



Solutions for Field Service  
and Enterprise Asset  
Management plus mobile  
and online form builders

# CASE STUDY

**PATERSON SAFETY  
ANCHORS  
DIGITISES  
OPERATIONS AND  
IMPROVES  
REPORTING WITH  
PRO-FORMS®**



## CUSTOMER

Paterson  
Safety  
Anchors Ltd

## SECTOR



## SOLUTION

pro-Forms® WORK  
MANAGER  
Mobile Forms and  
Quotes

## THE CHALLENGE

Paterson Safety Anchors Ltd operates in a highly specialised sector, manufacturing and servicing safety equipment for working at height.

Due to the unique nature of their services, finding a system that could adapt to their workflows proved difficult. Many available solutions were designed for more mainstream trades and lacked the flexibility required.

The business relied on paper-based processes, particularly for reporting and documentation. Producing and distributing PDF reports required manual effort, while limited reporting capabilities made it difficult to gain deeper insights into operations.



## THE SOLUTION

Paterson Safety Anchors Ltd implemented pro-Forms® WORK MANAGER, alongside Mobile Forms and Quotes, to create a fully digital and highly configurable system.

The flexibility of the platform allowed the team to build forms around their services, rather than adapting their processes to fit the software.

With pro-Forms®, the business was able to:

- Replace paper processes with a fully digital system
- Automatically generate and send PDF reports from site
- Use conditional triggers to keep clients informed in real time
- Capture and manage multiple services within one platform
- Run detailed reports to gain operational insight

The system provides a central platform for capturing data, automating workflows and supporting day-to-day activity.

## THE RESULT

Since implementing pro-Forms®, Paterson Safety Anchors Ltd has transformed how it manages its operations. Administrative time has reduced through automated reporting and the removal of manual processes.

Engineers can complete forms on-site, with reports generated and sent instantly, keeping clients informed without additional admin. The ability to run detailed reports has also provided valuable insight into workload and performance.

Today, pro-Forms® sits at the centre of the business, supporting around 90% of operations and providing a scalable, flexible platform that continues to evolve with their needs.

## CUSTOMER COMMENT

“

Pro-Forms® has become an integral part of our business. Around 90% of what we do now runs through the system.

The ability to automatically generate and send PDF reports from site has saved a huge amount of admin time and the reporting tools have given us insights we never had before. It's completely changed how we operate.

The team are outstanding, always helpful, constantly improving the system and genuinely focused on finding solutions.”

”

— Robert P Paterson, Director,  
PATERSON SAFETY ANCHORS LTD