Transform inspections and audits with mobile forms
Mobility helps you prove compliance, exceed CSAT, and drive predictable growth.

The ProntoForms platform offers inspectors and auditors in the field much more than just digital versions of paper-based safety checklists 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 technicians were sent into the field to inspect or audit a piece of equipment 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, and other forms. 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 inspections & audits are managed in three industries – Field Service, Facility Management, and Energy.

Transforming inspections and audits across industries
TIPS FOR FIELD SERVICE TEAMS

Use mobility to improve your field service productivity

Field service encompasses a variety of industries and business functions, but mobile solutions can help any business that has teams working away from the head office. Whether you install flooring or repair oil pipelines, here are a few ways your teams can leverage mobility to enhance operations in the field and at the office:

- **Efficiently collect accurate inspection 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 job sites and equipment and annotate on top to highlight problem areas. Capture audio recordings of generators, compressors, and motors to gauge their condition. Embed all rich media directly into mobile inspection forms.

- **Complete inspection forms offline.** Mobile forms can be filled out 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 lists, parts lists, price lists, and CRM data).

- **Leverage analytics** to monitor regulatory compliance and ensure you’re on track to meet your SLA’s, driving continuous improvement.

“The mobile solution saves AAA Carolinas 3 min/call, 750 hrs/month, in roadside assistance while improving driver safety.”

JODY SMITH, FLEET OPERATIONS MANAGER
TIPS FOR FACILITY MANAGERS

Enhance your facility management services with mobility and IoT

Facility management teams are tasked with performing regular inspections and audits of everything from emergency systems to janitorial services. There are a number of ways FM teams can use mobile tech to transform these processes – and deliver a higher quality of service:

- **Perform accurate and media-rich inspections** of emergency systems. Quickly fill in information with time-saving data capture capabilities. Ensure regular inspections with calendar integration. Capture photos on site and integrate them into your forms.

- **Be compliant with the Americans with Disabilities Act.** Use mobile forms to ensure entry ways, bathrooms, signage and more adhere to the ADA. Capture photos and annotate on top to highlight non-compliant areas.

- **Leverage Internet of Things (IoT)** by letting strategically-placed sensors automatically trigger service requests when a piece of equipment needs repair or maintenance.

- **Instantly submit forms to your back-office system** to provide an auditable record of completed inspections.

- **Use analytics** to track all aspects of inspections and provided services, including the number of completed service reports submitted; quality of service and customer satisfaction scores; and compliance with your SLAs.

“Diversified Maintenance used ProntoForms Analytics to raise compliance target from 85% to 100%.”

PATRICIA RICHARDS
MANAGER OR BUSINESS DATA ANALYSIS
TIPS FOR ENERGY PROFESSIONALS

Mobility helps the energy industry achieve regulatory compliance

Energy companies are facing an increasing number of environmental, health and safety (EHS) compliance regulations, but need to balance meeting those requirements with production quotas. Mobile solutions are enabling Operations Directors and other energy professionals to strike that balance:

- **Automate all your inspection workflows**, including material safety data sheet, OSHA, vehicle, tank, and lock out/tag out

- **Ensure emergency systems**, (such as fire equipment) and critical assets (e.g. pipelines, rig equipment, and gas meters) are inspected properly on a regular basis

- **Provide field teams with “help” resources** in forms, such as links to instructional videos or new government regulations - very helpful for less experienced field technicians

- **Leverage analytics** to track and prevent all environmental and safety-related incidents that harm compliance

- **Integrate your mobile solution with back-office systems** to make all reports readily available for auditors. You can name and sort reports by region, date submitted, the employee who submitted it, etc. You can even sort safety and inspection reports by average compliance score

“By using ProntoForms for our field teams, we saved about $1.5M in atmospheric corrosion inspection costs.”

KHALED FUSTOK
SENIOR MANAGER GAS TECHNOLOGY STRATEGY & SOLUTIONS

PG&E®
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 inspection & audit 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 were doing about 300 inspections per month. Now we’re doing about 1,300 inspections per month.”

JASON BLOCH, INSPECTION SERVICES MANAGER, TANKNOLOGY
AAA Carolinas is one of the largest and fastest growing AAA clubs. Headquartered in Charlotte, the club has over 1,300 employees and offers a wide range of services, including emergency roadside assistance, travel and touring information, insurance counseling, and automotive repair. The club completes roughly 500 service calls every day, totaling about 15,000 monthly.

AAA’s drivers have to conduct vehicle inspections before heading out on their shifts - a process that used to be relegated to pen and paper. Drivers are now using ProntoForms to complete their pre-trip inspection forms on mobile phones and tablets. With the touch of a button, submitted forms are automatically uploaded to Box as PDF files.

The system also includes geo-stamps and signature capture that prove that AAA members were on site and that the member signed off on the provided services.

“We’ve seen a decrease in the amount of time that a driver spends on location with a member, resulting in faster response times and the ability to get to the next call quicker,” says Jody Smith, Manager of Fleet Operations.

750 HOURS saved every month in driver roadside assistance
Transform your business processes today
Click here to request a live demo

prontoforms.com/demo