Suburban Pest Management saves time and money by improving sales process with more accurate data

INDUSTRY
Pest Control Management

CUSTOMER SINCE
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FORMS
- Sales Agreements
- Job Proposals
- Inspection Checklists
- Waivers
- Estimates

At-A-Glance

Challenge
Sought a mobile forms solution that could centralize information flow, and provide consistency across the field inspection team's job proposal and sales agreement processes, to help eliminate costly errors.

Solution
Implemented the GoFormz Platform, allowing the company to upload a daily leads database that auto-populates important customer information directly into forms that the field inspectors complete on their mobile phones and tablets.

Results
- Achieved consistency across all field inspector forms, reduced manual errors, and ensured accurate customer information

- Simplified sales reporting by leveraging GoFormz to instantly generate detailed reports based on the daily sales agreements completed by field inspectors

- Saved both time (at least 20 hours per week) and money by streamlining the form submission process through the GoFormz auto-email and cloud storage features

Why GoFormz

"GoFormz had a nice, easy to use demo and it was very seamless to get everything setup and rolled out!" – Bill Somerville, General Manager

About Suburban Pest Management
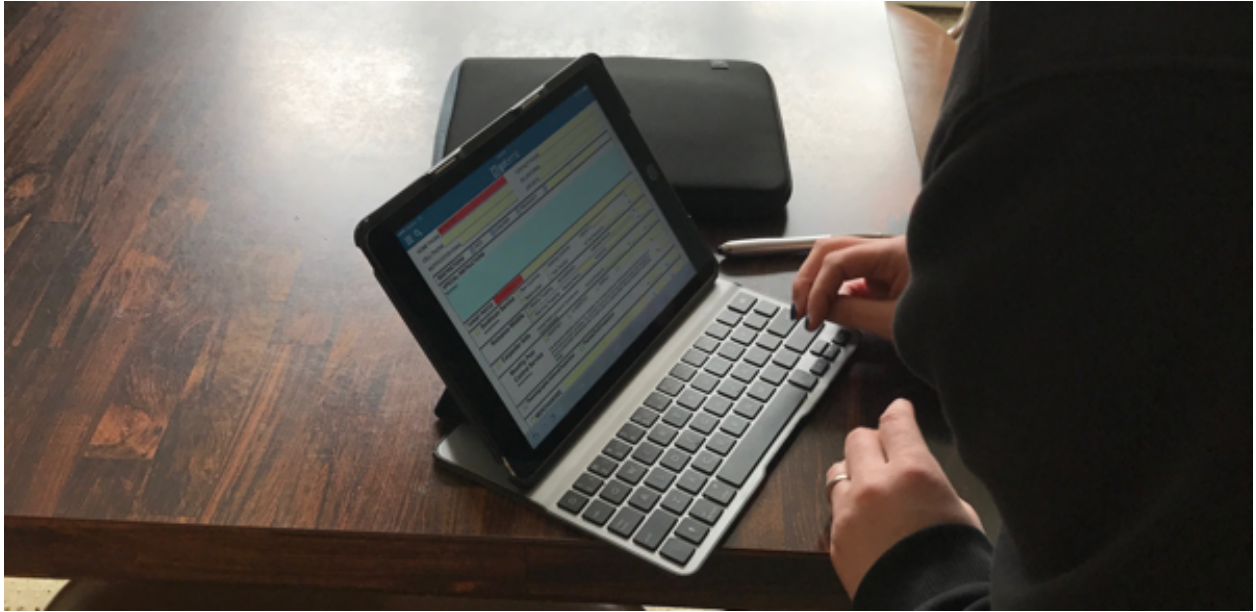
Suburban Pest Management has been providing their professional services in all phases of pest control to homes and businesses in Long Island, NY since 1960. They have built a strong reputation in their community for providing the best customer service—truly standing by their motto, "Work as a team and have one goal…Customer Satisfaction!"

The Full Story

Bill Somerville is a person who is constantly searching for ways to improve the way his company conducts business. When looking into how his field inspectors were completing job proposals and sales agreements for customers, he quickly realized that the current processes were filled with inconsistencies and identified many instances where costly mistakes could be made. Bill noted that he often would see inaccurate customer information and incorrect pricing. He also did not like how long it would take for a form to go from being filled out at a customer call, to being handed in to the office records for processing.

"We just wanted a better solution for staff in the field and wanted to look more professional in front of our customers." –Bill Sommerville

Thankfully, after some research, Bill came across GoFormz. Already using an electronic PDF mobile application for some of his forms, he had a good idea of what GoFormz could potentially offer

him. After signing up and starting his free 14-day trial, he quickly realized he could accomplish much more with GoFormz than his current PDF mobile application. Bill wasted no time and dove right in.

"GoFormz had a nice easy to use demo. It was very seamless to get everything setup and rolled out" –Bill Sommerville

When Bill had Suburban Pest Management up and running on GoFormz, his first project was to tackle the sales and quotes processes out in the field. To do this, Bill instituted a procedure where one of his teammates would upload a mini-database of each day's customer prospects. These databases would contain important customer information and pricing details that would automatically populate the forms based on an account number selected by his field inspectors. This led to more accurate data and avoided opportunities for human error, such as inaccurate pricing or missing information. The field inspectors loved this new process, as it sped up their form completion times and allowed for offline use when working in areas with little to no service.

"The other thing that really made me go with GoFormz over anybody else was the ability to work offline." –Bill Sommerville

Bill and his team continue expand their uses of GoFormz within their business. One of these use cases is how they leverage the GoFormz Reporting Tool. Before GoFormz, field inspectors would have to complete a separate form, a lead sheet, indicating their daily activity. Information included in this type of form would either be sales figures that they made or completed quotes. Since they were already completing sales agreements and quotes on the GoFormz platform, this data was already being captured. Bill simply setup a daily report that would present all this data to him in an easy to read and consistent manner.

"I already had that information filled out. I just needed a way to retrieve it. So I put together a quick report in GoFormz where it would give me all of the information that I needed, pulled from the agreements already filled out. And the field techs did not have to come into the office and turn in another form."

Since implementing GoFormz, Bill has already seen great results. His team has become more efficient with the newly revamped and streamlined sales and quotes processes. Also, form completions and submissions are faster and unnecessary steps like physically handing in a form or faxing it to the office have been eliminated. Most importantly, Bill and his team have achieved a new level of data accuracy — no more incorrect customer information, no more inaccurate pricing, and no more illegible handwriting. When asking Bill to put a number on his savings he said, "With many different people on my team touching these forms, I think together we save at least 20 hours a week."

Bill and the rest of the Suburban Pest Management company are very pleased with how GoFormz has transformed their form processes, as well as with the ways that GoFormz has helped them increase their customer satisfaction.