

THE COMPLETE GUIDE TO SWITCHING SCHEDULING SYSTEMS



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Benefits of Switching to a More Advanced Event Scheduling System

The decision to switch to a newer, more advanced room and resource scheduling system—like any important business decision—should involve weighing the investment of time, effort, and capital required against the benefits on the other side of the implementation.

In many cases, the advantages of making a change are similar to those that you enjoyed when you first implemented your current system. However, as a system ages and technology evolves, those benefits diminish.

With a new, advanced solution, you'll be able to:

- **Assess and modify processes.** Switching to a better event management system can be the perfect opportunity to evaluate how you're doing things today and talk about whether changing certain processes could be good for your customers and your staff. This can be especially helpful in the wake of COVID-19.
- **Improve efficiency.** The automation of tasks available in a new system can help you get more done with less work, and enable you to manage more events with less effort.
- **Lower costs.** With a cloud-based scheduling system, there is little to no assistance needed from your IT department. You essentially just point your web browser in the right direction, log in, and start scheduling. The same is true for getting access to new versions of the system. Because your software "lives" online, as soon as the provider updates it, you have access to the enhanced features. This means IT doesn't have to visit every workstation and update the software.
- **Eliminate errors.** Today's event management software is "smarter" than systems produced even just a few years ago, let alone those with decades-old architecture. Many of the mistakes that can cost a scheduling operation dearly are now prevented from occurring.
- **Improve accountability.** Without a detailed history of every change made to an event and the person who made it, it's easy for team members to "wash their hands" of any mistakes that are made in booking or preparing for an event. Newer scheduling systems provide this type of information, which helps keep everyone sharp. This includes notifying service providers of event changes so they can accommodate them.
- **Streamline event operations.** Features like inventory tracking and anytime/anywhere access to setup details help teams be more productive since the information they need to do their job is always right at their fingertips.
- **Improved visibility.** A significant percentage of problems that occur with gatherings can be explained with three words spoken by customers or staff: I didn't know. An online calendar of events, access to room availability information, and centrally located and intuitively organized event details ensure that everyone is on the same page regarding meetings and events.

And these are just the *operational* benefits. Organizations that switch to a better event scheduling solution also enjoy things like happier customers, enhanced reputation, and increased career opportunities for managers and staff. When you're equipped to do your job exceptionally well, your improved performance tends to open doors!



8 Signs It's Time for a Change

The benefits listed above that come from switching to a more advanced scheduling system are always appealing. But how will you know when it's *really* time to switch? Actually, the signs are fairly easy to see.

It may be time to implement a new scheduling system if:

1. **Your current system is too complicated.** If your software has a steep learning curve, requires extensive training and practice to master, and makes it hard to get new employees up to speed, that's a problem. This, of course, can be difficult to see if you're too close to the issue. Try comparing (in your mind) your current scheduling system to a robust app you might have on your phone. The app was likely developed to be highly intuitive so that you don't need any help in understanding how to use it. You just open the app and start tapping. The farther your scheduling system is from that scenario, the more important it is to make the switch.
2. **End users are frustrated.** Do system users push back from their desk after completing a task on your current system and let out a dejected sigh or roll their eyes? Or worse... Do you find that your current system has a low adoption rate or faces a lot of resistance? Ultimately, frustration is not something you want your staff to be experiencing—especially since your customers are likely to be experiencing it as well.
3. **You aren't getting the type of support you want and need.** With legacy systems, you may find it difficult to connect with the provider's support team. Why? There are many potential reasons, but the most likely is that they're swamped responding to issues with their clunky, buggy software and your message has been queued behind dozens of others. And if the provider starts recommending additional services like training or consulting, that's a red flag. If the system were easier to use, you wouldn't need those services. You may also have trouble getting assistance from your internal IT department if they're busy troubleshooting other problems with the system. Bottom line: you should have a scheduling solution that you can use effectively without a lot of hand holding.
4. **Technology has changed and your scheduling system hasn't.** For example, today's event organizers want to be able to do everything from their phone. If your system isn't mobile-friendly, you're probably going to start alienating people. And, don't be fooled by "window dressing." Some providers will release sets of fairly unimportant new or updated features from time to time as a way to cover for the fact that they aren't making any *substantial* changes to the system's functionality or infrastructure.
5. **It's becoming cost-prohibitive to keep your current system.** Scheduling departments are getting hit from both sides in the wake of COVID-19. Department budgets are being cut even as software providers are looking to increase their revenue by raising their annual maintenance fees.
6. **Product development has stagnated.** It can be especially frustrating to pay your annual maintenance fee when part of the reason you've done so for all these years is that you've been promised system upgrades that now are few and far between.
7. **You're being forced to "re-implement" your current system for some reason.** If you're taking the time to refresh your current system, maybe this is an opportunity to get a solution with the features, functions, and system architecture your scheduling operation truly needs.
8. **Your current system isn't designed for event scheduling.** If you and your scheduling team have been limping along using a program like Outlook or even just a simple spreadsheet to manage your space, you and your customers deserve better.



Identifying and Addressing Objections

There are many benefits of switching to a leading-edge room and resource scheduling system, and for many organizations, many drivers behind making the move as well. Even so, you may encounter pushback if you decide it's time to recommend a change.

Some of the most common objections and the best way to respond include:

Objection	Response
"It's too much work to switch systems."	When you consider the hours you'll save every day going forward by using a system that greatly streamlines operations, the one-time, upfront investment of effort seems tiny by comparison.
"Learning a new system will be hard on our staff and our customers."	Learning your <i>old</i> system may have been challenging, but an advanced solution will have ease-of-use as one of its most important features.
"There is nothing else out there that does what I need it to do."	If you're getting by with the features of your current system, you'll be thrilled about the functionality available in a new system.
"It's too expensive. I don't have the budget."	Switching to a cloud-based solution with subscription-based pricing means you have no large, upfront investment and affordable monthly payments as an operating expense.

If you decide it's time to switch scheduling systems, knowing why people may be reluctant and how to overcome their objections can clear the way to getting your new solution implemented.



Cost Considerations

As noted above, switching to a subscription-based scheduling solution can provide significant cost benefits. However, as with any software transition, there are expenses you need to be aware of for budgeting purposes.

For example, your current software provider may charge you for providing you with your own scheduling data, so you'll want to look into that. There may also be a fee associated with canceling your contract early.

In addition, depending on who you choose as your new provider, there may be a data migration or conversion fee.

At Mazévo, we provide conversions from some scheduling systems to our solution free of charge. Plus, we believe that your data is yours, so we don't charge you to obtain it or make it difficult for you to export your information as needed.



5 Steps for Assessing Your Scheduling Solution Needs and Options

When you decide it's time to switch to a new scheduling system, there are five steps you should take to ensure that you find the right solution:

1. **Form a cross-functional team.** It's crucial that you get input from everyone who is affected by your scheduling operations. This includes your event planners and setup crews, of course, but it's not just limited to them. Even people who may never use the system, like third-party vendors, can provide insights on how the solution will address the product or service they provide.
2. **Request and record input.** In addition to group conversations with your cross-functional team, you should talk with each member individually to get their thoughts on your current system and processes and what improvements they feel need to be made. Too often, people with great ideas "yield the floor" to others on a committee who are more vocal. (**Note:** See below for a helpful list of questions for generating feedback.)
3. **Group and analyze the feedback.** The contributions you get from team members will naturally fall into groups. For example, some comments may be communications-related, like how the organization can handle requests more effectively (see the [Mazévo Ultimate Guide to Meeting Room Requests](#)), while others might be focused on pricing and billing issues. Consequently, the first step in analyzing the feedback you receive should be properly organizing and categorizing it.
4. **Identify and prioritize "must have" features.** Certain functions referred to by team members will be necessities—without them, you won't be able to run your scheduling operation effectively (or at all, in some cases). Review the input you receive to find these items and then, even among these mission-critical features, rank them from most to least important. This will help you assess software providers and their offerings.
5. **Evaluate vendors.** Once you have a good understanding of the needs of all your stakeholders, it's time to do in-depth research on all the candidate companies that offer a scheduling product that appears to have potential. This should be a comprehensive review that includes everything from product architecture and functionality to the background and experience of the company's key decision makers.



Questions to Ask Stakeholders About Your Current System and Processes

When talking with stakeholders about a new scheduling solution, there are a number of questions you should ask them about your current system and processes. Getting clear and complete input is essential to finding a replacement that will meet the needs of people throughout your organization as well as individuals outside it who will be affected by your selection through their interactions with your team.

High-level introduction

- Who are the stakeholders for the current system?
- What does each want, generally speaking, from the system?

Scheduling processes

- What works well with your current system?
- What does not work well with your current system?
- What are areas that can be improved with your current processes?
- Who can access the system?
- Are there any access limitations that are inconvenient for users?
- How long, on average, does it take to process a typical request?
- How do you measure the success of your scheduling processes?

Goals and planning

- What do you want to achieve with a new solution?
- Who will take ownership of the system?
- What are some short-term goals you want to achieve with a new solution?
- What are some long-term goals you want to achieve with a new solution?
- How many requests do you receive through an online interface versus phone or email?
- How can you encourage more self-service, online requests?
- How could you improve customer service in general?

System features

- What features in the current system are critical to your work?
- What features in the current system are nice to have but not essential?

- What features does the current system not have that you want or need?
- What processes seem too hard to use?
- Indicate the features/functionality below that you use, and describe how important each is to you:
 - Request forms
 - Adding new events
 - Finding and editing events
 - Communication (confirmations, emails, etc.)
 - Approval process
 - Billing and invoicing
 - Managing services
 - Managing resources
 - Reporting

Ease of use

- How complicated/intuitive is the interface on a scale of 1 to 5 (5 being Very Intuitive)
- How difficult/easy is it to train new users on the existing system on a scale of 1 to 5 (5 being Very Easy)?
- Does the system have tools and/or reporting to assist all these types of users: requesters, event planners, approvers, operations staff, upper management?
- Is the system's security easy to implement and maintain?

Integration capabilities

- Does the system allow single sign-on?
- Does the system integrate with digital signage?
- Does the system integrate with an academic scheduling tool?
- Are there other integrations that are important to your work and are they possible with the current system?

Company

- Is scheduling software the current provider's sole focus?
- What's the experience level of their staff in the scheduling industry?
- Does the provider strive to understand your specific needs?
- What's it like to work with the provider according to current customers?

- How are technical questions handled?
- How are user questions handled?
- Is it necessary to have a “ticket” created and then wait for a response?

System updates

- How frequently are system updates released?
- Do updates contain significant enhancements or minor tweaks?
- How are updates installed and how much time does the updating require?
- Does your IT department/provider have to install updates?

Technology

- What platform does the system use?
- Can it be accessed with a Mac?
- Can it be accessed with a Windows computer?
- Can it be accessed with iOS devices?
- Can it be accessed with Android devices?
- Are you able to work effectively and securely from home?
- Do you need to use a VPN?
- Do you need to use a remote desktop solution?

The answers to these and other questions you may have will help you select a solution that is ideal for your environment.



How to Ensure a Smooth Transition

You've found the scheduling solution you want. Now what?

Trying before you buy

You wouldn't purchase a car without driving it first. The same should be true of your new scheduling solution. At Mazévo, we strongly encourage potential customers to try the system for a period of time so they can be sure it will work for them. We'll even convert data from some systems free of charge and with no obligation so that current users of that system can get a good feel for how our solution compares. For users of other scheduling tools where we can't convert the data, we can set up a “sandbox” environment for people to work in.

Once the order has been placed for a new scheduling solution, it's important to have a plan for making a smooth transition from the old system to the new. Your transition plan should include:

Naming a project owner

The first step in your transition plan should be naming an "owner" for the project. While that title sounds like it probably comes with a long To Do list, it really doesn't. For the most part, the owner is just responsible for ensuring that key tasks get completed and that everyone is on the same page during the transition. The role isn't particularly time-consuming or stressful.

Talking with IT

While using a cloud-native scheduling system like Mazévo means you will require little if any assistance from your IT department, it's still a good idea to talk with them about making the switch to the new system and what becomes of the old system and its data.

Converting or migrating your data

Another important part of your transition plan is deciding whether you want to convert data from your current system or migrate data. Conversion is a process in which data from the old system is automatically recreated in the new system. While a certain amount of review and clean-up is typically required after a conversion is completed, most of the "leg work" is done for you.

For example, with a conversion, data can be converted into the format used by Mazévo, and then all you have to do is fine-tune it a bit and you're good to go. We perform that process free of charge, and it includes your core configuration items (rooms, resources, event types, statuses, etc.) plus all future bookings and one year of historical bookings. Best of all, conversions can be completed remotely in just a few days.

Data migration is a more manual process. You identify the information you need in the new system and rekey it there. While we don't perform migrations for our customers at Mazévo, we do provide guidance on how to maximize the efficiency of the process.

Training users

A thoughtfully designed system with an intuitive user interface will require very little formal training. However, taking users on a quick tour of the system and discussing how it supports your scheduling processes can help them get productive more quickly.

Sharing information with your customers

Whether they are people within your organization or outside it, the individuals who hold events in your facilities should be informed about your new system and any ways that it will affect processes that they are familiar with.



Switching to Mazévo: Case Studies

Large Church Case Study

4278 bookings per year 52 Rooms
Time to Implement 1 day

SPC is a large church in the Atlanta Metro area. Like other non-profits, their rooms are used heavily for meetings and events, but they rarely charge for space. For almost 20 years, they had used a scheduling system with most of the features they needed, but it was still hosted and maintained by the church's outsourced IT provider. It also was no longer being updated by the vendor, and they felt it was only a matter of time until it was completely unsupported.

Over the years, they looked for other scheduling software systems in the cloud and accessible from anywhere. Each time they found those systems lacking. While many of the solutions scheduled rooms and resources, most of them were either hard to use or lacked critical features like combo rooms or the ability to provide room setup reports for facilities staff.

Mazévo offered a modern and user-friendly alternative with all the features they needed. The concern was how difficult it would be to switch. With over 82 bookings per week, it would be no small undertaking to manually re-enter and migrate all of those bookings into the new system. With only one staff member available to enter data, this was not a workable option. The solution was to use Mazévo's data conversion services. With a data conversion, all their existing bookings and scheduling data, customer information, and room setups were moved into the new system with less than one day of downtime. A couple of one-hour remote onboarding sessions followed, and the church was fully up and running on the software.

Higher Education Case Study

73 Rooms 41 Resources
Time to Implement 3 Days

A satellite campus of a large southern US public research university had been struggling for years with managing their events using spreadsheets and classroom scheduling software. They needed to automate their reservation process with a modern event management system. The small event services department with three staff members is a full-service operation for both on-campus and external groups. They generate revenue for the university by renting out rooms and providing event services.

With the onset of COVID-19 shutting down their event operation and the need to increase revenues once events could resume, they knew adding more staff would be out of the question, and they needed a system to assist. Mazévo became the ideal choice since it could manage all the scheduling, event details, and billing in one place. It could also be implemented quickly, even if they previously didn't have a system.

Over three days and two one hour onboarding sessions, they were able to fully configure their system, including entering all rooms, resources, and pricing plans. Another onboarding session followed a week later on how to add future events into the system.



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Get a Personalized Online Demo of Mazévo

Whether you're actively evaluating scheduling solutions or simply want to understand what your options are in case the decision is made to switch systems down the road, a personalized demo of Mazévo can be very enlightening. You'll get details about the system's web-native architecture, powerful features, and user-friendly interface in a session focused on your specific needs.

Visit gomazevo.com to learn more about the system and schedule a demo.