



Shifting Attitudes Towards Cleanliness and Ongoing Disinfection



ACTION
UNLIMITED RESOURCES

Table of Contents

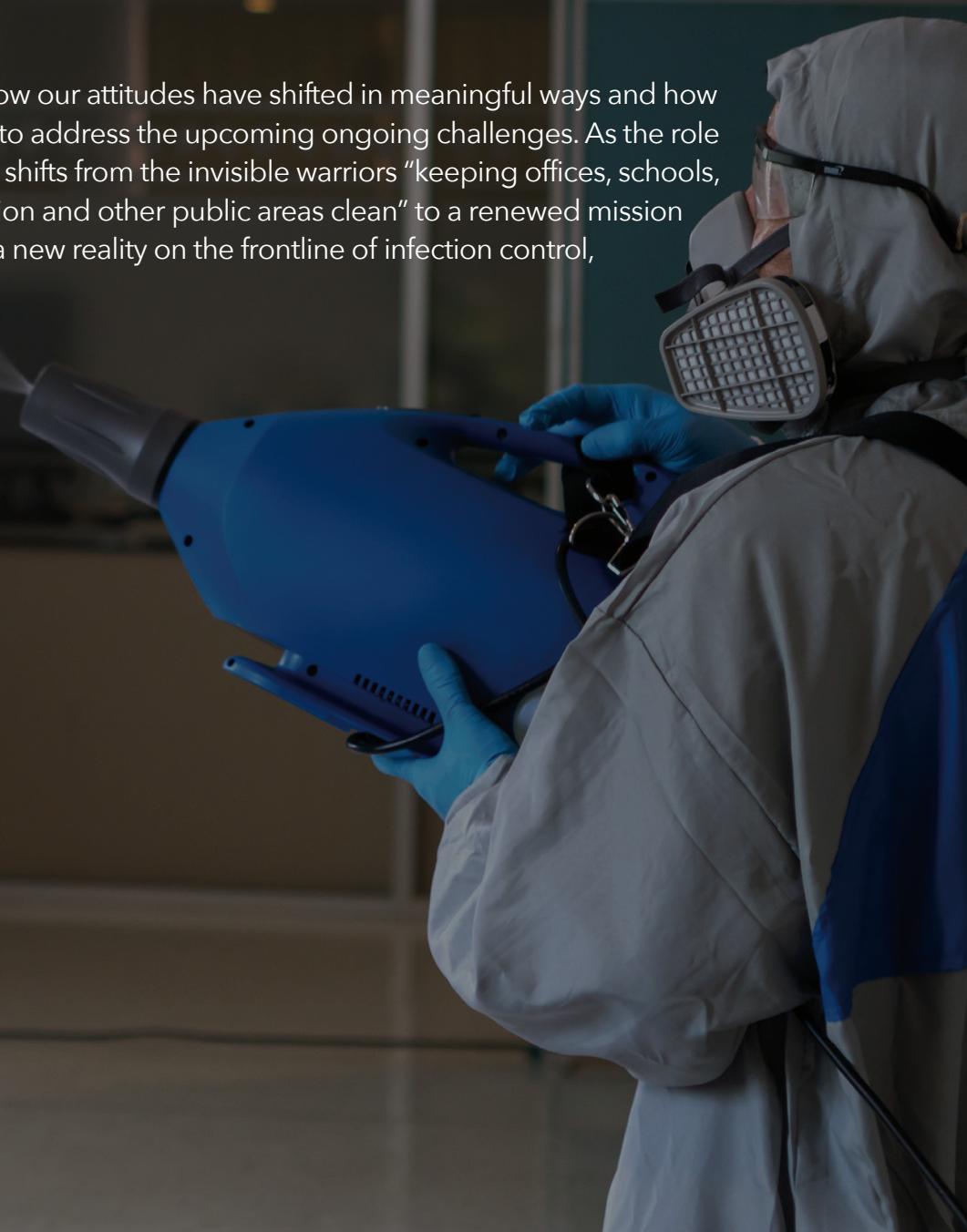
| | |
|--|----|
| Overview | 3 |
| Viewpoint #1: Training, Training, and More Training | 5 |
| Viewpoint #2: How Training is Delivered is Just as Important: A Tale of Two Formats | 6 |
| Viewpoint #3: Shifting Conversation About Cleanliness and Disinfection | 8 |
| Viewpoint #4: Importance of the Job: Meaningful Work, and Industry Perspective | 9 |
| Viewpoint #5: Policy Debate: What Are the New Rules? | 10 |
| Conclusion | 11 |



Overview:

We are in a rare moment in history not only for our industry and our country. Our entire world has shifted overnight to accommodate a global pandemic that has impacted businesses, families, and entire communities. As the urgency and immediacy of the outbreak starts to subside, and reopening plans are phased in, we wanted to understand how the country's attitudes have shifted towards cleanliness and disinfecting processes, procedures, and products. When we started discussing the idea of a survey research study, the COVID-19 outbreak was a brief headline that was mostly overseas. Little did we know that a few short weeks later, it would hit our shores and transform in meaningful ways our very lives. With that, we had to shift how we approached this study, the questions we asked ourselves as well as participants.

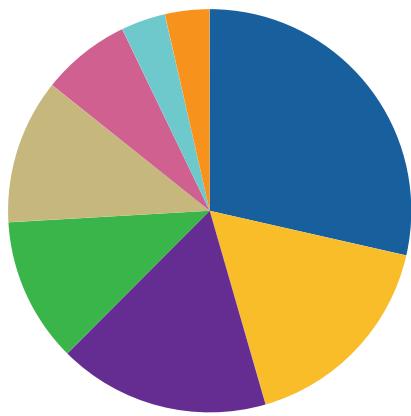
This study seeks to understand how our attitudes have shifted in meaningful ways and how the Jan/San industry can change to address the upcoming ongoing challenges. As the role of people in the Jan/San industry shifts from the invisible warriors "keeping offices, schools, restaurants, hospitals, transportation and other public areas clean" to a renewed mission critical responsibility addressing a new reality on the frontline of infection control, now and into the future.



Our Methodology:

We utilized a combination of data we were able to source, in-depth interviews, and expanded survey of many participants who have a role in keeping micro-environments clean on an ongoing basis.

- Custodial Services
- Distributor
- Manufacturer
- Contractor
- Supplier
- Manufacturer Representative
- Environmental, Health and Safety Services
- In-house provider



- Manager
- Sales
- CEO
- Owner
- Regional
- Vice President
- Director
- Facilities
- President

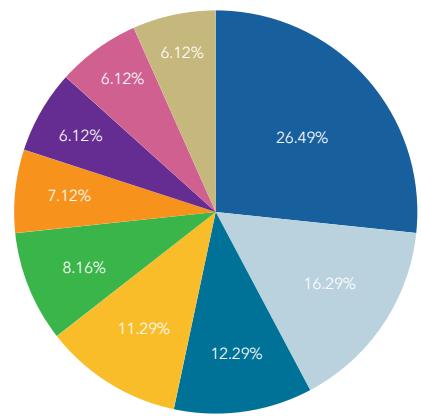


Chart 1: What Sector of the Jan/San Industry Do You Represent?

Participants from all areas of the Jan/San industry were included in the study in order to gain a broad viewpoint: suppliers, manufacturers, sales reps, clients, and contractors.

Chart: Titles of Research Study Participants

With a broad range of sector participants, it was equally important to obtain participants from a range of job positions to participate. As the chart indicates, our sample included C-level executives all the way through field positions within the Jan/San industry.



Viewpoint #1: Training, Training, and More Training

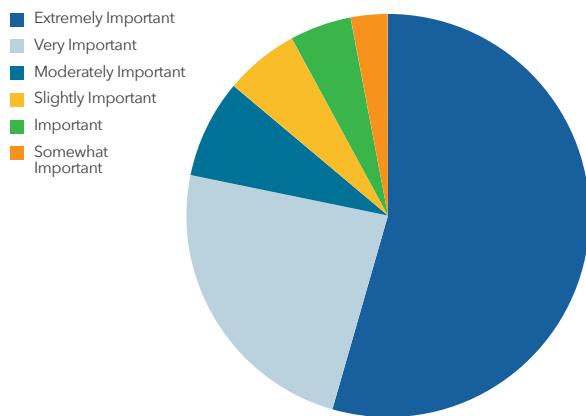


Chart: How Important is Ongoing Training in the Cleaning Services Industry?

It may or may not be a surprise to find that over 79% of survey participants indicated that ongoing training was either **EXTREMELY IMPORTANT** or **VERY IMPORTANT** in the cleaning services industry. We'll take a look at how this has shifted post COVID-19. Let's look at the reasons why.

"I feel like I have worked with many manufactures - the best ones are the ones that really have gone to great lengths to help educate me."

Jan/San Research Participant

Several participants indicated a connection between industry consolidation, downward pricing pressure, a tendency for a revolving door for employees and the lack of ongoing coordinated training efforts as contributing factors to not providing a systematic approach to training frontline workers. As many janitorial and facilities departments are constrained by the same budget pressures, many departments are squeezed to get more performance from smaller teams. With the enormity of the job at hand, keeping surface borne infections from transmitting to humans, it becomes critically important for Jan/San and facility managers to provide consistent, ongoing, coordinated, training with up to date technology to ensure products and procedures complete their desired outcome...to kill surface borne infectants before they are transmitted to the body.

Many facilities managers rely heavily on their sales agents of product manufacturer's to provide constant ongoing training. As a counter weight to the commoditization of janitorial supplies (pricing pressure), there is no substitute for ongoing product training so developing a relationship that can deliver constant, consistent training to existing and new staff members becomes critically important. Customer service becomes a distinct advantage and a valuable asset to facilities managers. We'll explore this further in this document.

Key Takeaway:

Customer service becomes a distinct advantage and a valuable asset to facilities managers.

"Most valuable is a well trained staffer: the price of the product is insignificant."

Jan/San Research Participant

Viewpoint #2: How Training is Delivered is Just as Important: A Tale of Two Formats

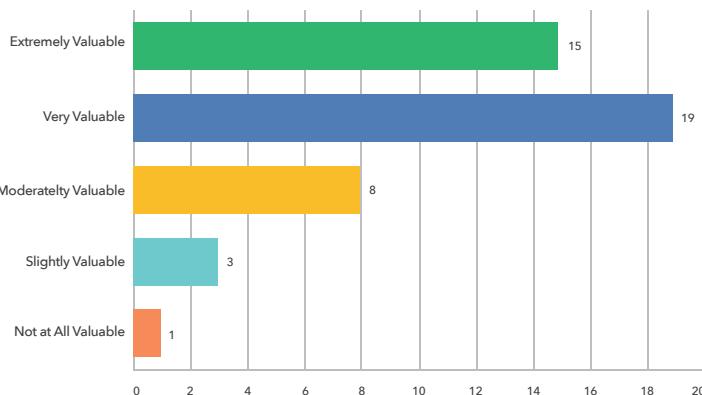


Chart: How Valuable is Training When Received in Digital Format? (ie: videos, tutorials, blogs, emails, webcasts, etc.)

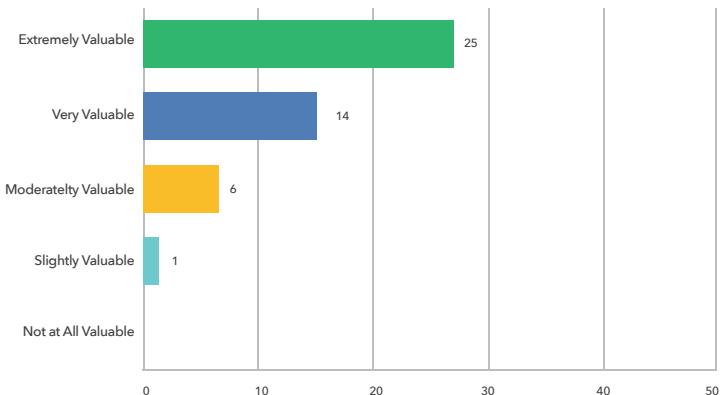


Chart: How Valuable is Training When Received in Person? (ie: organized classes, hands-on workshops, etc.)

Key Takeaway:

Over 74% of respondents indicated that digital training formats (video training, tutorials, blogs, etc.) were either important or very important.

A person wearing a white protective suit, mask, and goggles is spraying a surface with a black sprayer. A red cylindrical object is visible in the bottom left corner. The background is dark and out of focus.

"For my job, it's all about product knowledge. And they bring in vendors to share this information and provide us the info we need to sell. If there are more ways to bring in product knowledge that's always going to be helpful."

Jan/San Research Participant

Our recommendation based on our research findings is to start to establish a training library that can be accessed by clients and their teams to deliver timely, time-shifted, consistent training that supports any in-person Jan/San training regime.

We've also uncovered that in-person training can be accomplished via live webinars and video conferencing; many respondents indicated that in-person training – whether digital or in-person – was a preference. With a little planning and coordination, deciding the format, topics, and delivery vehicle, you are on your way to delivering much needed and valuable information to better your industry and position your company as a trusted resource.

To note, nearly 72% of respondents indicated that the industry does not have enough or are not sure there are enough bi-lingual training materials. With 24% of respondents indicating they speak Spanish fluently, we would suspect the number is much greater. If proper and consistent training materials and information is the most important aspect of the Jan/San industry, consider your audience when producing materials so all can access this valuable information.

"Language barrier; not enough learning/training; Guided discovery; Always stayed on the consultative side."

Jan/San Research Participant

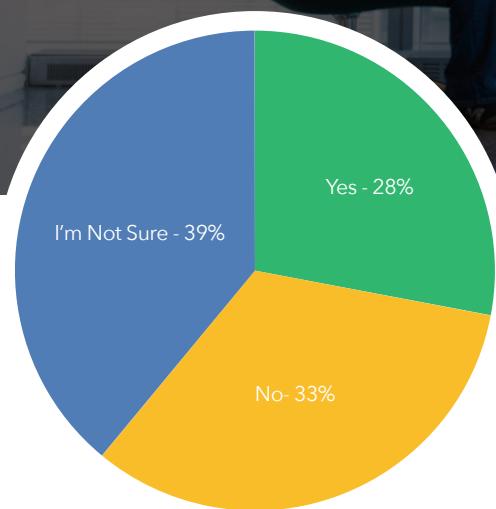


Chart: Do You Think the Cleaning Supply Industry Has Enough Materials and Resources (ie. labels, brochures, in-person training, guides, etc.) Available in a Variety of Languages?

Viewpoint #3: Shifting Conversation About Cleanliness and Disinfection

Pre-COVID-19 Pandemic

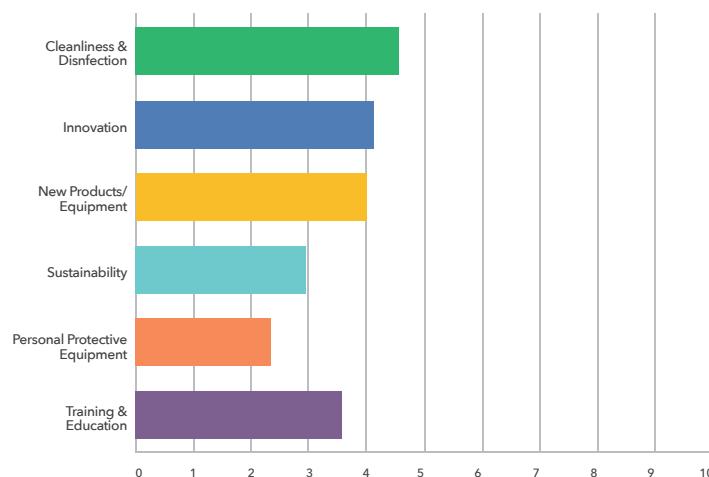


Chart: Prior to the COVID-19 Pandemic, What Topics Were Frequently Discussed Within the Cleaning Industry? Rank in the Order of Frequency Talked About.

Current Topics Frequently Discussed

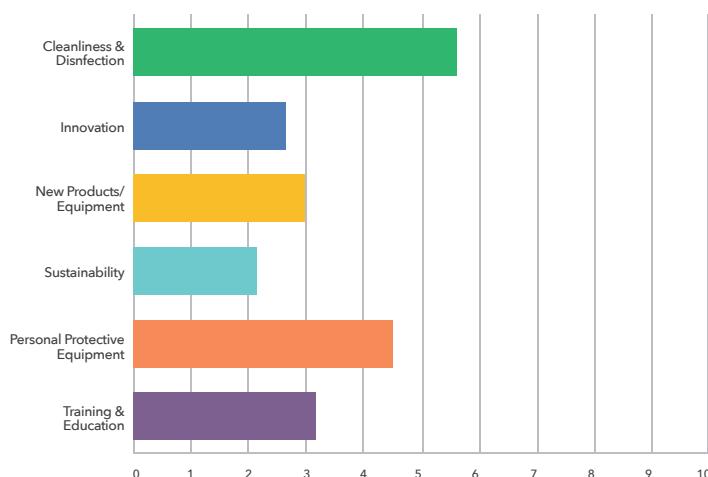


Chart: Currently, What Topics Are Frequently Discussed Within the Cleaning Industry? Rank in the Order of Frequency Talked About.

Key Takeaway:

In the midst of the COVID-19 pandemic, that number grew by almost 2x to 91% who chose cleanliness and disinfection as either their first or second choice.

"Goal is to keep virus infections on surfaces from getting into the body; it's all about preparedness and prevention."

Jan/San Research Participant

Similarly, prior to the COVID-19 pandemic, the topic of personal protection equipment was dead last among topics being discussed with 15% of respondents choosing that either first (4%) or second and during the COVID-19 pandemic, that number grew to 64% to rank second among topics being discussed.

When asked to look ahead 12 month, industry participants were asked to speculate on important topics for discussion and the current "post COVID-19" data still held up. Cleaning and disinfecting was still number one, training still held strong in the number three position with personal protective equipment holding firm at the number 2 spot.

We'll look at how the conversation evolves around new policy later in the study.

Viewpoint #4: Importance of the Job: Meaningful Work, and Industry Perspective

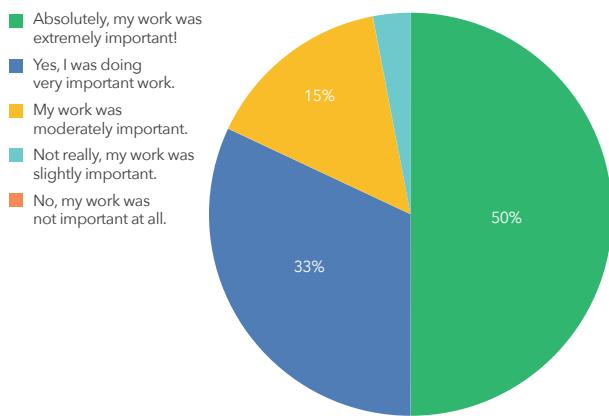


Chart: Prior to the COVID-19 Pandemic, Did You Feel You Were Doing Important Work?

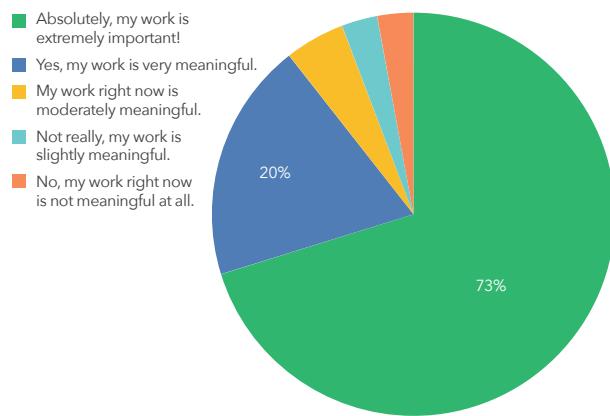


Chart: Do You Currently Feel That You Are Doing Important Work?

The simplicity of this question doesn't underestimate its importance. It's significant because prior to the COVID-19 pandemic 83% of participants understood that the work they were doing was important, either extremely important or very meaningful. This is a good indicator of personal satisfaction that attracts and keeps talented, empathetic professionals within the industry. That bodes well for the future of the industry and the people and businesses it serves. By any indication, this is an overall healthy number that speaks well to its future. With the COVID-19 pandemic, that number has jumped incredibly by almost 10% to just about 92% of participants indicating that they feel they are doing important work.

As the COVID-19 pandemic unfolds, the front line workers and managers for surface infection control and the important work they do are now playing out in people's daily lives, on the news and are top of mind as people return to public spaces and businesses reopen.

One physical indicator of the importance of this work, is the displaying of disinfecting badges on public and private spaces. Not only is cleaning and disinfecting important, but how they are cleaning, the products and processes businesses are using, who is doing the cleaning on a regular basis, becomes as important as food safety labeling. We see this trend as continuing and a regular part of business communications going forward.

Ask yourself, are you bringing your cleaning processes and procedures to the forefront for your customers and employees with a clear badge certifying your disinfection regimen?

Key Takeaway:

Prior to COVID-19 82% of respondents indicated they felt they were doing meaningful work. In the midst of the COVID-19 pandemic, that number has grown to 92%.



Viewpoint #5: Policy Debate: What Are the New Rules?

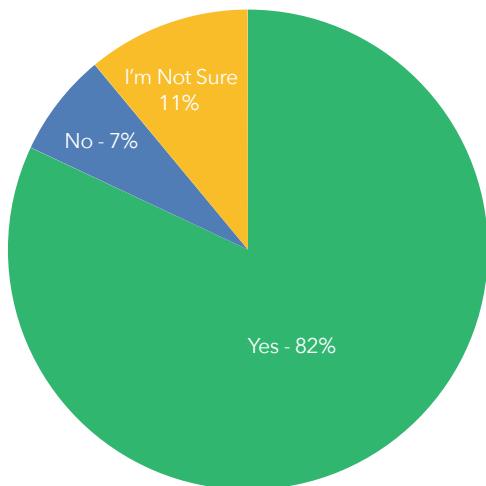
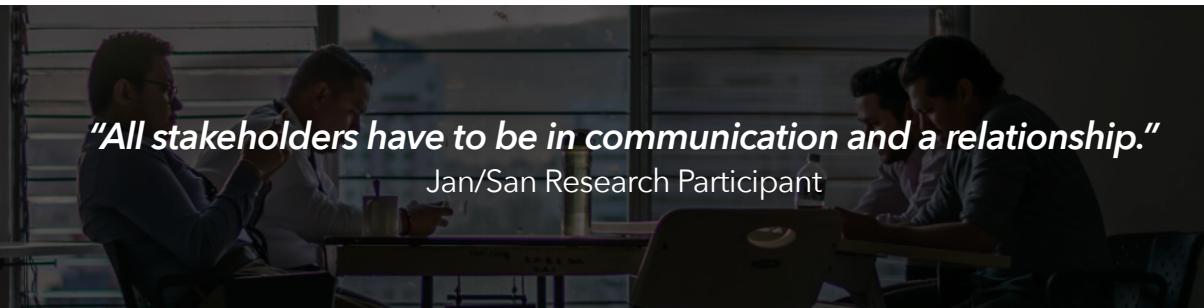


Chart: Should There Be New Policies Put Into Place Coming Out of the COVID-19 Pandemic?

With nearly 60% of respondents answering there are not enough regulations and guidelines for cleanliness and sanitation in our public spaces, over 82% of respondents agree that there should be new policies in place to protect our public spaces and keep them from spreading contaminants. But who should make these regulations and how can the Jan/San industry as a whole contribute and guide the discussion to help shape policies.



From our research there are at least three ways the Jan/San industry as a whole can guide the discussion and shape important, meaningful and lasting policy that will in turn guide our facility managers and the front line workers, help policy makers understand the legislation and create trust that a new level of protection of our public spaces and micro societies is taking place.

1. Industry Associations: Use industry associations to establish a task force to examine current policy, and recommend guidelines to their legislatures. Associations like the ISSA and others are a great way to assemble a task force to understand the issues and create a singular voice to establish guidelines for new policies. This is a great first step for getting our collective arms around the issues. Formalize those guidelines and circulate to the larger association to get buy in from the group before sending to your legislative representatives at the local, regional, state, and federal level.

2. Research Study: A little research goes a long way. Set up a study (such as this one) that will gather important data from all stakeholders on policy. Business owners, frontline personnel, industry associates, government officials and their staff members can all participate. Having a quantified data set to support some of your policy recommendations will go a long way and will demonstrate your commitment to the mission to develop and prioritize the right policies.

3. Build a Training Library: Continue to build a library of cleaning knowledge. We learned from the research that ongoing training is exceptionally important to the ongoing Jan/San industry mission. Continue to develop those training modules and a tutorial library to build a body of knowledge to demonstrate your expertise in this area. The applications for these tools are limitless and you might become the go to resource for ongoing consultation. Trust and consultation are what separates commodity pricing for products and with true customer service oriented companies that will shine in the face of the evolving landscape in the Jan/San industry.

Conclusion

As businesses and community spaces begin to reopen, it's important to remember that we are still in the midst of a global pandemic. It's more important than ever to stay vigilant and informed while clearly communicating. The Jan/San industry as a whole has a collective responsibility to respond to this global threat with new policies, new procedures, and new training regimes to continue to protect our people and regain confidence in our public spaces.

We hope this study helps you to gain better insight into the shifting perceptions of the Jan/San industry and how we as an industry can evolve and pivot to address the greater public good.



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