Moving the needle for digital forms maturity.

Table of contents

Evolving forms to meet citizen expectations

Digital forms are an increasingly critical part of the citizen experience. Citizens want the ability to access forms through self-serve applications, fill, sign, and return them on any device, and receive instantaneous responses. Incrementally maturing your digital form capabilities can help you meet their expectations—and gain significant increases in efficiency that will drive costs and resource down and citizen satisfaction up.

Digital forms maturity model

STAGE 1

Paper based
Simple online PDF forms and manual processes.

STAGE 2

Digital
Fully digital forms with e-signature capabilities.

STAGE 3

Responsive
Adaptive forms that work across devices and integrate with agency processes.

STAGE 4

Optimized
Personalized forms and workflows across channels.

STAGE 5

Intelligent
Form creation at scale via AI and machine learning.

MATURITY STAGE 1

Paper based

Benefits at this stage:

Citizen

- Forms are a mix of both traditional paper and static PDFs.

- PDFs are online, but must be downloaded, printed, filled, and signed. Processing involves scanning and emailing or mailed for processing.

Government Organisation

- Processes are in place to complete transactions with customers.

CASE STUDY 1:

Digitising applications

As COVID-19 closed the doors of businesses nationwide, this public client urgently needed to be able to help local small businesses apply for grants and tax deferrals. With their offices closed to the public, they accelerated plans to launch Adobe Sign, stood up a new implementation to support their grant program, and partnered with another Government organisation to set up the web form that enabled small businesses to apply for the tax deferral program.

Solution

- Use Adobe Sign to send award contract agreements and forms in bulk.

- Receive applications through an Adobe Sign web form.

- Enable batch processing to quickly collect signatures from business owners.

RESULTS:

Set up a new, self-serve small business relief application **in less than 2 days.**

Completed **more than 20,000 transactions** in four weeks.

Delivered > £30 million in financial relief to small businesses in just 3 weeks. Helping them through the pandemic and supporting the local economy.
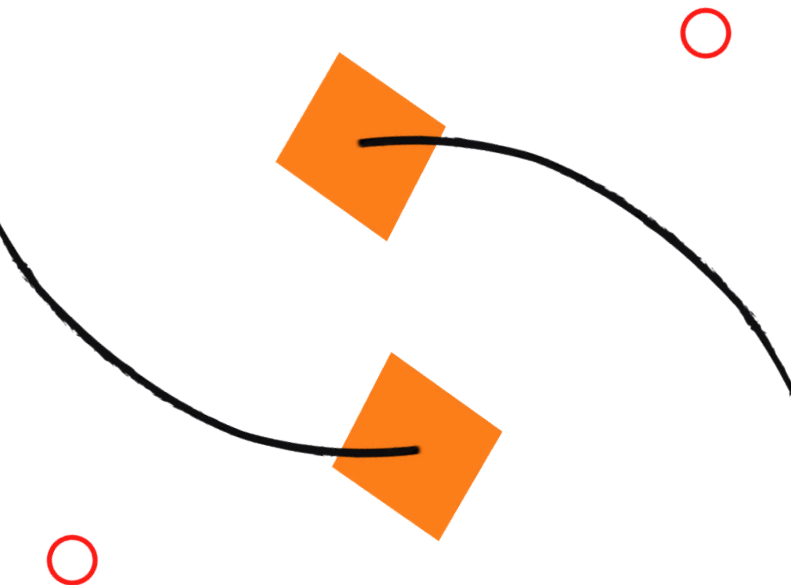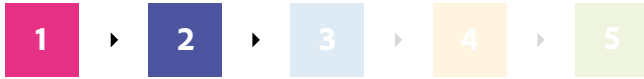
MATURITY STAGE 2

Digital

Benefits at this stage:

Citizen

- Forms are typically easy to find on your website.
- Forms are easy to fill out, sign, and submit online.

Government Organisation

- Accelerated form approval and response processes.
- Reduced costs associated with overheads and resources.
- Seamless Government organisation continuity with remote workers and staff.

"

Working with Adobe has allowed us to be agile in our response to the pandemic and the rapidly changing situation ahead of us.

S.V. is a Chief Operating Officer

TIP:

Move your maturity to stage two to get results similar to this client, and capabilities that enable the following:

- Automatic submission of data into your systems.
- Reduced rate of incomplete or inaccurate data.
- Automated review, approval, and signature workflows.

CASE STUDY 2:

Ramping up digital forms

When COVID-19 inhibited face-to-face visits, this client took a digital approach. Redesigning the application process as an end-to-end digital experience meant that customers would not have to risk leaving their homes.

Solution:

- Transform the application process into a fully digital experience in one week.
- Add e-signature capabilities to allow customers to sign from anywhere.

RESULTS:

Digitised 18 and processed **80,000 forms** in **eight weeks.**

Turned 15,000 potential face-to-face visits into digital-only interactions, ensuring services were delivered efficiently and safely for citizens.

MATURITY STAGE 3

Responsive

Benefits at this stage:

Citizen

- Forms are prefilled with citizens' personal information.
- Personalised responses are delivered to citizens preferred channels.
- Citizens can save and resume form filling across devices, if they need to pause or lose connectivity.

Government Organisation

- Form authors can create form fragments to use again and again, and make multiple form updates at once, saving hours in resource.
- Forms workflows are automated and communications are triggered by submission, improving operational efficiency.
- Easy back-end integration with legacy systems, CRM, and databases enables personalised responses and process automation.

> " In addition to cutting steps from our processes, we can now output copies of completed forms to PDF to add a layer of hands-on service.
>
> **L. V.** is a Program Director

TIP:

Move your maturity to stage three to get results similar to this client, and capabilities that enable the following:

- Guided step-by-step mobile-responsive form filling experiences.
- Automated digital process workflows and document tracking
- Integration with enterprise apps (Microsoft, Salesforce, Workday and more).
- Create, manage, and update forms and documents without IT.

CASE STUDY 3:

Improving digital enrolment

When this client began to see a high drop rate during mobile enrolment processes, they leaned on analytics to identify friction as well as opportunities to improve
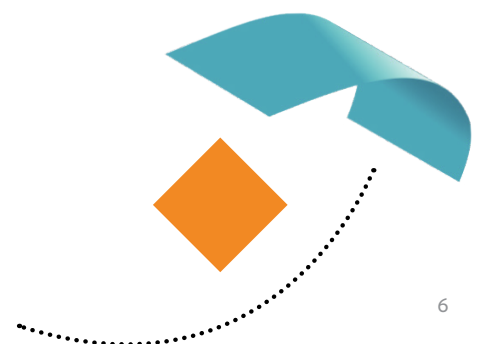
Solution:

- Connected form to customer data to enable prefilling of form fields.
- Provided end users with document of record for reference and archival.
- Maintain centralised form library and shared content assets for faster updates.

RESULTS:

Reduced the number of forms processing steps from **7 to 4.**

Increased online enrolment conversion from **33% to 80%.**

MATURITY STAGE 4

Optimised

Benefits at this stage:

Citizen

- Web experiences include personally relevant help and communications.

- Citizens can serve themselves via personalised portals.

Government Organisation

- Improved citizen Satisfaction.
- Improved internal effectiveness.
- Data insights that empower creators to optimise web experiences and forms.

TIP:

Move your maturity to stage four to get results similar to this client, and capabilities that enable the following:

- Continuous citizen experience improvement via data insights.
- Granular analytics to identify and remove citizen friction.
- Customised content proactively sent or presented during web visit.

CASE STUDY 4:

Optimising client experiences

With more than 1,000 versions of relevant content, sending hundreds of thousands of letters with the right information was complex for this client, and difficult to achieve at scale. Additionally, because this client relied on designers to edit every version and every update of the material, slow turnaround times were common. Improving efficiencies in their processes could help them quickly contact the right individual with the right information.

Solution:

- Use Adobe Experience Manager Forms and Assets to centrally manage external communications.
- Enable non-technical users to easily edit communications while complying with brand standards.
- Remove delays between operational staff and artwork designers.

RESULTS:

Cut delays in sending relevant content **from 4-5 days down to 15 minutes.**

Scaled external communication, optimised for any device in various channels.

Improved client experiences with **streamlined communication and proposals.**
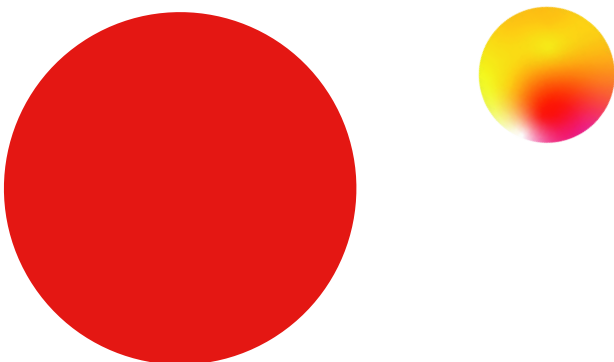
MATURITY STAGE 5

Intelligent

Benefits at this stage:

Citizen

- Experiences are digital, mobile responsive, modern, optimised, and personalised for the end-to-end journey.

Government Organisation

- Minimal time is spent on form and document creation, optimisation, and management.

TIP:

Move your maturity to stage five to get results similar to this client, and capabilities that enable the following:

- Automated transformation of paper and legacy forms to digital and conversion at scale.
- Automatic identification and extraction of existing reusable form fragments.
- Integration into back-end systems via automated schema creation with form conversion.

CASE STUDY 5:

Making forms intelligent

The client wanted to improve experiences for external users, but to do so in a way that wouldn't require them to re-deploy existing resources

Solution:

- Use AI/ML based service to convert legacy forms to mobile-responsive forms at scale.
- Optimize digital inventory for faster updates across multiple forms and documents.
- Automate the creation of contextually relevant experiences.

RESULTS:

Increased user **satisfaction.**

Less time spent building forms and documents plus **freed-up time to build** modern digital experiences.

True end-to-end multi-channel personalised enrolment and onboarding.

Comparing capabilities side by side

While the main goal of maturing your digital forms is to improve citizen experience, it also brings technological capabilities that greatly improve efficiency. Use the chart below to discover the capabilities your next stage will offer.

Citizen experience	Stage 1	Stage 2	Stage 3	Stage 4	Stage 5	Organisational efficiency
Simple PDF forms are easy to find online.	X	X	X	X	X	
Convert Word, Excel, and other files to PDF.	X	X	X	X	X	
Advanced mobile fill capabilities (list selection, date selection, and more).		X	X	X	X	Legal and compliant electronic and digital signatures that provide the highest level of assurance of a signer's identity.
Forms and documents render perfectly according to screen size for optimal reading and filling.		X	X	X	X	Scan document and convert to fillable PDF.
Form look and feel are consistent across devices.		X	X	X	X	Convert PDF into mobile responsive form.
Secure and compliant e-signature capabilities.		X	X	X	X	Capture legally binding e-signatures.
Fill forms via mobile app, even when offline.		X	X	X	X	Capture data in the field efficiently, even when offline.
Self-serve online forms.		X	X	X	X	Automated data submission into legacy system.
Forms fields are auto-filled, saving time and effort.		X	X	X	X	Form fill validation to reduce errors and increase data quality.
Digital submission, review, approval, and signature tracking.		X	X	X	X	Visual workflow editor to see or adjust form processes / routing in real time.
Accessibility features (read, fill, speech to text, sign, and more).		X	X	X	X	Create one form with dynamic screen display.
Integrated form and site experience.		X	X	X	X	Forms and documents embedded into adjacent web experiences.

Citizen experience	Stage 1	Stage 2	Stage 3	Stage 4	Stage 5	Government agency efficiency
Save and resume across devices.			X	X	X	Automated digital process workflows and document tracking.
Guided step-by-step form-filling experiences.			X	X	X	Integration with enterprise apps (Microsoft, Salesforce, Workday, and more).
Personalised responses sent via preferred channels.			X	X	X	Centralised, automated forms and document management.
			X	X	X	Connect form data to multiple systems for automated through processing
			X	X	X	Submission-triggered, automated external communication.
			X	X	X	Create, manage, and update forms and documents without coding.
			X	X	X	Apply changes to one form or document across an entire library.
			X	X	X	Author forms, form fragments and documents via drag and drop components.
			X	X	X	Create reusable templates and text boxes.
Continuous experience improvement via data insights.				X	X	Granular analytics to identify and remove citizen friction.
Personalised **citizen** portal.				X	X	Form testing and optimisation.
Custom, personalised web experiences and supporting workflows.				X	X	Opportunity to create awareness of related information relevant to that individual
Personally relevant offers and communications across web experiences.				X	X	
Contextually relevant delivery of forms and documents.				X	X	
					X	Automated transformation of paper and legacy forms to mobile-responsive forms.
					X	Machine learning (ML) optimisation recommendations and actions.
					X	AI identification and extraction of existing reusable form fragments and elements.

Solutions across the citizen journey

According to Forrester, improving the customer experience by one point can drive huge results with citizen satisfaction. Since forms are one of the first interactions public sector organisations have with citizens, there is no better place to start. For this and every step of the citizen journey, we have a solution that can help.

Citizen Journey

	Awareness ▶	Enrol and onboard				▶ Support
Action	**Find**	**Fill**	**Sign**	**Process**	**Respond**	**Optimize**
Adobe's digital enrolment solution	Build an online forms portal for easy digital access.	Scan to digitise paper-based documents. Convert to mobile adaptive forms at scale with AI and machine learning.	Capture digital & e-signatures that are legally binding and globally secure.	Automate operational and approval workflows. Ensure compliance with audit trials and document of record and archiving.	Deliver personalised citizen communications.	Track abandonment rates and drop-off points to optimise experiences and maximise satisfaction.
Adobe Experience Cloud ecosystem	• Adobe Acrobat • Adobe Sign • Adobe Target • Adobe Campaign • Adobe Experience Manager	• Adobe Acrobat • Adobe Sign • Adobe Experience Manager	• Adobe Acrobat • Adobe Sign • Adobe Experience Manager	• Adobe Acrobat • Adobe Sign • Adobe Experience Manager	• Adobe Acrobat • Adobe Sign • Adobe Target • Adobe Campaign • Adobe Experience Manager	• Adobe Acrobat • Adobe Sign • Adobe Analytics • Adobe Experience Manager

Security and compliance

Our solutions also give you the features you need to keep citizen information secure, and to remain compliant with regulations as they change. Control who can edit, approve, and publish content, and comply with security and privacy standards with our proven solutions.

Adobe Acrobat and Adobe Sign

Document-level control	Cloud security and process control
• Prevent editing • Control access • Redact sensitive information • ISO 27001 /Soc2 Type 2 / PCI / FERPA / GLBA	• PDF data secured in motion and at rest • 21 CFR Part 11, SAFE BioPharma, HIPAA

Adobe Experience Manager Forms	Adobe Experience Manager deployed on managed services
• ISO 27001 /Soc2 Type 2 / PCI / FERPA / GLBA	• ISO 27001 / Soc2 Type 2 / PCI /FERPA / GLBA / IRAP

Adobe Sign is Microsoft's preferred e-signature solution.

Adobe Sign can be used in a way that enables public sector organisations to help meet their legal obligations related to the use of service providers. Ultimately, the customer is responsible for ensuring compliance with legal obligations, that the Adobe service meets its compliance needs, and that the customer secures the service appropriately.

Connect with us to take your forms maturity to the next stage.

Contact us

Adobe