



HL Training Services uses GoFormz to streamline the collection of customer and training course data, significantly expediting the processing and distribution of training certificates.

INDUSTRY

Field Service

CUSTOMER SINCE

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FORMS

- Counterbalance & Reach Truck Forms
- Risk Assessments
- Equipment Authorizations

At-A-Glance

Challenge

HL Training Services needed a digital platform to accelerate the completion of forklift training course paperwork. Relying on paper forms, course paperwork often took weeks to complete and deliver, delaying the training certification process.

Solution

After testing several mobile forms platforms, HL Training Services selected GoFormz for the completeness of its feature set. With digital forms, critical course paperwork can be completed and accessed in real-time, enabling the HL Training Services team to process certifications within a day.

Results

- Real-time data decreases training certification processing time from roughly two weeks to one day
- Auto-populated form fields accelerate form completion and improve accuracy
- Digital signature boxes simplify client authorizations
- Online form builder streamlines Template edits and document changes
- Automatic Calculations instantly add up test scores, expediting form completion

Why GoFormz

“Because our forms upload in real-time, we can now complete our side of the administrative process within the same day.” – Shane Richardson, HL Training Services Director

About HL Training Services



HL Training Services is a Bristol-based company, providing training for forklift operators and instructors since 1988. Offering services across the United Kingdom, HL Training Services instructors strive to improve the health and safety of their clients' employees via experienced instruction and both onsite and offsite training.

The Full Story

HL Training Services, provides training and certification to forklift operators and instructors, often onsite at their place of work. HL Training Services' forklift certification process originally relied upon paper forms — often more than seven pages long — which required the entry of redundant data, the manual completion of calculations, and other time-intensive, error-prone tasks. These paper forms then needed to be mailed or scanned to the back office before a certificate signifying an individual had completed the course could be distributed. This process took far too long and relied upon instructors completing their paperwork efficiently. Consequently, when customers would ask for their certificate within two weeks of completing their course, it was often impossible to complete their request because the necessary paperwork had still not been delivered. "We weren't getting the paperwork back in time to meet our customer's needs," explained Shane Richardson, an HL Training Services Director.

Shane and his team began searching for a solution to their paper-based obstacles. After a frustrating experience with another digital form provider, HL Training Services trialed three mobile form platforms, evaluating each service's feature set to

ensure they would meet their needs. In the end, HL Training Services selected GoFormz, citing its ease of use and robust feature set for their decision. "GoFormz met each of our needs - the others, at best, only met half of them," Shane recalled. "It would have been a silly decision to pick any other [platform]."

Digital transformation

The first mobile form created by HL Training Services was also their most critical. The Counterbalance and Reach Truck (CBRT) form spans seven to ten pages, and captures a plethora of training details. The CBRT form includes course candidate's personal details, the course training covered, practical and theory test results, pre-shift truck inspection information, and more. "It's the entire training record for a candidate, for a course," Shane explained. For this reason, it was critical that HL Training Services' chosen digital form platform would be able to support the variety of data types necessary to complete the CBRT form. "If it didn't work for the CBRT form, it wouldn't work at all. And it worked perfectly."

Shane and his team successfully digitized their CBRT form using GoFormz, equipping their digital form with Automatic Calculations, Checkboxes, Drop Down fields, and auto-fill logic. Now, if a user enters equipment information or candidate details into the form, that same information

is instantly populated into relevant fields throughout the document. This means that users no longer need to re-enter redundant information, significantly accelerating the form completion process. Leveraging Automatic Calculations, a candidate's practical test score is instantly totalled, eliminating opportunities for error and improving efficiencies. "This feature takes one extra task away from them... now they just have to check a box and it adds it all up for you."

Once a CBRT form has been completed it is instantly available to back-office administrators to download and process. This real-time data grants increased visibility into an instructor's progress, allowing HL Training Services personnel to resolve issues more rapidly.

"If there is ever an issue, we can actually look at a form as they are completing it."

GoFormz not only provided the set of field types HL Training Services required, but also simplified document changes and editing. With their previous digital form provider, Shane and his team would need to redo the entire CBRT form each time the document changed. "If you had an issue with a form, you had to redo the entire

form... and our forms are seven to ten pages long," Shane explained, detailing the time intensive process. "[With GoFormz], if your document changes, it's easy to make those changes."

HL Training Services also digitized their equipment authorization forms, as well as their risk assessment forms. These forms feature digital Signature fields for rapid authorizations, as well as Time, Date, and Text fields to accurately capture which equipment was operated and when.

Transformative efficiency

With their certificate processing reduced from approximately two to four weeks, to a matter of hours, HL Training Services can now provide more efficient service to their customers. "Time is costly in this industry," Shane explained. "Because our forms upload in real-time, we can now complete our side of the admin process within the same day."