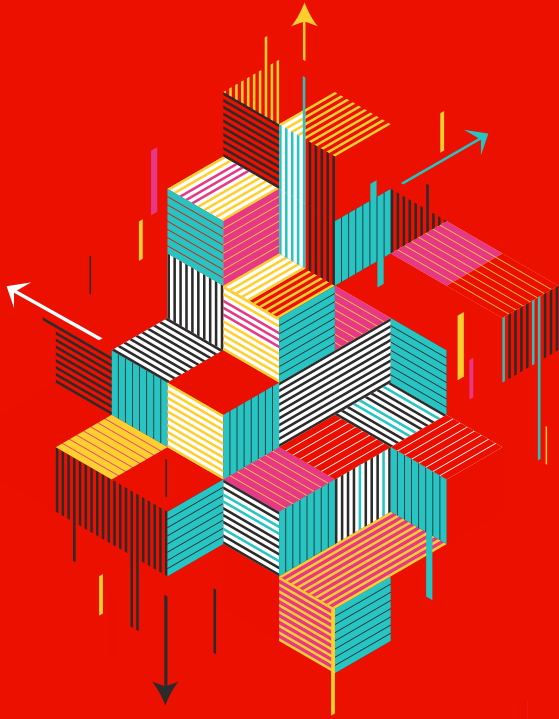




# How to select the right enrollment and forms management solution for your agency.



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# Raising the bar.

Creating a consistent and seamless digital services enrollment experience for people who depend on your agency is an operational priority. Private sector advancements in online experiences and commerce have raised the bar for how people define a positive digital experience.



# The public's need for proactive and responsive government is growing.

The demand to address issues that range from homelessness, healthcare, and job displacement to accessing education opportunities and creating new businesses has government agencies

all across the country looking for ways to increase enrollment completion and streamline processes. To better put people first and provide the right tools for their workforce, agencies need a forms management solution that creates a unified customer experience on all devices, improves citizen enrollment, and speeds up service delivery.

When you select a forms and enrollment solution, you want one that will provide the quickest time-to-value—but also show long-term value. The ideal solution will improve citizen communications, and also address IT concerns around security, scalability, and administration. With those criteria

in mind, you'll want to avoid shortcuts and freebie forms solutions that will only cost you more down the road. You don't want to have to build those forms, workflows, and emails again in a couple of years. Helping citizens with applications and enrollments are at the heart of your mission. Find a solution that will allow you to proceed



Only  
**38%**

According to Forrester's 2020 U.S. Federal Customer Index, only 38% of people found their interactions with their government to be positive. State and local governments had similar results.

with confidence, knowing that you're building your enrollment processes on a solid foundation that will serve you for years to come. In this guide, you'll learn how to make objective assessments of the forms solutions you evaluate.

## **Use forms to transform the customer experience.**

Today, COVID-19 has accelerated the need to digitally transform and has set new expectations for customer experience. The imperative for businesses and governments to digitize their essential operations for consumers, citizens, and employees has never been greater. But many organizations are struggling with paper-based, legacy data capture and e-signature workflows that result in poor customer engagement, enrollment, and onboarding experiences. They want to quickly digitize and automate subpar experiences, but legacy and inflexible technology cripple their ability to move at the desired pace.





Here are five things to consider when selecting a forms solution:

# 1. Speed up and scale up your conversion to interactive forms.

The need for paperless government is only intensifying. Agencies recognize that digital and online forms not only improve the speed of service delivery and customer satisfaction, but they also lower workforce frustration and save money. As an added bonus, you become a greener workplace by reducing paper.

Modern forms solutions should be able to easily convert your paper-based or PDF forms into digitized formats that can be signed and submitted without downloading. Built-in artificial intelligence (AI) and machine learning features can help you save a massive amount of time and effort by automatically identifying and converting form elements. Fields, images, and text are moved into the right locations, using the right formats.

A content-first forms management solution lets you easily manage, reuse, and connect hundreds or thousands of forms. When your agency announces a new program or service, program managers can repurpose existing content to quickly create and publish a new form. When a reusable text block or image is changed in one place, it's automatically changed everywhere.

In basic form builders, someone has to go through every form and template to be sure changes are reflected throughout.

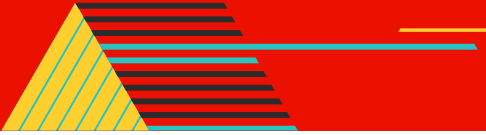
Being content-first also applies to integration points. Applicants appreciate when known information is pre-populated, especially when there are multiple related forms. Not only is this practice more user-friendly, but it also reduces paperwork errors. When those fields are connected to an internal contact management system, a content-driven forms solution allows you to update those field records and labels centrally, while maintaining the link to the source system.

### **Hidden challenge:**

While most solutions offer content reusability, they don't always give you the ability to scale content changes across hundreds of templates simultaneously.

### **Questions to ask:**

- Does the forms solution offer a centralized library with reusable components, multi-device preview, connectors to common translation services, and other capabilities that enable you to scale easily across multiple departments, devices, browsers, or languages?
- Can the solution automate conversion of your legacy forms to mobile-responsive digital forms? You can't hope to meet the high expectations of the digitally-savvy public if you haven't yet moved your forms to digital.



## 2. Personalize your enrollment experiences.

When it is mission critical to improve awareness, engagement, and service delivery, every touchpoint counts. That's why it's so important to select a forms and enrollment solution that makes it easy for employees to provide consistent experiences. Whether people are obtaining a license, starting a new business, filing taxes, or applying for a benefits program, they want assurance that they can submit their information from any device, that their data will be captured accurately and securely, and that there will be confirmation and communication related to their inquiry or enrollment. A simple form builder isn't going to be robust or secure enough to meet the objectives and high standards of most government agencies.

The right form builder will allow you to reach diverse audiences. Forms and follow-up communications can be sent in multiple languages and meet accessibility standards. By swapping out graphics and content blocks, you'll be better able to reach and represent different populations, needs, or geographies. At a minimum, a forms management solution should allow you to create custom themes and branding that can be applied to any template and easily updated. But trying to manage, update, and personalize hundreds of forms is too time-intensive to do manually. That's why, when it comes to personalized enrollment experiences, it's critical to have a forms management solution that allows you to make changes at scale.





### **Hidden challenge:**

Some vendors tout the ability to quickly build and upload forms to your website, but they often limit your ability to create custom, personalized enrollment experiences that scale.

### **Question to ask:**

- Is the solution limited to static forms, or does it allow you to dynamically personalize and optimize enrollment experiences based on what you know about each individual?



### 3. Look for open extensibility.

A stand-alone or paper-based form has to be scanned, filed, and stored for permanent record keeping. Often the information also has to be manually entered into an enterprise system. Rather than expending so much time on low-value administrative work, enrollment processes can be connected to enterprise databases and systems. Data should securely flow out to forms to pre-populate known field records, and updates made by applicants should be automatically reflected back into the enterprise system.

Unfortunately, for most agency solutions, that's not the case. Enterprise integrations have historically required hiring expensive consultants or taking on even more expensive custom development projects. Tight government budgets often put these integrated solutions out of reach.

Cloud-based solutions are changing the way agencies operate and you want to be able to evolve and collaborate with ease. Even if your agency primarily uses one specific business solution today, it's shortsighted to get a forms solution that only works with that system. Open extensibility gives you the flexibility to add new business systems with minimal impact to enrollment processes.

Look for a forms management solution that comes with out-of-the-box connectors to multiple business systems. Or even better, find one with an open design that makes it easy to connect to any back-end system with minimal effort. Solutions built on an open-source technology with multiple integration protocols have a big advantage in this area.

# Personalization throughout the citizen journey.



## ENGAGE

Communications, public relations, and marketing.



## ENROLL

Eligibility and enrollment forms and applications.



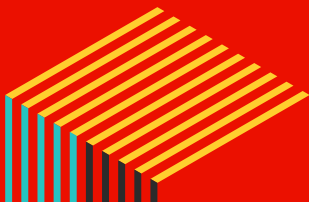
## ONBOARD

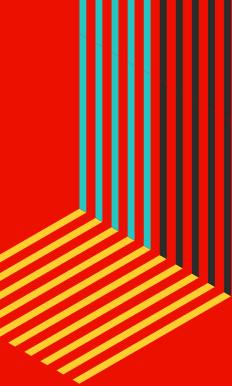
Status letters, welcome kits, emails, and contract documents.



## RETAIN

Account notices, statements, and sales offers.





### **Hidden challenge:**

Certain forms management solutions come with a few out-of-the-box connectors but require unforeseen consulting fees to connect the systems you actually use.

### **Question to ask:**

- How much time, effort, and cost will be required for each integration that isn't provided with the solution?

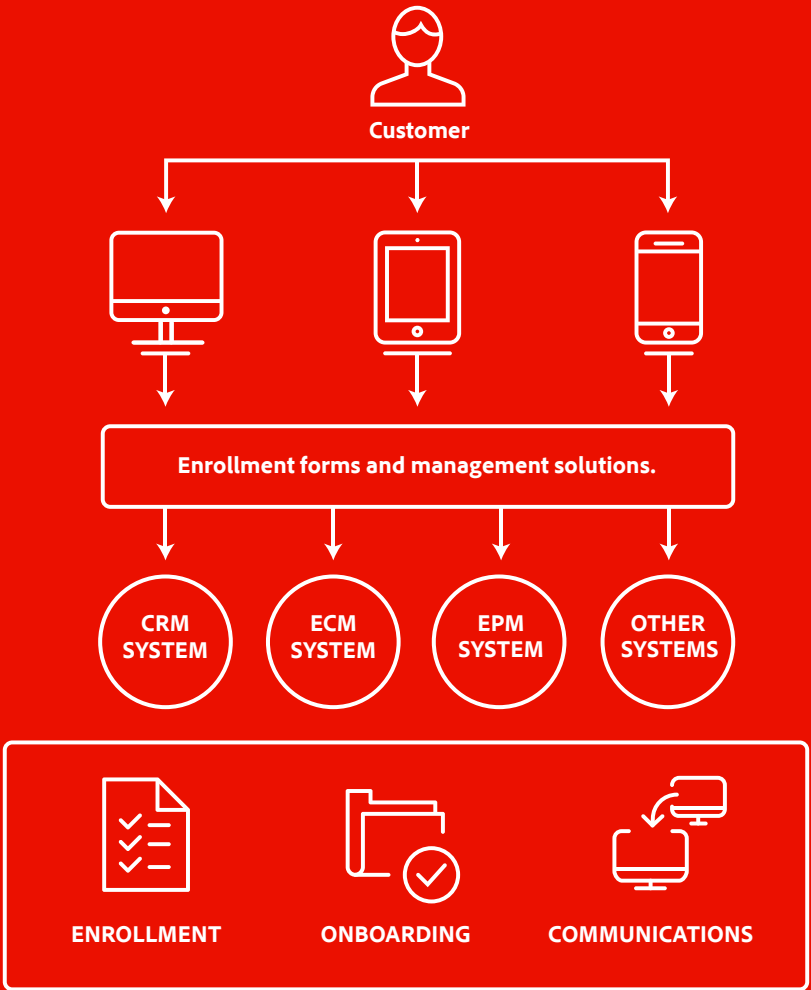
## 4. Avoid common DIY pitfalls.

Sometimes organizations with robust IT or development teams consider developing their own enrollment processes. They might think that by leveraging internal development teams, they'll be able to build capabilities for less money. Or on the flip side, they allow smaller departments to make their own forms decisions. Both approaches have major pitfalls.

Building and managing a few basic forms or enrollment experiences might be a fine and necessary temporary solution, but trying to scale do-it-yourself (DIY) enrollment processes and the associated forms into double or triple digits quickly becomes unmanageable. Even with increasing investments in developer and support personnel, without sophisticated content management, AI automation, and integration capabilities, it's impossible to keep up with the modernization, content updates, branding, and personalization demands needed to meet the public's evolving expectations.



# Forms and enrollment processes must be connected to enterprise systems.



# DIY can't scale or keep up.

One of the main reasons is that it's entirely reliant on manual development efforts to make changes. Without a centralized content management interface to quickly update the common content blocks across hundreds of different forms, you may have to manually code each of those content updates. Any integrations between fields on a form and a CRM or other business system would also have to be manually coded on each form. And if those fields ever change, each change would need to be manually coded again. Keep in mind that any change to content results in code change requests that will always be dependent on IT resource availability and release cycles.



DIY solutions rarely go beyond basic enrollment capabilities, making it difficult or impossible to optimize and personalize enrollment experiences, let alone measure their success or failure. When someone starts an enrollment process, you need to see it through to the end, sending reminders and following up as needed.

When rogue forms are created and distributed without any administrative knowledge or oversight, the agency can face significant compliance, privacy, and security concerns. The submitted information is sitting somewhere and is likely to contain personally identifiable information and even sensitive information. Government agencies who fail to maintain the highest standards of data privacy can leave themselves exposed to fines, lawsuits, and loss of public trust.

These same visibility and governance issues make it hard to ensure consistent branding and enrollment experiences. In the long term, the ongoing expenses for a DIY solution significantly outweigh the cost of investing in a full-featured enrollment solution that ultimately saves money and drives revenue.

### **Hidden challenge:**

Most forms management solutions focus either on facilitating business workflows or creating front-end interactions, but not both. The difficulty of finding expertise on both ends limits the vendor playing field considerably—and explains why most DIY forms management attempts fail.

### **Questions to ask:**

- What are the long-term costs of internally building and maintaining forms management and enrollment processes?
- How will it impact resources needed for other mission-critical initiatives?
- Do we have the content, asset management, and authoring governance required?





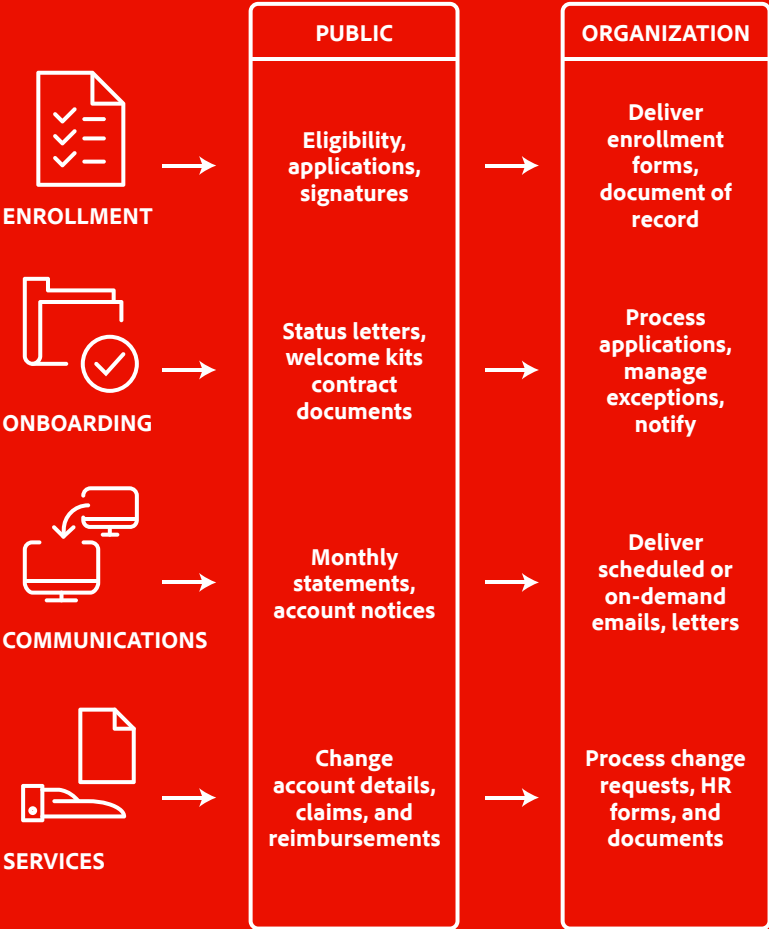
## 5. Consider the end-to-end citizen journey.

First impressions have a powerful impact on conveying trust. The first few interactions and communications set the expectations for the agency, and the enrollment process can be a key touchpoint in earning public trust. In fact, post-enrollment interactions that create consistent, personalized experiences are critical to delivering on the agency's mission.

Many enrollment and forms management vendors are beginning to recognize the need to sustain trust-building experiences, and some have subsequently invested in solutions that help with public interactions, such as welcome kits, onboarding, letters and correspondence, document assembly, and personalized offer management. Forms management vendors new to these areas either invest in existing third-party technology or try to develop it themselves. In either case, disconnects between new solutions and their own enrollment solutions generally result in suboptimal experiences. That's why it's best to find a vendor that already has maturity in all these areas and can help you provide consistent experiences that improve service delivery.

When evaluating enrollment and forms management solutions, it's also wise to be future-minded and consider the big picture, both for applicants and agency employees. There's tremendous value in a solution that can tightly integrate every aspect of enrollment to service delivery experience, including providing usable analytics that allow you to continually improve.

# Enrollment and forms management should be an integral part of the public's digital experience.





## **Hidden challenge:**

Some forms solutions don't have strong integrations or can't be styled to look cohesive with your website. Solutions with their own enrollment forms may create a disjointed experience.

## **Questions to ask:**

- How well does the solution tie into other solutions we need for managing the citizen journey?
- Will we be able to create consistent experiences throughout each stage?

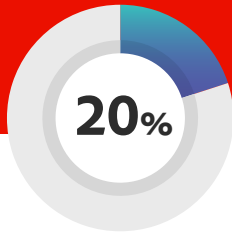
# Recognized enrollment and forms management solution leader.

Adobe provides market leading applications that transform paper-based interactions into simple, effective enrollment and onboarding experiences that work on any device.

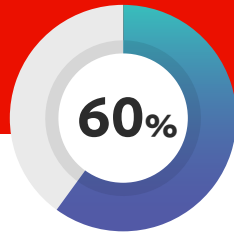
**Adobe has a proven track record for results.**

# 379%

Average 3-year ROI



**Lower form abandonment rate**



**Higher productivity**



# As a leader in 2021...

at the Gartner Magic Quadrant for Digital Experience Platforms, and a Leader in Customer Communications Management on the Aspire Leaderboard, Adobe Experience Manager—and Adobe Experience Manager Forms in particular—is uniquely positioned to address all the critical elements covered in this buyer's guide.

Experience Manager Forms gives you a robust, enterprise-ready solution that enables you to quickly create and deliver digital forms and documents that are responsive and customized for any channel and device. Scalable drag-and-drop authoring tools let you update, brand, and personalize all of your forms and documents with ease and speed. Plus, native integration with other Adobe Experience Cloud solutions lets you deliver seamless, end-to-end experiences.

To learn more about what Adobe Experience Manager Forms can do for your business, visit:

<https://business.adobe.com/products/experience-manager/forms/aem-forms.html>

Or see how we've helped San Francisco make taxes less taxing:

<https://business.adobe.com/customer-success-stories/san-francisco-tax-office-case-study.html>

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