FOR Energy

FOR Energy streamlines the completion of their digital audit reports and quotes by utilizing the Salesforce integration.

"An audit takes a while...so to be able to shave time off of that is pretty valuable for the customer experience."

– Vladimir Kostovski, Salesforce Consultant, FOR Energy

Challenge

Although FOR Energy had previously implemented GoFormz, they had not yet leveraged the Salesforce integration, requiring in-field auditors to reenter information already captured within digital forms into Salesforce in order to complete a quote. This additional, manual data re-entry resulted in delayed quote generation which made for an inefficient workflow.

Solution

FOR Energy utilized GoFormz's Salesforce integration in tandem with Automated Workflows to streamline field data entry, save time during audits, and simplify the administrative processes required to generate sales quotes for customers.

Results

- ✅ Significant time savings of 20 hours/week
- ✅ Data is easily passed between field auditors digital forms and Salesforce records
- ✅ Submitted forms instantly populate a quote for sales team members
- ✅ Auditors can fill out forms digitally within an interface they recognize and understand
- ✅ Enhanced customer experience

Digital Form Type

Digital Audit Report

About FOR Energy

Founded in 2010 in Phoenix, Arizona, FOR Energy helps homeowners maximize the energy efficiency of their homes with specialized Home Energy Check-Ups, Windows, and Solar Energy. FOR Energy is a participating contractor in the Home Performance with Energy Star program while also being dedicated to building a brighter future for their community. Meanwhile, they provide sustainable solutions for their customers that can lead to an increase in home value, reduction in energy bills, and peace of mind.

The Full Story

FOR Energy implemented GoFormz to digitize their Home Energy Check-Up Audits for use on phones, tablets, and

computers. With digital transformation top-of-mind, they sought out GoFormz to help streamline their audit processes, however, there was still a piece of their process that remained broken and inefficient.

Integrating with Salesforce

FOR Energy's process of capturing customer information and inputting data into Salesforce created manual, costly administrative burdens. For their auditors in the field, FOR Energy needed a way to have a customer's information on hand and readily available to be referenced within Home Energy Check-Ups. In order to avoid the inconvenience of needing to ask customers to provide their general information again, FOR Energy decided that they needed to integrate their GoFormz digital forms with their Salesforce records.

When Vladimir Kostovski joined FOR Energy as a Salesforce Consultant, he saw the opportunity to integrate Salesforce with GoFormz and take their digital form processes to the next level. As their business grew, FOR Energy knew that they had to continue to iterate and improve their operations in order to create a more sustainable and efficient process for their employees and customers. Now, when a customer fills out an appointment request form on FOR Energy's website, this general information is automatically synced with Salesforce and triggers the creation of a Home Energy Check-Up appointment within their system. After an appointment is created, the information that the customer filled out for their appointment request is then automatically populated in a digital Audit Report within GoFormz. The remaining necessary information is then filled out by an Auditor in the field via GoFormz's mobile app.

What makes this process truly unique is that once a form is completed, the submitted form and captured data are automatically routed to Salesforce, triggering the generation of a quote, instantaneously. The administrative office then receives the quote from the auditor in the field and has the ability to look over their recommendations based on real-time data and determine their sales strategy for the project. Vlad explained, "it's a significant portion of our operations. Every sale that we make on the home improvement side uses that report." The only part of the process that requires human intervention is double-checking the quote after it is generated. With the help of GoFormz, FOR Energy went from a very manual and time-consuming process to a completely automated and efficient system for generating quotes.

"We have 5 or 6 audits a day, 6 days a week, times 30 minutes, that's quite a lot of time."

– Vladimir Kostovski, Salesforce Consultant, FOR Energy

ROI

FOR Energy is dedicated to providing spectacular service to its customers. After integrating GoFormz with Salesforce, Vlad explained there were several significant improvements to their processes that lead to happier customers and employees. During the audit process, customers no longer need to provide their general information to the auditor. Due to the Salesforce integration, digital forms can now be automatically dispatched with pre-populated integration data – accelerating form completion and improving data accuracy. As Vlad stated, "We have 5 or 6 audits a day, 6 days a week, times 30 minutes, that's quite a lot of time." As FOR Energy was able to cut down on time in the customer's home, they have seen the overall customer experience and satisfaction improve.

What's next?

Since implementing the GoFormz and Salesforce integration, FOR Energy has noticed a decrease in errors within its audit and quote process. Data collected from the field is instantly transferred into Salesforce,allowing administrative staff the ability to catch errors sooner. From an employee standpoint, the auditors are satisfied with GoFormz because it eliminates the need to double-check information with the back office before heading to an appointment. Meanwhile, the office administrative staff is no longer required to manually update customer information into Salesforce and can shift their focus onto more important tasks. Vlad states, "the sales rep has more time to look at the quote to make sure it's right and study it a little and get ahead of the sale prior to the appointment."