State of the Industry

Digital Transformation in Field Service & Construction

goformz

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Field service digital adoption

The construction and field service industries are comprised of a variety of roles and responsibilities that rely on consistently capturing highly accurate and timely data. Many teams, however, still rely on paper forms and manual filing and processing as their primary means of collecting, delivering and storing critical business data. Dependency on paper forms and manual data collection is costly, resulting in delayed workflows, inaccurate data and frequent human error. Transitioning to a digital forms solution can address these issues while modernizing business operations.

Overview of those surveyed

We surveyed select IT decision makers from the top field service and construction businesses, to ascertain their most common pain points when it comes to collecting and processing information via forms.

In this report, we provide the survey findings, present some key observations, and offer perspectives on how digitization can alleviate many of the pain points faced in the modern field service industry.

" 95% of IT decision makers responded that 'going paperless' is a top initiative over the next 18 months.

Key observations

- Almost all businesses surveyed (90+%) believe that replacing paper forms with digital ones will improve their operations. "Going paperless" is a top initiative for them in the next 18 months.

- 81% of companies surveyed still rely on paper forms; a third of them use paper for more than 75% of their documentation

- 88% of field service teams surveyed are unsatisfied with using paper forms to collect data

- The biggest challenges of using paper forms have to do with data quality and efficiency. This includes:

  - Delivering forms from field to office

  - Making sure collected data is complete and accurate

  - Processing forms (e.g. rekeying data, scanning, etc.)

- Nearly 2/3 of respondents believe automated record-keeping and form storage would greatly improve their operations

# Currently, what percentage of your company's forms are paper (not digital)?

19% Use paper for **less than 1/4** of forms

81% Use paper for **more than 1/4** of forms
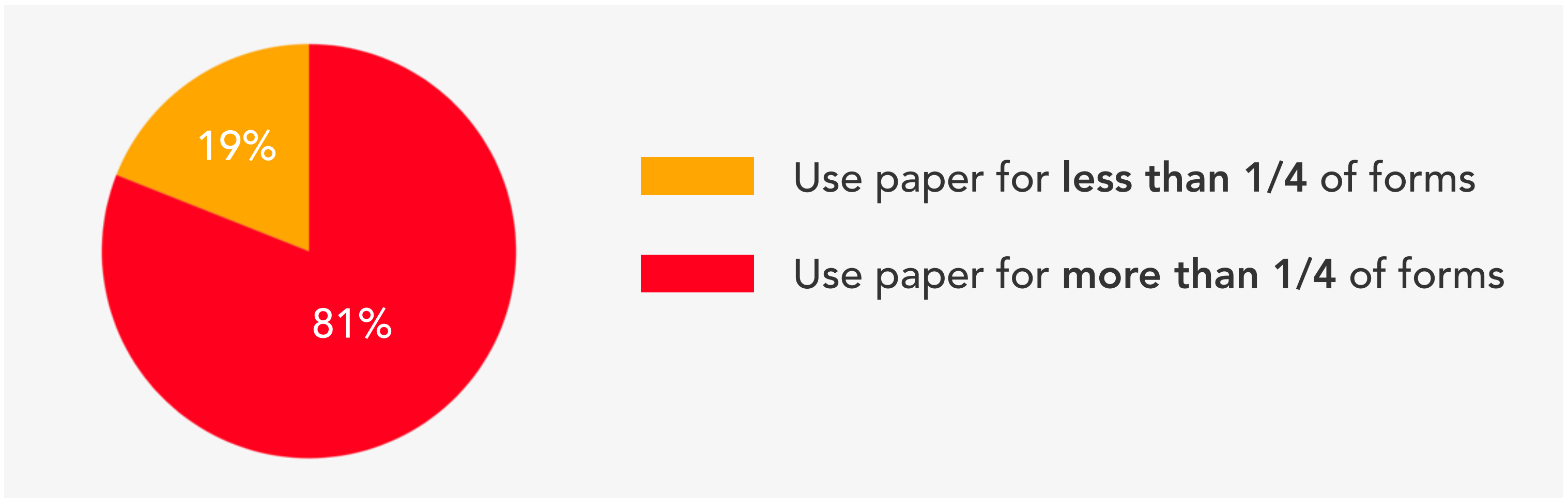
81% of companies surveyed still rely on paper forms (for 25% or more of their forms). This indicates that most businesses in the industry still have a long way to go to achieve a paperless workplace.

Use paper for 0 to 25% of forms

Use paper for 26 to 50% of forms

Use paper for 51 to 75% of forms

Use paper for 76 to 100% of forms

What's more, **29% of companies surveyed disclosed that they still use paper for more than three quarters of their forms** — indicating that their 'digital transformation' journey has barely begun!

How satisfied are you with using paper forms?

Pie chart:
- 71% — Very unsatisfied
- 17% — Somewhat unsatisfied
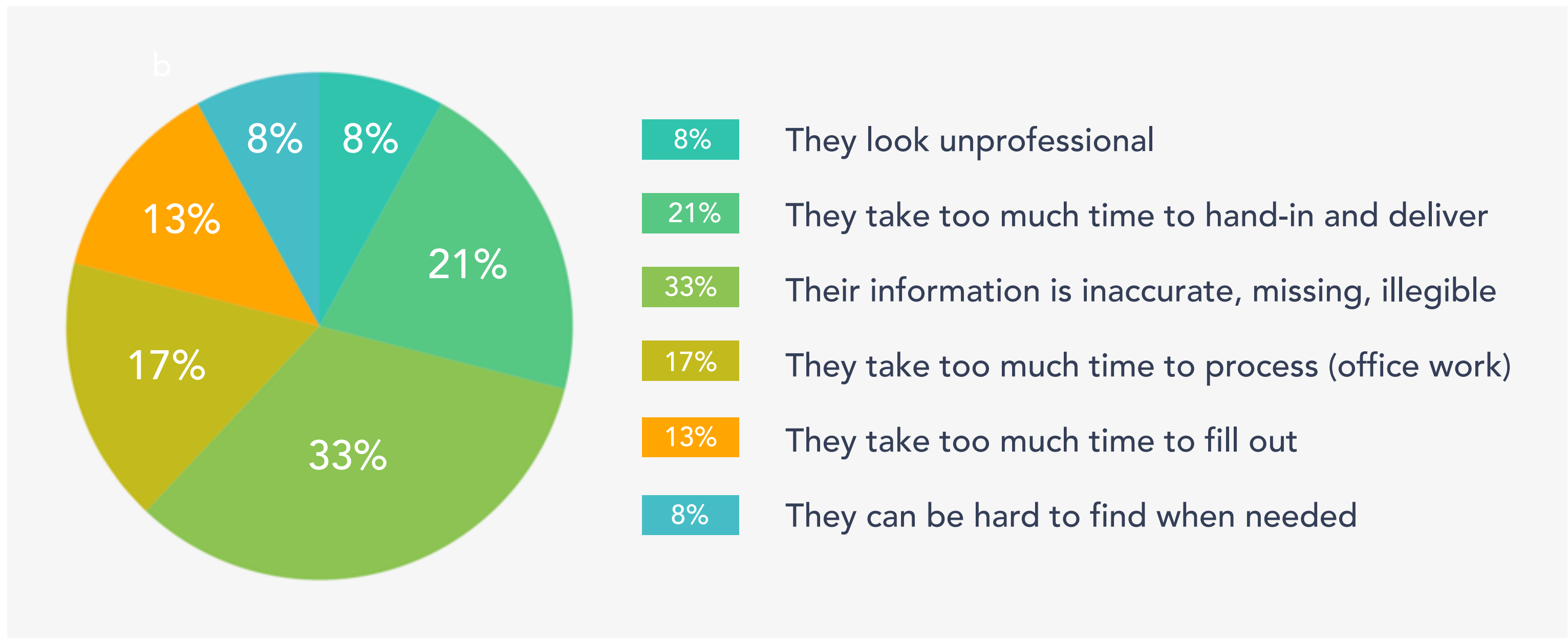- 12% — Somewhat satisfied
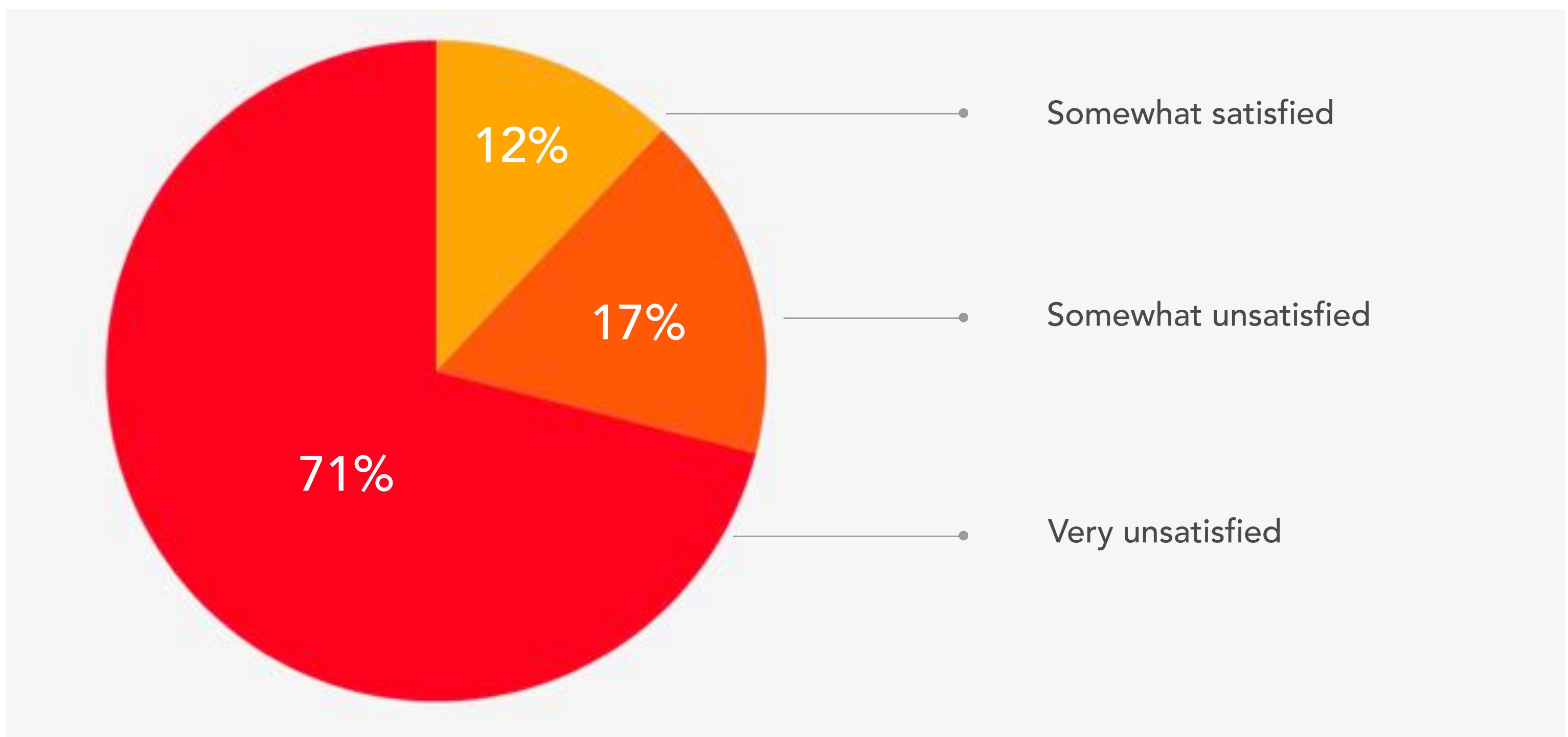
88% of respondents are unsatisfied using paper forms, with 71% reporting being 'very unsatisfied'. An overwhelming number of field service professionals are unsatisfied with their paper-based documentation. This indicates an incredible opportunity for optimization in field data collection, via the adoption of digital solutions like mobile forms and business workflow automations.

Digitizing forms for use on phones and tablets allows teams to enter data within a familiar, intuitive interface, while presenting a plethora of opportunities for optimization that are unavailable to paper documents.

Fun fact: 'Very satisfied' was an option selected by none of our survey respondents.

Of the following, what is the biggest challenge of using paper forms?

8%	They look unprofessional
21%	They take too much time to hand-in and deliver
33%	Their information is inaccurate, missing, illegible
17%	They take too much time to process (office work)
13%	They take too much time to fill out
8%	They can be hard to find when needed

According to our respondents, the greatest challenges of using paper forms have to do with data quality and efficiency — rather than the actual process of filling out forms.
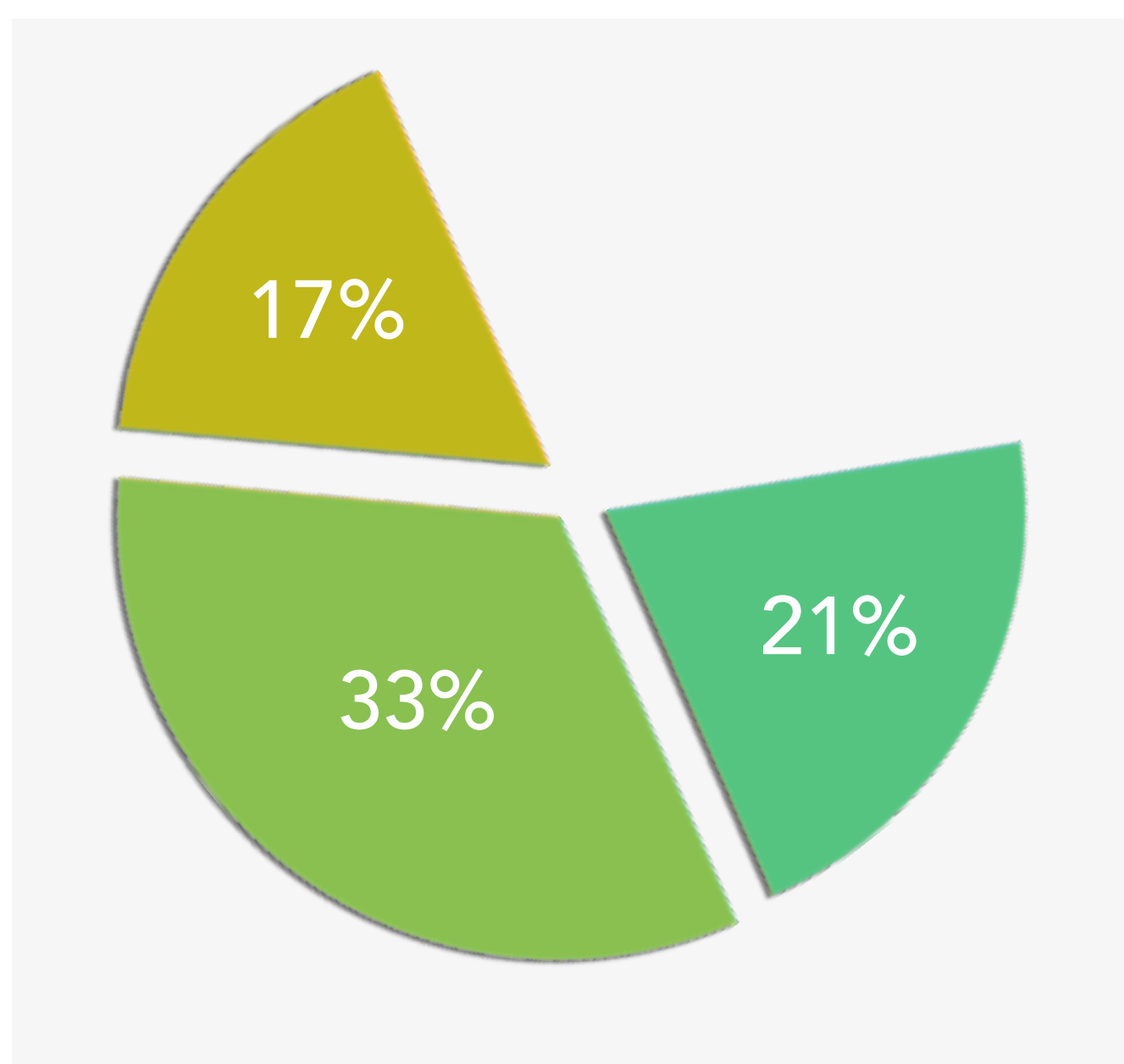

71% of those surveyed reported issues with data quality and efficiency, including:

- Inaccurate, missing, or hard to read information (33%)

- Delays in form delivery (21%)

- Delays in form processing, i.e. rekeying data, etc. (17%)

Digital form solutions remedy each of these three major issues identified by respondents:

- Digital forms can be equipped with logic that guides user input, enforces data completeness, and increases the accuracy of collected information
- A mobile form filled out in the field can be made available to office staff as soon as it is complete, eliminating time wasted in transit
- Automatic Workflows can be set up to process form data and establish a real-time flow of information between teams, business systems and databases — making sure your data gets where it needs to go without any added busywork.
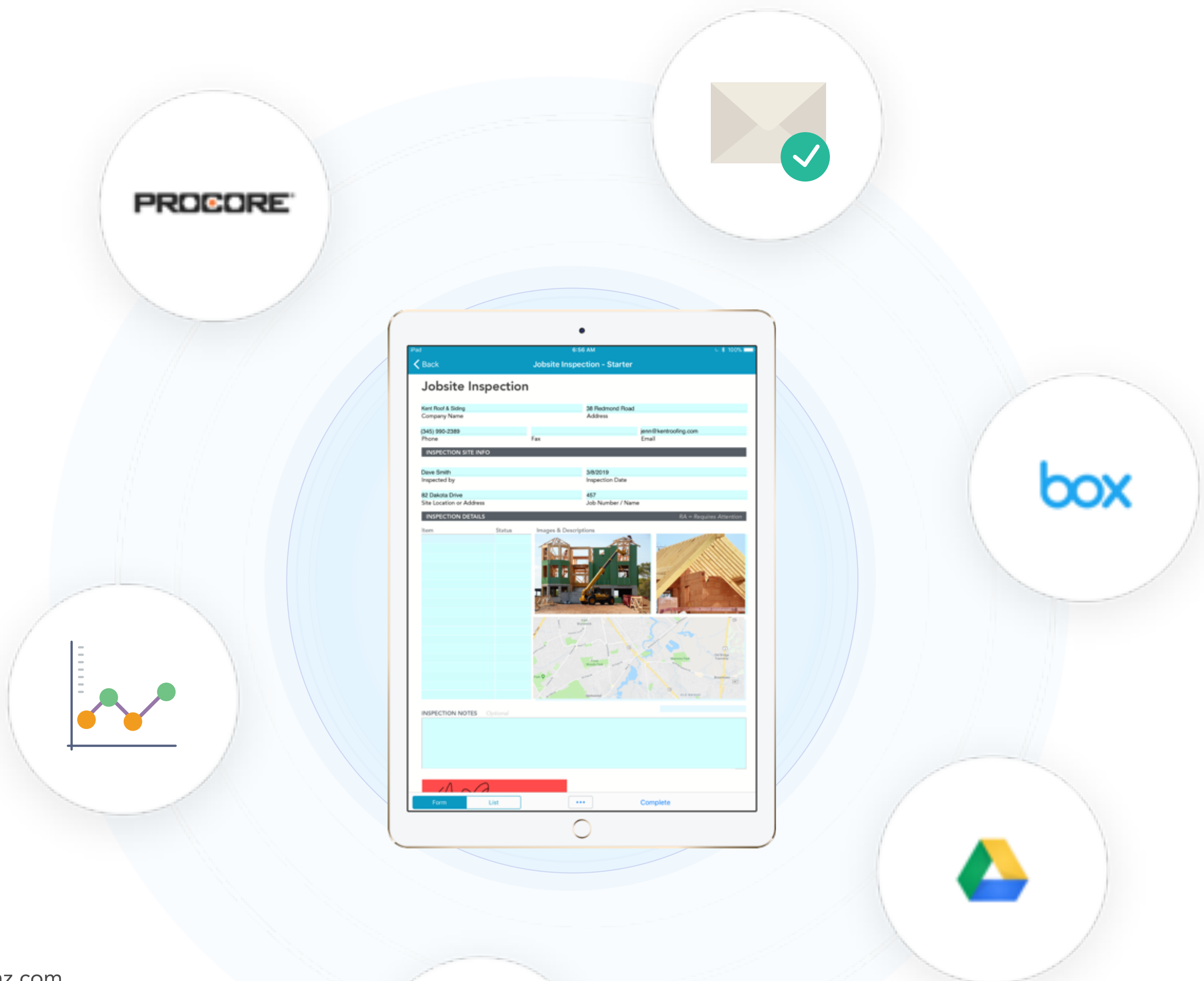
Do you think replacing your paper forms with digital forms would improve your operation?
Is your company planning to go from paper to a digital solution within the next 18 months?

90% believe digital forms
will improve their operation

95% plan to go digital
within the next 18 months
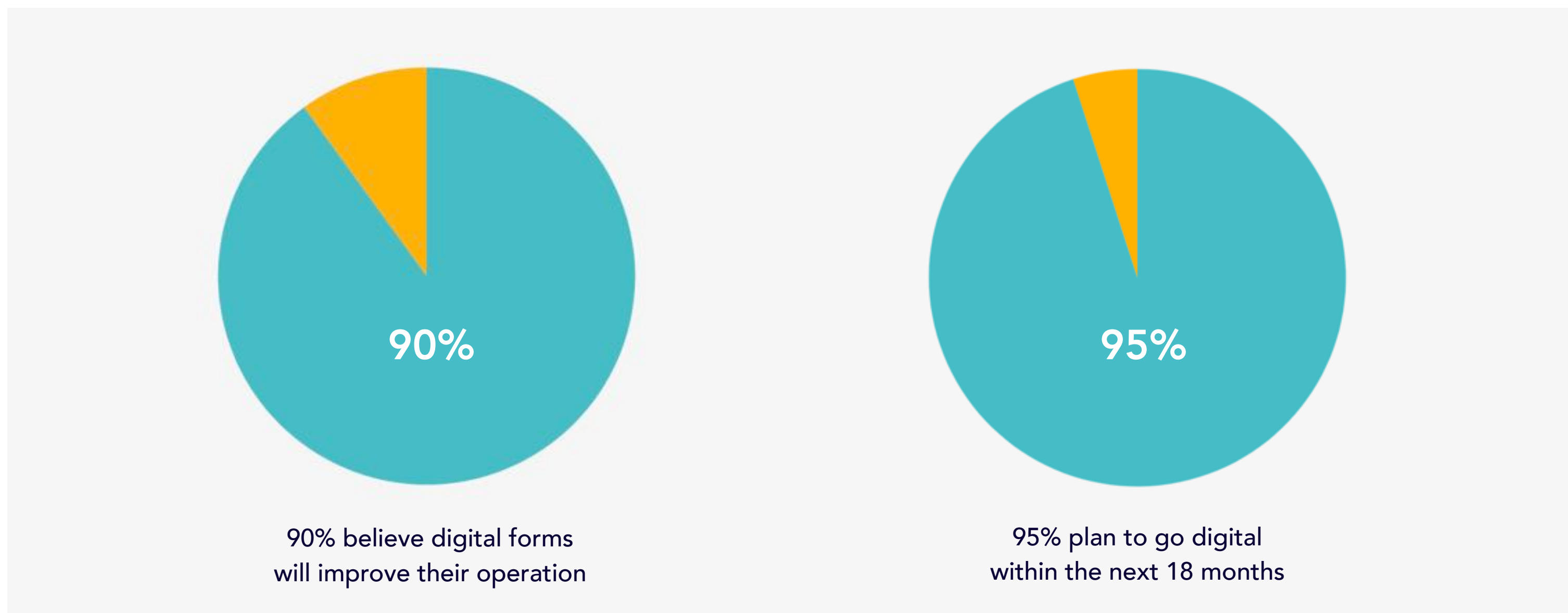
The vast majority of respondents (over 90%) believe switching to digital forms would improve their operations and plan to do so soon. Citing unreliable data and costly processing delays as major obstacles to optimizing their operations, field service professionals plan to implement digital solutions to traditional data capture in the near future. Leveraging mobile forms as a primary means of data capture and workflow automation has proven to result in field to office efficiencies via the elimination of manual handoffs, real-time data access, and custom, automated workflow capabilities.

Which of these features would most improve the process of filling out forms? (Select all that apply)

42%	Automatic calculations
54%	Pre-filling fields with information
63%	Automatic record-keeping and form storage
42%	Automatically dispatching, sharing, and submitting forms
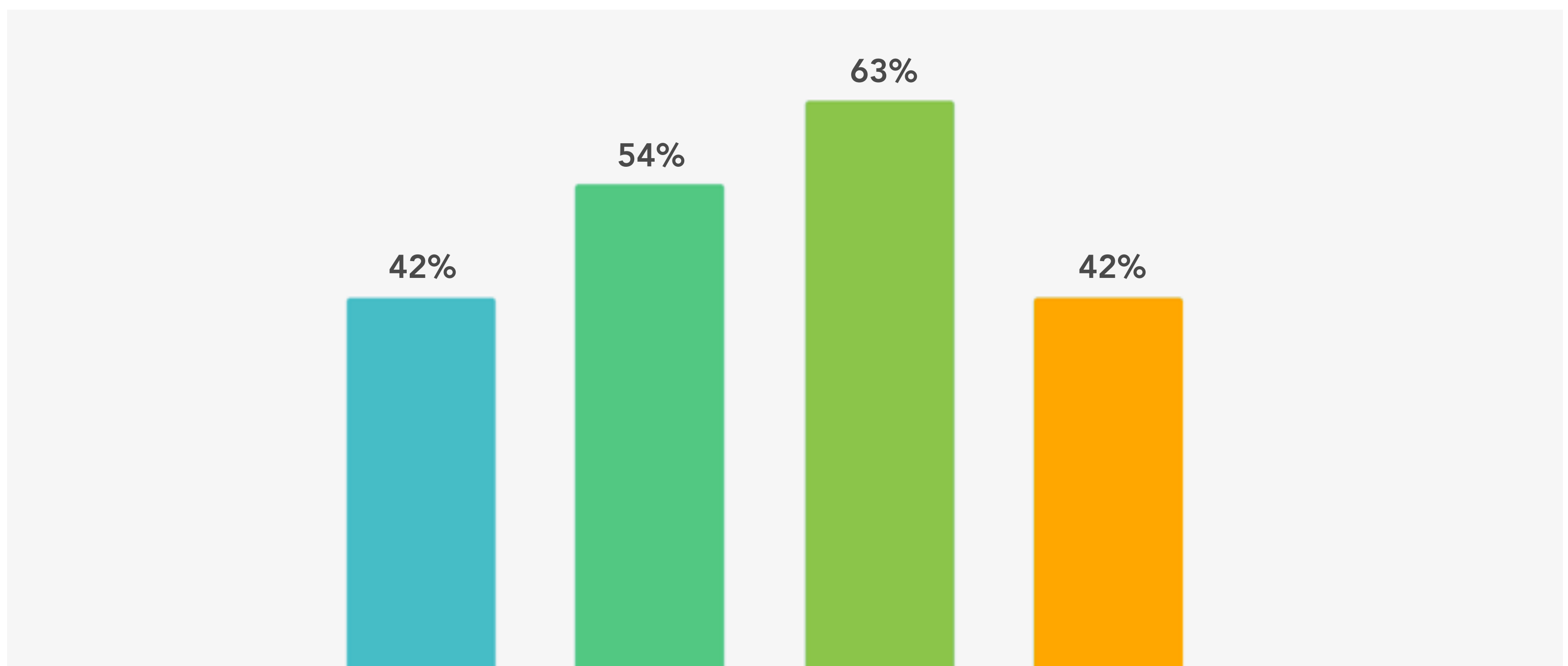
Respondents indicated that each of the digital form automation features listed in the survey would improve their data capture processes. Automatic record-keeping and form storage took a slight lead with 62.5% of respondents indicating this functionality to be important, but all other features gathered significant support as well, with none coming in below 40%.

This speaks to the enormous benefits of automation as a whole in the field service and construction industries. While different businesses have different automation needs, most agree that **automating their paper-based processes via digital forms would result in significant time and money savings.**

Survey conclusions

- 81% of companies surveyed still rely on paper forms; a third of them use paper for more than 75% of their documentation

- 88% of respondents are unsatisfied with their paper-based documentation

- 71% of those surveyed reported issues with data quality and efficiency of paper forms

- 90% of respondents believe switching to digital forms would improve their operations

- 95% of respondents plan to pursue a digital solution to paper within the next 18 months

Digital forms for field service

Digital forms rapidly address the most common and immediate needs of field service teams, including those identified within this survey.

Digital forms act as an excellent front end to field service data capture, allowing real-time, highly accurate data to be instantly piped from the field to connected systems, databases, and dashboards. Digital forms can be equipped with simple logic and auto-fill capabilities, ensuring data is complete and accurate before it is shared with teammates or transmitted to integrated systems – seamlessly elevating the quality of collected information and leading to more impactful, valuable insights.

Leveraging automated capabilities, forms can be instantly and dynamically stored within cloud applications and systems of record. With forms instantly saved to corresponding records, teams can not only reduce opportunities for human error and manual delays, but also eliminate the need for physical resources (like filing cabinets and printing supplies), drastically reducing administrative overhead and directly benefiting your bottomline.

Digitizing with GoFormz

Mobile field service forms are incredibly easy to create, route and manage, and provide a centralized means of storage. Digitizing your forms with GoFormz is quick, simple and intuitive – just upload a JPG or PDF of your form, drag and drop fields in our web editor, add logic and dynamic features and start filling out forms on your phone or tablet. Your digital forms can look exactly like your existing paper forms, or completely new versions.

Your digital forms can be filled out in 'Form View', which looks exactly like your original form, or List View, a small-screen optimized viewing mode. GoFormz mobile forms are even fully functional offline, allowing field teams to complete their work in remote areas, and sync collected data once a signal becomes available.

GoFormz mobile forms can be connected to your other critical business applications (like ServiceMax, Smartsheet, and Box) establishing a constant current of real-time data between your systems. This means that data captured within mobile forms can be used to dynamically create or update records, as soon as a form is completed. Mobile forms pre-filled with data can even be dispatched from third party applications, using custom triggers and workflows.

To learn more and try GoFormz
mobile forms for free, visit

www.goformz.com