



## HVAC and plumbing contractor enriches their data collection and eliminates errors

### INDUSTRY

Mechanical &  
Plumbing Contractor

### CUSTOMER SINCE

May 2017

### FORMS

- Daily Report Forms
- Timesheets
- Inspection Forms

# At-A-Glance

## Challenge

Needed a mobile forms solution to help teammates complete and submit forms faster, while eliminating errors and wasted time.

## Solution

Used GoFormz to digitize their existing paper forms, which allowed them to consolidate daily processes and achieve higher efficiencies.

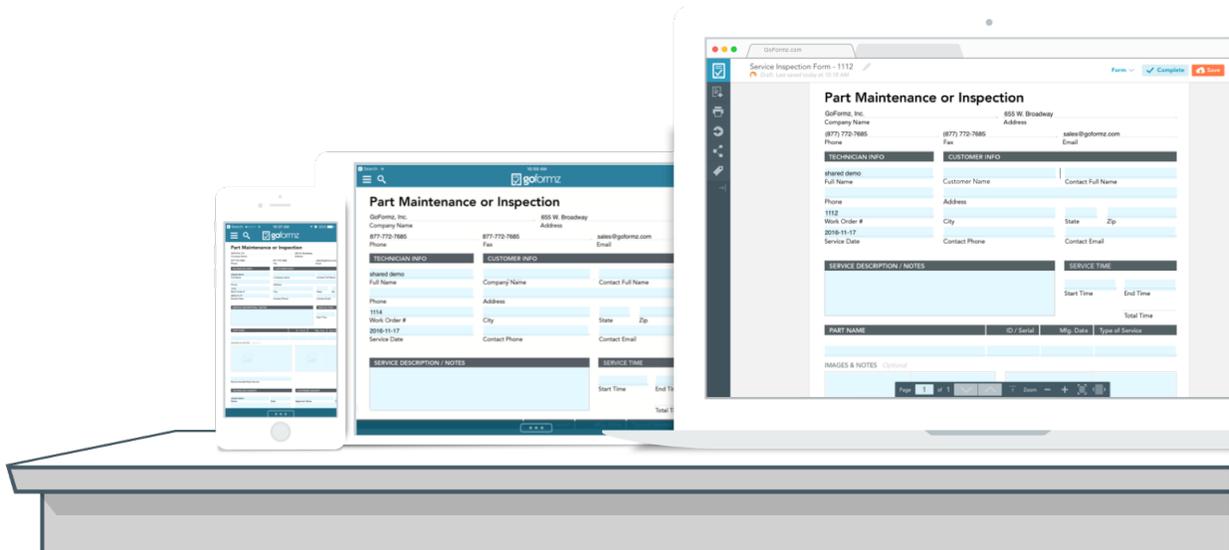
## Results

- Vastly improved form completion and processing times
- Eliminated data entry errors and poor handwriting
- Enriched collected data (photos, maps, and signatures)
- Established a more professional experience with customers
- Improved employee moral

## Why GoFormz

*“GoFormz makes our lives easier.” — Jeff Dumps, Project Engineer*

# About Central Mechanical Inc.



Central Mechanical, Inc. is a mechanical and plumbing contracting company that was established in 2012 in Fairbanks, Alaska. They provide a variety of professional services that range from plumbing, heating, HVAC, utilities and process piping on commercial and government projects. The Central Mechanical team is dedicated to making sure that all of the projects they take on are a success, with safety being a top priority.

# The Full Story

Jeff Dumps, Project Engineer at Central Mechanical, noticed that he and his teammates needed a better means for capturing project data. Their paper form process at the time was prone to errors, time-delays, and lots of headaches. So, in early 2017 Jeff took matters into his own hands to find a solution.

## "Google It"

Jeff's journey to find the right solution began where many do: by simply Googling around. He looked at different solutions, like Microsoft Access, and other potential solutions. Most solutions did not address all of Central Mechanical's needs and were too complicated to implement.

***"I had been looking at different ways of streamlining our data collection... I was trying to figure out what would work best and was trying different things."***

Throughout his search, Jeff eventually came across GoFormz and decided to sign up for a free trial.

## The Right Match

After signing up, Jeff was a little cautious due to his experience with past solutions, but with the help of the GoFormz team, he was able to quickly dive right in.

***"I was skeptical at first, until my Account Manager made me feel more comfortable. She was knowledgeable and took the time to explain things to me. Together we setup a plan."***

The first form Jeff wanted to digitize was his team's Daily Report. This is a critical form that is completed every day at each of Central Mechanical's projects. In this report, the field crew captures crucial project data, such as descriptions of work being done, which employees are working the project, total hours worked, etc.

## Out with Old in with New

Jeff's newly digitized Daily Report form on GoFormz was much more than he expected, and he was impressed. Equipped with some of GoFormz' best features, Jeff's new form could now do so much more, all in one place, at a faster rate.

For starters, filling out the form was much easier. Its digital format eliminated the pain of both writing everything by hand and omitting crucial information. The new Daily Report also utilized the GoFormz *data sources* feature which allowed Jeff to reference a database of his current projects and employees. This meant that instead of filling in every piece of basic information about a project (name, location, and project number) a teammate simply selected the project from a drop-down menu and all of the corresponding general information was automatically populated.

The *auto-calculations* feature instantly made life simpler for teammates in the field because they no longer had to manually cross reference project names to project numbers or total up hours. Instead, the form would automatically perform calculations and cross references resulting in consistently accurate data.

Teammates no longer have to leave the jobsite just to hand deliver paperwork to the office. Once it is completed, the form is now automatically emailed to the appropriate recipients.

***“The automations built into the forms really help. It’s nice that we can just select a project name and the form automatically fills out related field information like the project number.”***

Administrators in the office who receive the completed Daily Reports were just as happy. They no longer had to worry about poor penmanship or chasing down teammates in the field for information, because the new report had *dynamic field properties* that would not allow forms to be completed if data was missing.

***“Our office administrator doesn’t have to constantly call our guys in the field and say I can’t read this or you forgot to fill this out.”***

#### What’s Next?

Since the implementation of GoFormz at Central Mechanical, teammates have become happier with their Daily Report process. It’s much faster and more accurate.

***“Guys in the field really like using it. They actually enjoy using it! Particularly***

*because they do not have to handwrite everything or carry around stacks of blank forms like we used to.”*

So, when asked what was next for Central Mechanical and GoFormz, Jeff already has some ideas. He hopes to one day have all of his teammates complete their timesheets on GoFormz.

Currently, he and his Vice President are testing out a timesheet form and it is showing promise. As for further down the road, Jeff said he would like to introduce GoFormz to their other offices in Anchorage and Las Vegas. Until then, he looks forward to seeing if there are other areas within his own team where GoFormz could help them improve.