

Goodbye paper forms, hello efficiency



Engineers at Irwin M&E are now using RedSky Mobile Forms every day as part of their boiler servicing routine. IT Analyst Kevin Willis explains how digitisation has lightened their load and boosted overall efficiency.

Why did you decide to go down the RedSky Mobile Forms route for servicing?

I have a monthly RedSky update meeting with my senior management team. I told the team that we'd purchased RedSky Mobile Forms, so could now put our existing forms into the system and design our own. The Mechanical Contracts Manager explained that the PPM [planned preventative maintenance] engineers have to complete an SFG form [the industry standard for building maintenance specifications] every time they service a boiler. With 25 different forms in all – one for each type of boiler – the benefits of digitising them were immediately obvious to everyone at the meeting.

The original arrangement involved a lot of paperwork then?

Yes. Each of the 25 SFG forms is slightly different, so whenever the engineers went to a job, they had to bring along a folder with around five copies of each form in it. They used to have to collect fresh copies from the office every now and then, to add to the folder. Looking back, it wasn't an efficient way of working at all – and inevitably, sometimes they would arrive on site and find that they didn't actually have the right form in the folder.



What was the original process?

The engineer would select the correct SFG form from the folder and fill it out while doing the boiler service. They would also take a number of 'before and after' photos of the boiler. After finishing the servicing work, they would check through the form, to make sure they hadn't missed any sections, and use an app to forward the photos to the Admin team. At the end of the working week, they would physically hand over all their completed forms to the Admin team to process and match the forms to the photos.

Having identified the 25 forms you needed to digitise, what was your next step?

All the forms were stored in a folder on the network drive. We already had the templates so I could have just uploaded the existing form into RedSky without any bother. But I sat down with two of the engineers to get their input. Based on

their feedback, I reconfigured part of the basic form design, incorporating tick boxes to optimise the form for mobile. I asked the engineers which were the five forms they used most often and started off with those.

How did you test the new forms?

I designed the first five forms for the system and for mobile. Two engineers trialled them on the system for a week, to see that they were able to complete them correctly and to check that the forms were doing what we needed them to. Then we did a fortnight of live testing on the mobiles – the engineers were also completing the paper versions. And I cracked on with designing the remaining 20 forms. The testing period went very smoothly, with very little tweaking needed. The Admin team experienced no problems with receiving and processing the completed forms either. It all went very smoothly, so we abandoned the paperwork.

What does the new process involve for the engineers out in the field?

The new process is simple and streamlined. The engineers select the right form on their mobile and enter the details on their keypad at various stages during the service. The 'before and after' photos are also now part of the form. Once the engineer reaches the end of the form, they simply tap 'Submit' on their mobile. That sends the completed form direct to the Admin team's desktop.

What do the engineers think of the new digital way of working?

They love it. There's no folder to lug around. They don't have to remember to send their boiler photos to the Admin team at the end of the job. And they don't have to fill in the paper SFG form or a risk assessment form. They're saving around 20 minutes on every job. And the Admin team is no longer on their tail...

How about the Admin team?

They tell me the new process is much more efficient and intuitive. There's no paperwork for them to wade through and no need to chase missing forms and photos. When an engineer submits a completed form, it pops onto the desktop for processing. They check that everything's in order and click on the 'Processed' button. The document then disappears from their screen and the system automatically populates the relevant SGF form with the data and stores it securely.



It sounds like there were very few teething problems.

That's right. And the ones we had were resolved very quickly. There was a little bit of trial and error when I was first designing the form, but that's only to be expected.

How long did it take to get fully up and running?

As a rough estimate, I'd say it took two weeks to design the forms (it would have been a lot quicker if we'd worked off the template). Then we had around two weeks of live testing and a further couple of weeks or so to roll everything out. So I'd say it took around six or seven weeks in all. We were definitely in our stride by June 2021 – the timing was perfect because we prefer to service boilers in schools and government buildings during the summer months.

Have you made many changes to the forms since the testing phase?

We did a bit of fine-tuning at the start. For example, the engineers now key in their name once only and the database automatically replicates that in all the relevant fields on the Word version of the SFG form. Some of the data wasn't quite aligned, so we fixed that too. And we made a few of the form fields mandatory because the engineers were occasionally skipping over them.

As a super user, how easy was it for you to master RedSky Mobile Forms?

RedSky has been developing its Mobile Forms technology for many years now, so I found it very straightforward, as expected. I just read the notes, dug down into the system, did some testing and was happy to take it from there. There was only a little bit of back and forth between me and the RedSky team. If you're system inclined and know how a basic form designer, database and system work, it's something that you can train yourself on pretty quickly. I found it one of the easiest things to figure out how to do on RedSky.

Are you planning to roll out RedSky Mobile Forms to other parts of the business?

Yes, later this year. I'll probably start with electricals.

What would you say to anyone who's considering RedSky Mobile Forms?

I'd tell them to go for it. Increased efficiency has been the main benefit for us. Digitisation has streamlined the process and is saving the engineers and their Admin colleagues a lot of time, effort and hassle every day. Without any previous RedSky experience, the engineers adapted to the new way of working extremely quickly. They certainly wouldn't want to go back to a paper-based system. And neither would I.



About Irwin M&E

Irwin M&E is a contractor that provides the full range of mechanical, electrical and facilities maintenance services to clients across the public and private sectors throughout the UK and Ireland. It has a workforce of more than 200, including office personnel and engineers out in the field.

About RedSky

RedSky software enables construction companies to achieve and maintain competitive advantage. We make real-time actions visible, enabling you to control change, eliminate risk and achieve ongoing incremental gains from improved operational efficiency. Across all types of construction and contracting projects our software is scalable, modular and proven to improve performance and productivity.