

# DESHAZO

CRANES / SERVICE / AUTOMATION

Digitizes their forms with GoFormz, allowing them to include images and to consolidate their forms collection.

## INDUSTRY

Machinery

## CUSTOMER SINCE

December 2012

## FORMS

- Service Tickets
- Inspections
- Time Sheets

# At-A-Glance

## Challenge

Needed to digitize their paper-based forms in order to better capture onsite details with new data types, and to support their rapid growth.

## Solution

Digitized their forms with GoFormz, allowing them to include contextual, visual data (photographs) in the forms, and to better consolidate all of their forms collection.

## Results

- Simplified the capture of new, visual data types – improving client communications
- Easily include images on forms, using cameras on tablets or phones
- More consistent branding on client-facing forms across every location
- Expedited data entry via barcode scanning and database fields
- Elevated insights resulting from the increase of gathered field data
- Refined billing cycles with referenceable PDFs and automations
- Improved searchability of forms via cloud storage
- Optimized efficiencies and responsiveness

## Why GoFormz

*“...the flexibility that we’ve had with GoFormz we couldn’t replicate anywhere else.” - Tray Ivey, President of DESHAZO’s Service Group*

# About DESHAZO



DESHAZO is a family owned company that designs, manufactures, installs and services overhead cranes and automation systems. Cranes are custom-built for each client's needs, including powerful automation controls and expert servicing. With over 25,000 cranes in operation DESHAZO has enjoyed successful and rapid operational growth, expanding their offices and team across the nation.

# The Full Story

DESHAZO provides industrial equipment design, manufacturing, installation and maintenance services, tailored to each of their clients' individual needs. DESHAZO boasts twenty offices and counting, with many technicians working onsite. The mobile nature of DESHAZO's team made working with paper forms complicated – forms needed to be completed at heights and failed to incorporate visual fields, like images. "We had made a commitment from a business standpoint to grow our field service operations," Tray Ivey, President of DESHAZO's service group, explained of their initial need for mobile forms. "...at that point we were doing most of that in paper based checklists and forms. We realized we needed to do more, particularly to capture photographs in the field."

## Taking Forms to New Heights

Mobile forms drastically simplified the capture of jobsite images, as well as the communication of project needs to clients. Before GoFormz, the DESHAZO team was "inspecting equipment installed at heights..." which impacted a technician's ability to fully

communicate a situation to customers. "Most of the time we were unable to show our customer the exact situation, we could [only] explain it to them verbally..." Tray recalled. Now, technicians working on cranes can easily include an image of equipment damage in their form, using their device's native camera, and even add annotations. This means that rather than simply describing a project's needs to clients, DESHAZO personnel can include an image to illustrate captured data.

## Digital Consistency

Tray and his team rapidly grew the number of forms, Templates and users in their GoFormz account, which now includes over 220,000 forms. As they welcomed new offices across the country, the DESHAZO team noted irregularities in forms from location to location. In an effort to standardize documentation and provide a more consistent brand presence to customers, DESHAZO management used GoFormz Templates.

"...we want those service tickets, those inspection reports, those deliverables to be consistent across the board at each of our customer facilities, we weren't able to do that with paper-based,

locally printed forms.” - Tray Ivey,  
President, DESHAZO Service Group

Another exciting digital optimization were mobile Service Tickets. DESHAZO's Service Tickets are completed daily across every location, by each onsite technician. As DESHAZO employs nearly 200 technicians and a Service Ticket is needed for each project, having a digital version provided an opportunity to simplify the creation and processing of the large number of incoming forms. Two versions of the Service Ticket were created; one which leveraged Barcode scanning to instantly fill relevant database fields, and another utilizing Drop Down menus prefilled with options. Both of these solutions reduced inaccurate data entry and streamlined document sharing and storage.

The digital Service Ticket includes a plethora of critical project information, including the reason for the technician's visit and time spent onsite. "Once that customer signature is captured and that form is marked completed, based on the group in which that tech is a part of, the form is routed accordingly," Tray detailed. This means a vast improvement of processing and

efficiency, as based on the technician's DESHAZO location, a form is routed to that corresponding location's office administrator. Once a Service Ticket is received, the back-office can begin the billing process. The invoice sent to customers from DESHAZO includes an attached PDF of the completed Service Ticket, so that customers can reference work details when completing the payment process. "The Invoice and the Service Ticket go hand in hand... it makes for an easy close out on our end and an easy payment process on their end."

#### Impactful Savings

DESHAZO has realized significant time savings and improvements in efficiencies since digitizing with GoFormz. "Over the years we've look at several options, from custom apps to off-the-shelf industry specific solutions... honestly the flexibility that we've had with GoFormz we couldn't replicate anywhere else."

Tray emphasized GoFormz' impact on DESHAZO's success, expressing the incredible value of improved data collection in terms of more accurately measuring progress and adding value to services. "What we see from a

business improvement standpoint, when we are working with multiple facilities and multiple customers every single day throughout the country, the ability for us to have one central area of document storage that we can go search is extremely valuable to our customers, and is extremely valuable to us," Tray explained of GoFormz' impact. "All those things that were archaic and difficult... that made it difficult for us to be proactive and extremely responsive." Now, with GoFormz, DESHAZO can more

seamlessly prioritize the efficiency, proactiveness and responsiveness their customers rely on. "We've had no shortage of growth over the years. I don't think we would have the demand that we were having in the marketplace if we weren't efficient, and GoFormz has added a lot to our efficiency."