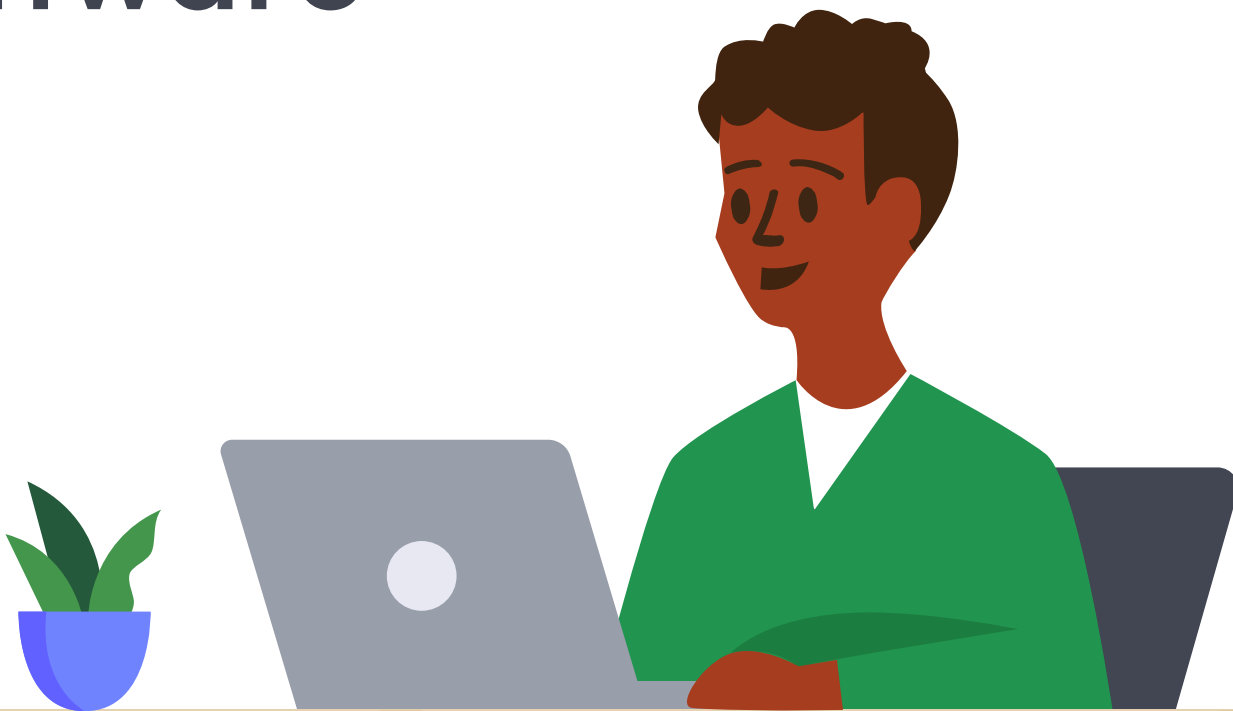


ENVOY BUYER'S GUIDE

The buyer's guide for workplace security software



Introduction

Workplace safety, security, and compliance are not one-size-fits-all by any means, but they are foundational pillars for all businesses. Whether or not you have an official security policy in place, your workplace security measures must be adaptable to the ever-changing regulations, technology, and security threats out there.

With many businesses adopting more flexible working methods and access control, such as temporary credentials, leaders must take a renewed focus on the needs of their employees and visitors onsite. It's never been more complicated to operate a workplace. Hybrid work makes it challenging to predict who's coming in and who's not.

The days when a simplistic, door-centric approach would suffice are gone. Physical security has evolved far beyond locks and keys. A dynamic visitor management system (VMS) has become the solution of choice for businesses trying to stay one step ahead of this evolving workplace landscape.

Are you confident your organization has the security set-up it needs this year?



Workplace security must-haves

People are returning to the office, whether they want to or not. By the end of 2024, 90% of businesses plan to [implement a return-to-office \(RTO\) policy](#). But that doesn't mean things will revert to the pre-pandemic era. Increased concerns over physical security have emerged. Whether it's keeping unauthorized people offsite or protecting the data of those onsite, businesses are updating their approach to workplace security in response.

The modern workplace demands a VMS solution that is dynamic and adaptable. One that extends beyond traditional door-centric methods to ensure that the people onsite are safe, accounted for, and actually supposed to be there. These solutions vary in sophistication and can include a range of key features and capabilities, including:

Access control

Access control is a physical security method that can help you control or limit access to a space. Traditional access control solutions can leverage physical keys, keycards, or fobs. But often, these conventional approaches can make it difficult to contend with modern threats and lead to more security vulnerabilities. They can also be costly to maintain, especially when it comes to changing locks or reissuing keys/cards in the event of security breaches.

Modern access control systems enhance and streamline workplace security. You can track workplace occupancy in real time, customize your access permissions, and integrate with other security systems to fortify your physical security.

Smart ID verification

The best visitor management solutions will have [smart ID verification](#) capabilities, which enable you to verify every visitor before they enter your workplace. This works by actively cross-referencing and auto-filling fields when a visitor scans their government-issued ID, such as a driver's license or passport.

ID verification can also help you comply with various regulatory requirements that mandate identity verification for access to certain areas or information. This can also help create a record of all verified individuals who have accessed your workplace.

Blocklists

A blocklist is a record of individuals who are barred from entering a facility. This list may include former employees, individuals with a history of disruptive behavior, or anyone deemed a security risk. When someone on a blocklist attempts to sign in, your VMS will automatically notify you. This can also be customized to meet the specific security needs of your organization, such as setting different levels of restrictions.

Network and IP security

A modern visitor management system can help you enhance network and intellectual property (IP) security in several ways. Some automatically grant [temporary guest Wi-Fi credentials](#) (which limit network access to verified individuals) and [digitally capture signatures on non-disclosure agreements \(NDAs\)](#) to safeguard sensitive information. [Approval workflows](#) can also ensure that only pre-approved visitors gain access. Ultimately, the right solution can safeguard against unauthorized access to your organization's network resources, protect sensitive data, and maintain compliance with data privacy regulations.

Workplace safety non-negotiables

Workplace safety is all about creating an environment where employees and visitors can always feel safe—even during emergencies. Careful planning and proactive measures are the key to this.

In case of an emergency, everyone impacted should be made aware, not just the employees based in the office. That means you need to instantly alert onsite vendors, interview candidates, or other visitors, as well as any remote or visiting employees. Equip everyone with the necessary resources to maintain safety. This can involve ensuring clear communication channels, access to critical safety information, and providing training resources for various emergency scenarios. Top visitor management systems should enable essential use cases, such as:

Emergency preparedness

Emergency preparedness in workplace safety involves strategic planning for quick and effective emergency response. Modern visitor management systems come equipped with features that can help establish safety protocols. These include:

- **Emergency notifications.** Multi-channel alerts for rapid communication to all people onsite.
- **Real-time visitor logs.** These give you an accurate view of who's onsite when an emergency occurs.

- **Integrations with other security technologies.** Security integrations streamline emergency responses by ensuring efficient coordination across various safety systems.
- **Comprehensive emails containing emergency protocols.** This feature allows you to send documentation about your company's emergency procedures to first-time visitors.

Safety protocols

Every workplace needs to ensure the safety of those onsite. And in many industries, not doing so—or lacking the documentation of doing so—is a massive liability. A VMS solution can assist in this process by enabling you to:

- Confirm employees have the required personal protective equipment (PPE).
- Incorporate safety videos into the pre-registration or sign-in process.
- Require visitors to sign waivers before entering your workspace.
- Track visitors and employees' vaccination statuses and test results.

Workplace compliance standards

Every security leader knows that adhering to the constantly evolving world of compliance standards is a painstaking process. It requires regular updates to corporate policies to ensure your business is in line with evolving international, federal, and state laws.

Non-compliance can lead to significant financial losses, operational disruptions, and damage to customer trust. Maintaining compliance is not just a legal necessity but also a smart way to protect your organization's integrity, operational continuity, and brand reputation. In fact, most leaders (73%!) believe that meeting compliance standards has positively changed how people see their businesses.

Below are four common compliance standards and what you need to do to adhere to each:

International Traffic in Arms Regulations

The International Traffic in Arms Regulations (ITAR) is a set of U.S. government regulations

that control the export and import of defense-related technology and services. ITAR is mainly relevant to businesses in the manufacturing industry.

Compliance entails registering with the Directorate of Defense Trade Controls, ensuring ITAR data stored in the cloud is not accessed by foreign entities, and implementing strict access controls. VMS solutions can help with ITAR compliance by enabling you to control and monitor access to facilities, ensure that only authorized personnel have access to sensitive areas, and maintain accurate records of visitors.

Occupational Safety and Health Administration

The Occupational Safety and Health Administration (OSHA) is a U.S. government agency responsible for ensuring safe and healthy working conditions. Compliance with OSHA is crucial for preventing workplace injuries, illnesses, and deaths and for avoiding legal penalties.

Businesses, particularly those in manufacturing, must comply with OSHA regulations. This entails adhering to their safety standards, providing adequate employee training and resources, storing personal data securely, and maintaining a safe workplace environment. VMS solutions can help you uphold and prove compliance in a variety of ways. This includes informing visitors about safety guidelines, enabling digital document signing, verifying health information, and tracking onsite employee presence, all while protecting personal information.

General Data Protection Regulation

The General Data Protection Regulation (GDPR) is a comprehensive data protection law in the European Union (EU) that sets guidelines for collecting, processing, and storing personal data. All businesses that process the personal data of EU residents, regardless of their location, must comply with GDPR. For businesses, this involves:

- Obtaining explicit consent for data collection.
- Ensuring data security.
- Reporting data breaches promptly.
- Upholding individuals' rights to access and control their data.

A visitor management system can assist businesses in GDPR compliance by asking visitors to consent to data collection, anonymizing visitor data, securing visitor information, and ensuring transparency in data processing.

California Consumer Privacy Act

The California Consumer Privacy Act (CCPA) is a state statute intended to enhance privacy rights and consumer protection for California residents. Businesses that handle personal data from California residents, regardless of their physical location, must comply with CCPA. Compliance involves:

- Transparent data handling practices.
- Responding to consumer data access requests.
- Implementing measures to protect consumer data.

VMS solutions can aid businesses in CCPA compliance by securely managing visitor data, ensuring transparency in data collection and usage, and enabling responses to consumer data requests.

Do you have a workplace in California?

In California, [Senate Bill 553](#) requires employers to develop workplace violence prevention plans as part of California OSHA and Illness Prevention. This involves creating strategies and protocols to prevent and address any instances of violence in the workplace. Further, if a company also operates in other states, it may need to implement similar or comparable workplace violence prevention plans across all its locations—even those outside California—to ensure consistency and compliance.



What to look for in a visitor management system

There are many low-cost point solutions available in the market at the moment. While that might sound like a net positive, most lack the comprehensive features and integration capabilities needed in today's climate. The wrong solution can actually lead to more security vulnerabilities, non-compliance with regulations, and a poor visitor and employee experience.

A traditional visitor management system can handle visitor check-ins at your workplace. On the other hand, a modern VMS solution can also track your visitor check-ins and give you access to critical features (e.g., integration capabilities, real-time tracking, and robust data protection) that enhance workplace safety and efficiency.

When shopping for visitor management solutions, you should consider the following:

1. Maintaining security in all your office locations

A VMS with robust security features safeguards against unauthorized access and ensures compliance with the right regulations. Some features to look for include:

- **Visitor Identification.** A VMS should enable you to display key information on visitor badges beyond just their name, like the host's name, reason for visiting, photo, and/or company.
- **Visitor Tracking.** Your team should always have access to real-time visitor information and have the option to choose which data points to capture, display, and store. Also, make sure to determine the length of time your team will need to store this data.
- **Reporting.** Determine your needs for visitor information, including whom to share it with and the frequency. Reporting capabilities should also cater to compliance audits and emergency situations.

2. Keeping your workplace running efficiently

The right solution should improve the efficiency of all your workflows, whether it's streamlining your visitor check-in process or reducing administrative burdens. Here are a few features to look out for:

- **Self Check-In.** A VMS should offer an easy way for visitors to check themselves in, complete any required security screening, and automatically verify their identity.
- **Self Check-Out.** To paint an accurate picture of who's onsite throughout the day, your VMS should enable visitors to sign out as easily as they signed in.
- **Group Check-In.** If you have a high volume of visitors or frequent visiting groups, your visitor management system should be able to securely check in groups of individuals without creating a bottleneck in the lobby.
- **User-Friendly Interface.** It's important to keep your employees and visitors in mind when evaluating VMS solutions. The platform you choose should be intuitive, easy to use and not require endless, complicated training sessions to master.

3. Enabling you to scale as your business evolves

The right VMS solution should be able to account for your organization's evolving needs and be dynamic enough to address them. Manage multiple locations, establish an RTO strategy across several cities and countries, and/or integrate with your other tools—all in one dashboard. Some key capabilities include:

- **Deployment Options.** Look for a cloud-based system that offers automatic updates and easy template duplication for new locations.
- **Multi-Location Management.** A VMS should allow for different management styles across multiple locations. This might be global admins at HQ or smaller teams for individual sites. It should adapt to varying regional regulations and requirements.
- **Centralized Administration.** More advanced systems automate administration at scale. For example, you can automatically create and delete access by integrating with your company directory (e.g., [OneLogin](#), [Microsoft Azure](#), or [Okta](#)).





Security must-haves



Small business

<50 employees

- ✓ Visitor identification
- ✓ Visitor tracking
- ✓ Self check-in
- ✓ User-friendly interface

Growing business

50–200 employees

- ✓ Visitor identification
- ✓ Visitor tracking
- ✓ Self check-in
- ✓ User-friendly interface
- ✓ Reporting
- ✓ Multiple ways to sign in*

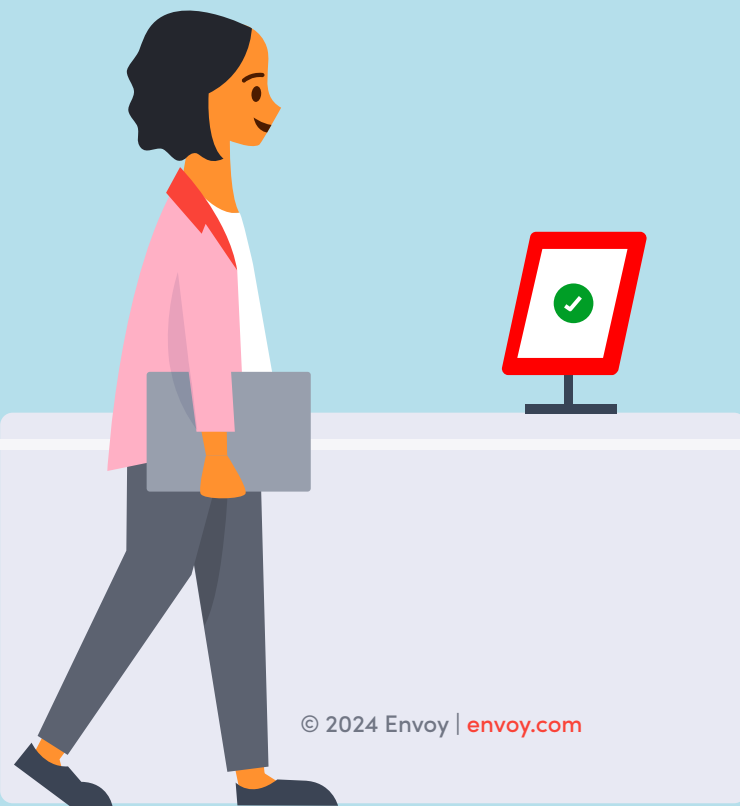
**e.g., QR code, touchless, mobile app, kiosk, and facial recognition*

Mid-sized business

- ✓ Visitor identification
- ✓ Visitor tracking
- ✓ Self check-in
- ✓ User-friendly interface
- ✓ Reporting
- ✓ Multiple ways to sign in*
- ✓ Self check-out
- ✓ Group check-in
- ✓ Deployment options

Enterprise business

- ✓ Visitor identification
- ✓ Visitor tracking
- ✓ Self check-in
- ✓ User-friendly interface
- ✓ Reporting
- ✓ Multiple ways to sign in*
- ✓ Self check-out
- ✓ Group check-in
- ✓ Deployment options
- ✓ Multi-location management
- ✓ Centralized administration
- ✓ Emergency alerts
- ✓ Virtual reception capabilities



Top considerations when evaluating a visitor management system

Several key aspects need your careful consideration to ensure they align with your business's specific requirements.

Collecting information from visitors

A critical function of a visitor management system is the collection and storage of visitor information. You most likely have an up-to-date directory of employees' essential information. But what about your guests? Essential data includes contact details, company affiliation, and the purpose of the visit. For enhanced security, consider collecting health attestations, signed agreements, or details of recent international travel. For compliance, collect information on whether they have completed the right training or signed the correct documents before arrival.

A VMS should offer a secure (and seamless) way to store and manage all visitor information, with features like data anonymization, role-based access, and data retention policies.

Questions to ask

- Does the VMS allow me to capture all required information from every visitor?
- Can I give visitors an option to opt out of providing information?
- How does the VMS help securely store the visitor information I collect?
- How can I keep visitor records up-to-date and accessible in case of an audit?

Knowing who's onsite at all times

It is crucial to maintain an up-to-date record of everyone who enters your facility. Look for a VMS that can identify when visitors have left, via features such as automated sign-out. In emergencies, the ability to quickly locate visitors and their hosts is vital.

Consider solutions that facilitate visitor check-ins at unstaffed reception desks—using kiosks or QR codes—to maintain security standards across all locations.

Questions to ask

- Does the VMS enable me to identify when visitors have left?
- With the VMS, can I quickly locate visitors during an emergency?
- Can I check in visitors at an unstaffed reception desk with the solution?

Managing access to your workplace

Effective visitor management involves controlling access to your facility or workplace. This can include setting capacity limits, managing invite approvals to prevent overcrowding, and ensuring that each entry point has a check-in system. You can also restrict access, with the ability to exclude visitors based on specific criteria, such as appearing on a blocklist or failing to meet entry requirements.

Questions to ask

- Can the VMS solution adapt to different office sizes and varied RTO policies?
- Can I control the number of visitors that enter the facility or a particular area?
- Is there a way to flag unwanted guests before allowing them entry?

Integrating with your other security tools

Integrations and an [open platform VMS](#) are essential to future-proofing your workplace tech stack. A VMS that integrates with your existing security systems—such as email invites, digital NDAs, access control systems, RFID access cards, and mobile QR codes—can not only unlock new capabilities of these tools but also automate your workflows. These integrations can help you make your workplace more secure and create a more seamless experience for employees and visitors alike.

Questions to ask

- What types of security technologies can the system integrate with?
- Can the VMS integrate with my existing secure file storage system?
- Does the system have integrations that support touch-free arrivals and departures?



Key questions to ask when evaluating VMS solutions

Data collection capabilities

- ☐ Does the VMS allow me to capture all required information from every visitor?
- ☐ Can I give visitors an option to opt out of providing information?
- ☐ How does the VMS help securely store the visitor information I collect?
- ☐ How can I keep visitor records up-to-date and accessible in case of an audit?

Real-time visibility

- ☐ Does the VMS enable me to identify when visitors have left?
- ☐ With the VMS, can I quickly locate visitors during an emergency?
- ☐ Is there a way I can contact onsite visitors in the event of an emergency?
- ☐ Can I check in visitors at an unstaffed reception desk with the solution?

Restricting access at the workplace

- ☐ Can the VMS solution adapt to different office sizes and varied RTO policies?
- ☐ Can I control the number of visitors that enter the facility or a particular area?
- ☐ Is there a way to flag unwanted guests before allowing them entry?

Security integrations

- ☐ What types of security technologies can the system integrate with?
- ☐ Can the VMS integrate with my existing secure file storage system?
- ☐ Does the system have integrations that support touch-free arrivals and departures?

Navigating your path to enhanced workplace security

Now, as you step into the market, armed with knowledge and insights, remember that the right visitor management system should not only align with your current security needs but also be adaptable to future changes and challenges. Whether it's enhancing visitor management, improving emergency preparedness, or ensuring compliance with evolving regulations, the ideal system will be your ally in creating a safe, efficient, and compliant workplace.

Now that you know what to look for in a VMS, see how Envoy Visitors can help your organization bolster security and experience. Head to envoy.com to start your free trial, or contact our sales team at (877) 652-2808 for more information.



About Envoy

Envoy's workspace platform has redefined how companies manage modern workplaces. 16,000 workplaces and properties around the globe rely on Envoy's fully integrated solution to create an unrivaled first impression, keep spaces secure and compliant, and solve common and complex workplace challenges. From multi-tenant buildings and corporate headquarters, to labs, production sites, and factory floors, Envoy powers the places where people work best together.