

Implementation Study: A provider of Investment Management Services

A leading provider of investment management services upgrades their HQ, adding AskCody, too. The Manager of Workplace Services and the Audio-Visual Technician from Corporate Operations was interviewed for this case study.

11:00 AM - 2:30 PM

Workplace booking



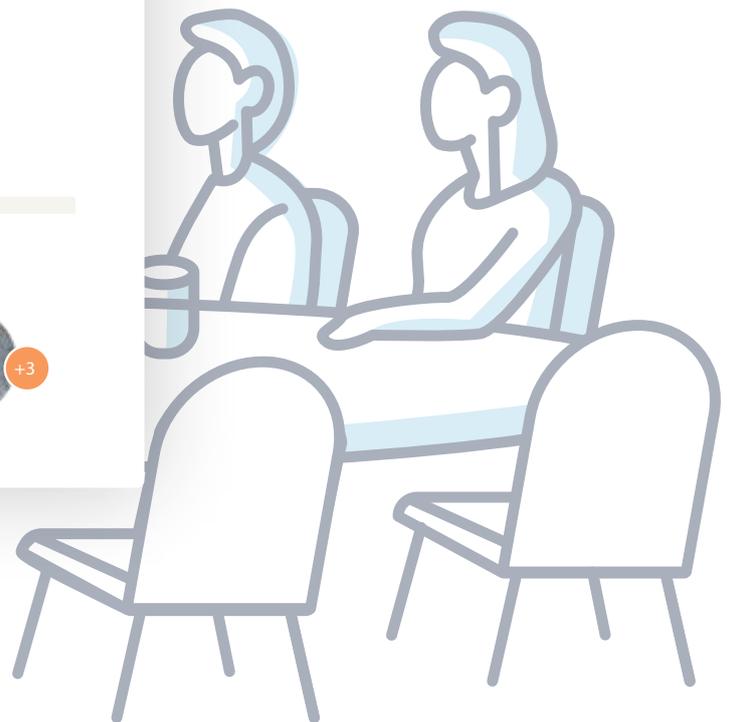
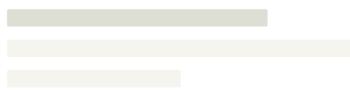
Catering



Visitor Management



Client Meeting



Case: As part of an expansion of the HQ and a top-down audit of business processes, a very large Investment Management Provider upgraded their HQ using AskCody to power meetings, hot desking and interactive mapping.

Implementation: Most of the AskCody platform was put to work as a resource management stack in a brand new headquarter with four times the meeting space as in the old HQ.

Ownership: Manager of Workplace Services and the Audio-Visual Technician from Corporate Operations.



AskCody is a key solution to book and manage meetings with ease

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With a global portfolio of managed assets valued over \$100 billion, a leading investment manager is one of the largest institutional investors within the capital markets.

Their activities help finance the retirement benefits of more than 500,000 retirement plan members, as well as the insurance and benefit funds that cover over 2 million workers (Pensions, 401ks, etc...).

A leading provider of investment management services currently employs 500 workers and continue rapid growth decided to expand the corporate headquarters. The original corporate HQ had 25 always-booked meeting rooms.

The new space has 98 meeting rooms across 12 floors.

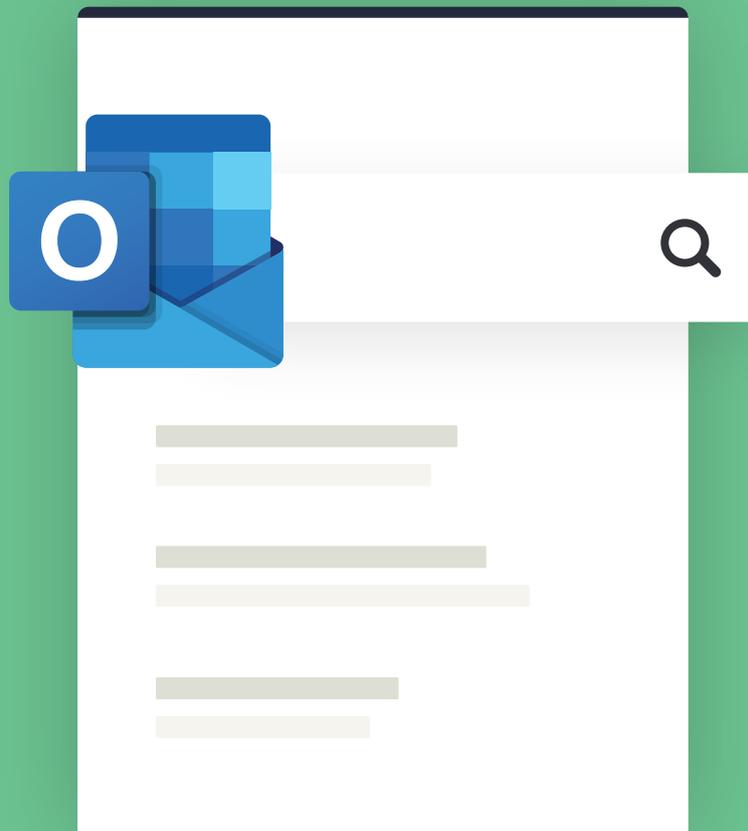
As part of the building upgrade cycle, the quantity of meeting spaces, AV equipment, and their resource management software processes were all reviewed for potential improvement.

AskCody was chosen for resource finding, meeting space management, workspace bookings, AV service ordering, visitor management and workplace analytics.

The Manager of Workplace Services and the Audio-Visual Technician from Corporate Operations was interviewed after the implementation.

What were the criteria you used when making the decision to buy AskCody?

It must be a Microsoft approved solution that integrates with our Exchange, Office 365 and Outlook, and Active Directory, it must be secure and comply with highest InfoSec standards, easy to use for end users, and be easy to implement for IT.





Interview with the Manager of Workplace Services and the Audio-Visual Technician

What were the major pain points of your processes prior to using AskCody?

We were utilizing room booking devices (Crestron) connected to Outlook. These devices were outside of the meeting rooms and are expensive. With the move from 25 meeting rooms to over 98 bookable meeting rooms, the device was no longer feasible.

What were you trying to achieve with implementing AskCody?

The thing we tried to achieve was to implement a "one-stop-shopping" for our end-users, and that was being able to order catering, AV requirements and any room set up in one central location and system, and it was very important for us from an end-user perspective that booking a meeting look no different than what our end users are currently used to in Outlook.

In a lot of the other platforms on the market we have to leave Microsoft Office and go to another interface to do this booking, and that would not have been an easy sell internally. AskCody was a much easier transition because it looks the same as the native Outlook experience, but it's easier for the end-user as you can do all the requirements of your meeting in this one spot. So, we've added a few buttons to Outlook for the end-user to enhance what they're doing with a meeting.

And then the beauty of AskCody was that we had another system (Proxyclick) for visitor management and we were able to tie that back into Outlook again with the "one-stop-shopping" experience from AskCody.

We were quite happy with Proxyclick, and we only made the switch because it was about the "one-stop-shopping" strategy. Prior to Proxyclick, which we've been using for two years, everything was handled through pen and paper.



How did you manage AV requests, catering and visitors prior to implementing AskCody?

All this was handled by separate email. Our end-users would have to book a meeting in a meeting room and then have to send an email to one team with two different individuals for the AV-equipment and room setup, and one email for the catering to an entirely different team. Also, we'd had to send an email to security to let them know that external guests were arriving.

So, essentially, we had five steps which have now greatly been minimized.

Why did you want interactive maps with Free/Busy view of meeting spaces?

We had the Crestron room booking hardware/software solution in place and that works at one level where you walk up to a touch panel to see what's happening in that room, but you can't see it online.

If you wanted to know if a room was open, you ended up walking up and down the hall looking for a green light, which doesn't work when you move into a bigger building with 98 bookable meeting rooms. So, we wanted people to see that visually from their desks. With AskCody, we get that. And again, it

integrates nicely with Exchange so we don't need the Creston devices anymore.

How long had you been looking for a solution to this problem?

6 months.

Were you comparing alternative solutions? Which ones?

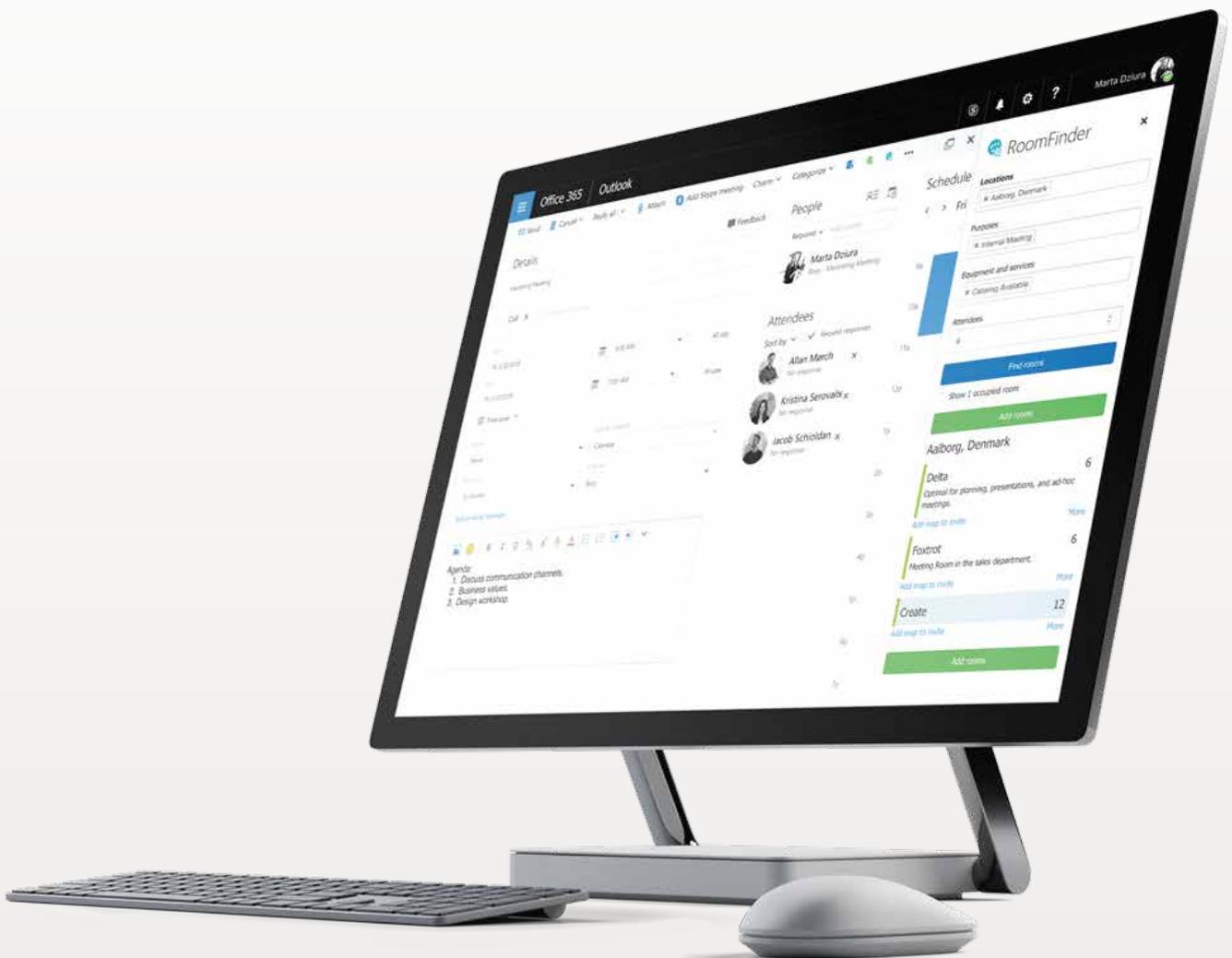
Yes, iOffice, Resource Central (Add-On) and others. We were quite far down the road with Resource Central and in fact ready to pull the trigger when we stumbled upon AskCody.

I believe the AskCody price point was a bit higher, but thankfully we were able to work that out.

I don't believe that they can do the catering, the room set up and AV requests as well as the visitor management piece altogether as seamlessly. Also, what we found was the AskCody user experience was just slicker.

AskCody provides us with the one look on a map where we can easily see what meeting rooms are available and what's not, and the WayFinding is even integrated with the visitor management, and Resource Central was just missing some of those slick key components we were really looking for.

What is your favorite feature or part of the platform?



“It still looks like we are using Outlook and Office 365. Workplace bookings, room setup, AV, and catering can all be completed through this application inside of Outlook.”



What was the most obvious advantage you felt our product offered during the sales process?

It was important to us that staff felt they were still going to Outlook to make their booking. It would not make them feel like they now had to go to another place to book a room.

What were the criteria you used when making the decision to buy our product?

Is it a Microsoft approved product, how does it integrate with our systems, is it secure, ease of use for end users and ease of implementation.

What is your favorite feature or part of our product? Why?

It still looks like we are using Outlook and bookings, room setup, AV, and catering can all be completed through this application.

Did you have any concerns prior to implementing Ask-Cody?

No. The implementation plan you had outlined made it as painless as possible.

Has your perception of the product changed since you've become a customer?

No, we're still very impressed. I know it's been successful because if it's not successful we'll hear it loud and clear from our end-users and we haven't heard that. It's been very quiet, so for that matter we know it's been very successful and everybody seems to be happy and in content with it, and it adds a lot of value.

What have people been saying about our platform since they've started using it?

We have an internal web-portal for our staff and the comments there has been that it's a very slick product that looks great and is easy to use, so really good positive feedback.



Is there anything about the solution you would like to see changed or improved?

The only thing would be if you have to do a change to the mail resources in the AskCody Manager, sometimes the only way to do it is to go through every box and check, like with e.g. Insights you have to enable separately for each single mail resource, but that's pretty minor and probably something your Dev team is already aware of.

Sometimes you'd wish you could "apply to all" and sometimes you can, depending on what you're doing. If there are any feature requests or suggestions for improvement, I'd be happy to share them with you along the way.

By using our product, can you measure any improvements in productivity or time savings?

We definitely know for catering that their job has been extremely streamlined with AskCody. They were originally apprehensive because they couldn't believe all the things they didn't have to do anymore.

All the emails back and forth for catering and catering not being canceled when a meeting has been canceled. They had to do a lot of

manual processes and manual checking and asking lots of questions to end-users about catering, so they estimate that they save in average 1 to 2 hours per day with AskCody.

Also, before AskCody security would have to answer an email and take information and enter into Proxyclick, so we've eliminated a lot of wasted time regarding visitor management. You neither have to communicate with everybody about canceled or rescheduled appointments as it's automatically updated.

We also see great time savings regarding buffer time, as the admins would have to go into Outlook and add buffer time to meetings/calendars manually to make sure they have the time to set up and break down catering, AV requirements, and room set up, which is now automated.

AskCody implemented Workplace, Meeting+, Welcome+, Office WayFinder and Workspace Analytics for the new HQ. All to create a better workplace experience.

[SEE MORE](#)

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Manager of Workplace Services and
the Audio-Visual Technician
Investment
Management Services



Are there any other value drivers AskCody adds to?

Through the visitor management and WayFinding AskCody provides, it's a nice way to welcome people who are external as they receive an email and/or text message prior to their meeting where they are welcomed which also includes a map to where the meeting room is. This adds to the things we do to be professional.

What is your advice to others who might be considering buying AskCody for their workplace?

We think you've done a tremendous job. You've been patient with us and our IT department, and you're always readily available or make yourself available.

You've made it feel like AskCody is not too big of a company and that we're just a number. You've made it feel like you're a local Victoria Islands company, and that's important to us. We're often quite worried about being on an island - we're even worried about dealing with people in Vancouver because it takes them a long time to get here and to respond, so we often look for a local company, and you've made it feel like you're a local company.

AskCody[®]