



The No-Nonsense Guide to Scheduling Software



ASURE
SOFTWARE

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INTRODUCTION

When evaluating and purchasing the right scheduling solution for your company or organization, it's important to understand all the benefits before beginning the selection process. That's why Asure Software created this non-vendor biased guide — to provide the essential information you need to make the best possible decision. This guide is designed to help you build the business case for a meeting room or resource scheduling system. You'll learn how to create an effective deployment plan, ask the right questions, identify the challenges, and much more. You may ask, "Why would a software company like Asure Software distribute a guide that doesn't promote its own products?" We strongly believe that you should have all the information you need to make the right decision and choose the right scheduling system that best fits your needs. In addition, we are confident that the more you know about scheduling solutions, the more likely you are to seriously consider — and ultimately choose an Asure Software solution.



UNDERSTANDING SCHEDULING SOFTWARE

Scheduling entails more than just software to automate your processes — it's a business process that ensures your staff can leverage synergy from group work. A good scheduling solution creates value for your business by increasing the efficiency of room and resource management and creating a process that makes it easier for everyone to do their jobs.

Understanding your company's needs and preferences will help you to:

- Reduce time spent on scheduling and managing meeting rooms and resources.
- Increase the efficiency of the entire staff by ensuring they always have the right meeting rooms when they need them and with the right equipment.
- Provide value-added services such as catering, technical assistance, computer, audio, and video equipment.
- Avoid management and employee frustration resulting from double-booked meeting rooms and from those that don't meet their meeting requirements.

By effectively automating these scheduling functions, a robust and cost-effective system makes it easier for everyone to work together and become more effective, ultimately raising the productivity of your organization. And we all know that improved productivity is something every company wants to achieve, probably yours as well.

An efficient scheduling system gives your staff the tools to take advantage of the organization's meeting rooms and resources — quickly and easily. Among the many benefits to your organization are:

Improved servicing of staff

The staff of an organization, in the simplest form, are internal customers with their own unique meeting room and resource needs. As such, it is vital that a tool be available to help ensure those needs are adequately met. The right scheduling system allows your administration team to take a proactive approach to serving your staff. With real-time information at your fingertips, your staff will always have the rooms and resources they need, when they need them.

Enhanced resource management

Scheduling systems automate the entire process of managing meeting rooms and resources. Management and employees can effortlessly view available resources and make the requests they need. As an administrator or the person charged with scheduling, you will be able to efficiently manage and track the usage of all meeting rooms and resources. You will be able to prevent scheduling conflicts, double bookings and help ensure that people in meetings have the equipment they need.

Greater efficiency

The right scheduling solution will help increase productivity by eliminating "telephone tag" and unnecessary emails, while also creating a consistent process for the entire organization.



GETTING STARTED

Before making any new system purchase, most organizations require that a business case be developed to justify its need. Thus, identifying the numerous ways your company will receive value from a new system is of paramount importance. Developing the business case for scheduling software requires the necessary background information to help you clearly identify the need, justify the cost and show how the organization will receive value from its investment.

DEFINE GOALS

It is important for everyone on your team, as well as the rest of the staff, to have a common understanding of the goals for the scheduling initiative. As a first step to this, you will need to identify what your management and employee's objectives are with regard to scheduling meeting rooms and resources. Once you have this, you can begin to discuss these with your decision makers and come up with an appropriate set of next steps.

EVALUATE YOUR CURRENT PROCESS

Start off by interviewing some of the people who use your meeting rooms and resources and find out how the current process impacts their work and productivity. Find out their opinions on the current ways of booking meeting rooms and resources; ask if they can identify what can be improved upon. By identifying what is working and what is not, you will be in a better position to determine your needs and develop an implementation plan that will be very close to your team's ideal process.

Ask the right questions

It is vital to ask the right questions, particularly when trying to identify potential alternative solutions. Examine some of the challenges your organization is currently dealing with, for example, the time and effort it takes to find out what and when audio/video equipment is available, and then communicating with the relevant people to ensure those requested resources will be provided.

Here is just a small sampling of potential questions you may want to ask:

- How are inefficiencies in finding and requesting available meeting rooms and equipment negatively impacting your organization's employees?
- What do you need to effectively track the availability of the meeting rooms and related equipment?
- What type of information and reporting do you need to help manage and track the rooms and services; for example, the requests for food and beverages?
- What information do you need that currently resides with other people, such as computer-related set-ups, audio/video equipment, tables and chairs, etc.?

UNDERSTANDING THE ESSENTIAL COMPONENTS OF SCHEDULING SOLUTIONS

Scheduling systems increase the efficiency of meeting room and resource management. They are designed to increase the productivity of administration teams and teams related to catering, information systems, audio/video and facilities as well as the management and employees using the rooms and resources. By better understanding the key areas of a scheduling system and the varying ways it can help your organization, you will be better able to convey those benefits to your decision maker.



The following describes the core components of a solid scheduling solution:

Unified system

To eliminate double bookings, schedule conflicts and other related problems, organizations typically desire a unified system, where all scheduling information is consolidated into a single database. Conflicting reservation requests can be immediately detected. Double-booking can be avoided. And all the constituent elements of a reservation — rooms, attendees and services — can be kept in synch.

Universal access

To accommodate all the constituent users, the scheduling system must accommodate employees accessing the central system, viewing the meeting rooms and resources and their availability, and then submitting requests to the people responsible for scheduling those resources. This means the system may need to be accessible to a wide range of users at numerous locations. Robust scheduling systems meet these needs by providing a range of interfaces — enabling access via PC desktop, Web and even room-based LCD panels and handheld PCs.

Powerful searches

To help increase the efficiency of staff, you will need to reduce the amount of time they spend in finding and processing the meeting room and resource requests. Effective search capabilities of a scheduling system will do this. For example, a scheduling solution should provide the ability for its users to search for a room based on its size and capacity, its location, the equipment needed, etc.

Rapid reservations

A robust scheduling system will provide the tools for users to quickly and easily:

- Pick the needed meeting room or resource and then choose the time and date.
- Choose desired attendees and send invitations through integrated email capabilities.
- Submit request for food and beverages, computer equipment, audio/video equipment, room set-up such as additional tables and chairs, etc.

For larger organizations with a centralized process, tools that allow general users to submit reservation requests to an administrator will be of benefit.

Automated notifications

Email notifications allow you to send meeting invitations, notifications of changes to meetings and cancellations. These tools speed up the processing of the requests. A robust scheduling solution gives you the tools to:

- Help improve staff productivity by improving the communication process.
- Quickly pick your desired attendees and send out invitations.
- Automatically send email notifications to relevant teams responsible for providing supplies such as food and beverages, audio/video, computer equipment, etc.
- Easily alert staff of meeting changes or cancellation through integrated email capabilities.



Robust reporting

Reporting capabilities in a scheduling system enable you to better manage your resources. You want the tools to:

- Quickly identify what resources are being used most often or not at all, allowing you to take any necessary actions regarding equipment inventory and depreciation.
- Create reports that show the usage of equipment and rooms for client meetings to assist with client billing.
- Have the supporting data needed for additional resource purchase requests.

CONSIDER IMPLEMENTATION TIME

The speed with which software systems can be up and running quickly and smoothly can directly impact the bottom line of an organization. The benefits of a highly sophisticated and complex scheduling system can easily be offset by the additional time and money it takes to customize and implement the system. Look for a system that is easily deployed “out-of-the-box” and that does not require significant customization. These systems allow your organization to start experiencing the benefits almost immediately.

DEPLOY YOUR SYSTEM

With today’s advanced scheduling systems, you have the ability to choose from a number of different deployment options, from software that installs on a central server and desktops to Web-based systems to fully “hosted” solutions that are actually a service. You will need to define not only your scheduling system needs but also what financial resources you are prepared to spend. However, prior to this, you will need to answer a fundamental question related to having a system available to the organization: do you build it, buy it, or outsource the system?

Build it

If you are in a large organization, you may have access to an internal software development or information technology group that may be able to build the system for your organization. The disadvantages to this option are that it will likely take, depending on your IT resources, many, many months to develop and it will be very expensive from a people resource perspective.

Buy it

Many organizations do not require extensive customization and integration to have their feature requirements met. Many of today’s robust systems provide extensive feature capabilities along with built-in customization tools that allow you to configure the system to meet the unique needs of your organization. If you and your budget can do without the bells and whistles, you may be much better off looking for an offering that provides “out-of-the-box” customization tools and a low cost. These types of systems are typically easy to install and require little to no work from outside consultants. The implementation period for this type of option is typically much shorter, and, thus, gives you the significant benefit of a lower cost.



Subscribe to it

This option is known as a “hosted” service. Typically, a scheduling software vendor will make their software available as a service and become what is known as a SaaS (Software-as-a-Service) provider. These SaaS vendors either have their own data center or work with the third-party company whose core business is providing hardware infrastructure. The SaaS vendors manage the application with their own support and maintenance staff. Your staff simply accesses the system through a Web browser. There is no installation of software on your system. However, this means the data you input into the software does not reside on your computers. You simply pay a subscription fee, usually on a per-user, per-month basis. This option requires less up-front costs in the short term, as it eliminates the need to acquire in-house hardware, meaning you don’t have a large capital outlay. The benefit of this is you can switch from a capital cost to a monthly business expense, allowing you to save your valuable capital funds for other company needs. Another benefit of the hosted service is you do not need to involve the IT department for installation and ongoing maintenance, e.g. deploying upgrades. This is a key benefit because many IT groups are short on staff and overburdened. Another notable benefit of a hosted service is that you never have to worry about upgrades; you will always have the latest versions of the software vendor’s product. However, over the long haul (3-5 year period), hosted solutions may cost more than in-house deployments because of the recurring fees that are charged. An important consideration regarding hosted solutions is the flexibility to adapt to an organization’s unique scheduling processes: make sure the customization capabilities your organization needs are not lost when considering software provided as a service.

TOP FEATURES TO LOOK FOR IN A SCHEDULING SOLUTION

While each organization is unique, the following are almost always common to their room and resource scheduling needs:

- 1** Simple, easy-to-navigate user interface. A central interface where users can view, search, schedule or submit requests for meeting rooms and resources. This saves users’ time in finding the rooms and resources they need.
- 2** Built-in customization tools to fully configure the interface, screens, workflows and processes. Tools that do not require deep technical knowledge to use. The benefit of this is so you can customize the different screens and features to adapt to your unique business processes.
- 3** Security levels. Allow an administrator to grant varying levels of user capability to different levels of staff. For example, certain people should be able to directly book available rooms while others would only be able to view availability and submit room requests. This improves the management of the rooms and resources.
- 4** Integrated automated email notification capabilities. Expedite meeting room and resource request processing. This saves time for users and eliminates the potential for errors. Ability to scale to multiple locations. This is critical for organizations with meeting rooms and resources in many locations.
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- 6** Ability to access from anywhere, anytime — a Web-based system. You don’t want to be limited from requesting a meeting room or resource because you are out of the office or do not have a piece of software installed on your PC.



- 7 Flexible reporting. Have access to built-in reports as well as the capability to use third party report writing tools to create your own reports. This enables you to better track the usage of your resources.
- 8 Real-time data. The information goes into a central database, which provides data that is always current for all users. This means that what one user sees is consistent with another user's view, preventing errors and scheduling conflicts.
- 9 Resource inventory tracking. The ability to track and monitor the quantities of the meeting room-related equipment. This feature ensures staff always has the equipment they need in their meetings.
- 10 Speed and ease of installation. A short, simple implementation will reduce your costs, allow your organization to start experiencing the benefits almost immediately and minimize the impact on your business operations.

And when evaluating a hosted solution

- 11 Secure infrastructure. Evaluate the vendor's hosting infrastructure to ensure it provides adequate security and availability guarantees at the physical, network, server, application and data levels. Look for a professionally-managed data center with 24/7 monitoring and a proven track record of providing secure, high-availability service.
- 12 Core functionality remains intact. A hosted solution offers many benefits. However, one of the few drawbacks can be limitations in functionality of the software. Make sure the SaaS product you are considering has a reporting alternative, typically a collection of built-in reports.

SELECT A SYSTEM THAT'S RIGHT FOR YOU

Choose three systems that you believe best suit your needs, then ask each vendor to provide the following information:

- Estimated up-front and recurring license and maintenance costs for your implementation
- Estimated build-out costs to adapt the system to your requirements
- Recommended hardware and prerequisite software (for in-house deployments) from which you can estimate acquisition costs
- Requirements and estimated effort for in-house IT deployment support
- Timeframe for implementation
- Training methodology and training costs



VENDOR BACKGROUND INFORMATION

It is important to get to know your vendor. Purchasing a scheduling system is an investment; you want to make sure the vendor is going to be around for the long term so you can continue to experience incremental return on your investment. Here are some questions you may want to consider asking:

- How long has the vendor been in business?
- How many employees does the vendor have?
- How is the company funded? Be wary of start-ups with no track record or customer base; these types of companies may not be around next year. If you are the decision maker for your organization's scheduling software, the risk you take by going with one of these vendors may extend to your own position.
- Does the vendor have a customer base that includes organizations of your size? This ensures the company understands the needs of your type of organization.
- Does the vendor have customer references?
- With hosted service vendors, does the vendor partner with an infrastructure company that provides secure and robust infrastructure?
- What is its vision for the future — for its products and for the company?

These are just some of the questions you want to bring up when evaluating scheduling systems.

TRY BEFORE BUYING

When evaluating commercial software products or hosted solutions, most vendors will allow you to try the product for a limited period of time. By engaging actual end-users in trials of the prospective scheduling solutions, you can ensure that the solution you pick can be easily adopted by your organization.

USER-FRIENDLY SOFTWARE — NEVER SETTLE

One of the key drivers in the success of any software system is user adoption; and the number one factor in user adoption is ease-of-use. So, while one system may provide an extensive array of sophisticated features, if the system is not user-friendly, your company will not be able to maximize the benefits of the system because it will not be adopted by your user base.



Here are some questions to ask during your evaluation process:

- Is the software interface laid out in an easy to understand fashion?
- Is the interface intuitive? How much thought does it require to figure out the primary features?
- How many “clicks” does it take to perform primary features? Generally, it should take only 1-2 clicks to access a specific feature and no more than 2-4 clicks to complete a task; features that require many clicks often indicate a poorly designed system.
- How easy is it to navigate between modules of the software?
- Can the interface be modified to more closely match the needs of your organization?
- How easy is it to customize the user interface? How much technical knowledge do you need?
- Does it require professional services?
- What type of software documentation and training will be provided?
- Can the vendor back up their ease-of-use claims with customer testimonials and references?

INQUIRE ABOUT CUSTOMIZABILITY

Depending on the size of your organization and your requirements, you may want to customize the interface and features. Ideally, you want the system to be able to adapt to your organization’s business processes. Can you configure the interface? What level of customization does the product provide? How easy are customization tools to use? How much technical knowledge is required to customize the product? Does the product provide the ability to create and modify fields, screens, views and security settings on the fly? If you are considering a hosted service, make sure to confirm that these customization capabilities are available. Will you need the vendor’s professional services to do the customization? If you need these services, you can count on your costs going up.

FUTURE ENHANCEMENT AND MAINTENANCE

Reputable software companies invest in engineering and develop new product features and enhancements regularly. Many vendors provide enhancements as part of their maintenance and support programs. These companies leverage emerging technologies to enhance their products. Lastly, established software vendors provide product upgrades at reasonable prices or as part of a yearly service agreement.

EVALUATE TECHNICAL SUPPORT

While your internal IT support person will be a good resource regarding technical questions or other issues that may arise, it is likely you may still need to turn to the software vendor’s technical support team as well. Here are some questions to ask regarding the vendor’s technical support team:



- How quickly are calls taken from customers?
- What are the hours of operation?
- What options are available for after-hours questions or concerns?
- Does the vendor provide customers with response guidelines on how product issues are handled?
- What charges or service plans are involved?

YOUR BUDGET

As you already know, your scheduling system is a business investment. Therefore, one of the major considerations in your system and deployment evaluation is the return on investment (ROI). If you are concerned about budget, you may want to consider a hosted service as this offers the benefit of much lower start up costs. Another benefit of the hosted service is that the cost goes from a capital cost to a monthly business expense. Be up front with your vendor about your budget. Ask the questions outlined above to ensure you understand all costs involved — license fees, maintenance and support, deployment fees, training fees and the like. With this, you should be able to make an informed decision that fits comfortably within your budget.

JUSTIFY THE INVESTMENT

Once you have reached a decision about which product to purchase, it will be highly beneficial to create a document or presentation that clearly outlines your decision. This document should provide information on the features of the system, the direct benefits of these features and the subsequent long-term value to the organization. Your document should also provide all the details concerning the total cost for implementation, training and ongoing maintenance. The primary benefit of this due diligence is to help you get the mindshare and buy-in of your upper management and, ultimately, final purchase approval.

IMPLEMENTING YOUR SYSTEM

After you have been given the green light and have purchased your desired system, you are now ready for installation of the system. By this time, you will likely have already engaged your IS/IT staff. Once your system is installed and fully operational, the next step is company-wide implementation. If you are a small company, this may only require user training and you can be up and running in a very short time across your organization. For larger organizations, you may want to consider the following guidelines:

Create a blueprint

For a smoother implementation process, it will be very helpful to create a “blueprint” of your scheduling related processes, either with an internal team or your vendor. With this type of document, your rollout team will have a predetermined plan and a set of guidelines. Take full advantage of your vendor’s experience to help you determine the best plan for you. Set the expectation that the plan itself may change, but your goals and guidelines should remain the same. Remaining disciplined and sticking to the plan will lead to a short and successful implementation.



Prepare for configuration

Every organization has unique business processes. As such, no one scheduling system will address every one of your unique needs. You should expect that the software will need to be ‘tweaked’ in certain areas so that it will adapt to the way you do business. In general, advanced scheduling systems provide extensive functionality. However, as noted earlier, the good ones will provide built-in tools to allow you to adapt the software to your unique needs.

Get parties involved

Once you have decided on a particular system, it will be beneficial to engage and interview people whose work in the organization is related to the provision and maintenance of the meeting rooms and resources. This will facilitate a smoother implementation process. Fully involving your staff is absolutely crucial to ensuring your scheduling system is fully utilized and providing a return on investment. Thus, it is vital that you consider how the changes may impact your staff, and develop a contingency plan to resolve anticipated problems during the early stages of the project. This will go a long way to ensuring a smooth adjustment to all involved. There are typically five groups you should involve:

- 1 Schedulers**
Identify a select group of primary end-users of a room scheduling application, as they will be the most sensitive to the feature and usability requirements of any solution. Provide opportunities for them to test the application you are considering to ensure it will meet not only their functional needs, but will be easy to use. Assess the effort required for this group to learn the product as a consideration for later deployment and training requirements.
- 2 Information systems/technology**
You will need to involve the IS/IT individuals in your organization as they typically oversee the computer hardware and software as well as the supporting network, meaning they are the ones responsible for providing any needed computer equipment for meeting attendants. If you are considering a hosted service, you will not have to involve your IS/IT team.
- 3 Catering**
Staff responsible for catering will need to be involved as any robust scheduling system will typically coordinate with the catering people or those in charge of ensuring food and beverage needs are met.
- 4 Audio and video**
In many organizations, the same people who manage the information systems also manage the audio and video equipment. If this is not the case within your organization, you will need to involve them in the process to determine their needs and expectations.
- 5 Facilities**
Depending on the meeting rooms, additional chairs, tables, podiums, lecture equipment, etc. will involve the facilities people. Again, a robust scheduling system will typically engage this group.



Provide training

While most would think training is a given, many organizations fail to take into account the disparate levels of computer literacy of its staff and the speed with which people grasp software systems. It may be helpful to familiarize relative computer novices as early as possible, and not wait until your system is ready to be rolled out. User adoption is the key to the success of your scheduling system. Ensure the training is adequate for all your staff.

Phased roll out and launch

It is highly recommended that your team fully test the scheduling system's feature sets and ensure it is functioning properly before you make the system live for the entire organization. Assign some of members of your staff to use the system as they would normally use it in day-to-day situations. Once you see that all it is fully operational, you are ready to go with the full rollout.

Rollout time — segmented groups

Determine a time to roll out your new system. Since staff will be busy with their jobs, it may be difficult to coordinate a "right time" for everyone. You may want to consider breaking down staff into smaller groups and rolling out the system in stages. This way, you won't have to deal with the time-consuming task of "herding cats." You may even consider executing the new system on an incremental or feature-by- feature basis.

CONCLUSION

From understanding your scheduling needs, to building a business case, to implementation & beyond, a little pre-work is paramount to choosing the right solution for your business. If you have questions about anything you've learned in this document, please contact us at 888.323.8835 or asuresoftware.com. We invite you to learn more about AsureSpace™ Meeting Room Manager by viewing a [demo](#) today.

About Asure Software

Asure Software, Inc. (Nasdaq:ASUR), headquartered in Austin, Texas, offers intuitive and innovative technologies that enable companies of all sizes and complexities to operate more efficiently. The company ensures a high-performing work environment by integrating its "keep it simple" solutions and expertise to more than 3,500 clients worldwide. Asure Software's suite of solutions range from time and attendance workforce management solutions to asset optimization and meeting room management. For more information, please visit www.asuresoftware.com.



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