

## Mobile Forms Streamline Forum

## Registration for The Connex Group

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— David Martinelli, Partner, The Connex Group

The Connex Group is a business information consulting company headquartered in New York City that helps clients in healthcare, human capital, benefits, legal and corporate finance to achieve their strategic and tactical goals. An important point of differentiation for the firm is their targeted approach to networking and problem solving, which connects clients to key decision makers and resources within their industries.

To accelerate and strengthen these independently vetted pools of knowledge, The Connex Group regularly holds Sector Meetings and Private User Forums throughout the U.S. where industry leaders come together in person.

The Connex Group found that making it easy for their time-crunched C-suite executive Members to fill out their travel and registration documentation was a challenge.

Prior to engaging with doForms, attendees were receiving fillable Word or PDF documents from the operations department. Many had to print the documents, fill them out by hand, scan them and then upload them back to The Connex Group.



**THE CONNEX GROUP**  
Connectors · Relationships · Results

### **Description:**

The Connex Group is a unique business information consulting company, committed to helping their clients achieve their strategic and tactical goals through exceptionally cost and time-efficient processes.

### **Website:**

[www.theconnexgroup.com](http://www.theconnexgroup.com)

Responses were often delayed as a result and required the Sector Meeting organizers to collect and categorize responses manually much of the time.

### **A Streamlined Approach**

Finally fed up with this “clunky” approach, The Connex Group ran a trial of doForms mobile forms for their registration process. A mobile forms consultant from doForms helped the meeting director build a few sample forms and then showed her how to build and modify them herself going forward. In less than a day, they had forms ready for all of their events throughout the year.

The new doForms now get emailed as embedded links with thumbnail images that lead the Members to mobile forms housed in the cloud. That enables the C-suite executives and their staff to complete the forms wherever it's most convenient – at the office, on their phones or at home. All they need is an Internet connection and their favorite browser.

Submission is instant, data is accessible in the cloud by all event organizers in real time and the information is secure throughout the entire process. The Connex Group even has the ability to push registration form updates out at any time.

### **Better Equipped for Growth**

Clients of The Connex Group have embraced the new mobile forms solution. Since the changeover to doForms, response time and data inaccuracies have been dramatically reduced and Connex staff has more time to focus on other mission-critical tasks.

The Connex Group partner David Martinelli calls it a game changer: “This solution makes much better sense than what we had. doForms has certainly been received a lot better. This will avoid the errors we were seeing, thus improving our deliverable and the client experience.”



“doForms improves the registration experience for our attendees and reduces errors. It makes perfect sense for pennies cost.”

— David Martinelli  
Partner, The Connex Group



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