

Nashville Machine Captures More Revenue and Better Quality Data using GoFormz for their Light Commercial HVAC Service Forms.



“Making our service tickets look exactly like our legacy paper tickets was very important to Nashville Machine.”

AT-A-GLANCE

INDUSTRY

Construction

CUSTOMER SINCE

2014

FORMS

HVAC service ticket forms, weekly timesheets, motor vehicle accidents forms, personal injury on the job forms

WHY GOFORMZ?

- Deep integration with Box allows for more efficient routing and improved accountability
- Comprehensive data capture improves division's bottom line
- Exact replication of legacy paper forms pleases company, manipulating data pleases division
- Ability to email completed forms to customers is a significant customer service improvement

BENEFITS

- Ability to create electronic forms that look exactly like the original paper forms
- Improves revenue by capturing previously untracked/undocumented services
- Enhanced accuracy and improved levels of detail

THE FULL STORY

Mike Rausch, HVAC service field supervisor for Nashville Machine, had an unusual situation: He wanted to modernize his division's forms, but while maintaining the same formats that they have been using at the company for decades.

Mike explains, "Nashville Machine was established in 1887 by two families. Both families have a very specific way they run their business, and, in my case, how they want the service ticket to look. GoFormz enabled me to create an exact replica of the paper ticket digitally."

About Nashville Machine

Nashville Machine is a large construction company with multiple divisions. Mike supervises a team of 16 technicians for the company's Commercial and Industrial HVAC services.

"Our team is scattered across Tennessee," explains Mike. "Some of my techs come to the shop or proceed directly to the jobsite. Essentially, our work tickets are dispatched daily by email."

Using GoFormz: Two surprise reveals

Mike used GoFormz to digitize his service tickets. The first form he tackled was their commercial service ticket, a critical form that his team uses multiple times a day. The new mobile form, replicated to match the traditional look and feel the company prefers, was so successful that Mike has digitized most of his division's go-to forms including: HVAC service ticket, weekly timesheets, business templates, motor vehicle accidents forms, and personal injury on the job forms. One of his favorite GoFormz features is the ability to add sketches and pictures to the forms.

The first thing Mike noticed when transitioning to GoFormz was that his technicians' accuracy greatly improved. "The technicians are inputting a lot more detail. And though they aren't all tech savvy, our GoFormz tickets and forms come in always looking great, professional and full of data. It's been our biggest surprise: We're receiving much better quality data."

Another benefit Mike noticed after using GoFormz was capturing lost revenue.

"We've picked up a lot of opportunities by shifting to GoFormz," says Mike. "In the past, technicians might not have written down all of the service charges and requests onto the paper ticket. Now, we have been able to create mandatory pull downs that step the technicians through the form and captures fees and opportunities that might have been missed before."

revenue. Now we can charge for every bit of work that is completed on each service call."

Mike and team fully utilize and benefit the power of the GoFormz and Box integration. When they complete a service ticket via GoFormz, the ticket is automatically placed in the ticket archives and payroll folder for the technicians. The archived tickets allow the technicians to search for previous work performed by customer, equipment, site location or job number. Tickets placed in the weekly payroll folder can be checked against the weekly time sheet and then sent for approval and on to payroll.

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The dispatcher utilizes the Goformz admin console to view tickets, both complete and still in progress. This is a great source for real-time information. This also provides a means to double check and edit ticket content before it is submitted to a customer.

Mike can now also see exactly what the tech entered. "GoFormz delivers more than what was expected and provides us with new levels of insight and accountability."



Another benefit: The seamless, multiplatform support

The fact that GoFormz can be used on any platform and device is a big benefit for Mike. "Not having to purchase specific hardware is a huge benefit," he adds. "I have guys on iPads, Androids, and one on a Surface tablet. GoFormz works beautifully on all of them."

Another bonus: "Our customers prefer to have their service tickets emailed, which we can now do seamlessly," says Mike. "GoFormz is one of the best systems our customers—and our technicians—have ever seen."

As a GoFormz user for more than a year, Mike feels that the quality of data received and the revenue captured has been well worth the time spent to create the forms.

"I am very happy with GoFormz and the GoFormz customer service support," says Mike. "GoFormz far exceeds my expectations."

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Mike adds, "These are all valid charges that should have been on the service tickets, but because technicians were scanning or moving fast to fill out the paper forms, we weren't capturing that