

FREE DOWNLOADABLE CHECKLIST:

What to Look for When Evaluating Forms Automation Software

As businesses like yours strive for operational efficiency and streamlined data collection, the need for a forms automation solution is paramount.

While forms software has been around for decades, understanding the requirements to automate complex data collection processes, such as enrollment, onboarding, and servicing requests, can seem overwhelming—particularly in highly-regulated industries. As you embark on the search for a solution, you'll quickly realize there are many options. But, not all are created equal. Most solutions were not designed to meet the complex needs of highly-regulated industries. So, what capabilities and features are most important?

Our evaluation checklist(s) offers key considerations for individuals involved in the decision-making process. With a deeper understanding of the benefits surrounding forms automation solutions, you'll be able to confidently align the features you need with the outcomes you want to achieve.

Customer Experience Features

- | | |
|--|--|
| <input type="checkbox"/> Prefills customer information | <input type="checkbox"/> Includes dynamic video content |
| <input type="checkbox"/> Live data validation | <input type="checkbox"/> Modern look and feel |
| <input type="checkbox"/> Mobile first | <input type="checkbox"/> Start on one device finish on another |
| <input type="checkbox"/> Intelligent questioning | <input type="checkbox"/> Flexible signing/agreement options |
| <input type="checkbox"/> Real-time status updates | <input type="checkbox"/> Consistent experience across channels |
| <input type="checkbox"/> Adapts to preferred language | |
| <input type="checkbox"/> Digitally upload required documentation | |

Automation and Integration Features

- Centralized technology for enterprise use
- Data rules to improve data quality
- Readily integrates with existing core systems
- Automatically maintained and updated
- Flexible data storage options
- Automatic anti-virus scans of uploaded documents
- Low-code interface designed for business analysts
- Designed to protect and secure highly sensitive data
- Multi-tenant SaaS architecture
- ISO, SOC and HIPAA certified

Business User Features

- Drag-and-drop interface
- Single project design (i.e. design once, use everywhere)
- Robust OOTB branding and white labeling capabilities
- Easily build approval workflows
- Pre-built form templates
- Content library

Need more information before transforming your data collection experiences?




[Read our Ultimate Guide to Forms Automation](#)

All This And More with SmartIQ from Smart Communications

- **Flexible Data Outputs**
Take advantage of collected information with a variety of options for data output and data transfers, ensuring maximum utilization of core systems.
- **Mobile Responsive**
With mobile responsive design, SmartIQ™ ensures that every form is mobile friendly – adapting to the device detected – and enhancing the mobile experience for all users.
- **Multi-Tenant SaaS Architecture**
Our robust multi-tenant SaaS architecture simplifies forms automation and data capture, allowing for seamless updates and scalability across your enterprise.
- **ISO27001, SOCI, SOCII, HIPAA Certified**
Our platform's compliance with ISO27001, SOCI, SOCII, and HIPAA certifications demonstrates our commitment to maintaining the highest standards of data security and privacy in our automation tools.
- **RESTful Integration Options**
RESTful integration options facilitate secure and efficient data exchange between online forms and core systems, streamlining your data entry and collection processes.
- **Simplified Form Submissions**
Our IDP integration capabilities support secure and streamlined user authentication, simplifying the form submission process for end-users.

[Click here to learn more](#)



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Smart Communications provides the platform that leading organizations trust to deliver personalized, consistent, and compliant conversations across all touchpoints and channels. The Conversation Cloud™ consists of SmartCOMM™ for enterprise-scale customer communications, SmartIQ™ for digital forms transformation, and SmartDX™ for trade documentation. Over 650 enterprise organizations across the globe rely on Smart Communications to simplify and automate complex processes and deliver highly secure, frictionless experiences across the customer lifecycle.