

DIGITAL TRANSFORMATION WHITE PAPER

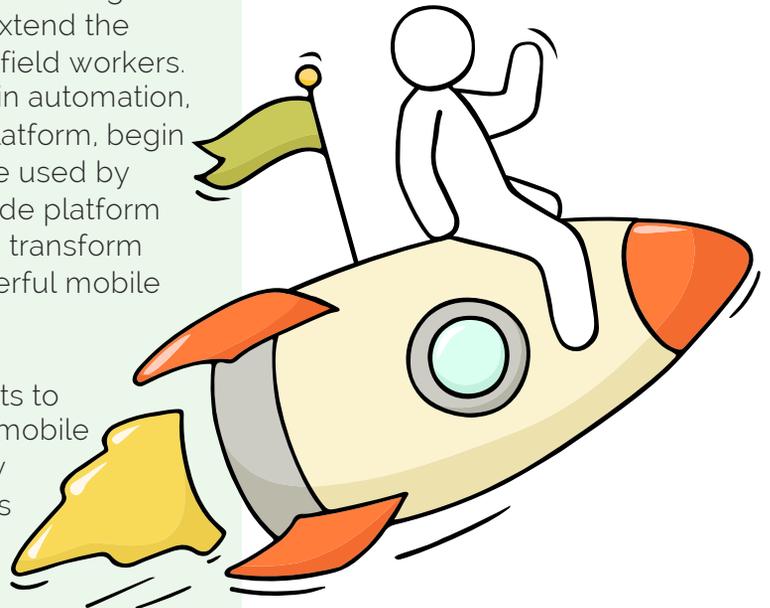
# 7 Secrets to Turning Your Paper Forms into a Mobile App

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Transitioning your company from paper to a digital enterprise can be a challenging and daunting task. Your company might be thriving with customer relationship management (CRM) tools and accounting software, but now you need to extend the flow of this digital information to field workers. Those who are most successful in automation, using a no-code mobile forms platform, begin by obtaining paper forms that are used by field workers every day. A no-code platform can provide you with the tools to transform these paper processes into powerful mobile apps.

In this article, we list seven secrets to transforming paper forms into a mobile app successfully. If you have any experience with web applications and Microsoft Excel, you will quickly discover that designing your own app with the no-code design tools available in Forms On Fire will flow naturally.

When it comes to allocating funds toward process improvements, companies want to know what they might receive as a return on their investment. The first three secrets shared in this white paper focus on how to estimate this return. In most cases, your ROI will exceed 300% in the first year. Once you know your ROI is positive, moving onto the next steps will help you get things moving quickly.



# 1 Identify High Usage Forms Used by Field Workers

To identify forms that will make good candidates, you need to first meet with the people who use them most frequently. Arrange meetings with some of your top field workers, technicians, salespeople, and supervisors. Create a list of these forms, how frequently they use them, and how much time it takes to complete them on paper. Often these include inspections, safety reports, audits, orders, and many more.

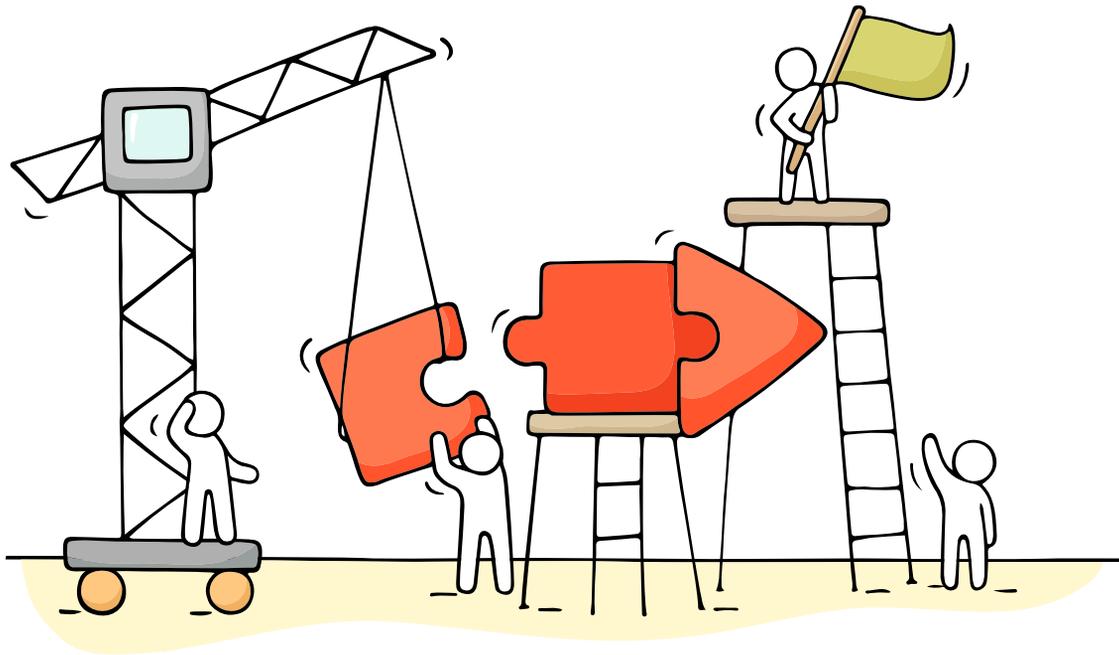
Take your time with this process and be as thorough as time will permit. Companies that really dig in can discern between forms that may be superfluous and those that are imperative to the business. Understand how these forms are used. What information is captured that makes it necessary for the field worker's job? What information does the field worker capture that is useful for office workers? It is critical to note what information is required versus what might be "nice to have." Ask the field workers to prioritize based on importance. Keep track of their preferences, but also make your own priorities.



Jot down ideas that come to mind of other information that may prove to be valuable such as photos, signatures, and GPS locations. Think about what will be useful when applying the device capabilities of today's smartphones.

Be sure to ask how many forms they complete each day and how much time each form requires. This will be useful as you calculate savings by moving to a mobile app from paper and clipboard. Finally, ask for an original design of the forms in Word or Excel. It will be important to obtain a few completed forms as well.

# 2 Identify Re-entry, Assembly, and Distribution Procedures



Now you will need to understand how the office and administrators work with the information collected on paper. How do the forms get to the office? What processes are involved with the forms? Is the company paying office personnel to re-enter information into a database? Is the form re-created using Word or Excel for legibility? Is there a re-assembly procedure where the office workers are combining photos and other information from the field workers in addition to the hand-written form? How much time does all this effort require?

In addition to the work done on these forms, you may need to find out if there is a workflow within or outside the office for the forms. Is a form forwarded for modifications or approval? How many steps does it follow? At each point in the steps, can the form be sent back to the sender? How are the forms distributed and how do people receive notification of their step in the process? It cannot be emphasized enough to take copious notes on this discovery process.

Finally, what is the final distribution and filing of the forms? Where do you send them? Does a copy go to accounting? Is a copy transmitted to the customer? How much time does the distribution of forms require for the office workers to complete?

# 3 Calculate Your Return On Investment (ROI)

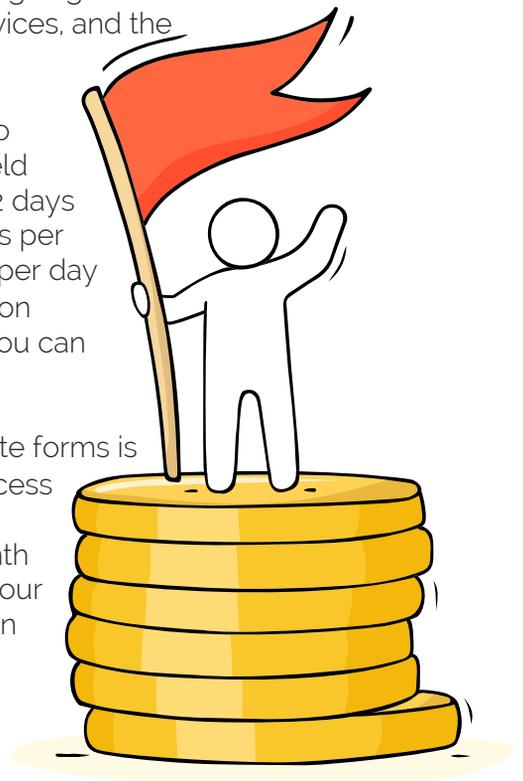
Here is where it pays off. In this step, you will combine the information captured in steps 1 and 2 above and compile that into a financial model. Utilize this information to justify investing in a mobile form platform for your forms.

Add up the field workers' time required to complete paper forms. On average, you can expect to save about 25% of this time by going mobile. This is possible with voice-to-text capability of devices, and the reuse of data in drop-downs such as status, company Names, dates, and more. Multiply the total time saved per month by the labor cost. For example, if the time it takes to complete a paper form is 10 minutes; and you have ten field workers; and each user completes 10 forms per day for 22 days per month, you can expect that will require 22,000 minutes per month, or 366 hours. (10 minutes X 10 workers X 10 forms per day X 22 days per month). If that labor costs you \$35 per hour on average, your total field labor cost per month is \$12,833. You can expect to save about 25% of those costs.

Office personnel who assemble, re-enter, file, and distribute forms is the next part of your calculation. Often this part of the process will require twice as much time in the office as in the field. Using the number above, this could be 732 hours per month of re-entry, edits, etc. Office personnel that cost \$20 per hour will bring you to a total cost of \$14,640 per month. You can expect to save 80% or more of this cost per month by automating the re-entry, assembly, and distribution.

In the above example, your monthly savings amounts to \$14,920. ( $\$12,833 \times 25\% + \$14,640 \times 80\%$ ). A typical cost of going mobile will be in the ballpark of \$35 per month per user. With 10 users in the field and 4 in the office, you will have a monthly expense of only \$490. A 3,000% monthly return on investment will get any business owner's attention.

If you don't want to do this by hand, we've designed a free ROI calculator available on our web site which [you can access here](#).



# 4 Get Started with a Free Trial and Design Your App

Now it is time to put your skills to work. Look for a mobile forms platform that gives you a free trial, like Forms On Fire. Don't be shy, look around the platform and ask for help if you get stuck. Grab a form that you received from the research earlier and just start building it. With your field workers in mind, think about how they will interact with the app on their screen. In Forms On Fire, we call this the screen designer.

Without any programming skills or training, you can simply drag the fields you want (text fields, number fields, photo fields, date fields, signature fields, etc.) into your screen palette. Each field allows you to define any

business rules, such as whether a field is required, when the field shows or hides, and any branching logic based on previous answers.

As you're designing your app, you can save your work and immediately test the app on your device. Bring up your phone, or tablet and make sure it works like you expect.

You'll notice that a good mobile forms designer allows you to capture much more rich information than any paper form will allow. Below is a list of such capabilities in the Forms On Fire platform.



[Try Forms On Fire](#)

- Text, numbers, date, & time
- Choices / lists
- GPS and mapping
- Photos, gallery & sketching
- Video & audio
- Signatures, including contactless signatures
- Barcodes
- Hidden fields
- Action buttons
- Repeating data
- File attachments
- Database connections
- Process and workflow steps
- REST API
- Near field communication (NFC)

# 5 Design Your Report Layout

Now that you can collect the information digitally, you need a way for this data to automatically fill out your reports. You can achieve this by taking the paper form designs (Word/Excel) from step 1 above and use them as a template. Leading mobile forms platforms will take advantage of the forms you already designed for use with pen and paper. Some platforms require you to create your report layout based on a proprietary PDF based programming tool, which is typically very limited giving you less control. With Forms On Fire, we use pure Microsoft Word and Excel.

You have likely heard of "mail merge" used for years with Word & Excel, you simply place your field names where you want the data to appear within your template. For example, a field that you may have called customerName in the screen designer becomes {customerName} in your Word report template. This is true not only for text, numbers and dates, but also for signatures and photos.

After designing your template, you will want to test it. This is easily done by uploading your report template in association with your screen using a connector. Find out how to do this in the next section.



# 6

## Distribute Your Forms

Once the report template is complete, we can now design connectors that allow you to automatically distribute your forms to those who need them. Email connectors are very popular for getting information directly and immediately to your customer. The email connector can include the field person who initiated the form as well as any standard distribution list in your company.

If you need your reports to look differently from one audience group; for example, your customers receive a different report than your accounting department, you can create two connectors that distribute the final report to these two different groups.

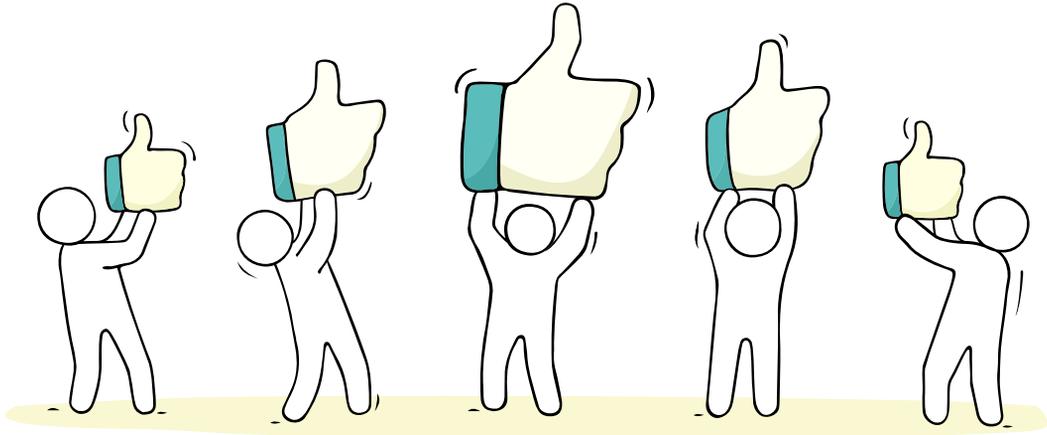
An enterprise-grade platform like Forms On Fire will give you the ability to choose which report format you want delivered, such as PDF, Word, Excel, CSV, etc.

You may also want to add other connectors to file your documents in cloud storage, such as Google Drive, OneDrive, Dropbox, etc. And if your mobile forms provider is truly advanced, they should be able to send data using an open API to any database you may have.

The final step, testing, should always be considered.



# 7 Test Your Forms / Get Feedback



Test, test, test. In this last step, it is critical you test each of your newly built forms from end to end. Invite one or more of your field personnel to try out the form. Let them critique your work and offer suggestions about what other information may need to be captured and where distribution could make their jobs easier. For example, if parts are to be ordered, does your parts department need notification of a new work order that requires parts?

In testing, allow those who will use reports to receive them and provide feedback. What more do they want? Does the look and feel need to change? How do they like the time it takes to get from the field to the customer? Ask your marketing department

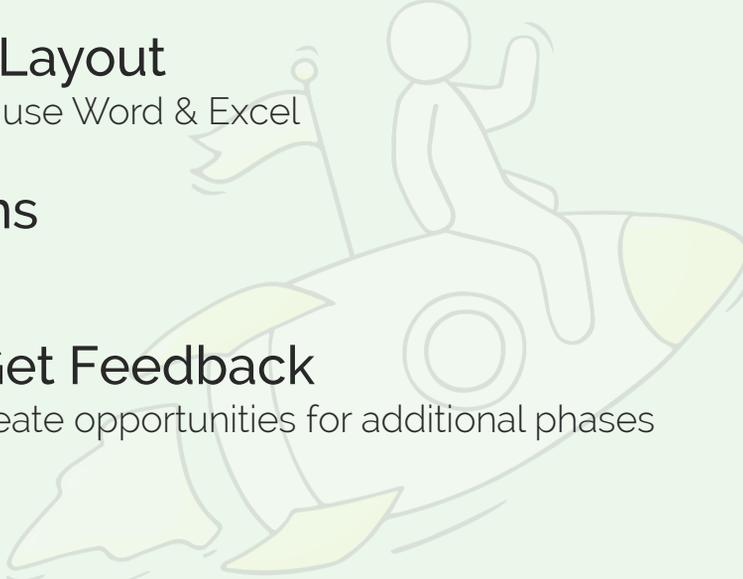
if they want to begin promoting or cross-selling other products or services to your customers. Do executives need a dashboard of real-time data coming in from the field? If so, perhaps you want another connector directly to your data warehouse or business intelligence platform.

Be sure you're meeting the needs of your company and especially your customers. Some ideas may need to be implemented in a phase 2. Remember, tout the ROI you calculated in step 3 so momentum continues.

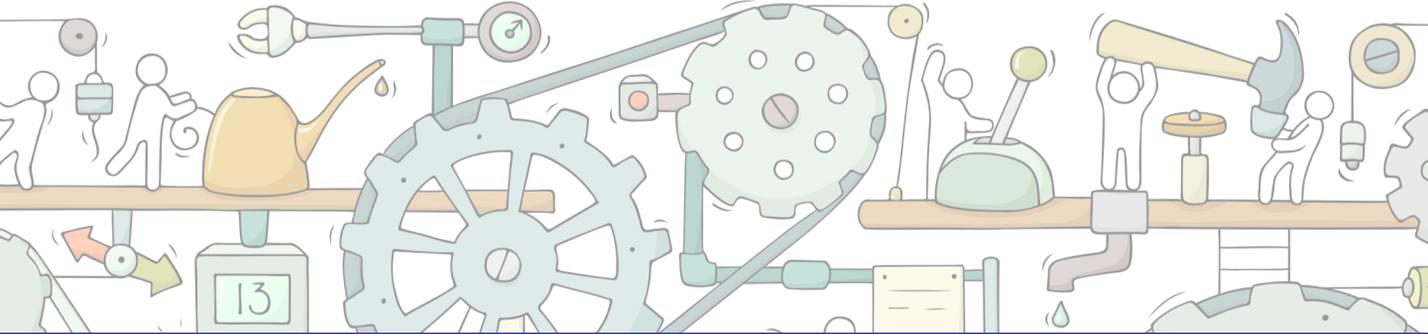
You will find with moving from paper to digital, the possibilities are endless.

# 7 Secrets to Turning Your Paper Forms into a Mobile App

- 1. Identify High Usage Forms Used in the Field**  
Organize by field priority, and by cost priority
- 2. Identify Re-entry, Assembly, and Distribution Procedures**  
Count the hours required for each step
- 3. Calculate Your Return On Investment (ROI)**  
[Use an online ROI calculator](#)
- 4. Get Started with a [Free Trial](#) and Design Your App**  
Often this can include multiple users
- 5. Design Your Report Layout**  
Professional grade platforms use Word & Excel
- 6. Distribute Your Forms**  
Hundreds of possibilities
- 7. Test Your Forms / Get Feedback**  
Often the excitement may create opportunities for additional phases



Ready to get started with a free trial?  
[Visit our website](#) and Try It Free!



If you want to fundamentally transform your company from a digital perspective, that is going to mean a whole set of choices that the ROI will help you get buy-in. Your leadership must role model what it means to be a digital organization – the flexibility of decision making, the agility in terms of speed at which you can move. Focus on the return on investment (ROI), ease of use, speed from the field work to the customer. With the right platform, we're talking days, not months and years.

For more information about Forms On Fire,  
[Book a quick chat with us today!](#)

