

CASE STUDY

Walter Surface Technologies increases productivity and reduces costs with TrueContext

**BUSINESS GOALS**

- ✓ Improve form accessibility
- ✓ Reduce amount of data entry
- ✓ Reduce data entry errors

RESULTS

- ✓ Immediate access to form data captured in the field
- ✓ Elimination of manual data entry
- ✓ 2/3 Cost Reduction of monthly technician fees

The Challenge

Founded in 1952 and established in seven countries, Walter Surface Technologies is a leader in surface treatment technologies, providing high productivity abrasives, power tools, tooling, chemical tools and environmental solutions for the metal working industry.

In 2009, Walter created a new Canadian CARE service department. The division already includes multiple technicians across the country in every major city and is constantly growing, with each technician making up to 50 service calls a week.

“Prior to TrueContext, our technicians would complete 21-point equipment inspections and other tasks using paper forms. At the end of the week, each technician would send all completed forms via courier back to head office. We would then have a dedicated office clerk input all of the information in our software management system,” explains Stephane Turpin, Walter National Manager, Care Service.

Furthermore, the office clerk would have to sort through the handwritten forms, sometimes with handwriting errors, and pick out the information required to be entered into the databases. Since this was a manual data entry process, there was the added risk of additional human error.

“Having a paper form process meant that we had a lot of filing to do as well. When a customer would call with an inquiry about a recent Walter technician visit, we had to take the time to search through our paper filing system.”

WALTER SNAPSHOT

- ◆ 500 weekly paper transactions
- ◆ Full-time Data Entry personnel
- ◆ Courier/printer/specialty ink & paper costs

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The Solution

While Walter was searching and testing various mobile solutions, it was wireless carrier Rogers that suggested TrueContext, a mobile form solution for smartphones and tablets. TrueContext facilitates the collection of form data on mobile devices, and connects the information immediately with any back office system or other data destination, including popular cloud services.

“Switching from paper forms to mobile forms on tablets was a scary idea for some of our technicians. But they all love TrueContext. They find it intuitive and easy to use – even the guys who had never used a tablet before!”

Walter was able to tie in TrueContext with its software management system. This now allows office coordinators to send out new jobs requests to technician devices. Submitted field data is then immediately available in the office management system.

Today, technicians continue to capture customer signatures and provide instant copies of transactions via emailed PDF (ex. work orders, sales quotes, service contract forms and sales delivery confirmations). equipment inspections and meter replacement. “There’s a lot of different forms we can use it for.”

The Benefits

As a result of the switch to TrueContext, Walter no longer employs data entry personnel or incurs regular courier costs.

Walter also includes internal reminders and instructions for technicians in each form, to better guide them through each customer visit.

“Since TrueContext is highly scalable, we are ideally positioned for growth and to add more technicians in the field, without the requirement of additional office staff.”



While signature capture within the form is important, we're also taking advantage of the custom branding capability, allowing us to put the Walter logo on all PDF outputs to the customer, as well as on the TrueContext App itself. To be able to brand everything Walter was a big selling point.



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