

# Formsort








by Chief Product Officer

Form Builder

## Details

Review Date	05/08/2024
Purchase Date	Q3'23
Implementation Time	4-6 weeks
Product Still in Use	Yes
Purchase Amount	Annual BAA plan
Intent to Renew	100%
Review Source	Vendor

## Product Rating

Product Overall		4.5
Use Case Fit		4.0
Ease of Use		4.0
API		4.0
Integrations		4.0
Support		5.0
Value		4.0

## About the Reviewer

N/A

## Reviewer Organization

N/A

## Reviewer Tech Stack

N/A

## Other Products Considered

N/A

## Summary

- **Product Usage:** Formsort is used to manage a vast library of patient engagement questions, streamline assessments, and capture both complete and partially completed responses in an efficient, user-friendly manner.
- **Strengths:** The strength of Formsort lies in its no-code environment, conditional logic, webhooks, customization capabilities, and new content library features, as well as customer support responsiveness.
- **Weaknesses:** Formsort lacks an easy export feature, the ability to create PDF forms, wider ranges of question types, and has occasional reliability issues that need troubleshooting.
- **Overall Judgment:** Despite some technical limitations and occasional glitches, the team deems Formsort as the right choice due to its features and customer support, recommending future users to thoroughly understand their intended use to avoid potential issues.

## 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?**

As the chief product officer, I oversee product and engineering for our SaaS platform, which serves a range of healthcare organizations. We focus on three core functions: enhancing patient engagement, utilizing a large language model to generate draft clinical documents, and providing a user interface for healthcare professionals, like nurses or care managers, to review, edit, and approve these documents. Additionally, our system manages subsequent patient engagement and helps prioritize the workload for nurses and care managers by organizing their patient panels efficiently.

**What was the original business problem that you were looking to solve with Formsort?**

Our primary business challenge was to efficiently manage our vast library of patient engagement questions without investing heavily in development resources. We needed a form builder that would allow both our chief clinical officer and me to create, manage, and update our assessments without any coding. The goal was to find a flexible, no-code solution for fostering patient interaction that avoided the complexities of software development.

**What were the core technical requirements you were using to evaluate products in this space?**

First, we needed the capability to embed the vendor's user interface directly into our application. It was important for us to have a flexible form builder that allowed us to manage and update forms independently. Additionally, being able to capture both complete and partially completed survey responses was essential. Finally, the solution had to support webhooks for integration purposes.

**What other products did you consider, and how did they compare to Formsort?**

We compared Formsort with Formstack and found that Formsort offered greater flexibility. This included how we could embed the user interface into our application and customization options, particularly in terms of conditional logic. A pivotal factor in our decision was the ability to receive partially completed responses. Unlike Formstack, which required full completion for data collection, Formsort allowed us to collect data even if a patient abandoned an assessment after answering only a few questions. This feature enabled us to capture vital patient information without requiring the user to trigger an event, such as clicking the Next button.

**How did the pricing compare between the two?**

Formstack offers a monthly subscription for their HIPAA-compliant forms, but it limits builder user access and caps form creation at 20 forms, at least for our pricing bundle. The base package is roughly half the price, but it also restricts the number of users, forms, and submissions per form. In contrast, Formsort charges a flat annual fee without these constraints, which is why I chose them. I needed to create a large number of forms without limitations on submissions or user access.

**How would you characterize the sales and onboarding process for Formsort?**

The sales process was easy and straightforward. I worked closely with one of their cofounders to understand our use case and later discussed technical challenges with their other cofounder during implementation. Both were collaborative and solutions-oriented. They provided early access to features in a sandbox environment, significantly easing implementation. Furthermore, Formsort customized a template to match our branding, saving us additional work. Their responsive customer support, often replying within the same business day through chat, facilitated the implementation process efficiently without the need for phone calls.

**What are the specific use cases that Formsort is supporting for your company today?**

Providers select relevant assessments from a hundred options for their patients in our in-house platform. Our system arranges these assessments, and patients receive a link via SMS or email to complete them using Formsort's interface. Depending on the level of completion, our platform updates the status to alert providers to review the responses. The providers use our platform to view the data and generate documents. We also use Formsort for follow-up patient questions. The entire process is white-labeled, so patient interactions occur within our customized platform, maintaining a consistent patient experience.

**What features of Formsort are you using, and can you describe any strengths versus weaknesses?**

We utilize Formsort's flows to organize a unique assessment and variants to customize them for individual clients. For example, if a client wants to modify a templated assessment flow, we create a variant tailored to their requirements. I oversee these customizations and ensure they're tested before deployment.

Additionally, we heavily employ Formsort's conditional logic, redirects, webhooks, customized themes, and their new content library, which has been quite helpful for quickly uploading questionnaires based on clinical team input.

A noticeable limitation is the absence of a feature allowing easy export of assessments into a clinician-friendly format like PDF or Word documents. Although we've adapted by teaching our chief clinical officer to create forms within Formsort for review with our clinical advisory board, we've had to find workarounds, since it is our source of truth for content but lacks the capability of convenient exporting. Additionally, they do not have a capability to build out PDF forms which would have been helpful for our use case.

**Are there any other areas where you feel like the product has some room for improvement?**

One area would be expanding the types of questions available in the product. Currently, they offer signature functionality but lack a freeform drawing option, which would be useful for tasks like having patients draw a clock while filling out the form on their phone. It's not essential for our operations, but having this feature would save us the time and effort of developing it ourselves and integrating it into their platform. Additionally, we've encountered challenges because we use the tool differently than other customers. This has required more development work on our part to create smooth workflows and necessitated collaboration with Formsort's team for insights. It would be beneficial if such functionality was more readily available straight from the product.

**What do you see as the main strengths of Formsort?**

Building forms in a no-code environment is incredibly user-friendly. It's usable by individuals without a product or technical background after an initial learning period. Our third-party vendor has been very collaborative, always ready to assist and generate ideas. This has allowed us to have considerable flexibility in creating a patient experience that is unique to our use case, a bit different than the way typical customers use the tool.

**How reliable has the platform been?**

It's reliable overall, though I occasionally encounter glitches when creating forms or while copying and pasting. These issues require some troubleshooting, but they haven't been deal-breakers in my experience using it.

**How are you using their APIs?**

We're fully integrating their APIs to create the desired user experience. For instance, when a nurse selects multiple assessments, Formsor's API enables the seamless combination of these assessments into a single instance. Formsor has substantial documentation, which facilitates the development of a proof of concept for embedding the API into our application. Furthermore, their APIs are instrumental in data transfer; they temporarily store data for only about two days, but we use the APIs to transfer and store the data within our data repositories. Those are the main APIs we use.

**How would you describe the developer and documentation experience?**

Overall, we had a positive experience. After the discovery phase, you expect certain capabilities, but the real challenges emerge during development. There have been obstacles that proved more challenging than anticipated. Despite that, our developers would agree that the experience has been largely positive.

**Do you think the team made the right decision to move forward with Formsor?**

I do, yes.

**Do you have any advice for other buyers who might be looking into this category of products?**

It's important to understand your intended use early in the decision-making process. For instance, we applied the tool in an unconventional way and faced technical limitations. Knowing these limitations beforehand would have allowed us to ask more informed questions during our due diligence. These issues came to light only as we approached implementation. It's essential to thoroughly consider the technical aspects of a tool before committing to it.

**Knowing what you know now, what would that have changed in your initial assessment or in your implementation of the solution?**

I believe if we had delved deeper into the technical specifics with Formsor before signing the contract we could have better aligned our expectations. This would have also improved our project planning timeline. Ultimately, we required one or two more sprints than had been budgeted for to complete our work due to the technical limitations encountered with the way we intended to use the tool.