

GETTING RID OF THE SIGNING-IN BOOK

IN **5** STEPS

How to transform
Visitor Management from
a process into a journey



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Introduction

The 21st Century... In the mid-1950s and through the 60s, 70s and 80s, we marveled at the possibilities ahead. However, by the 1990s when it comes to changing the human condition, we had pretty much realized: Well maybe not!

But the advent of a shiny new age of technology? Yes, that seemed inevitable. That is the continuing march of progress that has been with us since humanity harnessed fire and made bone tools. Technology would reduce monotony, make communication faster and increase the efficiency of business. It would make life easier and enable richer experiences.



And here we are today.

Business processes have been revolutionized. If the first wave of digitization was about crunching numbers, then the second has been about eliminating laborious manual processes with automation. Now, midway through the second decade of this century, the ongoing process of evolution means the current wave is about refinement, designing business technology to enhance the user experience (UX) wherever possible.

A key point of focus for poor visitor experiences is the signing-in or log book. It follows that getting rid of the signing-in book provides the opportunity to improve visitor experiences. **In this guide we'll look at how technology transforms the experience of visiting your business from a process that produces highly variable results into a smooth journey that makes a positive and lasting impression on your guests.**

The conventional approach

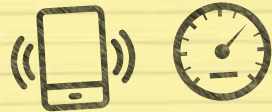
Whether as a visitor or a host, being a guest or receiving them is a shared experience to which most of us are able to relate. Many have been on both sides of the 'equation' and should recognize this scenario:

Steven Jones is on his way to the meeting, he forgot the exact address so he checks Google or calls his office.

I'm on my way...



...but I'm late



Steven is late, he can't find the number of his host. Again he calls his office to ask they phone ahead that he is late. He asks the taxi to speed up...

Made it, but...



Already 15 minutes late, Steven rushes into lobby to find people standing in line at reception.

...and oops!



Steven forgot the name of the person he is visiting. He opens his bag... takes out his laptop... waits for it to wake... opens his very slow email client and... Got it... Sarah Specter.

Slowed up by the process



He writes details in the signing-in book: first and last name, company name, license plate, hostname...

Ah-ha!



Well... well.... well... what have we here? Steven can't help noticing some of his competitors have signed-in to visit Sarah over the past 2 days!!

Another oops!



Steven does not see the building safety notice about emergencies lying next to the signing-in book.

**connectivity
required**



Steven asks for the Wi-Fi password as he needs internet connectivity during his presentation and he's given logging on instructions on a photocopied sheet that's so distorted it must be a copy of a copy of a copy...

Human error



Reception prepares a paper badge with Steven's name, only his handwriting is difficult to read and it gets spelled 'Steve Jonas'... Two mistakes in two words, upsetting... But no time to discuss...

Delay accumulates



Steven sits down in the waiting area, he is now 25 minutes late - he is getting very nervous and really wants reception to call Sarah but it's hard to get their attention as they are really busy working through phone calls and the line of visitors.

...as meeting time soaks away



Minutes later there is a moment between incoming calls and visitors, and reception calls Sarah's assistant:
"I have Steve Jonas in reception for Sarah".

At last



Finally the assistant comes down, brings Steven to the meeting room, the meeting takes place, but it's a bit rushed as both have other appointments.

Finally, it's oops again!



On the way out, Steven needs to book a taxi. If only he had thought about it before the meeting. He now needs to book a taxi and wait for it outside. He leaves without checking out, and nobody knows he has left the premises.

Surely, much of this sounds familiar



OK, so we heaped some typical things that might happen together! But you get the picture.

From the perspective of all parties, the signing-in book is a pretty unsatisfactory point of focus for managing visitors.

☹️ For reception

The Reception team is **under pressure to deal with guests quickly and efficiently**. If you have been delayed by your workload when leading a guest through the process, they may say to the host “I got stuck in reception for 20 minutes”.

☹️ For visitors

It is an old fashioned and haphazard process where a good experience cannot be guaranteed for everyone.

Unnecessary waiting resulting from reception being busy can be annoying and cause knock on delays to subsequent appointments.

😡 For hosts

This may reflect poorly on your business and make the wrong impression on visitors. Delays in processing lead to **wasted time and perhaps** missed opportunities as a result of rushed meetings, where presentations and discussions may not be as thorough and detailed as you would like.

Now, look into my eyes... at
a different way to treat your
guests



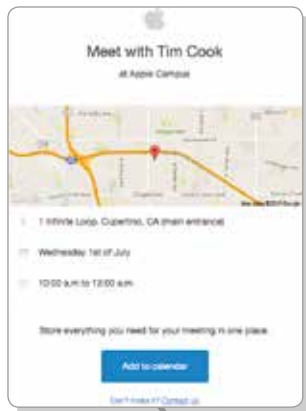
...imagine you dump
the signing-in book.

How could you do it better?

Within the confines of inviting and welcoming visitors to your business premises, it's a blank sheet of paper.

Why not transform the process into a journey?

This is a vision of how it could be:



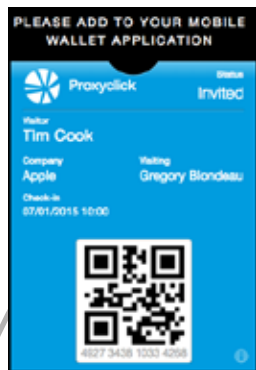
A polished invitation

A few days before the visit, Steven receives a beautiful email with contact details, Google Maps link, parking information and approximate timings on how long to get to the meeting room.



Don't forget

2 hours before the visit, Steven receives a text message reminder with a link to Google Maps and Sarah's email address and phone number.



A QR speeds it up next time

Most impressive of all is the option to save a QR code on his smartphone for a faster check in on his next visit.



Fingertip convenience

If Steven is late he can just tap on his phone to call Sarah's assistant.



This is smooth

He arrives at reception where there is no waiting, and has a nice chat with the receptionist while checking in on one of 3 iPads nicely presented on kiosk stands. It is a memorable brand experience which he remembers he had elsewhere... when visiting this company's San Francisco office.



Smile please!

Wooooow taking your photo on the iPad is just great - it even caught a little of his best side! And when Steven responds he came by taxi, it asks him if he needs one for his return trip, where it is going and what time he wants it.



Confidentiality assured & agreed

Steven cannot see if his competitors have been here before or skip the NDA because it is embedded in the iPad sign-in procedure.



This looks great

A beautiful color badge is printed, with his photo, no spelling mistakes and the all-important Wi-Fi code.

Perfectly in time

A few moments later Sarah's assistant comes down.

Elvis has left the building!

After the meeting, Steven checks out on the iPad and emerges to find his taxi waiting. Sarah's assistant is emailed he has left the premises.



Relax, it's all taken care of

Reception does not need to call ahead. Steven is brought to the waiting area and offered refreshments and his favorite newspaper.



In the meantime

Signing-in on the iPad automatically sends an email/SMS to host or their designated recipient. The host can simply respond by tapping "I'll be there in 5 minutes" on the smartphone.

Transparent communication

The message is sent to reception to update the visitor: "Sarah's assistant will be here in 5 minutes." Reception is freed up, with more time to attend to visitors and be seen as offering hospitality rather than processing people in and out. The reception team is not relegated; it is elevated to a position of front of house like the maître d'hôtel in a fine French restaurant.

1-2-3...

You're back in the room

This vision is not an illusion. This is today's reality of how a well thought out Visitor Management solution is able to transform the process into a journey.

OK, so we jazzed it up a little?

No we didn't! This is the consistent and repeatable visitor experience you provide your guests with when you get rid of the signing-in book. But how do you get from a signing-in book based process to an enhanced visitor journey?



5 steps to transform the process into a journey

Fundamentally, it's an attitude 'thing'; you simply make people feel welcome, feel at home, and anticipate their needs... This is something many already try to do.

Visitor Management is not about tech for tech's sake. Technology supports, simplifies and smoothens the practice, giving it a magic touch, making it a memorable experience that elevates your brand.

However, not everyone 'gets it' - these reasons for a great visitor experience. Even if they do, it's not an urgent problem. It helps to understand how to make the case to each stakeholder group with

an interest in enhancing the visitor experience, as well as those that may be impacted by the acquisition of the necessary technology. Here are some steps that turn the process into a journey:



01

Search the Internet

An internet search on the keywords 'Visitor Management' is likely to figure in your research activity. Aim to come up with a shortlist of 2 or 3 'possibles'.

Try to keep in mind the following:

Keep the project simple

You want the project to be simple for everyone involved because **Visitor Management is not top of their list of priorities.**

Simple Project = Simple Product

These days if you want simplicity you turn to the web. No doubt the simplest product is going to be **cloud-based** as there is no hassle with troublesome stuff that impacts IT with all the technicalities like installing servers, software, back-ups, training and support.



Easy to use

Intuitive, straightforward, obvious – **avoid software that is hard to use** as people won't want to use it. Did you need training to use Facebook? Probably not... Why can't it be the same with something as simple as welcoming guests?

TIP: Read reviews

Before booking a holiday or a table, the chances are that you'll visit TripAdvisor to help you decide. You probably also read reviews before downloading an app on your phone.

Do the same when you decide to replace your logbook.

Nice, modern, contemporary design

After all it's the 2nd decade of the 21st Century, not 1985! Good design is pivotal to a great user experience because **it makes software easier to use.**

Flexible

Find out if you have **choices for different printing devices or badges** or if it forces you to buy specific hardware.

Make sure you can add your own fields so that you can ask specific questions to your visitor.



Check for an API

An Application Programming Interface (API) typically allows data to be exchanged with other software applications; the API enables the software to be integrated for analytics or uploading external data. It also means **your IT colleagues will be happy.**

Look for free trial information

With any important buying decision, **try before you buy**, so you can see the software in action - if you can't, then maybe concentrate on others that you can trial before buying.

CHEAT SHEET to spot systems for the shortlist

Offer free trial ⇒ You can test with no costs

No investment ⇒ Just a monthly fee

Cloud-based ⇒ No need to involve IT

No long term contract ⇒ You can get out at anytime

Good (authentic) reviews and solid references ⇒ You are not alone

Nice design ⇒ Reduce or remove need for training



Take 2 or 3 free trials

When you can't test a solution in a few clicks, it's not really worth considering it.

If testing the software requires downloads, server installations or other lengthy investments in time before you can even begin to evaluate the benefits, then it is likely to be more hassle than it is worth.

The best solutions should offer simplicity all the way down the line.

Here are some tips to help you get the most from a trial. It is not only about testing a new system but also about changing the way your reception desk operates.



A new system...

Don't hesitate to **ask for a demo**

- Make sure you have all you need beforehand:
 - A printer if you want to test the printing function and the badge. You should be able to print badges from the web application
 - Badge rolls, obviously...
 - An iPad and its holder if you'd like visitors to self check in (recommended)
- Remember that you no longer have one logbook but two areas you'll need to test
 - how visitors check in and
 - how you and your colleagues manage and track visits...
- If your building has multiple entrances or if your company has multiple offices in one or more countries check that the solution you choose can adapt to your company.

...and a new way of working

- Understand how to work with the solution to improve the experience you give to your visitors
- Eliminate legacy signing-in book process steps such as:
 - Asking “What is your name?” and “Who are you here to visit?”
 - Instead try to establish relationships with visitors
 - Make them feel at home and anticipate their needs
- Understand how the tool can help you save time and provide a great visitor experience
 - For recurring visits remember what frequent and important visitors like
 - Offer the same refreshment they chose last time as a first choice
 - Print badges in advance
- Try to get rid of the reception desk – stop it being a wall
 - Try a new approach to welcoming visitors by coming out from behind the desk with the iPad and offering it to the guest to check-in
- Aim to make it smooth, hospitality worthy of a 5* hotel. In that context **don't hesitate to try new things.**



How to run a free trial without bothering IT?

If you can connect the iPad to the wireless network on your own, then yes it is possible! By the way - a free trial without IT help is only possible if you choose a cloud-based application.

There might be one exception to an IT-less free trial. Printing! If you want to print badges during the trial you will probably need to install a driver on your computer.

03

Involve co-workers in your trial

You want the test to be as realistic as possible so that you can make the most of your trial. So grab your iPad, install the app and put it on the reception desk.

If decision makers ask you about it, just tell them you are testing a new initiative to help improve how visitors are welcomed and you will review the process with them at a later stage based on actual data collected during your trials.

TIP: Top Piloting tip

You should also be able to test the solution without needing to involve everyone in the company and imposing email or SMS notifications on them.



In order to make it realistic you need to have a few people on-board.

The objective of this step is to **have key users and visitors adopting the solution.** They need to try it before they are able to form a valid opinion on whether they like it. Maybe find a team within your organization who would be

willing to test it with their visitors. You obviously need to involve the reception team and probably the office management team as a whole; they should all have an access to the system.

When testing solutions, add your colleagues' email addresses and phone numbers so they see real-time notifications first-hand.

The next best thing would be to have several co-workers on-board so that you can test some or all of the interactions between front-desk and staff:

- How easily can staff members pre-register their visitors?
- What do e-mail invitations to visitors look like?
- How fast is the pre-registered check in on the iPad?
- Do hosts receive a SMS/ email notification when their visitor checks in?
- How does the host communicate back to front-desk?
- Are relevant people notified in case a visitor has not checked out?



Getting feedback

- Try to test for a few weeks and gather feedback from both colleagues and visitors, ask them proactively what they think of the various solutions you are testing
- Test their support
 - See how responsive they are to requests for assistance during the trial and inquire about planned developments
- See if they are active on social networks
 - What are they are saying, what are their opinions – are they thought leaders?



TIP: Winning support from IT

For many, gaining support from the IT department is likely to be a significant factor in ensuring a trial is a success. Here are some key points to make when trying to secure their buy in:

- It's an easy project with no significantly measurable impacts on resource
- The trial does not take long to set-up
- Although the impact on IT is minimal, it's a tech solution and reflects positively on the IT department
- You need to make this trial a success before presenting it to decision makers
- An iPad and probably a printer are essential for helping you to conduct a full and proper trial

04

Get some buy-in

Now that you have a working solution with satisfied users, you have a strong case with which to proceed. As soon as you have proved its success in step 3 you can gradually invite key stakeholders to join the service.

The objective is to get the buy-in of key stakeholders; the influencers that are able to shape the discussion and make the case to the decision makers. You might be an influencer, but it is going to be easier to 'sell' it into your business if you co-opt other influential co-workers.

Key people in your organization should know how much better it would be if we used a tablet instead of a signing-in book. Some key people that you should recruit to the cause include:

- Security
- Facility Management
- IT
- Senior Management

For these key stakeholders, important benefits of getting rid of the signing-in book include:

Security

- Up-to-date emergency list accessible from any internet connected device
- Enhances security by providing accurate count-in and count-out
- Visitors made aware of any site restrictions
- Part of smarter approach to convergence of security with IT

Facility Management

- More efficient reception desk
- People in the organization will be impressed
- Part of a smarter approach to buildings and site management

IT

- Easy set-up
- Everyone in the organization sees it (SMS/ email at check-in)
- Hi-visibility - a feather in the cap of IT (even though it's cloud-based and requires limited work)

Senior Management

- Modern, professional image
- Impress visitors
- Same visitor journey in all company offices around the world

05

Engage as a partner not as a supplier

Once you have settled on the solution that is right for your business, look to engage the service provider as a partner and not just as another supplier. You are looking to enter a mutually beneficial business relationship, not just make a one-time purchase of a product.

Cloud-based, online (or Software-as-a-Service or SaaS) application service providers operate on a subscription business model, generally on a rolling monthly basis.

As the customer, this puts you in a position of great strength. **At the end of each month there is the potential for you, as the buyer, to simply walk away.** Consequently, SaaS service providers have to work hard at delivering good quality service every single day.

Here are some tips for engaging as a partner:

- **Start an open and honest dialogue** with the service provider
- **Let them know** what you expect
- Avoid negotiating aggressively
 - Forcing service providers to reduce operational margins sets the relationship up as buyer-supplier rather than partner-partner



Conclusion

In the quest for competitive advantage over your company's competitors, brand perception is of the utmost importance. It is also relatively easy to exploit because it is within our grasp to shape how customers, service providers and partners see us.

Visitor Management has an important role to play in providing positive experiences. A good solution represents an easy win, because it is a relatively simple project that has a big impact on the way others see your company.

Internet applications make testing and operating the solution easy. From trial to implementation, support for day-to-day operations and for stakeholders including reception, security, IT, FM as well as hosts and assistants, Visitor Management makes for a great all round experience.

Remember that a visitor is often a potential customer of your company and that front-desk is the first impression he or she will get!

Proxyclick provides web based software that manages visitors to your office, from invitation to checkout.

Our vision is to leverage the power of the web to fundamentally transform the way people are welcomed in corporate offices around the world.

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