Play Ball! Using Technology and Language to Build a Team

Marty Chobot
FM:Systems

Myra Agee
Vanderbilt University Medical Center
Enterprise Software -
Two Types of Users

» **Power User**
  - Uses the system as part of their primary function for the organization
  - Helps them do their job better, faster, cheaper

» **Casual User**
  - Uses the system as a support tool
  - Helps them get back to their main job more quickly
Easy to use!? Not for me...
Usability – Key Takeaway

» “Easy to use” for power users isn’t typically appropriate for casual users

» “Easy to use” for casual users isn’t typically appropriate for power users
Departmental vs. Enterprise Facility Software

» Both valuable and important toolsets

» Step 1: Fundamentals - Get your data, processes and technology in shape

» Step 2: Build on Success - Expose the system to internal customers, management and facility partners
Enterprise Architecture
Why implement enterprise software?

» Improve visibility, communication and collaboration
  - Fewer dropped balls
  - More accurate information

» Bottom line results
  - Move cost savings of 83%
  - Customer service of 97%
  - Facilities productivity increase of 60%
Seven steps to get casual users to use your system

1. The golden rule
2. Listen to them
3. Talk (Market) to them
4. Keep it simple
5. Keep them in the loop
6. Guide them through processes AND then get out of their way
7. Listen to them some more
1. The golden rule 
(of technology)

» Automate unto others as you would have them automate unto you

» Projects fail because people don’t:
  - Create value for the casual user
  - Communicate the value to them
2. Listen to them

» Understand their needs
  - One-on-one meetings with key stakeholders
  - Focus groups
  - Surveys

» Build their needs into your implementation
3. Talk (Market) to them

» Document and communicate the value
  - To them
  - To you
  - To the institution

» Don’t assume they know why the project is important

Dear Joe Customer,
Automating facility service requests will benefit you, the facilities department and our entire institution.

It will help you:
1. Get faster service with fewer errors
2. Know the status of your requests with instant access to service information

It will help facilities:
1. Reduce costs and streamline processes
2. Better track supplier performance

It will help our institution:
1. Save $300k a year by avoiding errors and miscommunications
2. Improve quality and safety on campus
4. Keep it simple

» Ask yourself - is this easier to use than the phone? Than e-mail?

» If not, they’ll call you or shoot you a note.

» Ways to share information
  - Forms
  - Views of data
  - Reports

Dear John,

Wanted to make sure you got my page and my voicemail a few minutes ago – my office is very cold. Can someone take a look as soon as possible???

Thank you,
Joe Customer
4. Keep it simple - create customer liaisons

» Direct Communication with Customer Groups
4. Keep it simple – create customer liaisons

» Liaisons for Customer Groups
4. Keep it simple - illustration

» Internal customer form

» Liaison form

Move Request Form

Employee to Move
Employee Phone
Employee Email
Requested Move Date
From Room
To Room
Department
Reason for Move
Move Type
PC Move
Boxes Required
Add to Move Project?

Submit Cancel
4. Keep it simple

» What if a process can't be that simplified?

- Give them opportunities to stop and come back to the task
- Remember, this isn't their primary job and (surprise) if an issue comes up on their primary job, they're going to stop using your software and take care of business
5. Keep them in the loop

Notifications

- let them know when things change
- beware ONS (over-notification syndrome)
5. Keep them in the loop

» **Notifications**
  - let them know when things change
  - beware ONS (over-notification syndrome)

» **Online status updates**
  - Facilities Portal
  - Calendars
  - Floor plans
5. Keep them in the loop

» **Notifications**
  - let them know when things change
  - beware ONS (over-notification syndrome)

» **Online status updates**
  - Facilities Portal
  - Calendars
  - Floor plans
5. Keep them in the loop

» **Notifications**
  - let them know when things change
  - beware ONS (over-notification syndrome)

» **Online status updates**
  - Facilities Portal
  - Calendars
  - Floor plans
6. Guide them

» Power users need more options and fewer clicks

» Casual users need fewer options, more clicks with guidance

» Wizards
  - Power users typically hate wizards
  - Give me a long list of things that I can hammer out because I know what needs to go where
  - Stay outta my way - I'm fast!

» Context sensitive help
7. Listen some more

» Get feedback as you go
- Track adoption
- Monitor usage
- Keep listening and improving
Play Ball!

Using Technology & Language to Build a Team

Vanderbilt University Medical Center
Office of Space & Facilities Planning
Vanderbilt University
Nashville, Tennessee
2007 NATIONAL CHAMPIONS
VANDERBILT WOMEN'S BOWLING

Athletics
1925: Medical Center
1980: The "New" Hospital
2007: Medical Center
2007: Still Growing
Space Management Team

- Cyril Stewart, VUMC Facilities Planning Director
- Myra Agee, Space Management Coordinator - Space
- Dwight Woodard, Network Manager - Tech Support & AutoCAD
- David McElhanon, Architectural Drafter - AutoCAD
For the next few minutes . . .
Confused???
Bewildered???
Overwhelmed???
Unsure???
Dazed???
Disinterested???
Apathetic???
Unmotivated???
Tools to Play

vs.

Language of the Game
Vanderbilt University Medical Center
Office of Space & Facilities Planning
Space Inventory

1. Goal
2. Why
3. Strategy
4. How
5. Results
Space Inventory Milestones:

- 1984 Mainframe
- 1994 FM:Systems
- 2000 Online
- 2007 310 Contacts 3.5 Million NSF

Buildings Inventoried
Game Plan:
Teaming together for a win-win outcome

Space Team Requirements:
- Check & balance of data
- Direct email link
- Accurate data

Casual Users’ Wish List:
- Easy Form
- Online info & help
- Floor Plan
- Pick & Click
- Printable report
You are Invited

- Email Notification
- Date, Time & Location
- Due Date
- Website Address
- ID and Password
- Drop in Dates
- Email Address
Vanderbilt University Medical Center
Facilities Management
Space Survey

SURVEY FORM STATUS: OPEN
Due Date: May 14, 2007
Review Known System Issues Now!

1. Click here to install the drawing viewer plug-in
2. Click here to install the training video plug-in
3. Firefox Users need the JETab extension

Survey ID: 0112
Password: ********
Initials: mna

Submit

No ID and/or Password yet? Contact the Space Team
<table>
<thead>
<tr>
<th>Building</th>
<th>Room Number</th>
<th>Room Type</th>
<th>Area</th>
<th>Last Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>Crystal Terrace</td>
<td>C 200</td>
<td>360_Intra-Dept Corridor</td>
<td>265</td>
<td>7/16/2007 mna</td>
</tr>
<tr>
<td>Crystal Terrace</td>
<td>C 200A</td>
<td>310_Office</td>
<td>132</td>
<td>7/16/2007 mna</td>
</tr>
<tr>
<td>Crystal Terrace</td>
<td>C 200B</td>
<td>360_Intra-Dept Corridor</td>
<td>81</td>
<td>7/16/2007 mna</td>
</tr>
</tbody>
</table>

Click on the room number in the upper right to select.

If an existing room is not present or other general survey conditions need reporting, please contact the Space Survey Team (mcspacesurvey@vanderbilt.edu)
6 Help Links

Help Links for Problems

VUMC Survey Help and Reference Guide

Using the Drawing Viewer
Room Use Definitions
Functional Classification Definitions
System Requirements
Contact Persons
Online Training Presentation

* Status of Known Issues *
> Report an Issue <
### Help Link #2: Room Use Definitions

Summary of room types from the Postsecondary Education Facilities Inventory and Classification Manual

<table>
<thead>
<tr>
<th>Categories</th>
<th>Room Use Title</th>
<th>Definition</th>
<th>Description (includes)</th>
<th>Limitations (excludes)</th>
</tr>
</thead>
</table>
| Classroom Facilities| 110 - Classroom| A room used for classes and that is also not tied to a specific subject or discipline by equipment in the room or the configuration of the room. | 1. Lecture rooms  
2. Lecture/demonstrations rooms  
3. Seminar rooms  
2. Meeting rooms  
3. Auditoriums  
4. Class laboratories |
| Classroom Facilities| 115 - Class Svc | A room that directly serves one or more classrooms as an extension of the activities of that room. | 1. Projection rooms  
2. Cloakrooms  
3. Preparation rooms  
4. Closets  
5. Storage – only if it directly serves the classroom | 1. Projection rooms  
2. Cloakrooms  
3. Preparation rooms  
4. Closets  
5. Storage – IF they serve conference rooms, meeting rooms, auditoriums or class labs |
| Laboratory Facilities| 210 - Class Laboratory |                                                                 | 1. Teaching labs  
2. Lecture/demonstrations | 1. Classrooms  
2. Externally scheduled or

# Functional Use Reference Tables

**TABLE OF CONTENTS**

- Functional Use Definitions
  - Hospital
  - Clinic
  - Research
  - Instruction
  - Other Sponsored Project
  - Departmental Administration
  - Library
  - Service Centers
  - Operations and Maintenance
  - Sponsored Projects Administration
  - Student Services
  - General Administration
  - Other Institutional Activities

<table>
<thead>
<tr>
<th>Table 1: Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classifying Research Space</td>
</tr>
<tr>
<td>Classifying Instruction Space</td>
</tr>
<tr>
<td>Classifying Other Sponsored Projects Space</td>
</tr>
<tr>
<td>Classifying Departmental Administration Space</td>
</tr>
<tr>
<td>Classifying Other Functions</td>
</tr>
</tbody>
</table>

**Help Link #3:** Functional Usage Definitions & Table of Examples
Radio Button: Populates Room Data

Drop Box Allows Click & Add of Employee Names

Floor Plan
Floor Plan:

Options: Pan, Zoom, Fit to Window, Zoom Rectangle & Zoom to Room.

Also provides NSF of department.
Help: Step by Step Instructions for each section

Help: Pick, Click & Add

To Add an Center:
- 4.1 Enter at least the first 4 digits of the 10-digit Center Number
- 4.2 Click ‘Retrieve Center’ and Wait for the Center List to be populated
- 4.3 Then Select the Center and Click ‘Add’. (You may select as many as you wish
- 4.4 To remove a Center, select the Existing Center & the far right ‘Remove’ button

Center: 1045
Retrieve Center

1045000040_18_DEV - DISCRETIONARY FD
1045000050_18_INGRAM CHAIR
104500500_18_RCE ALLOCATION
1045004101_18_RESEARCH REWARD 2000

5. Compile a list of persons who call this their PRIMARY Workspace. Click here for Video Help on this Step
To Add an Occupant,
- 5.1 Enter a person's last name (or the initial part of it)
- 5.2 Click ‘Retrieve Occupant List’ and wait for the occupant list to be populated
- 5.3 Then select the name and click 'Add' in the occupant box that best describes the individual
- 5.4 To remove an occupant, select the existing person from the far right list. Then click 'Remove'.
- 5.5 If a visiting professor has access to this room, check this box

Funded
### Help: Employee List – Pick, Click & Add

**Help Link:** Video Assistance for Each Section

#### Notes on Using the Employee List
1. **Clear the Room Number:**
   - Click in the room number field to clear the number.

2. **Select the Room:**
   - Click in the room number field to select a room.

3. **Add or Remove Occupants:**
   - Use the "Add>>" button to add occupants to the list.
   - Use the "<<Remove" button to remove occupants from the list.

4. **Occupancy Calculation:**
   - The system automatically calculates the number of occupants based on the selected rooms.

5. **Review and Submit:**
   - Review the list of occupants and submit the survey once all necessary information is entered.

---

#### Table: Employee List

<table>
<thead>
<tr>
<th>Building</th>
<th>Room Number</th>
<th>Room Type</th>
<th>Area</th>
<th>Last Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>Crystal Terrace</td>
<td>200</td>
<td>360_Intra-Dept Corr</td>
<td>265</td>
<td>8/28/2006 mna</td>
</tr>
<tr>
<td>Crystal Terrace</td>
<td>200A</td>
<td>310_Office</td>
<td></td>
<td>5/1/2007 drw</td>
</tr>
<tr>
<td>Crystal Terrace</td>
<td>200B</td>
<td>360_Intra-Dent Corr</td>
<td>8</td>
<td>8/28/2006 mna</td>
</tr>
</tbody>
</table>

---

**Submit Survey**

**Exit Survey**

---

**Definitions/help**

**Printable Survey Data**

**Contact Space Survey Team**

---

Click here for Video Help on this Step

---

Click here for Video Help on this Step

---

Click here for Video Help on this Step
Help: Comments Box – personal blog for each room.
• To exit the current survey session (you can come back to continue the work), click "Exit Survey".

• To get detailed printable survey data, click "Printable Survey Data".

• To close and submit the survey, please complete the following steps in order:
  1. Survey Data Validation: This checks the survey and reports errors that must be corrected before submitting or continuing step 2.
  2. Submit Survey: This submits the previously validated data. Users will continue to have read-only access to survey data after submitting, but will not be able to edit data.
Survey Data Error Checking

Crystal Terrace-200
Space Used%: 0

Crystal Terrace-200B
Space Used%: 0

Help: Errors Listed
<table>
<thead>
<tr>
<th>Building Room</th>
<th>Room Type</th>
<th>Area</th>
<th>Contact</th>
<th>Assignee</th>
<th>Space Used%</th>
<th>Activity%</th>
<th>Comments</th>
<th>Last Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>Crystal Terrace - 200</td>
<td>Dept Corr</td>
<td>305</td>
<td>Martin, Diana H (x) 332-662</td>
<td>DeWeese, Fred E</td>
<td>100%</td>
<td>100%</td>
<td></td>
<td>8/28/2006</td>
</tr>
<tr>
<td>Crystal Terrace - 200A</td>
<td></td>
<td>132</td>
<td>Martin, Diana H (x) 262-792</td>
<td>DeWeese, Fred E</td>
<td>100%</td>
<td>Office Conference</td>
<td></td>
<td>8/7/2006</td>
</tr>
<tr>
<td>Crystal Terrace - 200B</td>
<td></td>
<td>81</td>
<td>Martin, Diana H (x) 262-792</td>
<td>DeWeese, Fred E</td>
<td>100%</td>
<td>Other Institutional Activities</td>
<td></td>
<td>8/28/2006</td>
</tr>
</tbody>
</table>

Help: Hard Copy Report

Help: Hard Copy Report Options
Survey Data Error Checking

No incomplete and/or questionable data are found in this survey.
Survey Data Error Checking

No incomplete and/or questionable data are found in this survey.

Submit Survey

Help: Final Step
Learning the language of the game . . . It pays off
Historical information
and
building photographs
are the courtesy of the
Vanderbilt University website:
www.vanderbilt.edu