Workplace Productivity Report

A look into how digitization is shaping workplace productivity and transforming the way people work. Learn about the cutting-edge tools thousands of teams are using every day to boost their efficiency, maximize time, and automate complicated tasks.

About This Report

Data runs our world now more than ever. Estimates suggest that we are close to creating 1.7 MB of data every second for every person on earth. That equals nearly one trillion MB of data per minute. With so much data flowing through the world at any given time, it’s no surprise that workplace productivity is impacted by how you collect, manage, store, and analyze data.

This report outlines the common roadblocks businesses face that minimize productivity and cause miscommunication, misinformation, and inaccurate data collection. It also provides robust solutions for some of the most common—yet complicated—processes businesses rely on.

Did you know?

For every person on earth, we create close to 1.7 MB of data every second — equal to nearly one trillion MB of data per minute.
Our Research

Our team reviewed data in the Formstack database from more than 260,000 anonymized forms created over a 2-year period starting January 1, 2017. These forms spanned all industries and business sizes, including healthcare, legal, real estate, education, and nonprofit.

We also analyzed customer usage of a variety of Formstack workflow automation tools to identify workflow automation benefits and best practices. This included more than 1,900 Workflows with nearly 125,000 submissions; more than 27,000 Formstack Go submissions; and close to 75,000 integration use cases. This data revealed workflow process improvements and multiple workflow examples that are highlighted later in this report.

External sources and data points are included throughout the report to further reinforce our data and findings. Sources are all hyperlinked, and they range from journal publications and international studies to professional blogs and national publications.

The goal of this report is to identify common data collection and management challenges faced by businesses of all industries, sizes, and locations. On the following pages, you will find smart, scalable, and simple solutions that will boost workplace productivity and improve data practices across your organization.
Introduction to Workplace Productivity

How many hours of each workday do you think you’re a productive worker? 7? 5? If you lead a team, you may want to take a deep breath: Research has found that the average worker is productive for only two hours and 53 minutes each day. What gives? You would think that in an era driven by data, technology, and the internet, workers would be highly productive. But sometimes these tools can deter us from getting work done.

Having to access an immense amount of data through umpteen streams of communication and countless different tools can make anyone’s head spin. Data is one of a business’s greatest assets, but poor data management can cause chaos in the workplace. In fact, a McKinsey report found that employees spend 1.8 hours every day—9.3 hours per week, on average—searching for and gathering information.

What else drains your productivity during the workday? Here’s a snapshot of how the hours of an average work week are spent across the US and UK:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Average Hours Per Day</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reading, responding to, and sorting emails</td>
<td>11.2</td>
</tr>
<tr>
<td>Visiting websites unrelated to work</td>
<td>8</td>
</tr>
<tr>
<td>Searching for information</td>
<td>9.3</td>
</tr>
<tr>
<td>Attending meetings</td>
<td>6</td>
</tr>
<tr>
<td>纯粹聚焦在工作上</td>
<td>12.65</td>
</tr>
</tbody>
</table>

That's just the beginning of why productivity might be lacking in your organization. Messy processes, repetitive tasks, paper chases, and inaccurate data are all major issues that can cause you to lose time, focus, and efficiency while at work.

But your business can take control of this data overload. Formstack users have access to cutting-edge tools that make collecting, sharing, and storing data easier than ever. One of these tools is Workflows, which helps businesses eliminate manual tasks, streamline communication, and gather data in a more efficient way.

Our research shows that businesses are taking highly complex processes that have 3+ steps and combining them into a single automated workflow that’s easier to manage and complete. What was once a tedious, labor-intensive, and time-consuming process is transformed into a streamlined and simple workflow.

These workflows involve multiple people, span departments, and include hundreds of data points, but they are completed in less than one business week thanks to clear communication and automation. Formstack users have streamlined key processes from start to finish over 120,000 times since January 2017. That's the power of automation, collaboration, and digitization.

Sources:
- https://www.techzone360.com/topics/techzone/articles/2013/11/05/359192-searchyourcloud-survey-it-takes-up-8-attempts-find.htm
- https://www.inc.com/melanie-curtin/in-an-8-hour-day-the-average-worker-is-productive-for-this-many-hours.html
- https://www.vouchercloud.com/resources/office-worker-productivity

Did you know?

Formstack users have streamlined key processes from start to finish over 120,000 times since January 2017.
**Industry Workflow Insights**

Digging into our database revealed some interesting workplace productivity statistics and workflow automation trends. Here’s a quick snapshot of how industries like healthcare and education are using a variety of Formstack tools to improve workflow automation and data collection.

### Forms Created to Automate Specific Workflows

<table>
<thead>
<tr>
<th>Workflow</th>
<th>Number of Forms Created (Within Last 2 Years)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient Onboarding</td>
<td></td>
</tr>
<tr>
<td>Student Enrollment</td>
<td></td>
</tr>
<tr>
<td>Event Registration</td>
<td></td>
</tr>
<tr>
<td>Donation</td>
<td></td>
</tr>
</tbody>
</table>

### Conversion Rates Across Form Types

<table>
<thead>
<tr>
<th>Workflow</th>
<th>Conversion Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient Onboarding</td>
<td></td>
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<tr>
<td>Student Enrollment</td>
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</tr>
<tr>
<td>Event Registration</td>
<td></td>
</tr>
<tr>
<td>Donation</td>
<td></td>
</tr>
</tbody>
</table>

When comparing the data above to what was collected in our Form Conversion report, a worrisome trend reveals itself: Healthcare forms have, on average, the lowest conversion rates across industries. Why is this? Here are some reasons healthcare forms are lagging so far behind.

#### Timeliness

Patient onboarding makes up a large portion of healthcare forms and data collection. If these forms are not sent out early enough, patients may not have time to fill them out online before their appointment.

Reminders may be lacking as well. People will often open an email, then get distracted and forget to take action. Without multiple and timely reminders, patients forget to fill out the forms and end up filling out a paper version at the office, creating manual work for the office team.

#### Form Layout

It takes a lot of data to provide patients the best care. Many healthcare organizations make the mistake of including all the data points they need to capture on one page, producing an incredibly long form that increases abandonment. The best plan of action is to include 10–15 questions per page, breaking the form up into multiple sections to make it easier to digest.

#### Jargon

The simpler the language, the better. Avoid using jargon, acronyms, and industry language that might not translate to patients. Once you’ve created a form, send it out to a test group for review to ensure the language is clear, concise, and easy to understand.
Collecting and Managing Data with Formstack

Reviewing more than 260,000 forms provided strong insights into how Formstack’s variety of tools are helping teams create powerful workflows. Our data shows that Formstack’s power to combine important business tasks—like accepting payments, automating email communication, and organizing data—are helping businesses tackle data overload.

As shown in the charts below, businesses across the world are utilizing Formstack to complete multiple processes within one workflow. Combining powerful integrations and innovative Formstack tools allows companies to have better control over the collection, sharing, management, and storage of data across departments and functions.

**Common Form Features Used to Eliminate Manual Tasks**

<table>
<thead>
<tr>
<th>Feature</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>eSignature</td>
<td>20%</td>
</tr>
<tr>
<td>File Upload</td>
<td>10%</td>
</tr>
<tr>
<td>Credit Card</td>
<td>5%</td>
</tr>
<tr>
<td>Email Logic</td>
<td>5%</td>
</tr>
<tr>
<td>Credit Card</td>
<td>15%</td>
</tr>
</tbody>
</table>

**Most Used Integration Types**

- **Payment**: 17,429
- **Spreadsheet**: 17,302
- **CRM**: 9,488
- **Storage**: 7,361
- **Email**: 4,624
- **Document Automation**: 4,190

**Number of Submissions Using Top Formstack Tools**

- **Workspace**: 7,447
- **Formstack Go (Since November 2018)**: 17,083
- **Portals**: 1,003,211
- **Workflows**: 643,776

These tools are helping businesses manage and store data effectively, reducing the burden of manual tasks and improving overall efficiency.
Common Workplace Productivity Pitfalls

Through our database research and customer interviews, we’ve identified five common workplace productivity pitfalls plaguing businesses all over the world.

**Data Collection**

Whether due to outdated paper forms, confusing fillable PDFs, or complicated multi-step processes, collecting data is still an issue halting many businesses from making progress on projects, processes, and business improvements.

Inefficient data collection leads to inaccurate data, or no data at all. Form abandonment is a common issue when using tools that make submitting data too complicated, difficult, or time-consuming. Collecting and managing information through paper processes leads to hundreds, if not thousands, of productive hours lost due to manual data entry.

**Storage**

Workers spend nearly a fourth of their workweek searching for information, which includes finding and accessing documents from file storage. Without a centralized data storage solution, workers spend hours searching through multiple storage sites and locations to track down just one file.

**Information Sharing**

How many times have you used the words “per my last email” or “as mentioned in my last email” when communicating with a colleague? Business professionals are inundated with communications from multiple streams, making it more difficult than ever to streamline sharing data.

Relying on email or sending various communications through different channels is a recipe for disaster. Our research has found that consolidating data into one location and communicating within that channel minimizes miscommunication and boosts productivity.

**Automation**

Manual tasks take up a huge portion of the workday across most industries. Automating these tasks—like data routing, emails, and file storage—makes a huge impact on productivity. When something is as easy as set it and forget it, you get ample time back to focus on major priorities.

**Production**

For those in the sales, healthcare, or law profession, manually creating or updating documents can be a nightmare. Finding a way to automatically transfer newly collected data into pre-created documents can unlock ample time, improve customer satisfaction, and simplify complicated workflows.

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**Did you know?**

Data from forms created within the last two years has been automatically routed to a third-party tool nearly 75,000 times to eliminate manual work.
Transform Your Processes

Teams need easy and efficient access to data in order to perform to the best of their ability. In fact, a recent study by IDC found that workers waste 30 percent of their time—an average of 14 hours per week—because they can’t find, protect, or prepare data.

Streamlining how you collect, process, use, share, and store data is a crucial step in improving workplace productivity. When you minimize data gaps and maximize data workflows, your organization could save millions of dollars and earn back hundreds of hours.

Did you know?

IDC estimates that data management inefficiencies are costing US organizations $1.7M per year for every 100 employees and European organizations €1.1M per year for every 100 employees.

If you want your organization to work more efficiently, establishing clear flows of data, communication, and collaboration is a must. Formstack is here to help on that front. Read on for workflow examples that span multiple industries to help your team transform the way you capture data and put it to work.
The patient check-in process is a crucial moment for healthcare organizations. Using outdated, inefficient, and labor-intensive processes to collect, store, and transfer patient data during check-in threatens patient safety and satisfaction as well as the productivity and profitability of your organization.

**Paper Documents and Forms = A Huge Cost**

The average healthcare organization pays:
- $20 to file a paper document
- $120 to find misfiled documents
- $220 to recreate a lost document

**Poor Practices Threaten Patient Health and Safety**

Inefficient workflows result in loss of data, miscommunication, and sometimes deadly consequences.
- 80% of mistakes made in the healthcare industry are administrative.
- Preventable medical errors are the 4th cause of death in the US.
- Patient charts cannot be found in 30% of visits.

**Data Breaches Leave Permanent Damage**

The healthcare industry suffers 340% more security incidents and attacks than the average industry.
- More than 13 million healthcare records were exposed due to data breaches in 2018 alone.
- 1,421,107 from a single phishing attack
- 1,248,263 through an insecure online portal
- 301,000 during an office move

Improve patient satisfaction and retention by transforming your check-in process with a secure, simple, and efficient workflow. Including multiple steps in one process will make data collection faster, safer, and more effective for your entire organization.

**A Better Way to Gather Patient Information**

The healthcare industry suﬀers 340% more security incidents and attacks than the average industry.

Patient fills out HIPAA compliant medical history form online
Information is routed to doctor’s office
Patient uses iPad to check in for appointment at front desk
Patient verifies info on file and electronically signs
Co-pay is made using HIPAA compliant payment integration
Email confirmation of payment is sent to patient

Sources:
- [http://www.techceocouncil.org/clientuploads/reports/A_Healthy_System_Final.pdf](http://www.techceocouncil.org/clientuploads/reports/A_Healthy_System_Final.pdf)
- [https://www.formstack.com/industry/healthcare/patient-onboarding](https://www.formstack.com/industry/healthcare/patient-onboarding)
- [http://www.techceocouncil.org/clientuploads/reports/A_Healthy_System_Final.pdf](http://www.techceocouncil.org/clientuploads/reports/A_Healthy_System_Final.pdf)
- [https://www.formstack.com/industry/healthcare/patient-onboarding](https://www.formstack.com/industry/healthcare/patient-onboarding)
If your school is still stuck using paper scholarship applications or clunky tools, it’s time for an overhaul. Transforming your process will open the door for more students to attend your school, plus save your employees hundreds of hours by eliminating tedious and time-consuming tasks.

**Education: Scholarship Application**

If more students need help tackling student debt, it's crucial that your financial aid department makes applying for scholarships a streamlined and simple experience.

The average college graduate in 2016 had $37,172 of debt.

Low-income families spend 60% of net family income on college costs.

It's the digital age, and your students are living it through every facet of their lives. Generation Z is entrenched in technology like no other generation before; your school must meet them where they are to fulfill enrollment goals.

94% own a smartphone.

50% are online for 10 hours or more a day.

82% plan on using scholarships to pay for school.

Every year, students are losing out on the opportunity to fulfill their dream of a college degree due to poor processes, inefficient workflows, and inaccurate data collection.

Administrative issues and processing challenges have resulted in:

- 15% of eligible students losing out on receiving Cal Grants
- 28,000 students receiving a false acceptance letter to UC San Diego
- 50 UT Tyler students getting full-ride scholarships revoked

Did you know?

When the San Antonio Foundation took their scholarship application process 100% online, they saw a 25% increase in applicants.

Proper data collection and management is key to running an efficient scholarship application process. Eliminate hours of time performing manual tasks, like routing paper forms or tracking down approvals, by creating a form workflow that manages all crucial steps of the process.

**Students Need Aid Now More Than Ever**

Going Paperless Increases Applicants

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**Financial Aid Processes Could Be Hurting Students**

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**Launch a Streamlined Scholarship Application Process**

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**Sources:**

- [https://blog.scholarshipamerica.org/should-your-scholarship-application-be-on-paper-or-online](https://blog.scholarshipamerica.org/should-your-scholarship-application-be-on-paper-or-online)
- [https://www.givainc.com/blog/index.cfm/2015/1/23/Effects-of-Scholarships-on-Student-Success](https://www.givainc.com/blog/index.cfm/2015/1/23/Effects-of-Scholarships-on-Student-Success)
- [https://www.nitrocollege.com/blog/how-gen-z-is-managing-student-loan-debt](https://www.nitrocollege.com/blog/how-gen-z-is-managing-student-loan-debt)
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- [https://collegefutures.org/2015/06/study-shows-scholarships-boost-college-enrollment-for-low-income-students/](https://collegefutures.org/2015/06/study-shows-scholarships-boost-college-enrollment-for-low-income-students/)
Events: Lead Generation

Sourcing new leads at events is key to growing your business. Yet if you're unable to quickly communicate with these leads, all the time (and money) invested in lead generation at events will go to waste. Boost your event marketing ROI by implementing a workflow that turns leads into sales.

**Why Lead Generation Matters at Events**

Events are one of the best ways to generate new leads for your sales team. Creating a quick and easy lead generation strategy for events will bring your company huge returns.

- 81% of trade show attendees have buying authority.
- 44% of marketers experience a 3:1 ROI from event marketing.
- 68% of B2B marketers agree that live events help generate the most leads.

Did you know?

- Meeting a prospective customer at an exhibition versus in the field saves an organization $943!
- Letting hot leads from events fall through the cracks, even for a few hours, can ruin the sales team’s chances at closing the deal.
- 55% of companies take more than 5 business days to follow up on a lead.
- If you take more than 5 minutes to respond to a lead, the odds of qualifying that lead decrease by 50%.
- Businesses that nurture leads make 35% more sales at 33% lower cost than non-nurtured prospects.

Technology Is the Key to Better Lead Management

Sales teams everywhere are struggling to find the right tech to help them reach their sales goals. Inefficient processes, manual data entry, and a lack of communication and data accessibility are major culprits of lost sales.

- 6% of marketers believe their company converts trade show leads, contacts, and conversations into customers well.
- 7% of businesses respond in the first 5 minutes after a form submission.
- 27% of salespeople are spending an hour or more on data entry each day.

Don’t leave money on the table due to poor communication with warm leads from events. Ensure timely responses by incorporating automation into your lead generation workflow. Using better technology across departments will solidify your sales pipeline and deliver a better ROI.

**Why Lead Generation Matters at Events**

**Connecting Quickly with Event Leads is Crucial**

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**Turn More Event Leads into Closed Deals**

Even in the age of technology, sales professionals are still spending hours on data entry. This is a waste of time when you could be closing deals. Using technology to automate lead generation can help you save time and close more deals.

- Event attendee uses tablet at booth to submit contact form
- Automatic confirmation email is sent same day thanking lead
- Lead info is automatically routed to CRM
- Pre-generated email is sent to lead within 24 hours to book call with sales
- Data is automatically synced between CRM and marketing automation software

**Turn More Event Leads into Closed Deals**

**Sources:**

TheCostEffectivenessofExhibitionParticipation.pdf
- https://www.hubspot.com/marketing/statistics
- https://www.newreleasetracking.com/blog/lead-response-best-practices
- HelloEndless.com/event-marketing-stats/
- https://blog.griffit.com/lead-nurture-survey/
Hiring new employees comes at a cost: It takes an average of 52 days and $4,000 to hire a new worker. This is why employee retention is crucial to business success. Don’t let inefficient onboarding processes and a lack of technology cost your company even more.

**First Impressions Are Everything**

A new employee’s first months make or break their relationship with your organization. A large part of this success comes from the onboarding process, which makes a major impact on the happiness, productivity, and longevity of new employees.

- 22% of turnover occurs within the first 45 days.
- 33% of new hires look for new employment within their first 6 months on the job.
- The average company is losing 1 in 6 of their new hires each month for the first 3 months.

Poor employee retention can be turned around when a standardized and efficient onboarding process is implemented.

A strong onboarding process improves new hire retention by 82%.

53% of HR professionals say employee engagement increases when onboarding is improved.

69% of employees are more likely to stay at least 3 years after a great onboarding experience.

**Did you know?**

A negative onboarding experience results in new hires being 2x more likely to look for other opportunities.

One of the major barriers to providing quality onboarding technology is the content of your onboarding program too often is ineffective if the technology you’re using to deliver it is not working well.

- 44% of companies say that onboarding is inconsistent across the organization.
- 36% blame insufficient technology for their inability to automate and better organize onboarding programs.
- 39% do not have the right technology to reduce administrative error, ensure consistency, and improve accountability.

A lot goes into onboarding new employees, including gathering and sharing tons of data, information, and forms. Keeping track of submissions, deadlines, and to-dos can be time-consuming and costly. Streamline and automate the process with a one-stop shop for all new employee forms and information.

**Better Onboarding = Higher Employee Retention**

- Automatic email invites new hire to employer’s Onboarding Hub
- HR tracks form submissions and sends automatic email reminders on pre-set dates
- New hire completes all necessary onboarding forms
- PDF versions of new employee documents are automatically generated
- HR and employee electronically sign documents
- Docs are stored in appropriate employee file within cloud storage

**Create a Successful Onboarding Experience**

Sources:
- https://www.personal.bsc.edu/~italy/employee-onboarding-first-impressions-really-do-matter
- https://hbr.org/2015/03/technology-can-save-onboarding-from-itself
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- https://www.shrm.org/resourcesandtools/hr-topics/talent-acquisition/pages/onboarding-key-retaining-
- https://www.urbanbound.com/blog/onboarding-infographic-statistics
- https://learn.g2crowd.com/hr-statistics
- https://www.shrm.org/resourcesandtools/hr-topics/talent-acquisition/pages/onboarding-key-retaining-
- https://www.g2crowd.com/categories/explor/equipment
- https://www.g2crowd.com/categories/explor/equipment
- https://www.shrm.org/resourcesandtools/hr-topics/talent-acquisition/pages/onboarding-key-retaining-
- https://www.g2crowd.com/categories/explor/equipment
- https://www.g2crowd.com/categories/explor/equipment
- https://www.shrm.org/resourcesandtools/hr-topics/talent-acquisition/pages/onboarding-key-retaining-
As of 2018, there were more than 1.3 million lawyers practicing within the US. This amount of competition makes it more important than ever to attract and retain clients. If your law office is wading through paper documents and slow to process information, client satisfaction and retention will suffer.

Legal: New Client Contract

Client submits general info through a mobile-responsive lead form on website
Attorney is automatically notified and sets up initial consultation
After consult, client fills out client intake form
Contract is automatically generated and emailed to the customer
Contract is signed by both parties and saved in online storage
A secure online form collects payment
Receipt is emailed to the customer

Sources:
5. https://www.imarc.com/blog/2016_legal_marketing
8. https://www.imarc.com/blog/2016_legal_marketing
Closing more sales and improving profits relies on improving processes. Research shows that lost productivity and poorly managed leads cost companies at least $1 trillion every year. Using automation to eliminate tedious, time-wasting, manual tasks will give your sales team the time they need to focus on leads and close more deals.

### Efficient Processes Slow the Sales Cycle

Sales teams everywhere are bogged down by non-selling activities, like paperwork and manual data entry. When their time is taken up like this, the sales cycle suffers.

- 25% of salespeople say paperwork is their biggest time waster.
- 40% of a sales rep’s time is spent looking for somebody to call.
- 34% of a sales rep’s time is spent focused on selling.

### Response Time Matters

Improving productivity and closing more sales is greatly impacted by a sales team’s ability to collect and share data. With 67% of the buyer’s journey now being completed digitally, it’s more important than ever to focus on new automated workflows that don’t hold you back.

25% of sales executives say hitting sales goals relies on improving the productivity of sales reps. 80% of companies say productivity would improve with a better process.

### Better Processes Close More Sales

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- 91% of sales executives say hitting sales goals relies on improving the productivity of sales reps.
- 80% of companies say productivity would improve with a better process.
- 91% of the top-performing sales organizations collaborate across all departments to close big deals.

### Automating Your Sales Proposal Workflow

Empower your sales team and improve the customer experience by implementing an automated sales workflow that bridges the gap between marketing and sales. Improve new leads in seconds and improve the flow of data across your entire organization.

- Prospective customer submits information through lead generation form
- Lead data is routed to available salesperson
- Information is collected using proposal request form during sales call
- New opportunity is automatically created within Salesforce
- Sales proposal document is generated and emailed to prospective customer
- Shares this Infographic

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Sales: Sales Proposal
Thanks to the graphics on the previous pages, you’ve seen how Formstack’s powerful tools can transform complicated and time-consuming tasks for your organization. In this section, we share with you two real-life stories of how Formstack has helped businesses revolutionize their processes.

**The First Academy Saves Thousands of Dollars with Formstack**

**Holy Cross Energy Boosts Linemen Productivity with Formstack Go**
The First Academy Saves Thousands of Dollars with Formstack

The Challenge

The need for a multi-organizational forms solution is huge at The First Academy, located in Orlando, Florida. The school is a Christ-centered preparatory school that annually enrolls around 1,400 students in preschool through 12th grade. Eliminating paper forms would require a complete overhaul of traditional processes in departments like admissions, advancement, HR, facilities, marketing, HR, and IT. The school had to develop forms for nearly every scenario, from employee onboarding and tracking, to accepting online payments and creating automated tickets for help desk requests.

The Problem

The main problem was the need for a single solution that could simplify the entire digitization process. The school was using a variety of tools, none of which were able to capture all the needs of the new school in terms of integrating with other tools and solving specific problems like creating automated tickets for help desk requests.

The Solution

Formstack offered the school a single solution that could meet the specific needs of the new school. The school’s IT team was able to create forms that were easy to use and provided solutions for problems like accepting online payments and creating automated tickets for help desk requests.

The Benefits

1. **Administrative Cost Reduction:** The school was able to reduce its administrative costs by $90,000 annually.
2. **Operational Efficiency:** The school was able to improve its operational efficiency by streamlining its forms and processes.
3. **Increased Revenue:** The school was able to increase its revenue by $3,000 annually.
4. **Data Security:** The school was able to improve its data security by eliminating the need for manual payments and reducing the risk of fraud.

The Authorize.Net Integration

The school used the Authorize.Net integration to run all their payments online. The integration allowed the school to process more than $100,000 each year using Formstacks with Authorize.Net. The collections team would not be able to do their job if they could not run payments online.

Campus Event Registrations

Using well-branded forms that look native to The First Academy website has boosted event registrations. The Google Analytics integration provides full access to important data around ad conversions and referral tracking, allowing the school to focus their ad spending on what really works.

Employee Onboarding

The Google Analytics integration plays a key role in their success as well. They utilize the integration to track ad conversions to their events page. This is huge, considering each submission has an ROI of about $90,000 a year in administrative costs.

The roadblock for The First Academy. “There was no way of knowing which advertising channels were pulling in the most event sign-ups. ‘We are now able to make informed, data-based decisions on things like where we should allocate our advertising dollars, whether an increase or decrease is justifiable, and whether a particular ad type or campaign is working for us.’”

The final issue The First Academy faced was tracking referrals for event sign-ups. “We know that getting a referral is the biggest feature we offer. The area driving the most referrals is campus tours.”

“Authorizing net was the biggest feature we offer. The area driving the most referrals is campus tours. With our new forms, we were able to track referrals for every event sign-up. This meant that parents had to go through the inconvenience of rummaging for their checkbook or stopping by an ATM. It also created hundreds of hours of work for the collections team. The inefficient payment process became a huge problem for The First Academy. It just wasn’t very effective or immediate,” Nethers shared.

Creating clear channels for communication was another big issue impacting departments across the school. Miscommunication between HR and IT was rampant. There was no efficient way for HR to communicate with IT about the specific needs of the new student or teacher. Data would not get transferred and help desk tickets wouldn’t be resolved in a timely manner. This dynamic workflow makes it easy for HR to communicate with IT about new teacher needs. The form gives the employees a simple and fast way to transform their paper forms into digital forms without needing knowledge or the ability to code. “We came to Formstack due to the ease of use,” Nethers said. Formstack was the solution to the problem of accepting online payments, or other features they needed, like accepting online payments, or other features they needed. Other tools either didn’t offer the features or didn’t work as well.

The school looked at Formstack competitors but ran into issues. Other tools either didn’t offer the features or didn’t work as well. The school decided to use Formstack due to its ease of use and the ability to create forms that were native to the school’s website.

The team at The First Academy needed something that would be simple to use, without requiring technical knowledge or the ability to code. “We were paper-based, which led to inaccurate data collection, inefficient work, lots of manual labor, and even major financial loss. The inability to accept payments online was a huge roadblock for The First Academy. “There was no way of knowing which advertising channels were pulling in the most event sign-ups. ‘We are now able to make informed, data-based decisions on things like where we should allocate our advertising dollars, whether an increase or decrease is justifiable, and whether a particular ad type or campaign is working for us.’”

“We are now able to make informed, data-based decisions on things like where we should allocate our advertising dollars, whether an increase or decrease is justifiable, and whether a particular ad type or campaign is working for us. We ended up doubling our ad spend. We ended up doubling our ad spend. We ultimately were able to modify our campaigns, create and try new campaigns, and ultimately found the right channel to focus on. ‘We are now able to make informed, data-based decisions on things like where we should allocate our advertising dollars, whether an increase or decrease is justifiable, and whether a particular ad type or campaign is working for us.’"
Holy Cross Energy Boosts Linemen Productivity with Formstack Go

Holy Cross Energy employs nearly 50 linemen who provide services to more than 55,000 members throughout Colorado. In 2017, the Holy Cross team decided it was time to eliminate outdated and inefficient paper processes for their linemen to improve communication, speed, data collection, and efficiency of their daily projects.

**The Challenge**

Linemen at Holy Cross perform an array of different jobs, from installing power lines to fixing transformers. The team is constantly out in the field, and paper forms were complicating already stressful jobs, like installing upwards of 100 meters at a time.

For these types of projects, the linemen would have to find or create a form that fit exactly the amount of meters they were installing, by columns and rows. They would then take the paper form to the site, hand write in all the meter codes, and bring the paper form to the office. Employees would then have to manually enter all the data into their system and route it to the GIS department.

This system wasted time, created barriers to communication, and caused errors in Holy Cross’s data. There also wasn’t an easy way to include photos of the newly installed meters for auditing. When it came time to share reports, it was difficult for them to produce clean, organized reports for employees and customers.

“Formstack, overall, has been a successful product. It helps us communicate better and breaks down the silos at Holy Cross because departments work together to collaborate,” said Lori Welch, a software and systems specialist. “Formstack Go has eased functionality for everybody so much. It was easy for the linemen to use and start developing.”

Internet access is not always a given at job sites, so Holy Cross needed a solution that works offline. Because their linemen work in the field and travel through three different cities, they needed something that was mobile, flexible, and user-friendly. This is what brought them to Formstack, WebMerge, and the Formstack Go app.

**The Solution**

Since implementing Formstack, Holy Cross has developed 200 forms across all departments, including 20 for linemen. They’ve also integrated with WebMerge, a Formstack company, to create stylized PDFs, letters, and reports.

“Formstack is a great application. It’s easy to use and intuitive. It has fit all of our needs, and I haven’t found a problem I couldn’t solve using it.”

Lori Welch, Software and Systems Specialist

**Two Key Workflows**

**Meter Installation**

Tracking the installation of new meters is simple, easy, and quick now for the Holy Cross linemen. Using iPads with Formstack Go has made their data collection, transfer, audit, and storage much more efficient.

**Energy Access**

Bringing energy to a new area requires a lot of data and collaboration from multiple teams. Using Formstack Workflows, Holy Cross is able to streamline the process and provide different teams the access they need to expedite this process.

1. Electrician or general contractor accesses load form online
   - Step 1

2. Conditional logic guides submission data depending on job type
   - Step 2

3. On submission, electrician, general contractor, and owner are notified
   - Step 3

4. Various teams receive custom emails with project details
   - Step 4

5. Engineers edit fields, make notes, and submit form
   - Step 5

6. File is stored in consumer record
   - Step 6

7. Workflows sends the form to multiple engineers
   - Step 7

8. Data is sent through WebMerge integration to create final PDF file
   - Step 8
Analyzing 260,000 forms and nearly 2,000 workflows gave us some clear insights on how to boost productivity and implement workflow process improvements. Use some of these best practices to take full advantage of workplace digitization, from your tech stack to your workflows.

**Workplace Productivity Tips**

**Maximize technology through integrations**

The most common culprit of data mismanagement is spreading data throughout too many tools, without an easy way to organize the flow. Using integrations is an easy way to avoid data mishaps and ensure clean, clear, and efficient data transfers happen across people, departments, and tools.

Integrations allow the tools you already use to work better, together. They help minimize manual data entry, improve data integrity, and maximize the usefulness of the tools and software you invest a lot of money in. When choosing workplace digitization products, make integrations a priority when investigating your options. This way, your team can invest in a tool that will easily connect with your current tech stack.

**Trigger communication through one tool**

One major misstep that continually sabotages workplace efficiency is communicating through too many channels. When working on a major project or managing a digital workflow, keeping communication streamlined inside one app or tool can eliminate many miscommunications that often result from multiple conversations happening through email, chat, meetings, and other forms of technology.

Using a tool like Portals or Workflows can help curve the many different streams of communication and centralize it in one secure location. Whether you need to track approvals, send automated reminders, leave notes, or collaborate across departments, these tools can help streamline communication when collecting and managing data.

**Identify one hub for all data storage**

Wasting time searching for documents and files is a well-known employee productivity killer. Research has shown time and time again that accessing and searching through document storage can waste nearly a fourth of the work week. Many organizations have a fractured system for document storage that includes multiple different tools and storage locations.

Centralizing data, documents, and files in one secure file storage solution will minimize the time it takes to locate important files and, thus, improve efficiency throughout your organization. Identifying one location for all file storage is an easy workflow process improvement that will save hundreds of hours for your organization.

**Eliminate extra steps**

Nobody wants to muddle through a complicated or confusing process. The more steps involved in a process, the more likely that problems will arise. One major workflow automation benefit is eliminating extra steps by combining multiple processes into one.

Consider the top form features chart in the Collecting and Managing Data with Formstack section of this report. All of these tools—eSignatures, credit card fields, email notifications, and file uploads—allow Formstack users to combine multiple processes into one form. This simplifies their workflows and improves the likelihood of conversions by minimizing the amount of steps customers or employees must take to finish the submission.

**Minimize data inaccuracies**

When the tools you use every day don’t transfer data back and forth, your team is left with inaccurate information that can break down many of your daily processes across teams. Although many tools and integrations offer data syncing, it often only goes one way, creating huge data gaps across systems.

Creating a bi-directional data sync between your most vital systems will help you ensure that data is consistent across all departments, from marketing and sales to support and operations. Adding a data sync tool to your workflows will also minimize manual data entry and data duplicates across systems.
Conclusion

It’s no surprise that improving data collection and management processes is what it takes to boost workplace efficiency and employee productivity. With data becoming increasingly more important to businesses by the minute, implementing workflow process improvements is crucial to cutting through the chaos.

It’s time to say goodbye to inefficient and complicated manual tasks for good by investing in tools that make workflow automation simple to implement throughout your organization. The amount of data you process day in and day out is only going to grow going forward. By auditing and analyzing your processes and implementing new strategies, workflows, and technology now, you’ll be ahead of the ever-changing data landscape.
The Team Behind This Report

The 2019 Workplace Productivity Report was prepared by Formstack, a workplace productivity platform built to transform the way people collect information and put it to work. With its powerful data collection and process automation capabilities, Formstack reduces data chaos and solves important business problems. Our users live and work all over the world and utilize a wide array of robust tools to solve their most challenging data management issues.

Forms
An intuitive, easy-to-use form builder with powerful features that streamline and simplify data collection. Accept payments, gather customer data, and automate your day-to-day tasks in just a few clicks.

Surveys
Build surveys in minutes with over 15 question types and a selection of ready-to-go templates. No coding or technical expertise required. Embed them on your website, send via email, share on social, or conduct them in-person.

Documents
Populate custom PDFs, Word docs, Excel sheets, and PowerPoint presentations with data from your forms in seconds. Easily attach files to emails, store them in the cloud, or send them to dozens of third-party apps.

Sync
Access pre-built, expert-level, bi-directional integrations that sync data between your most vital business systems. Allow each of your teams to use the right systems for their needs while ensuring smooth processes and consistent data across departments.

Portals
Create an easily accessible hub for your forms to seamlessly share individual forms or groups of forms with designated people inside or outside of your organization. Track user completion of your forms and send automated reminder emails.

Workflows
A flexible workflow automation tool that gives you an easy, dynamic way to manage company processes. Let multiple people in your organization collect, review, and edit information on a single form.

Formstack Go
Submit forms on the go anywhere in the world, even when offline. Use this mobile app for team members that need to capture data at conferences or out in the field where there is no reliable internet connection.

Ready to improve productivity with Formstack?
Solve your organization’s most frustrating data collection and management issues with Formstack’s simple, yet powerful tools. Boost workplace productivity, improve communication, and end the data chaos. Contact us now to get started!

Contact Us