WHITEPAPER

Exploring Adobe Experience Manager Form Solutions

In this document we review different solutions that industries are leveraging now to improve their day-to-day operations.

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ACCESSIBILITY

Accessibility is good business. Not only because it allows your organization to do business with a wider range of customers, but because it provides multiple improvements in your custom experience for all users and all consumers of your web content.

By removing or reducing the number of paper-based documents you require from your customers, and by moving more of the transactions online, you will improve the experience for all users. Moving to a more online based process for all your transactions will substantially reduce your operating costs. And a comprehensive, modern form architecture allows you to eliminate or reduce manual processing and data re-keying. By linking the accessible, web-based forms with your back-end systems you can transform how you operate and make all your customers happier.

Examples of Accessibility failures include:

- Telling users that Adobe Acrobat Reader will read PDF documents is true, but then they put an image of the form into the PDF – which Reader cannot read – resulting in the disabled user unable to use the form.
- Forcing users to download and physically fill out the form makes it very difficult for disabled users to know which fields are required and where they are located on the forms and is generally a bad   experience for any user.
- Providing fillable PDF forms is good, but many organizations force the user to download the filled version and print the form, then scan it, and send it via email. This forces all users, disabled or not, through unwanted steps and results in a much higher rate of errors and incomplete forms.
- Providing PDF forms that are fillable online and can be submitted without printing is better, but then organizations fail because they do not include effective help or field information to guide the disabled user through the form completion process.

AUTOMATED JOURNEY MANAGEMENT

In a constantly changing world of transitioning sales and marketing processes online and modernizing end-to-end sales cycles, organizations struggle to bring together customization and automation into their signature-based sales process while maintaining customer satisfaction.

Currently, many organizations are still using generic marketing messages and tactics to try and turn current and potential customers into buyers, with little to no success. By maintaining this type of process in your organization, missed opportunities and too much time spent on nurturing the sales process will become the norm.

Barriers to introducing automation to your sales and marketing teams can include lack of the appropriate software, not fully understanding how to integrate your current software and CRM tools to bring automation to the customer, and a disconnect between your sales and marketing teams. These barriers are a constant in many organizations, but by introducing the use of marketing automation, and digital forms, your signature-based sales process can turn current and potential customers into repeat buyers.

This customizable end-to-end sales process includes:

- **Marketing Automation** - automated and customizable acquisition and nurture emails to turn current and potential customers into buyers through personalized offers.

- **Digital Forms** - information is collected into the digital forms and pushed to the customer so they can choose what products or services work best for them. This information is then pulled together into a contract with only the relevant, pre-approved legal information required.

- **Digital Signature** - the contract is created through digital forms, where the customer can securely sign the document online and is legally binding.

- **Marketing Automation** - all this information is then pushed back into the marketing automation tool and can trigger further emails or nurture campaigns, extending the sales cycle.

CASE MANAGEMENT

Many organizations need to provide services that involve collections of documents, usually around an investigation or service incident. Each collection of documents is referred to as a "case." 4Point's Case Management Solution is designed to manage the capture, storage, routing, review, and archive of the documents associated with these cases.

4Point's Case Management Solution leverages the power of the Adobe Document Cloud and Adobe Experience Manager to capture inbound documents as PDF's and then distribute the documents using Adobe Experience Manager in a secure and efficient way. In addition, the solution can be integrated with other case management tools allowing the organization to continue using their current workflow and internal systems yet gain the advantages of secure PDF documents.

Examples of the industry segments where this solution is applicable include:

- Public Service Legal (courts and judiciary)
- State and Local Governments (citizen cases, investigations, application processing)

CLOUD MIGRATION

While there are some significant challenges to cloud migration, there are also significant advantages to it. Lower cost of application support, simplified infrastructure maintenance, the ability to scale up and scale down the environment to handle peak transaction volumes - all of these are long term benefits to making the switch to the cloud.

CUSTOMER ONBOARDING

Often an organization's digital transformation will stop once the new customer has signed up or purchased the product or service. This creates a significant discontinuity between the pre-engagement experience and the post-engagement experience for the customer. 4Point's Customer Onboarding solution enhances and improves the customer experience for organizations that need to gather additional data and work with the customer in more depth as part of setting up the service or providing the product.

The 4Point Customer Onboarding solution combines web based, mobile based and, in required, offline methods that make it easy and simple for the customer to provide the required information. In addition, the 4Point solution integrates data from the organization's internal systems to provide the customer with a customized and personalized onboarding process.

Examples of the industry segments where this solution is applicable include:

- Financial Services (loan agreements, insurance, account activation)
- State and Local Governments (teacher certifications, program activation)

DIGITAL SIGNATURES

For many organizations, a critical part of their interactions with their customers is a signature on a document. Whether it is a request for a change, a purchase agreement, or a loan document a signature is the default requirement for the customer to agree and commit to the document and the process.

Today most organizations force users to print forms and documents and physically sign them. But this physical process also requires the users to either physically deliver the signed documents to the organization or the users to scan and email the signed documents.

Both processes are a poor user experience and are not what your customers want or expect.

There is no need to continue to force your customers to physically sign documents. 4Point can help you link digital signatures to your forms and documents. And then you can send the pre-filled and prepared document to your customer for an online, digital signature They can sign the document in a browser or on a mobile device. This makes it easier for the user to work with you and saves you time and effort.

The combination of pre-filled, online forms and digital signatures can provide your organization with a significantly improved user experience.

Some examples of potential savings include:

- 20% lower abandonment rate on forms and documents.
- 66% higher productivity on form and document maintenance and creation.
- 1.5 hours saved per signature.
- $6 saved per signature transaction.

DOCUMENT SECURITY

Protecting company intellectual property is a critical concern for all organizations. However, many organizations need to distribute and share this valuable IP with other organizations. This exposes the company to the risk of loss and requires that the company validate that the document being shared are the correct and authenticate versions.

4Point has developed a solution and practice area around the protection, authentication and securing of important company information and documents. Using the Adobe Document Cloud, the 4Point Document Security solution provides organization with the ability to digitally protect documents so that only the intended, authorized recipients can view the document and only for the time period allowed. The 4Point solution also provides authentication that certifies to the recipient that the document is the approved version and was provided by the company.

Examples of the industry segments where this solution is applicable include:

- Manufacturing (US Federal Government suppliers, Price Lists, Safety Documentation)
- Government Agencies and Departments (Statements, Budget Reports, Audit Reports)

FORMS CONVERSION

Historically organizations depended on paper forms as the primary customer experience. And many of these organizations implemented some method of form automation in the past in an attempt to improve the customer experience. But now those forms are outdated, difficult to update and based on unsupported legacy formats or systems.

4Point provides a Form Conversion Service that can take legacy forms – in any format, from any vendor – and convert those to up-to-date Adobe Experience Manager Forms or Adobe Document Cloud PDF. The 4Point Form Conversion solution leverages 4Point's deep expertise in forms along with a collection of custom-built tools that allow 4Point to convert forms with a higher degree of accuracy and a faster turn-around time.

Examples of the industry segments where this solution is applicable include:

- Financial Services
- Governments (all levels, military)

FORMS MODERNIZATION

For many organizations, forms are a primary and critical part of their customer experience. But most forms today use an out-dated and obsolete model of data capture and data presentation. Many forms today are based on a physical paper model – they look and feel like a paper form just put on a computer screen.

Worse than just duplicating the paper version of the forms, many organizations force users to download the form, then print it, then fill it out manually, then sign it. And then the user must scan it and send the image of the form back to the company for processing. This is an extremely poor user experience. It is costly to maintain and forces the organization to re-enter all the information. And users hate it. They want an online experience that supports browsers and mobile devices. They do not understand why they must re-enter all the information that the organization already knows about them, like their name and address.

A Forms Modernization project is the way to take your paper-based and offline forms and move them online. A modern forms architecture gives you a wide range of user and organizational benefits., including:

- Lower costs of maintenance
- Faster creation and deployment of new forms
- Compliance with accessibility laws
- Browser and mobile ready
- Substantially improve user experience
- Pre-populated forms to save the user time.
- Digital signatures to speed up the form process.
- Elimination of manual data entry

HIGH VOLUME CUSTOMER COMMUNICATIONS

A major missing piece for many organizations who transform their customer experiences is the inability to improve the "after sale" interactions with their customers. Existing legacy systems and outdated ways of producing the regular information that customers need after the sale, as part of the continued relationship, result in generic, impersonal documents that do not enhance customer retention and do increase the opportunity for follow-on sales.

4Point's High Volume Customer Communication Solution provides a powerful, back-end, batch-oriented solution for the production of personalized, targeted customer facing documents such as statements, reports, invoices, and renewals. The solution can be integrated with existing legacy systems and can utilize data from multiple systems to allow for the production of highly personalized documents, regardless of the volume or complexity of the desired output.

Examples of the industry segments where this solution is applicable include:

- Governments
- Financial Services
- Healthcare

MOBILE FIELD INSPECTIONS

Many organizations need to perform in-the-field inspections, investigations and data gathering activities. Often the field locations lack effective mobile data support, requiring the mobile device to be able to capture and store the data until it can be uploaded at a later time. In addition, the data capture process is usually regulated and subject to audit which places special demands on the controls and security of any solution.

4Point provides a Mobile Field Inspection solution based on Adobe Experience Manager Forms. The solution uses Adaptive, dynamic forms and content fragments to provide a simple, clear, easy to use interface for the inspection staff, while ensuring that the form content and behaviour are established by the organization and can be reviewed, approved, and audited as required.

Examples of the industry segments where this solution is applicable include:

- Sailing Vessel Inspection (Coast Guard, Navy, Shipping Companies)
- Home Healthcare Worker (Patient Data capture and reporting)
- Vehicle Inspection (State Transportation Departments, Shipping Companies)
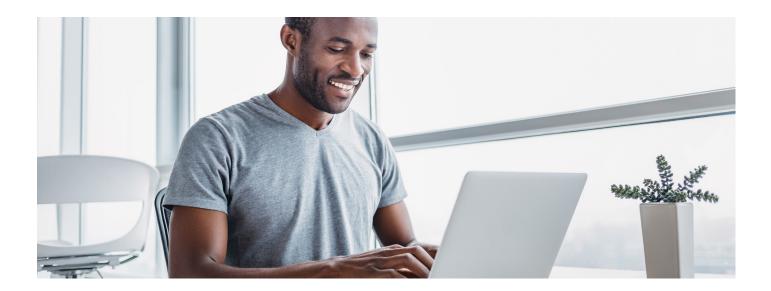- Building Inspection (Local Governments)

ABOUT 4POINT

4Point is the global leader in documents and forms. We have helped customers move from paper to digital for decades. This unmatched experience makes us experts in digital transformation. Our incomparable knowledge facilitates successful transformations from paper to digital, giving organizations limitless opportunities to save money, increase efficiencies, and enhance end-user experiences.

4Point is an Adobe Gold Solution Partner that specializes in Adobe Experience Manager Sites and Adobe Experience Manager Forms. Our team is certified and trained by Adobe. This combination of Adobe training and our unmatched experience allows us to transform organizations' processes from paper to digital around the world.

In 2003, the founding members of 4Point combined their expertise in software consulting, project management and sales to develop and support leading-edge solutions based on Adobe enterprise technology. As the company grew, 4Point added decades of experience in documents and forms. As it stands today, 4Point employs many of the original architects of the Adobe forms technology used by major global organizations. This gives them unmatched experience in the application of these technologies to your business problems.

Our expertise and focus in Adobe-based enterprise level document and form solutions helps your organization meet modern business challenges through the transformation from paper to digital. 4Point gives organizations limitless opportunities to save money, increase efficiencies, and enhance end-user experiences.

As Adobe technology has evolved, so has 4Point. We've progressed from building solutions around document output to delivering online forms and workflow applications that are beyond compare. With changing technologies, 4Point continues to build smart solutions, rooted in exceptional user experiences for your business and customers.