

Data Collection in 2025

Challenges, Risks, and the Path to Smarter Automation

A survey of 400+ data leaders revealing how fragmented systems, manual processes, and security gaps hinder data collection—and why automation is key to solving these challenges.



Executive Summary

Data is streaming into organizations faster than ever, collected by different people, using different tools, for different reasons. Most data collection starts with a clear business need, but as organizations grow, disconnected intake processes create inefficiencies, accuracy issues, and security risks.

Without alignment, IT and data leaders struggle to maintain visibility, enforce security, and ensure compliance—especially with sensitive information flowing through multiple platforms without centralized oversight.

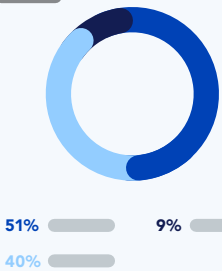
To better understand these challenges, FormAssembly commissioned Regina Corso Consulting to survey over 400 CRM, Compliance, and Data professionals. The findings reveal how organizations collect, manage, and secure data—along with key opportunities to create more efficient, automated, and compliant processes.

Additional Comments

Key Findings

Role/Title*

Please select...



 Your Company

Key Findings

99% see automation as an opportunity

Everyone sees automation as an opportunity to improve data collection—but it’s not a quick fix. Success depends on connected systems, standardized processes, and compliance-ready infrastructure.

98% using manual processes struggle with inefficiencies

Organizations rely on a mix of digital and paper-based collection methods, multiple tools, and varying levels of automation to manage data intake. While respondents are generally confident in their practices, a closer look reveals that those using manual processes are facing real challenges.

80% are experiencing issues with data quality

As data volumes grow and tools multiply, IT teams face mounting integration challenges, and data leaders struggle to maintain visibility, accuracy, and security. Without seamless system interoperability, organizations risk data silos, errors, and compliance gaps.

91% are concerned about data security

It’s no surprise that most respondents are concerned about data security. Yet, despite reporting that half of the data they collect is considered sensitive, significant security gaps remain in their data collection processes.



Foreword

Data is one of an organization’s most valuable assets, yet too often, the way it’s collected and managed creates more risks than rewards. Instead of fueling efficiency and insights, fragmented systems and manual processes slow down operations, complicate compliance, and limit an organization’s ability to put data to work.

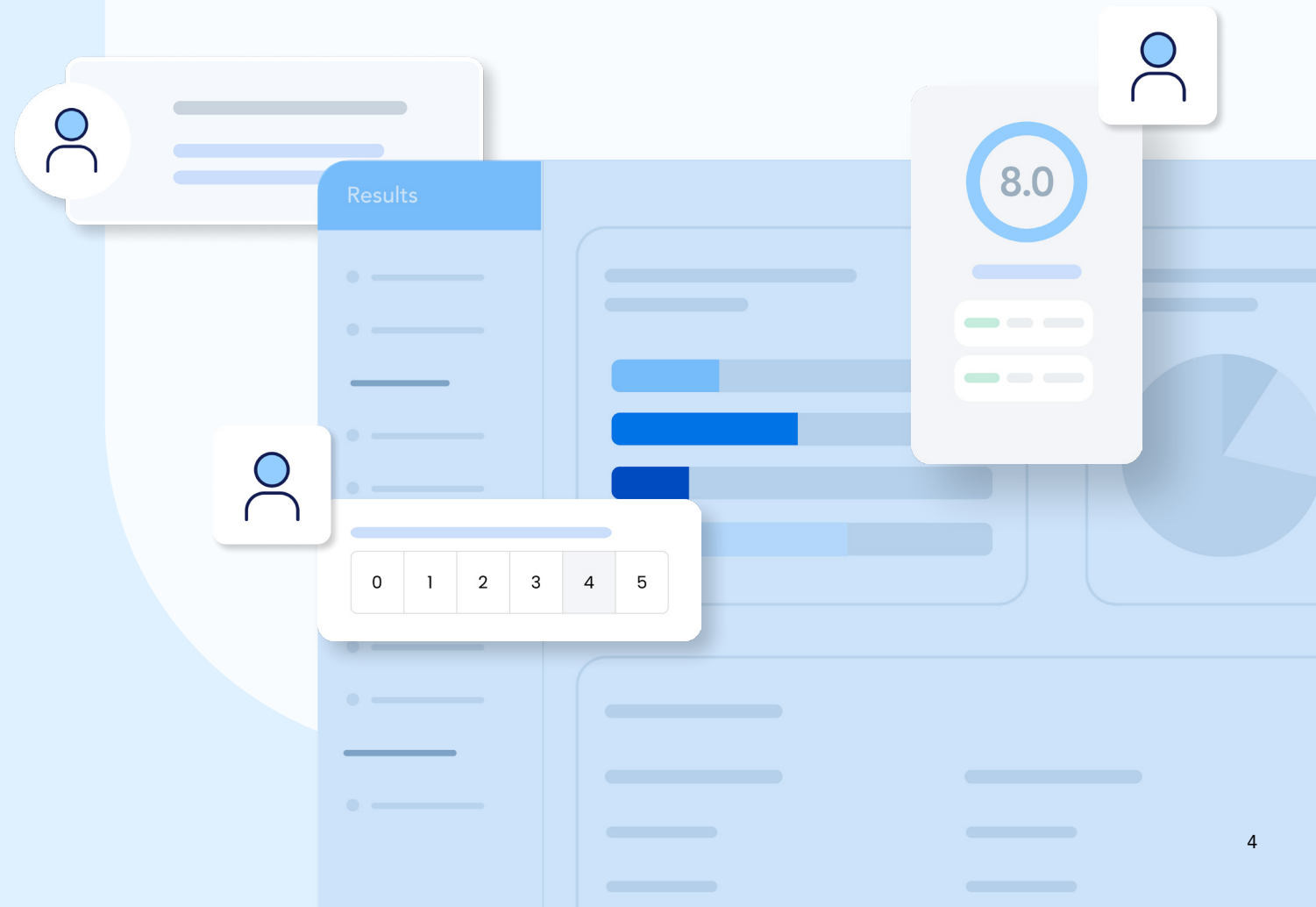
To better understand why data collection remains such a challenge, we surveyed professionals responsible for data intake at their organizations. The findings go beyond numbers—they represent a reality where most organizations are overwhelmed by the sheer volume of data and the people, processes, and platforms meant to manage it. They also reflect real-world struggles, missed opportunities, and aspirations for a more seamless, intelligent approach to data collection.

For many, the goal is greater visibility and automation that simplifies data collection without sacrificing security or control. But getting there requires a shift—from disconnected, manual workflows to integrated, automated processes. This report unpacks the survey findings and explores how embracing automation can streamline workflows, strengthen security, and turn data into the strategic asset it is meant to be.

Tom Urie
President and Chief Operating Officer, FormAssembly

“For many, the goal is greater visibility and automation that simplifies data collection without sacrificing security or control. But getting there requires a shift—from disconnected, manual workflows to integrated, automated processes.”

—Tom Urie



Automation is the Answer

But the Question Is Quite Complex

99% of survey respondents see automation as an opportunity—but implementation is rarely straightforward. For starters, **77% say system limitations and lack of expertise are standing in the way**. And even when automation is in place, organizations struggle to get data into their CRM correctly, typically due to broken integrations or homegrown solutions that weren't built to scale.

Homegrown systems often start as quick fixes but quickly become difficult to scale. As organizational needs evolve, these systems struggle to keep up with growing data volumes and user demands for changes or enhancements. Maintenance then quickly becomes a burden for IT teams that are typically stretched and already juggling competing priorities. The result is inconsistent tracking, mounting technical debt, and a growing risk of errors or data loss as systems age or key personnel leave.

Then there's the issue of ownership. **Without clear alignment on who owns customer data and how it should be managed, teams operate in silos, and policies become inconsistent and often contradictory**. Security and compliance risks rise, and automation fails to reach its full potential.

For automation to be effective, it must be built on a foundation of connected systems, standardized processes, and compliance-ready infrastructure.

Ready to automate?

Here's what organizations need to get right:

Data collection

Establish clear, structured data capture methods to ensure accuracy, consistency, and usability across systems.

Centralize data collection

Connect disparate systems, increase visibility across the tech stack, and ensure data flows seamlessly.

Eliminate redundancies

Consolidate tools, improve integrations, and reduce tech bloat.

Build compliance into the process

Build processes with tools that meet compliance standards from the start.

Automate intelligently

Replace manual processes with automation where it makes sense.

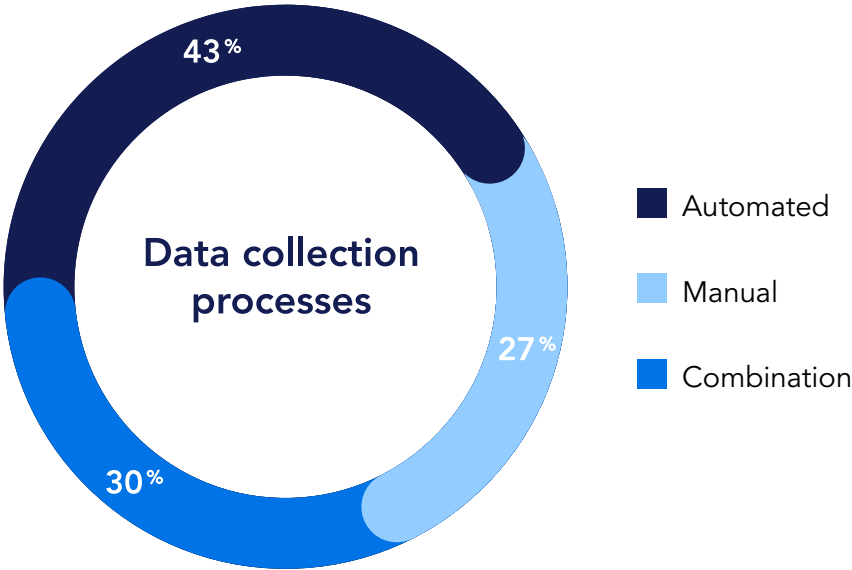
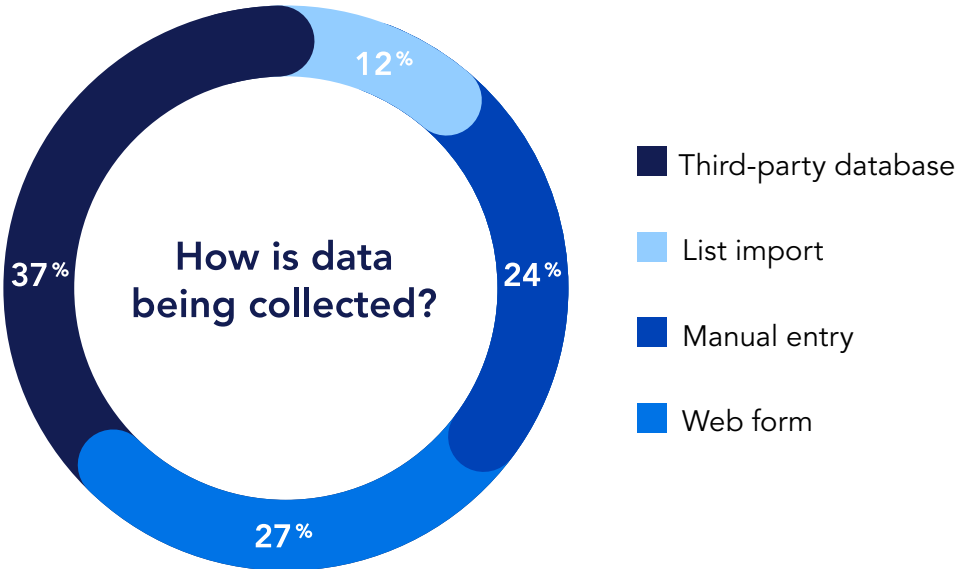
Data Collection

Manual Processes and Silos Slow Organizations Down

At first glance, respondents feel confident in their data collection methods—but **a closer look reveals gaps that slow them down**. That’s because disparate systems and fragmented workflows prevent organizations from fully benefiting from the data they collect.

What starts as a simple fix—a tool here, a plugin there—can quickly spiral into a patchwork of disconnected solutions. Each one addresses an immediate need, but together, they create a fragmented system riddled with inefficiencies, manual workarounds, and compliance risks. Simply put, when systems don’t work together, their value diminishes.

“When systems don’t work together, their value diminishes.”



Data Collection

Manual Processes and Silos Slow Organizations Down

98% of respondents using manual processes in data collection report inefficiencies. An overreliance on manual workflows leads to overburdened IT and development teams. Instead of focusing on delivering value, resources are spent manually entering customer data into a tool like Salesforce—which is built to integrate with other tools that can automate data collection.

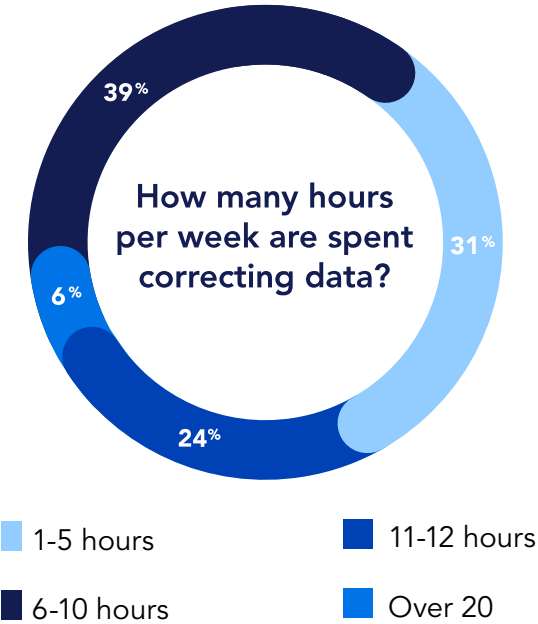
Survey respondents relying on manual processes **lose**

15.2
HRS/WK



Those using automation **reclaim**

10.8
HRS/WK



Challenges with manual processes in data collection



Data Collection

From Silos to Strategy

Who owns your data processes? Too often, no one does—leading to siloed systems, redundant tools, and inefficiencies. Sales may dictate CRM use without considering Service needs, or IT may struggle to integrate disconnected platforms. Without clear ownership, these silos ripple across the business.

Organizations are often shocked by how much tech overlap exists. Mapping platforms, assigning ownership, and leveraging out-of-the-box CRM functionality can eliminate waste and free up resources. Interoperability is key—understanding how tools interact helps streamline workflows and reduce manual workarounds.

At DoubleTrack, we've helped clients **cut process times by 70% by eliminating redundancies and optimizing existing tech stacks.** The right technology—properly integrated and aligned with business goals—transforms how teams work together and use data effectively.



Adam Johnson, Co-Founder and Head of Project Services
Pete Yurchision, VP of AI Architecture, DoubleTrack

The need for centralized data collection

When data is scattered across multiple platforms, tracking becomes difficult, reporting slows, and collaboration suffers. By centralizing data collection, organizations gain clearer visibility, reduce inefficiencies, and improve accuracy—ensuring every team has access to the right information at the right time.

Cut the manual work

Automate data entry, reporting, and admin tasks to save time.

Make smarter decisions, faster

Seamless data flow enables better forecasting and workflow optimization.

Break down silos

Aligned, accessible data keeps teams in sync and eliminates duplicate efforts.

Streamline your tech stack

Remove redundancies, consolidate tools, and reduce wasted spend.

Data Integration

Breaking Down Data Silos

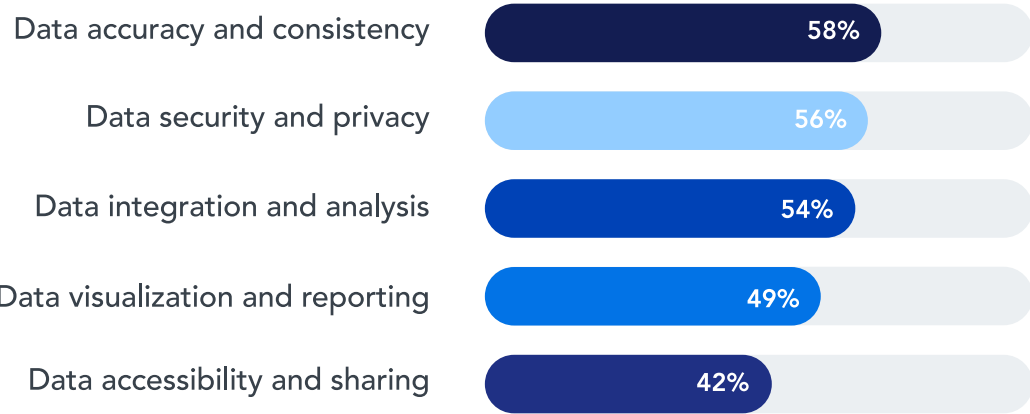
More than half of survey respondents struggle with data integration and analysis, making it difficult to consolidate information and maintain visibility across the organization.

When systems don't communicate seamlessly, data gets trapped in silos—leaving IT and security teams with limited oversight. Without a clear path for data to flow, users get creative, exporting it into spreadsheets and sharing it through email. This not only disrupts workflows but also introduces compliance risks, breaks the chain of custody, and makes audits nearly impossible.

This fragmentation directly impacts data quality.

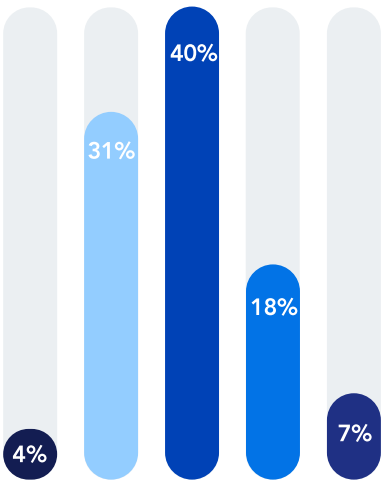
For organizations managing large volumes of customer data in tools like Salesforce, relying on manual data entry to overcome a lack of integrations is neither scalable nor secure. It requires constant cleanup, increases the potential for human error, and forces admins to correct records manually.

80% of respondents are experiencing data quality issues



How many redundancies and overlaps do you have across data collection tools?

- None
- A few
- Some
- Many
- A great deal



Data Integration

Establishing a Single Source of Truth

The value of data hinges on trust—trust that it’s accurate, complete, and accessible. **Without system alignment, organizations spend more time fixing errors than using data strategically.** A single source of truth ensures consistency. If your CRM, form builders, and other tools all feed into Salesforce, then Salesforce should be the standard.

Without this alignment, duplicate records, missing data, and manual cleanup become the norm.

Organizations must first identify where duplicates originate—naming inconsistencies, failed merges, or overlapping accounts. While some records should be merged or removed, others, like parent-child relationships, require clear governance to maintain necessary data while eliminating redundancies.

Structural errors from manual input are also common, making standardization essential. Enforcing validation rules, using Picklists in Salesforce, and aligning form fields help ensure data accuracy upfront.

Lastly, irrelevant data clogs systems and complicates reporting. Strong data minimization and retention policies ensure organizations collect only what’s necessary, store what’s valuable, and eliminate what no longer serves a purpose. **The goal isn’t just to collect data—it’s to collect the right data, in the right way, so it can be put to use.**



Jonathan Payne
Solutions Engineer, FormAssembly

Unlock data integrations

To address these challenges, proper integration between data collection systems is critical. As businesses rely on an expanding ecosystem of apps, automated connectivity and backend integrations have never been more essential. Here are some keys to strive for.

Standardize data collection

Employ a single source of truth across the organization.

Prioritize interoperability in your tech stack

Choose tools that seamlessly integrate with critical business systems.

Simplify data mapping with governance

Standardize data models across systems and implement clear governance rules.

Data Security

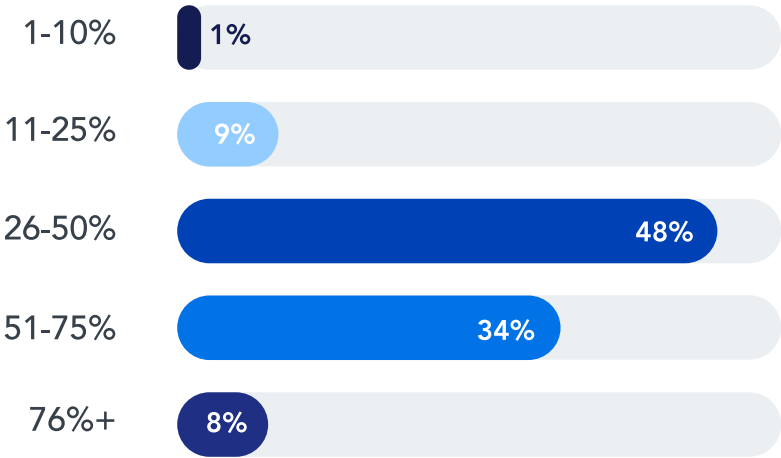
The Growing Challenge of Data Security

Organizations rely on data to drive efficiency, make smarter decisions, and improve customer experiences. But with that power comes responsibility—not just to protect sensitive data, but to be transparent about how it’s collected, stored, and used.

Yet, data security has never been more challenging. Threat actors are becoming increasingly sophisticated, while privacy regulations constantly evolve to keep pace. It’s no surprise that **91% of survey respondents are concerned about data security**. A breach can be devastating—disrupting operations, leading to financial penalties, legal liabilities, and reputational damage. IBM estimates the **average cost of a data breach in 2024 at \$4.88 million**.

Despite these risks, critical gaps remain. **Weak security policies, inconsistent encryption, and a lack of automated compliance controls** create vulnerabilities for bad actors to exploit. Without a proactive, structured approach to security, organizations are exposing both their business and their customers to unnecessary risk.

How much of your data is “sensitive”?



Where do security gaps exist?

- 35%** Lack strong password policies and multi-factor authentication
- 37%** Do not conduct regular security audits and vulnerability assessments
- 42%** Do not encrypt sensitive data
- 50%** Lack data minimization and retention policies



Data Security

Strengthening Security and Compliance at Every Level

“Minimizing risk starts with minimizing what’s collected. If data isn’t providing value, it shouldn’t be collected.”

—David Scovetta

Security isn’t static—threats evolve, vulnerabilities emerge, and safeguards must adapt. A single tool or periodic audit only secures one process at one point in time. **That’s why security must be a continuous, multi-layered effort with safeguards for the safeguards.**

Strong passwords and MFA are essential, but they’re not enough on their own. If credentials are exposed in a breach, password strength alone won’t provide protection. Organizations should use multiple detection services to identify compromised passwords early. For MFA, SMS-based authentication isn’t secure enough—internal MFA combined with multiple verification indicators offers stronger identity verification at every step.

Security requires ongoing evaluation, not just periodic check-ins. Layering internal tools, external expertise, and continuous assessments helps stay ahead of threats. Vendor security is just as critical—third-party weaknesses become direct risks. Organizations should require partners to demonstrate continuous security commitments through audits and transparent compliance measures.

Encryption is only as strong as its implementation. Data must be encrypted at rest and in transit, with protocols regularly reviewed to ensure continuous protection. Assessing external partners’ encryption and key management practices is essential to maintaining security standards.

Minimizing risk starts with minimizing what’s collected. **If data isn’t providing value, it shouldn’t be collected.** Sensitive data must be identified, monitored, and purged when no longer needed. Holding onto unneeded data increases exposure—strong governance ensures information is stored only as long as necessary and remains protected at every step.



David Scovetta

Director of Security & Compliance at FormAssembly

Case Study

Improving Data Visibility in Financial Services

The challenge

Kasasa, a provider of financial products and consulting for community banks and credit unions, relies on extensive data collection throughout the customer lifecycle—from launching new financial products to managing marketing updates and customer relationships. However, scattered data and disorganized processes made it difficult for teams to access and analyze key information. Without a centralized system, visibility was limited, creating inefficiencies and inconsistencies in how data was stored and used.

The solution

To streamline operations, Kasasa turned to FormAssembly and integrated its data collection platform directly with their CRM, eliminating spreadsheets and manual data entry. By centralizing the intake process, Kasasa improved accessibility and organization, allowing its teams to manage thousands of data points efficiently. The result: enhanced visibility, better collaboration, and a more structured approach to client data management.

**200+**

forms in active use

**60-80**hours of work FormAssembly
saves the Kasasa Launch
Team per month

Survey Methodology & Demographics

This survey was commissioned by FormAssembly and conducted by Regina Corso Consulting in December 2024. The survey includes responses from 413 professionals in CRM, Compliance, and Data roles at companies with at least 100 employees, all at the director level or above. Of the respondents, 202 are from the United States, 109 from the United Kingdom, and 102 from Canada. The survey was conducted online between December 10 and 16, 2024.



United States

49%



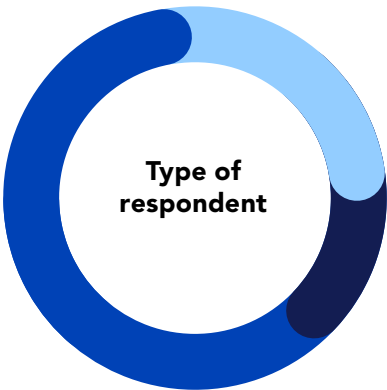
United Kingdom

26%



Canada

25%



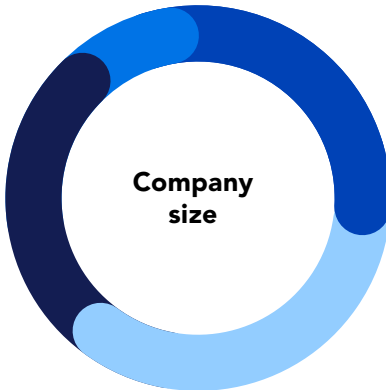
61% CRM
14% Compliance
25% Data



20% 5 years or less
27% Over 10 year



51% Director
40% VP/SVP



29% 100-499 employees
27% 1,000-4,999 employees
34% 500-999 employees
10% 5,000+ employees

Survey Sponsors

About FormAssembly

FormAssembly is a leading forms-based data collection platform trusted by organizations worldwide. Known for its ease of use, enterprise-grade security, and seamless Salesforce integration, FormAssembly empowers businesses in highly regulated industries—such as financial services, healthcare, higher education, nonprofits, and government—to streamline data workflows and maintain compliance.

[Learn More](#)

About Doubletrack

DoubleTrack is a leading Salesforce consulting partner specializing in CRM optimization, data integration, and workflow automation. We help organizations streamline their technology stacks, eliminate redundancies, and enhance system interoperability to drive efficiency and maximize ROI.

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About Regina Corso Consulting

Regina Corso Consulting is a full-service market research firm specializing in opinion polling and strategic insights. With a focus on delivering data-driven intelligence, we help organizations understand their audiences, uncover emerging trends, and make informed business decisions.

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