



# HOW WE **AUTOMATED** CUSTOMER **DATA COLLECTION** FOR OUR TAX SERVICE CLIENT BY INTEGRATING **MS FORMS** WITH SUGARCRM

*A Case Study on how we developed an automation plugin for Microsoft Forms inside SugarCRM to automate customer surveys and reduce manual workflow process for our tax service client.*

## KEY METRIC

The data collection process was automated and integrated within SugarCRM.



**Auto-synced data in forms and CRM**

## SUMMARY

Our tax service client faced challenges with the efficiency of their case advocates, who were expending valuable time and effort on manual customer data collection. To address this issue, we developed a custom plugin to automate the process. This plugin seamlessly integrated with their CRM, enabling the creation of Microsoft Forms and automatic collection of responses to populate customer data fields

## BUSINESS CHALLENGES

The case advocates at our tax service client's organization previously utilized Google Forms for gathering responses from customer surveys, questionnaires, and data collection. Their process involved emailing the form link to customers, and subsequently, manually copying and pasting each response into the CRM. While the creation and updating of forms were straightforward tasks, the manual data entry into the CRM proved to be a labor-intensive bottleneck. To enhance their workflow efficiency, our automation experts embarked on a solution.

## SOLUTION PROVIDED

The experience of MS Forms is better than Google Forms, so we integrated it with SugarCRM. This integration not only allowed us to create survey forms but also enabled us to seamlessly distribute them to customers directly within the CRM platform. Utilizing the newly implemented 'Questionnaire Generator' tool, our client gained the ability to craft various types of forms tailored to specific surveys.



### **Elimination of manual data-entry errors**

Additionally, we developed a plugin that streamlined the process further. With this plugin, our client can easily select a customer, choose a language, specify the form type, and submit it to send an email containing the form link to the customer.



### **Time-saving as all operations occur within SugarCRM**

The centrepiece of this automation effort revolved around the survey module, which efficiently collected response data from the forms. Subsequently, this response data was automatically synchronized with the corresponding fields in the CRM associated with the specific form type.



### **Auto-synced data in forms and CRM**

## **IMPACT ON BUSINESS**

---

The automation swiftly eliminated the time and effort previously expended on manual workflows. The data collection process and survey administration were significantly streamlined, and seamlessly integrated within the client's SugarCRM portal. The risk of human error, which was prevalent during the manual copying and pasting of responses, was entirely eradicated. This enhancement allowed the case advocates to redirect their efforts towards deriving valuable insights from the responses and assisting customers in resolving their tax-related issues through our automated customer data collection system