

SUCCESS-STORY

KIX digitalises cleaning service



KIX can be used to do much more than control and automate IT processes. One of cape IT's most unusual clients is Bavaria Cleaning, which uses KIX to control and track its business processes.



BAVARIA CLEANING

Here's what happens at any number of small and medium-sized businesses: telephone calls from customers and prospective customers are taken down on bits of paper that staff keep in different places and that get lost easily. When it comes to emails, the question is whether another colleague has dealt with it and, if so, how. Time and again, situations arise that cannot be tracked or reconstructed. Processes have "developed historically", things are "ticking over" somehow, but there are noticeable limitations.



The initial situation

Alexander Rebs, Jr, Managing Director of Bavaria Cleaning Gebäudereinigungs GmbH in Munich, concluded that things couldn't keep going on this way, and he started looking for a business process control solution. It needed to be open source, according to Rebs: "Everything that runs on Linux belongs on Linux." In addition to training as an office executive, Rebs also began studying for a degree in Information Systems, but soon had to take over his parents' company. Along with four other colleagues in the office, he now manages a company with more than 200 employees.

Rebs, who also runs Bavaria-IT as something of a side project, had the idea of using IT incident reporting tickets for customer communications as well.

Following testing, he began using OTRS from the start of 2014. "We'd already done all kinds of things with it", Rebs recalled, "but above all I got an idea of everything we could still do with it." The cape IT KIX4OTRS Community Version, introduced a year later, came closer to what he was looking for.

The project

As cape IT was introducing KIX, Rebs initially asked a sales advisor from the Chemnitz software house for a meeting and sought further detailed technical consultation. "The consultation was competent and realistic right from the start", said Rebs. "The technical consultation enabled us to set up the project in a methodical and orderly manner, and it made me aware of one or two further opportunities that I

wouldn't have thought of. It was very intensive and was absolutely worth it." Since the start of 2016 Bavaria Cleaning has been using KIX Professional with the smallest support package – and so far they have had no problems with the solution that have led them to lodge a complaint.

With KIX, the office work at Bavaria Cleaning is fully digitalised. Now, if an email or digital telephone call comes in from a customer or a member of staff, the cape IT solution links them immediately with any existing tickets. The ODBC connection enables further information to be retrieved directly from Microsoft Dynamics NAV. Staff enter new information relating to existing tickets as soon as it is available.

If a call comes from a prospective customer who has not been in contact before, standardised workflows are started. A contact is created in Navision and linked to a ticket in KIX. Templates are used to provide an initial written quotation along with the company brochure and terms and conditions. The user can set when the ticket will remember this first contact, in order to follow up with the customer. "The whole thing takes just seconds", explained Rebs.

New orders are processed by means of an automated workflow: order confirmation, contract delivery, allocation and briefing of cleaning staff, initial provision of materials and machines. There are many tasks that are partially dependent

Problem and solution

Client: Bavaria Cleaning Gebäudereinigungs GmbH in Munich

Request: Introduction of an IT service system and, based on that, a tool to simplify customer communication and order management

Scenario: approx. 5–10 application users coordinating more than 200 employees

Special circumstances: To be used not only as a service desk, but also for cleaning team order management.

Integrated IT environment: Debian Linux, MariaDB

Time frame: Project start November 2016, go live January 2017; ongoing support

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on each other and that have to be handled by different staff. "I can map this with KIX – very well, actually", said Rebs. "This was one of the main reasons we decided for KIX." Another reason is that a ticket for a secondary activity can be assigned to a specific property for customers with several properties.

This has exactly the effect that the Bavaria boss wanted for his company: "I can see the whole process at a glance. Every item, every answered and unanswered question, every agreement and so on. It's all in one process, without needing to rummage through emails or paperwork. It gives you reminders, ensures you meet deadlines. If we didn't have ticketing, we'd lose our overview."

Rebs commissioned cape IT to set up the initial system and to program an additional function. A "Print as letter" button formats a note as a PDF letter including address (from Dynamics NAV), subject line, date and personalised form of address. The text of the letter is generated from the note, and expanded as necessary using further text blocks stored on KIX.

And they certainly haven't stopped at their original KIX system. "We're constantly expanding and changing things", explained Rebs. He and his sister Melanie are constantly using a test system to create new workflows, employees, queues and other elements.

“ We used to have management by paper trail.”

Alexander Rebs, Jr, Managing Director,
Bavaria Cleaning Gebäudereinigungs GmbH

According to Rebs: "I probably haven't figured out everything KIX can do, but everything we need for work, and for continuous improvement, we can do ourselves. No problem."

The conclusion

The full range of possibilities is far from being exhausted. Rebs wants to use KIX to help improve a few more things at Bavaria Cleaning. Work is already under way on "conversation guidelines" that will run both on office desktops and on tablets. When talking on the telephone with prospective customers and when visiting a property, the system would provide all the basic questions required to provide a quotation: areas, types of floors, toilets, kitchens, desired cleaning frequency, waste disposal location, dealing with

the alarm system, etc. This information could then be used as the basis for a quotation and contract. According to Rebs: "KIX allows us to verify and track our agreed jobs."

The planned extension of the KIX Maintenance Planner on the basis of a Configuration Management Database (CMDB), in which all properties, contracts, etc. will be entered, will also support quality assurance. One aspect of the Maintenance Planner will be to provide reminders when further personal conversations with customers are needed. Rebs would then like customers to give his company a grade, which he would enter into a dynamic field. His intention is to use this grade to learn automatically where he should visit more often and where he needs to keep a closer eye on cleaning staff.

Another aspect of the Maintenance Planner will take more time. Rebs wants to apply specific rules to every vehicle and to specified cleaning machines as configuration items in the CMDB. When are cars due for tyre changes and inspections? When do washing machines and specific cleaning machines have to be de-scaled? When will it be time for the next inspection required by the accident prevention regulations?

The outlook

Everything is doable, I just need more time", asserted Rebs. "KIX offers mind-blowing possibilities. The system is incredibly flexible, when you understand everything it is capable of. At Bavaria Cleaning it serves as a basis for keeping track of communication with customers and for automating business processes. The company can grow without running up against limits as a result of outdated procedures."

About c.a.p.e. IT GmbH

c.a.p.e. IT GmbH is the industry specialist for open-source business processes in the field of IT and technical services. With over 10 years of project experience, its employees have comprehensive expertise and are ITIL-certified.

The company manufactures KIX and KIX Professional, the long-standing, tried and tested open-source software for technical services and ITSM. Qualified specialists provide field-tested supplementary modules for data and system integration, service and maintenance management,

invoicing of services, and reporting. KIX and its supplementary modules contribute to sustainable optimisation of service processes.

c.a.p.e. IT GmbH is a leading service provider and provides support for analysis, implementation, adjustment, training and upgrades as well as service, support and outsourcing.

The company is involved in the key industry associations Open Source Business Alliance, BITKOM and itsSMF.

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