

Formsort

by Product Manager

Form Builder

Details

Review Date	09/26/2023
Purchase Date	Q2'22
Implementation Time	2-3 weeks
Product Still in Use	Yes
Purchase Amount	\$279 per month, up to 1,000 users who start a form
Intent to Renew	90%
Review Source	Elion

Product Rating

Product Overall		4.5
Use Case Fit		4.5
Ease of Use		3.0
API		4.0
Integrations		4.0
Support		4.5
Value		4.0

About the Reviewer

- Purchasing Team
- User
- Implementation Team
- Product Oversight

Reviewer Organization

- Specialty Practice
- Behavioral Health

Reviewer Tech Stack

N/A

Other Products Considered

- JotForm
- Paperform
- Typeform

Summary

- Product Usage:** Formsort is used for patient and provider intake and onboarding, leveraging its branching logic and customization features.
- Strengths:** The strengths of Formsort include the high level of branding and design control, strong customization capabilities, and efficient handling of complex branching logic.
- Weaknesses:** A detriment to Formsort is its relatively complicated user interface and setup compared to more user-friendly alternatives.
- Overall Judgment:** Despite its complexity, the user recommends Formsort due to its flexibility, customization options, and performance in increasing conversion rates.

Review

So today we're chatting about Formsort and how it's used at your company. Before we jump into that, could you give a brief overview of the company and your role there?

So our company specializes in providing behavioral health care. We connect patients with therapists and develop tools to train them. We bill insurance, fee for service. In my role, I handle design, some ops functions, and growth.

What was the need that drove you to look for Formsort?

We realized we had various intake and onboarding needs for both patients and providers. We decided that we didn't need to allocate our own software engineers' time to address this, we could save time by using an existing form builder product and iterate on it more quickly. That's when we discovered Formsort.

What were the key requirements you were looking for?

First, we wanted to be able to brand it and own the brand. Another important factor was the level of customization we could achieve. We also wanted the option to sign BAAs and ensure a HIPAA-compliant offering. And we also considered the overall end-user experience for those using the form.

What other vendors did you look at besides Formsort, and how did they compare?

We started with Paperform, then moved on to Typeform. After that, we experimented with our own form, and we finally tried Formsort. We tried them all, built out our onboarding experience on each one, and measured the conversion rates. Ultimately, Formsort showed the highest increase in conversions compared to the other options. The main advantage of Formsort was the ability to fully customize and brand the form according to our preferences. The end-user experience on both desktop and mobile was cleaner, which we believe contributed to the higher conversion rates.

We also conducted a Google Optimize experiment with all the form builders, and Formsort showed the best conversion rates. Formsort offered more flexibility compared to Typeform, particularly in terms of changing the design and layout of the text inputs and the flow of the form. We had more freedom to optimize with Formsort.

How did the pricing compare between them?

I think Formsort was a little bit more expensive. I remember Paperform starting at around \$100 per month, while Typeform was similar, maybe around \$170 or \$200 per month if you wanted analytics. Jotform was probably a bit cheaper. They all had similar pricing structures. I believe Formsort had a higher pricing tier for HIPAA compliance, although I'm not sure about the exact amount. But in the end, what really made a difference for us was the conversion lift rather than the pricing.

How was the sales process with Formsort?

It went pretty well. When we first started using it, they allowed people to sign up and use it online on their own. So we just started building out the form. I think there was a free trial period. I stayed in contact with them as I tested it, and the founders were actually very involved in answering my questions. We had a long thread of about 40 emails where they provided specific feedback on the form's strategy. They even suggested adding reinforcing messages between

steps, as they had seen other customers experience higher conversion rates with this approach. I really appreciated their consultative approach and their willingness to help build the best form possible.

How did you find the setup and onboarding process?

Formsort is more complicated than just setting up Typeform, for example. It offers a greater level of customization and allows more granular control over the form details. This can be challenging for someone with less experience using no-code tools. While no technical ability is required, Formsort allows you to do more advanced tasks, such as triggering an API call when a step in the form is completed. You can even include custom code that executes at different steps.

For instance, we had a specific requirement where we had a list of regions in which we provided services. After completing that step, we utilized an AWS lambda server to check if the input region was among the valid regions in an array. Based on the result, we implemented branching logic to direct users accordingly.

What use cases do you use Formsort for?

Basically, we use Formsort for patient intake and onboarding, as well as provider onboarding. There are multiple steps involved in the process. We've done a lot of optimizations, such as creating different variations of forms to experiment with question order and prioritize certain questions. Formsort makes it easy to do that. We've also used branching logic a lot, which Formsort supports. For example, we needed to determine someone's eligibility based on factors like location, medical diagnosis, and insurance coverage. Formsort handled this complex logic well, allowing us to offer different options based on someone's qualification level. Other tools we've used in the past didn't handle conditional logic as smoothly as Formsort. We didn't initially think about the flexibility and elegance that Formsort brings to this branching logic, but now we appreciate it after working with other less efficient solutions.

Can you talk about some of the strengths and weaknesses that you've found with Formsort?

Top strengths: complete ownership of branding and design, high level of customizability.

Weaknesses: time-consuming to create end-to-end flow compared to more user-friendly alternatives like Typeform.

I think Formsort is fairly complicated. I don't mean that as a positive trait. It's not something that most people on my team could very easily implement with high fidelity. It requires someone with a thoughtful approach to user experience, whereas Typeform can be used by anyone. Additionally, Formsort has many customization options, which can make the user interface complicated.

How are the stability, reliability, and performance of the platform?

Overall, it's been solid. Whenever we encountered a challenge, I would just send an email. They offer live chat support, or I could email one of the founders directly. They were quick to respond and usually resolved the issue within 48 hours. So I was quite satisfied with the level of support they provided.

How are their APIs?

We have URL redirects set up on our marketing website. When a form is submitted, the information is sent to Slack and our CRM, and the user is redirected to a specific page based on their responses. We also have integrations with Google Analytics, Amplitude, and Zapier.

There are different steps involved in form submission, and we can trigger specific code blocks to run. We mainly use this functionality to check eligibility or qualification at different stages of the form submission process. It has worked well and met our expectations. Other form platforms like Typeform, Paperform, and Jotform didn't provide this level of flexibility.

Formsort offers a lot of built-in logic and conditional branching. Ideally, everything can be done within Formsort's environment. However, if there is a need to check the eligibility of a zip code, it's easier for us to make an API call to an AWS lambda function. Overall, I would recommend staying within the Formsort platform to minimize complexity if possible.

How are their out-of-the-box integrations?

Some that come to mind are Zapier, Google Sheets, Amplitude, and Google Analytics. We were able to pipe data from Zapier to Slack and our CRM, and overall everything worked as expected. However, I think the integration with Amplitude could be improved. I remember it being on the roadmap, but I'm not sure where it stands now. Apart from that, the integrations were pretty straightforward.

As far as Amplitude, the idea was to connect a user's actions in a form to their Amplitude user ID. This way, we could gather specific information about that user. Initially, it was challenging to link a Formsort user to a specific Amplitude user ID. There seemed to be issues with the synchronization between the two systems.

How do you feel about their account management and support?

Actually, I feel pretty good about it. They had a live chat support engineer who was really responsive and smart. They helped us troubleshoot and debug any issues that came up. And the founders were really involved too. They gave us feedback on our overall strategy, went through our flows with us, and provided consulting. They even suggested new experiments to try and gave ideas on how to improve conversion. When we mentioned the Amplitude thing, they actually included it in their roadmap. Overall, I'd say that was one of the best aspects of the experience. You could tell they were working hard to be your partner.

Do you feel like you made the right decision going with Formsort?

I do. I've continued to recommend it to other friends in healthcare.

Do you see any potential growth areas for Formsort?

I would say the Amplitude integration is one area. They also seem to have included some features that weren't really necessary and could have focused on polishing a smaller set of features. So while they're doing a lot overall, there is an opportunity for them to refine their approach and concentrate on a smaller set of functions.

Do you have any advice for buyers who are trying to make a decision around a forms product?

Yeah, I think if there's a free or self-serve product available, it's worth trying out. Use it to actually build your form to see if you like it and if it allows you to move quickly. If you reach a point where conversion is crucial for your flow, then run an experiment comparing Formsort with another option to see which one has a higher conversion rate for you.

The main idea here is that, if speed is your priority, Typeform might be the better choice. However, if optimizing conversion is essential and you value owning the branding and design, we have found Formsort to be better for those reasons.