



# Web Forms for Sales and Marketing Teams

Your guide to getting the most  
out of your web form platform



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# 0.0 Intro

We get it. You're stressed. If you're in sales or marketing, there are numerous different and competing priorities that you have to deal with and strategies you have to plan, all while needing to show the ROI of the tactics and tools you're using.

Data collection is a necessity for sales and marketing teams, but it's far from easy. That's where FormAssembly comes in. There are lots of options for data collection solutions out there, but the truth is—you only need one good one.

FormAssembly is a powerful form builder and data collection solution that helps organizations drive quality form conversions and streamline processes. In other words, we're perfect for marketing and sales teams.

In this eBook, we'll cover why sales and marketing teams need a great data collection and form creation solution, and how to make sure your team gets the most out of the software you choose.

*we're perfect  
for marketing  
and sales teams.*





# 1.0

Why do sales  
and marketing  
teams need  
web forms  
for data  
collection?





# 1.1 Marketing

As a marketing professional, customer data helps you in a number of ways. You can leverage the data you collect through web forms to understand your buyers better, give your customers the products and services they want, and create connections that turn strangers into devoted clients. A multi-purpose data collection and form creation solution lets you drive leads through landing pages, collect customer survey responses, add people to your email lists, and more.

All in all, gathering and leveraging data from customers can make you a more effective marketing professional—especially if you’re using the right data collection solution.



## How to use web forms for marketing

- Create eBook download forms that send lead information to Salesforce
- Embed forms in WordPress pages to collect leads, signups, and more
- Grow your email list with a newsletter signup form
- Use FormAssembly forms to sign up webinar registrants
- Include a form on an event landing page
- Bring order to your own marketing projects with a form for marketing requests



## 1.2 Sales

Customer data is and always has been important to salespeople, except now, instead of using Rolodexes and filing cabinets, you use CRMs like Salesforce to store and organize your data.

Having enough information about your prospects and customers doesn't just help you contact them and move them closer to becoming paying customers. It also helps you understand them better, tailor solutions directly to them, and get a grasp on what things they need from you to keep them as customers.

With the tools available to you today, there's no reason not to invest in a more streamlined, high-tech alternative to gathering business cards at tradeshow and conferences.



### How to use web forms for sales

- Gather lead information at events through sleek, Salesforce-connected online forms (Bonus: Use offline data collection abilities for events without reliable internet access)
- Speed customers through the onboarding process with forms that negate or reduce the need for onboarding calls
- Keep in touch with prospects and update their information in your CRM with a form tool that can both prefill forms with Salesforce information and update your CRM with any changes users make



# 1.3 Summary

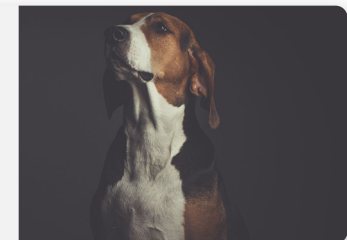
## Why invest in a web form platform?

You're already collecting data in some way, even if it's through email or paper forms. Improve your data collection processes with a sophisticated form solution and experience benefits like:

- Less paper waste
- More streamlined data
- Less time spent on manual data entry (both by you and your customers)

### Web forms in the real world

FormAssembly helped Dharma Merchant Services and Lindamood-Bell School save time and cut down on phone calls and paper forms. We also helped two nonprofit organizations, [Pets for Patriots](#) and [Big Brothers Big Sisters of Metro Atlanta](#), streamline their everyday processes and drastically cut down on manual data entry. Learn more about these companies in our case study archives.





# 2.0

## When data collection goes wrong

Of course, textbook-perfect data collection is a little hard to achieve if you have issues with your collection methods, or if the form solution you're currently using isn't meeting your needs. If any of these situations apply to your marketing or sales team, it might be time to start looking for ways to change and improve the ways you gather information.



## 2.1 What bad data collection looks like

### Antiquated data collection methods

Do you still collect important customer or prospect data on paper? If so, you may be wasting precious time and opening your organization up to problems with lost or incorrect data. Paper forms might be the traditional way to collect a lot of information, but there's no reason to stick with it just because it's always been done that way.

Collecting information on paper (such as business cards at a tradeshow) simply isn't reliable. It can result in duplication of work, makes it more likely for information to get lost, and makes it more difficult to follow through with certain projects.

Paper isn't the only inefficient way to collect data. If you gather information through email, consider whether the same questions you're asking through this medium could be codified, streamlined, and recreated in a form.

FormAssembly's own marketing team overcame disorganization in terms of marketing requests with an internal form. Employees from other departments use this form to make marketing requests. The new process helped to reduce back-and-forth on projects and improved follow-through and speed on requests.

### Marketing Tip

Create a form to handle internal marketing requests for campaigns, deliverables, and more. This helps bring order to your marketing tasks by keeping all requests in one location.





## Too many data collection methods

There are countless plugins, survey tools, landing page creators, and other apps that collect data, but more isn't better when it comes to data collection.

Too many points of data collection means more processes to manage. It can also make it hard to get a full picture of the data you have. Having too many data collection tools also adds extra work and frustration for IT professionals whose job it is to make sure that all incoming data is being collected, stored, and used responsibly.

### Web forms in the real world

Does your organization need to cut back on extraneous tools and applications? Adam Skoczylas, Project Manager for the Center for Educational Outreach at the University of Michigan, shared how FormAssembly was an all-in-one solution.

"We have institutional access to Google Forms, we have access to Qualtrics, but none of these are flexible enough to meet the number of use cases we put into these tools," Skoczylas said.

Head over to our case studies to read more about how FormAssembly helped the [University of Michigan](#) streamline their data collection methods into one powerful system.

## Wasted time

Here's a statistic to think about: Four hours of a salesperson's week is spent updating CRM records ([Esna](#)). That's 48 minutes per workday. Is it too much? Maybe you don't think so, but consider this: Isn't any time spent doing tasks that takes you away from your core responsibilities (in this case, selling) a poor use of time?

### Web forms in the real world

We've helped individuals across all industries regain valuable time throughout their workday. [Baltimore Corps](#) was able to save one to two hours of review time per application received for their fellowship program. Read up on the specifics of the organization's increased productivity and efficiency in the Baltimore Corps case study.





## Over-reliance on IT

These days, marketers have to be specialists in more than just one area. Full-stack professionals in today's world need to be able to craft compelling copy, throw together a sleek professional landing page, pull together a unique strategy, and accomplish anything else their job may throw at them.

When there are tasks like web form creation that only IT has the keys to, this can complicate a marketer's job. When you can't wait on IT any longer, it's time to find a way to create the forms you need by yourself. Instead of trying to add "master developer" to the list of roles you fill, look for a web form creation and data collection solution like FormAssembly that allows users to put together complex forms without help from IT.

In addition to simplifying the process of creating and updating web forms with a user-friendly form creation tool, you can eliminate organizational bottlenecks and keep your data more organized by:

- Finding a form solution with integrations that can allow smooth transfer of data from one system to another so you don't have to wait on data entry. For example, FormAssembly offers web-to-anything functionality with our Salesforce Connector.
- Creating lead forms, event signup forms, and more with one data collection tool.

### Marketing & sales empowerment tip:

Use smart tools like FormAssembly to accomplish form creation tasks yourself, without having to rely on your IT team.



## 2.2 Summary

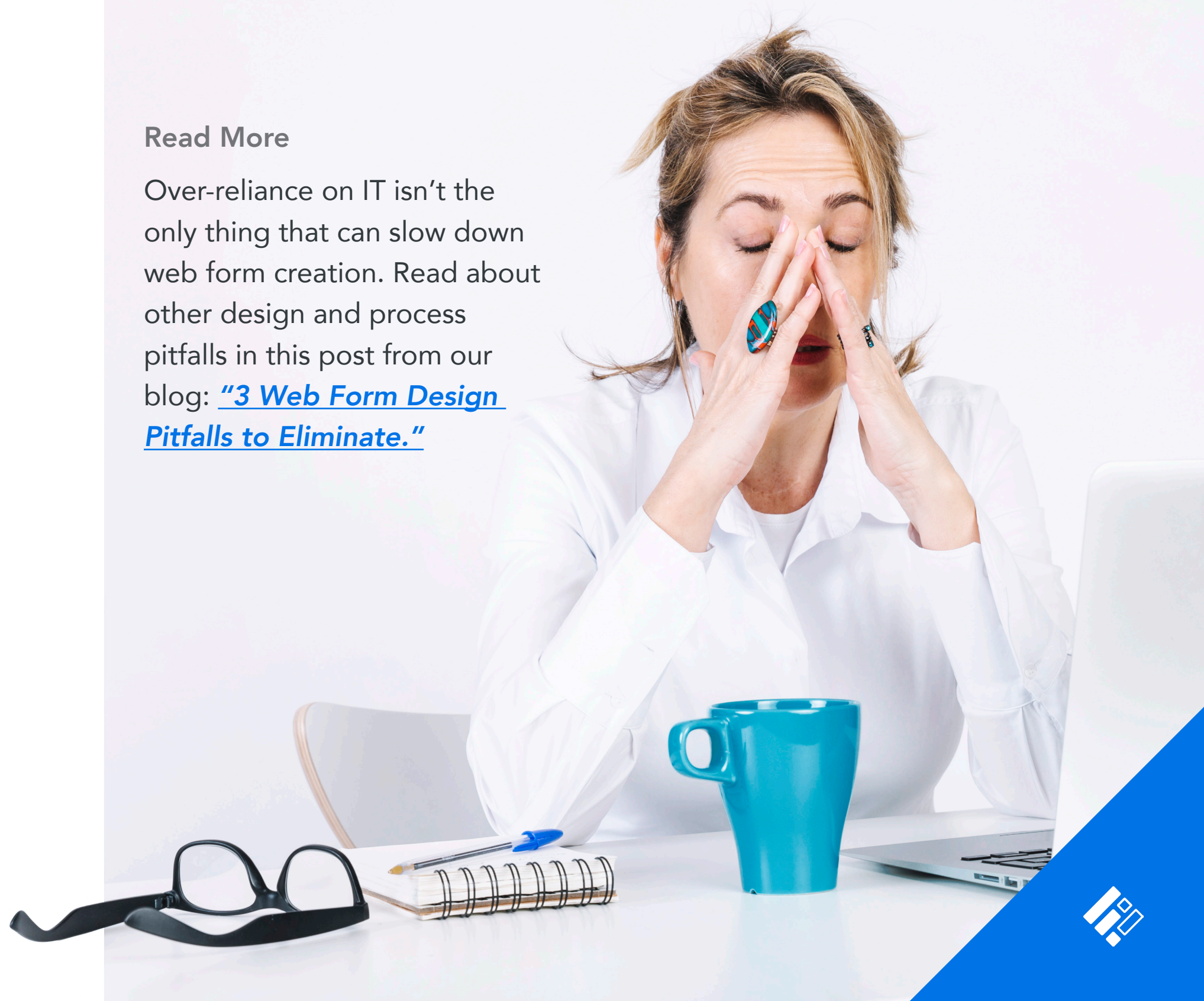
### Data collection problems

These frustrations can have some pretty negative effects on your organization's productivity level and other areas. Some of the downsides to a broken, ineffective way of collecting and managing data you might see are:

- Wasted time, resources, money
- Lost or unused information
- Poor data governance

### Read More

Over-reliance on IT isn't the only thing that can slow down web form creation. Read about other design and process pitfalls in this post from our blog: ["3 Web Form Design Pitfalls to Eliminate."](#)

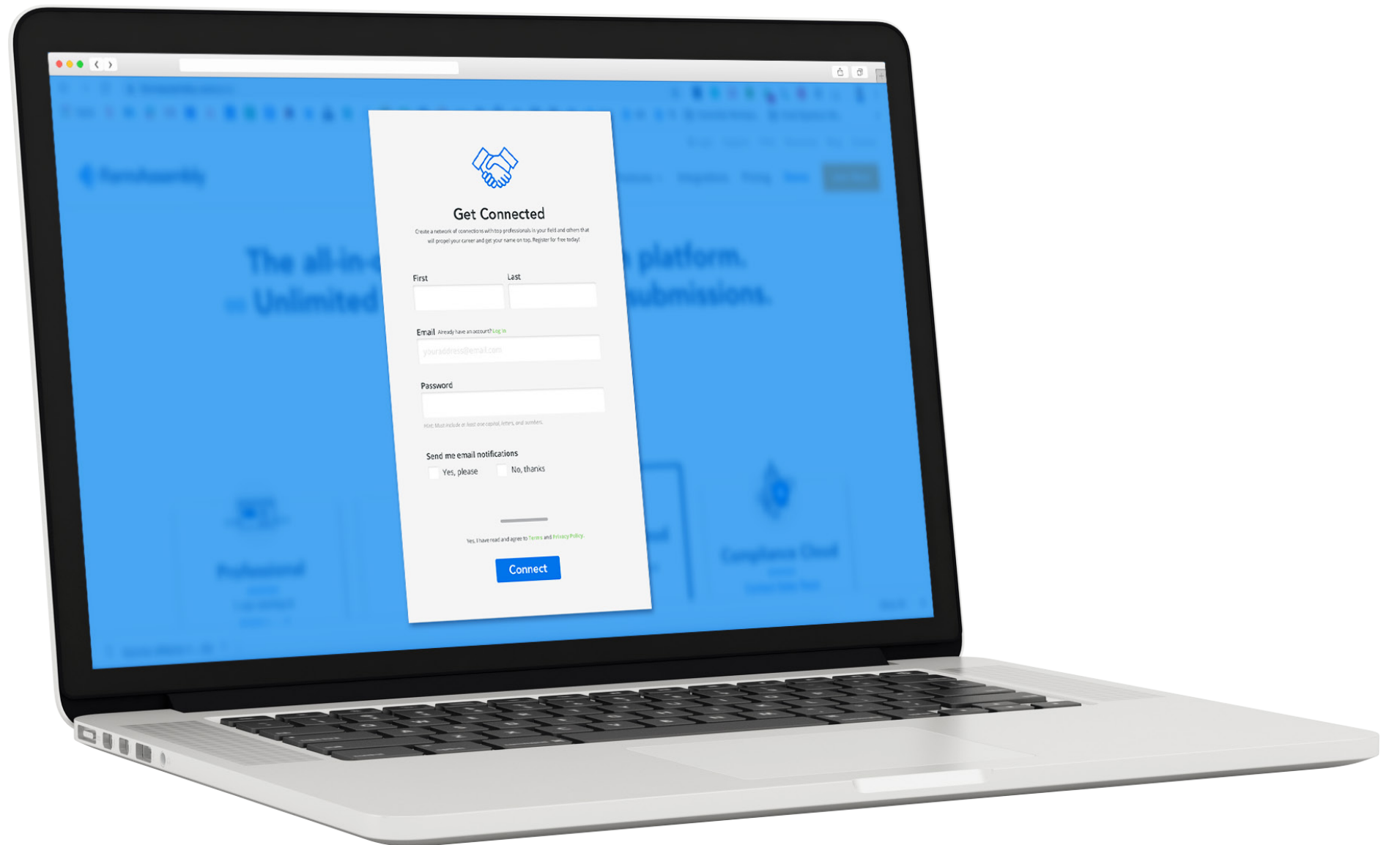




# 3.0

## The forms you'll use

With FormAssembly, you can create forms for nearly any purpose. That means endless use cases for your sales and marketing teams. But there are some forms you're likely to use more than others. Read on for details.





## 3.1 Demo signup form

**Use Case:** Schedule demos of your product through web forms.

**Key Feature:** [ScheduleOnce integration](#) allows users to select a good time for a demo.

### Get a Free Demo Today



Schedule My Demo



## 3.2 Contact form

**Use Case:** Collect product/service inquiries through a web form.

**Key Feature:** Depending on the user's selection from a drop-down menu, FormAssembly can [conditionally send submission notifications](#) to sales or another department.


First Name\*

Last Name\*

Email\*

Organization\*

Please Select...



Message

Send Message



## 3.3 Content download form

**Use Case:** Offer downloads of marketing resources, either as a standalone offer or in conjunction with an event.

**Key Feature:** Use a Pardot Custom Redirect Link in the “redirect to this page” field on the FormAssembly Notifications page so files download when a user hits the submit button.

Ready to Talk About FormAssembly for Your University?

### Contact Us Today

First Name\*

Last Name\*

Phone\*

Ext.

Email\*

Organization\*

Get a FREE higher ed infographic when you fill out your info!

Contact Us





## 3.4 Customer surveys

**Use Case:** Gather marketing data and understand your customers better with a customer survey.

**Key Feature:** Create a custom survey object in Salesforce and connect FormAssembly with Salesforce to transmit data from your survey responses.

### Market Research Survey

*Thank you for being such an amazing member of the FormAssembly family! We would love to leverage your experience to help us better understand the value FormAssembly adds to your organization. Thank you for your help!*

How much time has FormAssembly's form builder saved your team? \*

- ☐ 0-5 hours per week
- ☐ 6-10 hours per week
- ☐ 11+ hours per week

How much money would you estimate that FormAssembly has saved your team? (This can include manpower, developer time, paper processes, etc.) \*

- ☐ \$5000/yr
- ☐ \$10,000/yr
- ☐ \$15,000+/yr
- ☐ \$50,000+/yr

How many projects has your organization used FormAssembly for? \*

- ☐ 1-2 projects
- ☐ 3-5 projects
- ☐ 6+ projects

How many competitors did you evaluate prior to choosing FormAssembly? \*

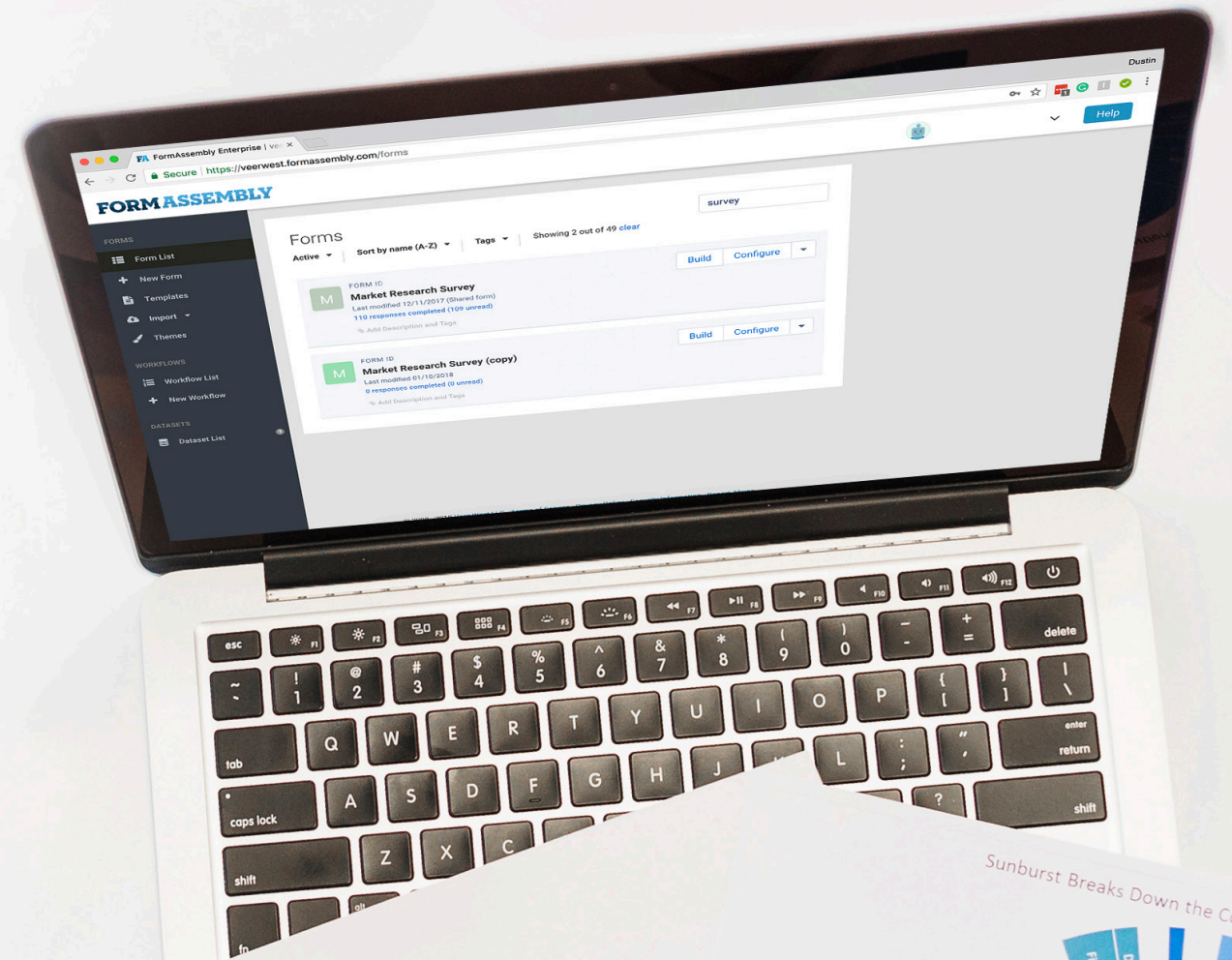
- ☐ None! FormAssembly was my only choice!
- ☐ 1-2
- ☐ 3+



# 4.0

## Key data collection features for marketing & sales

Data collection should be seamless. It should fit with how you work and facilitate the collection of information no matter where you are. Learn more about how FormAssembly's features fit the needs of sales and marketing teams.



## 4.1 Sales

As a salesperson, one of the most important things to look for in a form collection solution is a Salesforce integration or integration with your CRM of choice. Having the ability to send information directly to your CRM from a lead generation form saves hours of manual data entry time and lets you focus more of your time and efforts on selling.

### Salesforce integration

FormAssembly's powerful Salesforce integration enables the creation and updating of records from any Salesforce objects, on any Salesforce product. You can even update custom objects from other AppExchange Apps you use.

### Offline data collection

Salespeople often need to collect data from customers and prospects on the go. Think about a tradeshow or conference where the internet is unavailable, unreliable, or just too expensive.

Collecting information via business cards or pen and paper is an option, but business cards and scraps of paper can easily be lost. Even if you managed to hold on to them, you'd have to take the time to re-enter the information in your CRM at some point after the event.

Digital information collection methods are a much better option, but it's also key to find a solution that allows you to collect information offline and from a mobile device for greater functionality.

#### More information:

[Download the FormAssembly + Salesforce eBook.](#)

#### More information:

[FormAssembly's Mobile App for iOS](#)





## Prefill connector

After you make a sale, or while you're still working on locking a customer down, it's important to have a way to keep their contact records up-to-date. If you don't, you could risk losing contact with a promising lead altogether, or at the very least, make extra work for yourself as you hunt around for the right email address or phone number.

With Salesforce Stay-in-Touch retired as of Summer 2017, it's no longer a long-term option for sales teams that need to keep in contact with their customers. With FormAssembly's Salesforce Prefill Connector and our Salesforce integration, you can send your customers links to prefilled forms, allowing them to update contact information and so much more. Here are some of the added benefits of using FormAssembly for corresponding with your customers:

- The ability to prefill not just contact information, but information from any type of Salesforce record.
- Additional use cases beyond staying in touch, including keeping track of onboarding activities and sending out billing forms.
- Branding and design options that allow far more customization than Salesforce's cut-and-dried Stay-In-Touch forms.

*you can send links to  
prefilled forms to your  
customers, allowing them to  
update contact information  
and so much more*

### More information:

[Download the Stay-In-Touch ebook](#)





## 4.2 Marketing

In many companies, marketing is a one or two-person department. Even in large companies, marketers are often expected to have a wide range of skills and be just as deft at copywriting and SEO as they are at design.

There's not always the time or resources to have a specialist for every area of marketing. This is why data collection gets easier when marketers have access to a form solution they can quickly master and use in multiple ways to achieve goals without having to call in a designer or developer.

### Salesforce Marketing Cloud integration

FormAssembly's Salesforce Marketing Cloud Connector allows you to easily create subscribers, assign subscribers to lists, and send information to your custom data extensions. You can also prefill forms with data from your Salesforce Marketing Cloud Integration with our Salesforce Marketing Cloud Prefill Connector.

#### More information:

[Salesforce Marketing Cloud Connector](#)

[Salesforce Marketing Cloud Prefill Connector](#)

*easily create  
subscribers, assign  
subscribers to lists, and  
send information to your  
custom data extensions*



## Pardot integration

FormAssembly's HTTP connector ensures quick delivery of marketing notifications along with accurate, timely scoring and data processing for the Pardot marketing automation system and Salesforce.

Whether you want to pass form data through Pardot before it's sent to Salesforce or have data simultaneously sent to both, you can customize FormAssembly's connectors to best fit your marketing workflow needs.

The HTTP Connector is particularly useful as a way to pass leads to Pardot drips, automations, and triggers before sending them to Salesforce and setting them as Sales Qualified, rather than having all leads sent straight to Salesforce before qualifying them.

Additionally, you can integrate FormAssembly with Pardot by using FormAssembly web forms on Pardot Landing Pages, or use a Pardot custom redirect link to download an eBook or other marketing material after users fill out a lead form.

## Multiple publishing options

FormAssembly offers multiple ways to get your forms up and running. Options include:

- FormAssembly-Hosted Form - Easy and quick
- iFrame - Keeps form's CSS intact
- Embed HTML - Allows you to make specific HTML changes
- Server-Side Script (API) /WordPress Plugin - No need to republish if you edit the form

More information:

[Pardot Integration](#)

More information:

[Publishing Options](#)



# 5.0

**Does your  
data collection  
solution have  
these 4 things?**



## 5.1 Compliance & security

Data security and privacy are essential. If your data collection solution isn't secure, the integrity of your data is at risk.

At FormAssembly, we consider protecting your data to be one of our primary responsibilities. We're dedicated to following the strictest measures and internal procedures to maintain compliance and certifications across numerous standards and requirements, including: HIPAA compliance, PCI Level 1 certification, and more.

Not all data collection solutions are created equal—especially when it comes to security. FormAssembly holds more compliance certifications than any other web form tool available.

Some types of data that require additional security or privacy include:

- Healthcare information classified as Protected Health Information (PHI). This type of information requires HIPAA compliance, which we offer through our FormAssembly Compliance Cloud.
- Credit card information, protected by the Payment Card Industry Data Security Standard (PCI DSS), also available in our Compliance Cloud.
- Data collected from European users, who are protected under the EU–U.S. Privacy Shield, which all FormAssembly plans are compliant with.

Next, you will find information about some of our most notable certifications.





## HIPAA

For organizations in the healthcare space, maintaining compliance with the United States Health Insurance Portability and Accountability Act (HIPAA) can be a daunting hurdle, especially when it comes to data collection. From gathering Protected Health Information (PHI) to sending and storing that information, it's crucial to understand how your data is secured.

After undergoing both a GAP assessment and additional auditing by third party compliance auditor Coalfire®, we made strategic changes to our processes and procedures to ensure compliance.

Our Compliance Cloud allows customers to access key data security options that ensure their data is collected, stored, and transmitted in a compliant manner.

FormAssembly's HIPAA compliance makes it possible for customers to:

- Securely collect demographic health information
- Conduct medical research via surveys and customer forms
- Conduct patient follow-up surveys
- Gather detailed medical histories via online forms

### 5 Types of PHI FormAssembly Helps Protect

Billing & insurance information

Photographic images &  
biometric identifiers

Test & laboratory results

Patient medical history &  
prescriptions

Chain of custody & transit  
information







## EU–U.S. Privacy Shield

In July 2016, the European Union officially adopted the EU–U.S. Privacy Shield, which means that companies like FormAssembly are now held to additional standards when handling European customers' data.

Working with third party auditor, TRUSTe, we have made adjustments to our privacy protocols and are now able to boast compliance with the new privacy standards. The cutting edge of data privacy is ever changing, which means that FormAssembly's processes and procedures are always evolving. For our European customers, this means that you are able to rest assured knowing that FormAssembly is upholding your users' data privacy rights.



## GDPR

The GDPR (General Data Protection Regulation), in effect since May 25, 2018, applies to organizations both within the European Union (EU) and organizations in other locations that deal with the data of people in the EU. If the GDPR applies to you, FormAssembly is processing data on your behalf and per your instructions, which makes us the Data Processor, and you, the Data Controller.

FormAssembly's robust Information Security procedures and policies are designed to meet the requirements of the GDPR. Additionally, we're providing an updated agreement that includes the legal provisions required by the GDPR.

By choosing FormAssembly as your Data Processor, you will meet your obligations under Article 28 of the GDPR to work with a Data Processor that implements appropriate technical and organizational measures and ensures the protection of the rights of the data subject.

Learn more about the GDPR and the Data Processing Addendum—which is required for all customers in the European Union or customers who qualify as a Data Controller under the GDPR—on our [GDPR FAQ page](#).





## PCI DSS



FormAssembly is proud to have received PCI DSS Level 1 Certification on all plans. PCI DSS compliance sets the bar on how we handle all types of data in the most secure manner. To meet the certification requirements, FormAssembly underwent an Annual Report on Compliance ("ROC") by a Qualified Security Assessor ("QSA").

We worked with our third-party auditor and compliance assessor Coalfire® to review and update our processes and procedures in order to meet the stringent certification standards.

PCI DSS Level 1 Certification has a number of strict requirements that must be completed in order to safeguard the data environment and mitigate risk.

Requirements for PCI DSS Level 1 Certification:

- Build and maintain secure networks and systems
- Be prepared to respond to any system breaches, protect account data
- Maintain a vulnerability management program
- Limit data retention
- Implement strong access control measures
- Maintain an information security policy
- Regularly monitor and test networks

***FormAssembly's  
processes  
and procedures  
are always evolving***



## 5.1 Multiple users

If you're a one-person department or small business, one user account in your form solution may be all you need. You can accomplish a lot with this type of account.


If your organization is large, and the department or departments that need to create forms have more than one person who handles their forms and any integrations, it's necessary to have multiple users.

It's not just enough to keep creating new accounts. This could result in even more confusion and duplication of effort.

FormAssembly's Enterprise and Compliance Cloud offerings start at three users.



## 5.3 Admin control



One of the great features of FormAssembly's Enterprise and Compliance Cloud offerings is the amount of control that account administrators can have over just about every aspect of their account.

When it comes to marketing, having the ability to maintain oversight of your team's forms and make sure they're adhering to high standards for branding is key to maintaining visual consistency for your brand.

## 5.4 Ample support

Free data collection tools might seem like a steal for marketing and sales teams looking to cut costs, but the adage that "you get what you pay for" is often all too true in these cases. You might get a form tool that works for some circumstances, but you likely won't get the support you need if you have issues with your forms or the tool as a whole. FormAssembly's world-class support team currently holds a 97% customer satisfaction rating.

*"you get  
what you  
pay for"*



# 6.0

# Get started with FormAssembly

Ready to see what  
FormAssembly can do?

[Sign Up Today](#)

