

WHITEPAPER

How to get started with Forms

This document helps to guide an organization in how to move forward with an Adobe Experience Forms solution for their organization.

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INTRODUCTION

Form solutions are more complicated than they first appear. Typically, when people think about forms or documents they think of an 8 by 11 piece of paper. This is just a small portion of a forms process. To get the complete vision of a form solution you need to explore four main areas; data capture, data processing, data routing and lastly record keeping.

DEMONSTRATE VALUE

To be able to have management support for implementing a forms solution you must be able to demonstrate a quantifiable benefit to the organization. This can range from hard metrics like hours saved or direct cost savings or less tangible benefits like customer satisfaction and accessibility.

To build the case for your form solution, 4Point recommends starting with a data capture/presentation by selecting a high value form within the organization now. This could be something that is used regularly or something that may not be used as frequently but is critical to the business process that would be used as a prototype for the organization to see, to use, to help demonstrate the benefits of moving forward with a complete forms solutions.



EXAMPLE PROTOTYPE

4Point recommends creating an adaptive form version of your high value form. Adaptive Forms allow for a single form template to exist and automatically adjust to the screen resolution making the form mobile ready out of the box.

This form would be stand alone, so not connected to any data or and workflow process. This allows the organization to see how the data capture portion of the business process could be improved without having to do the structural framework required to see the full benefit of an Adobe Experience Manager Forms solution.

From this you are also able to now more clearly see how data can be pushed into the form onload to personalize the experience based on the data being sent. This helps communicate how the number of forms can be reduced based on leveraging existing data.

Adobe Experience Manager, although fully capable of handling the end-to-end forms process, tends to be more impactful for organizations when integrated with other existing software solutions. Understanding the Adobe Experience Manager Forms can fill in the gaps.

Having a real form that people can see and interact with allows business to visually see the benefits that can be gained from modern form designs.



DEFINE A STRATEGY

To be able to move forward with a complete forms solution you need to understand specifically what that means for your organization. Does that mean moving all your forms to the Adaptive Form format or leaving them in another format. What existing systems should be integrated with Adobe Experience Manager Forms and what are the responsibilities of each of these systems?

Once a strong understanding of the business objectives has been defined you can build out a strategic roadmap to mitigate technical debt while ensuring the prioritized items are being addressed in a timely fashion.

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.

