



# BRANDT

## SUCCESS STORY

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**26**

Technicians Using  
FormsPro

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Number of Forms  
Being Used:

**50**

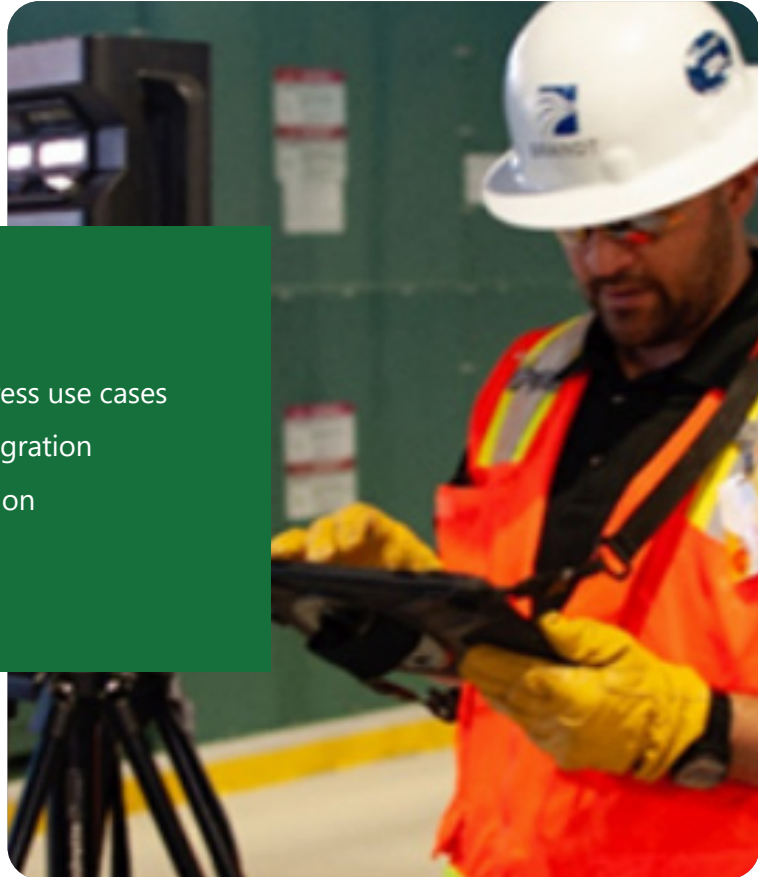
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**FormsPro** 

## Business Goals

- Flexible no-code forms solution to address use cases
- Open and enabling architecture for integration
- Ability for rapid deployment and adoption
- Improve efficiency and data accuracy



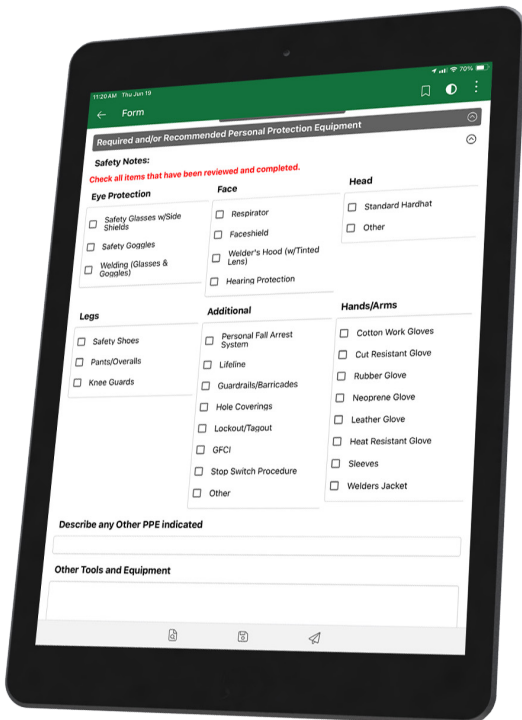
## THE CUSTOMER

With over 65 years of industry expertise, Brandt harnesses the combined power of more than 2,700 highly trained employees: industry leading craftsmen, licensed engineers, trained technicians, and technology experts.

Brandt uses cutting-edge technology to improve project outcomes, from building information modeling (BIM) to workflow management software. Their digital capabilities help them minimize redundancy and make the most of their work processes. Their increased productivity and efficient project completion mean better client service, shorter design/build timelines, and fewer budget surprises.

## THE CHALLENGE

Brandt was looking for a no-code mobile forms solution to enhance their operations, address specific use cases, solve workstream challenges in multiple divisions, and reduce or avoid technical debt.



## THE SOLUTION

After extensive evaluation with Brandt's IT and business groups, OmniByte's mobile forms solution, FormsPro, was chosen to initially address forms required in their field service division. The solution required a flexible and in-depth forms capability along with integration tools. Ability for rapid deployment, training and adoption were key measures for success.

### Field Service Division

Brandt's commercial service division required forms to address data logging, layout and start up tasks to better match the work techs performed. Consistent data capture information and an integration to the back-end Field Service Management (FSM) system were also required. A boiler layout sheet was originally created and implemented as part of the initial implementation of FormsPro, from which Brandt easily created other forms and reports for this division while integrating the solution to their FSM. The successful deployment of FormsPro in the Field Service Division along with Brandt's customer experience and support from OmniByte led to additional projects and expansion in the organization.

### Health, Safety & Environment Division

Brandt's Health Safety Environment (HSE) Safety Division had specific requirements and needs around their internal procedures for handling incidents with a complete closed-end process. When incidents were identified, a number of users would need access to the same form at various times in the process and needed to edit or approve it at different stages.

The data completed at these different stages was also important to capture prior to the completion of the incident report. Brandt needed to track corrective actions taken because of the incident, potentially leaving an incident open with additional forms (children) for an extended period.

### Use Case and Adoptions

- Service Extra Work Authorization (EWA) - Allows field technicians to enter information about additional issues found at a customer site during visits and start the pricing/approval process with the customer and their internal sales team. This process even fires a custom event that creates a record in their proposal tracking system.
- Refrigerant Tracking - PA-required form for tracking refrigerant used in customer equipment.
- Boiler Layout Sheet/Combustion Data Forms - Used by Boiler technicians
- Tool Request/Tool Return - Forms used to improve communication with Brandt's tools team.
- PTO Forms - Allows their employees to request PTO and routes the approval to their manager.
- Safety Forms - Allows their Safety and Field leadership to track safety observations and record any incidents that may occur in the field.
- COVID-19 Safety Form - Brandt was able to create a safety form and push to their field in under four (4) hours to track what our customers are doing at each of their locations when they visited.
- COVID-19 Daily Check in - Using FormsPro Lite, Brandt rolled out a daily check-in form to streamline their return to work program and allow employees to self-report with a simple questionnaire.

## THE RESULTS

Brandt has been an OmniByte client since November 2018. They currently have FormsPro deployed and integrated across their enterprise for over 2,500 users.

- **44% Increase in Extra Work Authorizations**
- **\$4.8 Million Increased Revenue**
- **43% Increase in the Number of Forms Submitted**
- **8 Hour Rapid Deployment of COVID-19 Safety Form to Technicians**



“Other solutions are not much more than a pdf form converter or an online pdf creator. The FormsPro product has a key differentiator: FormsPro allows us to easily transform the information entered into the forms into structured data that we can use.

We can use this data for reporting. We can use this data to create powerful workflows. We can use this data to fill in customer/municipality forms that must be in a specific format. And it all happens in a way that is efficient and easy to use for the field staff. UI is great. A lot of products have the great UI, but they can’t easily transform what’s entered into the form into useful data.”

**Kevin Underwood- Technology Program Manager**

“We looked for a solution that could easily connect with our other systems and leverage data we already had. We needed the flexibility to generate and publish forms to specific audiences and collect the responses in a single spot. FormsPro allows us to send a PDF output to customers (both internal and external) and store the data in a data warehouse where we can perform other business actions on it.

We have been able to quickly build the forms needed to run our business. The trickiest part is getting good, solid definitions of what is needed. It is important to understand what data is being collected, what you want to do with it, and how it should be displayed. FormsPro does a good job of putting the technology in the background so you can focus on the business problems at hand.”

**Robert Everett – VP of IT**

“The safety department uses FormsPro for accident and injury investigations, and various other forms that we use in the field. FormsPro was given to us as an easy to use application for creating forms to be used company-wide. The app has made creating forms for use in the field very easy.”

**Weldon Miller - Service Safety Manager**

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# FormsPro

FormsPro is the smart mobile forms application platform for your field service organization including field workers, all team members and your customers. FormsPro enhances productivity, eliminates paper and fillable PDFs which only deliver static data, increases job safety, customer experiences and regulatory compliance.

FormsPro runs standalone or easily integrates to your existing business applications. Use real-time data capture from field team members in dashboards and reports for key back office decision making and key performance indicators.

FormsPro is no-code solution allowing you to build intelligent forms with workflow and conditional logic for simple to complex processes within your field service delivery.

To learn more about FormsPro visit: [www.omnibyte.com](http://www.omnibyte.com)

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## OmniByte

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