

# Formsort








by CTO

Form Builder

## Details

Review Date	07/08/2024
Purchase Date	Q4'23
Implementation Time	< 1 week
Product Still in Use	Yes
Purchase Amount	N/A
Intent to Renew	99%
Review Source	Vendor

## Product Rating

Product Overall	 5.0
Use Case Fit	 5.0
Ease of Use	 5.0
API	 5.0
Integrations	 5.0
Support	 5.0
Value	 5.0

## About the Reviewer

Purchasing Team Implementation Team  
Product Oversight

## Reviewer Organization

N/A

## Reviewer Tech Stack

N/A

## Other Products Considered

Feathery intakeQ / practiceQ JotForm  
Typeform

## Summary

- **Product Usage:** The reviewer uses Formsort for managing patient applications, collecting insurance information, facilitating clinical intake processes, and conducting A/B testing on form variations.
- **Strengths:** Formsort's HIPAA compliance, aesthetics, user-friendly interface, excellent integration with various platforms, form customization, and flexibility are its main strengths.
- **Weaknesses:** The reviewer noted that Formsort's cost, which is higher than competitors, as its main weakness.
- **Overall Judgment:** The reviewer is highly satisfied with Formsort, praising its comprehensive feature set, exceptional performance, and responsive support team despite it being more expensive than its competitors.

## Review

### **Today, we're chatting about Formsort and how it's used at your company. Before we begin, could you give a brief overview of the company and your role there?**

We operate a virtual telehealth platform for headache and migraine patients, partnering with clinics to serve active patients. As a cofounder and CTO, my responsibilities encompass software development, IT, support, and various other tasks, including assisting with fundraising initiatives.

### **What was the need that led you to purchase a product like Formsort?**

Creating a custom form builder from scratch is an inefficient use of engineering resources since form building is a solved problem. We were looking for a HIPAA-compliant form builder that offered no-code options so our team could focus our efforts on the more essential features of our software platform.

### **What criteria did you use to evaluate Formsort and its competitors?**

Our primary criterion was HIPAA compliance. Once that was established, functionality and cost were important but secondary considerations. Functionality includes aesthetically pleasing design, usability for form creators and end-users, and the ability to integrate well with our back end to ensure seamless data extraction. Those were the key factors beyond compliance and cost.

### **Were there other vendors that you evaluated, and how did they compare to Formsort?**

We evaluated several vendors, including Feathery, Jotform, Formstack, IntakeQ, FormDr, and Typeform, before deciding on Formsort, even though it was one of the more expensive options. Our initial choice of Formsort was influenced by its integration with Awell, a workflow management software we were using. We ultimately ended up not using Awell, which might have led me to select a less expensive solution initially. However, my experience with Formsort has been extremely positive. Its form quality, customization options, and seamless no-code integration capabilities with Google platforms, such as Analytics, Tag Manager, and Sheets, along with its compliance features, make it a great fit for our needs.

### **How did you find the sales process?**

The sales process was straightforward. We interacted mainly with the technical founder who also handled sales. It was a pleasant experience.

### **How was the onboarding process?**

The onboarding process was smooth and easy. I may have interacted with their support team once, but nothing significant stands out, which I take as a positive sign. Generally, you remember the onboarding process if it was problematic, and since I don't have any memories of it, it was likely a good experience.

### **What are your use cases for Formsort?**

Our primary use case is managing patient applications to ensure we're serving the right people. Since our startup is at an early stage and bootstrapped, we're currently operating in just one state, with plans to expand after raising more funds. Formsort's initial role was to help filter our patient cohorts due to these geographic limitations. However, its utility grew to include patient consent forms, insurance information collection, and clinical intake processes.

Formsort offered specific features tailored for the healthcare industry, which made it stand out compared to general-purpose form builders like Typeform or Jotform. We now use Formsort for various assessments, with probably around 30 or 40 different forms in play. An unexpected benefit we've realized is the platform's capability for A/B testing form variations, which helps us optimize conversion rates.

### **What are the features that you're using that really stand out, particularly in a healthcare context?**

HIPAA compliance is fundamental in our system; without it, we wouldn't be able to build our solutions. We've developed a versatile form builder capable of handling complex tasks like medication history. Users can effortlessly add multiple items to their medication list, which is particularly useful for those with extensive histories.

Testing different form layouts through A/B testing has been useful for patient application forms. We are constantly optimizing to improve form completion rates, experimenting with both single-question and grouped-question formats.

And Formsort's integration capabilities allow us to connect with services like Google and PostgreSQL. Additionally, webhook notifications are essential, as they alert our system when a form is completed so we can act on it promptly.

The customization of form appearance is another feature we heavily utilize. Unlike Typeform, which has limitations, our designers have almost complete control over the form's CSS, so we can align it closely with our branding.

Finally, conditional logic is huge for us. It streamlines the user experience by allowing answers to key questions to determine which additional questions need to be answered or if they can be skipped.

### **How would you characterize the strengths and weaknesses of Formsort?**

Formsort's strengths lie in its features, such as integrations, conditional logic, and custom domains. The custom domains are a highlight, ensuring that there's always a single place the user can go to update their information. As for weaknesses, the primary concern is the cost, which is higher than competitors. Beyond that, I haven't identified any significant issues or weaknesses.

### **Have you found the platform to be pretty bug free, reliable, and stable?**

The platform has been generally reliable, with only two issues in the past six to seven months. One involved a third-party authorization platform that prevented login for less than a day, but there were workarounds. The other was a temporary CSS issue, which their support team resolved quickly. Overall, I'd rate it 9 out of 10 for stability, which is excellent compared to other vendors I've worked with.

### **How would you characterize the overall developer experience?**

Integration and building on a platform have many facets, including no-code integrations, webhooks, and direct API usage. The no-code aspect is straightforward, allowing simple integrations with tools like Google Analytics and PostgreSQL without any hassle. Their webhooks and database connectivity were also easy to implement, and they had comprehensive documentation that I would rate as 9 out of 10. It provided all the answers I needed.

The direct API experience is particularly impressive, especially when it comes to creating print versions of forms. Using the Formsort API, changes to forms are seamlessly updated in print versions without additional manual intervention. The API doesn't just expose the data; it also reveals the structure of the form, which is essential for generating accurate print copies with consistent formatting. This unique application of the API, which wasn't originally provided by Formsort, demonstrates their powerful and flexible API capabilities.

### **Do you have any tactical build advice for other organizations?**

I've found that by actively exploring and utilizing as many of the available features as possible, up to 80% in my case, the value of the product significantly increases. While only a small percentage of users may engage with direct APIs or webhooks, I recommend diving deeper into the capabilities of the platform. By integrating as many of these features as possible, you can get more value from the solution.

### **How do you feel about Formsort's support and account management?**

The founder is very responsive and willing to have a call when necessary. Their support channels, including email and the website's chat widget, are responsive. We seldom require support, but when we've needed it, they've been quick to respond and resolve our issues.

### **Looking back, do you feel like you made the right decision in going with Formsort?**

Absolutely, choosing Formsort was the right decision. Despite our initial assessment based on tech we eventually didn't use, the outcome has been incredibly positive. Features like their API and print-friendly versions stand out—they're not something I could have easily achieved with the other form builder platforms we considered. It was a fortunate turn of events for us, but it was the best possible outcome we could have had when it came to selecting a form builder vendor.

### **Do you have any advice for Formsort about areas for growth?**

One area for improvement could be the ability to alter the slug for a form after it's been created. Currently, you have to duplicate the form to create a new slug. Additionally, enhanced analytics would be beneficial. Right now, if you modify a form, the analytics reset, making it challenging to track historical data on form completions and progression through various steps. Those are the main enhancements I would suggest.

### **Do you have any advice for buyers who are looking for a form builder?**

Don't be overly swayed by cost alone. While Formsort may be more expensive than competitors, the time and resources it saves can make it a valuable choice. It enables the implementation of features that might otherwise be sacrificed. The hidden value of selecting Formsort, such as opportunity costs, often outweighs the initial price of the product.