EBOOK

5 ESSENTIAL DIGITAL FORMS FOR YOUR
BEAUTY & WELLNESS
BUSINESS

Revolutionize your processes
with digital forms

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Choosing the Right Digital Solution for your Beauty & Wellness Business
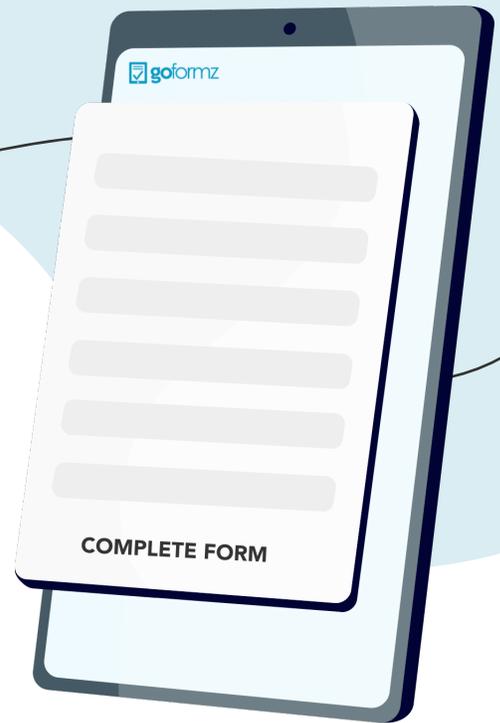
The beauty and wellness industry spans a wide array of product and service offerings. From hair salons and local gyms to global makeup stores and cosmetology schools, introducing digital solutions can add immense value to your business!

Dive into the future by implementing digital tools to improve productivity, customer experience, and operational logistics. GoFormz is the only digital and online form platform available that preserves the original look and feel of your existing paper forms – allowing your business to streamline user adoption, preserve formatting requirements, enhance customer engagement, and so much more.

Whether your beauty and wellness business uses a personal training intake form, inefficient paper invoices, or an aged call-to-schedule appointment method, GoFormz is your one-stop-shop for all of your operational needs. Our digital form solution presents beauty and wellness businesses with a powerful resource for improving productivity, efficiency, and customer care, by:

» Eliminating paper forms and physical record-keeping
» Removing manual form delivery with access to forms online
» Ensuring critical forms, data, and authorizations are collected
» Accessing forms and data in real-time
» Automatically filling connected systems with form data

Within this eBook, we'll explore some of the most popular digital forms used today in GoFormz for the beauty and wellness industry, features and fields that can be used to boost your data collection further, and additional resources to help kickstart your digital transformation within your beauty and wellness business.
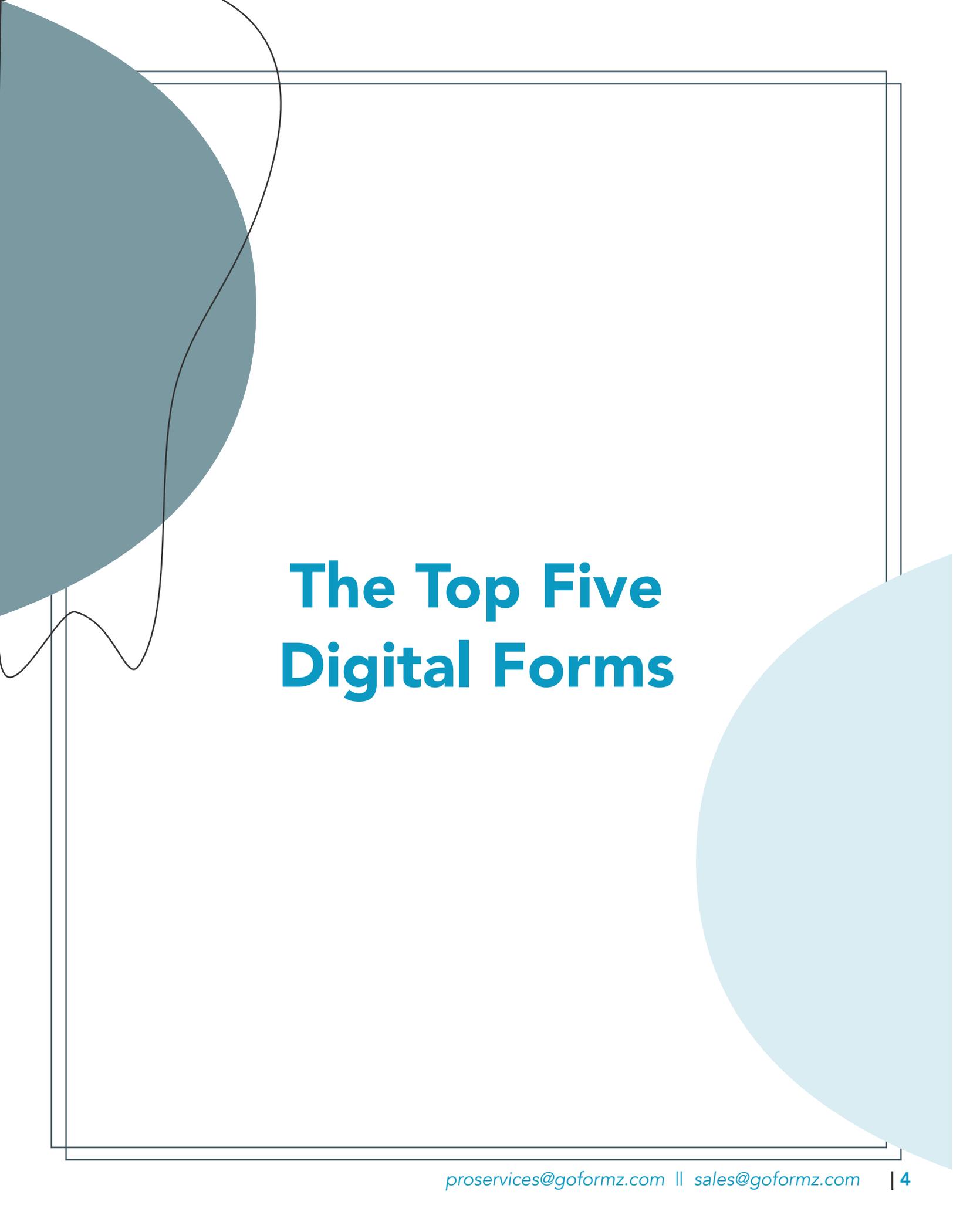
The Top Five
Digital Forms

Appointment Request & Client Intake Forms

Online forms present beauty and wellness businesses with a variety of opportunities to accelerate client intake processes. Using our *Public Forms* feature, links to your online client intake forms can be posted to your business website or shared with clients directly via email. This allows new customers to easily input and submit their information from any location well before their scheduled appointment time. Use digital client intake forms to quickly collect a new customer's name, contact information, and appointment details, then route that data to connected databases, applications, and more.

Implement *Drop Down Menus* in conjunction with *Datasources* to give your clients drop-down lists with pre-populated details, further accelerating and simplifying the new client and appointment request process. For example, a new customer filling out a spa intake form might have a specific service they want to receive. Using a *Drop Down Menu*, they can select their desired service, and the corresponding employee's information would auto-populate along with available dates and times for their appointments.

Once submitted, your forms can be instantly routed to administrative teams or the employee selected for the service – streamlining communication and intake procedures. This is accomplished using an *Automated Workflow*, which can instantaneously route client intake forms to a predetermined email or an email entered within the form.
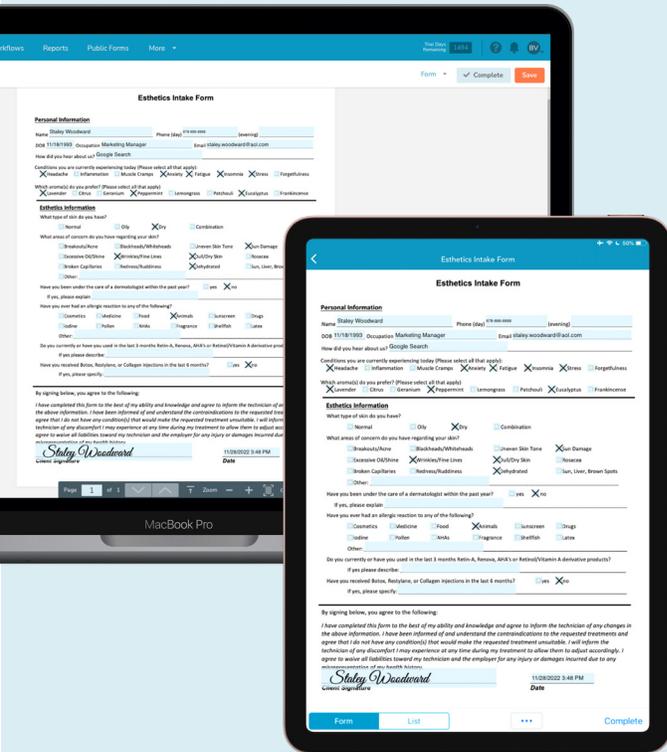
Key Features
- » Public Forms (Template Based)
- » Integrations & Open API
- » Automated Workflows

Key Form Fields
- » Drop Down Menus
- » Datasources
- » Database Field
- » Checkbox Fields

Waiver & Release of Liability Forms

Protect your business and minimize risks with secure, efficient digital waivers and release forms. Digitizing your business' waivers ensures staff members and clients better understand: any associated risks and rights being waived, the responsibilities of participating parties, any legal considerations vital to both the business and participants, any health and safety affirmations, and much more!

Efficiently capture legally binding participant and/or guardian signatures with *eSignature* fields. *eSignature* fields can even be made *Required* to better ensure accurate, complete documentation prior to any appointment or procedure. Leveraging additional *Dynamic* fields, form fields can be *Hidden* and become *Visible* based on *Conditional Logic* set on the form. For example, if a minor is completing the form and sets their birthday as younger than 18 years old, the guardian information section can become *Visible* on the form and made *Required* to complete before submitting the form.

Finally, for those beauty and wellness businesses that must adhere to HIPAA privacy requirements, GoFormz offers HIPAA-secure digital and online forms at the enterprise subscription tier. With customizable account settings, GoFormz can provide detailed audit trails, HIPAA and E-SIGN Act compliance, and automated completed form copies sent to desired recipients. As with any software platform, always confirm your adherence to local, federal, and industry regulations with a trusted business advisor or attorney.
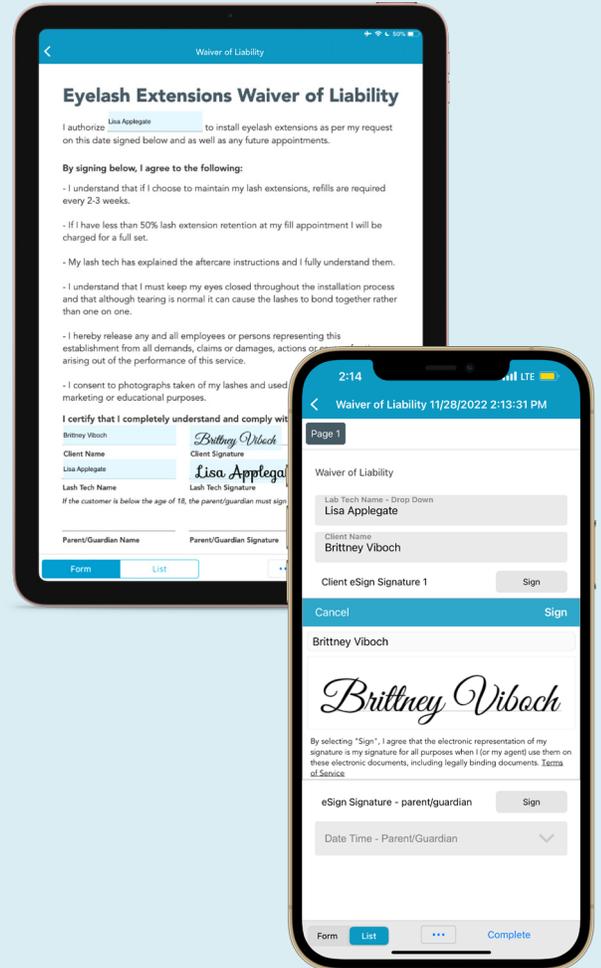
Key Features
» Automated Workflows
» Conditional Logic
» HIPAA-Secure
» Public Forms (Single-Use)

Key Form Fields
» eSignature Fields
» Required Fields
» Hidden/Visible Fields

Consultation Forms

Digital consultation forms make it easy for clients to inquire about services they are interested in but not yet ready to schedule. Digital forms accelerate the completion, processing, and review of consultation forms, allowing your beauty and wellness business to improve agility and respond to client consultation requests faster. Let your clients request a consultation from anywhere, on any device, by linking to your digital consultation from from your website. And unlike paper forms, digital consultation forms allow you to review requests and client information in real-time.

Equipping consultation forms with *Checkbox Groups* allows form users the ability to quickly and easily select the checkbox information that pertains to them. This feature greatly simplifies the collection of information into a digestible form and expedites the data collection process. *File Attachments* or *Image* fields can be used to add further context to consultation forms. For example, for a hairstyle at a new hairdresser, a photo can be used to illustrate the client's current length, color, and hair condition. Alternatively, clients can also show the stylist what services they're interested in – further streamlining client communication.

Once the consultation form is completed, *Automated Workflows* can be used to send the completed PDF to the corresponding team member. For example, if a client is requesting services for a massage that consultation form would go to the massage therapist, while a facial consultation form would go to the corresponding esthetician.
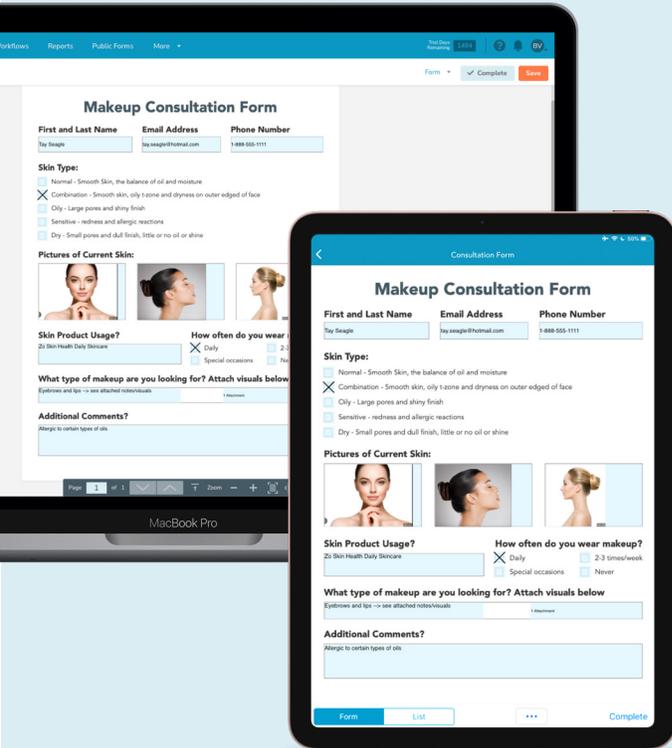
Key Features

» Public Forms (Template Based)
» Automated Workflows
» Integrations & Open API

Key Form Fields

» Checkbox Groups
» File Attachment Fields
» Image Fields

Client Feedback Forms

Digital client feedback forms not only provide a more professional, modern experience but also allow businesses to review submitted feedback in real-time. Immediate access to customer comments and concerns allows your team to respond to opportunities and obstacles in a timely and detail-oriented manner. With data types like *Images, Likert Scales,* and *Conditional Logic,* customers can add context to submitted feedback that traditional PDF and paper forms can't capture.

Using the GoFormz *Public Forms* feature, a link to your digital client feedback form can even be shared with people outside of your GoFormz account. This means that your client feedback form can be hosted on your company's website, emailed to customers, and more. Once completed, a PDF copy of your client feedback form can be automatically routed to management, streamlining communication and increasing transparency.

Finally, using the GoFormz *Reporting Tool,* scheduled reports can run across all collected client feedback data to better identify trend analysis and make informed business decisions from actual client feedback.
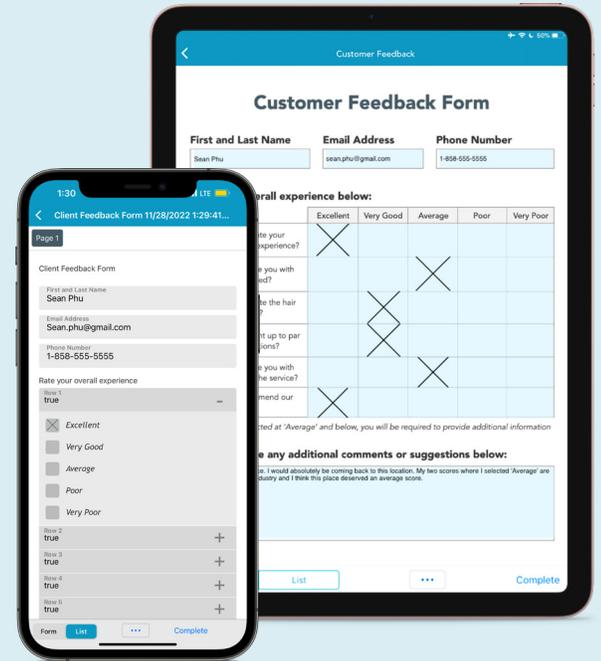
Key Features

- » Reporting Tool
- » Public Forms (Template Based)
- » Automated Workflows

Key Form Fields

- » Likert Scales
- » Image Fields
- » Table Fields
- » Checkbox Groups

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Cleaning Checklists

Whether you're a small salon or a global enterprise wellness company, having a clean environment to work in is imperative for customers and employees. Cleaning checklists are an easy way to standardize cleaning practices and rapidly distribute guidance to employees. Utilizing digital forms, your business can easily build intuitive, interactive cleaning checklists, detailing each of the critical tasks that must be completed in order to ensure proper protocols are being followed.

Data type fields can add immense value to digital cleaning checklists. Using *Checkboxes*, your team can quickly note which tasks have been completed. For example, cleaning door knobs and surfaces, or cleaning the hair off the floor from a haircut. Incorporating *Timestamps* onto the form, users can easily enter when they completed a cleaning task. Additionally, this field can be automatically populated with the current date and time when a *Checkbox* has been marked complete to confirm data accuracy and streamline data collection. Unlike paper forms, your team can also include annotated photos for details of any issues they encountered, or to keep a visual record of maintenance status.

Finally, using digital *Signature* boxes, employees can sign off that they have completed each of the tasks listed within the cleaning checklist. If an issue were to arise at a later time regarding the completed tasks, your business can easily reference who signed off and completed the checklist – supporting better communication and accountability for your whole team.
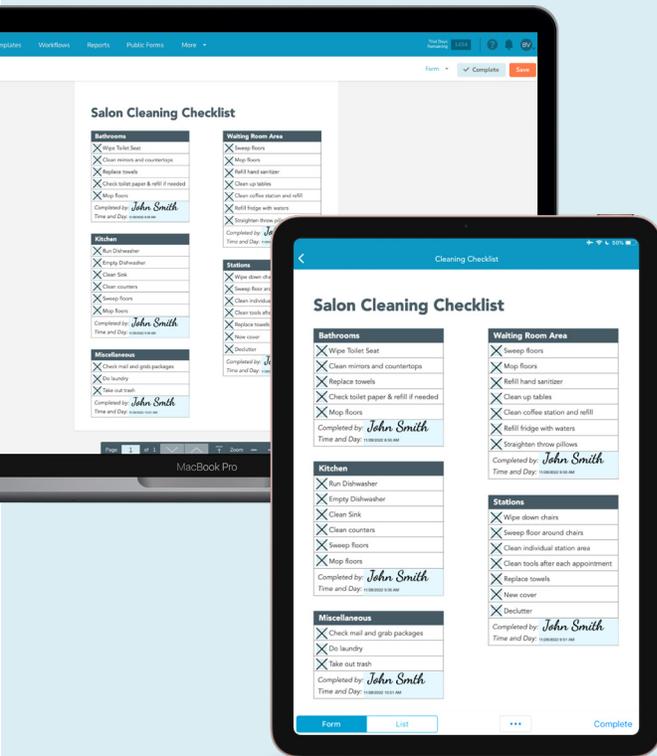
Key Features

» Dynamic Field Properties
» Automated form routing
» Reporting Tool

Key Form Fields

» Checkboxes
» Digital Signatures
» TImestamps (Date and Time)

GoFormz Overview & Free Trial

GoFormz is an operational data management solution that helps bring collected data into a single, actionable place. We believe that everyone should be able to fill out their forms online and deliver products and services that redefine how businesses of all sizes collect and process information. Whether your team needs a digitized esthetician spa menu template or requires weekly salon station cleaning report, GoFormz is the solution you're looking for.

Users can upload a JPG or PDF of their existing documents (or create a form entirely from scratch) that can be equipped with a variety of new data types like *File Attachments*, *Signatures*, *Images*, *Sketches*, *Barcodes*, and even form *Logic*. Once a form has been completed, they are automatically stored in the GoFormz Cloud and can also be instantly routed to management, customers, integrated platforms, and much more!

Getting started is incredibly easy and we even offer a free 14-day trial – with no credit card required to get started!

1. Upload a PDF or JPG of your existing form to the GoFormz Template Editor
   (or create a form from scratch using the List View builder)

2. Make your form interactive and add Logic in the GoFormz Template Editor
   Add digital fields, simple Logic, Automated Workflows, and much more

3. Fill out your digital forms from phones, tablets, and computers
   Collect data from anywhere, even while working offline

4. Store, review, share, and report on data in real-time
   Store forms in the Cloud, route data to connected systems, and more

Additional Resources

If you found this eBook helpful but are looking for additional information to kickstart your beauty and wellness business' digital transformation, reach out to our team or check out the helpful resources listed below:

Additional Popular Forms to Benefit Your Beauty and Wellness Business

- » [The Digital Sign-In Sheet](#)
- » [The Emergency Contact Form](#)
- » [The Digital Timesheet Form](#)

Helpful Blogs

- » [5 Fields to Add to Your Digital Cosmetology Forms](#)
- » [The Top 5 Digital Forms for Salons](#)
- » [The Digital Form Features Our Small Business Users Love](#)

Customer Resources

- » [Customer Success Stories](#)
- » [Customer Testimonials](#)

Helpful Information to Get Started

- » [How Mobile Forms Work](#)
- » [How to Convert Your PDFs into Fillable Forms](#)
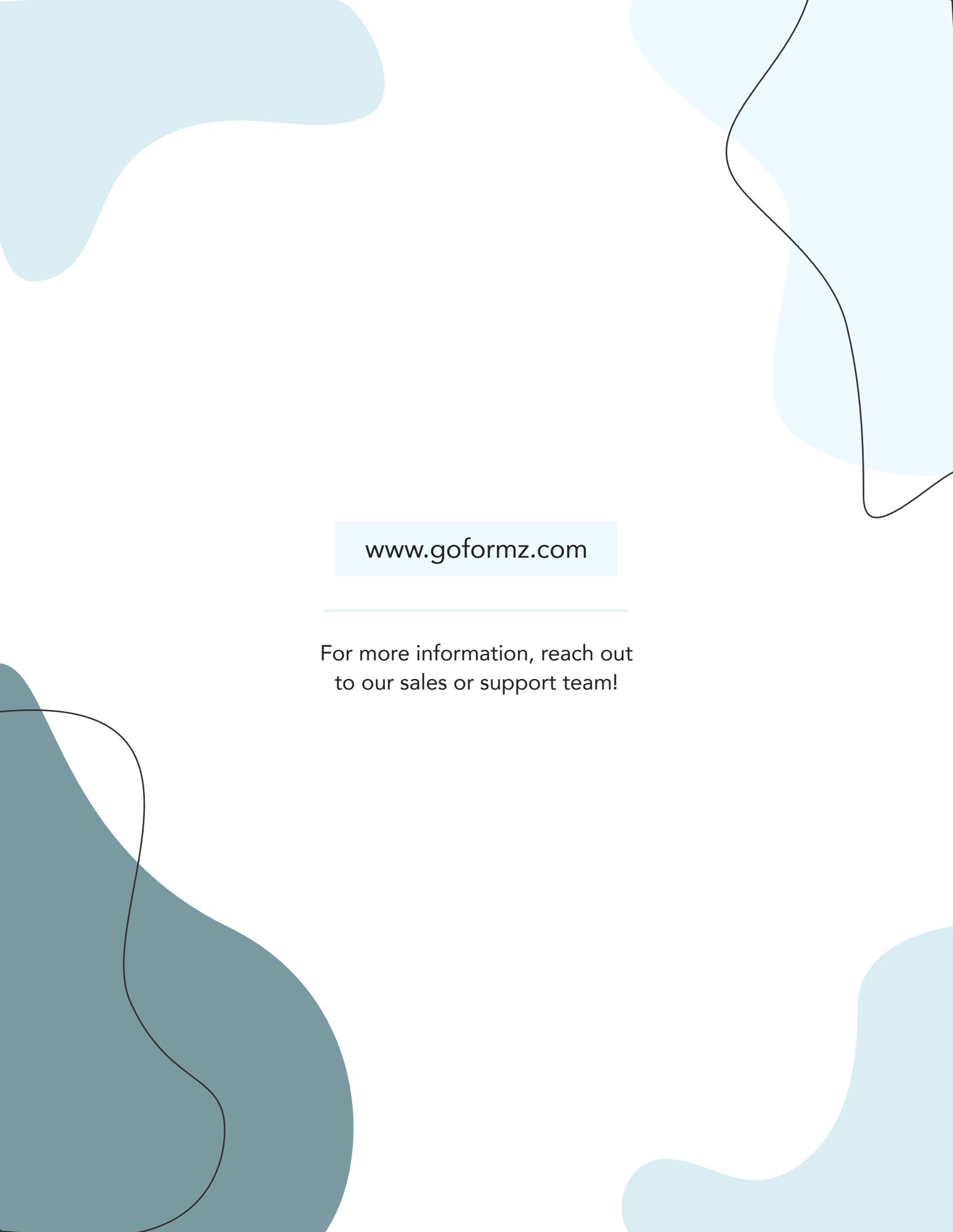
www.goformz.com

For more information, reach out
to our sales or support team!