

CASE STUDY

# Gateway Mechanical cranks up productivity with ProntoForms

## **BUSINESS GOALS**

- Digitize data collection processes
- Reduce administrative costs
- Reduce paper consumption

## **RESULTS**

- 7-day invoicing compared to 30 days with previous processes
- Over 39 hours saved on weekly data entry
- Real-time dispatching of service tickets

## Gateway Mechanical Snapshot

- ✓ 300 technicians in the field
- ✓ 40,000 service tickets per year
- ✓ Western Canada service territory

### The Challenge

While Gateway Mechanical is a very successful and well known firm, it had one main challenge to overcome. Field technicians were generating 40,000 service tickets a year – all on paper. This resulted in considerable administrative costs. Technicians would have to either courier or drive paper forms back to the office. Then, once received back at headquarters, this collected data would have to be manually entered into the ERP system.

“We were looking at digitizing this process for a long time. The company looked at a variety of options, including developing an in-house technology. None of the solutions were appropriate,” explains Dave Herbert, Gateway Mechanical IT Manager.

On the executive level, the company knew that it simply couldn't keep the paper process status quo.

### The Solution

After Gateway communicated these challenges to its wireless carrier Bell, Bell introduced the firm to the ProntoForms team, who offered a mobile form solution that works on smartphones and tablets. The ProntoForms application and platform allows for the collection of various types of data (text, signatures, photos, bar/QR codes, etc.) on mobile devices, and immediate data submission to a variety of preferred data destinations, including back office systems, popular cloud services and more.

“Halfway through the ProntoForms demo, we were convinced that this was the answer for us.”

Initially, the Gateway team tested ProntoForms by introducing a mobile job hazard assessment form. The efficiencies seen in the initial form pilot got even bigger as people started using a mobile form version of the work order service ticket.

### The Benefits

Overall, Gateway is seeing enormous value in the ProntoForms solution.

“Expectations have gone up since we instituted ProntoForms. It used to take us 21 to 30 days to invoice a customer. By deploying ProntoForms, we now expect to get down to 7 days.”

Moreover, Gateway has taken advantage of many of the industry-leading ProntoForms features, including the ability to communicate with in-house systems. Now, Gateway can dispatch a pre-populated mobile form to field technician devices, ensuring proper information is available on the job site at all times, and then import information from completed forms.

*“We've seen a dramatic reduction in administrative data entry time. It used to take two-and-a-half employees two full days a week each to enter all of the data from the paper forms. Now it takes one person two minutes.”*

As for the future, Gateway is exploring how ProntoForms could be used in the sales process. They're also exploring the Office 365 data connectivity possibilities offered by ProntoForms.

“ProntoForms has helped us streamline our business processes and remain the best at what we do.”