



Commercial painters save both time and money by digitizing their paperwork

**INDUSTRY**

Painting

**CUSTOMER SINCE**

July 2015

**FORMS**

- Change Orders
- Materials Order Sheet
- Estimates
- PTO Requests
- Employee Incident Forms
- Monthly Vehicle Checklist

# At-A-Glance

## Challenge

Needed to replace manual paper-based documentation processes with an automated and digital solution. Existing systems were inefficient and often delayed, due to lost forms or failure to submit documents in a timely matter.

## Solution

Implemented GoFormz to transform their old paper forms into smarter, digital versions. This modernization made for a more effective and convenient workflow: allowing teammates in the field to instantly access, fill-out and submit forms faster, while helping office managers improve record-keeping and data storage.

## Results

- Ensured all materials needed for a project were ordered and delivered on time
- Created an easier process for teammates to add additional services and costs to a project (when requested by customers at project sites)
- Facilitated more effective documentation of employee incidents, PTO requests and other HR related events
- Eliminated manual form submissions and unnecessary trips to the office (saving time and money)

## Why GoFormz

*“What really drove me to GoFormz, besides the price, was the fact that I could take the forms that my guys are familiar with and easily create mobile versions.” –George Williams, Director of Inside Operations*

# About A.G. Williams Painting



Founded in 1906, A.G. Williams Painting Company continues to provide professional residential and commercial painting services to customers around the New York City area. Since its inception, the company has prided itself on building strong relationships with their teammates, customers and community.

# The Full Story

In early 2015, George Williams, the Director of Inside Operations at A.G. Williams Painting, became frustrated with the process of ordering and dispersing project materials. The system in place relied on crew leaders to fill-out, complete and then manually submit material order forms to the office. Burdened with paper-based documents, forms were often lost, delayed or frustrating to use in the field — requiring handwritten completion and manual deliveries that were difficult to complete in a timely manner. This antiquated process was clearly inefficient, prone to errors, and due to be modernized.

*“We were stuck in the old paper trail system.”*

Identifying that paper forms were slowing his teammates down, George sought a better solution to fix his problem. After searching the term ‘Paperless Systems’ George came across a few mobile form solutions including GoFormz.

*“I was just Googling paperless systems and a few companies popped up. I noticed some of the other companies [first], but they were expensive! GoFormz offered a more affordable alternative for companies who just wanted to try it out to see how it went. After we got into the GoFormz product, it was great and it just took off!”*

## New, But Different

Price was not the only deciding factor for George to choose GoFormz over its competitors. As a 111-year-old company with deeply established existing documents and processes, George saw that GoFormz offered a unique opportunity to modernize their company, while preserving familiar, legacy components. This digital transformation (without the need for a complete overhaul and retraining) was something other mobile form platforms could not provide.

*“What really drove me to GoFormz, besides the price, was the fact that I could take the forms that my guys are already familiar with and easily create mobile versions. A lot of the other companies wanted to recreate the form and make it fit their program. The way*

*GoFormz does it just makes it seamless process."*

After signing up for the GoFormz free trial, George wanted to start off simple. His materials order sheet was quickly digitized and he showed it to a few of his crew leaders. After realizing how much faster they could complete the form and submit it without any hassle, they were sold.

*"I thought convincing the owners was going to be hard because they are old school, but showing them it was identical to current forms sold them. Now they love it!"*

#### Gift That Keeps on Giving

After finding success with their first mobile form, George started to switch more over to the GoFormz Platform. He soon discovered how simple and easy it was for him to digitize forms.

George has also used GoFormz to address many issues of existing business processes. For example, teammates in the field often faced opportunities to offer additional services to customers, but did not have the appropriate forms with them to provide an estimate and get the

customer's signature approval. GoFormz was the perfect solution for these instances.

*"We were going to jobs and doing projects. Sometimes we would do more work than what was part of the original scope and sometimes when it came down to billing, the client would say they never approved it. With GoFormz, we can now have our guys easily pull up a form when a customer requests additional work, have them estimate the labor and cost, then have the customer sign off on it. Creating a digital record of the new agreement and instantly emailing it to the customer and our teammates in the office."*



GoFormz has also helped resolve pain points within A.G. Williams' HR and administrative tasks — empowering their team to mobilize Employee

Discrepancy forms, Safety Incident forms, and Vehicle Inspection forms. Their greatest digital feat, however, has been the implementation of new PTO forms.

In the past, taking time off was an extremely disorganized task. Some teammates would just let crew leaders know that they would be taking off on a specific date, but nothing would be written down or crew leaders would forget. Resulting communication errors would then lead to the wrong staff members at projects — an unacceptable and costly mistake. With GoFormz, teammates now fill-out PTO forms on their tablet or smartphone, which is then instantly sent to the office to be recorded and tracked upon completion.

#### Tip of the Iceberg

Now, A.G. Williams Painting Company is all in on going mobile, as George continues to look for ways to improve their form processes using GoFormz. With a few forms lined up for George to create (such as a Property Damage form and pre/post project Walkthrough

forms) he looks forward to exploring more GoFormz features. For example, he wants to start using the GoFormz reporting tool to gather insights on his jobsite data. George is also looking into the GoFormz List View feature to help his teams that fill out forms on smaller screen devices (like phones).

All in all, George and his teammates at A.G. Williams Painting Company are very happy with their switch to mobile forms. Life for teammates both in the office and out in the field has become easier and more efficient. When asked how much the company saves with GoFormz, George said, "I can't put a number to it, but GoFormz is a huge time saver!" Overall, George is thrilled to have implemented such positive changes, adding new promise to over a century's worth of operational success.

*"It's been a real smooth process and the GoFormz interface process is easy to use. Our guys love it."*