



## Vegetation Management Company Improves Data Accuracy and Eliminates Paper Waste with GoFormz

### INDUSTRY

Vegetation  
Management Services

### CUSTOMER SINCE

November 2016

### FORMS

- Tree Trim Reports
- Herbicide Spray Reports
- Timesheets

# At-A-Glance

## Challenge

Sought to eliminate the time-consuming use of “paper and pen” reporting by field teams. The company wanted to adopt a more modern and efficient digital mobile forms solution that would allow information from crews to be received by supervisors on a daily basis instead of weekly.

## Solution

Converted all of the company’s field reports from paper to digital forms, using GoFormz. After immediately experiencing positive results, they quickly converted the rest of their paper documents into mobile forms, eliminating paper waste across the company while digitizing their operations.

## Results

- Increased form processing times for supervisors, allowing them to better manage their team’s time
- Increased data accuracy through the implementation of *Auto Calculation* fields that perform crucial mathematical equations on specific forms
- Improved visibility into work completed by remote teams — no longer needing to wait until end of week updates
- Achieved a completely paperless overhaul throughout the company, eliminating paper waste and gaining digital efficiencies
- Reduction of errors in submitted forms

## Why GoFormz?

*“I decided to go with GoFormz because I could use the reports (forms) I already had and that my team was already familiar with. It was just so easy to create.”*

*—Rusty Lewis, Supervisor, Northeast Rural Services*

# About Northeast Rural Services



Northeast Rural Services was established in 1996 as a subsidiary of the Northeast Oklahoma Electric Cooperative. Since their inception, they have been providing customized vegetation management services for many electric cooperatives and other private commercial customers. Some of the expert services they offer are mechanical tree trimming, herbicide application and bucket truck services. All which are customized to best meet the needs of their customers.

NRS prides themselves in the quality of work they provide and the expertise that every person on their team offers. If you were to ask someone on their team to describe the identity of the company they would answer, "Excellent Quality, excellent service, excellent value. That's Northeast Rural Services."

# The Full Story

When you have up to 20 teams in the field, each completing anywhere between 4 to 8 forms daily, using paper forms are not the most effective approach. Especially when the services you offer require extensive documentation and are mostly away from the office in remote areas. Using paper forms means that your company will endure lots of delays, missing forms, and tedious and manual form processing. These problems can lead to lots of headaches and costly expenses that can easily be averted by using digital forms. Just ask Northeast Rural Services.

## Drowning in Paper

Rusty Lewis is a supervisor at Northeast Rural Services (NRS) and if you spend just a few minutes talking to him about his job you can hear the excitement in his voice. But if you asked him how life was *before* GoFormz you will hear his tone change. That's because before GoFormz, NRS documented all of their services with paper forms. This meant that supervisors needed to manually review, process and approve paper reports before they could be submitted

to the office. This process caused delays and wasted tons of time, creating inefficiencies in their workflows.

***"Before we used GoFormz, all of our reports were completed with pen and paper. Teams would complete their forms daily, but supervisors couldn't see them until the end of the week on Friday or on some occasions not until the following Monday." –Rusty Lewis***

Since most NRS teams worked in different locations, it would take long periods of time before supervisors received all of the forms. This led to delays, poor time management, and many other inefficiencies.

***"It was hard for us because corrections needed to be made at jobsites and we needed to call our guys in the field to update them. But the delays in form submissions made this difficult." –Rusty Lewis***

Receiving late forms from the field was already hard to deal with, but receiving all of them at the same time made it even worse. Supervisors would need to process anywhere from 40 to 160 forms at the same time! This led to lots of time wasted on manual form processing that

was hard for supervisors. Clearly there had to be a better way to do this.

### Keep it Simple

Management at NRS knew it was time to find a better solution to their current document processes. They had one of their teammates start searching for an answer.

*“When we decided to shift to electronic forms, our administrative assistant got in touch with AT&T and they tried to build us a new program to help us.” –Rusty Lewis*

The program that was built for the NRS team was not what they wanted. Not only was it something completely unfamiliar to all their teammates, but it also was filled with unnecessary information that confused some people.

*“It was not what we wanted. When we completed one of the forms, the program would print 9 pages of information that we could hardly understand!” –Rusty Lewis*

Although the first attempt was not the right solution for NRS, it did not discourage the team from continuing to

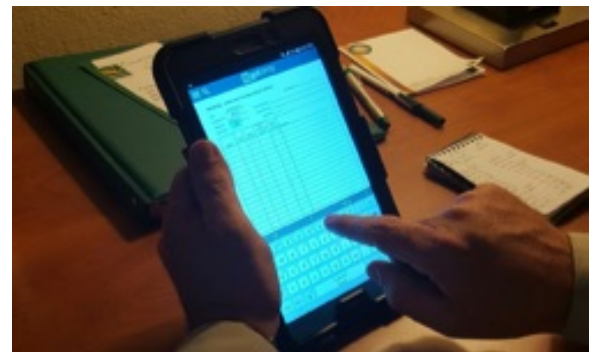
search for something more geared to their needs.

### Rusty, The GoFormz Guru

With the approval of his manager, Rusty took it upon himself to find the solution they needed. Thankfully it did not take him long to discover the GoFormz Mobile Forms Platform.

*“I simply typed on Google ‘Electronic Reports’ and GoFormz popped up.” – Rusty Lewis*

Rusty immediately knew that he had found what he was looking for.



*“I read all the reviews and the key thing that got me was I could use the reports (forms) that I already had and that my team was already familiar with.” –Rusty Lewis*

Rusty signed up for the GoFormz free trial and converted his toughest report form to digital first.

***“Once I understood how easy it was to drag and drop fields, I completed my first report in no time. It was just so easy to create!” –Rusty Lewis***

Rusty took this new digital report form and showed it to his management team, the other supervisors and their accounting department. They were happy that it was identical to what they were already using. He was then give the green flag to test it on two tablets out in the field to see if they could observe improvements to their workflows.

***“We started with two tablets and within just a couple of weeks, guys were calling us and letting us know they loved it!” – Rusty Lewis***

#### We Got Our Answer

It did not take long for the NRS team to see benefits from their new mobile form

process. Teammates were completing forms faster and more accurately. Number crunching was a thing of the past. Signatures were never missed again. Plus, there was no need to worry about losing forms since they were all in the Cloud and easily accessible. Supervisors now had nearly real-time visibility into their team’s daily activity. They immediately received all forms as soon as they were completed (instead of waiting until the end of the week) and could simply do the necessary paperwork on the drive back to the office.

***“One crew leader said that he could now have another guy drive to the office and he could complete his paperwork in the passenger seat. Meaning that he could clock out as soon as he got back to the office and go home to spend more time with his family.” –Rusty Lewis***

After seeing the success from the implementation of the first two iPads, the NRS team now has dozens of iPads in the field (one for every team) for filling out mobile forms. They have completely overhauled their old form processes and no longer use any paper forms. They now use GoFormz for their

Spray Reports, Tree Trim Reports, timesheets, and many more forms.

All of their forms benefit from some of GoFormz' best features. For example, on their Spray Report, used in the herbicide application process, they have implemented smart logic in their forms to automatically calculate how much herbicide is used and automatically deduct it from their chemical inventory. This was something that had to be manually calculated in the past.

#### What's Next?

The NRS team continues to explore other ways they could apply GoFormz to make their day-to-day easier. One area they are looking to improve is the last step in their form processes — syncing the information from their reports into their company's CRM.

*"We have been looking to use an integration to allow our forms to populate data straight into our CRM. Currently we just save our forms into it so we always have a copy in there to reference." –Rusty Lewis*

Rusty and the NRS team could not be happier now that they switched from paper reports to digital versions through GoFormz. Their lives have become so much easier and they love all of the time savings they experience.

*"We do not have any paper reports anymore. We shredded them all. We are totally electronic." –Rusty Lewis*