



Xtratherm

Client

Xtratherm provides a broad range of innovative insulation solutions for buildings.

Mobile Situation

Xtratherm have a team of 22 sales representatives across the UK responsible for managing builders' merchants who resell their insulation products.

Project

Formworks for iPad delivered to 22 sales staff including the digitisation of a range of sales and contact forms.

The Solution

Utilising our Formworks mobile forms platform, the paper process was replaced with secure iPad forms which include data validation controls to ensure that required information is collected at each client meeting.

The iPad forms are easy to use and available offline so the sales staff can work in no signal zones. When connected, data is immediately transmitted from the field and automatically fed into the CRM system.

Using the Formworks web based form builder and admin portal, the Xtratherm IT team were able to create, deploy and maintain their forms, giving them the flexibility they required.

The Benefits

The Formworks solution has improved the quality of data captured during each account visit, reducing the requirement for later rework or re-visits.

Significant savings have been made through the elimination of paper management, printing and postage.

Data processing costs have been cut through the elimination of back office data validation and MI is available in real time.

The flexibility of the Formworks solution means that data capture forms and processes can be quickly amended in house to reflect the changing requirements of the business.

The Challenge

The sales representatives had been using digital pen in conjunction with paper forms to record contact, visit and sales information.

Whilst the digital pen had the advantage of enabling collected data to be sent back via mobile phone to the centre for updating the CRM and management information systems, the handwriting recognition did not always convert correctly requiring a validation step to be included in the data processing.

Xtratherm wanted to eliminate this additional validation step from the process and also eliminate paper to reduce costs and improve flexibility.