



Oscar W. Larson uses GoFormz to streamline timesheet and payroll processing, auto-populate and dispatch work orders, and preserve the look and feel of government forms, resulting in a \$10M increase in sales and a savings of 25 tons of paper.

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FORMS

- Energy Audits
- Timesheets
- Inspections
- Work Orders

At-A-Glance

Challenge

Oscar W. Larson needed a complete mobile forms solution that would allow their team to rapidly collect service data and route it to other systems, while maintaining the original formatting of government and customer forms. Relying on paper forms, Oscar W. Larson personnel battled extensive manual processing, frequent return trips to the back-office, and frustrating payroll inefficiencies.

Solution

With GoFormz, Oscar W. Larson leverages digital forms to complete energy audits from any location, and instantly provide prospective customers with a sales proposal – allowing sales reps to secure sales faster and more consistently. Work orders can now be dispatched to field teams pre-filled with project data, then automatically sent to a document management system upon completion, kicking off additional tasks if necessary. Via a direct integration, timesheet and payroll data can now be seamlessly passed to HR systems, streamlining payroll and billing processes.

Results

- An increase in sales by \$10M via faster bids and instant calculations
- A savings of 20-25 tons of paper and counting using mobile forms
- Automated payroll and billing processes eliminate rekeying and save time
- Streamlined and automated payroll results in savings of \$300,000 in annual labor costs
- Simplified government collaboration via the preservation of original document formatting
- Work order automations save time, accelerate back-office processes, and result in wider data availability

Why GoFormz

“GoFormz is the most robust forms product on the market right now. No one can do what GoFormz can do.”

– Aaron Slack, CTO, Oscar W. Larson

About Oscar W. Larson



Founded in 1946 to serve the petroleum industry, Oscar W. Larson Company now provides the automotive, airline, marine, restaurant, convenience store, and service industries with contracting solutions for all project needs. Oscar W. Larson has a strong commitment to customer satisfaction, and proudly offers customers the best Service Department in the industry — available 24 hours a day, 7 days a week.

The Full Story

Time to modernize

With hundreds of employees servicing the midwest, Oscar W. Larson generated thousands of physical documents when relying on paper forms. These forms required a lot of manual processing, resulting in steep labor costs and detrimental delays. “There’s only so much paperwork we can process,” explained Pete Wayne, CIO of Oscar W. Larson. A more modern approach to data collection was needed.

The need for a digital transformation was especially apparent for daily tasks like the employee timesheet process. Once an employee had clocked their hours, another employee would then need to manually re-key each entry into the WennSoft HR system — to the tune of 100,000+ entries each year. Time wasted processing paper forms prompted Oscar W. Larson leadership to seek a more modern, efficient solution to their outdated documentation and processing.

“We looked at pretty much every forms solution on the market – we left no stone unturned,” recalled Aaron Slack, CTO of Oscar W. Larson. Upon discovering GoFormz, Oscar W. Larson quickly realized the powerful opportunity to improve countless workflows across their

organization. “Starting out with GoFormz was really exciting. When we got started, we didn’t want to stop. It almost felt like I was working hand-in-hand with GoFormz, because as soon as I found something that we could potentially do, GoFormz was really willing to help us do it.”

The fact that GoFormz mobile forms preserved the look of Oscar W. Larson’s original paper forms made the company-wide adoption of the GoFormz platform much easier. “We were able to take every paper form we had and import it into GoFormz, and use them in a more modern way,” Aaron explained of the implementation process. “This improved our mobile adoption rate. We had a lot of technicians who really weren’t sure about going mobile, and because they now get to hold the form that they know in their hands, this softened the blow.”

Timesheet improvements: Automated efficiency

With GoFormz, Oscar W. Larson’s brutal timesheet processing has been significantly streamlined and simplified. Once a timesheet is completed, GoFormz automatically updates Oscar W. Larson’s HR system with recorded employee hours. “The technicians go out to complete the list of calls they were given for each day. They select the date and time, and the mobile form calculates everything for them and gives them the total time,” Aaron explained of the now digital timesheet process.

“Once they hit submit, this information goes into the GoFormz backend, and every day we run a report using GoFormz Reporting, which then populates a CSV file, which is then uploaded into payroll.” Wayne estimates this new process has saved Oscar W. Larson nearly \$300,000 in annual labor costs.

“The in-house mobile app we use now directly integrates with GoFormz,” Aaron added, detailing how Oscar W. Larson’s timesheet process has been further optimized to meet their evolving needs. “Throughout the week employees can look to see if they have submitted timesheets for each day, and they can also look to see their hours of payroll... now there is transparency for the guys to see how much money they are going to make.”

“Payroll loves this process. This alleviates tons and tons of work for them, and allows them to see exactly what work has been completed,” Aaron emphasized. “We have eliminated well over a million entries over the last three years, on the payroll side. That’s over a million keyed-in entries that we no longer have to do.”

Energy Audits: Strike while the iron is hot

Oscar W. Larson frequently sends sales reps to perform energy audits at customer sites. During the audit, reps complete a form that spells out the kilowatt and cost savings of replacing light bulbs and using alternative sources of energy. Relying on paper forms

to complete these audits, sales reps had to return to the office to run calculations, print a proposal for signing, and return to the customer — all before securing a sale. This process was not only time consuming, but also left room for human error while completing calculations, and hindered sales reps from immediately securing a sale once a customer was interested.

With GoFormz, an audit can now end with a signed contract, instead of a trip back to the office.

“There are lots of mobile forms solutions that can capture data on mobile devices,” Pete explained. “Only GoFormz gave us the features we needed for our sales reps to automatically calculate a customer’s savings AND generate a professional-looking proposal they could sign right then and there.”

Automated Work Orders

With mobile forms, the Oscar W. Larson Company has also drastically improved their Work Order process. Field teams are now dispatched a Work Order form, auto-populated with a job’s details. Once all of the necessary information is gathered, a customer signature is collected, and the employee notes whether or not a return trip is needed and if the job has been paid.

When the form is completed, the form data and PDF are routed to a document management system, and multiple automations are triggered based on the

form data — if the mobile form indicates that a return appointment is necessary, an additional appointment is scheduled; if this was the final appointment needed, the job will close out and signal Billing to initiate the payment process. Finally, the history of work completed will be documented, including a description of work, the resolution for the call, and a PDF number, allowing job details and documents to be rapidly referenced.

With over 350 Work Orders completed daily, this streamlined digital data collection and processing has saved Oscar W. Larson incredible amounts of time. Oscar W. Larson stores over 2.5 million documents in its DocLink content management system. With GoFormz, they can leverage that investment because all forms completed via GoFormz on mobile devices are automatically saved to DocLink. Additionally, all GoFormz fields and properties are mapped to DocLink, making the form data searchable along with other content in the system.

The GoFormz advantage

Oscar W. Larson's technicians often perform onsite inspections and maintenance checks at customer sites. Mandated by the EPA, these inspections are performed at a granular level with a 6-page form provided by the government. Technicians must include pictures and comments, and the completed form must

look like the original. GoFormz is the only mobile forms solution with the ability to preserve the exact look and feel of a user's forms, allowing Oscar W. Larson to easily maintain the original layout of the document.

"We've always loved GoFormz because we do a lot for the government, and customers who have mandated forms. So by using the GoFormz platform we're able to take their form and use that and send it to the customer or government, and it looks exactly like they want it."

Another advantage of leveraging GoFormz are 'nested roles'. Oscar W. Larson employees often take on niche responsibilities, requiring access to forms and data that their job description might not typically require. With GoFormz, these individual permissions can be easily managed, granting them access to the specific forms and data sources they need to complete their jobs.

"We couldn't live without GoFormz."

ROI: Increased sales by \$10M

"Now that the cat [GoFormz] is out of the bag, we can't create forms fast enough," jokes Wayne. With GoFormz, Wayne estimates that Oscar W. Larson has generated \$10M in sales, due to increased productivity and a faster, more accurate bidding process —not to mention the competitive edge they've gained by using

mobile devices to generate complete, professional, government-approved forms.

GoFormz has also helped Oscar W. Larson significantly reduce its reliance on manual resources like paper, leading to the savings of eleven tons of paper from the Work Order process alone. With 700 to 800 forms completed daily, the total resources saved via digital data capture is even greater. "If you wanted to figure out how many tons of paper we've actually saved overall with GoFormz, it's probably around 20 to 25 tons," Aaron estimated.

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What's next?

Aaron plans to continue digitizing forms to meet the changing needs of the Oscar W. Larson team, while also continuing to optimize their digital forms collection with integrations and automations. Currently Aaron and his team plan to configure their account to extract photos from forms and route them to customers without the original documents. "Often customers just want the pictures, so we're looking into ways to only extract the image and send it without the form."