



SGI Heating and Cooling utilize form sharing and conditional logic to streamline everyday business processes and enhance workflow operations.

INDUSTRY

HVAC

CUSTOMER SINCE

2017

FORMS

- Service Invoice Forms
- Employee Health Check
- Furnace and A/C Worksheet

At-A-Glance

Challenge

Prior to onboarding GoFormz, SGI Heating and Cooling utilized a paper form that acted as their single source of information. SGI wanted to improve its forms and data collection process, which required various team members to complete forms by hand and access certain pieces of information within a single document. Additionally, when clients would return, sales representatives were required to find existing client information in storage, resulting in loss of productivity, redundancy, and an overall inefficient workplace.

Solution

By digitizing their documents and leveraging conditional formatting features, SGI Heating and Cooling streamlined their team's everyday documentation processes, resulting in higher quality work for their clients and significant efficiency improvements in the workplace.

Results

- Improved relationship with The Home Depot as a "Service Provider"
- Increased quality of work by reducing opportunities for error
- Eliminated data entry redundancies
- Optimized client documentation and communication

Why GoFormz

"It saves us time in the office... it brings a higher level of quality to our work." - Sheri Vorhies, Administrative Assistant, SGI Heating and Cooling

About SGI Heating and Cooling



SGI Heating and Cooling is a “service provider for The Home Depot” as well as a leading service provider of HVAC and Generator services for lower Michigan and northern Ohio residents. Headquartered in Flint, MI, they service and install air conditioning, generators, hybrid geothermal systems, and more.”

The Full Story

SGL Heating and Cooling works tirelessly to ensure exceptional customer service while operating within 44 storefronts throughout northern Ohio and lower Michigan. SGL Heating and Cooling has struggled with limitations of their paper-based forms, which often hindered data collection, extraction, storage and prevented their team from working more efficiently.

Every day, SGL Heating and Cooling sales representatives take calls from new and existing customers requesting quotes for service and installation. This process originally relied on a single paper form to record and collect client information. This workflow frequently required SGL Heating and Cooling teams to search for existing client information or manually reenter redundant data – resulting in delays and miscommunication. This not only forced SGL Heating and Cooling’s team to allocate time and resources towards wasteful activities, but also required the hand-delivery of forms and information from field representatives and technicians, adding further inefficiencies to workflow.

With hundreds of forms being filled daily, this process needed to evolve, prompting SGL Heating and Cooling to seek out and implement the GoFormz platform as their digital forms solution.

Single Point of Data Entry

When Don Green, Operations Manager, and Sheri Vorhies, Administrative Assistant, joined SGL Heating and Cooling, their primary focus was simplifying the existing operation processes. “Since joining SGL, our focus has been on establishing a single point of data entry and being able to leverage that information throughout our entire workflow,” explained Don. To jumpstart this process, SGL Heating and Cooling leveraged GoFormz to create a comprehensive, digital worksheet for their sales team.

This digital furnace and A/C worksheet, which evolved from SGL’s legacy paper form, utilizes various GoFormz features to simplify and enhance their data collection. One such feature is *Database tables equipped with Conditional Logic*, allowing sales representatives to showcase different pricing modules for clients evaluating units and pricing options. *Image* and *Sketch* fields are also included, allowing users to include visual guidance for where generators

should be placed – providing easy-to-access documentation for installation managers. This digital furnace and A/C worksheet is also optimized with logic to enforce data capture rules and ensure critical fields are completed before a form is submitted, eliminating opportunities for missing information. “There are required fields that are set in stone that [sales representatives] can’t continue on without filling them in, otherwise messages come up if there is wrong or incomplete information. That alone has been a major time saver for us”, explained Sheri.

Once a form is completed by a sales representative, it is then exported into a PDF document and dispatched to all collaborating team members for their review, in real-time. This optimized data collection process has eliminated inefficient workflows, installation delays, additional steps to procedures, opportunities for missing or lost data, and frustrating record-keeping.

“I give kudos to the [professional services] team because they are always available to help. They will answer any question and if they don’t know the answer, they will find someone who does right away.” - Sheri Vorhies, Administrative Assistant

Improved Relationships

One of the more impactful and important benefits of digitization has been the improved relationship between SGI and The Home Depot. SGI Heating and Cooling is a service provider for The Home Depot, which provides businesses opportunities to grow their client base and secure consistent work. While maintaining a single point of data entry, SGI implemented additional pages within their worksheet specifically dedicated to the various promotions put on by The Home Depot. At the point of sale, SGI can now seamlessly connect the homeowner with the right The Home Depot personnel, ensuring the best customer service.

Streamline Form Sharing

Further streamlining SGI’s work with The Home Depot as a service provider is the ability to rapidly scan customers for COVID-19 symptoms before their appointment – a requirement of The Home Depot. To accomplish this, SGI Heating and Cooling leverages the *Public Forms* feature, which allows GoFormz users to post or share links to their digital forms with customers and collaborators outside of their account, to be filled out and completed. “Since we have appointment generators

physically in The Home Depot stores, and they require documentation of temperature checks and health conditions, I created a Public Form for our appointment generators to use to submit their health information,” explained Sheri. “So that we have it all on file should The Home Depot ever need to reference a specific person or date.”

ROI:

Digitally transforming paper forms has allowed SGI Heating and Cooling teams to monitor everything from daily health checks to sales calls in real-time, resulting in the simplification of their data collection process. With GoFormz, these comprehensive digital worksheets and health check forms are automatically emailed and distributed, and data is pulled to create a dashboard showing who has completed their work, and who still needs to.

SGI Heating and Cooling’s digital transformation has resulted in incredible

benefits for customer service and satisfaction, as well as in-house operations. Since implementing GoFormz as their single source of data collection, SGI has not only “increased sales representative accountability” but also “improved efficiencies and data collection”. In addition, forms are now completed more accurately and can capture data types that are unavailable within paper documents, like photos, sketches, and tables with *Conditional Logic*.

What's next?

SGI Heating and Cooling is currently working with GoFormz to implement additional platform integrations, like Quickbooks and Office 365, to eliminate redundancies and streamline their “single point of data entry” processes.