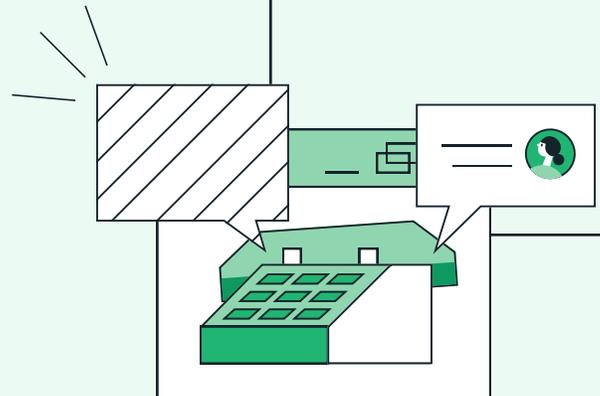
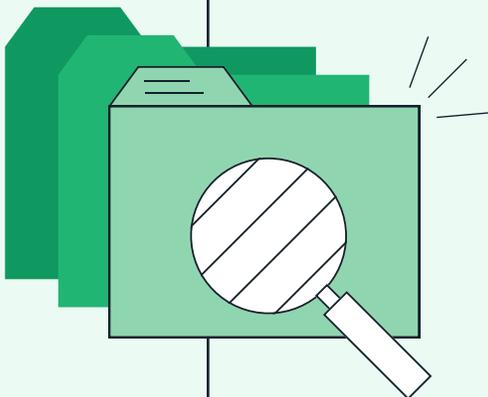




INTERACTIVE CHECKLIST

# Financial Services Checklist: Choosing No-Code Software

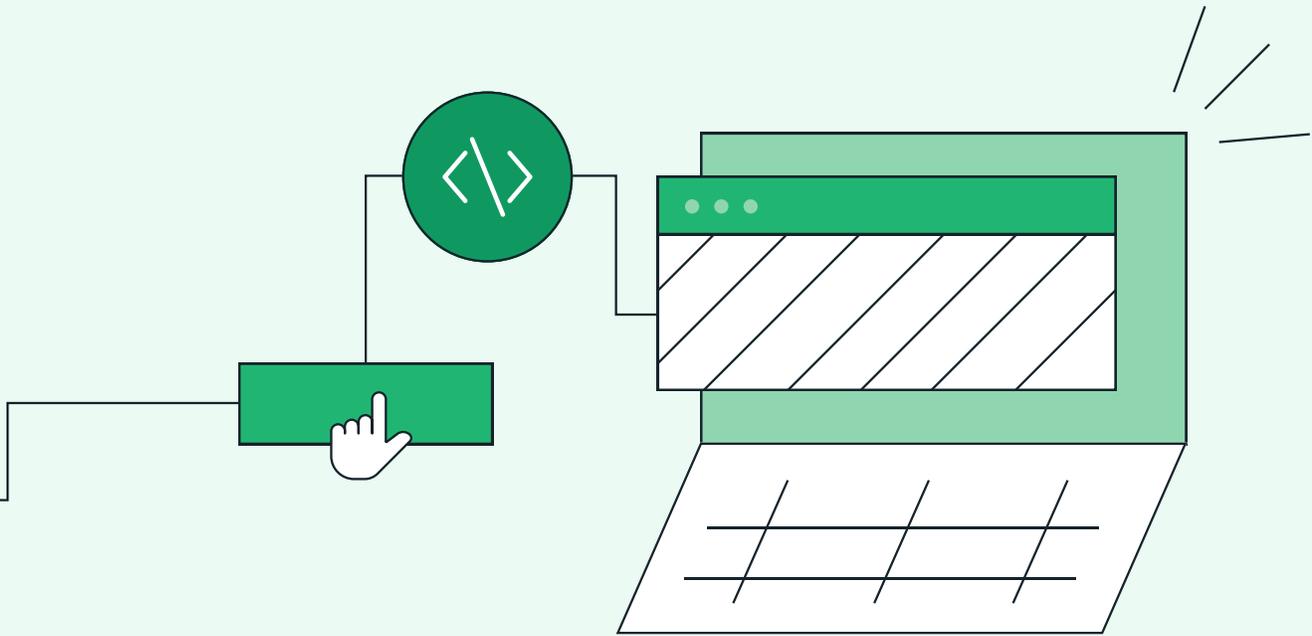


# Financial Services Checklist: Choosing No-Code Software

Table of Contents

Introduction .....	3
Organize Your Stakeholders .....	4
Identify Your Needs .....	5
Consider Your Integrations .....	6
Make a List of Must-Haves .....	7
Research Solutions .....	9
Schedule a Demo .....	10
Implement Your Software .....	11
Launch Smoothly .....	12





You've heard about the power of no-code software and want to empower your team and department with tools to build their own workflows. You're making an excellent choice! Get ready to save time and money through faster workflow implementations and simpler software adoption.

As a no-code solution, Formstack knows a thing or two about no-code software selection and implementation. We've compiled this interactive checklist to help guide your financial services institution with best practices as you move from researching no-code software to building your first workflow.

# Organize Your Stakeholders

Now that you're familiar with the [benefit of no-code tools](#), your next step is to spread the word! First, you're going to need to get your team on board. To gather buy-in from key stakeholders, you'll need to prove how a new solution will add value to your organization.

- Cultivate no-code champions within multiple departments across your institution.
- Create a proposal that projects overall ROI, such as improving the customer experience or supporting interdepartmental information sharing.
- Work with the employees who will be using the no-code software every day to understand their needs and abilities.
- Coordinate with the person who will be responsible for the final decision on your no-code solution.
- Identify and share how no-code tools can save time, money, and resources for each department.

Budget \$			
	No-Code Champions	Everyday Users	Decision-Maker
Team Member			





**Want to automate your project proposal creation?  
Formstack has pre-built templates to help you get started!**

## Identify Your Needs

Apps and software are crucial to keeping your workflows running smoothly. But organizations often run into the problem of collecting too many [point solutions](#) rather than cultivating an efficient tech stack.

Take time to evaluate technical gaps in your institution to identify the problem a new solution would solve.

- Create a list of what workflows are working and what workflows need to be updated or added.
- Consider what a limited tech stack is currently costing your organization. If things aren't getting done, that cost may be recouped by investing in no-code tools.
- Interview employees to learn where no-code tools would be most beneficial.
- Outline a timeline for software implementation, but remember that no-code software is built to be easy to use and adopt.
- Find ways to use one solution to solve multiple problems. For example, this might include opting for an integrated platform solution over multiple point solutions.



**Needed Workflows:**

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**Workflows to Improve:**

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## Consider Your Integrations

Whether it's for client onboarding or quote management, your organization runs on software. So you'll want to choose a solution that integrates with the tools you already use.

Here are some things to consider as you identify which tools you'd like your no-code solution to integrate with:

- Could data in your CRM, marketing automation, or customer support software be more effectively used if you were able to easily and quickly connect workflows?
- How well is the data in your priority systems maintained? Could a simple no-code solution help employees keep information up-to-date?
- Would you be able to more effectively collaborate between teams if your new, no-code solution integrated with a priority solution in another department?



Once you've outlined the workflows you'd like to build or optimize with a no-code solution, take time to make a list of any software you currently use—or would like to use—in these processes.

Priority Integrations		
	Software already involved in this workflow	Software to be added to this workflow
Workflow #1 _____		
Workflow #2 _____		
Workflow #3 _____		

## Make a List of Must-Haves

No-code and low-code tools come in all shapes and sizes, so take time to consider what's most important to your team. Maybe you need a tool that integrates with your CRM or a solution with a dedicated customer support team.



Here's a list of possible must-haves to help you narrow your search:

- Ease of Use
- Scalability
- Integration Options
- Customization
- Open API for Custom Integrations
- Security and Compliance Requirements
- Quality Customer Support
- Reporting and Analytics
- Access to Professional Services
- Ongoing Maintenance Requirements
- Price (Initial Costs vs. Long-Term Costs)
- Agility and Flexibility
- Ease of Setup

**Other Must-Haves**

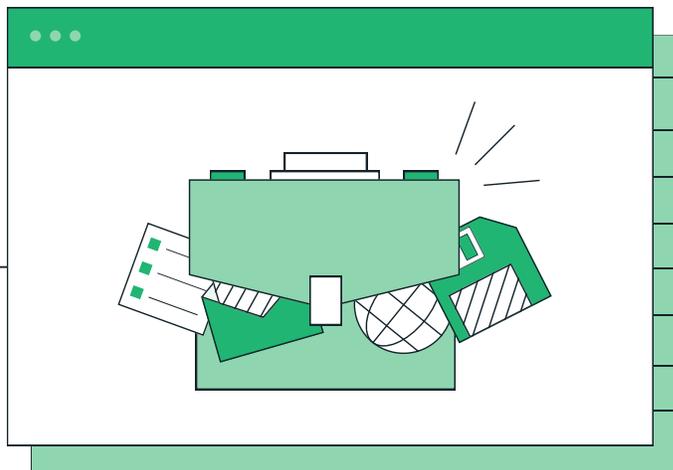
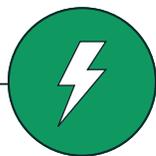
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Top Three Must-Haves		
Must-Have #1	Must-Have #2	Must-Have #3





## Research Solutions

Now that you know what problems your organization is trying to solve and what you need out of a no-code solution, it's time to do some research. These resources will help you to narrow down your search and compare tools based on your outlined criteria. Make a list of your top five no-code solutions.

[G2](#)

[SaaS Genius](#)

[TrustRadius](#)

[PC Mag Business Software Index](#)

[Capterra](#)

[GetApp](#)

### No-Code Software Shortlist

1. \_\_\_\_\_

4. \_\_\_\_\_

2. \_\_\_\_\_

5. \_\_\_\_\_

3. \_\_\_\_\_



## Schedule a Demo

Now that you've done your research and assessed your software needs, you're ready to schedule some demos. Share your list of must-haves with the sales rep for each tool you're considering and have them respond to every line item. There is no one-size-fits-all solution, but knowing where solutions fall short or rise above the rest will help you make your decision.

- Book a demo.
- Start a trial.
- Have your everyday users test possible tools for usability and functionality.
- Connect with customer support or professional services.



FREE GUIDE

**Is your organization in need of large-scale digital transformation? Use our digital transformation checklist to get started!**

**Check it out →**



# Implement Your Software

Once your stakeholders are on board and you've narrowed down your no-code choices, it's time to make things happen! No-code tools are built to be implemented quickly and scale with your organization, so you'll be up and running in no time.

- Identify how you will measure the success of your no-code software implementation. These key performance indicators might include:
  - Number of departments adopting the solution
  - Time saved on workflows
  - Reduced volume of IT support tickets
  - How many workflows are improved with no-code
- Choose a couple of key workflows to test before rolling out your chosen no-code solution to the entire department or organization.
- After testing, identify best practices for creating new no-code workflows.
- Use your no-code champions to show employees within each department how to quickly spin up new workflows.

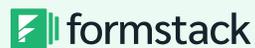
Key Performance Indicators		
KPI #1	KPI #2	KPI #3



## Launch Smoothly

A well-executed launch can make or break the adoption of your new no-code software.

- Test new workflows multiple times.
- Document the entire process from start to finish in simple steps and terms.
- Get users outside the project team to test and provide feedback.
- Designate one person to handle all questions, concerns, and issues.



## Empower your financial institution with no-code

Discover how no-code tools like Formstack make it easy to digitize processes, save time, and do your best work. Quickly automate the processes that matter most to your organization—securely, in the cloud, and without code.

See what the Formstack Platform can do.

**Explore Now →**

