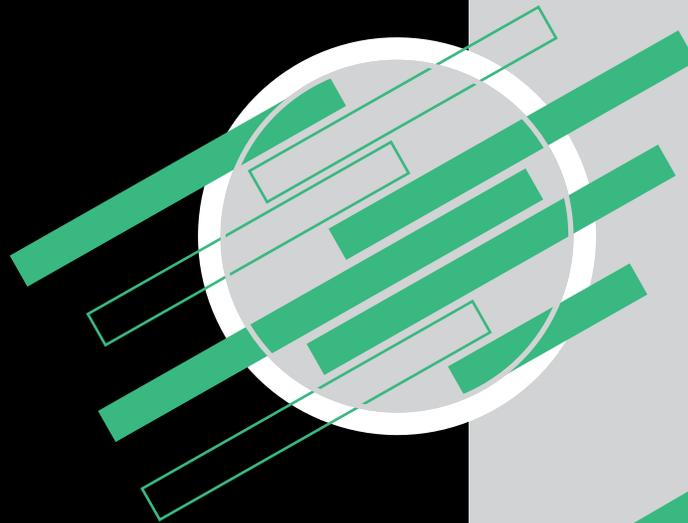


A Forrester Consulting
Thought Leadership Paper
Commissioned By Adobe

August 2020

How Digital Document Processes Are Shifting From Best Practice To Business Necessity



FORRESTER®

Table Of Contents

- 1** Executive Summary
- 2** 2020: A Paradigm Shift For Workplace Practices
- 3** Organisations Are Increasingly Recognising The Importance Of Digital Document Processes
- 6** Digitising Document Processes Unlock Business Opportunities
- 9** Digital Document Capabilities Are Becoming A Business Necessity
- 11** Key Recommendations
- 12** Appendix

Project Director:

Line Larrivaud,
Market Impact Consultant
Leon Zhang,
Associate Market Impact
Consultant

Contributing Research:

Forrester's CIO Professionals
research group

ABOUT FORRESTER CONSULTING

Forrester Consulting provides independent and objective research-based consulting to help leaders succeed in their organizations. Ranging in scope from a short strategy session to custom projects, Forrester's Consulting services connect you directly with research analysts who apply expert insight to your specific business challenges. For more information, visit forrester.com/consulting.

© 2020, Forrester Research, Inc. All rights reserved. Unauthorized reproduction is strictly prohibited. Information is based on best available resources. Opinions reflect judgment at the time and are subject to change. Forrester®, Technographics®, Forrester Wave, RoleView, TechRadar, and Total Economic Impact are trademarks of Forrester Research, Inc. All other trademarks are the property of their respective companies. For additional information, go to forrester.com.
[E-48476]



72% of respondents say that digital document processes enable their organisations to better maintain business continuity amidst unforeseen circumstances.



“Digital document technologies allow individuals to continue working off-site while protecting the content through secure processing.”

*Marketing senior manager,
financial service company,
Hong Kong*

Executive Summary

In just a few short months, a global pandemic has disrupted the way we work and live. Decision makers at organisations are being forced to rethink how they empower their remote workforce and continue to serve customers. This disruption is causing an acceleration in adoption of digital collaboration and productivity technologies, bringing digital document solutions with capabilities including file sharing, e-signatures, and cloud storage to the forefront.¹

How can these solutions support an agile workplace during a crisis? And how can they facilitate recovery? What are the implications for companies with minimal digital document processes?

Adobe commissioned Forrester Consulting to answer these questions by evaluating how digital document processes are supporting business resilience. Forrester conducted an online survey with 450 senior IT and business decision makers based in North America, Western Europe, and Asia Pacific (APAC) with responsibilities for digital document processing at their organisations. We found that as companies continue to acclimatise to virtual work en masse, it is increasingly important for employees and customers to share, review, sign, and store digital documents virtually and securely without the need for hard copies. Once considered a best practice, these capabilities are now becoming core functionality, and they will endure beyond the current crisis to become foundational elements of both the customer experience (CX) and employee experience (EX) moving forward.

KEY FINDINGS

- › **Digital document processes help organisations maintain business resilience.** Organisations are leveraging their digital document processes to serve their customers and increase employee productivity and collaboration while operating remotely. In light of the pandemic, 72% of respondents agree that digital document processes support business continuity amidst unforeseen circumstances.
- › **Digitising document processes reduces business risk and opens up revenue opportunities.** Organisations with digital document processes in place are better equipped to continue to operate remotely without interruption. Respondents from those organisations report 10 times less at-risk customers and two times less at-risk revenue than those with companies that do not have these solutions in place. Reaping the benefits of these solutions even more, 47% of respondents say that it is enabling them to pursue opportunities and gain new customers during the current crisis.
- › **Digital document processes are becoming standard practice and will help improve CX and EX in the long term.** New business imperatives have shifted the perception of digital document processes from operational tools to true enablers of good CX and EX. In fact, 54% of respondents predict that the benefits of increased employee collaboration will last beyond the pandemic, and 47% say the same about increased customer satisfaction.

2020: A Paradigm Shift For Workplace Practices

Ensuring business continuity during a global pandemic introduced a paradigm shift for organisations across industries and across the world. It required new workplace strategies to adjust to the new normal, which means some practices shifted from “nice to have” to business necessities. As organisations enter the recovery phase, some of these practices are here to stay as companies look to embrace a new future of work. Our study found that:

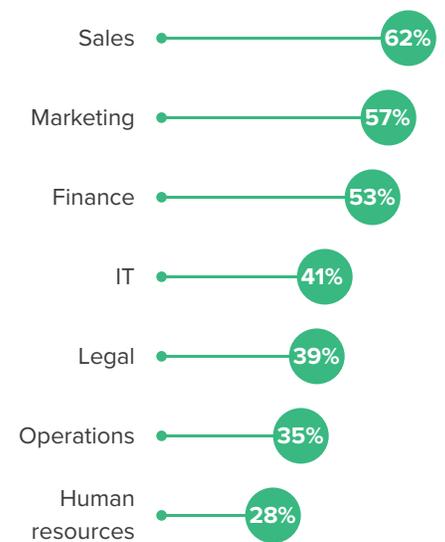
- › **The proportion of the workforce working remotely has skyrocketed, and it will stay that way.** Sixty-seven percent of the workforce is now working remotely on a regular basis.² That’s up from 20% pre-pandemic. As expected, remote work will continue to play a significant role post-pandemic, with respondents anticipating 39% of their workforce continuing to work remotely on a regular basis
- › **Organisations are adapting to the surge in remote workers by providing employees with more collaboration and productivity tools that improve document processes.** Sixty-four percent of respondents say their organisation has provided employees with technologies to assist or improve remote work, and another 30% say their organisation intends to do so within the next six months. This includes digital document processes, which half of the respondents (47%) say their organisations use today.
- › **The use of digital document processes span across departments.** Most respondents say their organisation uses a mix of paper and digital processes (72%), while organisations that are more digitally mature use digital processes exclusively (13%). Departments vary widely in their use of digital document processes with sales, marketing, and finance employing it the most, while human resources, operations, and legal use it to a lesser degree (see Figure 1). Considering the effects of paper processes becomes more pertinent as decision makers increasingly see digital document processes as required. For example, HR often sets the tone for an organisation’s EX, yet these departments use the most paper-based processes. This is especially prevalent in the higher education and life sciences industries where one in four (24%) HR departments uses fully paper-based processes.³
- › **New challenges are arising during the pandemic.** The crisis is bringing significant budget restrictions and adding an extra layer of complexity as respondents perceive greater challenges around training and change management in a remote work environment. To add, organisations also report regulatory and compliance risks impacting the deployment of digital document processes. This is despite the regulatory environments that promote and support the use of digital document processes in many jurisdictions. Increasing awareness of the regulations supporting the deployment of these solutions and weighing the implications of not deploying these solutions from both a customer and an employee point of view will help organisations avoid creating unnecessary barriers to adoption.



Figure 1

“To the best of your knowledge, to what extent are the following departments employing digital documentation tools?”

(Displaying “fully digital” answers)

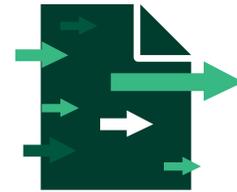


Base: 450 senior IT and business decision makers based in North America, Europe, and APAC with responsibilities for digital document processing at their organisation
Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, June 2020

Organisations Are Increasingly Recognising The Importance Of Digital Document Processes

In comparison to other digital transformation initiatives, digitising document workflows hasn't necessarily made the top of the priority list in the past. However, the pandemic has shifted how decision makers view these tools. While they've traditionally seen digital workflows as operational tools with the primary benefit of reducing printing and storage costs, they now consider them to be strategic imperatives to keep business moving. Our study found that:

- › **Decision makers increasingly see digital document processes as enablers of good CX and EX.** Forty percent of respondents say they link increased customer satisfaction and increased employee productivity during the pandemic with digital document processes, which is up from 28% pre-pandemic. Further, they say they anticipate this will last beyond the pandemic. Improving employee collaboration (54%) and increasing customer satisfaction (47%) rank among the top three benefits linked with digital document processes post-pandemic (see Figure 2).
- › **The shift to a virtual working environment has emphasised the role digital document processes play in maintaining business continuity.** The pandemic has brought to light the importance of features including document sharing, real-time collaboration, workflow automation, and e-signatures. Seventy-two percent of respondents say that digital document processes support business continuity amidst unforeseen circumstances, and 77% of respondents with organisations in North America say that e-signatures are very important or a critical requirement to supporting business resilience.
- › **Digital document processes are complementing other digital initiatives, not cannibalising them.** Decision makers now view digital document initiatives at much higher levels of importance, equal to or greater than previous leading initiatives such as expanding automation capabilities, moving to the cloud, and developing agile capabilities (see Figure 3). Due to the far-reaching business impact and potential for business acceleration of digital document processes, decision makers now see them as foundational elements required for continuity, agility, and ongoing resilience.
- › **Decision makers don't consider digital document processes as a "point solution" anymore, but as an integral part of their organisation's IT landscape.** Sixty-five percent of respondents say integrating digital document processes with everyday productivity applications is very important or a critical requirement. Digitising workflows holistically with end users in mind is helping organisations reap all the benefits from their modernisation initiatives.



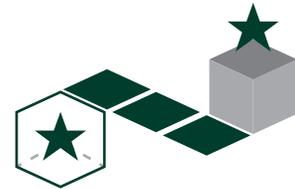
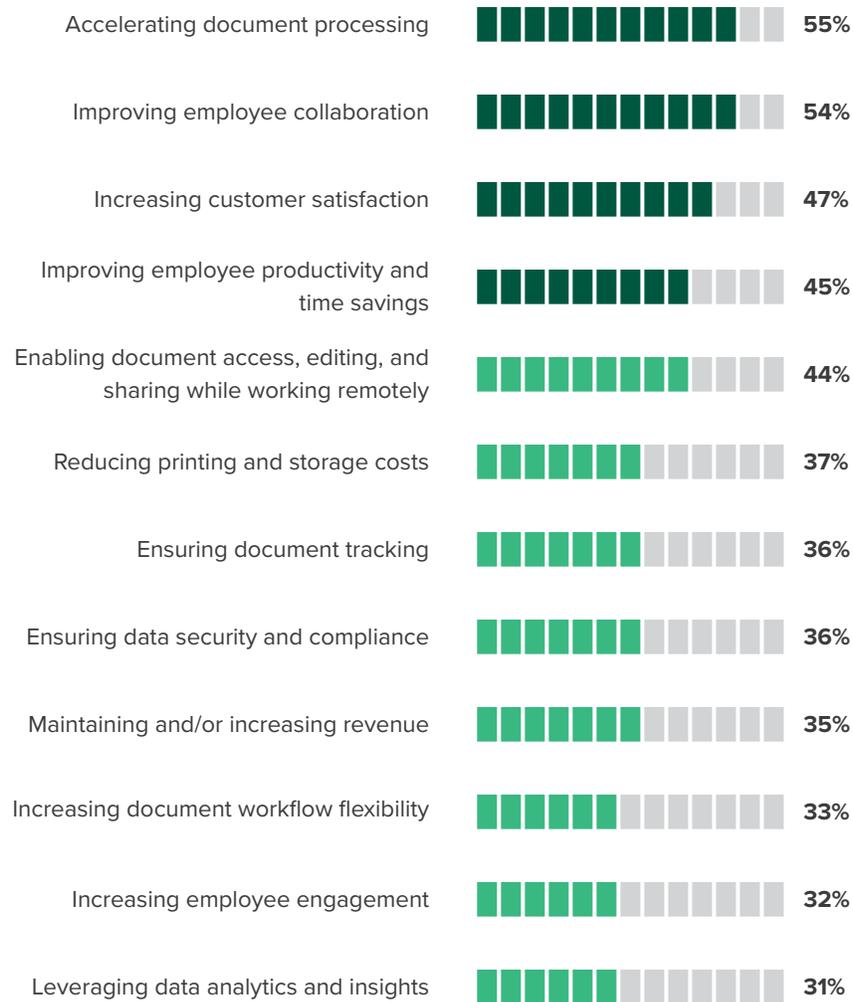
77% of respondents with organisations in North America say e-signature is very important or a critical requirement to support business resiliency.



Figure 2

“We’ve listed some of the benefits provided by digital document processes and tools below. In light of the COVID-19 pandemic, please select the most important benefits from these solutions to your organisation.”

(Displaying “pandemic recovery” answers)



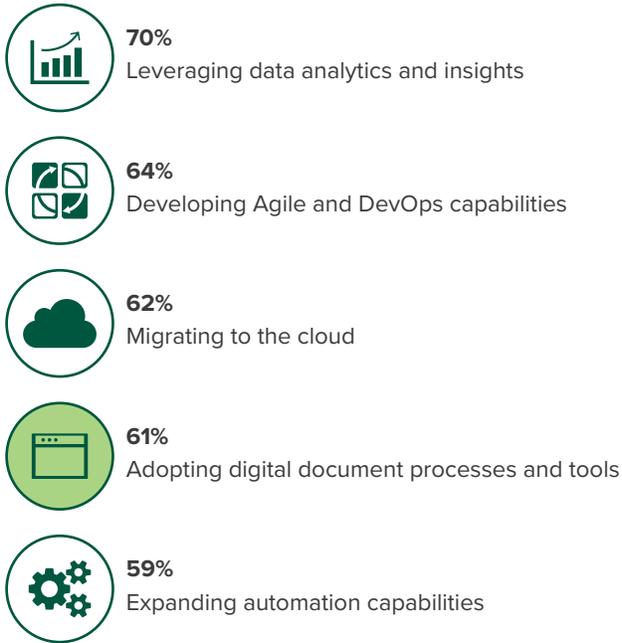
Organisations are reassessing the role of digital documentation processes, from operational tools to enablers of good CX and EX.

Base: 450 senior IT and business decision makers based in North America, Europe, and APAC with responsibilities for digital document processing at their organisation
Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, June 2020



Figure 3

“In your opinion, how important are each of the below initiatives and technologies in elevating your organisation’s digital maturity?” (Displaying “very important” and “critical requirement” answers)



Base: 450 senior IT and business decision makers based in North America, Europe, and APAC with responsibilities for digital document processing at their organisation

Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, June 2020



Digitising Document Processes Unlock Business Opportunities



The ability to maintain business continuity is dependent on digital document processes. The more that companies use digital document processes, the more agile and flexible they are to continue to serve their customers. As a result, companies exclusively using digital document processes are seeing a five times improvement in maintaining business continuity compared to companies with minimal or no digital document processes. Our study found that:

- > **Organisations with digital document processes have less business at risk than other organisations.** Respondents from organisations with digital document processes in place say their companies have 10 times less at-risk customers and two times less at-risk revenue than respondents from companies that do not have these solutions in place (see Figure 4).

Respondents from organisations with no digital document processes report **10x more at-risk customers** and **2x more at-risk revenue** than those from other companies.

Figure 4

“In light of the COVID-19 pandemic, and to the best of your knowledge, please indicate the percentage of at-risk customer and at-risk revenue at your organisation due to a lack of digital alternatives.”

| |  At-risk customers |  At-risk revenue |
|--|---|--|
| We mainly use manual and/or paper-based processes and have implemented minimal/no digital document processes. | 44% | 51% |
| We use a mix of paper-based and digital processes and tools for document management. | 23% | 37% |
| We mostly use digital document processes, but a number of our processes still require paper-based or manual steps. | 15% | 29% |
| We exclusively use digital document processes. | 4% | 27% |

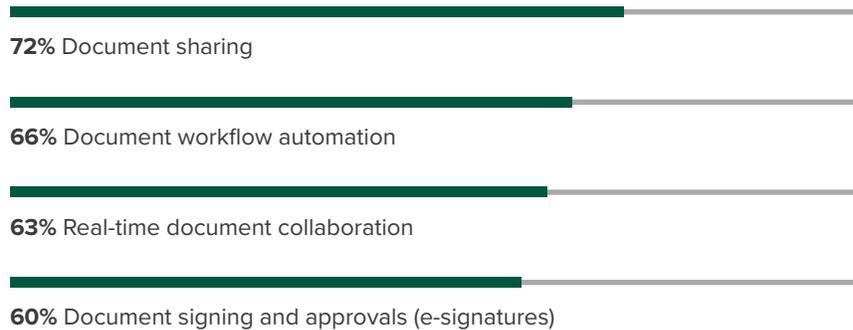
Base: 450 senior IT and business decision makers based in North America, Europe, and APAC with responsibilities for digital document processing at their organisation
 Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, June 2020



Figure 5

“In your opinion, which of the following features provided by digital document processes and tools are the most important in supporting your organisation’s business continuity and agility?”

(Displaying a selection of “very important” and “critical requirement” answers)



Base: 450 senior IT and business decision makers based in North America, Europe, and APAC with responsibilities for digital document processing at their organisation

Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, June 2020

- › **Digitising document processes better positions organisations to serve customers.** Features like document sharing, collaboration, automation, and e-signatures support business continuity by enabling organisations to serve their customers despite a lack of direct contact (see Figure 5). Companies with minimal digital document processes are missing a key enabler for serving customers and continuing to grow. Eighty-two percent (82%) of respondents with organisations that exclusively use digital documents say these capabilities allow their companies to continue serving customers to ensure business continuity versus only 15% from organisations with minimal digital documents capabilities. In addition, 47% of respondents with organisations that exclusively use digital document processes say these solutions enable their companies to pursue opportunities and gain new customers in light of the COVID-19 pandemic, versus only 9% from organisations with minimal digital documents capabilities.
- › **Digital document workflows accelerate business.** Manual or paper-based tasks slow processes, therefore they slow business. That is particularly true during this pandemic as many respondents (56%) say they see accelerating document processes as one of their organisation’s biggest challenges to keeping the business running. Digitising document workflows is foundational in helping organisations overcome that obstacle. In fact, 55% of respondents rate accelerating document processing as the most important benefit coming from these solutions post-pandemic.
- › **Digital document processes boost employee productivity.** An alarming 97% of respondents from organisations with minimal digital document capabilities are seeing a negative impact from the pandemic on employee productivity, compared to only 18% of respondents from more advanced organisations (see Figure 6). Having digital document processes that support both at-work and work-from-home environments clearly makes a difference in an organisation’s ability to maintain employee productivity.

Companies that exclusively use digital document processes are seeing **5x more improvement** in maintaining business continuity than companies with minimal or no digital document processes.

› **Conducting document processes online improves employee collaboration and engagement.** Research from the Forrester Employee Experience Index™ (EXi) shows that having an environment where employees can be productive and get their work done is a key predictor for employee engagement.⁴ Digital document processes play a key role here. Forty-five percent of respondents say that digital document processes are improving employee productivity, and 64% say the processes enable effective collaboration for remote workers. More specifically, the pandemic is accelerating user adoption of specific features such as document sharing (77%), cloud storage (73%), mobile access (64%), and e-signatures (58%). These functionalities are having a direct impact on the quality of EX as one out of two respondents (45%) link digital document processes with increasing employee engagement during the pandemic.



Only 18% of respondents from organisations with advanced digital document capabilities see remote working negatively impacting employee productivity, vs. 97% from less-advanced organisations.

Figure 6

“Please indicate whether you agree or disagree with the following statement.” (Displaying “agree” and “strongly agree” answers)



“The lack of adequate technology and tools is impacting employees' productivity in this virtual workforce environment.”



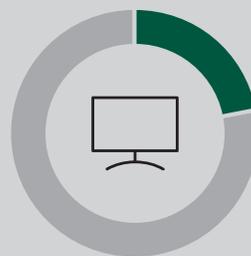
97%

Of organisations with minimal/no digital document processes, and mainly using manual and/or paper-based processes.



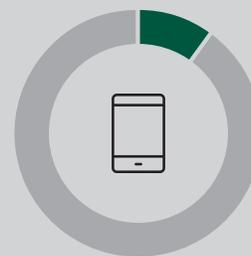
72%

Of organisations using a mix of paper-based and digital processes and tools for document management.



22%

Of organisations mostly using digital document processes, but with a number of processes still requiring paper-based or manual steps.



10%

Of organisations exclusively using digital document processes.

Base: 450 senior IT and business decision makers based in North America, Europe, and APAC with responsibilities for digital document processing at their organisation

Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, June 2020

Digital Document Capabilities Are Becoming A Business Necessity

In the wake of the pandemic, online interactions augment — and in many instances — replace in-person interactions. In response, organisations are accelerating their adoption and expansion of technologies that facilitate serving customers virtually and support their distributed workforce. With these new imperatives, digital capabilities that decision makers once considered “nice to have” are shifting to become standard protocols. Our study found that digital document workflows is one of these, playing a foundational role in enabling mission-critical activities while yielding benefits across CX and EX.

- Despite global economic uncertainty, expansion of digital document processes is set to continue.** In fact, one out of two respondents say their organisation is planning to implement or expand its use of these solutions in the next 12 months (see Figure 7) and increase spend by 55%. In addition, 58% of respondents say the pandemic has caused their organisation to accelerate adoption of e-signature capabilities. This is a significant increase at a time when business leaders are tasked with reducing spend



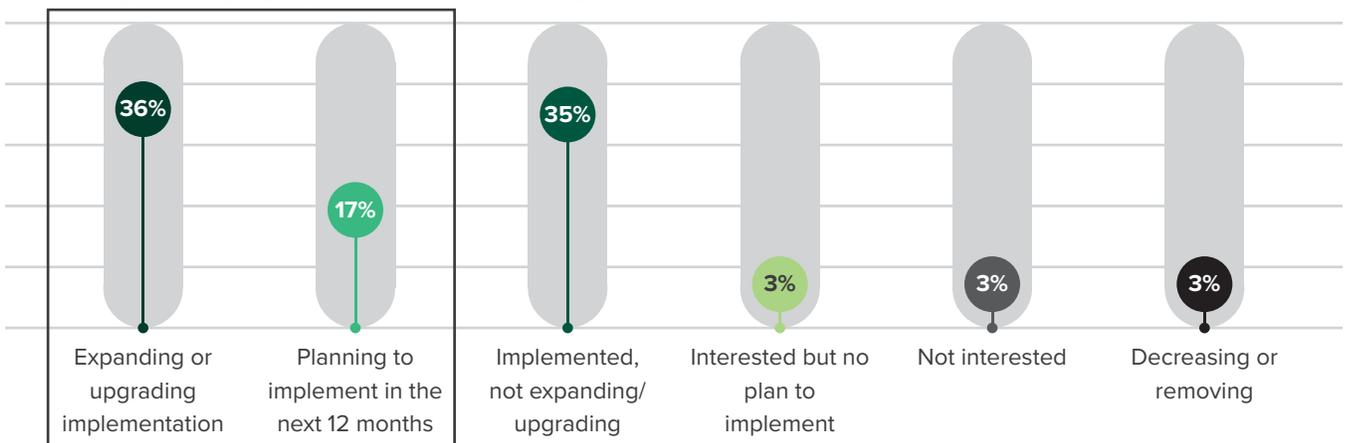
“We are seeing an acceleration in user adoption of digital document processes. The key factor driving it is the need to increase collaboration and keep projects moving.”

HR Director, advertising and marketing company, Germany



Figure 7

“What are your company’s plans when it comes to digital document process solutions over the next 12 months?”



Base: 450 senior IT and business decision makers based in North America, Europe, and APAC with responsibilities for digital document processing at their organisation

Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, June 2020



- › **Companies with minimal digital document processes are also expanding their capabilities.** Among respondents with organisations that do not consider digitising document workflows a “standard protocol” today, 71% report that this attitude is changing. Similarly, among the respondents from companies that do not consider e-signatures to be a best practice, 46% say this is now shifting to become a standard protocol. The pandemic has unlocked and accelerated opportunities for these organisations, revealing the benefits of using fully digital workflows for everything from document processing to delivering quality EX and CX. The perception at these organisations is now evolving, and decision makers are beginning to consider these solutions as critical/foundational infrastructure required to conduct day-to-day business.
- › **Digital document processes implemented today will endure to become part of CX and EX post-pandemic.** Sixty-six percent of respondents say their organisation’s customers want improved digital alternatives and interactions. A similar number of respondents recognise that their organisation’s employees also want more digital alternatives to perform their day-to-day work (see Figure 8). Companies leveraging digital document processes offer more choices to their customers and employees, show that decision makers listen to their needs, and establish stronger connections.

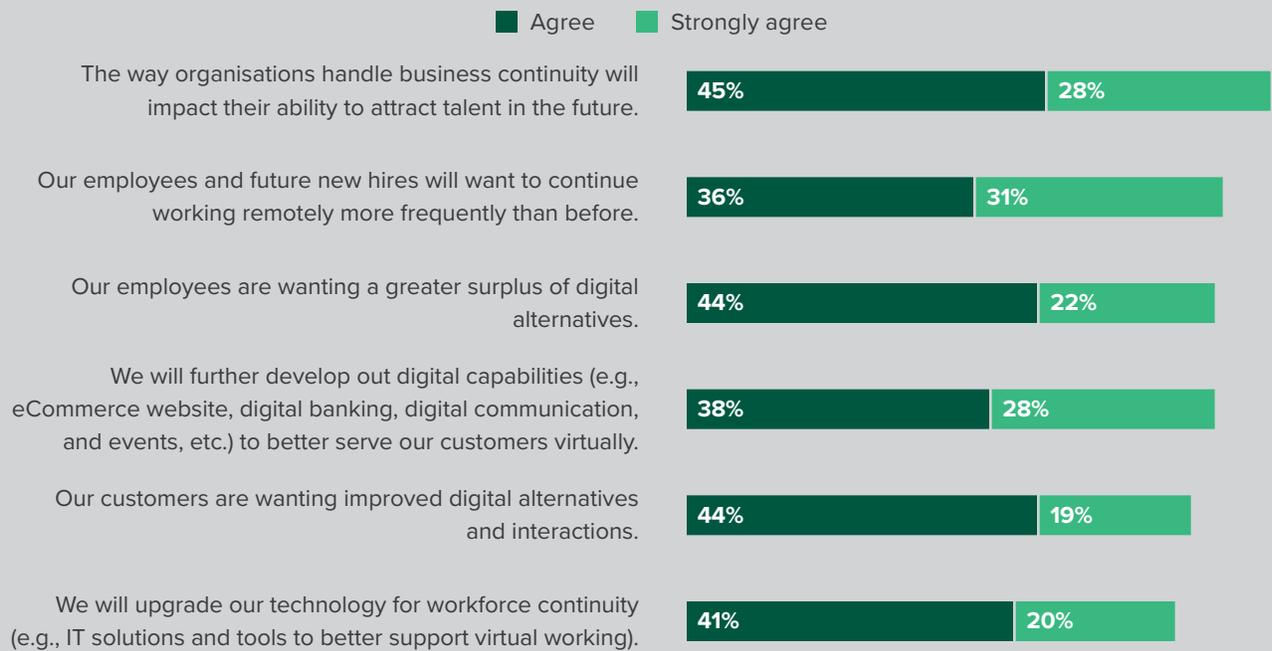
“When using digital document processes there is no need for printing, scanning, or meeting up in person. This saves time and improve employee productivity, but it also helps us follow social distancing guidelines.”

IT director, education institution, US



Figure 8

“Please indicate whether you agree or disagree with the below statements.”



Base: 450 senior IT and business decision makers based in North America, Europe, and APAC with responsibilities for digital document processing at their organisation
 Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, June 2020

Key Recommendations

The global pandemic is proving the importance of digital document processes. Forrester's in-depth survey of 450 senior IT and business decision makers based in North America, Europe, and APAC yielded several important recommendations:



Recognise the importance of digital document processes for protecting business and better serving customers. Organisations must recognise the value that digital document processes provide in underpinning their business resilience efforts and understand their contributions to full digital maturity. In this respect, digital document processes are foundational tools that are cost-effective and quick to implement, whereas more complex digitisation initiatives take some time to provide benefits.



Remember that digital document processes are as valuable in the front office as they are in back office. Failing to digitise both front- and back-office departments and processes will erode the benefits of these solutions. Organisations should seize the opportunity now and identify key use cases in every department that slow or delay business value due to manual or paper-based steps. Applying digital document solutions to enable collaboration, sharing, e-signing, and cloud storage brings immediate benefits.



Digital document solutions are sound investments that address both immediate and long-term needs. Given current uncertainties, technology leaders must be cognizant of their company's situation, revenue outlook, and resources as they adjust budgets during the pandemic. They must look to prioritise projects, processes, and technologies that focus on business resilience or new ways of working. Digital document processing solutions address both these elements, which makes continued investment in these capabilities a sound choice during these challenging times.



Ramp up digital workplace skills. Business and technology leaders must take a human-centric approach when digitising document processes. They should support change management with innovative rollout and training programs adapted to remote working in order to assist their workforce and their customers and to become more fluent with sharing documents, using e-signatures, and working in collaborative environments.

Appendix A: Methodology

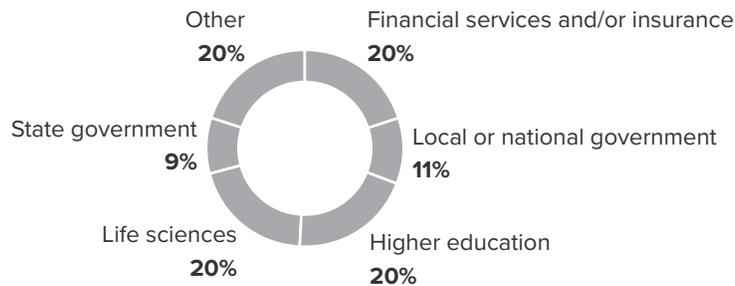
In this study, Forrester conducted an online survey of 450 senior IT and business decision makers based in North America, Europe, and APAC with responsibilities for digital document processing at their organisation to explore how digital document processes are supporting business continuity. The study began in May 2020 and was completed in June 2020.

Appendix B: Demographics

COMPANY SIZE



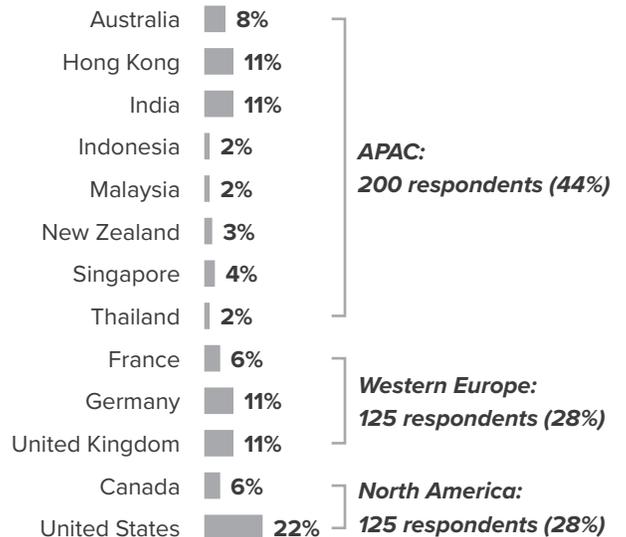
INDUSTRIES



RESPONDENT DEPARTMENT



GEOGRAPHIES



Base: 450 senior IT and business decision makers based in North America, Europe, and APAC with responsibilities for digital document processing at their organisation

Note: Percentages may not total 100 because of rounding.

Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, June 2020

Appendix C: Supplemental Material

RELATED COMMISSIONED RESEARCH

[“Digital Document Processes In 2020: A Spotlight On APAC,”](#) a commissioned study conducted by Forrester Consulting on behalf of Adobe, August 2020.

[“Digital Document Processes In 2020: A Spotlight On Western Europe,”](#) a commissioned study conducted by Forrester Consulting on behalf of Adobe, August 2020.

[“Digital Document Processes In 2020: A Spotlight On Financial Services,”](#) a commissioned study conducted by Forrester Consulting on behalf of Adobe, August 2020.

[“Digital Document Processes In 2020: A Spotlight On E-Signatures,”](#) a commissioned study conducted by Forrester Consulting on behalf of Adobe, August 2020.

RELATED FORRESTER RESEARCH

“Center Your COVID-19 Recovery Planning Around Employee Understanding,” Forrester Research, Inc., June 17, 2020.

“The Pandemic Recession Demands A Digital Response,” Forrester Research, Inc., June 25, 2020.

“Your Automation Psychology And Roadmap Just Shifted Gears,” Forrester Research, Inc., May 29, 2020.

Appendix D: Endnotes

¹ Digital document solutions include any processes, workflows, or platforms to manage the creation, collaboration, distribution, and storage of digital documents and records within the guardrails of corporate policies. This includes solutions that allow for reading, editing, signing, and sharing of PDFs and other documents.

² Working remotely: Workforce (e.g., home worker, teams split geographically, etc.) working remotely on a regular basis (e.g., at least once a week).

³ For instance, 20% of life sciences clinical trial enrolment processes, 19% of higher education enrolment and admissions forms, and 18% of higher education faculty and staff contracts are fully paper-based.

⁴ Source: “Introducing Forrester’s Employee Experience Index,” Forrester Research, Inc., February 14, 2019.