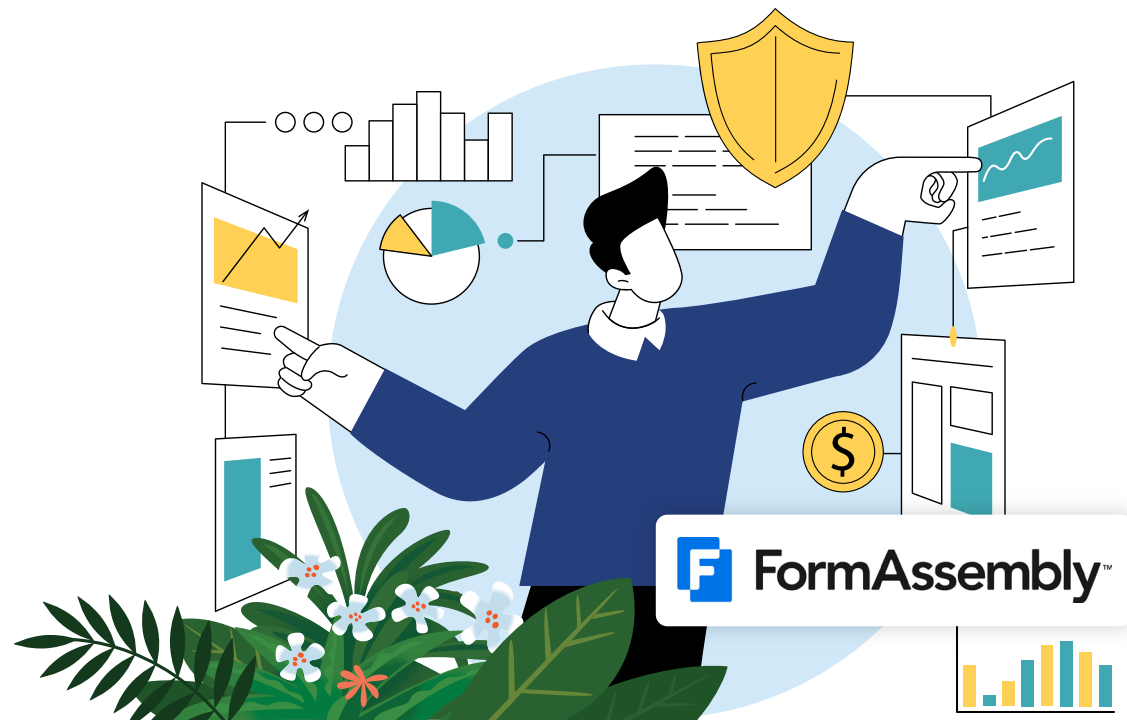


FINANCIAL SERVICES

# Industry Insider



**See how our partner FormAssembly tackles challenges in the financial services industry. From big-picture problems to the needs of a Salesforce admin, FormAssembly has it covered.**

FormAssembly's form builder and data collection platform helps organizations collect structured data, eliminate manual work, and accelerate mission-critical workflows.



**Here's how FormAssembly** helps financial services organizations simplify and automate everything from client onboarding to loan intake to marketing lead capture.



## **Streamline Workflows**

Eliminate manual data entry and automate approvals. Reduce bottlenecks that delay account opening, onboarding, and internal processes.



## **Strengthen Compliance**

Collect and store sensitive data securely with compliance support for GLBA, PCI DSS, KYC, and more.



## **Accelerate Time to Value**

Quickly publish integrated forms that sync with Salesforce in real time. Enable faster rollouts, migrations, and campaigns with minimal IT effort.



**Keep reading to see how a Salesforce admin can effectively execute on initiatives without sacrificing control or compliance.**

# The Solution

FormAssembly's no-code form builder helps financial services organizations respond to stakeholder requests with greater security and efficiency.

## Empower nontechnical users.

**The Challenge:** In many organizations, even small form changes require dev tickets, approval queues, and coordination across teams. This makes it hard to adapt to changing requirements.

**The Solution:** FormAssembly's drag-and-drop builder gives teams the flexibility to create and publish forms in minutes, with zero coding required. Users can modify fields, logic, and styling without breaking integrations or involving IT.



## Automate processes and approvals.

**The Challenge:** Efficiency is mission-critical in financial services, especially when handling client-facing workflows like loan processing or account onboarding. Every delay has the potential to add cost, introduce risk, and cause frustration.

**The Solution:** FormAssembly allows teams to build secure, multistep workflows with automated routing, approval logic, and built-in e-signatures. A new loan application can move fluidly from intake to review to signature. This delights customers and frees up staff to focus on higher-value tasks.



## Easily integrate with Salesforce.

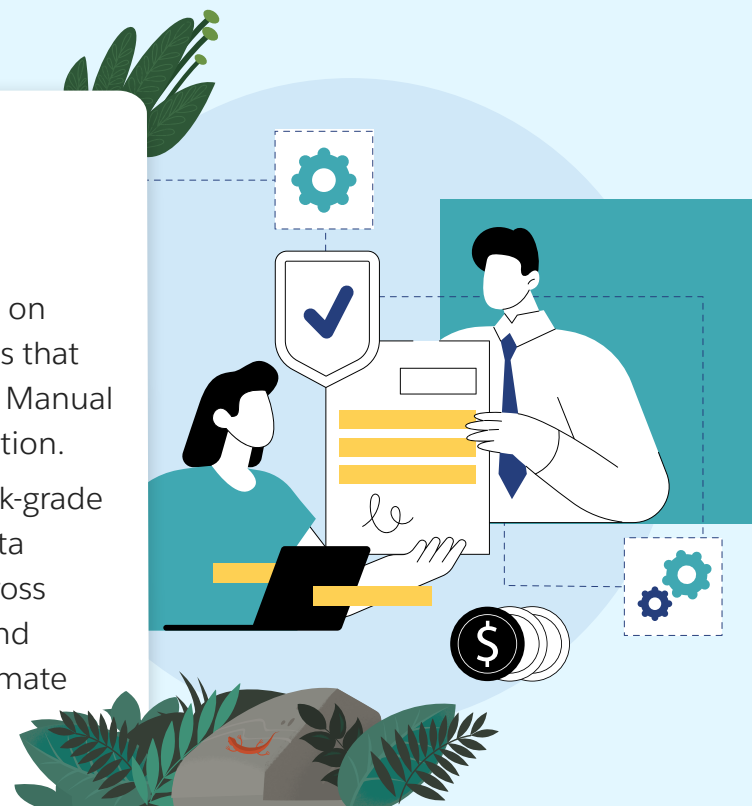
**The Challenge:** Stakeholders constantly request changes, but manually updating form fields, sync logic, or approval routing can take weeks. Errors often leave admins troubleshooting instead of innovating.

**The Solution:** FormAssembly supports dynamic prefill, conditional logic, attachments, complex objects, and bidirectional sync. This means teams can build or update forms quickly to meet time-sensitive launches. Integration with Salesforce helps ensure clean, reliable data delivery to the right records.

## Bolster security and compliance.

**The Challenge:** Many institutions still rely on spreadsheets, PDFs, or outdated form tools that can't meet modern security requirements. Manual oversight adds risk and slows down innovation.

**The Solution:** FormAssembly provides bank-grade encryption (TLS 1.2+, AES-256), secure data storage, audit logs, and access controls across every form. PCI DSS Level 1 certification and GLBA compliance help organizations automate with confidence.



# The Scenario

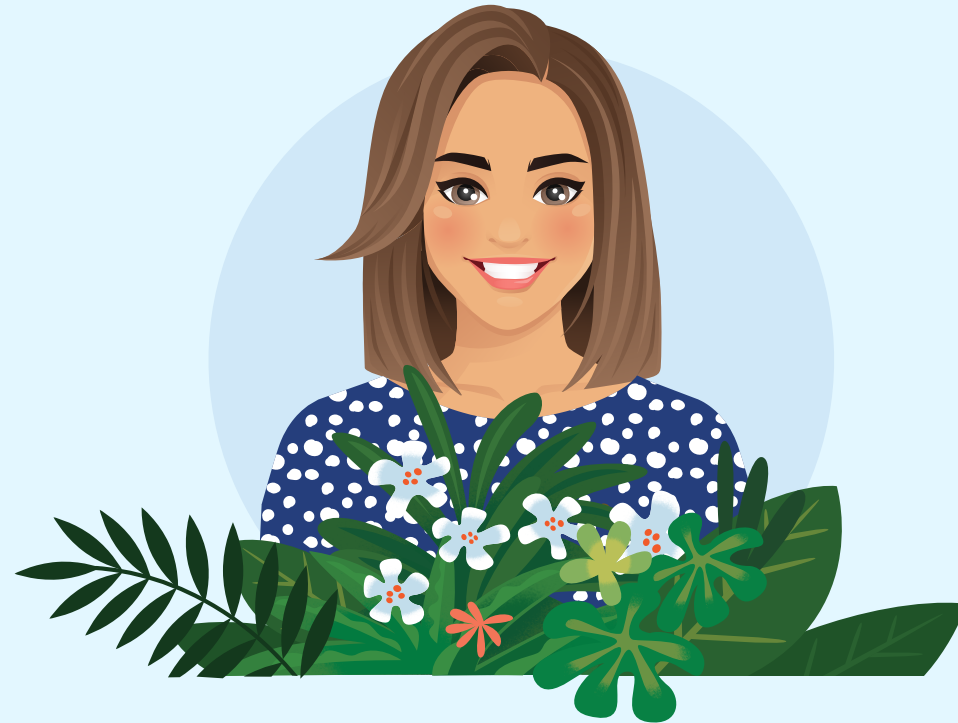
In this example, let's imagine how a Salesforce admin can use FormAssembly to optimize operations and free up resources.

## Lauren Patel

Salesforce Admin

**Lauren manages the Salesforce infrastructure for her midsize investment advisory firm.**

**She collaborates with IT and business operations to facilitate form launches, field mapping, process automation, and data troubleshooting. Lauren supports marketing, compliance, and client services teams by ensuring access to clean, reliable systems and data.**



### Her Goals:

- Maintaining data integrity
- Enabling efficient processes, especially during critical events
- Quickly responding to stakeholder requests
- Ensuring compliance standards are met

### Her Challenges:

- Break-fix work that delays new projects and hinders growth
- Fragmented tools that don't integrate
- Limited access to dev support
- Lack of visibility and control

## FormAssembly solves Lauren's challenges by helping her to:

### Quickly launch and update forms.

FormAssembly's templates and drag-and-drop builder help Lauren create and update forms without IT assistance. Forms integrate directly with Salesforce for cleaner data, faster onboarding, and fewer manual handoffs.

### Reduce errors with automated routing.

FormAssembly lets Lauren build approval workflows directly into her forms. Each step can trigger a Salesforce update or notification, eliminating email back-and-forth. This accelerates processes and gives teams real-time visibility into approval status.

### Support regulatory compliance.

FormAssembly's built-in security features allow Lauren to enforce data access rules, enable SSO, and use audit logs to maintain compliance across all forms. With PCI DSS and GLBA coverage, she can confidently support marketing and client services without introducing risk.

[Learn more about FormAssembly](#)