



Millennium Nursery Increases Customer Responsiveness with GoFormz

INDUSTRY

Vegetation
Management Services

CUSTOMER SINCE

November 2015

FORMS

- Maintenance Verification Form
- Inspection Forms
- Checklists

At-A-Glance

Challenge

Needed a more efficient and professional solution to replace paper forms. Their old forms were causing significant workflow delays and were often handed in damaged or messy / hard to read.

Solution

Implemented GoFormz to simplify the paperwork process, allowing the mobile Millennium Nursery team to instantly submit their forms from the field.

Results

- Drastically improved customer responsiveness and professionalism
- Improved record-keeping and form recall
- Increased visibility into operations, for both the company owner and clients
- Realized significant time and budget savings (as a result of instant access to completed forms and automated record-keeping)

Why GoFormz

“...it allows us to be more efficient, it allows us to get to other things and actually focus on the customer, rather than just looking through papers.” - Tyler Spears, Technology Consultant

About Millennium Nursery



Millennium Nursery is a full-service landscape and maintenance company, completing residential projects in addition to a large number of commercial accounts (e.g. Walmart). The Millennium Nursery team has been servicing Florida's Tampa Bay area for over 25 years.

The Full Story

As a popular landscape and maintenance company, Millennium Nursery employs a large mobile team, with about 30 vehicles in the field. The 'on-the-go' nature of Millennium Nursery's business made using paper forms a frequent obstacle to efficiency. Completed forms required hand delivery to the office, delaying processing and costing each employee valuable time. When forms were eventually delivered, they were often crumpled, or messy, resulting in a less than professional presentation.

Tyler Spears, Millennium Nursery's Technology Consultant, knew there must be a more economical and productive solution. Tyler began researching solutions to Millennium's forms process, experimenting with Excel and various other options, none of which provided the templates or usability he had hoped for. "[They] weren't easy like GoFormz is," Tyler explained of his initial search.

Simple, Easy Usability

Upon discovering GoFormz, Tyler was pleased that his team could all work

within one account, across various devices and licenses. The ability for users to have their own login and profile under one business account, meant that Millennium Nursery could manage and assign each user's permissions, while also benefiting from account wide features like Data Sources. "I love the new function of the groups, it makes it easier for us [to control] what [users] can and can't change."

Tyler also appreciated the ease of submitting forms with GoFormz. "You can open a [form], enter the information, [GoFormz] saves it, and then you can go back in and do another [form] right away. You don't have to change anything around or delete stuff.

"The ease of filling out and submitting forms was a major selling point for Tyler, who had prioritized ease of use throughout his research. "I didn't want the guys to have to change things or figure things out, I wanted it to be easy."

The GoFormz Template Editor was also a source of excitement for Tyler and the Millennium team. "I really enjoyed the Template [Editor]. I could upload a PDF and just drag and drop all my custom

[fields]. It can't get much easier than that.”

The Millennium Nursery team now uses about a dozen different mobile forms. At first, they were a bit wary of mobile forms, but with Tyler’s guidance, the team quickly grew to rely upon the vast benefits of the digital forms. One especially useful feature for the Millennium users is the ability to use pre-populated fields. Using the GoFormz *Data Sources* feature to populate fields with previously captured data, users can now select a customer name, and the corresponding customer’s data (e.g. address, contact information, etc.) is instantly filled into their form fields.

Millennium’s mobile forms users are now extremely comfortable within their GoFormz workflow. “They all know which template to choose... and from there it’s simple. [They] plug in a few pieces of information, and a lot of it is already set up for them with the data sources we have set up in our drop-down menus.” Drop-down menus equipped with *Data Sources* drastically expedite this data entry process.

Digital Accountability

Mobile forms have also helped Millennium employees ensure the quality and completeness of their services. Leveraging checklists, Millennium employees can verify they have completed specific tasks, and present the completed form to customers. “There is a whole list of things they can check as far as the services we provided to the customer.” This improved customer-facing visibility now plays a major role in Millennium’s customer satisfaction process.

Image fields have also elevated Millennium’s customer service and responsiveness. “I have ten to twelve [Image fields] where [users] can submit pictures and add comments... customers love seeing pictures of the work that we do.” Customers receive the form containing these images automatically, via an automated workflow.

“That was a game changer as far as why we chose GoFormz... once we hit submit, it does it for us.”

Tyler has also implemented a “flag for review” function, using a checkbox and auto-email workflow. Team leaders can select the “flag for review” checkbox to notify that additional services have been completed, that were not originally anticipated (e.g. replacing a sprinkler head that was broken prior to servicing, which would then be billed to the customer).

The Millennium team is also pleased with the simplicity of GoFormz record-keeping. “We have [the forms] organized with different *Tags*,” Tyler explained. “I have a *Tagging* system set up so that when they choose their name as a supervisor, it’s the first *Tag* that shows up, and then the customer’s name... we just need to search for the customer’s name or the maintenance supervisor and we can pull up all their information.” *Tagging* not only improved record-keeping, but also acts as “checks and balances” for the Millennium team. By simply searching for a customer name, service data can be quickly recalled and referenced. “This comes in handy when we get questions about if we were at a service... this is one of the checks and balances to verify that.”

Tyler and the Millennium team have noticed a positive response to GoFormz from their customers. “GoFormz is something that the customers see, they know when we were there, they get a form every time. It’s something they appreciate. We get great feedback from our customers when we started [using GoFormz].” The professionalism and timeliness of GoFormz has now become something Millennium customers expect. “We’ve trained our customers to expect us to do this as well, and that’s helped our accountability to make sure we enforce and use the GoFormz [platform].”

Significant Savings

Millennium has witnessed noteworthy savings since implementing GoFormz. One area of drastic time savings is time spent filing completed forms. Before GoFormz, the hundreds of pages of paper forms completed daily would need to be manually processed and hand-filed. “We would have to go through folder upon folder to find [a specific form]. Now I go to the computer and type in the customer’s name, and it pops up everything. When it comes to saving time, I would say tenfold.”

Tyler also explained the significant payroll savings Millennium has experienced since implementing GoFormz. "We save on payroll, it allows us to be more efficient, it allows us to get to other things and actually focus on the customer, rather than just looking through papers."