

5 Minute Guide to E-forms

5 Steps to Digitising Audits and Improving Data Quality



E-forms are electronic versions of any paper form; forms – and the data collected with them – are a vital part of many industries. In the service maintenance industry, these forms are crucial for achieving the compliance records so vital to record keeping and communicating the information with clients.

We know that transitioning from these paper forms to e-forms will not only save time, it will improve the consistency and accuracy of your records, reduce any risks of human error and miscommunication, and significantly reduce the time it takes to share the data with the whole team.

Using modern mobile technology to upgrade your systems to e-forms will significantly improve the quality of your data and increase efficiencies in your organisation. This guide is for Facility Management businesses to implement these electronic forms and see significant improvements in data collection and processing in 5 easy steps.



However, we know that this transition can be challenging and complex – which may have already delayed your organisation taking the leap. How that digitising of your records and forms will look needs to reflect the culture and needs of your organisation.

The most important question before you begin the transition is this: what benefits are you hoping to achieve? Do you want to be more efficient? Improve the communication and processing of data? Reduce costs? Ensure the consistency of audits and compliance?

Implementing e-forms in your organisation can do all of these.

Preparation and Planning

5 Key steps

There are forms for so many different aspects of work – from maintenance inspections, fire safety audits, PPE inspections and workload distribution. The first and most important stage of implementing any new system is to plan precisely what result you are hoping to achieve.

- ◆ Set out clear and concise **expectations and guidelines** for what information you need to collect – and, more importantly, why you need to collect it, and what you plan to do with the data you’ve collected.
- ◆ Monitor and check the process to be sure that your **end goal** – gathering meaningful and useful information – is simple to collect, assess, and measure.
- ◆ Which electronic and digital processes can be **automated**? For example, delivery records, invoice processing, payments and working hour trackers; all of these can significantly improve cashflow.
- ◆ Decide which core business systems will need to be **integrated** with the e-form system, to streamline data sharing and automation.
- ◆ Decide which **technologies** to integrate (NFC, barcodes, QR codes) again knowing why you need them and what benefits they will bring.
- ◆ Decide which members of the workforce need this technology, and **train** them to their levels of technical ability, ready to utilise it best.
- ◆ Take the opportunity to review the processes your workforce carry out and data you collect. Question whether they are necessary – remove duplication, centralise data storage and information processing.

Eradicating the need for manual inputting of information may even lead to fewer staff members in the back office resulting in further savings.

Planning

1st

Process

2nd

Quality

3rd

Delivery

4th

Data

5th

Managing the Process

5 Key steps

Processing the implementation of your digital platforms, and making the move from pen and paper to using your e-forms in the workplace, takes buy in from everyone. It involves a lot of checks and measures initially, to ensure that everyone is correctly utilising the system, and getting the most from your investment.

- ◆ Inform every stakeholder (management, admin and support and workers at ground level) and make sure they understand the **benefits** you're working towards, and how to use the systems.
- ◆ Inform and involve end-users – those who will be processing the information, and those who will be using the reports and data consolidated by the forms.
- ◆ Ensure that every necessary member of the team has a device which supports the e-forms system and can access these in the workplace.
- ◆ Plan for regular **reviews** and updates; no new system will meet 100% of your needs – but adapting this digitised process is far simpler than your previous system allowed for.
- ◆ Set **targets for improvements** so that you can track the impact of your digitised system for evidencing ROI with measurable data.
- ◆ Ensure that you understand the **workflows** for each form and that the relevant audience receives completed data and analysis.
- ◆ Simplify the **language** in the forms, and use icons and images in place of lengthy text where possible.
- ◆ Be consistent with the language you use; for example if one source uses the word 'site' and another uses 'building' decide which is accurate, and use it across the whole system to avoid future confusion.

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Quality Management

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There is little sense in collecting any data if the quality of information is poor; this will limit what you can do with the data you have, any plans you can make for future efficiencies, and ultimately limit the future of your organisation.

Though switching from pen and paper to e-forms can reduce many risks, such as human error - often people simply don't fill paperwork in properly, or important forms might get lost or damaged. It's still important to regularly review to ensure that the quality of information remains consistent – retraining staff where mistakes are being made.

There are ways to create your system which will reduce these risks. Make sure collecting and inputting information is as simple as possible, so that your team find it efficient and are keen to make use of this new tool, rather than being frustrated by something which isn't user friendly.

- ◆ Consider any data outputs and reporting format when forming the questions and designing your templates.
- ◆ Design and features can be shaped to suit your devices; smartphones and tablets function differently, and your system is built to your preference.
- ◆ **Pick lists** and option lists can be input as menus and drop-downs which your team can select from.
- ◆ **Signatures, checkboxes** and **photographic evidence** can be included digitally and assigned to the form.
- ◆ Very little manual text entry might be required in most incidences – simplifying the process of inputting information.
- ◆ Each e-form follows the defining **data outputs** and **reporting** requirements, collecting only the data you need.

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Once a system is integrated there are often teething problems as people adjust to the new way of working. We recommend and support a process of continued review and monitoring, reporting in real time to identify patterns of poor quality data. Consider retraining staff members who are incorrectly using the system, or adapting the system to suit feedback from the workforce who may have identified additional requirements.

- ◆ Make your forms easy – over complicating things will mean your staff are reluctant to use the system.
- ◆ Make the process simple to repeat.
- ◆ **Pilot** the new system with a small proportion of the team initially: be sure to balance this pilot between a range of employees – those with a lot of experience, new members, older members and young, those with technological minds and those who struggle, to truly assess the realities of implementing it in your team.
- ◆ **Assess** their successes and improve where necessary before rolling out to the whole organisation.
- ◆ Ensure that suitable reporting is in place to monitor the process of digitising your data collection and review.
- ◆ Be prepared to act quickly, making changes in response to **real-time feedback** from your workforce, to ensure that the data being collated is high quality.
- ◆ Continue this **monitoring** and improvement process as needs evolve.

Remember that not all forms are suitable, and not all information is worth digitising. Be truly honest about whether it's worth investing time and finance in digitally capturing all the information you have on paper.

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Data and Reporting

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The final part of this process is assessing your data: all of what comes before is simply to get you here – seeing the information you have collected, and being able to use it for compliance and improvements in efficiency, finances and business planning.

Data is King – and the right system, used properly, can revolutionise your facilities management business in ways you perhaps haven't considered previously. With manual systems, the more information you gather for assessment, the greater the risk of error and misinformation. Digitising the process significantly reduces the risk of inconsistencies, and allows you to manage and improve the data collecting process.

Remember that data is far more than just snippets of unrelated information; far too often, we see people collecting vital information and doing no more than filing it away. These systems can assess your data and identify areas where you can improve.

- ◆ Scanned documents are not data; the **value of data** is far more than a flat image.
- ◆ Data is actionable in **real time**; your organisation can respond to information as it happens, streamlining your work orders, identifying where you can save money, time and investment.
- ◆ Consider ways you can add further value by incorporating other technologies you already use – simplify your processes, **automate reporting** and compliance.
- ◆ Consider how data you have previously collected can be used to improve the repetition of information – for example, **identifying patterns of data** in previous visits or records and pre-populating e-forms for future site visits.
- ◆ These e-forms not only collect and process data, they can identify where processes, efficiencies or even staff do not meet your standards allowing you to make improvements and streamline systems and processes in future.

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Overview

Remember, simply collecting this data and filling in forms is not the point of this process. It's what you do with the data you have collected that will make a difference to your organisation.

Your e-forms have many **benefits**, and the data provided identifies areas where financial savings can be made:

- ◆ Real-time information at your fingertips
- ◆ Overview of workers and performance at a glance
- ◆ Comparative data in one easy to access location
- ◆ Management tool for remedial and corrective actions
- ◆ Lower cost for managing both people and time
- ◆ Reduced risk of error or missed information
- ◆ Better standard of compliance and audit completion
- ◆ Improved commercially beneficial knowledge
- ◆ Lower cost of storage and back-office staff for processing the data vital to your organisation

Following the five steps identified in this document will help define and control your e-form strategy. Correctly implementing your software will give you a simplified working process. Your team can easily gather and share information, report issues in real time, provide photographic evidence with notes, and compare information with previous inputs and reports.

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