

Guest Incident Tracking

Business Problem

Although Guests are forthcoming about unsatisfactory or dissatisfied experiences on-property, data has not been captured in a way that would enable this data to drive satisfaction.

MVC lacks an accessible, data-driven solution to the biggest pain points and has partnered with Katana Software, Makers of Asgard, to achieve the following goals:

- Consistent, standardized capture of complete Guest and Incident data, including access to relevant information about related Work Orders, Actions Taken, and Compensation
- Workflow management tools to route incidents for optimum, traceable resolution
- Proactive, above-property research tools to identify trends and plan for arrivals
- Comprehensive enterprise-level trending/analysis of incidents, causes, and compensation/outcomes

Quantifiable Goals

Guest Satisfaction

Raise key scores:

- Improvement in “Problems Experienced” scores
- Improvement in “Problem Resolution” scores
- Improvement in Overall Satisfaction

Costs

Impact key metrics:

- Reduction in repeat Guest Compensation
- Reduction in preventable guest dissatisfiers
- Reduction in Staff Labor Hours/Dollars researching and reporting

Qualitative Goals / Expected Project Outcomes and Deliverables

- Create a dataset to drive standardization of compensation outcomes
- Analyze Incident relationships with work orders, staff, and other operational variables (including preventive maintenance)
- Identify Actionable Operational trends (problem spots/opportunities)
- Improve process visibility and outcomes
- Further the vision of “one company” with universal data resources

Project Milestone 1 - Minimum Viable Product/Pilot

What's Included in Asgard v2.10.0?

This is a Beta test, sometimes referred to as a pilot or user acceptance testing, that is only accessible to MVC. The available tools are fully functional and ready for field testing. Your feedback will be used to determine readiness and/or needs for full roll-out.

Permissions

We have added the following new controls to access Guest Incident Tracking:

- **Prototype Flag for Guest Incident Tracking** - Turns the functionality “on” or “off” at the organization level. This control is operated by the Katana/Asgard staff.
- **User-level access flag** - Turns on the functionality for an individual user at the site level. This control is operated by organization admins (e.g. Rooms and Related team members) or Katana/Asgard staff. This flag both controls whether the user is able to see/edit Guest Incidents and determines who shows up as a Guest Incident Assignee.

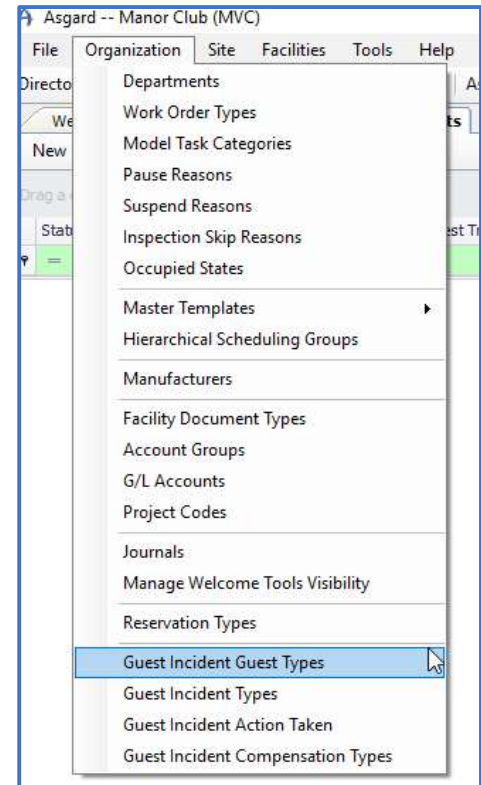
Organization Admins automatically have access to this functionality, when it is enabled in their organization.

Organization-Level Configurations

One of the goals of the project is to support enterprise-level standardization. The following new configurations/assets have been added to the Organization menu.

Note: These items are used on Guest and Incident screens (visible to users with Guest Incident Access) but are only editable by Organization Admins

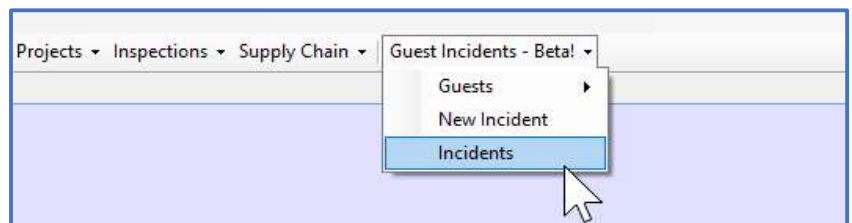
- **Guest Incident Guest Types** - A list of the types of Guests that will be used to Group major demographics (e.g. Owner, Exchanger)
- **Guest Incident Types** - A list of Incidents and their corresponding Departments to be available in the Create Incident screen for users to select from a drop-down menu.
- **Guest Incident Action Taken** - A list of Actions Taken to be available on the Incident Details screen for users to indicate recovery actions.
- **Guest Incident Compensation Types** - A list of Compensation options to be available on the Incident Details screen for users to indicate the type/value of restitution offered.
- **Departments** - The Departments available on Incidents originate with the same list currently used for Work Orders. This is an organization-level list.



Menu Update

The new Guest and Incident functionality is visible when enabled for an Organization AND user.

Users without permissions do not see this new option, even if it is enabled at the organization level.



Guests

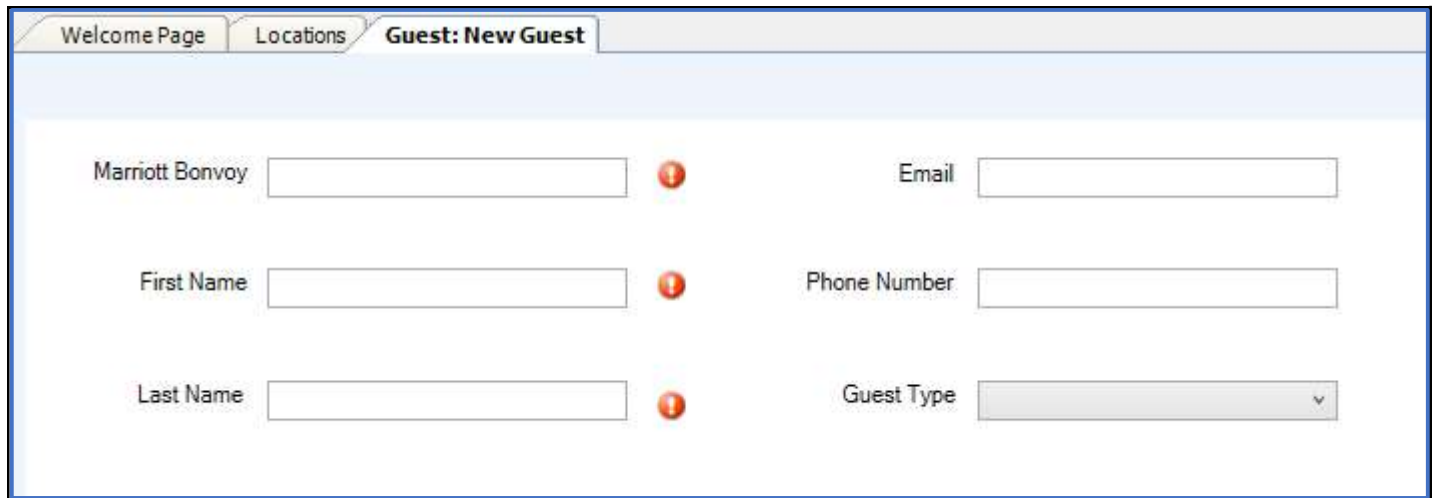
Key Things to Know

- Guest is a generic term referring to any type of Guest, including Owners, Renters, and Exchangers.
- The Guest List is universal - A Guest created at one MVC property becomes visible at all properties.
- Guest Details, including email and phone number, are editable both during and after creation.
- For security reasons, the Guest list cannot be exported or printed from Asgard.
- The Guest List is available on Incidents, as a convenience feature.

Create a New Guest

Guests can be created on their own, or during the creation of an Incident.

To create a new Guest, open Guest Incidents - Beta! > Guests > New Guest



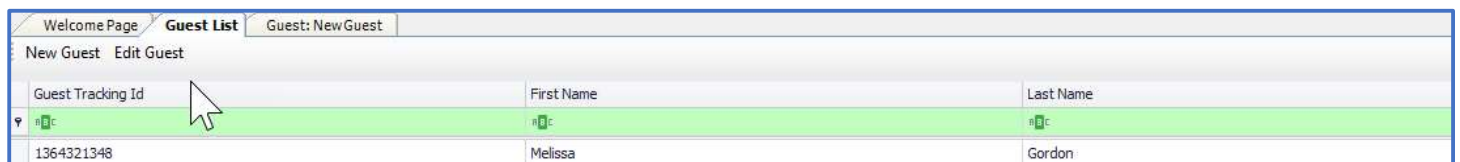
Fields marked with a red exclamation point are required to create the new Guest. If you don't know the exact details, enter your best guess - this information remains editable!

- The **Marriott Bonvoy** field accepts letters, numbers, and spaces. If you don't know the Guest's ID (or they don't have one), enter their phone number. This number is checked for duplicates in the system when you click Save. If you also don't know the Guest's Phone Number the last resort would be Last Name and Room Number.
- **First Name and Last Name** are required.
- **Email** is not required but highly suggested.
- **Phone Number** is not required but highly suggested.
- It is understood that **Guest Type** may change over time. At the time that an Incident is created, the current Guest Type is saved on the Incident. There are just two types, Owner or Non-Owner. In the future, additional fields will be added to track ownership level (on the Guest) and reservation type (on the Incident).

Once all fields have been populated, click **Save** or **Save/Close** in the upper right-hand corner.

View the Guest List

To view the Guest list, open Guest Incidents - Beta! > Guests > Guest List



Guest Tracking Id	First Name	Last Name
1364321348	Melissa	Gordon

From this screen, you can also create a New Guest or Edit Guest.

Incidents

Key Things to Know

- Incident Tracking is intended for the management of recovery/satisfaction events, not guest preferences.
- The Active Incident list in Asgard is location-specific. If you are logged in at a site, you will see only that site's open Incidents. The Asgard Incident list in the Analytics Portal is enterprise-wide.
- Incidents are attached to Guests and Locations.
- In the future, you will be able to add multiple Incident Types/Locations to a single Incident. Presently, you are limited to creating a single Incident Type/Location per Incident. Multiple Incidents can be open simultaneously, for the same Guest/Location.
- Incidents can be Closed - Resolved or Closed - Unresolved, depending on whether the Actions Taken and Compensation were adequate to achieve Guest Satisfaction.
- An Incident cannot be closed until it has been assigned and updated with at least one Comment.
- All changes to Incidents are Logged.

Create a New Incident

To create a new Incident, open Guest Incidents - Beta! > New Incident

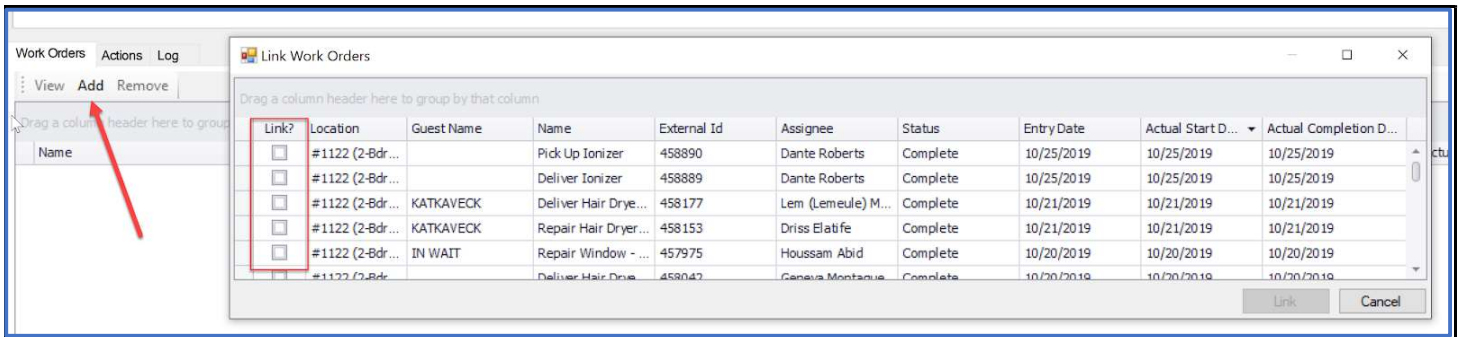
- Required - Select a **Guest** from the drop-down menu or select New Guest. Note: the Guest carries the contact information, not the Incident. There is no need to re-enter this information, as it will show up in the Incident details. If the Guest hasn't previously been added to the system, you can click "New..." to launch a window to add the Guest now.
- The **Guest Status** is populated with On-Property/In-House by default but can be updated.
- The **Guest Type** is populated from the Guest record and cannot be changed.
- The **Incident Source** is populated with Guest On-Property by default but can be updated.
- Required - Select the **Guest Location** (i.e. their assigned unit).
- Required - Select the **Incident Location**, which may or may not be their Unit. For example, if the Incident happened at the Pool Bar, you would indicate that here.
- Required - Select the Incident **Type** from the drop-down list. The Type list currently includes Department and Category information. You can type in any part of this information to filter the list.
- Optional - Select the **Assignee** if you already know who will work on this Incident. This field is Optional.
- Required - Add all known details about the Incident in the **Description** field.
- Optional - You can add related Work Orders during creation. See the next section for instructions.

Add Work Orders, Actions, or Comments

After an Incident is created, you can add or update related Work Orders, Actions, or Comments.

Work Orders

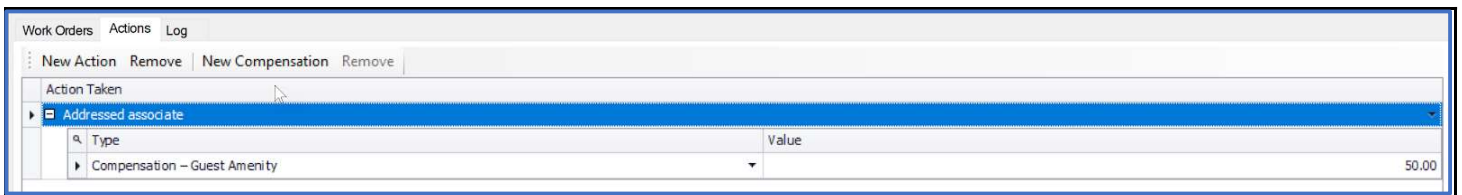
Work Orders that are currently open, or were closed in the last 30 days, at the Guest Location or Incident Location can be linked to an Incident. This is helpful if a Work Order is/was required to resolve the issue, or if the Incident was the result of a Work Order service interaction.



Click Add, to initiate the look-up and link process. Add one or more work orders by clicking the Link checkbox and click Link to attach. Note: You must **Save or Save/Close** the Incident to finalize these changes.

Actions (and Compensation)

Multiple response Actions can be added to an Incident to track the effort(s) required to recover Guest Satisfaction.



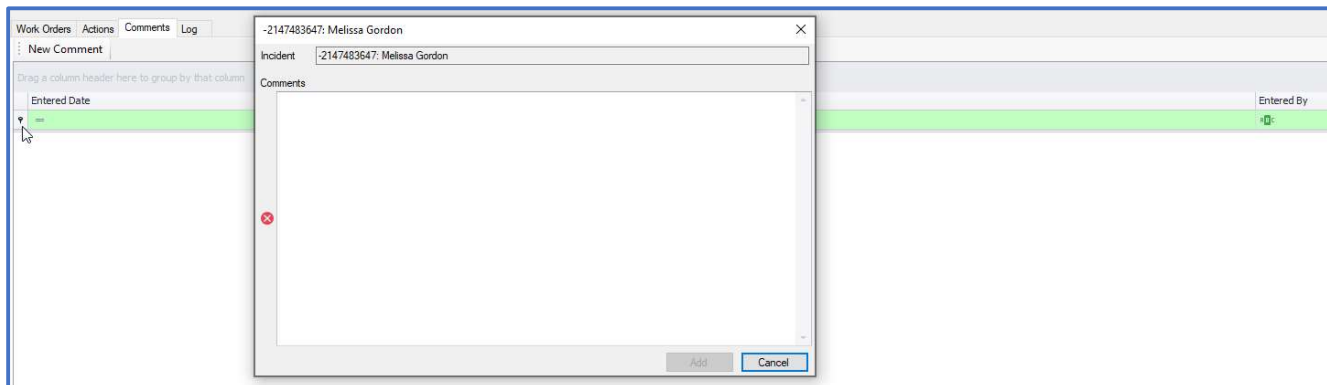
Multiple Compensation Types and Values can be added to each Action for tracking, trending, and reporting.

To **add Actions Taken**, select **New** and then **choose an option** from the drop-down. To **add a Compensation Value**, click in the box and **type the number**. Click **Enter or Tab** to complete the addition.

Note: You must **Save or Save/Close** the Incident to finalize these changes.

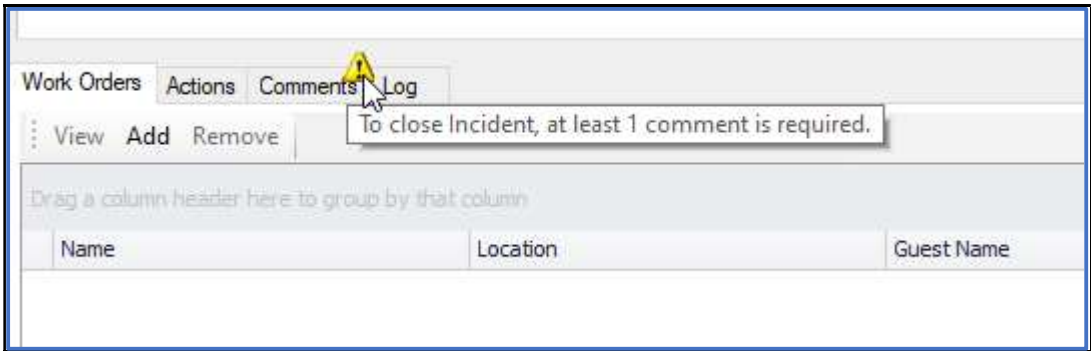
Comments

Multiple Comments can be added to an Incident, to track updates such as Guest outreach/communications, research, or other inter-team information.



Each Comment is automatically “stamped” with the time and date and person making entry for traceability.

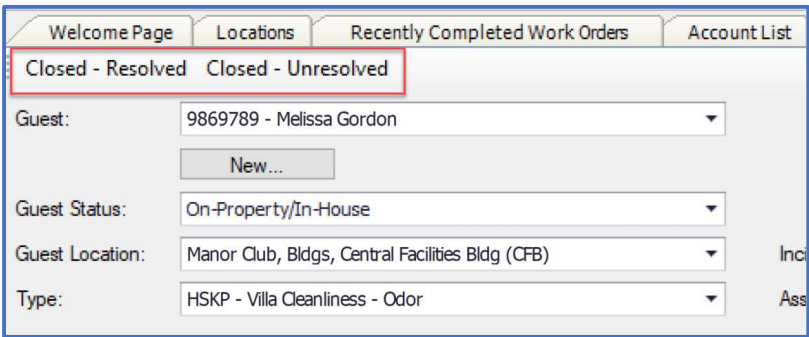
At least one Comment is required, along with assigning the Incident, to complete the Incident.



Close an Incident

Incidents can be **Closed - Resolved**, if the Actions and Compensation have been adequate to restore satisfaction, or **Closed - Unresolved** if no further action will be taken.

Again, to Close an Incident, it **must be assigned** and **have at least one Comment**.



View the Incident List

To view the list of Active Guest Incidents, open Guest Incidents - Beta! > Incidents

From this screen, you can access the New Incident and Edit Incident functions.

Welcome Page Active Guest Incidents						
New Edit						
Drag a column header here to group by that column						
Entered Date	Guest Incident Type	Marriott Bonvoy	Guest Name	Guest Status	Guest Location	
11/19/2019 9:45...	HSCP - Villa Cleanliness - Pest	9869789	Melissa Gordon	On-Property/In-House	Manor Club, Bldgs, Phase 2, Colonial ...	

Coming Soon!

Here is a summary of our current plans for enhancing this functionality.

Critical Features for Incident Creation/Management

- Recently Completed Screen
- Guest Level field

Workflow and Feature Enhancements

- Multiple Incident Types/Locations
- Refinements to Guest look-up during Guest/Incident create
- Establish a relationship between Guest and Reservations, based on ID
- Guest Mass Import format and arrival reporting
- Guest Incident Dashboards in Asgard
- Guest Incident Search in Asgard

Testing Support

For questions or concerns about Guest Incident Tracking, contact support@katanasoft.com.