Formsort

by Product Manager

Form Builder

Details

Review Date	08/29/2023
Purchase Date	Q2'23
Implementation Time	1 week
Product Still in Use	Yes
Purchase Amount	N/A
Intent to Renew	85%
Review Source	Elion

Product Rating

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

About the Reviewer

Purchasing Team   Product Oversight

Reviewer Organization

Primary Care Clinic   Primary Care

Metabolic Health   Cardiology

Reviewer Tech Stack

Segment   Google Sheets   Customer.io

AWS S3

Other Products Considered

Feathery   JotForm   Typeform

Summary

- **Product Usage: Formsort serves as the primary tool for patient intake processes, handling detailed questionnaires and surveys, and collecting lead forms on the company's website.**

- **Strengths: Formsort boasts robust customer support and extensive customization options, allowing for granular adjustments and alignment with the company's branding and UX guidelines.**

- **Weaknesses: Formsort can be overwhelming for those without design experience and lacks full service in certain functionalities like RudderStack identification and full-featured Stripe integration.**

- **Overall Judgment: The platform is instrumental for the company, both for current functions and future growth, with high potential in conversion rate optimization due to its key features.**

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

Our company was founded in 2020 and we were in the diagnostics business from fall of 2020 until around February 2023, when we decided to shift gears. Our focus now is on operating a preventative health-focused clinic. Currently, we have an in-person office with plans to expand digitally and potentially open clinics in other cities. I'm the product manager, and at the moment, we are in the early stages of developing our program and tech stack.

How long have you been using Formsort?

We bought the product in April 2023 for a specific business purpose, but we ended up not pursuing that avenue anymore. But once we activated this clinic, we started using it again for our patient intake process. We have two detailed patient intake questionnaires, and we have planned shorter surveys that patients will receive throughout their three-month program. And then we have a simple form on our website to capture leads of people who are interested in obtaining more information about the program.

What was the specific problem that you were trying to solve that made you look into purchasing this type of product?

Yeah, so we used Jotform as our main form builder for our diagnostics business, but I wasn't too happy with it, and we actually switched to having a development team create custom forms for us, but that was a bit of a hassle. Making changes to those forms was slow, they didn't look great, and there were always bugs that needed fixing. I knew that a form builder would be an important part of our tech stack in the future, but I wasn't satisfied with either of these previous options. So I started casually exploring the different options on the market. Looking for a new form builder wasn't really an effort to solve an immediate need, but more of a proactive step to start building our stack for the future.

I found Formsort and was intrigued by their healthcare focus, design flexibility and the engineering-oriented nature of the product. The ability to create fully branded embedded flows was also a major attraction. From looking at other D2C health brands I saw this sort of flow repeatedly following the major on-site CTA, as an intake flow to screen patients for eligibility and get them to sign up. I was able to look at some Formsort's customers and their case studies and their strength for this use was immediately apparent.

One painful experience we had with Jotform was collecting signatures on our consent forms for our tests. We needed to keep these signatures for legal record-keeping purposes. However, when we wanted to migrate away from Jotform, extracting those signatures proved to be a daunting task. While text data could be exported easily through CSV or spreadsheet exports, the actual image signatures were much more challenging. We had to split the process into several exports, resulting in numerous errors along the way. One thing I really appreciated about Formsort was its requirement to use external data storage in a neutral cloud provider like Google or Amazon Storage. This approach avoids creating a data silo and allows for easy migration if necessary.

What were some of the criteria you used when you were evaluating Formsort and other competitors?

Yeah, I would say white labeling, both in the ability to use custom domains/embed and in full design flexibilitywas definitely one. Another important factor was HIPAA compliance. Of course, cost was also a consideration. I compared it to enterprise plans like Typeform or Jotform, which offered custom domains.

Integrations with data connectors like Segment/Rudderstack were also an important consideration.

What other vendors did you compare Formsort to?

We didn't evaluate Typeform extensively. We had a bad experience with them about a year ago when they charged us after we canceled the trial, so that left us with a negative impression. We also inquired about their enterprise pricing, which was required for HIPAA compliance and the BAA, and it was around $20-30K. This was a lot more compared to Formsort.

Another vendor we considered was Feathery. It was a finalist because it was similar to Formsort in terms of being a small team and offering high customization options for the layout. They also had integrations with tools like Segment. I gave it a try, but I found it a bit challenging to use. I found it much easier to pick up Formsort. Feathery had so many options for customization in their builder that it almost became overwhelming, especially for someone with little front-end experience. In contrast, Formsort felt intuitive right from the start.

So why did you go with Formsort over competitors?

White labeling was important. Additionally, their integration with Segment and RudderStack was beneficial for extracting data for analytics and transferring it to our lifecycle marketing tools. The webhook integrations were also useful. Moreover, during sales calls and interactions with various team members, I enjoyed the fact that they were a smaller team, with only around a dozen employees. This gave a more personal and white-glove service experience, which has consistently been upheld. I definitely value this aspect of their service.

How did you find the overall sales process?

I think, overall, the experience was positive. I had a few meetings with the co-founder and also chatted with one of their support engineers on their web chat. During this time, we were trying out their product through a free trial and continuing to communicate with the team. The sales process was good, as they weren't pushy at all and took the time to answer technical questions thoroughly. They were also very responsive in their communication.

How was the onboarding process?

That was also pretty good. We had a dedicated onboarding manager who was very helpful. She even went above and beyond by building out some custom themes for us, using the guidelines we provided. She also assisted us with coding for some custom variables. Overall, the onboarding process was strong, a good sales process overall.

What specific use cases do you have with Formsort?

So, there are three main categories of use cases. The first one is collecting data from patients, specifically their medical history and subjective assessments. This category is the one we have been using for all of our patients so far. The second use case is converting site visitors into patients. Currently, we have a simple form on our website for this purpose. However, most of our patients have been referred to us by others, so only a few have actually used the online form. In the future, we plan to make this process more complex with eligibility screening and multiple steps. The

third use case involves conducting ongoing surveys to gather feedback from patients about their experience with the program and their ratings of specific aspects of it.

What are some of the relative strengths and weaknesses of Formsort?

At a high level the overall UX of the "studio", which is their CMS for building forms, is really powerful and intuitive. The structural hierarchy of "groups" and "steps" makes it really easy to keep your work organized and work efficiently on long forms by breaking them up into smaller containers. A step is displayed as a single page, so using this structuring helps encourage a more user-friendly form where each page has a single question, or a few questions. This minimizes scrolling and makes the form more conversational and easier to fill out.

Another great aspect of the studio is the ease with which you can cut or copy questions, steps or groups into different parts of the same flow or into a different flow. This really speeds up the creation process and minimizes chances for error. For example, we have a questionnaire with a section that has eight steps with eight unique but similarly structured questions (64 total), and being able to copy and paste the first step seven times, with slight variable name changes, saved us a lot of time.

Some other high-level strengths of the platform are definitely its support and documentation. The support team is very responsive and knowledgeable, especially when it comes to technical questions. The documentation is also well written and thorough, providing good examples to demonstrate the concepts.

Another general strength is flexibility. The platform as a whole is extremely flexible, allowing us to find creative solutions to any challenges we come across. I really appreciate how they give us the ability to customize every aspect of the theme design. However, it can be overwhelming if you're not a designer, as it requires some knowledge and expertise to fully utilize its potential. You have control over things like headings, margins, drop downs, and even corners. This level of customization allows you to align it perfectly with your branding and UX guidelines, but it can also be a bit overwhelming.

You can tell that it's primarily a data engineering-focused product with some API capabilities. I know they have support for custom questions that can be embedded using code, although I haven't used that feature yet. One aspect we have utilized is the ability to create calculated variables. This allows you to use a JavaScript function to calculate a new variable based on existing ones. It has been very useful in several scenarios.

There was actually one instance where the default question type didn't meet my needs. Unfortunately, the platform didn't support the feature that I needed directly. However, I found a workaround by creating a series of questions and then using a calculated variable function on the back end to consolidate the responses into an object. This object is then included in one of the reports for our provider to review. That's an example of something that wasn't supported out of the box, like the ability to repeat groups of questions. However, I found a workaround by utilizing the custom variable functionality.

Additionally, they do support externally provided variables, which have been quite helpful. These variables can be passed through URL parameters or by using an API call. The externally provided variables come in handy when including certain parameters in email links. This way, I can map it to the user ID for Segment and ensure the correct identify call is made. It saves us from having to ask for identifying information from someone who already provided it, which would obviously be annoying. This makes the whole process more seamless—we can simply send them the questions, and all the identification is handled in the background without any inconvenience.

Some other useful features are the separate production and staging environments, which is helpful for testing new flows without contaminating your production data. The preview is also great, it lets you view your flow across a variety of screen configurations and updates in real time as you make changes to the flow in the studio. So basically you can keep it open in a separate window and it will stay in sync. Definitely helps contribute to the quick editing process.

Do you find the platform to be reliable and relatively bug free?

In the few months that we've been using it, we've encountered a few bugs, maybe three or four. Fortunately, they were usually fixed promptly. Most of the issues were related to the studio side and didn't affect the end user experience. None of the bugs were major enough to disrupt our production flows. They were just minor glitches here and there, but the team was able to address them efficiently.

What integrations do you use with Formsort?

I really like the Segment integration. There are about five or six different events that you can track, such as loading a flow, completing a step within a flow, and finalizing/completing a flow. This provides detailed event data for everything you need. I send the data to Mixpanel to analyze conversion rates (step by step within flows, or across variants for A/B tests) on the flows as well as to Customer.io to trigger different messages and update attributes. You can also control individually which responder answers are sent in the event payload. This is useful for minimizing PHI footprint and minimizing data clutter in destinations. Overall, the Segment integration is really strong.

On the other hand, the RudderStack integration has a limitation right now. They don't properly map the RudderStack identification to the user ID on the Formsort platform. Formsort has predefined data classifications, and you can assign collected variables to these classifications. With Segment, you can designate a variable as the ID, and Segment will use it for their identify call to map it correctly in downstream tools like Customer.io. Unfortunately, RudderStack doesn't have this feature, which is slightly disappointing. Currently, I'm evaluating both Segment and RudderStack on their free versions, and I'm leaning toward RudderStack. However, for now, I'm using Segment, and it's working fine.

For data storage, we started out using the Google Sheets integration since it was easy to set up, but in the meantime I started evaluating the different database/data warehouse integrations to use as a more permanent solution. We don't have any engineers so it was slightly challenging to figure this piece out. I evaluated each of the database/ data warehouse integrations that Formsort offers. I first tried BigQuery but this required their Streaming API and was beyond my abilities. Next I tried the Postgres integration but also hit the limit of my technical abilities. Eventually I was able to connect Redshift as well as Snowflake. Formsort doesn't have a direct Snowflake integration, but instead I used the Formsort webhook as a Fivetran source, which then goes to Snowflake. Between Snowflake and Redshift I'll probably stay with Snowflake since it's a bit more user friendly.

For signature storage, we rely on S3, which is quite important as it ensures that our signatures are not locked into a specific vendor.

Some more useful integrations are the USPS integration and support for the Google Maps API. USPS is used to validate addresses by converting them to standard formats, and the Google Maps API is used for autocompleting addresses, making the process more user-friendly and reducing errors. We don't currently use the USPS integration, but we employ the Google Maps API to enhance our address questions.

We briefly used Stripe, but our current workflows no longer require it. So our main integrations now are Sheets, webhooks, S3, Google Maps API, and Segment. They have a well-curated list of integrations, unlike Jotform who had

hundreds of different integrations and third-party partner plugins, a lot of which had bugs. The shorter list is a lot easier to work with.

Do you feel like you made the correct assessment with Formsort?

Yeah, absolutely. We definitely have a strong intention to renew our subscription. It's going to be a crucial component of our future stack. Despite being a smaller aspect of our current usage, the importance of converting site visitors into patients is going to significantly increase as we grow. Fortunately, it has the right features to do conversion rate optimization of those types of flows, such as testing variants and detailed analytics that you get through Segment.

Are there any areas of growth you see for Formsort?

Yeah, there are a couple of features that I had some issues with. One of them is the RudderStack identification that I mentioned earlier. As for the Stripe integration, I feel like it's not fully developed yet. The widget looks a little weird when embedded, but it seems like Stripe integration isn't a big focus. They actually suggest using a redirect if you want to include Stripe in your setup. They have strong support for redirects, and you can pre-fill URL parameters with the variables you collect. But I personally think that the embedded Stripe option could use some improvement. Also a direct integration with Snowflake would be nice, to eliminate the need for middleware like Fivetran. It's somewhat surprising they have Redshift and BigQuery integrations but not Snowflake given its increasing popularity.

Do you have any advice for buyers who are selecting this type of product right now?

Yeah, I'd suggest starting with the free version and exploring it. I believe the free version includes most of the features found in the paid plans. There might be a few advanced features missing, but it will still give you a good understanding of the builder. Afterward, I recommend going through the documentation. It'll give you a good appreciation of what the capabilities are.