

# FORMS

A single pane of glass for your data.



It's arguably more valuable than oil, that's right we're talking about your customer data. Experience tells us that the likelihood is you have got a variety of separate systems for various departments and many different forms for data capture. **FORMS** allows your end users to build contextual forms and screens that help to easily digitise and automate processes internally and externally and simplify the process of data capture and data access.

## **FORMS will do the heavy lifting**

It's an all in one solution for busy, customer facing employees. Forget manual inputting or flicking between multiple applications, it's simple, easy and quick for data to be collected, curated and updated. **FORMS** integrates down to a field level and into one or multiple systems. Meaning that your data will update from a form in real-time within your CRM, contact centre, marketing systems and so on. Enabling your employees to operate through a single pane of glass. **FORMS** will not only make it easy for customers and staff to update and access information but importantly will provide you with improved data analytics, insight and technical enforcement of processes.

## **Talk to us about FORMS**

Book a demo to talk about **FORMS** and find out how it could improve your customer experience and sales!

# FORMS in action

Update multiple systems using simple processes



## Create a single form

Customers can easily update their details, via digital channels including email, SMS, or social media tinyurl.



## Pre-population will help

Any information already existing will be pulled through from other systems!



## All systems are updated

Changes are quarantined for approval. Once approved, all of your systems will update in real time.

## Key functions and features

### Simple form and screen creation

You will be able to create bespoke forms and screens, from scratch. Updating and collecting your customer's details has never been easier. If you're creating new fields, it's no problem, FORMS will do this and write it back to all your systems.



### Rule based automation

With FORMS you can fully automate key business processes and working practices. For example, if an update to customer details requires approval, rule based automation can ensure the details are forwarded onto the right person before any other system is updated.



### It's all in real-time

The insight and dashboards that FORMS provides means that you can know which processes are in the pipeline for workflows and ensure that all your systems data is completely up-to-date.



### Task management and scheduling

Enable your employees to manage their time efficiently. FORMS has the capability to create Trello based tasks and schedule them. Giving a clear view of which tasks have been added to the workload off the back of form submissions and contact detail creations.



### Integration capabilities

FORMS integrates with any website, system or app that has an API or JSON capabilities. Plus email, ERP systems like Oracle and SAP. FORMS is a single pane of glass for all your data, no more manual data entry.



# Business benefits



## TURBO-CHARGED PRODUCTIVITY

We're all about Workplace Modernisation. FORMS is there to help make your customer facing agent's lives much, much easier. Watch their productivity more than double as digital orchestration takes over complex and high volume tasks.



## PROBLEM RESOLUTION SPEED

Resolve customer problems at a lightning speed. With the ability to prioritise workload, the digital workflows can ensure your more important customers are contacted first. And with less manual work to do, your problem to resolution speed will reduce.



## USER FRIENDLY

Usability is a priority. Configured users can respond quickly with smart actions to tasks created in FORMS.



## ORGANISED WORKLOADS

Auto-categorising makes organising the workload easy. It means that work can be prioritised and sent to the right person in the business. Also helping to reduce the amount of mistakes made and ensuring that no stone is left unturned.



## FOCUSED EMPLOYEES

We say, the less boring manual work employees need to do, the better. You'll create a workforce that's free from menial work and more focused on making your customers happy.



## LESS DATA ERRORS

With FORMS updating all your systems in real time, you'll see a huge reduction in the amount of data input. And if mistakes are made, they only need to be changed once for them to be corrected across multiple systems!

# TALK TO THE SOLUTIONS PEOPLE

**We know a thing or two about solving business problems.**

Since 1984, we've been matching business problems with the right technology solutions. Creating opportunities for growth, adding value and helping businesses disrupt their market. Digital transformation isn't for the faint hearted, but luckily it's not a journey your business needs to do alone.

**Book a FORMS demo with a member of our team today!**