



Petrol Services Company Automates Business-Critical Workflows with GoFormz

INDUSTRY

Energy & Field Service

CUSTOMER SINCE

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FORMS

- Preventative Maintenance Forms
- Task Sheets
- MS Calibration and Verification Forms
- Leave Applications

At-A-Glance

Challenge

Needed a digital solution to address the manual inefficiencies obstructing productivity throughout the Petrol Services Australia workflow.

Solution

Implemented GoFormz to automate time-consuming tasks (e.g. delivering paperwork) and business-critical workflows, resulting in significant time and financial savings.

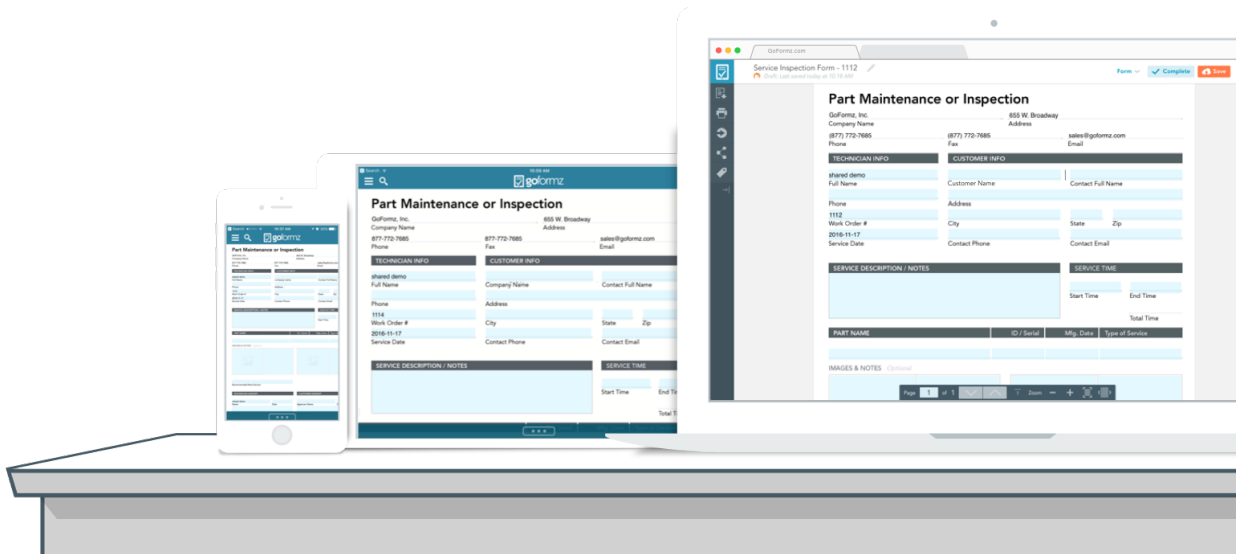
Results

- Instantaneous form routing to key-players and other business systems led to sales growth, without the need for additional administrative support
- Expedited data entry (due to drop down lists and data sources tied to form fields)
- Triggered events result in timely, consistent routing of data to critical business systems
- Significant time and financial savings

Why GoFormz

"[GoFormz] saves us around \$350,000 a year... it has allowed us to get more sales and work, without hiring more people."- Peter Burton, Systems Analyst

About Petrol Services Australia



Servicing all major oil companies in the Australian market, Petrol Services Australia (PSA) offers a total retail and commercial Petroleum solution. From repairs to installations, Petrol Services Australia prioritize a constant dedication to preventative maintenance and operational safety.

The Full Story

With 70 remote technicians working in the field, Petrol Services Australia (PSA) relies heavily upon collected jobsite data. However, PSA's original, manual workflow resulted in a variety of opportunities for delays. Paper forms were first emailed to technicians, which required each form to be printed, brought to a job site, filled out by hand, and then delivered back to the office, where gathered data would then be rekeyed into corresponding systems. This manual process was not only inefficient, but could hardly be optimized, due to the manual (yet crucial) nature of each task. Peter Burton, Systems Analyst at Petrol Services Australia, recognized that these manual inefficiencies could be digitally resolved and sought out a solution.

While conducting his search, Peter paid close attention to the user interface of each potential solution, keeping in mind that ease of use would be vital to user onboarding. When Peter found GoFormz, he made note of the platform's intuitive design and user experience, "It was pretty straightforward, I just uploaded the PDF and [added] fields to it."

After a promising trial, and positive feedback from his team, Peter was ready to implement GoFormz on a larger scale. "Far and away the biggest driver for us [in choosing GoFormz] is the ease of end user use," Peter explained.

"The basic template structure is very intuitive."

Effortless entry & routing

The first form Peter and the PSA team digitized was the Preventative Maintenance Task Sheet — a checklist of physical areas of the jobsite, signifying that each met safety standards. Previously, such a form would then require manual delivery by the technician. Now, with GoFormz event-triggered automation, completed Petrol Services Australia forms can be automatically routed to corresponding emails and systems. For example, when a technician enters a job number within their form, the completed form is then sent to a designated email address. The document is then attached to its corresponding job number within the particular, connected business system.

Pre-Populated productivity

One impressive example of Petrol Services Australia's newfound digital efficiency is the efficiency of their MS Calibration and Verification form. The Calibration form, which is completed for every petrol asset, records the amount of fuel dispensed and any discrepancies in the amount dispensed. For every Calibration form completed, a unique job number must be entered, along with the Technician's name, Technician's license number, the asset's location and asset details.

Before GoFormz, this Calibration data would have been manually entered, delivered and rekeyed, resulting in significant amounts of time wasted. Now, with digital forms and data, this information can be pulled from associated Data Sources, collections of previously captured information, that can now be pre-populated into corresponding fields. For example, if a PSA technician were to select their Employee Name from a drop down, their corresponding Employee License Number would then be automatically filled. For petrol assets, this means a model number could be selected, and the asset's serial number and other

relevant details, would then be instantly filled.

Serious savings

This automation has resulted in incredible time savings for Petrol Services Australia technicians. "It [takes] literally about a quarter of the amount of time [technicians] used to have to spend on data entry," Peter explained. With improved workflow efficiencies, the PSA team could spend the time they had saved on securing sales and seeking out new opportunities. "[GoFormz] saves us around \$350,000 a year," Peter remarked. "... it has allowed us to get more sales and work, without hiring more people."

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What's next?

With operation-wide GoFormz success, Peter and his team are now looking to further automate their processes and workflows.