



Woodford Heating & Energy are utilising Klipboard to facilitate their business systems and run efficient, productive processes, enabling them to focus on growing and developing their business.

#### Background

Woodford Heating & Energy are Mechanical Services designers and installers who have supported London's foremost residential and commercial developers for over 20 years. Alongside the traditional mechanical services they provide, they are also experts on Renewable Energy covering, Solar Thermal, Biomass Boilers & Heat Pumps. Their reputation for handling large scale and complex projects and delivering excellent workmanship precedes them.

#### Challenges

For years, Woodford used traditional paper methods for processes such as their Air Pressure Tests, Benchmark Card, Mechanical Handover Sheets and Hot Work Permits to name a few. They spent time on site completing paper documentation for each apartment unit, approximately 10 types of documentation, within large construction sites that usually had 100 apartments or more. This resulted in a lot of paperwork to complete and then collate for return to the office, where the information was then filed and required to be kept for several years. Working on many different sites geographically meant this was a long and time consuming process. This wasted both valuable time and money, caused issues with storage and delayed any reporting or presentation of paperwork to their customers / site contractors.

[www.klipboard.io](http://www.klipboard.io)

“ Moving to Klipboard has streamlined our on-site processes and helped to motivate our staff along with removing our dependency on paper forms. The enhanced ability to find documents has reduced wasted time searching through manual paperwork. It has already reduced the money spent on our processes whilst also allowing us to focus on other areas of our business. ”

Steve Abbott, Operations Director, Woodford Heating & Energy.



## Answer

They decided to look into digital methods to assist their business processes and realised that adopting cloud based technology with a strong emphasis on mobile for their site workers would be the best way to solve the challenges they were facing on a daily basis.

Klipboard was brought on board as a trial to start with, in order to fully see the benefits before implementing the system throughout their business. The tablet app immediately allowed for data to be captured on site and sent back to the office in real time, automatically being filed against the relevant site / customer.

## Results

Klipboard was up and running throughout Woodford Heating & Energy within an hour for their trial, and once they became a Klipboard customer, they received training sessions for their field users around the country. The impact of Klipboard over the time they have used it has been to streamline the communication between their sites and office, increasing the rate at which they are able to provide customers with completed forms or reports.

The initial feedback has been how simple and effective Klipboard is, how intuitive the platform is to use and the extensive, comprehensive support that Klipboard has provided them from the initial setup. It enables them to quickly and easily access completed forms or reports for reference within a matter of seconds which can then be sent to their customers in a stylised format. Klipboard has eradicated the need for filing space and increased the efficiency and productivity of the staff. It has connected their site managers with the office in real time and in turn, improved the overall experience and satisfaction of Woodford's customers.



Schedule &  
Allocate from  
the Office



View Tasks &  
Capture Data  
on a Tablet



Complete,  
Review & Store  
in the Cloud