system is £100,000.There are different options for a Service Desk System but at this stage of the project the EFMD does not know yet which one they want to choose. If the EFMD wanted to go for an off the shelf Computer Aided Facility Management (CAFM) system research showed the following companies meet the EFMD's requirements most and will be asked to tender: *Planon*, *Integrated FM (Causeway)*, *Concept (FSI)*, *Archibus (MASS PLC)*, *Planet FM (Qube)* and *QFM (SWG).*

Following on the conclusion, the next recommendations were given:

- Keep it simple to start with & develop with time.
- Define which procedures and approvals are needed for this project and adapt this in the time planning to make sure the Service Desk is implemented within the time given.
- Define which role IT services is going to play in the project, agree this with IT and write it down in an agreement.
- Strong management support is needed during and after the project.
- Better communication between different apartments. When the Service Desk is implemented the Service Desk has to keep in touch with the Back Office. This ensures the Service Desk stays up to date and the expectations of both sides stay at the same level.
- Involve users within the project, this makes the service user friendly and the user is more willing to use it.
- Do not focus too much on the software, also look at the processes of the Service Desk.
- Solve staff problems before they are going to work with new procedures.
- When the Service Desk is implemented, first everyone has to be told what the procedures are and then everybody has to start working in an uniform way.

Acknowledgement

This is the advice report for my third year internship at the University of Leicester for the degree Facility Management at the Rotterdam University, University of Applied Science in Rotterdam.

When I started my degree I said to myself, I wanted to do my third year internship abroad. It was a long period of searching an internship abroad and I almost thought it was not going to happen. Therefore, I was so happy when Tim Yates gave me the opportunity to complete my third year Internship at the University of Leicester. Now here I am presenting my advice report for my Third year internship at the University of Leicester in England.

I would like to thank the following people:

Firstly, I would like to thank Karen Bignold and Tim Yates for their support throughout this period with their patience and knowledge. They reviewed the drafts of this report carefully and provided many important suggestions for improvement; I greatly appreciate their excellent supervision their time and effort. I also would like to thank the interviewees for being able to make some time for me and inform me about the aspects of their job relating to my assignment. Special thanks to the Universities I visited for taking time to welcome me, the information and the tour of their Universities.

I also would like to thank Tanja Zuijderwijk for her supervision, support and the great tips she has given me. For their tips, comments, critical view and time to look through my report I would like to thank Anne Ensing and Arno van Doggenaar.

Lastly, I would like to thank my family and friends for their support, encouragements and the motivation they have given me during this internship.

For now, I would like to say, enjoy reading this report.

Leicester, January 2010
Pandora Bol

Contents

Introduction **6**

1. Organisation Analyses **7**
1.1 The University of Leicester 7
1.2 Structure Estates and Facilities Management Division 7
1.3 Analysis EFMD 8

2. Research Method **9**
2.1 Background 9
2.2 Parties 9
2.3 Research Methodology 9

3. Current Situation **11**
3.1 Current situation 11
3.2 Systems 12
3.3 Customer care 12
3.4 Consequences no change 13

4. Service Desk in theory **14**
4.1 What is a Service Desk? 14
4.2 Implementation 16
4.3 CAFM 16

5. Other Universities **17**
5.1 Interview results 17

6. Ideal Situation Service Desk **19**
6.1 Scope and objectives 19
6.2 Software 19
6.3 Organisation 20

7. Software suppliers **22**
7.1 Buying a CAFM system 22
7.2 Conclusion 23

8. Conclusion and Recommendations **24**
8.1 Conclusion 24
8.2 Recommendations 25

9. Implementation **26**
9.1 Implementation process 26
9.2 Managing the Change 27

References and Bibliography **28**

Appendices **2**
Appendix 1. Estates and Facilities Management Division Organisation Chart 3
Appendix 2. Topic list interview Customers 4
Appendix 3. Reports Interviews Customers 5
Appendix 4. Graphic view of the Service Desk models 11
Appendix 5. Implementation Model 12
Appendix 6. Topic List External Interviews 13
Appendix 7. Reports External Interviews 14
Appendix 8. Overview external gathered information 33
Appendix 9. Process of a Request 35
Appendix 10. Overview of ideal situation 36
Appendix 11. Overview of Costs systems 37
Appendix 12. Sheet Grading Pointing System 38
Appendix 13. Implementation Planning 40

Attachments **41**

Introduction

This report is written with reference to my third year internship assignment for the degree Facility Management at the University of Applied science in Rotterdam. The assignment is completed at the University of Leicester Estates and Facilities Management Division (EFMD). By reading this report it become clear what the current situation of the EFMD is regarding a Service Desk and what the EFMD need to do to implement a Service Desk.

Background

Currently customers of the EFMD do not know where to go with their requests because there is no central point of contact for the EFMD. This has different consequences. Customers have to call several numbers to contact the right person and staff are interrupted for no reason. Besides that, there is no system where a request can be saved so managers have no idea what is happening within their department. The solution is a 'one stop shop' EFMD Service Desk. To implement a Service Desk, several steps need to be followed, which are described in this report. There will be several changes for the EFMD and for the customers when a Service Desk is implemented.

Project Definition

For this research, the following project definition was formulated:

> How can the Estates and Facilities Management Division plan for a Service Desk to work transparently, efficiently and effectively?

Research method

To answer the project definition, there has been done Field- and Desk research. For Field research different Universities were visited, meetings have been held, phone calls have been made and emails have been sent. For Desk Research, the following sources were used: internet, books, magazines, thesis and articles.

How to read the report

In Chapter 1 an organisation analyses is given. In Chapter 2, the research justification is covered. Chapter 3 will make clear what the current situation is. Followed by Chapter 4 which describes some theory of the subject: Service Desk. Chapter 5 shows how other Universities manage their Service Desks. In Chapter 6 the ideal situation is mentioned. Chapter 7 shows an overview of different Computer Aided Facility Management (CAFM) software suppliers and the requirements for a CAFM system. In Chapter 8 the conclusion will be given followed by the advice and recommendations. In Chapter 9 an advice for the implementation will be given.

Attached documents to this report that have been accomplished during this internship are:

Project Brief: This document shows why this project was started and what the ideal situation is.

Overview of Software Suppliers: This document shows an overview of different CAFM software suppliers and gives advice on which software suppliers should be chosen to tender.

These reports are not part of this report because the documents are too specific and it is directed to the EFMD.

1. Organisation Analyses

To understand the content of this report this Chapter gives a brief overview of the University of Leicester and the Estates and Facilities Division (EFMD) of the University of Leicester. The information in this Chapter was collected from the website of the University of Leicester and by interviews.

1.1 The University of Leicester

The University of Leicester is a leading UK university committed to international excellence through the creation of world changing research and high quality, inspirational teaching. The Times Higher Education applauded Leicester's approach, describing The University as "elite without being elitist." It is an University of 23,000 students and the turnover is in excess £230m per annum**.** The University directly employs over 3,500 people and indirectly supports the employment of just under 3,000 others. The total Land Holdings of the University is 68 and there are 305 buildings.

1.2 Structure Estates and Facilities Management Division

The EFMD is one of the University's key support services and provides a wide range of estates development and facilities management activities for the University. The Division is headed by the Director of Estates and is divided into a number of functional areas that are detailed below:

- **Facility Services** which provides outward facing support services ranging from cleaning to security
- **Property Services** which looks after the buildings and their interiors.
- **Customer Care and Office Support** which deals with the internal computer, personnel and finance support for the Division and also manages the insurance and customer care operations.

Each functional area has a senior manager who reports directly to the Director of Estates. In total the EFMD employs 383 staff, many are part-time. The biggest department is the cleaning department with 151 staff.

The mission of the estates department is:
''To be highly effective in managing the Estate in order that the University can deliver its Strategic Vision by ensuring that the Estates staff provide a customer focused, quality service and remain the credible service provider of choice.''

The vision is:
''To deliver value for money, quality driven Estates services through innovation and the employment of effective well-developed staff. Ensuring that the University's staff and students are inspired by their surroundings and the built environment.''

The organization chart of the EFMD can be found in Appendix 1. The organisation is a line organisation; it is also called a hierarchical organisation. Everyone has a supervisor or manager to whom one is related in a power structure. This structure shows people's position in the business and the layers of responsibility that are associated with that level.

1.3 Analysis EFMD

Strategic position

The EFMD's strategy has been developed in the way in the diagram below. The EFMD has to work together with the other departments to make its strategy. The EFMD also have to take in account that their plans support the academic plan. The final strategy of the EFMD informs the service level agreements and the key performance indicators for each department in the EFMD.

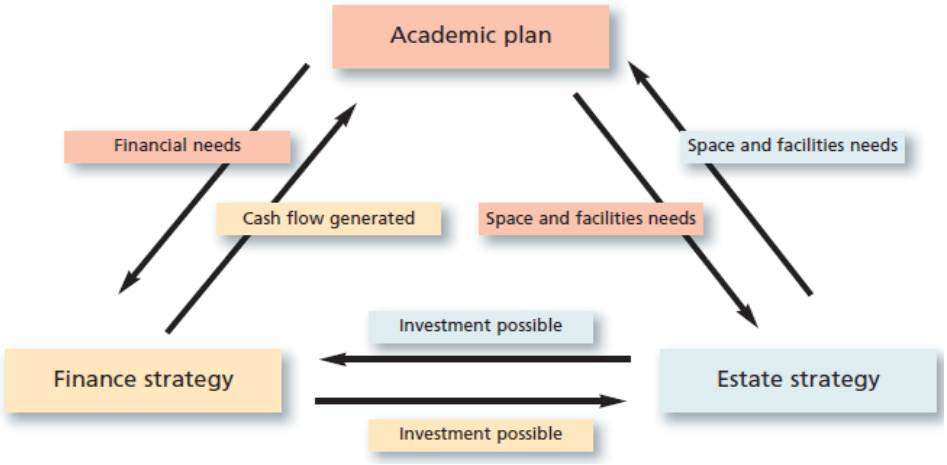


Image 1.2 The Planning triangle

Customers

Customers are important for the EFMD because they use the services they provide. Below the different customers are defined.

1. *Building contacts:* Building contacts make the most requests of all the customers. People in the building go to these building contacts to report requests.
2. *Staff:* this is all other staff that are working at the University.
3. *Students:* The students are big users of the buildings but the EFMD does not have a lot of contact with them. The students report faults and issues to University of Leicester staff.
4. *General Management:* They can adopt different roles depending on the issue in question. As a customer, they demand facility services, yet as a principal, they also set available budgets and therefore codetermine the quality level of facility services. Consequently they judge the functioning of the facility department as well as the level of service quality
5. *External Customers:* These are contractors, shops, catering at campus and external leasers of the buildings.

Competitors

Because the University pays the EFMD, the EFMD has to keep improving their service. All the integrated facility management companies are competitors for the EFMD. Companies such as Sodexho or ISS who provide single services and integrated facility management. Small local companies who provide single services are also competitors.

2. Research Method

To achieve good advice good research is needed. In this Chapter the justification of the research can be found. The background, parties and methods of research are described.

2.1 Background

It is important to have a clear vision of what the reasons are for doing this research. The main reason for implementing an EFMD Service Desk is improving the customer service. In the current situation, each department operates separately with separate points of contact and it is not always clear to the customer which section or person they should contact. At present, the customer rings several numbers before they are connected with the right person. Besides contacting the EFMD is not working properly there are also other complaints about the service provided. Customers say they are waiting for the request to be done and do not know what is happing with their request, some jobs are not done at all. Another problem in the EFMD is managers do not have any management information, they do not know what their staff are doing, what is happening within their departments and if the customers are satisfied. The proposal is to address these issues through the introduction of a “one stop shop” Service Desk system to provide an integrated, rapid response, customer focused service and management information. This Service Desk will be supported with a CAFM Helpdesk system.

2.2 Parties

There are several parties involved in this project. In this section, the direct parties involved are customers, the EFMD and IT Services. Customers are important for this project; they are the main reason why a central Service Desk for the EFMD is implemented. The different customers are: building contacts, university staff, students, general Management and external customers. Management of the EFMD will be able to make more effective, evidence based decisions, as they will have the correct management information. Staff of the EFMD will have to change their work processes. IT Services is responsible for the software side of this project. They will help and advise buying the system and depending on which system is chosen they will also help to maintain the system.

2.3 Research Methodology

As mentioned in the introduction Field- and Desk research have been done to answer the project definition and project aim. Desk Research is the analysis of information that already exists. Field research is research, by direct contact, with an identified (or targeted) group of potential clients. There is chosen for this method to give a complete view of information so enough and different information is gathered for this research.

Desk Research

For Desk research, the following sources were used: internet, books, magazines, thesis and articles. Internal information is gathered from customer surveys, intranet and existing documents. Because some of the Literature found was in Dutch, it has been translated in English to use for this report. An overview of the used sources can be found in the Chapter References and Bibliography.

Field research

For Field research different universities were visited, meetings have been held, phone calls were made and emails have been sent. Information is also gathered from talking with Facility

Management software suppliers. The reports of the interviews held can be found in Appendix 3 and 7.

In order to answer the project definition effectively, it is necessary to decompose it into the sub questions, which can be found in the table below which also shows the research method for every sub question.

		Desk Research	Interviews	Observation	Meetings	Benchmark
1	What do the EFMD want from a Service Desk?	X	X	X	X	X
2	What is a Service Desk and which aspects are part of the implementation of the Service Desk?	X				X
3	How do other universities manage the Service Desk?		X			X
4	What are the costs for implementing the Service Desk at the EFMD?	X	X			
5	Which procedures have to be written down to get a good working Service Desk?	X	X	X		
6	What are the personal and organisational consequents when a Service Desk gets implemented?		X	X		
7	Which FM software suppliers are there and what are the advantages and disadvantages of those systems?	X				X
8	What are the basic software requirements for a Service Desk system?	X	X		X	X
9	How can a Service Desk be implemented in the estates and facilities management division?	X	X		X	
10	What is the Current situation regarding a EFMD Service Desk?		X	X	X	

Table 2.1 Overview of Sub questions and research methodology

3. Current Situation

In this Chapter the current situation of the EFMD is described. Information in this Chapter is gathered from the business case and by interviews and observing staff. It is important to describe the current situation before looking at the ideal situation in Chapter 6.

3.1 Current situation

In Section 2.2 the background of the project has been written down. This paragraph shows the way how requests are made in the current situation. Each department operates separately with separate points of contact and it is not always clear to the customer which Section or contact they should use. An example of an incident in the current situation is a leak. If there is a leak, people call the maintenance helpdesk. A maintenance clerk goes to the leak but it is not cleaned up yet, so he cannot do his job. Therefore, the customer first has to call somebody from Cleaning and Portering and then the maintenance job can be done. This way of dealing with incidents is not very customer friendly/focused.

Way of contact

All the departments within the EFMD have their own way of dealing with requests. Because every department is contacted separately, there is no central registration of the requests. Besides that, the departments do not register all the calls and emails they receive. There is no reliable information available how many requests the EFMD gets, what people do in their time and how often things are broken down. In table 3.1 an overview of how people can contact different departments is given. In case of emergencies, there is an emergency helpline. The helpline is directed to the security Control Room that operates 24 hours a day, 365 days a year. In the current situation if people do not know who to contact they sometimes call the security emergency helpline.

Facility Services	Phone	Email	Web form	Face to face	Desk
Portering and Cleaning Services	X		X	X	
Security	X	X	X		X
Horticulture	X	X		X	
Environmental	X	X	X	X	
Facility Support	X	X			
Property Services					
Interior Solutions	X	X			
Maintenance	X	X	X	X	X
Development	X				
Space Management	X			X	

Table 3.1. Way of contact departments EFMD.

Maintenance Helpdesk

The majority of ad hoc requests for Maintenance are reported at the Maintenance Helpdesk. Some people also call the Maintenance Helpdesk because they do not know where else to call. The maintenance helpdesk is covered with one employee. This employee is the only person who knows how everything works; with the consequence that when he is not able to work there is no professional behind the helpdesk. In case of absence, someone else from the EFMD will cover the helpdesk.

Process

Because each department has their own way of dealing with requests there is no formal process. At present, the only calls/requests being logged and reported on are the 9500 jobs logged per annum on the SAP Plant maintenance system.

3.2 Systems

In the current situation, there is no central CAFM system for the EFMD where requests can be reported. The system used for the Maintenance Helpdesk is an in house system developed in SAP (SAP Plant Maintenance System). The system is used to enter requests. The SAP system in the current design does not provide everything the EFMD need. Besides the SAP planned maintenance system the EFMD use many other systems. The main systems that the EFMD use are MICAD and SAP. MICAD records all of the University space and enables property professionals to manage their built environment. SAP is the main University system that is used by the whole university. It has all different kind of applications and support to businesses of all sizes globally. The university use SAP as their main financial and HR software system.

Because everything is entered in different systems this has the result of: No information available of other departments within the division, loss of general view and a lot of systems to maintain

3.3 Customer Care

The EFMD have a Customer Care Officer, the Customer Care Officer (CCO) acts as a liaison between the EFMD and the University Community. Members of staff and students should contact her with comments, issues, and suggestions for improvement regarding any of the EFMD services. The EFMD conducted a survey of its customers (targeting EFMD Departmental Contacts but open to all staff and students) and received a large number of comments indicating that services were difficult to contact and that responses were sporadic or slow. It also showed that customers use a number of ways to contact the services, see Image 3.1.

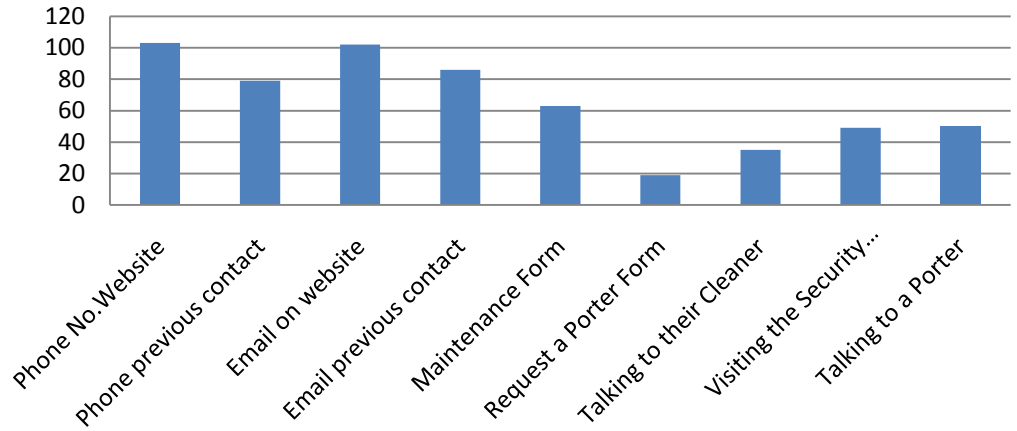


Image 3.1 Results EFMD survey how customers contact the EFMD.

Results Customer interviews

The topic list and reports of the interviews can be found in Appendix 2 and 3. The results of the interviews with different building contacts show customers are not happy with the current situation. They had complaints about not knowing what happens with their request, jobs are not done or not done correctly and they do not know whom to contact in the EFMD to report a request. Besides that, the maintenance helpdesk is not always accessible. The building contacts report request by filling in the online maintenance form, call the maintenance helpdesk or call people they know in Estates. They all mentioned the online maintenance form is not easy to fill in.

The interviewed building contacts were positive about the idea of an EFMD Service Desk. They were also positive about an online tracking system for their requests.

3.4 Consequences of no change

The consequences of no change can have a major impact on the EFMD. All the bottlenecks described in paragraph 2.2 will stay our will get worse. The list of consequences is set out briefly below.

Fact	**Consequence**
Customers will stay dissatisfied	EFMD is not the service provider of choice; The University will maybe outsource the Facility Services.
No control of processes	Jobs are not done correctly because nobody knows what the main process is and managers cannot check what staff are doing.
No control of finance	*Large amount of money spent on maintenance, this can end in not having enough money to maintain all the buildings.*

Estates Objectives

By implementing a Service Desk, the EFMD will meet the objectives and the mission described in Chapter 1: customer *focused quality service and remains the credible service provider of choice*. Advantages for the EFMD when a Service Desk is implemented are listed below.

Advantage	**Consequence**
EFMD is always accessible	Customers are more satisfied and problems can be solved before they get worse.
Better customer focus	Customers are more satisfied with the delivered services.
Better management information	Services can be improved and managers know what staff are doing.
Uniform way of working	Customers get the same service and EFMD staff know what is expected from them.

4. Service Desk in theory

In this Chapter theoretical aspects are written down that apply to this research. Information is gathered from experience, books and websites.

4.1 What is a Service Desk?

The definition of 'Service Desk' is in the book '*Servicedesk spin in het Facilitaire web'* by Rouw, L.de described as: ''A Service Desk is a central point of an internal service organization where all customer inquiries and requests are received, translated into concrete products and services, and possibly be put to other parts of the organization.''

How a 'Service Desk' is called can be quite diverse, see list below:

- Front Office
- Customer Service point
- Information Centre
- Facilities Service point
- Helpdesk
- Service Centre
- Facilities Helpdesk
- Customer Service
- Service Desk

Organization

To be customer friendly and demand driven a Service Desk is organised in a Front and Back Office concept. In the Dutch book, Facility Management from Maas and Pleunis, the Front and Back Office are described as: "The Front Office" is the part of the organisation that is responsible for the primary contact with customers. "The Back Office" provides the services and products based on the customer needs. The Front office acts as an account manager between the productions departments of the organisation and the customers.''

Also in the book Facility Management by Maas en Pleunis, they describe three different models to organise a Service Desk. In Appendix 4 there can be found a graphic overview.

1. Information Centrum model

This model is most limited in scope. The function of the front office mainly consists of answering questions and providing information. For complaints about supplied products and services, customers must contact the Back Office of the organization. They also have to contact the Back office to order products or services.

2. Account management Model

The account manager's model goes a step further and is essentially a mixed model. This model is based on the front office; customers can ask questions, complain about all aspects of the services and also request services to deliver. There can be said the Front Office is an account manager between the Back Office and the customer. The front office communicates with the customer about the requirements and wishes concerning the desired products and services.

3. Cluster model

The front office based on the cluster model is the most extended. All questions, complaints and requests for all the services to the customers of the facilities organization are expressed in the front office. There are several Service Desks where the customer can go to, to requests a service or product. These separate Service Desks are usually connected to a central front office, which is responsible to generate the desired management information

Tasks of a Service Desk

It can be said that a Service Desk is a management mechanism to deliver adequately, structured and monitored services. It depends on how a Service Desk is organised in an organisation but generally, the following tasks can be part of the Service Desk:

- Intake standard request and non standard requests
- Manage Products and Services Catalogue
- Monitor and secure the progress of the requests
- Relationship management with customers and Back Office
- Collection of Information
- Contact with contractors
- Close requests

Products and services of a Service Desk

It depends on the organisation which products and services they want to offer. All the services a Service Desk provides should be described in a products and services catalogue, so the customers know what the Facility Department offers and what they can expect of the service. For each product or service there has to be written down: the description, quality level, how to order, delivery conditions and costs of the product.

Process

A process is a collection of related, structured activities or tasks that produce a specific service or product for a particular customer or customers. It often can be visualized with a flowchart as a sequence of activities. The standard process a request at a Service Desk is shown on image 4.1.

Image 4.1 standard process of a Service Desk request

Explanation of the process

1. Adopt request for a service

The request is adopted on a central point in the organisation, the Service Desk. The Service Desk will record the request and send it to the right department in the Back Office. The way of recording a request is done in a uniform way, and is channelled into different products and services.

2. Initiating of the service request

This step is informing the departments in the Back Office of the activities to be undertaken. Important in this step is to change the unstructured request from the customer in standard structured services within the departments.

3. Accomplish job and monitor progress

This step involves the actual accomplishing of the request. The executive departments are responsible to accomplish the job, but the Service Desk monitors the request. This means the Service Desk will need to stay informed about the progress of the job, so it can inform the customer.

4. Complete job and after care

If the job is completed by the Back Office they have to let the Service Desk know, so the Service Desk can complete the job in the system and inform the customer. If the customer is not satisfied with the delivered service, they can let the Service Desk know. In that case, the Service Desk will contact the Back Office and they will provide the service again.

4.2 Implementation

In the book '*Servicedesk spin in het Facilitaire web'* by Rouw, L. de they speak about the next implementation steps for a Service Desk in an organisation. See Appendix 5 for the visual implementation model. Note: all the steps do not have to be done at the same time.

1. Formulate the objective and mission of the Service Desk
2. Inventory of products and services and services levels
3. Adapt services between Service Desk and Back Office
4. Computerization of the Service Desk
5. Coordination of the Service Desk
6. Organisation for the Service Desk
7. Building the information function
8. Building the physical Service Desk
9. Building the call centre function
10. Organise the account management
11. Employing the Service Desk
12. Use the Service Desk
13. Evaluation

4.3 CAFM

Computer Aided Facilities Management (CAFM) evolved in the late 1980's using computers to automate the collection and maintenance of Facilities Management information. It is also known as CMMS (computerised maintenance management software), FMS (facilities management software) TIFM (total integrated facilities management and CIFM (computer integrated facilities management).

Best practicecomputer.co.uk defines CAFM software as: ''Any application that assists management in the coordinating of the workplace with the people and work of the organisation. It includes management of the buildings and services and is sometimes used to mean property management.''

CAFM software is not a 'quick fix' to a poorly managed or fundamentally unsound management system. It is a tool to aid operational efficiency, generate quality improvement and assist in compliance. Therefore, companies must be aware that they will need to have their organisation's business processes well defined and operating successfully in advance of any installation of FM software.

Licences

The number of staff that are working with the system will have an effect on the cost of the system. There are different types of licences available, as listed below.

Concurrent User	Access can be given to any number of users but only as many users as licences purchased will be able to access the database at any one time.
Named User	Access will be given to named users and only those users may access it.
Registered Client	The system will only be able to be accessed by the PC's (registered clients) that are licensed.

5. Other Universities

The results of this Chapter are from Field Research at other Universities. This is done to investigate how comparable organizations organize their Service Desks. The used topic list for the interviews and the reports of the interviews can be found in Appendix 6 and 7.

5.1 Interview results

Five other universities were chosen to visit to compare and to see how the EFMD can organise their Service Desk. An overview of the gathered information can be found in Appendix 8.

Implementation

Because almost all the Service Desks were already implemented a while ago, there was not much information about the implementations. At the Erasmus University, it took 6 months to implement the Service Desk. The project members were not full time on the project, the first 3 months it was 3 hours a week and the last three months 15 hours a week. The Aston University of Birmingham implemented their new CAFM system within 6 months.

The universities in the Netherlands mentioned there changed a few things for their employees when the Service Desk was implemented. Some staff got jobs that were more challenging and others got a job that did not meet their needs. Another change was staff now do a job they are specialised in.

Organisation

All the universities had a different way of organising their Service Desk. They all used a different model (models mentioned in Section 4.1) to organise their Service Desk. Not all the Service Desks offered the full range of Facility Management services; some had only a few services. The Universities in the Netherlands also offered student support and reception tasks at their Service Desks.

All the Service Desks offered different ways to contact e.g. phone, email, web form and a physical desk. The physical Service Desks visited in the Netherlands were more developed than the one in the United Kingdom. They had satisfied customers and the processes of the Service Desk where known and written down. Only the University of Nottingham had a physical Service Desk in the UK.

The universities in the Netherlands wrote down 80% of their procedures for the requests. The universities in the UK wrote very few processes down, but want to do this in the future. The process of a request was the same at all the universities e.g. request reported, carry out request and close request. At the University of Nottingham Help Desk Staff only take calls for Emergency and Urgent jobs. For all other requests staff are asked to complete the on-line form, this ensures that the help line is never overloaded.

Software

In the table in Appendix 8 there can be seen that all the Service Desks are using a system to support their Service Desk. Three out of the five Universities are using Planon. Most of them have chosen Planon as their Service Desk system because they already had other modules of this supplier. The University of Nottingham use 'FSI Concept Evolution'. This system is easily configurable and the

system administrator did this all himself. The University of Delft is not using a CAFM system for their Service Desks. They use a reporting system to report the requests called 'Infra Enterprise'.

Management information

The Universities that were using Planon generated their reports in Excel. The University of Sheffield used Planon and the application Dashboard to generate management information from Planon. The Dashboard module provided a range of graphics and provides a snapshot of the system at any one time. At the University of Nottingham the system administrator writes the reports.

Staff

The universities visited in the Netherlands had more staff, because they had more than one service point. The universities visited in the UK had between one and three staff on the Service Desk and extra staff cover if needed.

Quality

To ensure the quality of the service is good all the universities had standard times by which a request has to be solved. The Erasmus University also mentioned their Service Desk employee have to pick up the phone within 15 seconds.

Customers

The University of Delft and the Erasmus University also let students use the service points. All the other universities the Service Desk were more orientated at Staff. To make sure the customers are satisfied the Universities use the following resources:

- Customer survey
- Mystery Shopper
- Product and Services catalogue

Besides that, they also mentioned it is very important to keep in touch with customers. This means ask what they expect from the service, which bottlenecks they encounter, explain the customers what they can expect from the Estates and Facilities Department and keep the customer up to date with their request.

6. Ideal Situation Service Desk

In this Chapter, the ideal situation of an EFMD Service Desk is described. An overview of the ideal situation can be found in Appendix 10.

6.1 Scope and objectives

Mission and Objectives

The mission describes the function of the Service Desk in the organisation. The mission for the Service Desk will be: ''The Service Desk is a one stop shop that meets the needs of the customers and provides effective management of tasks within the Division and reliable management information, leading to efficiencies, improved service quality and reduction in service delivery costs.''

The objectives for the Service Desk can be formulated based on the mission. These objectives show the preferred parameters for the Front Office and what the organisation hopes to achieve with its implementation. The objectives are:

- Integrated, rapid response, customer focused service.
- Integrated process-orientated approach for the EFMD.
- Providing comprehensive, timely and accurate management information.
- Effective service delivery – 'right first time'.
- Improved image for the EFMD.

The Service Desk

It was initially planned to call the front office a 'Help desk', but it is important the customers know it is a new service point and not only a helping point so it was decided to term the Front Office 'Service Desk'. The sections covered by the Service Desk are listed in table 6.1. An example of the process of the EFMD Service Desk for a request is shown in Appendix 9.

Facility Services	Property Services
Portering and cleaning services	Interior Solutions
Security*	Maintenance
Horticulture	Development**
Environmental	Space
Facility Support	

** Not all the security services will be provided by the Service Desk, Emergency calls will still go to the Security Control Room.*

***The Service Desk should have lists of current projects with project manager contact details, they should also have contractor details for major projects but these need not be on the system*

6.2 Software

There are three different options for the development of the Service Desk software:

- SAP: existing helpdesk system developed to provide the necessary requirements
- IT Help Desk system
- Off the shelf CAFM software system

In Chapter 7, an overview of the requirements for an off the shelf CAFM software and a review of CAFM software suppliers can be found.

6.3 Organisation

Physical Location

Ideally this should be in a central location; it is important the Service Desk is easy to access for the customers. Possible locations are: the Security Lodge, the Switchboard Room, the maintenance area in the Charles Wilson Building or the Maintenance Corridor in the Fielding Johnson Building (following refurbishment).

Means of contact

In the current situation it is not always clear to the customer where to go with their request. In the ideal situation, the customers can contact the Service Desk in 3 different ways. The virtual Service Desk (online+ email), call centre functionality (telephone call) and the physical Service Desk which can be visited in person.

The Virtual Services Desk will be an online products and services catalogue which shows what services the EFMD provide. Customers can request their services online without any contact with a person. The system puts the request directly in the CAFM system and the Service Desk staff only has to check if the request is complete. It is also possible to send a request by email. Call centre Functionality is used for services that cannot be requested at the virtual Service Desk or in case of an emergency request. First line support can be offered to trouble shoot simple problems or provide further advice.The physical desk can be used to collect products (possibly to collect keys, permits, ID cards etc) and report requests. In the ideal future this desk will also be a central point to log in contractors on site and provide information (Job description and health and safety rules) for contractors and customers.

Opening times

The Service Desk will be open from 8:00 - 17:30 i.e. during normal working hours. After office hours the emergency phone calls are directed to the Security Control Room. Non emergency calls after office hours can be reported on the online web form or by email.

Staff

In the current situation the maintenance helpdesk is covered by 1 person. Based on the numbers of requests described in Section 2.2 and the calculation below, 2.8 FTE would be suitable for the Service Desk to provide a good service across the day. This means 1.8 FTE extra is needed. This number is just an indication, when the Service Desk is implemented, it will be possible to measure the response times to calls and review the staffing levels.

The table below shows that 1 Service Desk employee is productive only 180 from the 247 working days. This means that 1 FTE covers 73% of the total opening times of the Service Desk so for complete cover 1.4 FTE would be required, i.e. a minimum of 2 employees.

Calculation critical limit of Staff of the Service Desk		
Full time working week	37.5	
Working days a year minus public holidays, weekends and University Closure	365 – 104 – 8 – 6	247 days
Working days minus Annual Leave	247-24	223 days
Working days minus Sickness	223 -5%	212 days
Level of productivity	212- 15%	180 days
Work of 1 FTE	180/247 * 100%	73%
Needed for 100% cover (of 1 job)	1FTE=73%	1.4 fte
Needed for the Service Desk*	2*1.4	2.8 fte
Needed extra staff for the Service Desk	2.8 - 1	1.8 fte

* i.e. allows for time for training, meetings, comfort and leisure breaks.

It is recognised that the Service Desk will be open for 47.5 hour a week but by using a flexible working system the full day will be covered without a need for extra staff.

KPI's

In order to monitor the quality of the Service Desk, Key Performance Indicators (KPI) has to be agreed. In the table below an overview of possible KPI's for the EFMD Service Desk can found.

Critical Success factor	Performance indicator	Norm/Target
Telephone accessibility	Response Time Times put through	Pick up after 4 rings 80% less than 1 times put through
Customer Satisfaction	Customer satisfaction After care and Evaluation	80% > 5% of the requests
Speed of the delivery of the service	Time response on the request **Delivery time of the service** Priority 1 Priority 2 Priority 3 Priority 4 Priority 5	< 4 hours < 2 hours < 1 working day < 2 working days < 5 working days Agreed date
Employee satisfaction	Sickness	<5%

7. Software suppliers

In Section 4.3 is explained what a CAFM system is, in this Chapter a short overview of the software suppliers for the Service Desk system is given and an advice on which companies to chose to go to tender. The complete document of the Overview of Software Providers can be found as an attachment to this report.

7.1 Buying a CAFM system

The EFMD wants to buy a system that supports the Service Desk and can be expanded with other modules in the future.

Modules

It is the intention to only buy the Service Desk module in the first phase, later other modules could be purchased as required and thus the CAFM system should have this capability. The system must also integrate effectively with existing software packages to reduce the need to duplicate data or replace existing software packages. The Service Desk system will include*:* Web based customer reporting module, Helpdesk task logging module, Management Information Reporting module and an Interface with the EFMD staff completing the tasks (possibly by PDA)

Licences

The total Estates department has 360 staff. Not all these staff need access to the system. In total the EFMD will have around 25 users. The EFMD do not have to buy 25 licences, because not everybody will use the system at the same time. The advice is to buy 10 concurrent user licences. The number of licenses can always be extended in the future.

Tender

After a preselection, the top 6/5 software suppliers will be invited to tender. The tender documents will need to be written in cooperation with IT Services. The quote “seeing is believing” is important in this stage of the Project, that is why it is important to ask the suppliers to show a demonstration of the system. The first impression of the software system is probably they all look the same. The biggest differentiators between the systems are likely to be “how user friendly they are?” and the level of services and support of the provider. If the system is not ‘user friendly’ the system will not be fully used, which will be detrimental to the EFMD. The software company chosen has to deliver the best product for the best price, paying attention to functionality including how user friendly the software is.

Costs

The costs of the system will be dependent on how many licences, which modules, implementation costs integration costs, hardware or external hosting costs and how much training is needed. The costs of the different systems will be finalised during the tender process; at this stage prices are indicative. The maximum budget for this project is £100,000, which would need to be spread over two financial years, 2011 and 2012. An overview of the costs of the different systems can be found in 12.

Overview of software suppliers

In table 7.1 an overview of the contacted software providers for an off the shelf CAFM Service Desk systems is given. In Appendix 11 an overview of the costs of the different system is given.

7.2 Conclusion

The information to compare the suppliers is gathered from the suppliers websites and contact with the suppliers. After reviewing this information, a selection of six software suppliers is left. This Section provides advice on which software providers to invite to tender and which do not meet the requirement. In Appendix 12 an overview of the grading pointing system is given, this document also shows the review criteria. A summary of the total points for each supplier can be found in table. The maximum points that can be obtained are 295.

Nr.	Software Provider	Points
1	Planon	275
2	Planet Fm (Qube)	245
3	Archibus (MASS PLC)	240
4	QFM (SWG)	230
5	Concept (FSI)	210
6	Integrated FM	185
7	SAP	180
8	CAFM Explore	160
9	Tabs FM	160
10	FM Easy (Serco)	155
11	Ultrasys	135
12	TopDesk	115

Table 7.1. Overview of total points

Invited

The software suppliers Planon, Integrated FM (Causeway), Concept (FSI), Archibus (MASS PLC), Planet FM (Qube) and QFM (SWG*)* scored best in the grading list and made a good overall impression. They will be invited for tender. All the systems have experience with integrating with SAP and almost all the systems have experience with integrating with MICAD. The systems also have opportunities to be expandable in the future with other modules, are used by other Universities and are specialised in Facility Management software.

Not invited

The software suppliers CAFM Explore, Tabs FM, FM Easy (Serco), Ultrasys and Topdesk did not meet all the requirements of the EFMD and will not be invited for tender. They all did not meet the requirements in experience with integrating with MICAD and SAP. Other disadvantages of some of the systems were no other universities are using this system, the software is offered in one package and they are not specialised in Facilities Management.

SAP

Because the system does not exist yet and would have to be developed to meet the specific needs of EFMD grading was not possible. That is why average points were given in the table. SAP will not be dismissed from the options because the EFMD does not know yet which option (Off the shelf CAFM system, Helpdesk system or SAP) they want to go for. A disadvantage of SAP is many people are not using the current system because they think it is complicated to use. An advantage of introducing a helpdesk system in SAP is the University already use SAP as a Finance and HR system and the existing, limited EFMD helpdesk is already developed.

8. Conclusion and Recommendations

After answering the sub questions during this research, in this Chapter a conclusion is formulated based on the project definition of this research. Following on this the advice how to implement a Service Desk for the University of Leicester is given.

8.1 Conclusion

Below the main Project Definition can be found.

How can the estates and Facilities management Division prepare itself for the arrival of a Service Desk to work transparently, efficiently and effectively?

In the current situation a few bottlenecks are encountered, that is why the EFMD wants to prepare itself for a Service Desk. Before looking at the ideal situation, examples how other organisations organise their Service Desk were compared**.** All the Universities had a different way of organising and managing their Service Desks. For the University of Leicester, this means there is not one way to organise a Service Desk in an education-based organisation. The information gathered was useful to decide what the EFMD want and what not.

The EFMD defined the Service Desk as a one-stop shop that meets the needs of the customers and provides effective management of tasks within the Division and reliable management information, leading to efficiencies, improved service quality and reduction in service delivery costs. The Service Desk will be open during office hours, will have 2,8 fte and can be contacted in different ways.

The maximum budget for the Service Desk system is £100,000. There are different options for a Service Desk system but at this stage of the project the EFMD does not know yet which one they want to choose. If the EFMD wanted to go for an off the shelf CAFM system research showed the following companies meet their requirements most and will probably be asked to tender: *Planon*, *Integrated FM (Causeway)*, *Concept (FSI)*, *Archibus (MASS PLC)*, *Planet FM (Qube)* and *QFM (SWG)*

The University of Leicester is a big organisation, I encountered some parts of the University are kind of a red tape[1] organisation. It is difficult to get something approved and it is not always known who is responsible for what and who makes what decisions. This will effect this project, because making decisions and approval take longer. This may mean that the project will not finish on time.

Assignment

Except one question, all the sub questions have been answered in the report. There was not enough time to do research about the skills of a Service Desk employee. Besides that in the orientation report, I set a boundary of not describing the current situation. However, after more research it was needed to describe the current situation because the one that was already written was not complete.

Regarding to the conclusion in the next section recommendations are given.

[1] The collection or sequence of forms and procedures required to gain bureaucratic approval for something, especially when oppressively complex and time-consuming. (www.answers.com/topic/red-tape)

8.2 Recommendations

The recommendations are divided in four topics. The main advice is the EFMD need to define what they really want and have a clear and shared vision about this before the Service Desk and software can be implemented.

General

- Keep it simple to start with & develop with time.
- Define which procedures and approvals are needed for this project and adapt this in the time planning to make sure the Service Desk is implemented within the time given.
- Define which role IT services is going to play in the project, agree this with IT and write it down in an agreement.
- Strong management support is needed during and after the project.
- Better communication between different apartments. When the Service Desk is implemented the Service Desk has to keep in touch with the Back Office. This ensures the Service Desk stays up to date and the expectations of both sides stay at the same level.
- Involve users within the project, this makes the service user friendly and the user is more willing to use it.
- Do not focus too much on the software, also look at the processes of the Service Desk.
- Solve staff problems before they are going to work with new procedures.
- When the Service Desk is implemented, first everyone has to be told what the procedures are and then everybody has to start working in an uniform way.

Project team

- Ensure there is enough experienced staff in the project team:
  - support of the project at a senior level
  - a strong project manager
  - a strong dedicated IT person
  - set up a steering group at high level to drive the objectives/aim
- Make clear how much time everybody has for this project.
- Make roles clear within the project team and define processes. With making roles clear, it is important to decide who the main responsible person is for this project.

Service Desk

- Ensure the Service Desk is well published by Staff in the university this ensures they will use it.
- Work with the Back Office to write processes down before the Service Desk is implemented. This ensures the Service Desk staff and the Back Office staffs know the procedure and work in an uniform way. Although it is not possible to write 100% of your process down, try to describe at least 70% of them.

Software

- The Office Management Team(OMT) has to decide as soon as possible which software option is best for the EFMD.
- Take enough time for training and testing the system, this is an important part of the implementation.
- The sales pitch of the software suppliers can be ‘slicker’ than the actual product.
- Involve customers and staff in testing period.

9. Implementation

In this Chapter, an overview of steps to take for the implementation of the Service Desk is given based on the recommendations given in Chapter 8.

9.1 Implementation process

Planning

See Appendix 13 for the overview plan of the implementation.

A condition for a good working Service Desk it is to organise the Back Office before the implementation. This also includes optimizing informal and formal processes. Informal means how people do their job in the way they are used to do it (although this maybe is not the best way to do it). The processes also need to be written down for the people behind the Service Desk.

Phased implementation

The phased approach has been selected to enable the customer to 'get used' to the Service Desk and the process. In Phase 1 the customer 'tries out' the Service Desk and once they discover that the system is reliable they won't try and bypass it and Phase 2 can be implemented. During those 2 phases management support is needed to ensure everybody works in the same way.

In Phase 1 the Service Desk is organised in a mix of the information centre model and the account management model. In Phase 1 the Service Desk will be new for the customer and they will not know how everything works, they will still be able to contact the back office directly and bypass the Service Desk. The back office will respond to requests but tell the customers to use the Service Desk for future calls; this will introduce the customers to the Service Desk. When telling the customers they need to use the Service Desk following times, it is important to tell the advantages of doing this. After three months the customers will be used to the Service Desk, Phase 2 starts. In this Phase the customers will not be able to bypass the Service Desk anymore. Every request will have to go through the Service Desk. During this period good management support will be needed. The customers will also have to be shown why we changed to a Service Desk and what advantages it has for them.

Costs

The implementation of a Service Desk will have the costs below. The costs are split up in investment costs and operation costs. Investment costs are one off payments. The operation costs are costs that will return during the operation of the Service Desk.

Investment costs

- Recruitment
- Training
- Software
- Hardware
- Implementation
- Integration Costs
- Internal costs(employee-time)

Operation costs:

- Personnel costs
- Software licence
- Physical desk m2 costs.
- Software development (upgrades)
- Training
- Integration Costs
- Hardware maintenance
- Backup Costs

9.2 Managing the Change

Changes are usually associated with resistance. This section explains how to deal with this resistance.

Communication

Communication can be described as creating understanding. The quality of communications can have an important impact on the success of the change. There are four decisions that the managers must make around communication in change situations:

1. To whom (EFMD Staff and customers)
2. What (Why do we need a Service Desk, what will change and what are the advantages?)
3. When (At the start of the project until the end of the project)
4. How (Email, face to face, newsletter, presentations, meetings or brainstorm sessions?)

The website 'www.change-management.com' mentions the next points that are important for effective communication. Benchmarking research shows that employees prefer to hear messages from two people in the organization - the person at the top of the change (for messages about the business issues and reasons for change) and their immediate supervisors (for messages about the personal impact of the change). It is important to repeat key messages a number of times. The first time you announce a change to employees, they are often wondering how it will impact them and not focusing on the details of what you are communicating about. Repeating key messages is important to ensure that what want to get across is being heard by employees. Share messages more often than you think you need to. Face-to-face communication was identified at the most effective form of communication. While it is more time intensive, do not underestimate the value that face-to-face communication creates.

Participation

Participation is another key to the change process. Participation can be described as giving an employee the opportunity to have input, and where possible, control, related to the change process, which is to affect them. It is important to talk about the resistance. Employees will feel they are involved and not forgotten. When there is resistance, it is important to clarify where the resistance comes from. In this way, there is a possibility to respond on the resistance.

References and Bibliography

All the resources below were consulted during the period from October 2010 until January 2011.

Books

- Burnes, B. *Managing Change.* Essex, Pearson Education Limited, 2009
- David G. Cotts, Edmond P. Rondeau *The facility manager's guide to finance and budgeting*
- Dorr, D.C. *Presteren met Processen*. Alphen aan den Rijn, Kluwer, 2009
- Hayes, J. *The Theory and Practice of Change Management*. Hampshire, Palgrave, 2002
- Kempen P. en Keizer J. *Competent afstuderen en stagelopen, een deskundig advies.* Groningen, Noordhoff Uitgevers, 2006
- Maas, G.W.A. en Pleunis, J.W.: *Facility Management*. Alphen aan den Rijn, Kluwer, 2006
- Rouw, L de.: *De servicedesk, spin in het facilitaire web*. Alphen aan den Rijn, Kluwer, 2008

Articles

- BIFM, *The BIFM Good Practice Guide to Selecting FM Software, 2008*
- BIFM, *The BIFM Good Practice Guide to Customer Care, 2008*
- Facto media base, *Het facilitaire Servicemeldpunt* ,Schuthof, 2006
- Facto media base, *Self-service voor de Servicedesk*, Ir. M.A. van der Lee en A.J.G. Rappard, 2007
- Facto media base, *Implementeren van een FMIS*, A.C. Stolk, 2007
- Facto media base,*Pakketselectie van een FMIS*,Drs. H. Willemse, 2001
- NPQ FM Solutions, *Return On Investment FMIS (Bij implementatie van Prequest FM Software*), June 2010
- Weekblad facilitair, *Steeds meer taken voor de frontoffice*, nr 162 – 2009
- Overheid Facilitair, *De klant centraal: een succesvolle frontoffice in het facilitair bedrijf*, Leon Paul de Rouw
- Overheid Facilitair, *Het creëren van een successvolle front office deel 2*, Drs. Ing. L.P. de Rouw en Drs. R.H.W. Scherrenburg,
- FMX, *Computer aided Facilities management, The definitive guide*, Sara Bean

Internet

- LinkedIn.nl
- fmresource.nl
- www.bifm.org.uk/bifm/news/3355
- www.umsl.edu/~sauterv/analysis/intro/system.htm
- www3.imperial.ac.uk/facilitiesmanagement/helpdesk
- www.bestpricecomputers.co.uk/glossary/computer-aided-facility-management.htm
- work911.com/managingchange/changekeycommunication1.htm
- www.change-management.com

Interviews

- *Mariska Ammerlaan, Erasmus University Rotterdam* July 2010
- *Oscar Verbeek, Technical University Delft* August 2010
- *Adrian Owen, University of Aston (Birmingham)* October 2010
- *David Corden, University of Nottingham* October 2010
- *Barry Whittles, University of Sheffield* December 2010

Theses:

The theses below were showed from 'hbo.kennisbank.nl'.

- Rappard, Arnout. *Het proffesionaliseren van de facilitaire dienst bij De Telefoongids*, 2006
- Groot de, Anne Wil. *Service Management De weg naar een centrale facilitaire Service Desk voor TCN Property Projects,* 2005
- Schreuders, Rene. *Procesverslag onderzoek "van helpdesk naar servicedesk",* 2008

Estates and Facilities
Management Division

University of Leicester

Appendices
Advice Report

Service Desk

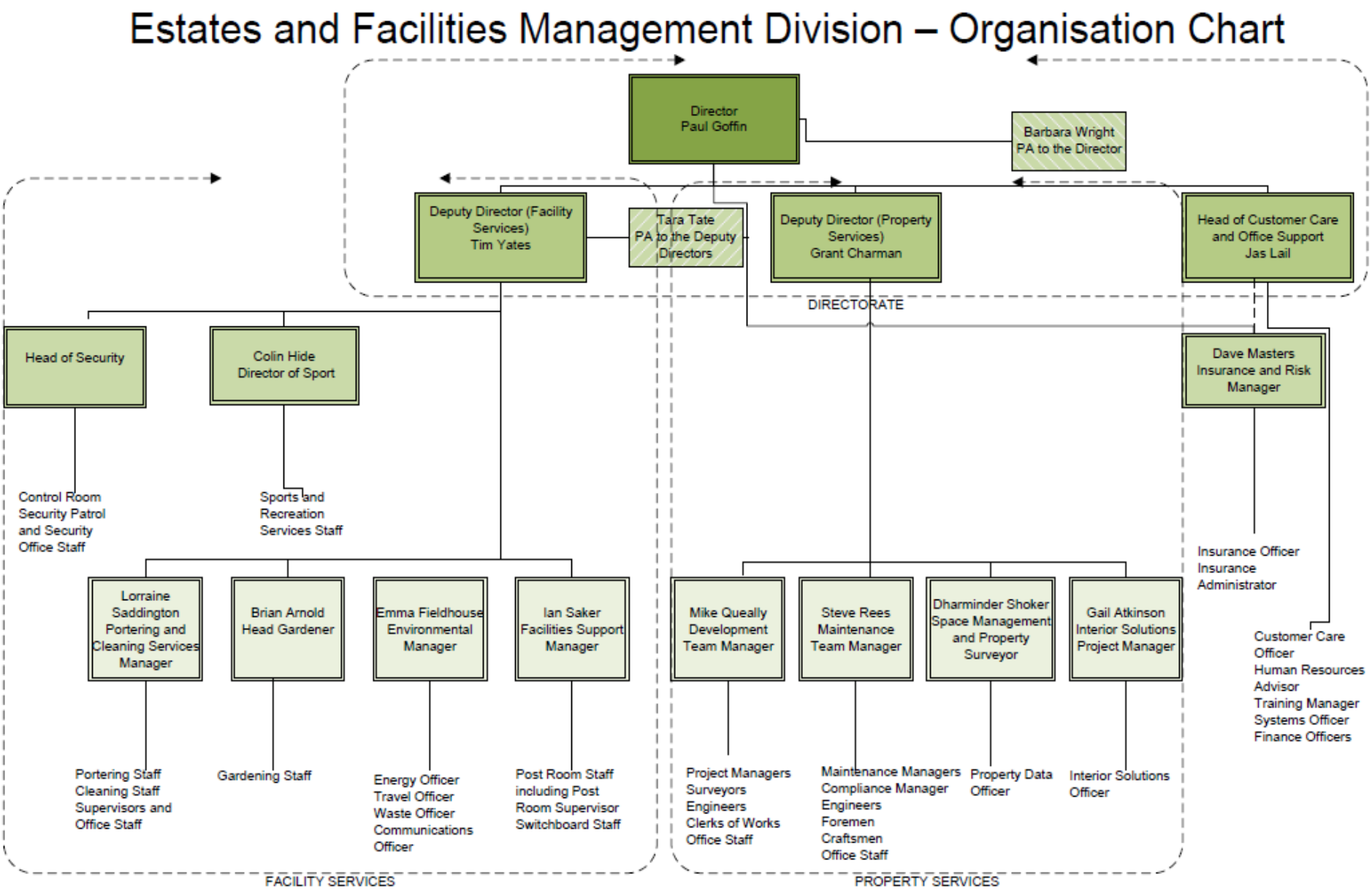
Building a better service!

Author:
Pandora Bol
January 2011

Appendices

Appendix 1. Estates and Facilities Management Division Organisation Chart 3
Appendix 2. Topic list interview Customers 4
Appendix 3. Reports Interviews Customers 5
Appendix 4. Graphic view of the Service Desk models 11
Appendix 5. Implementation Model 12
Appendix 6. Topic List External Interviews 13
Appendix 7. Reports External Interviews 14
Appendix 8. Overview external gathered information 33
Appendix 9. Process of a Request 35
Appendix 10. Overview of ideal situation 36
Appendix 11. Overview of Costs systems 37
Appendix 12. Sheet Grading Pointing System 38
Appendix 13. Implementation Planning 40

Appendix 1. Estates and Facilities Management Division Organisation Chart



Appendix 2. Topic list interview Customers

General

1. What are your main responsibilities?
2. How long have you worked for the university?

Current

1. Which role do you play in contacting the EFMD?
2. How do you report a request?
3. How often do you call the EFMD and which services do you contact?
4. Are you satisfied with the current way of contacting the EFMD?
5. Which bottlenecks do you encounter?
6. What services can the EFMD improve?

Service desk

7. What do you think of an EFMD service desk?
8. Do you think you will have more requests if there is an EFMD service desk?
9. Are you willing to fill in an internet form to make a request?
10. Which way of reporting a request you prefer to use?
11. How can a service desk employee help most?

Appendix 3. Reports Interviews Customers

3.1 Barbara Birch and Jeff Morant

I work for the biochemistry department and am a building contact. Barbara does the financial work for the biochemistry department and reports requests when Jeff is not there. Jeff and Barbara work in the Henry Welcome Building, this building was completed in 2004. The building had/has several major issues. Barbara works for the university for a long time and Jeff works for the university 28 years

Current

1) Which role do you play in contacting the EFMD?

Because I am the building contact, most of the people in the building contact me and I report it to the EFMD. Most of the times I call the maintenance help line to report the request. When it has something to do with cleaning we directly contact our head cleaner Mary

2) How do you report a request?

See question 3.

3) How often do you call the EFMD and which services do you contact?

8-10 requests a day

4) Are you satisfied with the current way of contacting the EFMD?

It is good, But If we want to do a request between 12:30 – 14:00 there is most of the times no one available because everyone goes for a lunch break then. In an emergency, we have to call a lot of phone numbers to finally speak to someone. First when nobody picked up the phone at the maintenance helpline it was directed to Tara Tate, now it does not do that anymore. Therefore, there is no back up helpline. The work the craftsmen do is very good.

5) Which bottlenecks do you encounter?

See question 8.

6) What services can the EFMD improve?

The Maintenance clerks do their job very good when they are here, a good service.

- Sometimes when we do a request electrical it get lost, this happens not very often but sometimes it does. Than we have to do it again. Sometimes they use each other's computers, and on the job ticket it says 1person was responsible for the job and then you ask him but he does not know anything about it because somebody else was behind his computer and it was his job.
- Not often/sometimes the maintenance staffs come to see and they go back and they think the job is closed but they only looked at it.
- Contractors come to our reception with no keys and job tickets. Then we have to stop with we are doing and help them. We also have to watch for the safety.

- When they were plumbers around in this building for 3 months we had to look after them, we have not seen Estates staff to check if the job was done ok. We feel they take a little bit advantage of us. We do not know what happens behind the scene.
- The old maintenance online form was better an easier to fill in, the one they use now you have to fill in a lot and that costs time. If you do not fill in the form properly, it shows the red bits that you have to fill in.
- When we want to go to the estates staff list we have to enter our CFS password, this is a lot of hassle. We can find the contact number of the VC strait away but not from the estates department, are they importer than VC? No. They changed this when they also changed the maintenance form

Service desk

7) What do you think of an EFMD service desk?

If it works, it would be very useful. The switchboard works very well.

8) Do you think you will have more requests if there is an EFMD service desk?

No we don't think there will be more requests.

9) Are you willing to fill in an internet form to make a request?

Yes we will if it is an easy form.

10) Which way of reporting a request you prefer to use?

95% of the building users first come to us to. Jeff checks the priority of the job and send it to estates. We use the online form, we call the helpdesk or we go directly to the people we know.

11) How can a service desk employee help most?

Being friendly and fast.

3.2 Lesley Barnett

Lesley is a building contact in the Adrian Building, this is the home for Biologic science students and research. In the building, they have got some special areas like greenhouses and labs.

I am the departmental service manager, safety officer and the building contact. I take complaints from building users and communicate them to estates. The estates department got a lot better last years. Lesley has a lot of communication with the estates department. I have to make sure my colleagues can do their job. So if the contractors making a lot of noise doing their job I am responsible to say they have to stop. The role as building contact is part of my job description after all those years. I do not really talk with other building contacts. I go to the Estates User Event where all the building contacts and departmental heads go. I also work with the environment team to save energy in this building. I try to help the estates office and the building users as much as I can and they also help me. I work for the university for 37 years now.

Current

1) Which role do you play in contacting the EFMD?

I play a big role in contacting the EFMD. I am a building contact since 1999. It happened by accident. They involved me in different projects.

2) How do you report a request?

I use the online form, the helpline; go direct to people in estates when I know it is a routine maintenance thing. Sometimes I contact the department directly and sometimes I do it by the maintenance helpdesk. For cleaning things I go to Mandy our lead cleaner, ore sometimes to Michelle or cleaning lady at the department. The porters I also contact directly (Pete King zone 3). There is an online form for request for porters but I only use if for big things. Sometimes when I know who the expert is in making something I directly contact them, but after I put always a ticket in the system.

3) How often do you call the EFMD and which services do you contact?

I think I do 1-2 requests a day. However, I also email allot with different departments within the EFMD.

4) Are you satisfied with the current way of contacting the EFMD?

Yes I'm satisfied. I can always phone the helpdesk and if they are not available, I can fill in an online form. With lunchtime most of the time there available, but if there is no one and it is urgent I got numbers of maintenance people like Steve Vickers. If it is urgent, I always can contact the security lodge. The maintenance craftsmen do a really good job. They understand how we work in the buildings and they know the buildings well. Contractors are also very nice.

5) Which bottlenecks do you encounter?

When there went somebody to watch the request and they have to order parts I do not know they have been and I cannot track the job.

6) What services can the EFMD improve?

Maybe the maintenance clerks can have a laminated form which they can stick on the wall when they have to order parts of when it has to be done by another section so people in the building now what's on in the specific area.
A tracking system would be useful if it is easy to use and simple. It has to be logic and make sense. So in the current system are all short terms that are difficult to understand.
When it is a bigger problem that has to go true higher management in the estates department than the maintenance team the job takes a long time.

Service desk

7) What do you think of an EFMD service desk?

I think I would be a great idea. It looks like the way IT Services works. The services for the estates SD would be more difficult than IT Services.

8) Do you think you will have more requests if there is an EFMD service desk?

Yes, I think there will be. More individual people in the buildings will make requests. AS long as they keep me up to date with the things that are happening in the building I am happy with that. Now I do not have to call individual people anymore so all the phone calls and emails will go true the SD.

9) Are you willing to fill in an internet form to make a request?

Yes I think. However, the Estates office has to decide which way of reporting they want to have the best information of the customer. You have to ask specific questions so you get specific answers and that is what you need. Right questions -> right answers

10) Which way of reporting a request you prefer to use?

I do not mind, I use email and the online form a lot. However, I also call.

11) How can a service desk employee help most?

They have to have knowledge and understand, be positive, know information and say what the customer can expect. They also have to make a judgement of the request and prioritise them. I would not mind to take them around this building to show all the systems.

3.3 Rob Davies

Rob works in the new David Wilson Library. This building was completed in 2007. The library is during term time open for 24 hours a day. This means this building is used a lot more so it also need different maintenance. My job title is Head Administration. This concludes: health and safety officer, building contact, training and development, personnel matters. The job as building contact is part of my job description. I am the link between the library and estates. I also work with safety services. However, I have to provide stuff so people can work safe.

For my job as Building contact, I walk every morning around the building and check things. Then I make a list of the faults I discover and put them in the system. I can also see on my list the faults that are not solved yet. I work for the university for 10 months now. Before this job I have worked for several public libraries and therefore I worked in Telecommunication.

Current

1) Which role do you play in contacting the EFMD?

I am the main contact point for the library. Some other staff do also report requests like the lead cleaner.

2) How do you report a request?

Most of the times I do it online. Sometimes I phone people directly (for example with arranging the temperature in the building) or in emergencies. When I make a phone call I sometimes registrar them but sometimes also do not do it.

3) How often do you call the EFMD and which services do you contact?

On a average day I make 5 requests. However, on a busy day it could be 20. I have a map with all the requests I have made, so I can look back if I need it. Karen sends me also a spreadsheet, but I prefer my one spreadsheet. It would be useful if there is an online tracking system where I can see what happened with all the requests and what the status is. The emails they send me that the job is approved ore allocated and the job is finished I never read. Because when you make 20 request a day that means 60 emails for the 20 requests.

4) Are you satisfied with the current way of contacting the EFMD?

The online form is not easy to fill in.

5) Which bottlenecks do you encounter?

The maintenance people do not fix things in a proper way. They do it the same way in each building but each building has to be approached different. I sometimes can get angry about this.
Communication with estates is a big problem. I get no feedback ore progress about the requests.
I am not happy with maintenance; the man who repairs the light bulbs is ok.
Sometimes they send me an email that the job is closed but I am not happy with the result yet. They maybe can do something like they do at IT services. Just ask the people if they are happy and if we can close the job.

6) What services can the EFMD improve?

Planned maintenance

Communication

I think the EFMD talks about a lot of plans but they do not do the things.

Service desk

7) What do you think of an EFMD service desk?

It is a good idea. I think Iain is overtaken by jobs right now. He does a good job but it is not an easy job, he is always busy. I hope this Service Desk will improve the communication between me and the EFMD.

8) Do you think you will have more requests if there is an EFMD service desk?

Yes, I think I will. Because everything goes to 1 point then. However, with the Portering and request I do not know if I will contact the Service Desk, because it is must faster to contact them straight away because they are around the corner from my office.

9) Are you willing to fill in an internet form to make a request?

Yes, I already make many requests by filling in the online form.

10) Which way of reporting a request you prefer to use?

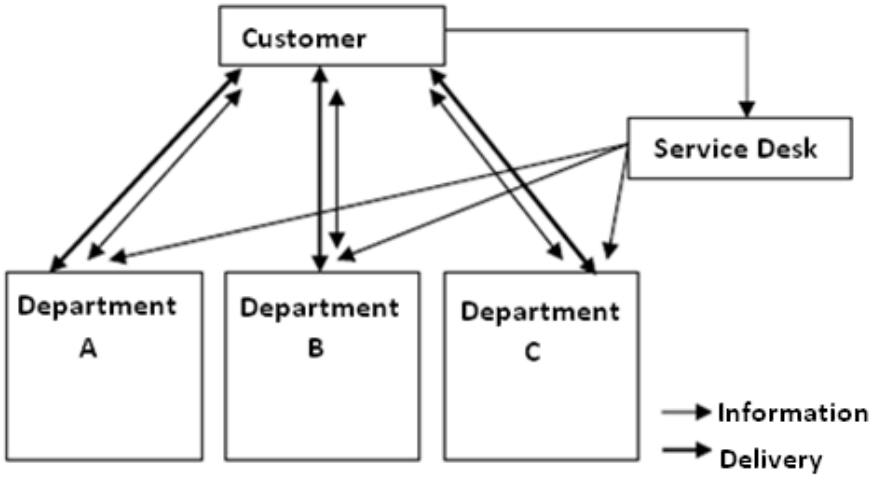
Online, this is the fastest way for me. It would be useful if they change a few settings with the current form. The old form was much better. Now I have to fill in the building, telephone number and name in with every request. The computer only remembers my email address. It is also a lot of scrolling on the page itself, it is too big. The exact location I just copy and paste from the job description.

11) How can a service desk employee help most?

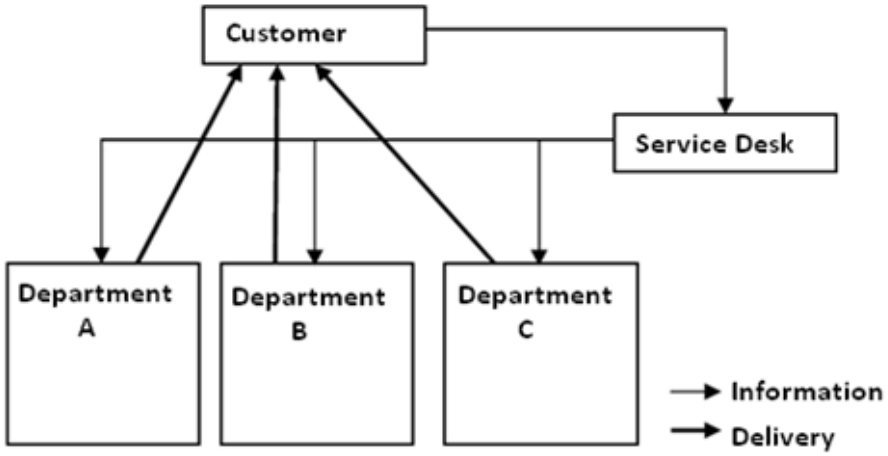
Being able to communicate back to me.

Appendix 4. Graphic view of the Service Desk models

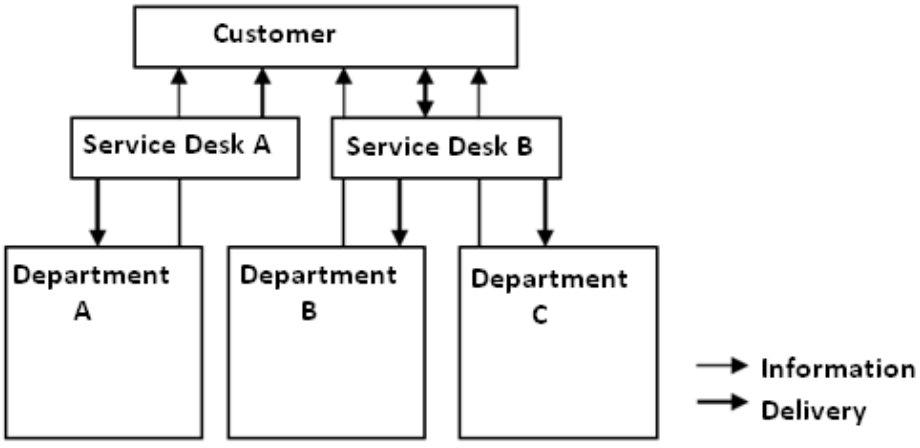
1. Information Centre Model



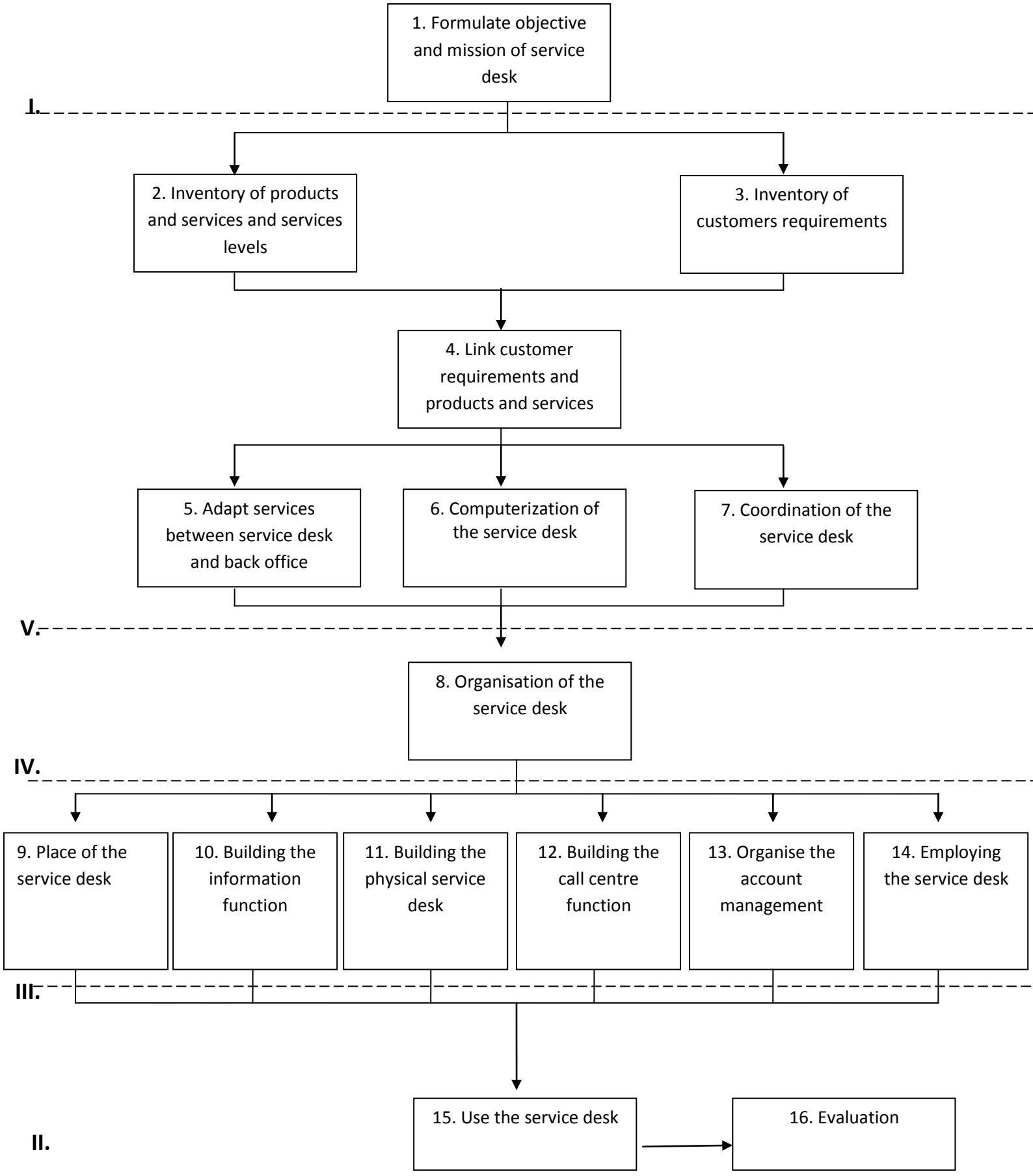
2. Account Management Model



3. Cluster Model



Appendix 5. Implementation Model



Appendix 6. Topic List External Interviews

Introduction

1. Who are you and that do you do for the University?
2. Can you give a description of the Facility Management Division of the University?

The Service Desk

1. Which services does the Service Desk offer?
2. How many employees work at the Service Desk?
3. Which competence does a Service Desk employee have to have?
4. How many customers?
5. What are the times the Service Desk operates?
6. How does the customer contact the Service Desk?
7. Which facility management information system does the department use?
8. How do you take care of customer satisfaction?
9. What happens with a query when it comes in at the Service Desk?
10. How does a query get solved?
11. Which procedures are written down?
12. Are there standard times by which a query has to be answered?
13. How are response times monitored?
14. Are there any systems in place to monitor the quality of the service?
15. How does the current Service Desk function within the organisation?
16. What are the benefits of a facility Service Desk for you? Are there any disadvantages?

Implementation

17. How and when was the Service Desk implemented?
18. How was this communicated during and after implementing the Service Desk and with whom?
19. Which people were involved in implementing the Service Desk?
20. What were the costs of implementing the Service Desk?
21. Which steps were followed before the employees got to work behind the Service Desk?
22. What problems have you encountered when implementing the Service Desk?
23. Have you done an evaluation and were the results matching with the expectations of the customers? If so, what was the result?
24. Do you further have any suggestions or comments that apply to this research?

Appendix 7. Reports External Interviews

7.1 Erasmus University

Naam : Mariska Ammerlaan
Functie : Afdelingshoofd servicedesk

Ik werk hier nu 2 jaar. Mijn eerste werkdag was ook de dag dat de servicedesk draaiend was. Hiervoor heb ik bij een detacheringbedrijf gewerkt en bij het Erasmus medisch centrum. In 2002 ben ik afgestuurd op de Haagse hogeschool voor Facility Management. De taken die ik moet doen zijn. Ik moet de afdeling draaiende houden, zorgen dat de systemen goed zijn, personeelsmanagement en daarnaast doe ik een aantal projecten. Zoals het geven van managementinformatie en communiceren met de back office over openstaande meldingen. Daarnaast ben ik we redacteur van de website van het facilitair bedrijf.

Het Erasmus facilitair bedrijf heeft ongeveer 65 fte en 80 medewerkers. Daarnaast zijn er nog een groot aantal externe medewerkers. De klanten zijn de medewerkers op de gehele Erasmus universiteit en de studenten. Er zijn ongeveer 2500 medewerkers, en 20 000 studenten.
Wij hebben veel contact met de studieverenigingen en wat minder met de studenten zelf. Het EFB is onderverdeeld in 3 units. De schoonmaak, catering, beveiliging is uitbesteed. De beveiliging is voor de helft uitbesteed en voor de helft binnenhuis. Dit heeft als voordeel dat je wanneer intern personeel met pensioen gaat bijvoorbeeld, je het externe personeel goed kent en daar iemand van in dienst nemen.

De Servicedesk

1) Hoe kan de klant de servicedesk bereiken?

De servicedesk is op 3 manieren bereikbaar, via de email, telefoon en via balies. De Erasmus universiteit bestaat uit 15 gebouwen. Er zijn 4 balies aanwezig. Deze servicedesken vervullen ook receptietaken zoals het aannemen van telefoontjes die voor de universiteit zijn. Bij deze balies zijn dus 2 lijnen een Erasmus lijn en een Servicedesk lijn. De medewerkers kunnen zien wanneer er voor de Erasmus lijn of voor de servicedesk lijn gebeld wordt. Het liefst willen ze dat de klanten meldingen via de email doen. Naast de email, telefoon en balies is er op elke faculteit een contactpersoon aanwezig waar de klanten hun meldingen kwijt kunnen. Deze contactpersoon communiceert dit door naar het facilitair bedrijf.

2) Welke Facility management informatie systeem gebruiken jullie?

Wij hebben Planon als FMIS systeem. De facilitaire organisatie werkte al met Planon voordat deze in gebruik werd genomen op de servicedesk sinds 2004. Om die reden was Planon uitgangspunt in de nieuwe organisatie en is er niet gekeken naar andere systemen. We zijn hier tevreden mee, het bergt wel veel onderhoudt. Planon voldoet aan onze eisen, maar is niet heel erg gebruiksvriendelijk. Wij gebruiken Planon ook voor managementinformatie. Voordeel van Planon is, dat je alle informatie die erin zit, ook in een rapport zichtbaar kunt maken. Nadeel van Planon is, dat het zichtbaar maken van die gegevens niet handig werkt. Daarom exporteer ik de gegevens altijd vanuit Planon naar Excel. In Excel maak ik vervolgens tabellen en grafieken en beschrijf ik m'n analyse.

3) Hoe zorgen jullie voor de klanttevredenheid?

Door duidelijke verwachtingen te scheppen aan de klant. Zoals in een meldings bevestiging aan te geven hoelang de klant ongeveer kan verwachten totdat de melding is opgelost. Ook communiceren wij met de klant wanneer een melding bijvoorbeeld wat langere tijd nodig heeft om opgelost te worden en leggen wij uit wat daarvoor de redenen zijn. En wanneer er bijzondere dingen zijn zoals een nieuwe cateraar proberen wij dit met de klant te communiceren. Daarnaast maken wij gebruik van een klanttevredenheidsonderzoek. In het onderzoek wat 1 jaar geleden is uitgevoerd kwam het facilitair bedrijf op gemiddeld een 7.2.

4) Wat gebeurt er met een melding als deze binnenkomt?

Zie vraag 5.

5) Hoe wordt een melding opgelost?

De eerste stap voor de servicedesk medewerkers is het vragen van de vragen die als standaard vragen in Planon gemeld staan. Per onderwerp of gebeurtenis zijn er verschillende vragen bedacht door de back office. We proberen de servicedesk medewerkers te motiveren om aan het eind van het gesprek even een samenvatting te laten doen zodat de klant kan controleren of de melding klopt en of hij misschien nog andere meldingen heeft. De medewerker vult vervolgens alle velden in en stuur een meldingsbevestiging naar de klant. De Backoffice zal de melding verder oplossen. Is het een urgente melding dan zullen de servicedesk medewerkers de Back office bellen om te zeggen dat er een urgente melding is. De Back office beslist vervolgens of er nog meer contact met de klant nodig ius om het probleem duidelijker te maken. Is dit het geval wordt hetgene wat afgesproken/besproken wordt met de klant in Planon gemeld bij de al gemelde melding. En wordt vervolgens opgelost en afgemeld. Is er geen contact met de klant wordt de melding gelijk uitgevoerd en wordt de melding gereed gemeld. In beide gevallen zal de klant een gereed melding ontvangen.

Wij hebben een project gehad waarin ze wilden gaan werken met Pda's maar dit onderzoek is niet doorgegaan omdat we niet de juiste ICT benodigdheden tot onze beschikking hadden. Wat ook lastig kan zijn is hoe de verschillende 'werkbonnen 'verdeeld moeten worden onder de technische medewerkers.

6) Welke processen zijn er omschreven?

Er is per facilitair onderwerp een flowchart gemaakt en omschreven welke vragen de servicedeskmedewerker moet stellen om uiteindelijk de melding te kunnen oplossen. AL deze processen zitten in 1 groot handboek. In dit handboek staat ook duidelijk omschreven hoe de servicedeskmedewerkers de telefoon moeten opnemen. Deze processen zijn al omschreven nog voordat de servicedesk in zijn werk ging.

7) Bestaan er duidelijke afspraken over de tijd en kwaliteit van de diensten?

De servicedesk medewerkers moeten binnen 15 seconde de telefoon opnemen. We laten dit testen door een extern bedrijf (Synoveel). Ik krijg een aantal keer per jaar een rapport hierover. Daarnaast moet een melding binnen een bepaalde tijd opgelost zijn zoals de afgesproken normen. Deze normen verschillen per melding en probleem. We proberen de kwaliteit te waarborgen door naar de klant te luisteren. Ook laten wij de klant zien wat ze kunnen verwachten dit doen we bijvoorbeeld door veel kenbaar te maken op de website van het facilitair bedrijf.

8) Hoe functioneert de huidige servicedesk binnen de organisatie?

Ik heb een groei gezien in de organisatie. Iedereen in het team heeft een plek kunnen vinden na 2 jaar. We hebben een vast team en daarnaast nog een aantal oproepkrachten. Het team bestaat uit 12 personen. De oproepkrachten bestaan uit onder andere studenten van de Universiteit. De openingstijden van de servicedesk zijn voor de balies verschillend. De ene balie is open van 8:00 tot 16:00 en andere is open van 08:00 tot 18:00. Daarnaast is er een balie die open is van 8:00 tot 21:00. De telefoonlijn staat open van 08:00 tot 21:00 en op vrijdag tot 16:00.

9) Wat zijn voor jullie de voordelen van een facilitaire servicedesk? Zijn er ook nadelen?

De voordelen van een servicedesk voor ons zijn dat de backoffice zich kan richten op zijn eigen expertise. Daarnaast kan de servicedesk professioneel en klantgericht te werk gaan. Voor de klant is ook de voordeel dat het facilitair bedrijf altijd bereikbaar is en alles wordt geregistreerd. Alle telefoontjes en nee registraties worden geregistreerd. Dit zorgt ervoor dat de managementinformatie optimaal en compleet is.

Een nadeel van de servicedesk is dat de communicatie kanalen langer zijn waardoor er sneller fouten kunnen ontstaan. Een ander nadeel is het feit dat de servicedeskmedewerkers niet beschikken over de technische kennis die soms nodig is waardoor ze de klant niet optimaal kunnen helpen en een collega ze later nog eens moet terug bellen.

Implementatie

10) Hoe en wanneer is de servicedesk geïmplementeerd?

2 jaar geleden is de servicedesk geïmplementeerd. Het project is begonnen begin 2008 en juni 2008 was de eerste draaidag. We hebben bijna geen promotie gedaan voor de servicedesk. We hebben wel op onze website aangegeven dat we een servicedesk kregen en via een nieuwsbrief een melding gemaakt. Op het Erasmus MC hadden ze de promotie heel anders aangepakt. Ze hadden toeters met daarop het nummer van de servicedesk, de zoveelste beller kon een prijs winnen.
De medewerkers van het facilitair bedrijf reageerden wisselend. De hele structuur van het facilitair bedrijf werd anders namelijk een front en back office. We zijn met alle medewerkers goed in gesprek gegaan.
Het project heeft ongeveer een half jaar geduurd. De projectleden waren niet fulltime met het project bezig. Er is ongeveer 3 uur per week in de eerste drie maanden en de laatste drie maanden ongeveer 15 uur per week gewerkt aan het project.

De gevolgen voor de medewerkers waren divers. Sommigen kregen een meer uitdagende functie, anderen kwamen in een functie terecht dit niet voldeed aan hun wensen. Wel hebben bijna alle medewerkers een nieuwe functie gekregen waar ze zelf op gesolliciteerd hadden. Sommigen kregen een andere werkplek en andere collega's binnen het team. Het managementteam veranderde niet, dus de koers die was ingezet kreeg een vervolg.
De meeste medewerkers moesten erg wennen aan het werken binnen hun eigen specialisme. De technische man is nu meer met techniek bezig en minder met klantcontact. Dat is wennen, maar het is uiteindelijk wel efficiënter gebleken. Mensen doen waar ze goed in zijn.
Voor de organisatie was de belangrijkste verandering dat er vraaggericht gewerkt ging worden waarbij goede communicatie een speerpunt werd.

11) Met wie en hoe is er gecommuniceerd voor tijdens en na het implementeren van de servicedesk?

Intern is er veel gecommuniceerd. Daarnaast hebben we alle stafafdelingen op de hoogte gesteld (HR & Finance). De studenten zijn via de website op de hoogte gebracht. En de studieverenigingen hebben we een gesprek mee gehad. Ook is er onbewust Mond tot mond reclame toegepast.

12) Wie waren er betrokken bij het implementeren van de servicedesk?

De manager van de frontoffice, de stafdienst, ICT, de Afdelingshoofden van de universiteit, de backoffice en de eigen medewerkers.

13) Welke kosten zijn er geweest bij het implementeren van de servicedesk?

Er zij natuurlijk manuren gemaakt voor het implementeren van de servicedesk maar ik zou niet weten hoeveel dit geweest is. Dit is ook niet bijgehouden. Daarnaast is Planon ingericht op de servicedesk, we hadden Planon natuurlijk al dus dit heeft niet heel erg veel kosten met zich meegebracht, we hebben ook vel zelf gedaan.

14) Welke stappen worden/zijn gevolgd voordat de servicedesk medewerkers aan het werk gaan/gingen?

We hebben eerst de medewerkers gezocht. Hierbij hebben we gelet op de geschiktheid van de functie. Hiervoor hebben e een functieprofiel opgemaakt en de competenties die je moet bezitten omschreven. Daarna zijn (sommige) medewerkers betrokken bij het project. Toen het team compleet was (dit waren mensen die al in de organisatie werkt en nieuw aangenomen personeel) zijn de processen doorgenomen die vooraf door de backoffice bedacht zijn. Ook heeft het personeel een Planon training gehad. Ook is er een document gemaakt met uitleg hoe je de telefoon opneemt en dit is ook besproken in de groep. Daarna zijn er natuurlijk altijd dingen die de medewerkers niet snappen, ik heb zoveel mogelijk gevraagd of de medewerkers dit wilden aangeven. In het begin werd ik helemaal overspoeld. Toen heb ik de medewerkers alle punten die ze tegen kwamen in een document laten zetten die ze continu bijhielden. Hieruit heb ik steeds punten gepakt die belangrijk waren want je kunt niet alles tegelijk aanpakken, je moet prioriteiten stellen. Het is belangrijk dat alle medewerkers het zelfde weten, dus als 1 medewerker een vraag stelt is het handig om dit aan alle medewerkers uit te leggen.

15) Welke knelpunten zijn jullie tegengekomen bij het implementeren van een servicedesk?

Het systeem werkt niet altijd zoals je wilt dat het werkt. Er zij soms bijvoorbeeld onverwachte meldingen waarvan je niet weet waar je deze moet plaatsen in Planon. Daarom is daar nu een kopje algemene zaken en algemene technische zaken aangemaakt waar alles zelf ingevuld kan worden door de servicedesk medewerker. Zo wordt toch alles geregistreerd. Ook is het soms lastig met de openingstijen met ziekte bijvoorbeeld. Wanneer een medewerker ziek is waar maar 1 persoon achter de balie zit is het lastig om vervanging te regelen. De oproepkrachten kunnen ook niet altijd, soms wordt dan de beveiliging ingeschakeld, en als het echt niet lukt, gaat de balie dicht en wordt de telefoon doorverbonden een andere afdeling.

16) Hebben jullie een evaluatie gedaan naar de resultaten en of ze overeenkwamen met de verwachting van de klanten? Zo ja, Wat was de uitkomst?

We hebben niet een hele grondige evaluatie gedaan. Wel hebben we natuurlijk de klanttevredenheidsonderzoek uitgevoerd en we bespreken alles met de afdelingshoofden tijdens vergadering. Hier komt altijd veel naar boven. Ik heb ook aangegeven dat de afdelingshoofden altijd dingen kunnen vragen.

17) Heeft u verder nog tips of op en aanmerkingen die van toepassing zijn op het onderzoek?

De voordeur –achterdeur principe. Benoem de voordelen van de klant om alles via de servicedesk(voordeur) te melden en niet bij personen die ze op de gaan zien lopen(achterdeur)
In gesprek blijven met de backoffice. Dit zorgt er voor dat alle informatie up tot date is en dat de verwachtingen van elkaar gelijk blijven.
De backoffice bepaald wat de servicedesk doet. De SD kan bijvoorbeeld niet bepalen hoe snel iets moet worden opgelost dit moet daarom in overleg met de backoffice worden vastgelegd zodat beide afdelingen met de tijden kunnen werken. Dit kan het beste gedaan worden voordat de servicedesk gaat draaien. Zorg dat de SD herkenbaar is in de organisatie.

7.2 Technical University Delft

Naam : Oscar Verbeek
Functie : Coördinator Servicedesk van 3 servicepunten

De servicepunten Civiel en Bouw vallen onder hem. Hij zorgt ervoor dat alles goed verloopt. Daarnaast doet hij ook een aantal kleine projecten en is eigenlijk overal en nergens. Er zijn in totaal 9 servicepunten binnen de TU delft. Door een grote reorganisatie zijn de afdelingen ICT en FM en klanten nu bij elkaar gekomen en opgedeeld in 9 servicepunten. Elke faculteit heeft zijn eigen servicepunt. Eerst waren er allemaal losse punten, voor de klant was het niet duidelijke waar zij moesten zijn voor een bepaalde melding of probleem. Elke faculteit betaalt ons voor de servicedesk.

Door de reorganisatie is het voor de klanten makkelijker een melding te maken of hun probleem op te lossen, daarnaast heeft het ook door bezuiniging geleid omdat je al je persoon bundelt. De servicedesk is nu het visitekaartje voor de gehele organisatie. Op elke servicedesk zitten 3 fte. Daar ben ik bij mee gerekend. Elk gebouw heeft zijn eigen Fm afdeling, IT afdeling. Het verschilt per gebouw hoeveel personen er op deze afdelingen werken. Door de 80/20 regel te hanteren willen we voor. De 80/20 regel houdt in dat 80% gestandaardiseerde diensten zijn binnen elke faculteit en de 20% zijn de diensten die anders zijn dan normaal. Door deze regel kunnen de medewerkers van de servicedesken van alle faculteiten op alle servicedesken te werk gaan. Alle diensten zijn omschreven, zo ook de 20% per faculteit die anders is. Een voorbeeld hiervan zijn de collectieve waarden.

De Service Desk

1) Hoe kan de klant de servicedesk bereiken?

De klant kan de servicedesk bereiken door te bellen, mailen of langskomen langs de fysieke desk. Op elke faculteit zit 1 fysieke servicedesk bij de ingang van het gebouw. Studenten maken veel gebruik van de servicedesk. Op facilitair vlak is dit minder, alleen bij de problemen waar hun last van hebben maken ze een melding. Als ze bijvoorbeeld zien dat er 1 lamp op de wc kapot is maken ze geen melding maar als ze geen stroom hebben om te computeren dan maken ze bijvoorbeeld wel een melding.

2) Welke Facility management informatie systeem gebruiken jullie?

Wij gebruiken geen facility management systeem maar een registratiesysteem. Dit systeem heet Infra Enterprise.

3) Hoe zorgen jullie voor de klanttevredenheid?

Het is belangrijk om met de belangrijkste klanten te praten en te onderzoeken wat zij van ons verwachten en welke knelpunten zij tegen komen. Dit doen wij door aan de klant te vragen, wat moeten wij doen om bij jullie een 8 te scoren? En waar heb je last van?

Met het beschrijven van de PDC hebben we eerst de belangrijkste zaken beschreven. Zo zie je al snel resultaat. Bij elke product of dienst staan omschreven voor wie, hoe je het kan aanvragen, wat te doen bij een storing, de doorlooptijd en de kosten. Om ons aan de doorlooptijd te houden hebben we per product of dienst eigenaren benoemd die ervoor zorgen dat die doorlooptijd ook daadwerkelijk gehaald wordt.

Daarnaast belt 1 medewerker van ons 3 klanten per week en vraagt een aantal vragen over de dienst die ze geleverd hebben.

Ook hebben we 1 keer een onafhankelijk bedrijf ingehuurd die onze dienst heeft beoordeeld, de zogenaamde mysterie shopper. Dit is voor ons heel nuttig geweest, een voorbeeld hiervan is bij de fysieke desk. De beeldschermen van de computer zijn erg groot, de mysterie shopper vond dit niet klantvriendelijk. Daarom staan de beeldschermen nu schuin, zo zijn onze medewerkers beter zichtbaar

4) Wat gebeurt er met een melding als deze binnenkomt?

Een kleine melding (zoals het aanmaken van een dagkaart) wordt direct uitgevoerd. Dit zijn dingen die binnen 5 minuten gedaan zijn. Deze meldingen worden geregistreerd door middel van een turflijst. Wat grotere meldingen worden direct geregistreerd in het Infra systeem. Zaken zoals naam, probleem, urgentie, gebouw, medium (telefoon, mail, fysiek) van de melding worden hierin geregistreerd. Nadat de melding geregistreerd is, krijgt de klant een bevestigingsmail dat de melding geregistreerd is. De klant krijgt daarbij een melding nummer, met dit nummer kan de melding via het intranet worden gevolgd. Dit heeft het voordeel dat de klant de servicedesk niet belt of zijn melding al gereed is, want dit kan hij/zij op intranet bekijken. Wanneer de melding klaar is wordt deze afgemeld door de afdeling, de servicedesk meldt de melding vervolgens af in het systeem. Ook hierbij krijgt de klant een email.

5) Hoe wordt een melding opgelost?

De Servicedesk zet de melding uit naar de juiste afdeling.

6) Welke procedures zijn er omschreven?

We hebben op elke servicedesk een flapper staan met daarin een aantal handige informatie bronnen. Zoals hoeveel vierkante meter elk gebouw is, de codes van de printers en codes van de automaten en telefoonnummers.

7) Bestaan er duidelijke afspraken over de tijd en kwaliteit van de diensten?

Doorlooptijd is beschreven. We zijn nu bezig met het instellen van een voicemail. Het is voor de servicedesk medewerkers lastig om te kiezen om eerst de klant te helpen die voor de balie gaat of eerst de telefoon op te nemen. We zijn nu over een oplossing aan het denken. We hebben de servicedesk medewerkers wel meegegeven om de vraag achter de vraag te achterhalen. Dit is belangrijk zodat het juiste probleem geregistreerd wordt.

8) Hoe functioneert de huidige servicedesk binnen de organisatie?

Het werkt goed.

9) Wat zijn voor jullie de voordelen van een facilitaire servicedesk? Zijn er ook nadelen?

Een nadeel van 1 centrale servicedesk voor alle diensten is dat de servicedesk soms als " afvoerputje" wordt gezien. De gekste meldingen worden gemaakt, en veel wordt ook gewoon " gedumpt" bij de servicedesk omdat dit makkelijk is. Een ander nadeel is het personeelstekort bij ziekte, maar dat hebben we opgelost door alles te standaardiseren op alle faculteit.

Implementatie

10) Hoe en wanneer is de servicedesk geïmplementeerd?
Dat is 4/5 jaar geleden gebeurd tijdens een grote reorganisatie binnen de TU Delft.

11) Met wie en hoe is er gecommuniceerd voor tijdens en na het implementeren van de servicedesk?
Omdat het een hele grote reorganisatie was waarbij ook andere afdelingen betrokken waren is er niet specifiek naar de klant gecommuniceerd, er was meer een algemene communicatie. Omdat er zoveel werd veranderd. Nu hebben we interne nieuwsbrieven voor de servicedesk.

12) Wie waren er betrokken bij het implementeren van de servicedesk?
Hoofd ICT, Fm, onderwijs.

13) Welke kosten zijn er geweest bij het implementeren van de servicedesk?
Er zullen heel veel kosten zijn geweest, bijvoorbeeld het registratiesysteem en de verbouwing. Ik weet niet hoeveel het precies geweest is.

14) Welke stappen worden/zijn gevolgd voordat de servicedesk medewerkers aan het werk gaan/gingen?
Er zijn mensen weggegaan en andere mensen aangenomen. Vooral personen van de ICT afdeling wilden niet op een servicedesk komen te werken. Hun hart lag bij de ICT en niet bij de servicedesk. Alle medewerkers hebben een cursus klanttevredenheid gehad. En daarnaast ook een soort psychologische cursus, en een Engelse cursus. Verder is alle specifieke kennis overgedragen door het persoon naar het personeel. ICT heeft bijvoorbeeld alles uitgelegd aan het Fm personeel en andersom. Ook is er veel beschreven op papier, zodat de medewerkers altijd iets kunnen opzoeken als ze iets niet weten.

Sinds 2 jaar hebben we een nieuwe manager, die werkt met de bottum up benadering. Dit zorgt ervoor dat de medewerkers ook mee denken in het proces en zelf ook aangeven wat ze willen en nodig hebben.

15) Welke knelpunten zijn jullie tegengekomen bij het implementeren van een servicedesk?
Omdat het een hele grote reorganisatie was, was het lastig om te bepalen wie nou de baas was.

16) Hebben jullie een evaluatie gedaan naar de resultaten en of ze overeenkwamen met de verwachting van de klanten? Zo ja, Wat was de uitkomst?
Er is een algemene evaluatie geweest van de TU delft en wij praten veel met de klant.

17) Heeft u verder nog tips of op en aanmerkingen die van toepassing zijn op het onderzoek?
Zorg voor vaste medewerkers, ook oudere ervaren medewerkers, en niet allen jonge mensen. Die veel weten. Herkenbaarheid is goed, de medewerker kent de klant en andersom. Als de ene secretaresse met nood belt die altijd haast heeft, weten de medewerkers dat het niet heel spoedig hoeft te zijn, maar is het de secretaresse die nooit belt en nu een spoedmelding maakt weten ze dat die boven aan de lijst moet staan. Het is belangrijk om genoeg servicepunten te hebben.

7.3 University of Nottingham

Name : David Corden
Function : Administration & Business Systems Manager

The estates department is a large department, £50m + spend some years on capital development. About £4m of this is on maintenance. Sections consist of Helpdesk and Administration, Surveyors, Grounds, Engineering, DLO (Direct Labour Organisation), Space Management, Developments, Sustainability, Transport & Logistics and Directorate.

The Service Desk

1) Which services does the Service Desk offer?

Maintenance predominately, Porter and Cleaner jobs, transport jobs etc.

2) How many employees work at the Service Desk?

David shares an office with his administrative team, there are 6 other administrative staff in the office and 5 of them are trained to take help desk calls. Two members of staff are dedicated help desk operatives who wear headsets; calls are forwarded when the first phones are busy ensuring that every call to the help desk is answered and phones are not engaged. There is a reception desk to which visitors to the Estates Office report; the member of staff on the desk does not normally take Help Desk calls. After 5:00 p.m., calls are forwarded to the 24 hour Security Service, the service has a list of contractors to call out for emergencies.

Help Desk Staff only take calls for priority 1 (emergency within one hour) and priority 2 (urgent within 24 hour) jobs. For all other works, staffs are asked to complete the on-line form, which also feeds into the system. This ensures that although the system logs 38000 jobs a year (roughly 4 times the amount that Leicester record) the help line is never overloaded. The main business of the help desk is for maintenance but they do take calls for moving (Portering), cleaning and transport.

3) Which competence does a Service Desk employee have to have?

Fast typist, understanding with people with foreign languages, customer service, ability to stay calm, accuracy, attention to detail, thoroughness.

4) How many customers?

Potentially all students and staff, but there is a hard core of about 100 key people (facilities managers, school heads etc) that report jobs to us in the main.

5) What are the times the Service Desk operates?

8am to 5pm week days, which is achieved by a staggered work pattern, as our working week is 36.25 hours Security takes over at Out of office hours. They call contractors to get the job done. In that way we do not have to pay our staff overtime.

6) How does the customer contact the Service Desk?

Online form (which goes straight into our database), phone, email, fax, in person, follow on job etc. Before I came here, people contact persons in the EFMD directly. Now we are so far we told people not to do that anymore and almost 70% of all the requests are done with the online web form.

7) Which facility management information system does the department use?

Concept, from FSI, www.fsi.co.uk. This system delivers a lot of our fm software:
Helpdesk
Planned Maintenance
Asset control
Ordering
Estate store
Purchase

For the system, we have 18 licences. We do not have a lot of contact with the software supplier. I do a lot myself. I use the workflow bit most. This system is also able to connect jobs to each other. Besides this system we have made our own space management and project management software. Agresso is the financial system the university use.

To let the maintenance people know there is a job for them, we send them a text message. We also send them a text message when their the thing they ordered in the maintenance store is there. In this way, there are no queues anymore at the maintenance store.

All management information reports and workflow schedules are written by David, who has a good understanding of the system. The workflow application enables him to write reports to automate tasks; e.g. the craftsmen can close a job by texting the job number back to the system which converts it to an email to ask the system to mark the job as closed.

8) How do you take care of customer satisfaction?

At the moment, we do not in particular. We send automatic emails of new job numbers and an email on completion. If the customer is unhappy then they are encouraged to email a reply and we will investigate and go back to them / make a note on the job. We try not to give the customer the opportunity to complain as the majority of our jobs go without incident and customers will only complain / moan about the odd job. The most common one is that the job has not yet been done, when in fact it has, but the customer has not bothered to check and simply chased it up.

9) What happens with a query when it comes in at the Service Desk?

We access it against a set of priorities, write it down and then input it into the system ASAP.

10) How does a query get solved?

By being followed up until the customer is satisfied with the response, or being escalated to me if needs be and a note made on the job.

11) Which procedures are written down?

Very few, many those relating to the assign of priority and when to extend the date on jobs etc.

12) Are there standard times by which a query has to be answered?

We do not have one, there has never been a need. We do have priorities, see the list below.

Priority	Response Time
Priority 1: Emergency	Immediate <1 Hour

Priority 2: Urgent	24 Hours
Priority 3: Standard	7 Days
Priority 4: Normal	Agreed Date

13) How is response times monitored?

Yes, we have recently started recording times on jobs more accurately and will be monitoring this thoroughly for our KPI's moving forward.

On the job form of the maintenance man and the contractors they now have to fill in what they did at each part of the job and how long it took (Durations of work). I now could calculate the average time to do a job. With planning the work, we now can give an estimated time for each job. Having an average time gives the craftsmen the real time they can do the job

14) Are there any systems in place to monitor the quality of the service?

No, other than our KPI's. We got two different KPI's.
Level 1 is reached if somebody when to see what the request was about before it has to be done
Level 2 is reached when the job is done before it has to be done.

15) How does the current Service Desk function within the organisation?

It is the essential first contact for the Estates Office and is involved in every aspect, aside from Developments and Sustainability for the most part

16) What are the benefits of a facility Service Desk for you? Are there any disadvantages?

One point of contact, traceable jobs etc. I do not see a downside. If a facilities department is without a helpdesk then they should get one!

Implementation

17) How and when was the Service Desk implemented?

1999

18) How was this communicated during and after implementing the Service Desk and with whom?

Not sure, I was employed in 2005.

19) Which people were involved in implementing the Service Desk?

My Director and the Office Manager at the time

20) What were the costs of implementing the Service Desk?

Software costs, software support costs, some training, office stationary and IT and then labour costs

21) Which steps were followed before the employees got to work behind the Service Desk?

An induction. We would not typically employ somebody without Helpdesk experience. The rest is learned through mentoring on the job

22) What problems have you encountered when implementing the Service Desk?

None

23) Have you done an evaluation and were the results matching with the expectations of the customers? If so, what was the result?

No

24) Do you further have any suggestions or comments that apply to this research?

Be careful the Service Desk does not become a switchboard. If contractors fill in their working hours online that would save time entering data and the contractors were paid earlier.

7.4 Aston University of Birmingham

Adrian Owen is the Facilities and Resources Manager for Aston University; Aston has recently implemented a new Help Desk Software System, Planon. Responsibilities of Adrian are: Budgets/Financial Control, EMS reporting, KPI'S & Management information, Rates/Rental or Lease Agreements, Maintenance Stores and Process & Systems.

The estates and facilities management division split up last year. We do cleaning and some parts of maintenance in house. Some other parts of maintenance are outsourced. The cleaning for the residences is outsourced.

The service/help desk

1) Which services does the Service Desk offer?
Maintenance (Emergency or otherwise), Porters, Cleaners (spillages or problems) and general enquiries regarding Estates or Facilities.

2) How many employees work at the Service Desk?
One helpdesk operative, but she is off sick for quite a long time the moment. Therefore, we have an external person to operate the helpdesk. We got two other ladies who cover the helpdesk person, when she is just sick for one week.

3) Which competence does a Service Desk employee have to have?
n/a

4) How many customers?
Circa 1,200 FTE staff and circa 8,500 students.

5) What are the times the Service Desk operates?
Between 8:00am & 5:00pm. Out of hour's phone if forwarded to Security for emergencies

6) How does the customer contact the Service Desk?
Email or telephone. We do not have an online web form. We are trying to implement one do. Adrian showed the test sample of the web form and how it generated whit Planon.

7) Which facility management information system does the department use?
Planon, we implemented Planon 1 year ago.

We have gone out for tender with the following suppliers:

Planet Fm:	Did not linked with Agresso.
Agresso:	The new upgrade took too long and it is more a finance system
Planon:	Interface with Agresso, bit more expensive, we already got a space management system from Planon.
Elf:	No off the shelf package and no purchase order.

Finally, we choose Planon because Planon were the only other company to have already interfaced with Agresso, space module already integrated, future development opportunities and used by a number of other Universities and are growing their market share with continuous development

8) How do you take care of customer satisfaction?

Apart from annual staff survey & suitability survey currently this is ad-hoc & reactive, only respond to customer complaints, do not seek feedback. This is an area we want to look at in the future but have not started to investigate yet. One possible method would be to include a short survey on the web self service system on completion of a job or Random selection of customers

9) What happens with a query when it comes in at the Service Desk?

n/a

10) How does a query get solved?

n/a

11) Which procedures are written down?

Not many, it is part of my remit to process map procedures with a view to improving efficiencies etc and it takes time.

12) Are there standard times by which a query has to be answered?

We work with different priorities:
Priority (Radio): Emergency – immediate response
Priority 1: Same Day
Priority 2: 3 working days
Priority 3: 15 working days
Priority: Projects

13) How are response times monitored?

The Planon system knows when a job is completed & knows what the SLA was so can calculate and report on response times, however, we are not doing very well at the moment. We are currently looking at KPI'S & management information. By the end of the year we will have a draft management report with initial KPI'S & will be developed over time

14) Are there any systems in place to monitor the quality of the service?

Currently not, this is an area we would like to implement – resource permitting

15) How does the current Service Desk function within the organisation?

It works ok, but we can still improve our service.

16) What are the benefits of a facility Service Desk for you? Are there any disadvantages?

Benefits are single point of contact and a central administration of system. Disadvantages are occasional silly request/time wasting and obviously there is a cost associated with staffing the desk

Implementation

17) How and when was the Service Desk implemented?

We already have a Service Desk for a long time. The implementation of Planon started in June 2009 and implemented the software system December 2009. Therefore, within 6 months we implemented a new software system.

18) How was this communicated during and after implementing the Service Desk and with whom?

There were some communications included in the department newsletter about the change of system. To the customer there was no real change. However, we have received complaints that people do not know whom to contact & we are planning a "campaign" to increase awareness

19) Which people were involved in implementing the Service Desk?

Implementation of the Service Desk is a long time ago, but with the implementation of Planon the following people were involved. We had a project team. IT had no hands on role in this project. They only gave us an advice and helped where needed. The project teams included me (resource manager), Estates manager, Maintenance officer, Maintenance coordinator and the Network & server Services Manager.

20) What were the costs of implementing the Service Desk?

Round 90 000 pounds

21) Which steps were followed before the employees got to work behind the Service Desk?

They had Planon training, so they knew how to use the system.

22) What problems have you encountered when implementing the Service Desk?

The following points went wrong with the implementation of Planon:

Time scale & planning for implementation

- Too ambitious for such a major project
- Did not allow enough time for training & testing
- Too many of the decisions were made by the Project manager & not by the users
- December not ideal to launch

Project Team

- Lack of experience within project team
- Roles not clearly defined within the team
- No deputy, too much reliance on Project Manager

System Knowledge

- Not enough knowledge sharing of the system at an early stage
- Other Universities have experienced the same issues
- Timescales set by Planon too ambitious
- Resource required to set system up underestimated
- Sales pitch was "slicker" than actual product
- "Blank piece of Paper" approach to systems design
- ALL other Universities at the conference had a dedicated systems manager with IT background

- Birmingham had a team of four working on implementation full time

23) Have you done an evaluation and were the results matching with the expectations of the customers? If so, what was the result?

n/a

24) Do you further have any suggestions or comments that apply to this research?

Define your processes first – do not try to use the system to define your processes (they are different). Ensure you have a strong project team: need a sponsor of the project at a senior level, need a strong project manager, need a strong dedicated IT person, set up a steering group at high level to drive the objectives/aims, involve the users from an early stage, keep it simple to start with & develop with time, keep it realistic and make sure you have the resource to operate it

7.5 Sheffield University

Name: Barry Whittles and Jodie Havenhand,
Function: Head of Engineering Operations and Planon Systems Administrator

The estates and facilities departments were separate departments, but have recently merged under a new Director. The University of Sheffield is twice the size of the University of Leicester and receives 25,000 reactive maintenance calls a year, the maintenance Help Line is covered by four people, although we did not see this in operation.
Sheffield employ 60 craftsman divided into a small works team, a pre-planned maintenance team and a reactive maintenance team. Reactive maintenance requests are completed on a standard three-day turnaround time. Jobs completed by internal craftsmen and by contractors are not differentiated e.g. reactive plumbing works are often done by a contractor, the University plumbers work for the small works and planned maintenance teams. The University maintains 450 buildings.

Planon at Sheffield
The University of Sheffield uses Planon as the registration system for their maintenance requests and plan to develop it to include facilities requests in the new merged department. They introduced Planon in 2004. When Planon upgraded recently they invited demonstrations from other CAFM providers including Concept and Piranha. After the demonstration, Planon was still the provider of choice although it was admitted that this was due in part to the existing investment.
To maintain and upgrade the system they have a professional Systems Administrator (Jodie).

The modules the University of Sheffield uses are:

- Service Desk
- Work Orders
- Budget
- Asset Manager
- Contract Manager
- Address Management (personnel and contractors)
- Facility Net (Self Service)
- Management Dashboard

The system holds fields on building names and room names/numbers and these are automatically updated when MICAD is updated. The system does not hold any drawings or any other room data; if Sheffield were to want to hold this type of data in Planon they would need to buy the Space Management Module.

When a request is logged, a work order group is created to be linked with the SAP Purchasing module so that purchase orders can be raised in SAP.

Logged requests on Planon have six statuses; each time a status is changed the requestor receives an email to inform them of the change in status.

- Reported
- Accepted
- Purchase Order Produced and Sent (this is equivalent to our – assigned status)

- Technically completed
- Administratively completed
- Cancelled

The Planon system differs from the University SAP system in that each task has to be selected from a menu system e.g. Building works→ interiors →doors → door will not close – there is a comment field to add more text. There is a front panel and then dropdown menus although the system does operate an auto fill from key words.

Planon is a configurable system and if implemented at Leicester the job types would need to be selected and agreed – i.e. although there are standard tasks for maintenance, PACS etc. a considerable amount of staff and consultant time would be required to put this in as a new system. Barry said the employment of a full-time professional systems administrator, Jodie, had been necessary to save a considerable amount of money in consultancy/development costs as well as offering greater flexibility.

Planon is able to generate a job with sub jobs – e.g. job X could have sub-jobs X1, X2, X3 etc an example might be a leak from pipes behind skirting; X1 plumber removes skirting and mends leak; X2 joiner replaces skirting; X3 painter paints skirting and surrounding wall. Sub-jobs can be closed but the main job will remain open, the requestor can check the status of the job, which will show sub-jobs have been done and which have still to be completed.

Facility Net

The Facility net is web based; Sheffield have chosen to password protect theirs and only five of their University customers use it, the others prefer to continue to ring the Help Desk or email rather than learn a new screen. NB this is similar to the experience at Leicester. These users can view the status of any jobs they requested and also of all jobs requested by their department; NB this is how Sheffield have chosen to configure the system it would be possible for users to view all jobs in a building.

Most contractors use the service; when they login, they see a graphic picture of a meter showing the percentage of their jobs completed within their given KPIs. NB the Estates staff can also see these percentages. There is also a metre for the percentage of outstanding invoices on closed jobs.

HE User Group

There is an HE User Group for Planon which is extremely useful for sharing experiences and scripts.

Implementation

Barry and Jodie strongly advised that there be a User Group for the implementation of the software. In the first phase, the Group should meet weekly, reducing to bi-monthly and then monthly once the implementation was completed. They also advised to implement the system for one service at a time; i.e. make sure that maintenance works before you move on to PACS. NB Planon offers a full test environment.

Ideas

- **Contractor access and dialog**

- The contractors can log in via the web – they can see full details of all of their own jobs, which are not yet administratively complete.
- They have a performance monitoring tool which they and the University Estates department can see.
- When a contractor is selected as the provider on Planon an email of all the details of the job are automatically sent to them
- If a job is for the maintenance contractor for a particular service the email is automatically sent as soon as the job type is entered e.g. lift repair, air conditioning breakdown.

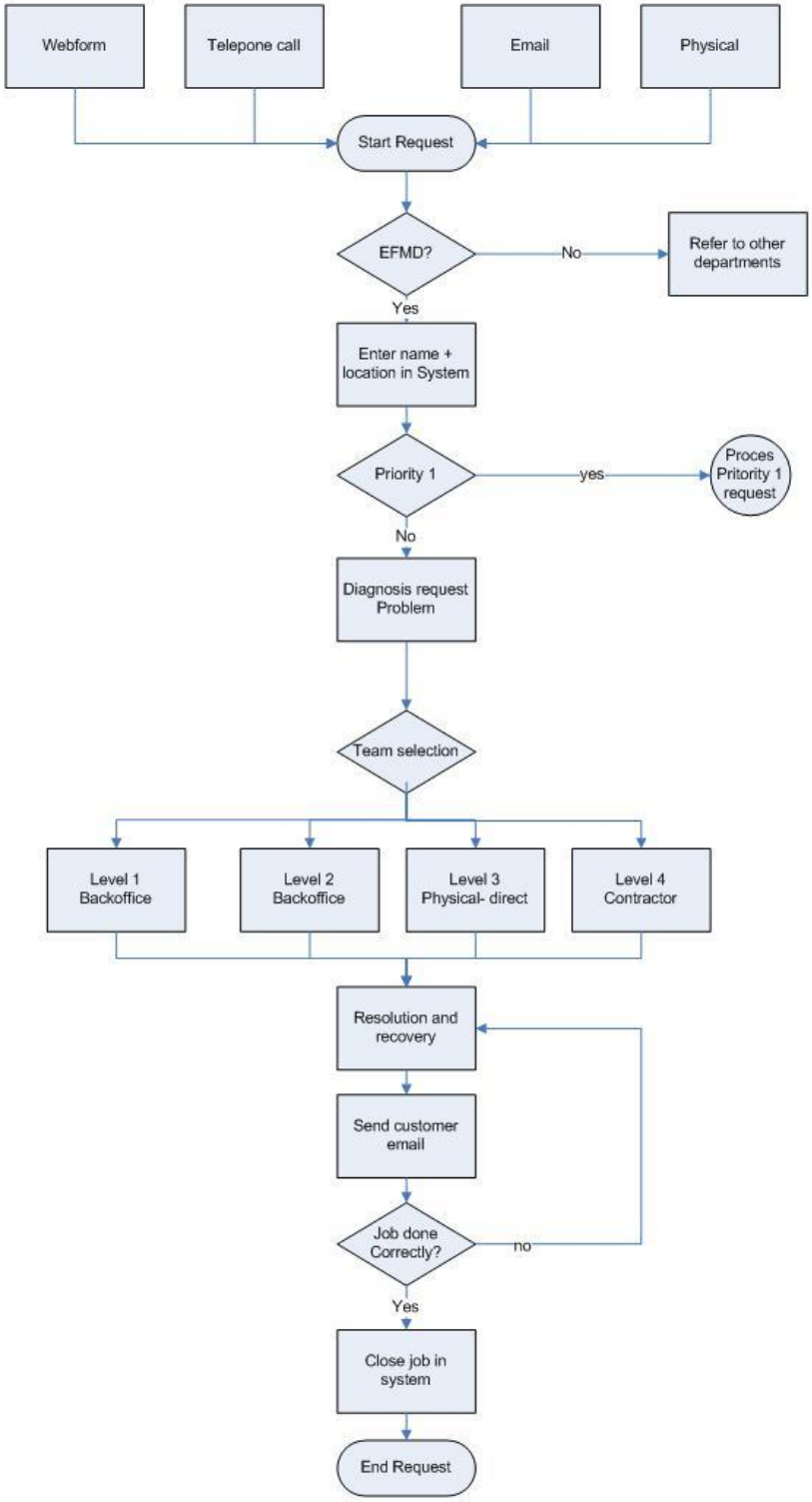
- **Link with MCIAD** Sheffield have not invested in the Space Management module of Planon but they do have a one-way integration with MICAD whereby the building and room information fields are updated every time these fields are updated in MICAD.
- **Use of Notebooks** NB Sheffield has a wireless network which extends to most of their plant rooms
  - Sheffield has piloted using notebook pc for their small works teams (retailing at £200 each) – the results have been striking in that they can now account for 85% of an individual's time rather than the previous 25%.
  - The craftsmen have been given a simple interface that allows them to view and close their own jobs
  - The craftsmen can also use MICAD to check CAD drawings and asbestos registers.
  - The craftsmen log in to the University intranet using the wireless network so the devices require no programming or configuration
  - The devices are robust and will not become obsolete. Sheffield mentioned that the University of Oxford had been working with Planon for three years to implement PDAs and that they were still not happy with the results and the hardware they had started with was now out of date.
- **Use of Split Screen –** the split screen where the help desk staff can view open jobs in an area as well as the request screen is particularly useful in avoiding duplicate entries.

Appendix 8. Overview external gathered information

Parts	Erasmus University	Technical University Delft	University of Nottingham	Aston University of Birmingham	Sheffield University
Practical					
Name	EFB Servicedesk	Servicepunt	Help desk	Help Desk	Help Desk
Exist since	2008	2006	1999	2000	Before 2002
Customers	2500 staff 20,400 students	4690 staff 16,000 students	6000 staff 30,457 students	1,200 staff 8,500 Students	6,000 staff 24,000 students
FTE Facility Department	80 (Some services are outsourced)	200	500	n/a	60 main office 60 maintenance
FTE Front office	4 desks /4 people	3 FTE on each service punt	2 + 3 backup staff	1FTE + 2 extra cover	4
Ambitions					
Mission/Aim	EFB Servicedesk is the contact point for all questions or requests/reservations of our facility services.	The Service Desk is the primary point of contact for students, staff members and visitors.	n/a	n/a	Ensure that all requests are dealt with within a specific timescale, prioritised according to their urgency, and that Departments are kept informed of progress on these requests.
Objectives	Working demand driven and good communication.	We will respond to all complaints, requests, information requests and malfunctions, known as KWIS, within half a working day.	n/a	n/a	n/a
Service					
Front Office represents teams	- Facility Management department - Reception services	- ICT - FMRE - E & SA	Estates and Facility management department	Estates and Facility management department	Estates and Facility management department
Software	Planon	Infra Enterprise	Concept	Planon	Planon
Reporting	CAFM transferred to Excel	n/a	Automatic by CAFM	Automatic by CAFM	Automatic by Planon and Dashboard
Coordination	- 90% of the processes written down	- 80% of processes are written down	Very few, priority of the requests and extension	Not many	

	- Service Desk Manual	- Service point Manual	date on job		
Customer Satisfaction	- Enough communication - Give plain expectations - Customer satisfaction survey - With special events more contact	- Interview important customers - Product and services catalogue - Mystery Guest - Call 3 customers a week	- KPI - Automatic emails	Annual staff survey & suitability survey	n/a
Services covered	All facility services	All supporting services	Maintenance in particular but also other Estates and Facilities services	Maintenance in particular but also other Estates and Facilities services	Maintenance in particular, but also other Estates and Facilities services.
Design					
Organisation	Cluster model, 4 service points	Cluster model, 9 service points	Account management Model	Information Centrum Model	Account management Model
Construction					
Physical location	In all the Main buildings	In all the Main buildings	Reception desk in Estates Office	No physical location, Estates Office	No physical location
Way to contact	- Phone - Physical desk - E-Mail - Web form	- Phone - Physical desk - E-Mail - Web form	- Phone - Physical desk - E-Mail - Web form	- Phone - E-mail - Web form (wasn't online yet)	- Phone - Email - Facility Net
Opening times	08:00a.m. – 6:00p.m.	8.00a.m. – 5:00p.m.	8:00a.m. – 5:00p.m.	8:00a.m. – 5:00p.m.	8.30 a.m. – 5.00p.m.
Service Desk Jobs	- Service Desk Manager - Service Desk employee	- 4 Service point Coordinators - Service Desk employee	- Administration & Business Systems Manager - Helpdesk staff	- Resource manager - Helpdesk staff	- Helpdesk staff - System Administrator

Appendix 9. Process of a Request



Appendix 10. Overview of ideal situation

Description		
Name	Service Desk	
FTE Front office staff	2.8	
Implementation	Before January 2012	
Ambitions and tasks		
Mission	The Service Desk is a one stop shop that will deliver a more effective and cost efficient service to the customers and provide up to date management information to the service providers	
Objectives	**1.** Integrated, rapid response, customer focused service **2.** Integrated process-orientated approach **3.** Providing comprehensive, timely and accurate management information **4.** Effective service delivery, 'right at first time' **5.** Improved image for the EFMD	
Adapt services between Service Desk and Back Office		
Service Desk represents teams	Cleaning and Portering Security Horticulture Maintenance Environmental	Environmental Development Maintenance Interior Solution
Software	Off the shelf Computer Aided Facilities Management (CAFM)	
Reporting	Automatic by CAFM	
Coordination	**Procedures and working methods** • Agree content of products and services • Define jobs Service Desk and Back Office • Way to work in work flows **Cooperation** Regular meetings between Back Office and Service Desk	
Research customer needs	Regular	
Products and Services Catalogue	Digital on Estates website	
Design		
Organisation	**Phase 1:** Mix of Account management and Information centre model **Phase 2:** Account management model	
Construction		
Physical location	Desk function	
Software modules	• Request reporting • Work Planning • Management information reporting	
Way to contact	- Web form - by telephone - E-mail - Physical desk	
Opening times	8:00 -17:30	
Jobs	- Service Desk Manager - Senior- and Junior Service Desk employee	

Appendix 11. Overview of Costs systems

Software	Helpdesk	Report	Self Service	License costs	Extra	Total £	Annual Support Fee	Comments
SAP	x	x	x	x	x	x	x	No information available. If SAP would be chosen, IT services have to give an cost indication.
Planon	x	x	x	£ 57,397	x	£ 57,397	20% of license costs	This includes more modules then just helpdesk and report and self-service.
QFM (SWG)	x	x	£ 5,000	£ 21,000	x	£ 26,000	£5,250	
Ultrasys	x	x	x	£ 24,500	x	£ 24,500	£4900 for 10 licences	
Integrated FM	£ 5,250	£ 4,250	£ 5,250	£ 7,000	x	£ 21,750	20% of license costs	
Planet FM (Qube)	£ 4,400	x	£ 5,000	£ 9,500	x	£ 18,900	£6,630	
Archibus (MASS PLC)	£ 2,959	£ 5,900	£ 4,625	£ 5,300	x	£ 18,784	£4,696	
Concept (FSI)	£ 1,995	x	£ 3,495	£ 8,950	£ 3,750	£ 18,190	£2,500	Self service has 10 users licenses
TopDesk	£ 3,000	£ 3,000	£ 1,000	x	£ 6,000	£ 13,000	15% of license fee	
FM Easy (Serco)	x	x	x	£ 9,995	x	£ 9,995	20% of license costs	
Tabs FM	£ 2,937	x	£ 2,937	£ 3,500	x	£ 9,374	no information	
CAFM Explore	x	x	x	£ 6,000	x	£ 6,000	£5,000 (10 updates)	This includes other modules; this system has to be bought as a package.

Appendix 12. Sheet Grading Pointing System

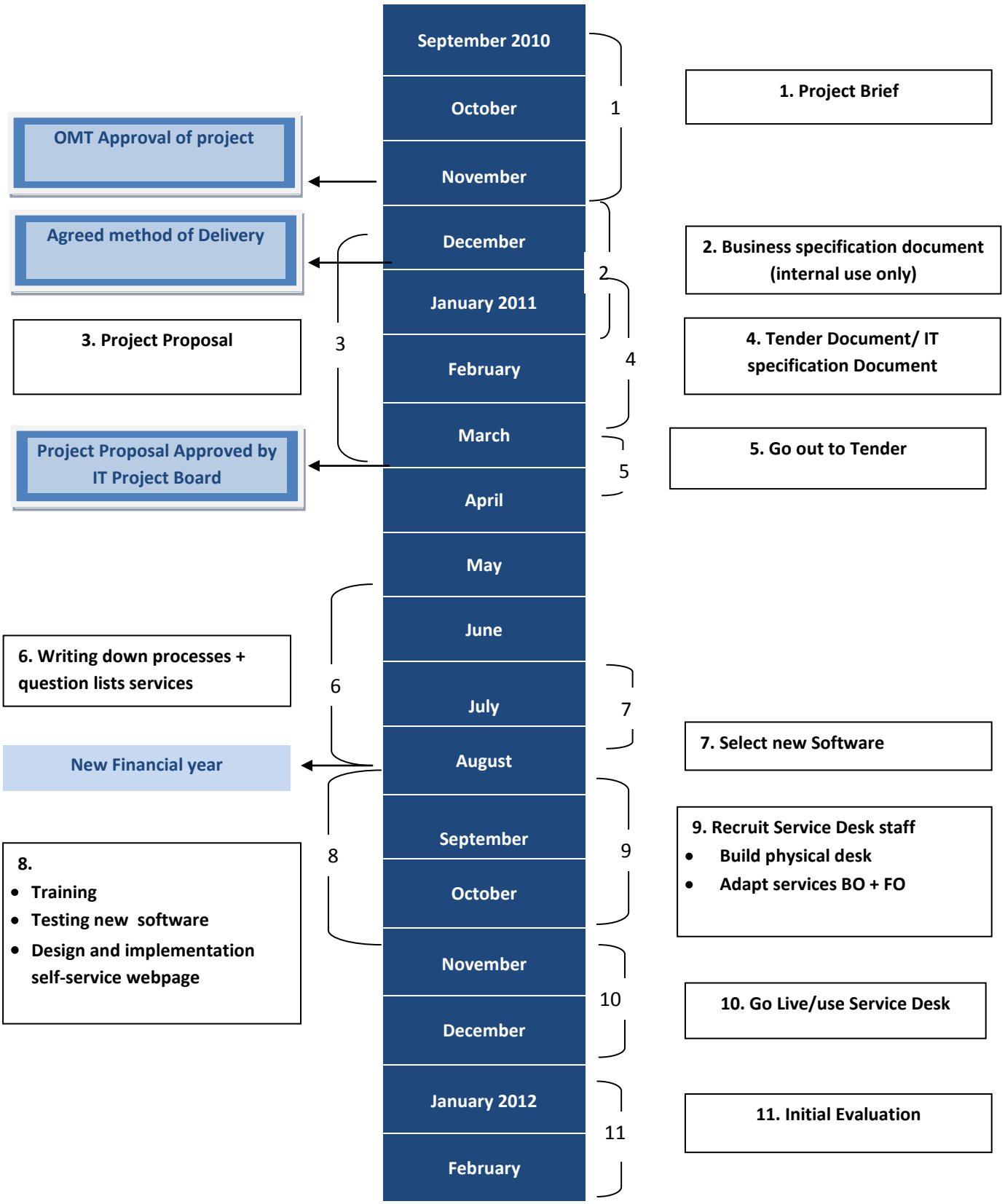
Software	SAP Experience	MICAD	Browser Based	Specialised in FM systems	Other Universities	Helpdesk	Graphical User Interface	Self Service	Reports	PDA's	Planned Preventive Maintenance
Planon	50	50	30	10	10	15	20	20	15	15	10
Planet FM (Qube)	50	50	30	10	10	15	10	10	5	15	10
MASS PLC (Archibus)	50	50	30	10	10	10	15	10	15	10	10
QFM (SWG)	50	50	30	10	10	10	10	10	10	15	10
Concept (FSI)	50	0	30	10	10	15	10	15	10	15	10
Integrated FM	25	25	0	10	10	10	10	20	15	20	10
SAP	50	?	30	0	10	10	10	10	10	10	10
CAFM Explore	50	0	0	10	10	10	15	10	20	15	10
Tabs FM	0	0	30	10	0	15	15	10	15	20	10
FM Easy (Serco)	50	0	30	0	10	15	5	5	10	10	10
Ultrasys	0	0	30	10	0	10	10	15	10	10	10
TopDesk	0	0	30	10	0	15	10	15	10	0	10

Max points	50	50	30	10	10	20	20	20	20	20	10
Yes	50	50	30	10	10	x	x	x	x	x	10
No	0	0	0	0	0	x	x	x	x	x	0
Poor	x	x	x	x	x	0	0	0	0	0	x
Fair	x	x	x	x	x	5	5	5	5	5	x
Average	x	x	x	x	x	10	10	10	10	10	x
Good	x	x	x	x	x	15	15	15	15	15	x
Very Good	x	x	x	x	x	20	20	20	20	20	x

Software	Space Planning	Stock Control	Tasks Allocation	Contract Management	Asset Management	Total
Planon	5	0	10	5	10	275
Planet FM (Qube)	0	5	10	5	10	245
MASS PLC (Archibus)	5	0	0	5	10	240
QFM (SWG)	0	5	0	0	10	230
Concept (FSI)	5	5	10	5	10	210
Integrated FM	0	5	10	5	10	185
SAP	0	5	10	5	10	180
CAFM Explore	0	0	0	0	10	160
Tabs FM	5	5	10	5	10	160
FM Easy (Serco)	0	0	0	0	10	155
Ultrasys	0	5	10	5	10	135
TopDesk	5	5	0	5	0	115

Max points	5	5	10	5	10	295
Yes	5	5	10	5	10	X
No	0	0	0	0	0	X
Poor	x	x	x	x	x	X
Fair	x	x	x	x	x	X
Average	x	x	x	x	x	X
Good	x	x	x	x	x	X
Very Good	x	x	x	x	x	X

Appendix 13. Implementation Planning



Attachments

1. Project Brief

2. Overview of Software Suppliers