

# Paul Lazatin, Director of Partnerships, FormAssembly

**Federal News Network: Tell us about your app.**

**Paul Lazatin:** FormAssembly is the most secure, compliant form-based data collection platform in the marketplace. We help organizations of all types and sizes in all industries collect their data safely, securely and quickly. Our mission is to empower them to become good stewards of their data for their customers, which then allows them to send the data that's collected to the mission-critical applications that drive their business.

When I describe what we do, I always ask people, have you been online recently? And have you filled out a form either for information, purchasing something or taking a survey? And almost always people are like, "Yeah, I just did that yesterday. I just did that on my phone." That's what we do. And then we help companies that are collecting that data protect the data that they're bringing in and then quickly get that data disseminated to people or departments in the organization that can use that data in a timely, effective manner.

**Federal News Network: This is primarily a customer insights type thing?**

**Lazatin:** There's a variety of different use cases. There's customer insight. People also use us for surveys, collecting web form data. People use us to collect payments. People use this for request-for-information forms.

If we look at all the verticals that we have, we have a lot of schools that use us, for example. They'll use us for general requests for information, admissions applications, degree request information. That's higher education. For government specifically,

there's a multitude of use cases. People will collect information that has private data in it. Anything that falls under the realm of HIPAA, governments will use our product to collect information about their citizens and share that information with any departments that need to use it.

**Federal News Network: Talk about why government organizations should use your app for this specifically.**

**Lazatin:** Specifically, we're the most secure and compliant platform in the entire marketplace. That is how we go to market, that's what we pride ourselves on: being good stewards of our data, being thought leaders in that space.

Government organizations should use us because, doubling down on the security and compliancy, we're tailored for highly sensitive data. We're built for that. We hold the distinction of being the only FedRAMP-ready platform on the marketplace in this category. We also hold SOC 2, ISO 27001, PCI DSS and GDPR compliance. And really, what that means for our customers and partners is that



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we're experts in this space, and that will mitigate any risk and collecting data for your organization, whether it's here in the United States or abroad.

As a matter of fact, our founder is actually from France. And so when he came over, he recognized the need to make sure that we're being compliant because we realize that we have customers that have customers and members in different parts of the world. We pride ourselves on making sure that not only do we maintain all of those compliance protocols that I just shared but also making sure that we're educating our customers and our partners on why that's important – and then how to best leverage that for the business organization.

### **Federal News Network: What are the benefits your company's received from being in the AppExchange?**

**Lazatin:** First of all, it is the premier marketplace for Salesforce. Those are the primary beneficiaries of our form builder because of our tight-knit integration with Salesforce. It just makes it a really easy way for people that have a problem, that need a solution. And it's a really good way for them to just go to a single place where they can take a look at each individual app and then see what is going to best suit their needs. So that's a primary benefit, just having a central organized place for people to look for solutions.

A couple other benefits are increased generation for people that need our products, and the ability to just get in touch with the organizations that need us, that are in need of a user-friendly, secure, no-code, low-code, form-based platform.

And then the last thing I'd probably say for AppExchange is people can easily find us, if that makes sense. Sometimes, you'll just do a Google search. You'll just type in something like "secure data," and you'll get a whole bunch of search results returned. By being on the AppExchange, it allows us to have a fully vetted marketplace with educated

participants and then have them easily find us, contact us and learn a little bit more about what we do, so we can talk to them about how we might help their organization.

### **Federal News Network: What's unique about FormAssembly's integration and its benefits?**

**Lazatin:** I get that question a lot. So doubling down on the security aspect, we are the most secure, compliant platform in the marketplace. I think what's unique in the integration of the benefits is, of course, the security aspects.

We have a number of different plan offerings and levels that go up in security. We have yet to find a situation where we haven't been able to really answer somebody's security requirements.

And then as it relates to the connector, we've got a best-in-class Salesforce connector. What this means is, it makes it really easy for all types of roles in the organization to just get the data safely and securely, and then put it wherever they want and choose to in their Salesforce organization. That way, their administrators, their end users or customers – all of the parties that are involved – can really make use of that data in a timely and effective, efficient manner.

What's great about it is that the connector is bidirectional, meaning that I can pull information from Salesforce and prefill any of our forms that are going out with that, basically making the customer experience much, much better.

As a matter of fact, we solved the problem where you'll be filling out a form and then you'll ask yourself, "I swear I've given this company this information before. Why are they asking for that information again?" We help solve that problem and just make it really easy for your surveys to get completed because there's no form fatigue because you're asking the same questions over and over again. It's a really good way to send out stay-in-touch forms.

What we can do is we can send out name, address, contact phone number information, and the respondent can then vet that information and say, "Oh, you know what, my phone number has changed." And they can easily change their phone number, and it seamlessly goes back to Salesforce, checks the record, and then amends and updates that accordingly. That's a big benefit, the bidirectional connection with Salesforce.

Going back to this idea of being able to get the information exactly where you want it to go, it's a big boon to our partners who we work with. Because a lot of times, they'll say, "You know what, we had to alter the way that our Salesforce org was set up because we couldn't get the information where we wanted to." We solve that problem for them.

Then the last thing that I want to share as it relates to the government specifically is multilingual forms. We support multiple languages, over 40 of them on each of our forms. Especially for the government, it's really important that you're serving the needs of all of the citizens in your country, regardless of whether English is a primary language or not. And that resonates very much with me because I'm second-generation immigrant.

I remember getting here and having my parents really benefit from being able to really, truly understand what is on a government form. To be honest with you, sometimes I'll read a government form, and I'll be like, "I really need to reread that. Make sure that I understand what's happening."



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## Federal News Network: Can you offer some real-life use cases?

**Lazatin:** A use case that I like to share is from the county of Multnomah. I live in Portland, Oregon, in the county adjacent to Multnomah. Multnomah County is where Portland Metro proper is. It serves over 800,000 residents in Portland Metro alone.

The real-life example that I want to share is the entire county uses our platform across different departments. And that's one of the things that I find really cool because when we first got them as a customer, they had one department that was using it. And then as the form started to be shared across the organization, other people from accounting, from public works, from civic service, all the way to the court system said, "How did you build that? And how are you getting that into our Salesforce system so easily and so organically?"

Working with our wonderful customer success team, they shared all their use cases and were able to share how not only they built the form but also how to set up the connectors to send the data that they want to into Salesforce.

As of today, we serve over eight different departments. The challenge they were really looking to solve was how to scale this initiative and this application as rapidly and easily as possible. We were able to help them build out the forms really quickly. It's a very intuitive interface.

They have people that have experience in Salesforce building forms, people that don't have experience in Salesforce building forms, people that work for literally different departments that probably don't even interact with each other on a day-to-day basis, all using the same platform, all vetted by the same security team for the county.

Because we were able to build so many forms so quickly, it led to a reduction in manual data entry by 75%. A lot of the way that they were doing this

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before was getting the information, and people were hand-keying this information in, instead of having the connector put it directly into Salesforce. So can you imagine how much room for error we were able to solve and really mitigating that risk of making sure that we're collecting the information securely, and then disseminating it securely and efficiently.

When we talked to the people that work in the county, they said, "You gave us time to put back into the community. It's a lot easier when I can go into Salesforce, and there's not duplicates or errors." And then also, somebody said they were just happier. They were just much happier because "this process was so time-consuming before that I can do other things now."

There are over 125 users in the county and a couple of different use cases, like Women, Infants and Children Program (WIC) eligibility. This is when it's really important to make sure that a form is accessible to as much of a broad audience as possible. So, residents of Multnomah will go in, they'll apply for WIC benefits through our forms. They are able to connect different forms together, which is really important, especially in a government deployment because you want to make sure that you're asking for the right information and then passing the relevant pieces on to different people that need to ask more questions. Because it has to touch so many different departments, accessibility is really key.

Also, on that same form, we actually also collect payments too. So, within the same form, you

can collect all this information, send it over to Salesforce, and at the same time, collect the payment that you need to take the next step.

And then another use case that I want to talk about is a water test kit request. I love talking about this one because literally everybody needs to use this form. It's a form that you fill out to get a testing kit that the county provides so that people can test the lead content in their water and report it easily back to the county so somebody can do something about it.

I don't know if you have ever been to Oregon, but it never rains here. No, I'm joking, it always rains here. And so it's really important to make sure that the runoff from different places that goes into our drinking water is safe. And we need to be able to get a test kit out to people. The county uses FormAssembly for that – and it is also multilanguage.

And finally, here are a few more. We help with pollution complaints. There's a form for people to tell the city about something that they're concerned with as a citizen. That falls under that general request for information. And then event program registrations – a lot of people use that for registering people for events run by the county. The court system actually uses us for a program to support people that are in the process of getting divorced. Now, obviously, that's not a happy situation. But what we can do for them is they can actually register for classes that can help them through that really arduous process. And we can collect the payments to help the county support continuing to offer those classes. All of those are done with our forms, and I'm really proud of that.

## Federal News Network: Is there anything else that you want to share?

**Lazatin:** I want to share just how awesome the FormAssembly culture is.

We were fully remote before the pandemic started, and because of that, we have a breadth of talent from all over the globe. That really helps us with all of our customers. Because we can speak to the different things that we see every day in our environments, because we have customers all over the place, and everybody has different needs. We are purpose-built from the ground up to be remote.

As to our view on the data space, it starts with our founder, Cedric Savarese. He is very big on data stewardship and making sure that people are controlling their data. Really the key takeaway there is that our mission is to truly empower people to become true stewards of their data.

We take it so seriously that everybody at the company has to take mandatory training on a monthly basis for security. We're always up to date on security protocols, and then we use the tests to make sure that we understand how best to keep our data secure, because anything that we collect on behalf of our customers is paramount to what we do as a company and as our mission. 🚀

❖ **Read more about how FormAssembly helps government agencies tackle challenges in this Salesforce AppExchange partner guide.**