The 5 Phases of Digital Transformation

The modern workplace's guide to digital optimization

Transforming the Modern Workplace

Digital technology plays a central role in the modern workplace — helping to promote efficiencies, scale operations, and provide large time and budget savings. Yet, so many businesses are still relying upon the most analog and archaic tool within their frontlines: paper forms.

Customer information and work data collected via paper forms introduce unnecessary data-loss risks. They also create a plethora of obstacles and errors, especially when businesses' digital systems rely on paper forms to provide volumes of information from 'the field.' In order for companies to keep pace with the speed of modern solutions they must digitally transform their business forms and documents, processes and workflows. It is imperative that they embrace the fundamental notion that an effective digital transformation of the modern workplace starts with replacing paper forms with digital versions and continues with seamless integrations from forms to back office systems.

Ready to embark on a digital transformation of your own? Familiarize yourself with these five phases of digital transformation to jumpstart and guide your digital evolution.

"**82% of IT decision makers cite 'going paperless' as a top digital transformation initiative** within their organization."

MuleSoft's '*The Problem With Digital Transformation*'
https://www.mulesoft.com/lp/whitepaper/api/whats-going-wrong-with-digital-transformation, 2016

Glossary of Digital Terms

Mobile Forms - Digital versions of your business documents that look exactly your existing forms, and can be filled out on phones, tablets and computers.

Conditional Logic - Based on what is entered into one field, your form can instantly populate multiple fields with corresponding values, or execute basic logic operations
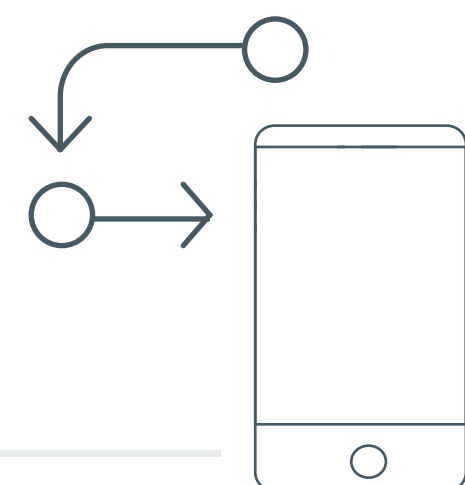
Dynamic Field Properties - Change the way a field looks/behaves in response to entered data

Integrations - Inclusion of GoFormz into your existing business processes and systems

Data Sources - Simplified database table (referenced by form fields to simplify data capture and increase accuracy)

List View - A presentation of a mobile form in an 'app-like' layout for enhanced navigation on smaller screens

Automated Workflows (Triggered Events) - An operation or task that occurs (instantly) as the result of another action. *Example: An Auto-Email workflow can be triggered by the completion of a specific form*

Digitize, replace and enhance your paper forms

The first step in your digital transformation begins with 'going paperless' — replacing your paper forms with powerful, digital versions that can be filled out on mobile devices and online. Forms are figuratively and literally on the frontlines of a business, where critical customer and operational data is captured. Collecting this data digitally means immediate efficiency gains and a vastly reduced range of human error.

Digital forms are the critical first step in embracing end-to-end digital systems. Mobile forms (digital forms that can be used on mobile devices like phones and tablets) provide immediate benefits, such as:

- Removing the need to physically hand in documents (reducing delays)
- Consistently capturing accurate totals with automatic calculations
- Improving record-keeping and document retrieval
- Eliminating the need to rekey form information into separate systems

...and much, much more.

Digitize, replace & enhance your paper forms

Many businesses have traditional paper forms that their teams have been using for years (or even decades). Because of this, rather than building a mobile app from scratch (with a whole new layout and interface) *it is best to implement a solution that will preserve the look and feel of your traditional paper forms.*

Collecting data within a familiar interface accelerates user adoption, because little to no training is required (they already know the "what goes where" of their form, all they have to do is use a tablet or phone instead of pen and paper). Simplified user adoption helps avoid the introduction of any unforeseen issues, often caused by the complete overhaul of existing workflows and processes.

Instantly reduce administrative processing times, and gain efficiencies and time savings

When a user completes a mobile form during a customer engagement or at a jobsite, it is instantly available for the administrative team in the office to review. Whereas paper forms have to be physically handed in, faxed, or shipped in to the office.

Mobile forms are immediately submitted for review, reducing administrative processing times by several orders of magnitude, leading to expedited invoicing, billing and other operational cycles. Further simplifying this process is the ability to capture data offline via mobile forms, which are can then be instantly uploaded to the cloud once a signal or WiFi is available. Resulting improvements in review and processing times allow for more efficient operations from field-to-office, in tandem with high levels of cost savings.
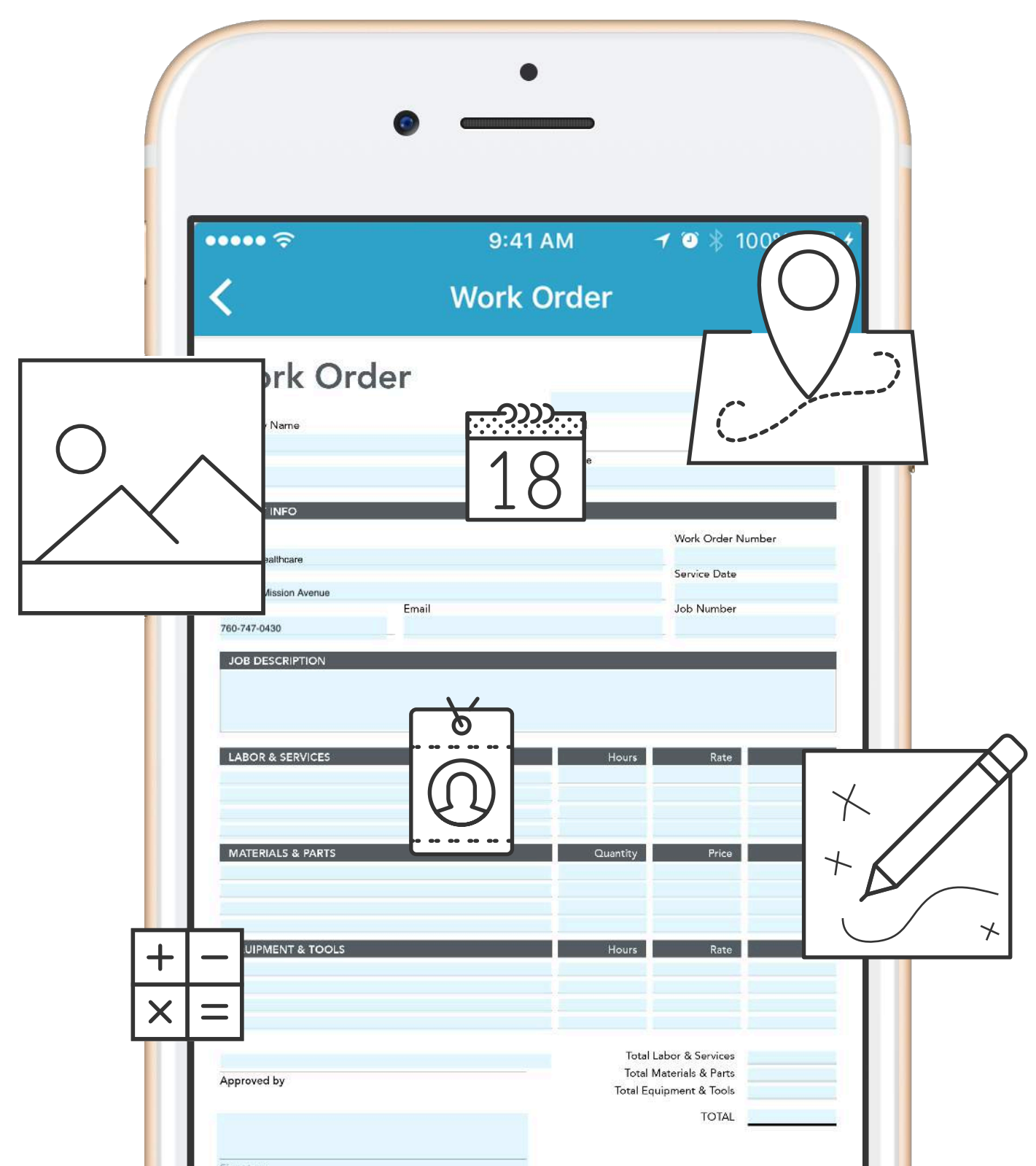
Leverage digital resources — enhance forms with new features, visual information and new data types

Enhance your forms with data types and features that only digital devices offer. You can easily augment your digital forms with new fields that capture location and visual information (like images and sketches).

For example, with digital forms on mobile devices, you can easily add GPS information, maps, and images directly from your tablet or phone. These visual fields bring context and referenceable aids to collected data, increasing jobsite transparency and further enriching insights.

Features like barcode scanning also leverage your device's native tools, to rapidly capture and input product information — further reducing errors and streamlining data entry.

"I have ten to twelve image fields where **users can submit pictures and add comments**... customers love seeing pictures of the work that we do."
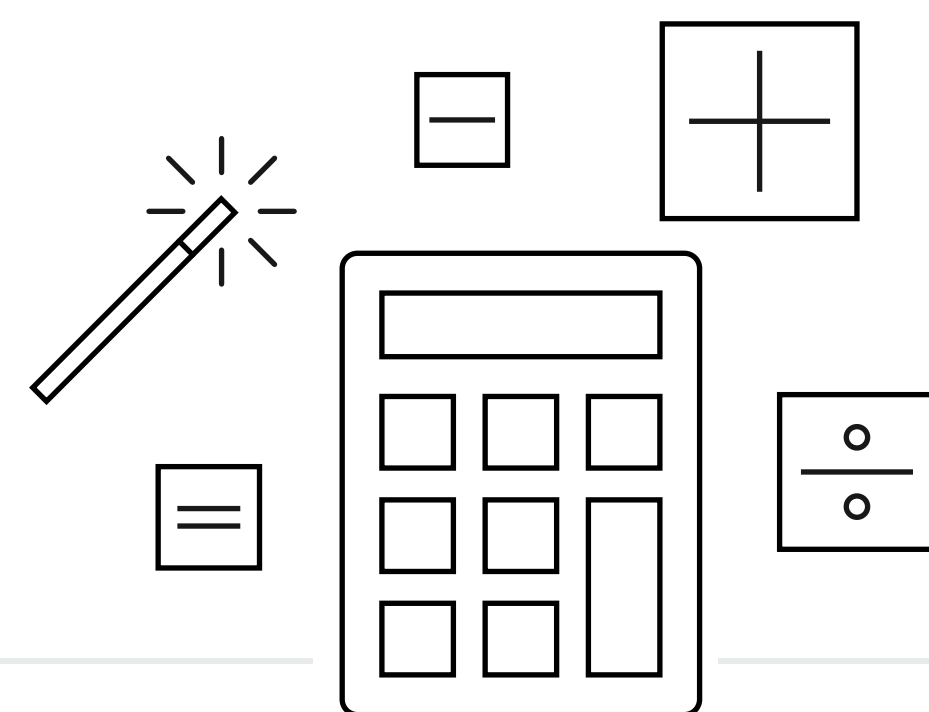
Tyler Spears, Millennium Nursery

Automate calculations & embed business logic

Digital forms provide the advantage of always capturing accurate data, faster and more accurately than ever before. Instead of relying on the user to complete calculations, configure your forms to automatically perform them — ensuring precise totals are consistently captured.

Once digitized and optimized with automations and logic, you can anticipate a plethora of immediate benefits from your documents. For example, you can expect a decrease in bad data due to human error, thanks to *Conditional Logic*, dropdown menus and *Dynamic Field Properties*.

Expedite data capture & processing with key digital features

Digital documents not only provide better data, but faster data. With easy-to-implement digital features, like dropdown menus (pre-filled with accurate data options), *Dynamic Field Properties* and more, data entry can be seamlessly expedited without compromising data accuracy. For example, selecting an item from a dropdown can pre-fill corresponding fields with previously captured information — ensuring accuracy, while accelerating data entry. Additionally, automations and triggered events help to reduce delays and improve responsiveness, allowing for data and documents to be routed to key-players and systems in real-time.

Summary of Phase One Benefits

- Immediate form submission & instantaneous data

- Consistent, accurate data (automated calculations)

- Faster review and processing (cost savings and streamlined operations)

- No need to rekey information (faster data transfer to systems)

- Cloud based storage and search (immediate retrieval)

- New data types (images, maps, etc)

- No more incomplete forms (logic enforces which fields must be filled out)
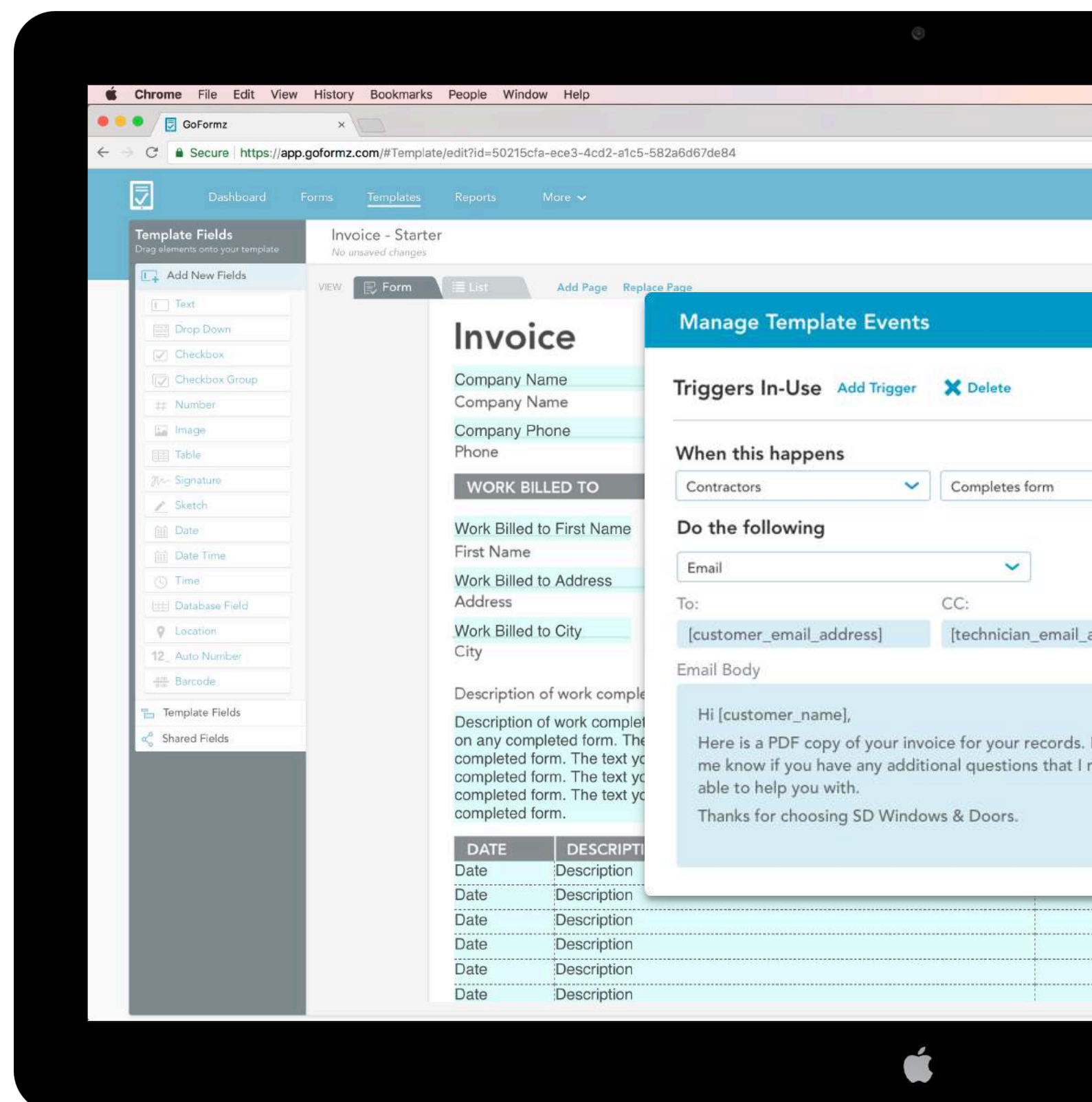
- Offline data entry

| 1 **Digitize** | 2 **Optimize** | 3 **Connect** | 4 **Roll Out** | 5 **Analyze** |

Digitize and optimize your daily workflows

The next step in your digital journey is to configure and optimize the workflows that correspond to your digital forms. Implementing *Automated Workflows* (in which inputs and events trigger actions like emailing, automatically storing a form, or notifying a teammate that their input is needed) ensures that business rules are followed properly, while also expediting and refining the completion of daily tasks. For example, if a form user were instructed to email copies of their completed forms to their supervisor, *Automated Workflows* can ensure this task is always instantly and automatically completed.

Automated Workflows also provide an opportunity to improve responsiveness between teammates and customers. Because completed forms can be instantly shared, *Automated Workflows* help to eliminate delays (no more waiting on paperwork to be hand-delivered) and avoid obstacles for efficiency.

Improved responsiveness not only results in elevated professionalism, but also further encourages productivity, helping your team complete projects and tasks in a more timely manner.
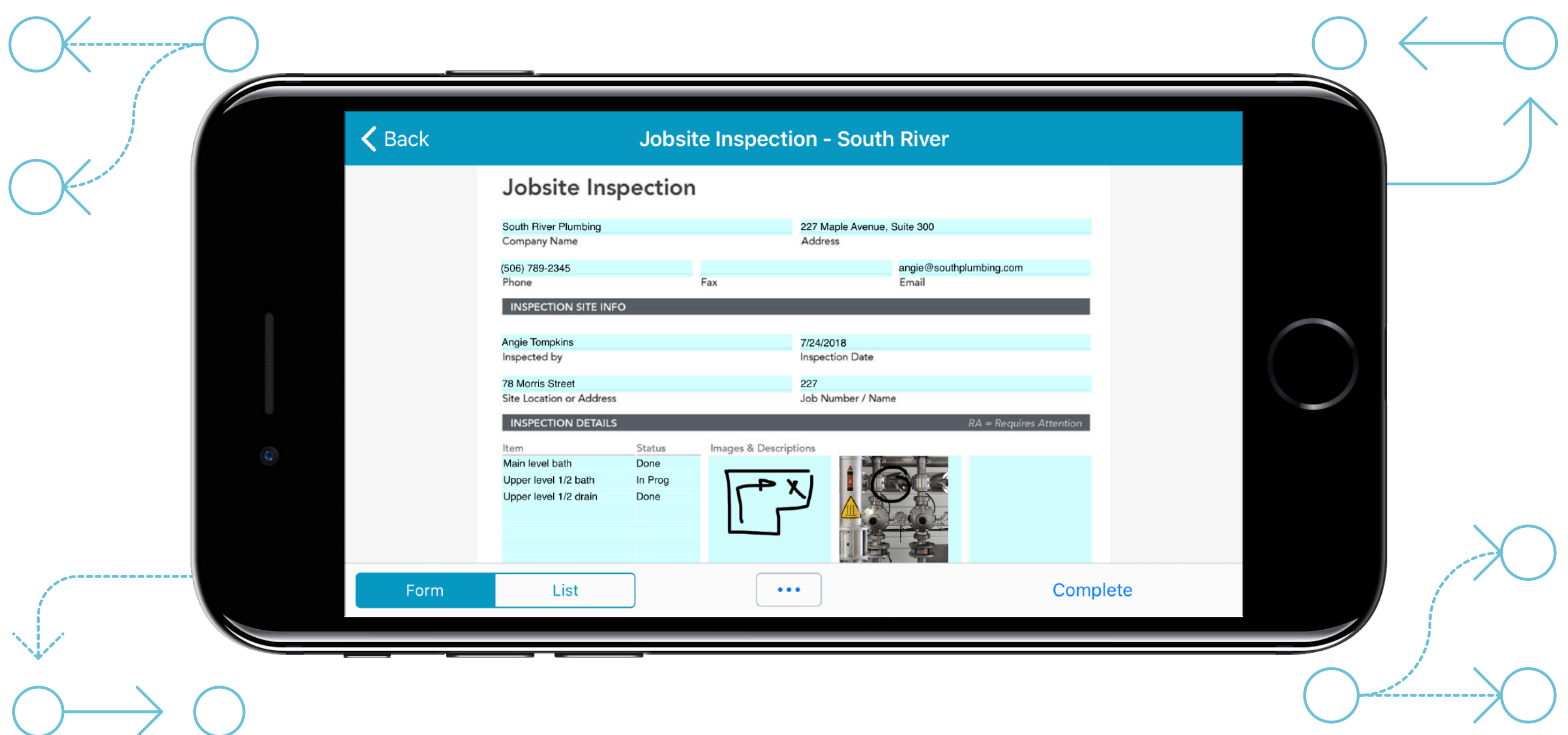

goformz

Identify and implement new rules, calculations and further automation

As you begin using your digital forms, you will encounter areas of your workflow and form-level automation that can be refined. Enhancing your forms with new calculations and logic ultimately streamlines workflows and offers new opportunities to improve your overall operations.
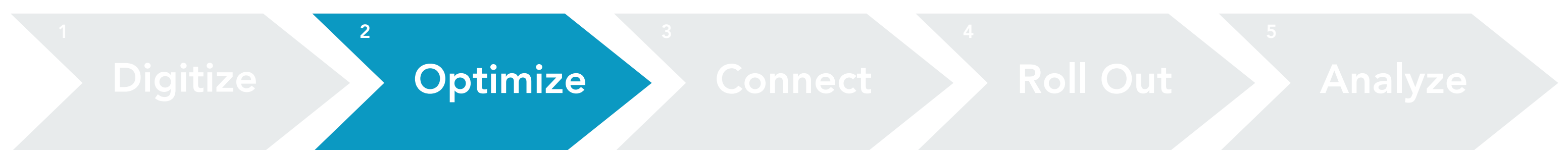
Similarly, adding *Conditional Logic* via *Dynamic Field Properties* helps guide user input by allowing for the modification of a field's look and behavior, in response to specific data input. For example, a *Dynamic Field Property* could be applied to a mobile form's *Signature* field, instructing that the field must be completed before a form can be submitted.

With the ability to manipulate form field behavior, form creators can better guide users and avoid opportunities for error or negligence. For example, by embedding "IF-THEN" like logic within your form, business workflow steps can be consistently enforced.

Summary of Phase Two Benefits

- Seamless communication & routing

- Improved customer facing professionalism

- Increased responsiveness & productivity

- Embedded form logic reduces errors and delays

1 Digitize 2 Optimize 3 Connect 4 Roll Out 5 Analyze

"I was shocked to see that **after implementing GoFormz, we had 2x the amount of data coming in because of the conditional logic** we included in the forms..."

Jenifer Colbenson, Team Murph

Connect your mobile forms with other business systems and applications

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A common and problematic issue of using paper forms is that they result in isolated data. Data locked within paper forms and filing cabinets serves little to no purpose. Other business applications are unable to access paper-based data, requiring businesses to waste manpower on manually finding forms and then scanning and rekeying data into their other systems. This process not only burns valuable business hours and budget, but also introduces yet another opportunity for human error.

Conversely, data captured via mobile forms can be seamlessly routed in real-time to other critical business applications and even to other digital documents. Once you have structured your mobile forms and accompanying workflows, you should identify which other platforms would be enriched by and benefit from the data collected in your mobile forms. Data captured within mobile forms can be instantly routed to CRM's (e.g. Salesforce), HR applications and more, with no need for re-keying, scanning, faxing or filing.

Streamline your forms with dropdown menus of existing data

Implementing fields that pull from previously captured *Data Sources*, provides an opportunity to further ensure your operation's balance of efficiency and accuracy. For example, mobile forms can host dropdowns filled with data pulled from *Data Sources* (collections of frequently used data). These pre-filled dropdowns present users with a pre-defined, specific range of options to choose from when filling in a field. By limiting the options a user can select, mobile form creators can better manage what data is entered, thus improving accuracy.

Summary of Phase Three Benefits

- Connecting mobile forms to business applications provides constant current of captured and previously-captured data

- Pre-defined data ranges and dropdowns eliminate opportunities for error

- Pre-filled dispatched forms expedite form completion

- Data passed from mobile forms to connected systems provides real-time insights

- Integrated business systems extend back-office data to frontlines, enriching every aspect of an operation
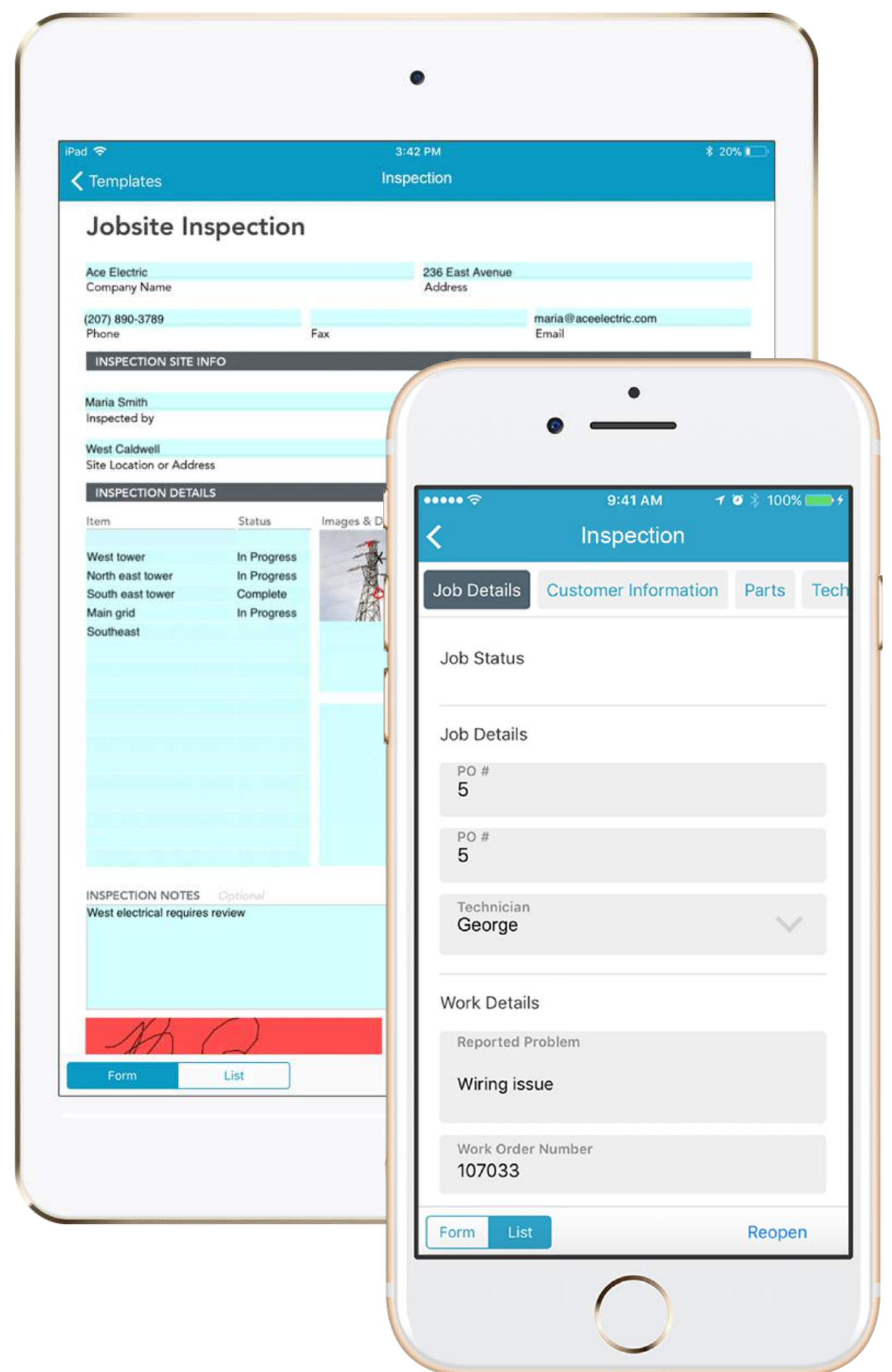
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Mass adoption and application

With your mobile forms completed, workflows configured and integrations ready, it is time to roll out your digital solution to a broader selection of users. Because your new, mobile forms look exactly like your original paper forms, user onboarding can be completed more quickly and simply (thanks to the familiar look and feel of the mobile forms).

When searching for a mobile forms solution, and planning your onboarding, keep in mind the devices users may be using. Some paperless solutions force users to use their mobile forms on rigid apps that restrict formatting, resulting in forms and documents that are hard to view and use on smaller screens and devices. For a more versatile, sustainable solution, ensure your mobile forms platform provides a viewing mode optimized for both smaller screens, and user-familiarity.

For example, users with smaller devices (like phones) can use their mobile forms in an app like view/mode optimized for rapid data entry on smaller screens. Users on larger screen tablets can use their mobile forms in the more traditional form layout view - offering a familiar interface and better layout for data entry.

Another device-specific element to keep in mind, is data usage and offline capabilities. Often times, mobile forms are used predominantly on remote job sites, where a signal may not be consistently available. For this reason, some teams elect to use devices that do not require a data carrier plan, saving their operation an additional expense.

Reap the benefits of digital, centralized record-keeping

With the mass adoption of mobile forms throughout your operation, your business' record-keeping can also be significantly optimized. Mobile forms reduce the physical resources necessary to run a business, significantly benefitting administrative budgeting. For example, digitizing your documents removes the need for paper forms, physical storage, paper-related tools (like staplers) and more.

Storing completed forms and data in the Cloud also provides significant time savings. Because forms are digital, they can be easily searched and accessed instantly (no more digging through filing cabinets).
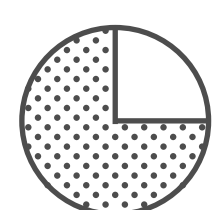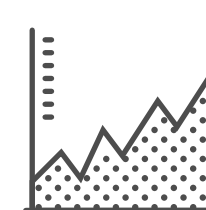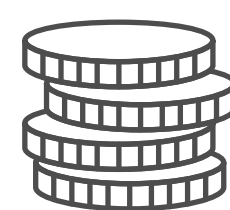
"GoFormz takes so much work off of our administrators, and eliminating the paper forms saves us thousands of dollars. GoFormz easily **saves me 50-75 hours per month that would otherwise be spent just on office personnel tasks**"

Dale Henderson, SiteMix

Digital form collections lead to major gains

The adoption of mobile forms encourages user collaboration and more compelling data... without fear of overwrites or redundancies. Completed forms can be instantly accessed and reviewed by supervisors or back-office administrators, empowering teammates and collaborators to provide feedback and support in real-time, no matter their location.

With your operation's widespread adoption of mobile forms, projects and approvals can be completed faster, without sacrificing accuracy, professionalism and optimized record-keeping.
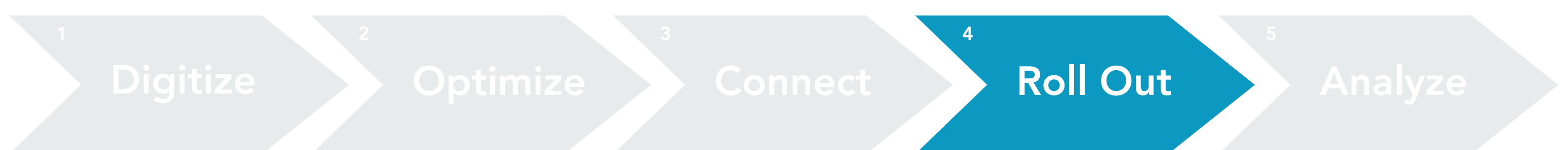
"GoFormz **saves us around $350,000 a year**… it has allowed us to get more sales and work, without hiring more people.""

Peter Burton, Petrol Services Australia

Summary of Phase Four Benefits

- Optimizing for screen sizes (e.g. phones vs tablets) streamlines and expedites data entry

- Offline data capture capabilities allows for completion of work anytime, anywhere

- Digital data collection leads to increased collaboration, reduced redundancies and improved communication across teams and departments

- Offline data capture capabilities allows for completion of work anytime, anywhere

- Cloud storage provides centralized record-keeping and faster form retrieval, as well as time and money saved

1 Digitize   2 Optimize   3 Connect   4 Roll Out   5 Analyze

Make agile business decisions with real-time data

Instantaneous data means real-time results and reporting. Run or schedule reports on up-to-date data, and gather more timely, accurate insights. With more compelling, meaningful insights, your business can begin making impactful decisions. Real-time data analysis allows for instant action and the rapid identification of operational opportunities or obstacles, leading to business agility.

Reports can be easily scheduled and shared with key-players. You can even configure reports to include compelling charts, bringing further context to your captured data.

1 Digitize → 2 Optimize → 3 Connect → 4 Roll Out → 5 Analyze

"GoFormz gives us the ability to aggregate and analyze data we collect from inspections and evaluations. **The insight we've gleaned is invaluable to our business.**"

Global Director of Service, Avanti

Embarking on your digital journey may feel daunting, but it is the first and most important step towards optimizing your operation within the rapidly evolving business world.

Powerful data collection platforms, like GoFormz, make it easy to digitize your forms and their accompanying workflows for use on phones, tablets and computers. Because user-onboarding can be completed seamlessly, users can rapidly learn to harness their new, digital abilities, to provide better data, faster.

How Mobile Forms Work
Make agile business decisions with real-time data

1. Upload a JPG or PDF of your form on a computer

2. Drag-and-Drop smart fields

3. Save your Form and download the GoFormz app

4. Start filling out and completing mobile forms

DIGITAL TRANSFORMATION WITH GOFORMZ

GoFormz is the fastest, easiest and most affordable way to digitze your forms and processing.

▶ **Phase 1** ▶ Creating your mobile form is simple. Just upload a form and drag-and-drop powerful fields (like Text fields, Drop Down options, Images, Signatures and more).

▶ **Phase 2** ▶ Make your forms and processing dynamic with embedded business logic and *Automated Workflows*. Leverage these automatic functions to instantly send data and documents to the people and platforms that need it most (without adding to your to do list).

▶ **Phase 3** ▶ With integrations and a robust API, GoFormz enriches every inch of your operation with timely insights and integrations to other critical business applications.

▶ **Phase 4** ▶ Once you have completed your forms, perfected your workflows and connected your other systems, you can use your forms on phones, tablets and computers to capture real-time, highly accurate data. With a familiar user interface and small-screen optimization, onboarding is made easy.

▶ **Phase 5** ▶ Captured data is instantaneously available for sharing, processing and review — leading to improved business agility and elevated responsiveness.

Interested in learning more about data capture with GoFormz? Email us to request a demo, explore our customer success stories or start a free trial.