



DIGITAL FORMS

Replace PDF and paper forms with intuitive digital workflows



Forms play a critical role in converting sales, enrolling new customers and providing valuable services. Yet many businesses still rely on slow manual processes and static documents that lead to endless back-and-forth and high rates of customer abandonment.

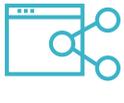
CallVU enables organizations to take control of complex customer processes by transforming them into efficient digital journeys that are intuitive and easy to complete.

Automate Customer Processes

CallVU Digital Forms allows you to create responsive digital workflows that customers can complete in self-service or with live agent assistance right on their phone. Build new forms in a no-code, drag-and-drop environment or easily convert legacy PDF and paper forms to deploy in digital channels. Allow customers to quickly fill and sign, upload supporting documentation and even complete a form across multiple sessions without losing data.

Whether the objective is to convert a sale, accelerate enrollment or provide proactive customer care, Digital Forms can streamline processes that previously required multiple interactions so they can be completed in a single session. By simplifying a wide range of customer-facing processes, brands can achieve superior results across sales, support and operations while dramatically improving the customer experience.

Solution Capabilities

 Simplify customer onboarding	 Automate service tasks	 Capture digital signatures
 Simple drag and drop functionality	 Convert legacy forms	 Share forms across digital channels
 Upload scanned docs and images	 Publish forms in any format	 Save & continue later functionality

BENEFITS

No Developer Needed

Anyone can create digital forms with our no-code, drag and drop builder and purpose-built templates.

Convert Legacy Forms

Easily convert existing static forms into multiple digital formats.

Dynamic and Responsive

Provide an optimal experience across web, tablet or smartphone, publish as web forms, mobile wizards or PDFs depending on need.

Secure

Save and transfer forms with masking capability to ensure important data remains secure.

Single-Source Publishing

Create a form once and publish it to multiple digital channels for a consistent experience regardless of where forms are accessed.

Agent Assisted Completion

Digital Forms can be integrated with the CallVU Collaboration portal, allowing agents to complete forms with customers to reduce errors and maximize completion rates.

CallVU Digital Forms works seamlessly with all of CallVU's Digital Call Experience solutions: Visual IVR and Collaboration.

Transform Customer Engagements

CallVU Digital Forms is ideal for enterprises seeking to transform customer-facing processes to dramatically improve the quality and efficiency of customer engagements. Organizations can transition from paper or rigid PDFs to a fully dynamic form generation and distribution tool. Deliver forms to customers on any device and in any channel, even during a live call. Turn time-consuming applications, claims, orders and onboarding into coherent digital process that can be easily completed in real time.

Single Source Publishing



Features

- No-code, drag and drop form builder
- Convert existing forms or create new ones
- Wide variety of editing capabilities
- Flexible styling for a branded experience
- eSign capability, supports multiple signatories
- Upload supporting documentation and images
- Instructional tips to guide users to completion
- Conditional field visibility
- CRM synchronized auto-fill
- 'Auto-save and continue later' functionality
- Upload a drop down list of field value options
- Accessibility enhancement for visual impairment

Technical Specifications

- Web service installed on premise or on cloud
- Publish forms to any client-managed web services
- Runs on secure multi-layered architecture

About CallVU

CallVU is reimagining the call center with the industry's first, end-to-end digital call experience. CallVU transforms the call, uniting voice and digital to empower customers and agents with a better way to get things done. With CallVU, companies unlock efficiency and value across the entire call center experience to better meet customer needs, lower costs and generate more revenue.