

# Forms

*Streamline the way you collect data*

**Forms** streamlines your processes by transforming PDF questionnaires, applications, and other insurance forms into user-friendly online forms, saving valuable time for both staff and policyholders.

## How It Benefits Your Business

### Elevates Your Customer Service

Empowers policyholders with a seamless digital journey, featuring user-friendly elements like auto-fill, conditional questions, and page-skip logic for efficient form completion.

### Reduces Turnaround Time

Streamlines submission with a single click, ensuring swift returns of applications and forms compared to traditional methods like mail or fillable PDFs.

### Seamless Integration with AMS/BMS

Sends key data back to your AMS/BMS for better data analysis, less data entry and reduced E&O exposure.

### Tailored Branding Options

Tailor the platform to align with your brand identity by adding your logo, adjusting fonts, or modifying template colors.

### Dynamic Questionnaires

Tailor forms dynamically by incorporating customer and policy details, utilizing merge tags, and incorporating custom questions for specific coverage needs.

### Upsell Opportunities

Capture insights into additional product interests, enabling proactive follow-ups to enhance upselling opportunities.

### Core Features

- Unlimited Forms
- Premade Mobile - Friendly Templates
- Integrate with Automated Journeys
- Create New Segments Using Responses
- Secure Client Sign-In from Email
- Form Auto-Complete
- Conditional Questions
- Dashboard with Analytics
- Trackable for E&O
- Push Form Data Back to AMS/BMS\*
- Exportable Reports
- Setup Completion Alerts for CSR's

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## Examples of Insurance Forms You Can Create with Forms:

- Pre-Renewal Questionnaire
- Application for Home-Based Business
- Sewer Backup Questionnaire
- Solid Fuel Questionnaire
- Winter Tire Questionnaire
- Personal Lines Property Oil Tank Questionnaire
- Vacancy Questionnaire
- Home Daycare Questionnaire
- Rented Dwelling Questionnaire

### Why Choose Pathway?

Pathway delivers cutting-edge insurance automation tools tailored for progressive agencies in the United States, Canada, and the UK. Anticipating industry trends and responding to evolving client needs, our intuitive cloud-based software is designed to propel medium to enterprise - sized brokerages to success.

### Need Help Creating Your Online Forms?

*If your team is pressed for time Pathway offers full-service online form creation. Our talented team can take care of everything including design & technical setup. Please talk to your success manager if you have any questions.*

