EBOOK

Transform asset management with mobile forms

PRONTOFORMS®
Mobility helps you keep assets in pristine condition, perform preventative maintenance, and drive predictable growth.

Top-tier mobile forms solutions offer much more than just digital versions of paper-based asset management and inspection forms.

Major enterprises like **AAA**, **PG&E**, and **Halliburton** are leveraging the ProntoForms solution to enable automated workflows for their field service teams - and drive a lucrative ROI.
In the old days, when people were sent into the field to inspect assets they would be handed a work order in the office – on paper. After completing the task in the field, they had to return to the office with their filled out work order form, along with timesheets, safety inspections, request for repairs forms etc. Alternatively they would have to scan and fax their documents from the road. Luckily, things are changing.

This eBook outlines how automated mobile workflows have completely transformed how asset management is handled in three industries – Field Service, Facility Management, and Energy.
TIPS FOR FIELD SERVICE TEAMS

Use mobility to work smarter and faster in the field

Field service encompasses a variety of industries and business functions, but mobile solutions can help any business that needs to keep track of a diverse set of high-value assets – from a fleet of vehicles to a field of wind turbines.

Whether you work on an oil rig or in the city, here are a few ways your teams can leverage mobility to enhance your asset management programs:

• **Efficiently collect accurate asset data.** A user-friendly interface, designed specifically for field users, streamlines the data collection process and prevents entry errors – ensuring the captured data is accurate.

• **Capture rich data directly in the form.** Capture photos of assets and annotate on top to highlight issues that need attention. Capture audio recordings of generators, compressors, and motors to gauge their condition. Embed all rich media directly into mobile inspection forms.

• **Complete asset inspection forms offline.** Mobile forms can be filled out even without network connectivity, and can be auto-sent once connectivity is restored.

• **Use dispatching and cloud-connected data sources** to provide field workers with the most up-to-date information in form dropdown menus (such as asset or parts lists, price lists, maintenance history, and CRM data).

• **Leverage analytics** to monitor asset use and support safety and longevity.

“We were doing about 300 inspections per month. Now we’re doing about 1,300 inspections per month.”

JASON BLOCH
INSPECTION SERVICES MANAGER

Tanknology
TIPS FOR FIELD FACILITY MANAGERS

Enhance your asset management with mobility and IoT

Facilities management teams are tasked with tracking and managing a wide array of assets, from janitorial equipment, to emergency supplies, and large HVAC systems.

There are many ways FM teams can use mobile tech to transform asset management - and ensure they’re getting the most out of their tools and materials:

- **Perform accurate and media-rich asset reviews** of vital equipment and systems. Effortlessly fill in crucial information with time-saving data capture capabilities. Ensure regular inspections with calendar integration. Capture photos of, for example, pressure gauges and seamlessly integrate them into mobile inspection forms.

- **Use asset and inventory forms** to ensure entry ways, bathroom stalls, signage, and elevators adhere to prescribed SLAs. Capture photos of assets and annotate on top to highlight existing issues in need of repairs or upgrades.

- **Leverage Internet of Things (IoT)** by installing networked sensors on high-value assets. These sensors can automatically trigger service requests or notify a supervisor when the equipment needs repair or maintenance.

- **Instantly submit forms to your back-office system** to provide an auditable, and always up-to-date, record of completed asset inspections.

- **Use analytics** to track all aspects of asset management, including the efficiency of assets in the field by region, facility, and/or team; frequency of maintenance performed for each asset; and scheduling of preventative maintenance to ensure assets perform safely and efficiently.

“We have seen a 75% reduction in customers calling us for overdue service or to re-do a cleaning job. When you calculate the value of their saved labor, travel time, and cleaning supplies, the solution pays for itself multiple times over.”
Mobility helps the energy industry maximize asset utilization

Energy companies manage a large number of assets that have to meet environmental, health and safety (EHS) compliance regulations. Those requirements have to be balanced with production quotas, and mobile solutions are enabling energy professionals to strike the right balance:

- **Automate all your inspection workflows**, including asset inspections and audits, and vehicle, tank, and lock out/tag out
- **Ensure emergency systems** (such as fire equipment) and critical assets (such as pipelines, rig equipment, and gas meters) are inspected properly and regularly
- **Provide field teams with “help” resources in forms**, such as links to instructional videos or new government regulations
- **Leverage analytics to track and monitor asset wear and tear**, and perform preventative maintenance to minimize emergencies such as pipeline ruptures and dangerous spills
- **Integrate with your back-office system** to make all reports available in real time for auditors. You can name and sort reports by region, date submitted, the employee who submitted it, etc. You can even sort by frequency of asset use, maintenance, or asset-based incident or breakdown

*Pesado Energy Services saved $250,000 in 2015 on administrative costs alone with 21 workers deployed on the solution*
Use Analytics tools to drive continuous improvement

You can’t manage what you don’t track. With analytics, you can drill down into data collected by your asset management teams to uncover trends and the root cause of critical issues. Dashboards and reports help you monitor progress against your commitments, empowering you to reach your compliance targets.

Analytics can help you answer questions like:

- Is every team achieving their objectives or targets?
- Which team or employee is falling behind the rest?
- Has our quality of service improved or worsened over time?
- Is the number of unplanned events increasing or decreasing?
- What is our overall compliance score? Does it get better or worse every year?
- Which region or team has the lowest/highest compliance score?

“We’re hitting between 95 and 100 per cent compliance, on a monthly basis.”

PATRICIA RICHARDS
MANAGER OR BUSINESS DATA ANALYSIS
DIVERSIFIED MAINTENANCE INC.
VFC supercharges productivity

VFC safeguards facilities from lightning and transient voltage by designing and installing lightning protection, grounding, surge protection, and lightning warning systems. Founded in 1989, the Utah-based company has grown to become the nation’s leader in its industry, providing solutions for over 20,000 businesses globally.

VFC currently has more than 600 active projects across the country, with customers serviced by teams from the company’s regional offices. Before ProntoForms, the teams were relying on antiquated paper-based processes for their daily reports.

To overcome its challenges, this industry leader turned to ProntoForms, a mobile solution provider that allows field workers to collect vital work data on phones and tablets, and submit accurate and media-rich forms from anywhere in near real time. All told, VFC is reaping a total annual savings of $340,000 per year.

“ProntoForms has sped everything up to virtually real time. That’s had a huge impact on all of our operations,” says VFC’s Vice President Travis Vought. He explains: “ProntoForms is saving our field teams half an hour per day. That adds up quickly. That’s $25,000 a month.” ProntoForms has streamlined operations at the office as well, with increased efficiency in payroll and invoicing saving $40,000 a year.

$340K ANNUAL SAVINGS with 40 mobile users deployed
Transform your business processes today
Click here to request a live demo
prontoforms.com/demo