CUSTOMER INTERVIEW

Tanknology Goes Paperless

Hosted by:
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Liam

I am very glad to be joined by Jason Bloch, Manager of Inspection Services at Tanknology. They have been a customer of ours for a couple of years now, using the AT&T Mobile Forms application in the field with their employees. So, Jason, tell me about how you heard about us and how you came to AT&T Mobile Forms.

Jason:

Thanks for the opportunity again. My name is Jason Bloch with Tanknology. For a little bit of background on our company: we are the largest provider of tank testing and environmental compliance services, specifically for the petroleum industry. We are based out of Austin, Texas and I am located out of a remote office in Cleveland Ohio. We've ben in business for about 30 years and have tested well in excess of a million tanks, visiting more than 50K sites per year. We've got a presence in 27 countries across the globe. My role is to oversee our national inspections program. We currently have 17 inspectors across the country and we're inspecting more than 2K facilities each month.

We found AT&T Mobile Forms through a little bit of trial and error. We interviewed quite a number of vendors when we made the decision to go from a pen and paper solution to all digital. Through AT&T, we were connected to ProntoForms [AT&T Mobile Forms] and went through what we were looking for, our list of wants and needs, and the types of problems that we were trying to alleviate. We settled on ProntoForms [AT&T Mobile Forms] as really a great solution for us.

Liam:

Tell me a little bit about the types of business and operation processes you were looking to improve in the field. As you heard earlier, we try to tackle it all, but where did you see a good fit for the AT&T Mobile Forms application?

Jason:

When we were using pen and paper, we were doing about 300 inspections per month in a very limited geographic area. When I came aboard to this role about 3.5 years ago, we identified this as a real growth opportunity for our company. It was really in its infancy and the regulations requiring these inspections were really just starting. We are really still just getting going. At two thousand inspections per month we're really just starting to hit the ground running. There is still far more room for growth.

What we identified were some kinks in our workflow. Number one being that every inspection required our people to go back to either their home or their hotel at the end of the evening and spend as much as 2 hours each night scanning in documents into our database and uploading those documents to complete the workflow. Then on the back end, our QA/QC review process was really arduous. We were deciphering poor handwriting, correcting spelling errors, and sending forms back to our technicians for corrections on various mistakes. Ultimately we needed to find a solution that would decrease the amount of time it took us to deliver the final copy of our report to our customers and produce a higher quality, presentable report.

Liam:

So really it's not just the employees saving time; at the end of the day what they're producing is something that you want to get in the hands of your customers quickly, that's the solution you're providing. Thanks for that detail. How did the deployment go? If you got this in the hands of your field employees, what was their initial reaction?

Jason:

Like all things, there was a little bit of a learning curve. Some of these folks weren't very tech savvy. As I'm sure most people can attest, the iPad, which we are using almost exclusively using, is a pretty user-friendly device. Once we got over the initial hump of teaching people to move into the 21st century, the deployment was easy.

On the development side, we worked hand-in-hand with AT&T Mobile Forms. The integration took about a month and we had several consultations with our IT staff, our developers, and representatives from AT&T Mobile Forms just dialing in what we needed, the forms that we needed, how they had to look on the output side, and what they needed to look like on the input side. Then we were able to put it into a production environment pretty quickly.

Liam:

That's great. As I mentioned in the demo earlier, if you have a project that you want to undertake, you're not alone in finding a solution. We've got experience, so

you can come to us with the overarching plan and objectives for the project. I love that you mentioned the output because customizing that document that is being sent out is a big part of what we do. So you had gone through some integration, was there anything else you needed to integrate the AT&T Mobile Forms solution with?

Jason:

Absolutely, so we utilize a proprietary system called Tanks on our back end. Tanks is our be-all and end-all. It's where we do all our scheduling, work orders, reviews, invoicing.

Tanks talks to some various systems; ERP systems, CRM systems, but it is our central hub for everything Tanknology. One of our criteria in choosing a vendor was someone that could integrate very tightly because we did not want to change the way that we do business.

Our workflow is essentially uploading these 2,000 work orders every month in batch. There is very little inputting of site information. All that site information is pre-loaded. The only thing I need to do on my back-end is add the inspector that it is assigned to, the date, and the time, and I upload that information into our system. That information is filtered down into the AT&T Mobile Forms app. When our users go into their app, they go into the Inbox and they see all of their work orders formatted with our internal work order numbers so they can cross-reference that, and the header information is already pre-populated in the form. What that means is that if we're going to Gas Station #1234 in Springfield, MA, for example, the user doesn't need to worry about manually entering site information in the form. For us, it means far fewer errors, spelling mistakes, inverted addresses, and things that we would normally have to QC before, because the data is coming from our system.

Liam:

Nobody should have to input anything twice, that's a key point right there. If you've got the data at the office, let's give employees in the field access to it as required to query and have information at their fingertips. We can also make sure that when necessary, important data can be in a read-only field that they can't edit. We also see that some of our customers are hiding values from the form so the field employee is only seeing the information that's pertinent to them.

Jason:

Correct. By using a script on our back-end that we've written, the file name for each inspection corresponds to an internal work order number. When our users hit submit on their iPads, the inspection form leaves their Outbox, goes to a Sent folder, and is stored in DropBox. Our system looks for any new files every 15 minutes. It finds the work order number, uploads the data into our back-end, and changes the report state from "Prepare Report" to "Review Report".

We have staff on the back-end that can do the QC. This means our inspectors don't have to go back into our system and send it to us – it's automatically sent as soon as they submit it from the ProntoForms app.

In addition to the integrations that I've mentioned, we also gather XML data. The pdf that's uploaded into our system is ultimately sent to our customers, but we also get an XML file which is "live data". So we're able to parse that data and identify any deficiencies that were found during the inspection – anything hypothetically that has a 'no' answer would be an undesired response. Those 'no' answers are queried and filtered into a notification system on our back-end where we can go in and send notifications to our customers, letting them know any deficiencies we found during that day. That's a huge value-add for us.

Liam:

That's great Jason, I love the example of a mix of off-the-shelf, easy, simple to setup integrations like DropBox and then the ability to run scripts and actually pull in the data as you need it into your systems, that's a great example for people and companies who might be thinking about how to take this on.

I want to encourage companies to look at applications like DropBox, Google Drive, and One Drive, as simple ways to get your documents saved efficiently in your back end system. As I said, we can dynamically send those documents to one or many locations. I've seen a lot of my customers actually come to me and say their customers want the forms to go into their DropBox

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account, and ask me if that is possible. We can actually filter these data destinations so specific custom documents go to the right customers. That's a great example, that's where the expertise of our vendors, our partners, our resellers, and AT&T of course, comes in, guiding potential customers who are interested in this product through the maze of all these different applications and ProntoForms/AT&T Mobile Forms. I said earlier, we are kind of the interface between people and systems. What other feedback have you gotten from other stakeholders in this whole process?

Jason:

The inspectors themselves really like the application. That's first and foremost. They find it really easy to use and once they have maybe a week, maybe even a couple of days with it, they get very comfortable with the flow and the way the app works and the response that they get from the app. Our sales team find it to be a very effective sales tool. We are able to walk into customers locations, prospective customers, and show them this is what we're doing, this is how we're different from our competitors and this is the secret sauce that makes us who we are and able to do what we do. It's a very effective presentation tool. They've been impressed with the professional final product; they've been impressed that we can do things like add GPS-stamps. In our business it's all about compliance, risk management, and risk mitigation, so for a customer to be able to see that as a company, not only do we go out and do the inspections, but we will back it up and prove that we were there, and when we were there. They find that a very compelling argument.

With rich data in the form, not only are we telling them about the deficiencies that we find, we are embedding photos right into the report. It's another compelling argument for why they should do business with us and we've found a lot of success with it.

Liam:

I like that it's not just your field employees that benefit, it seems like it's been something that you've been able to scale up and deliver some results to your sales reps and actually positioning this as a product and a reason to choose you as a vendor. I think everyone can relate to having someone come to your home or business and perform some work and then they leave you a yellow sheet of paper that explains how much money you owe them but it doesn't give you that feeling that you got that value that photos and a GPS stamp can contribute to. Thanks Jason for that, so tell me about what the future holds for Tanknology. Any new ideas on mobilization?

Jason:

One of our big initiatives for this year and into next year is to come up with a good, advanced analytics platform. Whether it's using a combination of external software and our internal system or exclusively on an external platform, we want a place where our customers can go and in real time have a dashboard of all their metrics, any deficiencies that we're finding, what the most common deficiencies are, how many times this is recurring, across what subset of their facilities we're having the same issues, and then any issues that are recurring month over month that maybe they either haven't fixed or maybe keeps coming back. We want to be able to put all that information at our customers' fingertips and to really solidify ourselves as not just a truck roll partner, but really a data-driven analytics partner.

Liam:

Jason, I love all this. Thank you for joining us. I am a sales rep and on the road, all the time fueling up, so just knowing that Tanknology is out there inspecting these facilities and making sure that they're safe and compliant makes me feel good.