WHITEPAPER

4Point Exploring The Demands Of Modern Form Solutions

In this document we explore the complex demands for modern form solutions along with how technology can be leveraged to simplify the process and improve performance.

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INTRODUCTION

When people think of forms and documents, printed pieces of paper are top of mind, but forms solutions are far more than just data capture and record keeping. Forms are the starting point for critical business processes; whether the information is being submitted by a customer, an internal employee or another company who deals with your brand. Regardless of who is entering the information, something needs to happen after the information is submitted, whether it is moving the information to a database, starting a routing process, or generating a document.

Today's technology allows an organization to create powerful digital form solutions, but often technology is not being used to its fullest potential. Many organizations are still leveraging print paper, wet signatures, and manual processing of their business rules.

Although these processes are working, they are slowing everything down, increasing the rate of errors and generally hurting the health of the business. The purpose of this document is to highlight the complexity of modern form solutions and how technology can make a powerful impact on day-to-day operations for the organization.

DEMANDS OF MODERN FORM SOLUTIONS

As organizations continue to expand and grow, more is being demanded of forms solutions. Further to this, customer's expectations and demands are growing. 70% of customers will switch brands entirely after just one bad interaction.

At the top-level, forms need to be user friendly. Only content that is relevant to the user should be shown at any given time. Displaying all possible variations of a forms required elements is confusing to a user and can cause them to enter wrong information.

Expanding on this idea, users should only ever be asked once for a piece of information. Often the information will go to different business workflows and users will be presented or required to fill in the same piece of information multiple times. This should be eliminated completely and handled by the submission of the information not during the collection.

Validation of information before the information is submitted is crucial. Having a final check of the information before the form is submitted and the information is pushed into the database is critical as it is far easier and cheaper to fix data errors at the data capture level, but more importantly inline validation should be done. Immediately informing the user that something they have entered looks wrong before they move away gives a far better experience to the user.

Continuing through improving the customer experience, the form should be pre-filled with any known information about the user, system information, or any other known items, reducing the amount of information that they need to enter, as well as reducing the length of time to complete the process.

To help ensure that a user can complete the data capture process successfully, having inline help available to the user is a must. Attaching instructions directly where they are relevant and having field level suggestions improves the user experience by giving them independence to complete the process on their own.

Users are always striving to be self-sufficient; the least amount of human interaction the better and this is better for organizations as well. It is 42x more expensive to handle an in-person interaction than an online one, making online self-service portals a requirement for web-based forms.

Having forms accessible online means that more people will be trying to complete them on their mobile devices. Having forms only accessible from a computer or by a physical printed form slows down the entire submission process and lowers the customer experience. Documents need to be available in any format users want and accessible from any device they choose.

Taking this a step further, forms should be able to be started on one device and completed on another. Often users start something and then get distracted. Having the ability to save and come back to it later to complete them encourages users to act now rather than waiting for later.

Having content in multiple formats is a step in making content accessible from a physical perspective, but people with varying needs require other features such as font details, element tags and layout requirements. Having forms content accessible is a legal requirement for organizations.

Organizations still want their forms to be attractive. Marketing teams have spent long hours determining the feel for an organization and forms need to follow this as well. Consumers are spending half of their waking day engaging with content and forms are an undervalued touchpoint by marketing teams even though these are millions of touches regularly.

As organizations continue to push for more streamlined, personalized, and automated processes, forms must be able to connect to other sources in the organization. This can range from a database, another software solution or even something outside of the business directly like the current stock value of something.

The demand for real time accurate data requires complex data structures to exist within the forms themselves. This can be further complicated because of the multiple sources for the data. Original sources may not have been structured properly, different areas may refer to the same piece by a different name and often the data sources are not thoroughly documented out, requiring time to understand specifically what is being sent or what is required upon submission.

Organizations are also demanding that the time to get a new form to market is reduced. Traditional web-based form solutions are all "programmed" and require access to highly skilled web developers for even the simplest of changes.

After seeing this high-level summary of what is required of form and documents it is easy to see why forms can take a long time to create and update. Luckily, technology has advanced and leveraging appropriate tools in the correct areas can drastically reduce the amount of time to create and maintain forms.

LEVERAGING TECHNOLOGIES PROPERLY

Technology has come a long way and can either improve or impede the organizational flow within a business. The key is to understand what specifically you need to do and how technology can help.

There is a wide range of technological solutions for every issue, but it is about understanding how they are different, what their benefits are, how they meet your business requirements; more importantly what they can't do. No single off the shelf product will ever be able to handle the unique processes of a business which opens the debate of building something in house rather than settling for and off the shelf products.

Custom building a solution is the only way to get everything exactly the way your organization would like them. The trade-off is that it is expensive to build and maintain. You must ensure that you keep the skills in house to be able to make changes and rely heavily on IT to ensure everything is working correctly. Another consideration when building in house is ensuring that you can communicate the actual business requirements to the project team. Moving business requirements into technical requirements can be tricky, so the final in house solution may still not meet an organization's needs completely.

The benefits of leveraging off the shelf products allows organizations to get started faster. The solution would likely still need to be configured but the time to production is radically reduced. Further to this, software is continually being improved by the software provider, adding new features, fixing bugs, and generally keeping the software healthy.

The key to remember when evaluating off the shelf products is that you don't have to have one solution to house everything. For example, you can leverage a marketing automation solution to send out a personalized offer containing a web-based form generated from a form rendering engine, which pulls relevant information from multiple sources allowing the form to be personalized with the specific customer information, offer current product details, etc. Ensuring the form rendering engine is also connected to your approved digital asset management system confirms the rendered form is leveraging the current approved assets. Including a digital signature directly within the rendered web form allows the entire offer to be completed in one session.

Finish the process by submitting the captured form details to a workflow engine to continue the business process once the application has been completed. Integrate the rendered form with an analytics tool is a bonus to gain critical information on how your form application is performing for future enhancements integrated with an A/B testing tool to understand how variances can impact your processes.

The above example divides the separate pieces of a marketing workflow to help demonstrate how different software solutions can be used to handle different steps in the process. This is not to say that you can't leverage something like Adobe Experience Manager to handle more than one of the pieces, or build one complex solution, but rather understanding that different steps allow organizations to see what pieces they have already, what they are missing and more interestingly how they can leverage the pieces together to build out powerful digital form solutions.

IDENTIFYING POTENTIAL FORMS IMPROVEMENTS

Forms and documents solutions tend to get overlooked because they are generally working, but just like it is beneficial to upgrade your windows or replace your water heater, it is important to evaluate your organization's forms processes to see if they can be improved. Even just improving one part of your organizational process can have a big impact on savings for the organization.

Here are some customer success metrics to consider when evaluating your form solutions:

- Organizations that focused on digitizing their information capture forms have seen a 56% lower abandonment rate.
- Modernizing form creation tools can reduce the time to create a new form by 53%.
- Automating manual processes within an organization has shown 50% lower processing times.
- Moving to a prefill, sign, and submit form has saved up to $97 per document.
- Upgrading information capture can reduce the time to complete a form by 58%.
- Implementing online forms portals can increase self-service by 64%.
- Modular form design can reduce the time to update forms by 79%
- Digitizing form solutions have led to onboarding customers 61% faster.
- Automation of form processes has 25% improvement in compliance.
- Updated form solutions have reduced complaints by 40%.
- Digital signature solutions can get a signature 28x faster than traditional wet signatures.
- Digitizing solutions can save 50% in paper costs.
- Online Self Service have reduced 15,000 branch visits.
- Digital billing can create and send bills 50% faster.

Forms solutions can be very complex with many moving parts. The best way to move forward is to identify where changes would make the most impact.

Here is a quick list to identify areas in your forms solutions that should be modernized:

- Are you using paper?
- Are you capturing information?
- Are you generating documents, letters, invoices, packing slips or shipping labels?
- Are you creating portfolios containing multiple different documents?
- Are there manual steps that require a human to complete?
- Do you require a wet signature?
- Do you have to print during any business processes?
- Do you have to email, fax, or mail a document?
- Are your online forms meeting the WCAG Accessibility standard?
- How are you managing confidential documents?
- Do you do in field inspections?
- Do you create high volume customer communications?
- Do you have both online and offline information capture requirements?
- Do you need to create personalized output?
- Do you currently have statistics on how long users take to fill out your forms today (how long a user stays on a specific field or abandonment rates)?
- How are your forms currently being created?
- How are you disseminating your form templates to be filled out?
- Are there any commonalities across different forms in your organization (like a common address block)?
- How do you manage your form templates today?
- Do you have any archive requirements?

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.