

OmniByte 

GORDON RUSSELL

SUCCESS STORY

26

Technicians Using
FormsPro

Number of Forms
Being Used:

50



FormsPro 

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When a service technician is onsite, on the clock and up to their elbows in grease, paperwork is the last thing on their mind – no matter what industry they work in. The customer needs the job done now, and documentation is a lot less important than getting machines back online and productivity back on track. For Gordon Russell, a company serving heavy industry in Canada, FormsPro changed documentation from a challenge into a strength, and the results have been dramatic.

7 features that equal 1 fact

VACSEAL PUMPS
are built to serve better

THE GALIGHER CO.
CONSULTATION • DIE CASTING
PLANT DESIGN • SPECIALIZED MACHINERY

THE DAVID BROWN CORPORATION (DALEN) LIMITED
EXCLUSIVE DIE CASTING

7 TYPES

- 1 1/2"
- 1 3/4"
- 2 1/4"
- 3"



THE CUSTOMER

Gordon Russell got its start in British Columbia in the late 1920s. The eponymous founder and his two sons supplied technology to the Canadian mining and forestry industries and in the 1960s introduced Trackmobile Mobile Railcar Movers to its lineup. This was an important move for the company's growth, and eventually Gordon Russell added locations in Red Deer, Alberta and Prince George, British Columbia. The company also provides products and services to customers in Washington and Oregon in the United States.

Now the largest Trackmobile parts and service partner in the Pacific Northwest, Gordon Russell also services power transmissions, clutches, and brakes. The company's techs and sales team work closely with some of the most respected suppliers of industrial parts and products in the world. By building close relationships with its customers, it has solidified its place as an important part of the industries it serves.

THE CHALLENGE

"Sometimes it would be weeks after a service call before we got paperwork from the technician," says Conrad Cherrington, Operations Analyst at Gordon Russell, "and when we did get it, it was frequently dirty and fairly illegible. As a result, it took a long time for us to get all of the documentation sorted out so we could invoice the customer."

It was an imperfect system that held challenges for both technicians and customers. Techs found themselves scrawling notes on inhospitable job sites, and customers sometimes questioned the results, debating the facts of a job partially because the documentation was incomplete or unconvincing.

"We tried scanning software for a while, but it wasn't a good fit," Cherrington says. "It didn't really solve our paperwork issues."

Gordon Russell needed a change.

EXAMPLES OF FORMS

- Pre-Job Inspection
- Service Call Cover Sheet
- Service Evaluation
- Job Hazard Assessment
- Service Time Entry



I would definitely recommend FormsPro. I never expected a technology company to be as responsive as OmniByte, and Gordon Russell's leadership team approaches me regularly with new ideas about how we can put FormsPro to work.

-Gordon Russell

EXAMPLES OF CUSTOMER'S FAVORITE FEATURES

- Improved invoicing speed
- Integration with other systems
- Responsive technical support

THE SOLUTION

“We had a partner who recommended FormsPro, and we decided to check it out for ourselves,” Cherrington recalls. “The first time I saw the software I knew it was going to be a good fit.”

Cherrington worked with OmniByte’s technical consulting staff to create forms and integrate FormsPro with Gordon Russell’s other systems. Then he and his team rolled the new system out to techs and office support staff with a focused effort that included documentation from OmniByte, materials created by Gordon Russell and onsite training from Cherrington himself. By all accounts, it was the most uneventful software rollout in the company’s history.

“We were changing our CRM system at about the same time,” Cherrington smiles, “and to put it mildly, that was a much more difficult experience than adopting FormsPro.”

Today, service call documentation at Gordon Russell can now be completed right away and delivered to the customer within minutes. Plus, that information is immediately shared with the company’s other systems, including photos from the job site.

“A big part of what we do involves inspections,” says Cherrington. “Documentation on those is very important and being able to attach images has been incredibly beneficial. In the past you might tell a customer that an axle was cracked and needed to be repaired, and their reply would be ‘OK, I’ll check on that myself.’ Now, they see the photo and there is no more debate – that axle needs repair.”

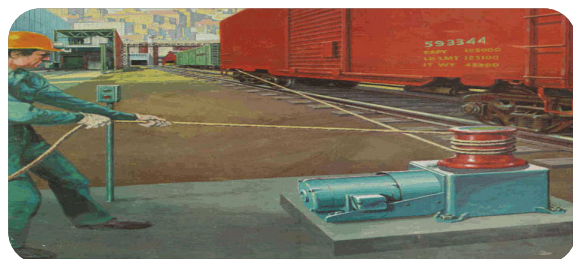
Overall, the new system has made a positive impact on cash flow at Gordon Russell. “FormsPro reduced the time between our techs making a service call and our office

sending an invoice by as much as two weeks,” Cherrington says. “It has dramatically improved our customer-facing presence and even reduced the number of questions we get from customers about their bills.”

A few of Gordon Russell’s most used forms include their service call cover sheet, a site contact sign-off, a service evaluation form and a job hazard assessment. Overall, the company uses FormsPro to facilitate around 50 forms to 26 users across western Canada and the Pacific Northwest. Gordon Russell has even started using FormsPro for time entry and payroll.

According to Cherrington, techs and staff at all three of the company’s branches appreciate how FormsPro has made jobs easier throughout the company, including his own. “FormsPro has helped our documentation tremendously and the support that OmniByte provides is really special. So many software companies today make changes or release updates and expect users to act as beta testers. Rather than working through the problems themselves, they’ll contact me with questions and I end up really making an impact on the end result.”

Things are different with FormsPro, he says. “The team at OmniByte works hard to make real improvements without relying on me to test them – and when something does come up, their support is never an afterthought. I’ve never seen support as professional as the support I get on FormsPro, and that’s one of the biggest reasons I would recommend them.”



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

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www.Omnibyte.com

1854 NDSU Research Cir. N | Fargo, ND58102

sales@omnibyte.com