

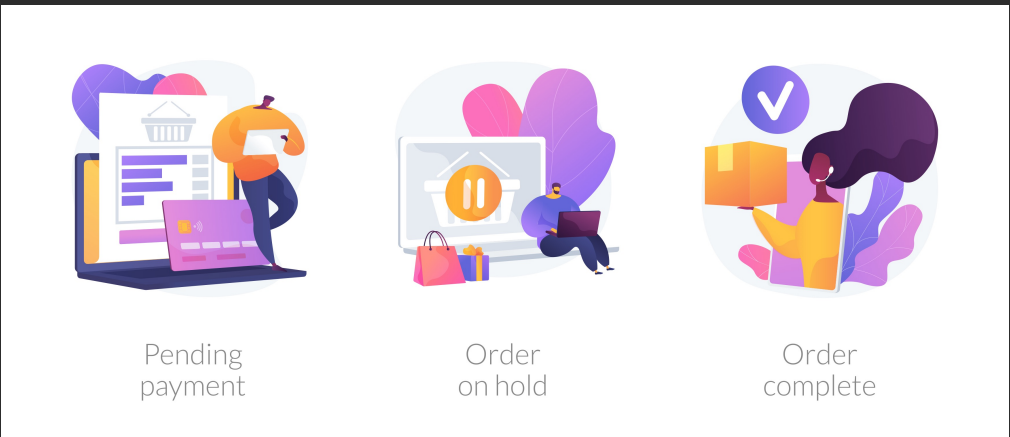
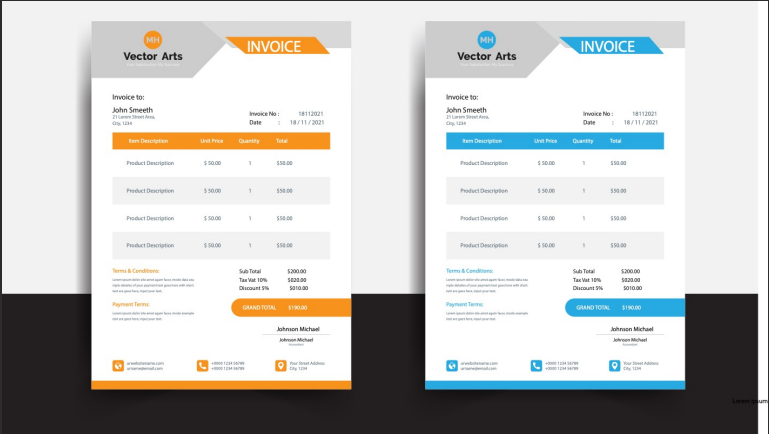


# Social Distancing Friendly: Using Digital Forms in AEM

Soumitra Dhankar | Manager Solutions Consulting, Adobe  
Speaker #2 | TBC

**EXPERIENCE MAKERS** LIVE

# Social Distancing is the new normal in any business



# Partially digitizing Forms and Documents has helped organizations



Enrollment



Onboarding



Communications



Servicing

**Customer  
Journey**

Eligibility,  
Applications, Signatures

Status Letters, Welcome Kits,  
Contract Documents,

Monthly statements,  
account notices

Change Account Details,  
Claims & Reimbursements

**Your  
Organization**

Create enrollment  
webforms/PDFs

Process PDF applications,  
manually

Deliver scheduled or  
on-demand emails, letters  
as PDF attachments

Webforms/PDFs available  
on websites

# But key challenges remain unresolved



## Too Many

Organizations easily have over thousands of forms to manage across departments



## Too Slow

The amount of time it takes to modernize the entire form collection is intimidating



## Too Expensive

Solving by an in-house DIY solution can become very costly with scale

Time for a better solution to modernize your forms.



# Need of the hour: A solution that modernize forms



## Create Forms Rapidly

Leverage AI/ML driven Automated Forms Conversion to convert batches of PDF into adaptive forms



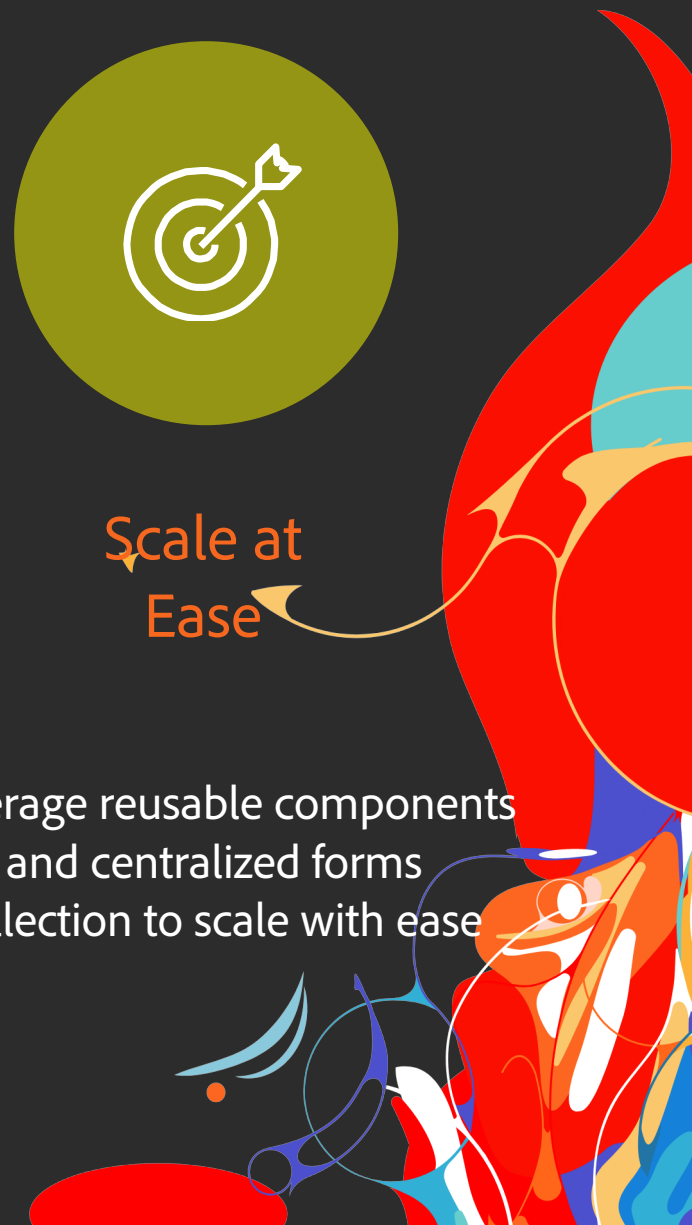
## Improve Operational Efficiency

Empower business user to manage forms with user-friendly UI  
Reduce reliance on IT resource



## Scale at Ease

Leverage reusable components and centralized forms collection to scale with ease



# Key Capabilities Desired



## Cross-channel Optimization

Ability to render forms across all devices and form factors



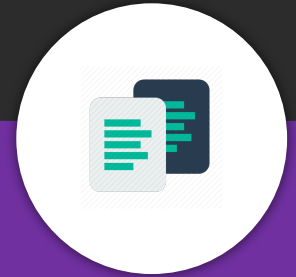
## Business-friendly, Authoring

Visual drag & drop form creation, workflow authoring & integrations



## Data-driven Insights

Gauge Form efficiency, experiment with multiple form versions



## Interactive Communications

Dynamic, drill-down charts and tables embedded in the forms

# Adobe Experience Manager Forms Overview

Adobe Experience Manager Forms is a modern experience management solution that streamlines digital forms journeys by digitizing paper-based processes to deliver omnichannel personalized experiences at scale.



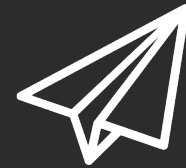
## Digital Forms & Data Capture

Streamlining the form-filling experience across channels for digital enrollment



## Customer Communications

Personalizing on-going touchpoints through engaging communications

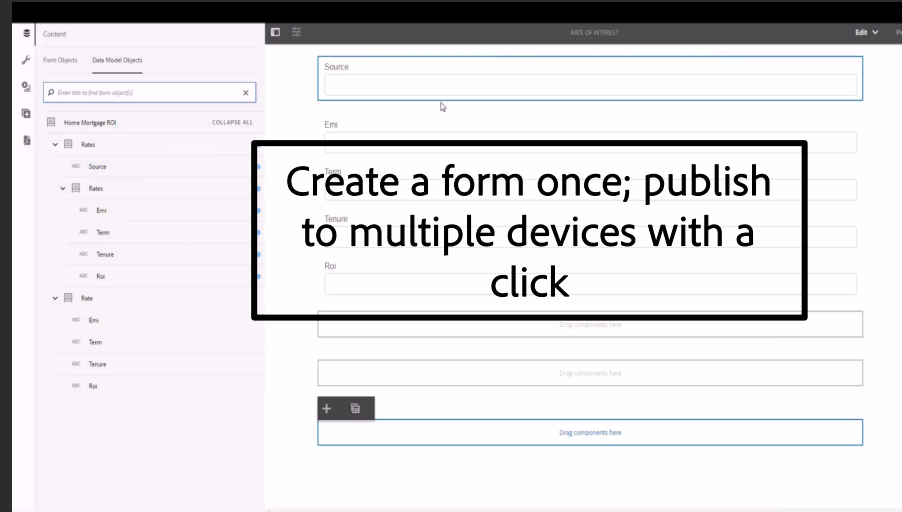


## Document Services

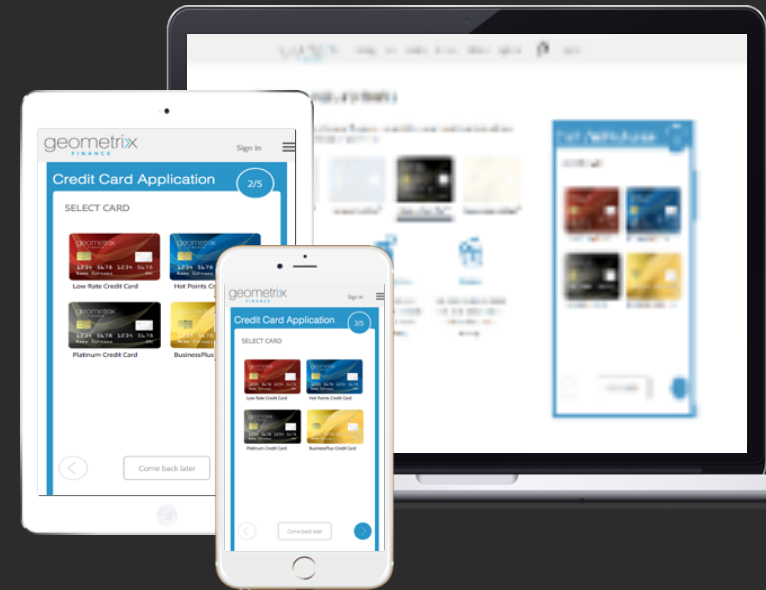
Supporting document generation and archiving needs with built-in security

# Cross Channel Optimization

- Author one format and publish across desktop, mobile, tablet & app
- Multi-device preview ensures layout is optimized for all devices
- Responsive elements **adapt for screen sizes**
- Extend forms to iOS, Android, Windows smartphones & tablets

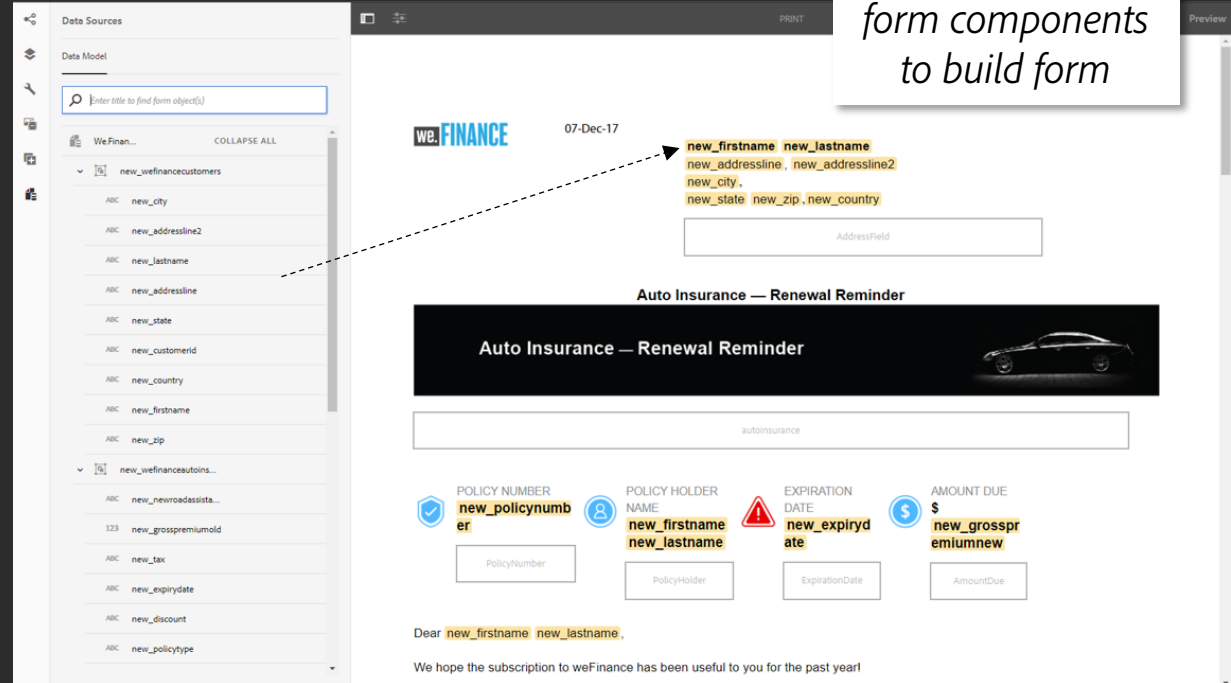


The screenshot shows a form builder interface. On the left is a 'Content' sidebar with a tree view of form objects: 'Form Objects', 'Data Model Objects', 'Home Mortgage FDI', 'Rates', 'Rate', 'Term', 'Tenure', and 'Roi'. The main area displays a form with fields for 'Source', 'Term', 'Roi', and 'Tenure'. A text box overlay in the center reads: 'Create a form once; publish to multiple devices with a click'. At the bottom, there are two 'Drag components here' sections with a plus icon and a trash icon.



# Business Friendly Authoring

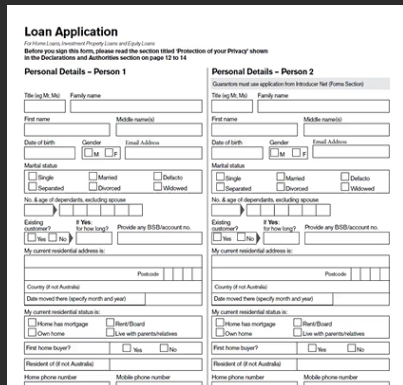
- **Drag and drop authoring** makes it easy for even business users to author forms
- Centralized library with **re-usable form & document fragments** for faster authoring
- **Theme Editor & templates** ensure consistency across brands and channels
- **Visual Rule Editor** to add logic in form fields without coding





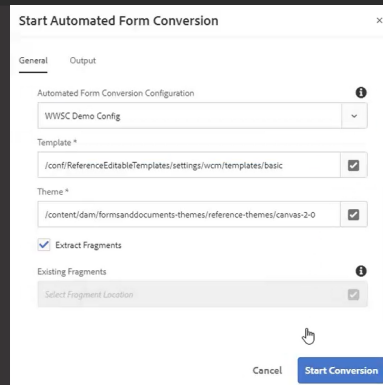
# Automated Form Conversion

- AI/ML enables batch conversion of existing PDF & XDP files to adaptive forms
- Extract re-usable form components and data schemas for scalability
- Apply templates and themes for consistent brand experience across forms collection
- Add automatic document of record generation



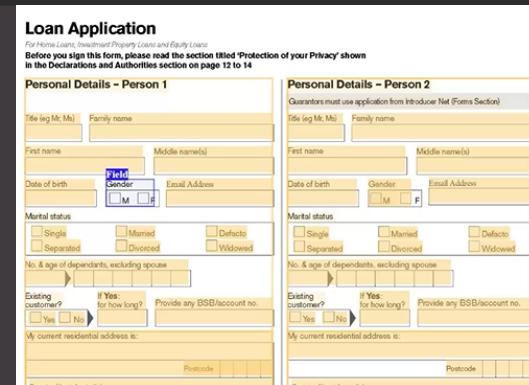
The image shows a standard PDF form titled "Loan Application". It contains two main sections: "Personal Details - Person 1" and "Personal Details - Person 2". Each section includes fields for name, date of birth, gender, email address, marital status, and residential address. There are also checkboxes for marital status (Single, Married, Divorced, Widowed) and sections for existing customers and BSB/account numbers. The form is presented in a static, non-interactive layout.

Upload PDF/XDP



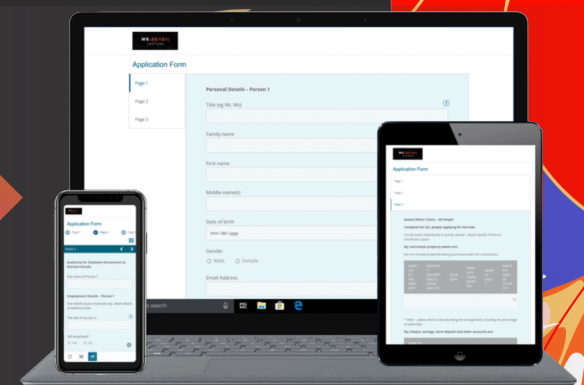
The image shows a configuration window titled "Start Automated Form Conversion". It has two tabs: "General" and "Output". Under "General", there is a dropdown for "Automated Form Conversion Configuration" set to "WWSOC Demo Config". Below that, there are two checkboxes for "Template \*" and "Theme \*", both of which are checked. Under "Output", there is a checkbox for "Extract Fragments" which is checked, and a section for "Existing Fragments" with a "Select Fragment Location" button. The window has "Cancel" and "Start Conversion" buttons at the bottom.

Set up Configuration  
AI Conversion



The image shows the same "Loan Application" form, but now it is an adaptive form. The fields are highlighted with yellow borders, and the form is designed to be responsive. The layout is clean and modern, with clear labels and input fields. The form is presented in a static, non-interactive layout.

Review & Adjust



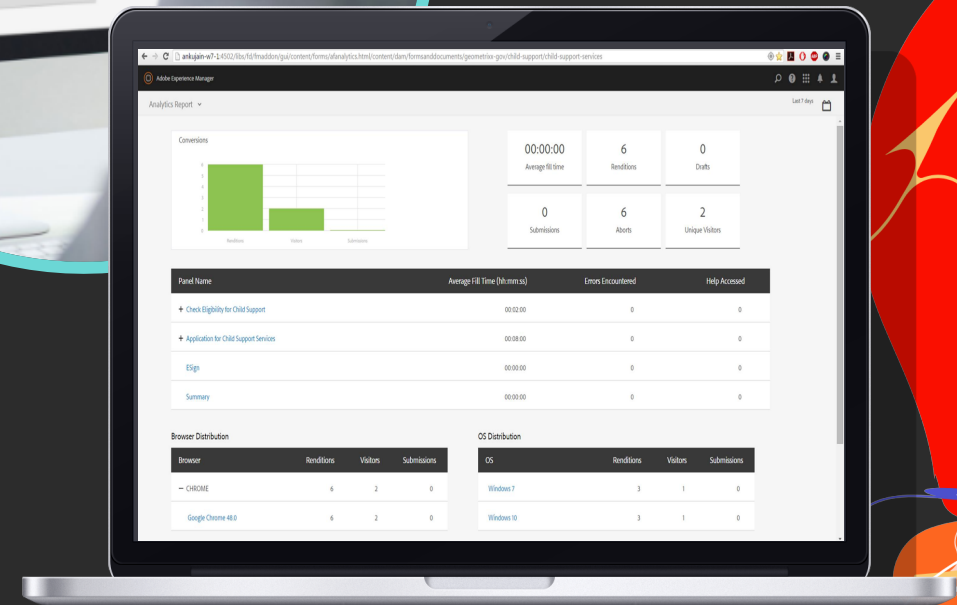
The image shows the adaptive form displayed on multiple devices: a laptop, a tablet, and a smartphone. The form is responsive and adapts its layout to the screen size of each device. The form is presented in a static, non-interactive layout.

Mobile-responsive  
Adaptive Form



# Data Driven Insights

- Forms measurement via Adobe Analytics\* offers granular visibility into form usage
- Customizable dashboard identifies drop-off points in enrollment and areas for improvement
- Design and run A/B tests via Adobe Target\* to optimize form enrollment on every channel
- Embed personalized offers in forms and documents via rules-based targeting via Adobe Target



# Interactive Communications

The customer journey doesn't stop with a form. Make every touch point count.

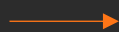
- Scale the mobile adaptive experience from acquisition to communications
- Ensure the customer experience is consistent, even with on-going self services
- Personalized, engaging customer communications create opportunities for cross-sell/ upsell



Customer onboard



Welcome Kits



Monthly Statements



On-going support and services

# AEM Forms: Key Capabilities



## Cross-channel Optimization

- ✓ Mobile-optimized forms with data pre-fill, with save & resume
- ✓ Mobile app for offline data capture for field workers
- ✓ Workflows & routing, with compliant e-signatures



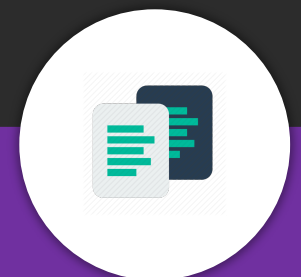
## Business-friendly, Authoring

- ✓ Centralized authoring with reusable components, styles, and themes
- ✓ Connectors to RDBMS, CRM, and other systems of record
- ✓ Visual drag & drop forms, documents, workflows, & integrations



## Data-driven Insights

- ✓ Measure usage and analyze field-level abandonment
- ✓ Embed personalized offers and content in statements and communications
- ✓ A/B testing to continuously improve

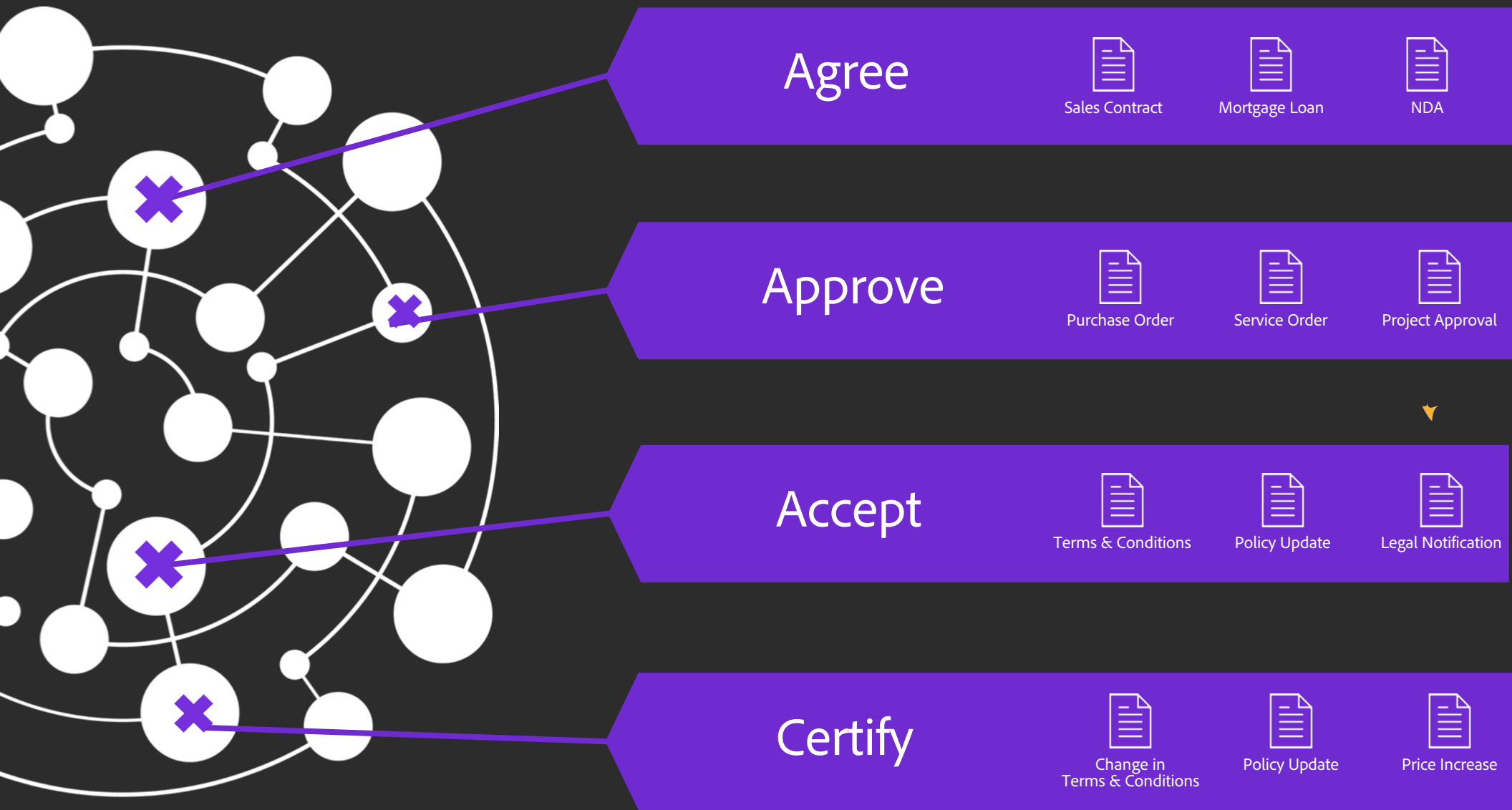


## Interactive Communications

- ✓ Batch & on-demand communications across web, mobile, print
- ✓ Dynamic, drill-down charts and tables embedded in communications
- ✓ PDF output for archival and compliance



# Complete the last mile execution for your Form with Adobe Sign



# AEM Forms Use Cases across functions



## CRM

### Sales

- Contracts and agreements
- Proposals and quotes
- Application forms

### Customer Service

- Service & work orders
- Field service forms & acknowledgements

### Marketing

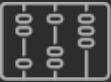
- Customer enrollment
- Marketing contracts
- Release forms



## HRIT

### Human Resources

- Employee onboarding & off-boarding
- Benefits enrollment
- Employee policies



## PROC

### Procurement

- Supplier contracts
- Requests For Proposal (RFPs)
- Vendor onboarding

### Resources

- Lease & facilities agreements
- Request-for-service forms
- Facilities planning

### IT & Operations

- Change authorization
- Vendor agreements
- Asset management



## Others

### Legal

- Contract management
- Nondisclosure agreements
- Policy management

### Product Management

- Change authorization
- Requirements acceptance
- Roadmap approval

# AEM Forms Use Cases across businesses

## B2B

- **CUSTOMER EXPERIENCE**
  - Terms and Conditions
  - Financing agreements
  - Service Centers
  - Warranty certificates
- **PARTNER PORTAL**
  - Consent Management
  - Survey Consent Management
  - Privacy Consent
  - Terms and Conditions
  - NDAs

## B2C

- **HUMAN RESOURCES**
  - Transfer Agreements
  - Policy Acknowledgements
  - Candidate NDA's & Offers
  - Contractor agreements
  - Benefits servicing (tax, leave, 401K, CoA, direct deposit, coverage)
  - Employee Training Certifications
- **IT/SOURCING**
  - Data Standards Approvals
  - IT Risk-related contracts
  - Vendor agreements
  - Security sign-offs
  - Equipment/Application approvals
  - Data center access

## Operations

- **IT**
  - Project budget approvals
  - Asset management
  - Change authorizations
  - Requirement signoff
  - Access management
- **Procurement**
  - Bill of Materials
  - Product Requirements
  - Manufacturing Build Package
  - Purchase orders
- **Human Resources**
  - Onboarding documents
  - Time off management
  - Offer letters
  - New hire packages
  - Benefits enrollment
- **Finance**
  - Pay stub acknowledgements
  - Travel/spend authorization
  - Reimbursement requests
  - Invoice approval/processing
  - Budget approvals
- **Finance**
  - Contracts (MSA, etc.)
  - Agreements (T&C review)
  - Legal case management
  - Compliance (ISO 27001, SOC, PCI DSS, HIPAA, 21 CFR, GDPR, FedRAMP)
- **Facilities**
  - Inspection Guidelines
  - Work orders
  - Lease agreements
  - Parking permits
  - Facility inspections

# AEM Forms ROI

On average, organizations saw a **379% ROI** with AEM Forms with below benefits:

- 20% Lower form/document abandonment rate
- 56% Faster time to update forms/documents
- 63% Faster time to author new form/document
- 66% Higher productivity for teams using AEM Forms

Time to Breakeven

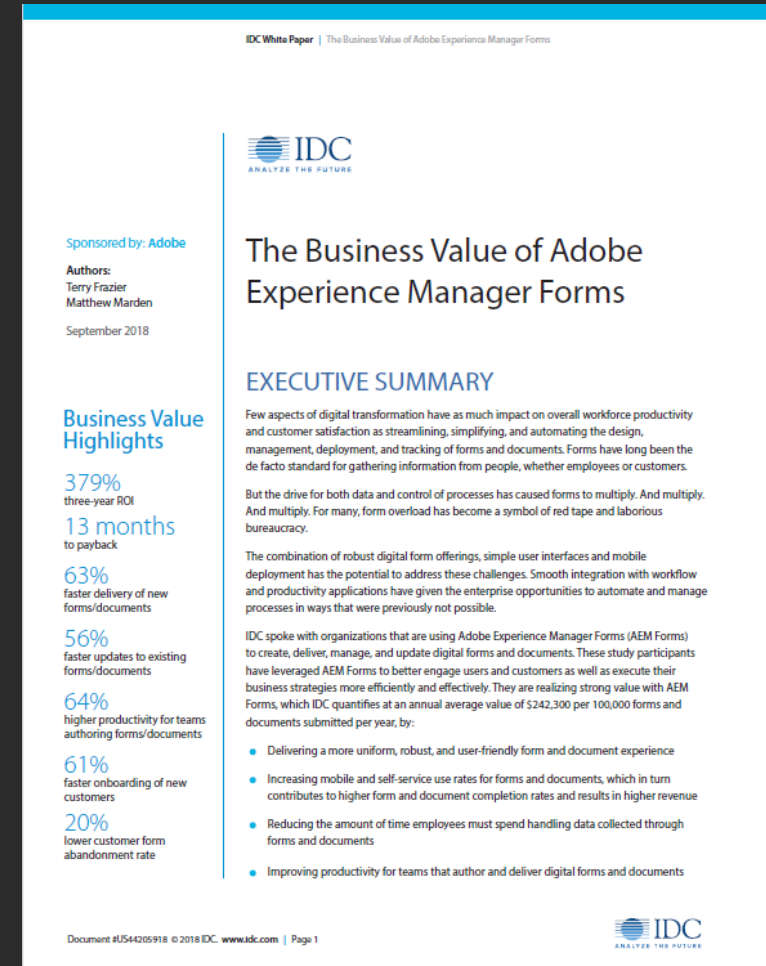
 **13** Months

Additional Annual Revenue\*\*

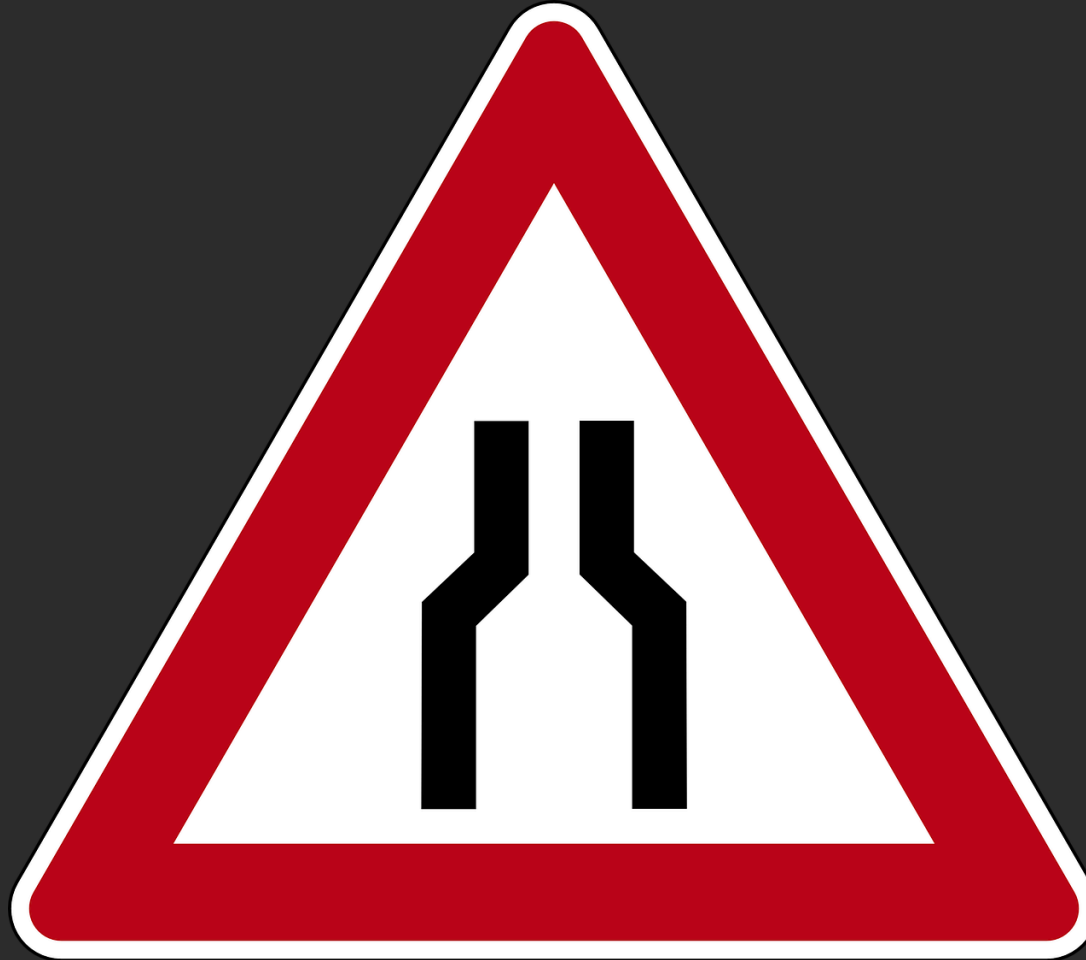
**\$1.73M**

Value of Higher Productivity

**\$3.42M**



**Forms may be the biggest bottleneck in your digital transformation**





# WE CAN HELP: Reach out to us for

1

Forms Digitization  
Strategy

2

Forms Modernization  
Assessment

3

Digital Process  
Runbook



