

January 2018

## The Successful Keying Meeting

*For ASSA ABLOY Door Security Solutions Key Systems Specialists.  
Following these simple, proven guidelines will help ensure a successful keying meeting.*

### BEFORE the Keying Meeting

1. Identify who the decision-makers are for keying and the level of detail they are responsible for. Keep the number of attendees small.
2. Select a location free of interruptions.
3. Speak to each decision-maker to schedule the meeting and explain its purpose. Then send a written agenda detailing the overall objectives and anything specifically required of individual attendees.
4. Advise decision-makers that they may need 1 or 2 "key" advisors present. This avoids "I'll have to get back to you" delays.
5. If there is an existing system, obtain a schematic and find out how the new job fits into the overall picture.
  - Contact key records to determine the state of the existing system and to confirm the availability of expansion options, and what they are.
6. Study all available information so you can arrive prepared to lead the meeting and present your recommendations.
7. Contact the attendees shortly before the meeting to provide a reminder and to ascertain any new issues for discussion.

### BRING to the Keying Meeting

To lead a successful key meeting it is recommended you bring the following items:

1. ASSA ABLOY Master Key System Design Guide & worksheets
2. ASSA ABLOY Key Control Guide
3. Key Wizard demo disks
4. Catalog(s)
5. Samples of cylinders & keys
6. Keyed Order Lead sheets
7. Administrative documents for signing, if applicable
8. Blueprints of the project
9. Specification section 08710 - Note: New construction documents have a specification section 08710 "Finish Hardware" that specifies the requirements for the key meeting, that information is usually found in Part 1.

## DURING the Keying Meeting

1. Be patient. Most people do not understand the complexities of master keying or cylinder mechanisms. Use the following steps to remove the fear of the unknown and bring attendees to a common understanding. Putting people at ease from the beginning will increase your success and add to your value as the key systems specialist.
2. Be prepared to lead the meeting. **You** are the specialist. Review the intended purpose of the meeting to be sure all attendees agree on what should be accomplished.
  - Begin the meeting with...
    - The introduction - Example: Hello, my name is (insert your name), I am the Key System Specialist for (insert your local DSS organization's name), and I would like to thank you for your time today.
    - The purpose of the meeting - Example: The purpose of this meeting is to discuss your master key system needs and determine how we can position your system(s) to be more secure and to better meet your security objectives.
    - The process (the following are examples only – make them your own)
    - First, I would like to introduce you to ASSA ABLOY Door Security Solutions and to the other people who are here with me today (if applicable).
    - ASSA ABLOY Door Security Solutions offers a comprehensive mix of logical and physical security products from industry-leading brands; from doors to door hardware to factory master keyed systems, key control products & solutions – everything you need to meet your security objectives, all from one source.
    - (Insert your local DSS organization's name) is ASSA ABLOY's local office, comprised of sales representatives, architectural specification consultants, and electromechanical and vertical market specialists; this team is highly trained to assist you in the selection, servicing and maintaining of door and hardware products.
    - (Existing system) I would like to share with you what the manufacturer is saying about your existing system.
    - (New system) I would like to give you some recommendations as to how we can successfully align your master key system with your security objectives and meet the most current trends of what a factory secured master key system should look like.
  - The payoff
    - (New system) I'm confident that by the end of this meeting we will be able to design a secured master key system that will meet your security objectives.
    - (Existing system) I'm confident that by the end of this meeting we will be able to show you how we can effectively align this new addition to your existing system(s).
3. Be sure attendees understand each other's roles. Individual introductions may be necessary.
4. Identify the "big picture" of the keying system: Is it personnel flow or security?
  - Use the Master Key System Design Guide as a reference and to support your recommendations.
  - Now would be a great time to show the flash interactive presentation "Designing Master Key Systems"
    - Can be found on ASSA ABLOY Academy at the following site:
      - <https://assaabloy.box.com/s/ldd3ma1ap4n3bm72nqa7useonmwfislu>
      - File extension: ASSA\_ABLOY.exe.
    - The Master Key System Design Guide can be obtained through ASSA ABLOY Academy Resource site: Located in the General Documents Folder.  
<https://www.assaabloyacademy.com/en/local/assaabloyacademycom/americas/lesson-resources/2018-key-systems-specialist-resources/>
5. Use #4 to guide the direction of the keying system and to sell specialty features where applicable: CMK, VKC, IC (interchangeable or removable core type cylinders), patented locking systems i.e. patented keyways, security or high security cylinders, authorized access control locking devices, integrated electronic access control devices, 7-pin, personalized key stamps, and number of keys per cylinder or keyed alike groups.
6. Agree on the level of detail to be decided. Will it just be the overall system structure and cylinder type, or will you assign a change key to each opening?
  - Depending on the level of the system and overall structure, it's not recommended to use the first meeting to assign individual key sets to every door in the facility.

7. Use a clear visual aid - a schematic of the system in question. Use it to explain general concepts of keying and key symbols to novices and to "sell" **your** recommendation for keying the job. Yours should be the first recommendation presented, together with the reasons behind it.
  - Use the most appropriate worksheet(s) KS.1, KS.2, KS.3 or KS.4 to help demonstrate what a schematic looks like and to help lay out the various levels - be sure to use the examples on the back of each worksheet for a visual reference.
  - Each of the four worksheets can be obtained through ASSA ABLOY Academy Resource site: Located in the General Documents Folder.
    - Worksheet KS.1
    - Worksheet KS.2
    - Worksheet KS.3
    - Worksheet KS.4
8. NEVER allow the person-to-door approach to be used! This approach creates extensive cross keying and it *cannot* be part of a secured factory master key system! Guide all thinking along the lines of the key system schematic, and/or the worksheet(s).
9. Stress the importance of planning all possible features (CMK, IC, security cylinders) and expansion *in all areas* of the system from the outset. Expansion must include actual numbers.
  - Use the analogy of *painting yourself into a corner* to illustrate the danger of poor planning.
10. Explain the dangers of putting too much under one all-powerful great great grand master "ego key" and do everything in your power to discourage such a key and large systems.
  - Use the rubber band analogy to illustrate what a top heavy system can do for expansion opportunities.
  - A master key system is like a rubber band. When you stretch it vertically (more levels of keying) it contracts horizontally (fewer combinations at each level). When you stretch it horizontally (more combination at each level) it contracts vertically (fewer levels of keying are available).
11. Minimize cross keying. A jovial explanation of why the key ring was invented can break the ice in your efforts to stop extensive cross keying.
12. Maximize use of keyed alike (KA) groups to conserve combinations. This can also eliminate "sub masters."
  - The term "sub master" is recognized in a 6-level master key system. If used in a lower level it's recognized as a master key and is designed as such in the master key system.
13. Accept all *reasonable* input, even if it opposes your original recommendations. However, temper this indulgence with #14.
14. Some requests are mathematically impossible. Others are built on the convenience of today's personnel at the expense of tomorrow's security and expansion. Suggest alternatives to unreasonable requests. Know when to say *no* and mean it.
15. Do not commit the factory to do everything the customer wants in a large or complicated system. Know when to say, "We have to check with key records."
16. Have the most recent keyed order lead sheet handy, use it as a check list making sure that everything has been covered and addressed.
17. Review all applicable authorization procedures (for bitting lists, security keys, MK's, etc.) and determine who will be authorized to sign. If any authorizations are necessary to accompany the initial order, now is the time to get the signatures. This avoids surprises and delays later.
18. Prepare a "clean" list of decisions made and get *signed* approval. Stress that later changes are costly and may not be possible.
  - A key system schematic and/or the keyed lead sheet is an excellent sign-off document.
  - Each of the system schematic worksheets has an approved by & date line for this use.
19. Unauthorized key duplication remains the most violated security and the single largest problem among facility managers.
20. Conclude with an explanation of how quickly a poorly managed key system deteriorates and determine if there will be key management policies and procedures established to support the system.
  - Take a few minutes to review the ASSA ABLOY Key Control Guide and stress the importance of adopting such a policy.
  - Sell key control software.
  - Have a Key Wizard demo disk available to give each attendee
    - The Key Wizard demo disk may be obtained from the appropriate lock company; contact them directly for availability.

- It can also be obtained and downloaded at [www.keywizard.net](http://www.keywizard.net)
- The ASSA ABLOY Key Control Guide can be obtained through ASSA ABLOY Academy Resource site.

#### AFTER the Keying Meeting

1. Finalize all details left undecided at the meeting. Document the decisions, get signed approvals and provide copies to all attendees.
2. Assist in the preparation of or review the keying schedule for final submission & approval.
3. Format the order properly and send it in. Be sure to include the system registry number if it is an existing system, and a letter of authorization for any items that may require it.
4. Use the Keyed Order Lead sheet as a check list and review