PRONTOFORMS®

Improve Compliance and Jobsite Safety with Mobile Devices and the Cloud

Hosted by:

Mark Scott, VP Marketing, ProntoForms

Jody A. Smith, AAA Carolinas

Mark:

Hello Jody, and welcome!

Jody:

Thank you.

Mark:

Jody, thank you very much for participating. As I have mentioned, a marketing guy like me, I can talk about all this great stuff but really hearing about how you've used our solution and the kind of challenges that you've experienced in the past that really helps bring the story to life. So can you give us a little background about your company, AAA, and your role?

JODY: Absolutely, my name is Jody Smith, and I work with AAA in Carolina. Many people know us for our emergency road service section of our business, but we also do travel and repair work and insurance, but the road service is what we are known for. We are the group that comes out and tows your vehicle in a time of need, delivers tires, delivers gas, and we have a mobile battery service as well.

Mark:

Can you talk a little bit about before ProntoForms and some of the challenges or issues that you and your teams were facing that lead you to search for a better way?

Jody:

I think the challenge that we were facing was probably the same challenge that many people see. It was accessibility, consistency, availability, everything that goes into the technicians or employees in the field trying to fumble around with paperwork and turning it in. It was a very clunky, archaic method and I continued to laugh when we had this discussion, I remember back in the 90's when we were talking about a 'paperless work environment' and at some point, we had a tipping point. I can't pinpoint it but I remember having to go through boxes and boxes of paper looking for one sheet.

Mark:

We have the same reaction. I mentioned earlier sometimes I have to re-look at the date being in 2017 and there is the promise of a 'paper-free' work zone has been there forever, but now that the technologies are fully available, I'm unsure why people are still slowly adopting it. I think there is a little anxiety about making the change. We are obviously very familiar with your account, you are a great customer of ours, just some of the things that you do are the safety checks, the pre-service inspection, waivers, why don't we talk about some of those in the context of field employees and why that information is meaningful to the company above and beyond making it easier for them to work out in the field.

Jody:

We have primarily three areas that we replaced the paper forms with mobile forms, one of which was a pre-service inspection that annotates any pre-existing damage or flaws to the member's vehicle prior to AAA servicing it. That covers the obvious things, we run into situations where we are servicing a vehicle and there are things that come up that the member didn't know about or things the technician could have done so we want to make sure everything is clearly documented so we can show it back to the member in the event that we need to. The old way of doing it was having an outline of the vehicle on a piece of paper and the technician would walk around the vehicle and circle areas on the outline. This was time consuming, and an irritating experience to have someone examine their vehicle and point out all the flaws. It wasn't a great experience for the technician or the member. We were able to transform that process into the automated mobile form and not only were we able to type any notes that we needed, but we could walk up to two corners of the vehicle and take pictures, hit submit and we are done. It is a much better experience for both the technician and the member.

The other key component was our pre-trip inspection. We are mandated to conduct this pre-trip inspection each and every time one of our service vehicles goes out on the road. Like many other transportation companies, we have taken that mandatory safety inspection and morphed that into more of an operational type inspection as well where we are

making sure they have the tools and equipment required to do the job. We can also do an overview of the vehicle so if there is anything that needs to be brought to our attention we can do that. That was historically done with check boxes on paper. WE would go through and trust that the technician was putting accurate information on there and they would check the boxes, sign it, and put it into a box for a mechanic or management staff to pull out all at once and sort through. Now we've taken away the paper form and put it into ProntoForms as a mobile form where the technicians have a little, cleaner process where they go through and select 'yes' or 'no', the screens move, our transition based on the selections that are made and then once they hit submit it goes to the appropriate place. If there is a fault in the vehicle, it would be noted and automatically alert the mechanic and generate a notification so the technician cannot take that vehicle out.

Mark:

These are particularly great examples of the old way versus the new way, and that instantaneous access to information. I can see from an audit perspective, if it's night time and your tow truck driver is out there and doing his best to see if there are any faults in the vehicle, compared to if they document it with photos, it's "night and day".

From the change-management perspective, what did the roll out look like for you? How did your senior management, your peers, and your drivers out in the field react to this deployment?

Jody:

Starting with the senior management it was the definition of the ROI that got to them, like any management. We did this in a test environment where we were able to prove that the upfront costs and ongoing costs were almost a wash in the first couple of months. We were saving so much time on the side of the road as well as improving our members' experience and our employees' and technicians' experience. Understanding that anybody in the transportation industry where you have employees out on the side of the interstate in the middle of the night, a minute can be worth a lifetime. From the front-line level, a lot of that was handled through one-

one-one interactions. We made a very pointed decision that we were going to bring everybody in individually and walk them through the process and take the time to roll it out slowly and methodically. We were able to get a lot of the technicians involved in some of the testing as well and they are ultimately the ones who came up with the changes and recommendations that we later adopted.

Mark:

Great. Congrats to you on being a trailblazer in this space. I think the way you described that transition into a new way of doing things is very similar to the successful deployments that we've seen with other customers, big or small. We have seen them get all levels of people involved and start with proof of concept including ROI and grow from there.

One of the features and capabilities in our discussion was taking advantage of the geostamps and time stamp and how that's crucial for you and your teams to be able to really report with a level of accuracy that maybe you couldn't do before. Can you talk a little about that?

Jody:

Absolutely. One of the forms I didn't mention before that we changed from a paper form to a mobile form was the list of waivers. This sounds a little more cumbersome than it actually is. There are three waivers that describe precarious situations in which the member wants us to leave their vehicles. It still amazes me that we go out to service someone's vehicle and they throw us the keys and say tow it from point A to point B and they don't want to know anything else about it. We want to be a little more prepared than that so we have a list of waivers that identify a couple of scenarios in which we may be dropping the vehicle. One of these is to a closed lot, another is to an unsecured lot. Before we take ownership of the vehicle, we want to let the owner know that we are towing it at 2:30 a.m. and there is a very good chance no one is going to be wherever you want us to tow it to, so that member needs to be aware of this. Then, on the form, we are able to document this information and send the same waiver to the member. Instead of having the driver write down the date and everything, we take out this extra step because the form has

been saved with the time stamp, date stamp, and the latitude and longitude of where that transaction took place. When the driver arrives at the tow destination, he can update that form or update the waiver with pictures of how the vehicle is dropped off. He can show where he put the keys, update all the data and we have the time stamp and date stamp, etc.

Mark:

Another example of leveraging the power of mobile devices with ProntoForms and integrating those capabilities directly into your business process. You've really taken all of these capabilities and run with them. Whenever there is a unique capability like audio memos or photos with sketching on top, or any new technology that empowers organizations and business people or safety professionals to leverage those capabilities to do their job better, that's what we love to do. You said it as well, that extra information is night and day in terms of reporting. If there is any discrepancy, there is an audit trail of accountability that is as rich as you can conceivably be.

Do you have any last bits of feedback or any other discussion topic that you'd want to bring up?

Jody:

WE were doing our business the way we had for the longest time and we are really glad that we finally took the leap and transitioned to a platform that net makes sense. So, thank you for the opportunity.

Mark:

Thank you, Jody, for sharing with us.

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