

How to select the right enrollment and forms management solution.



Creating positive, seamless enrollment experiences for your customers can be mission critical to your overall business success. But enrollment form creation and management becomes increasingly complex as the number of forms you deal with grows, especially if you're competing in a regulated industry. Every organization is at a different point in their ability to increase enrollment completion rates and meet customers' high expectations for streamlined digital processes. Likewise, every organization has different levels of familiarity with relevant requirements and capabilities to look for when investing in a new forms management solution that can improve their customer enrollment journeys.

Wherever you are in your enrollment and forms management journey, investing in the right solution is a pivotal decision that will have significant short-term and long-term impacts to your customers and business. Reaching the best decision for your organization will take considerable time and effort that will likely involve substantial research and evaluation. To help you in that process, this guide covers some of the most important questions you should ask and issues you should carefully investigate. It also provides tips for navigating the information and targeted marketing you'll encounter along the way to help you make informed, objective assessments of the solutions you evaluate.

1. Scalable, content-first approach.

As modern customers move toward a mobile-first, omnichannel preference, form management solutions make it relatively easy to design a mobile-responsive form. However, scaling this consistent experience across hundreds of forms or multiple channels and devices can be very difficult. This is typically because such solutions

don't take a content-first approach that enables scalability with ease and consistency.

Instead of just allowing you to design a form, add some labels, and integrate with a few critical systems, a content-first forms management solution lets you easily manage, reuse, and connect hundreds or thousands of forms. This enables you to go to market quickly with consistent, accurate forms—and it opens the door to a variety of robust, content management–aligned capabilities.

POTENTIAL GOTCHA:

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

One of the main tests of a forms management solution's capabilities is how it handles changes in content. For example, if you have a certain text block that exists in dozens of your form templates, can you edit that text once and automatically propagate those changes to all of those templates? If you need to manually edit each template, it will take extensive time and effort when changes need to be made. This is why solutions with content shortcomings seriously hinder scalability.

Another way to measure a solution's content-first capabilities is the way it supports content integration points. For example, you might have certain fields in your forms, such as customer name, that get pre-populated from a connection to your customer relationship management (CRM) database or some other system. If you want to change the labels on those form fields or change which data fields are mapped to those labels, a content-first solution will let you implement such changes centrally in a single step, instead of having to make those changes manually in each of the affected templates.

A related content management capability to look for is the ability to easily convert your paper-based or PDF forms into a digitized format that is mobile-responsive and adaptive to the requirements of various formats. Such a capability requires the help of artificial intelligence (AI) or machine learning. Advanced solutions leverage AI and machine learning to automatically identify common form and data elements and convert your PDF forms into mobile-responsive digital forms—which saves massive time and effort.

Question 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?

Question to ask:

Can the solution automate conversion of your legacy forms to mobile-responsive digital forms? You can't hope to meet the high expectations of digitally savvy customers if you haven't yet moved your forms to digital.

2. Personalized customer experiences.

The main goal with enrollment processes is to increase conversion rates. Enrollment experiences that engage customers and reduce abandonment can have a dramatic impact on revenue. It's critical to think beyond the simplistic definition of a form and recognize that what you're really doing is creating an experience that is the foundation for the entire customer journey. This is why being able to deliver personalized enrollment experiences is so critical. To help with that, different forms management vendors deliver different levels of personalization. Nearly all vendors let you brand your forms with your logo, but you need much deeper personalization to move the needle.

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. An even more important requirement is the ability to add custom imagery developed by your creative teams to your forms. Using your own creative assets allows you to more completely align your enrollment process with your brand.

But those two capabilities on their own can only take you so far. 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 can tie into a robust digital asset management (DAM) platform.

Forms management and DAM integration allows you to easily push your existing creative assets into enrollment forms, ensuring brand consistency across all touchpoints. And if updates occur to any of those assets, your forms should be automatically updated with those changes too. That requires integration with a DAM that provides central control and visibility over assets, as well as automation of workflows and tedious tasks. Only with those capabilities and integrations can you gain the flexibility needed to customize every aspect of your enrollment process at scale, deliver the personalized end-to-end experiences customers crave, and achieve the conversion rates your business wants.

POTENTIAL GOTCHA:

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.

Questions to ask:

Is the solution limited to static forms, or can it enable us to dynamically personalize and optimize enrollment experiences based on what we know about each individual customer?

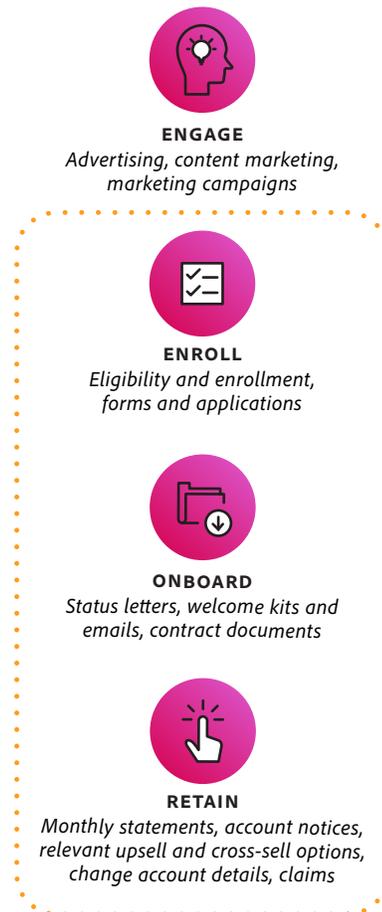
3. Open extensibility.

Enrollment processes need to be connected to enterprise databases and systems. Forms should not exist in silos. A typical use case is the ability to pre-populate a form using CRM data. That's why many forms management solutions have some level of integration with either Salesforce or Microsoft Dynamics. Unfortunately, for most solutions, the out-of-the-box integrations stop there. Going beyond either of those solutions often requires a professional services engagement. For a few solutions, custom development is the only way to get needed integrations.

Some customers make the mistake of thinking that since they have one popular business system, they just need to make sure their forms management solution only supports that integration. Initially that may be true, but as your enrollment processes grow and evolve, you will need to pull in data from different types of systems, such as enterprise resource planning, product information management, e-commerce platforms, internally developed legacy systems, and more.

That's why it's important to look beyond a forms management solution that comes with several out-of-the-box connectors to business systems. More importantly, it's best if the solution has an open design that makes it easy to connect to any back-end system with minimal effort. Solutions built on an open-source technology that provide multiple integration protocols is a big advantage in this area.

Personalization throughout the customer journey.



Question to ask:

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

POTENTIAL GOTCHA:

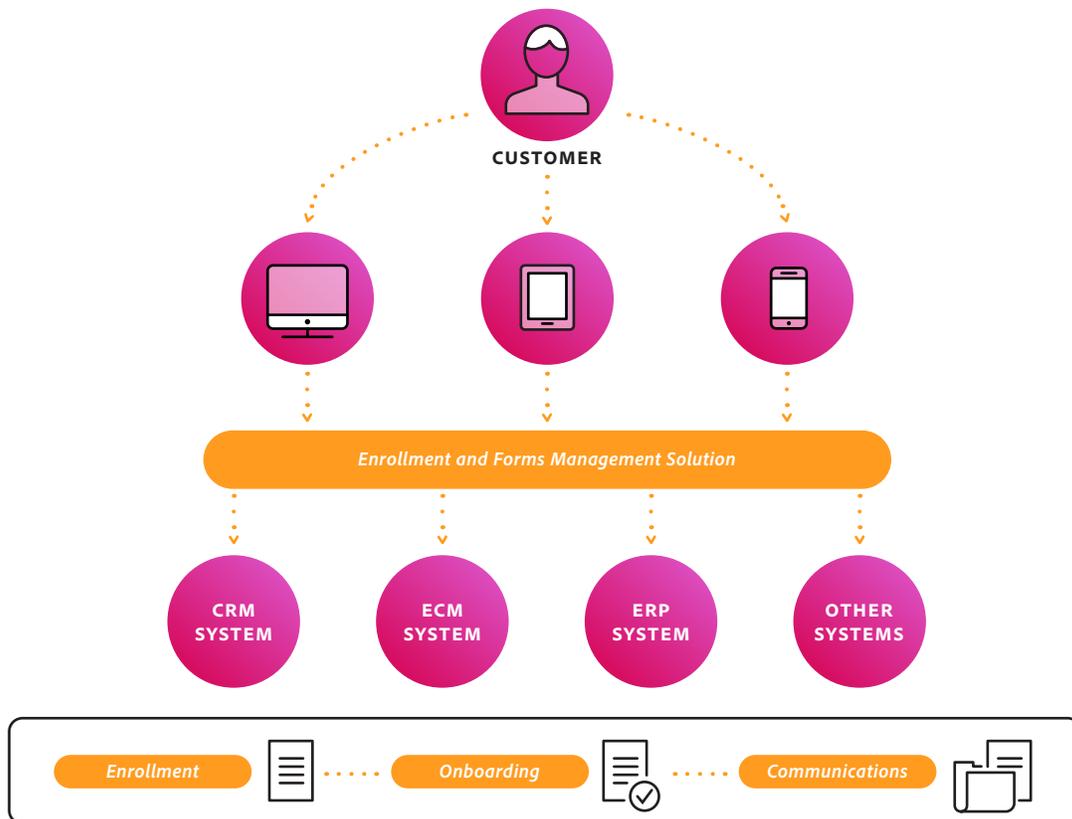
Certain forms management solutions come with a few out-of-the-box connectors but require unforeseen consulting fees to connect the systems you actually use.

4. 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. Unfortunately, the opposite is almost always true.

Although it's labor-intensive, building and managing a few basic forms or enrollment experiences might not be a challenge for a world-class development team. 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 developers 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 customers' evolving expectations.

Forms and enrollment processes must be connected to enterprise systems.



One of the main reasons DIY can't scale or keep up is that it's entirely reliant on manual development efforts to make changes. You don't have a centralized content management interface to quickly update the common content blocks you might have across hundreds of different forms. Instead, you have to manually code each of those content updates. Any integrations between fields on a form and a CRM or other business system have to be manually coded on each form as well. And if those fields ever need changes, each change also must be manually coded again. Keep in mind that any change to content results in code change requests 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 by testing form performance. This is critical for retargeting efforts and improving conversion rates. Forms visibility and governance problems are typical issues with DIY solutions too, with rogue forms getting created and distributed without any administrative knowledge or oversight. This can create significant compliance risks for any organization operating in a regulated industry. Even if compliance isn't a concern, those 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.

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?

POTENTIAL GOTCHA:

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.

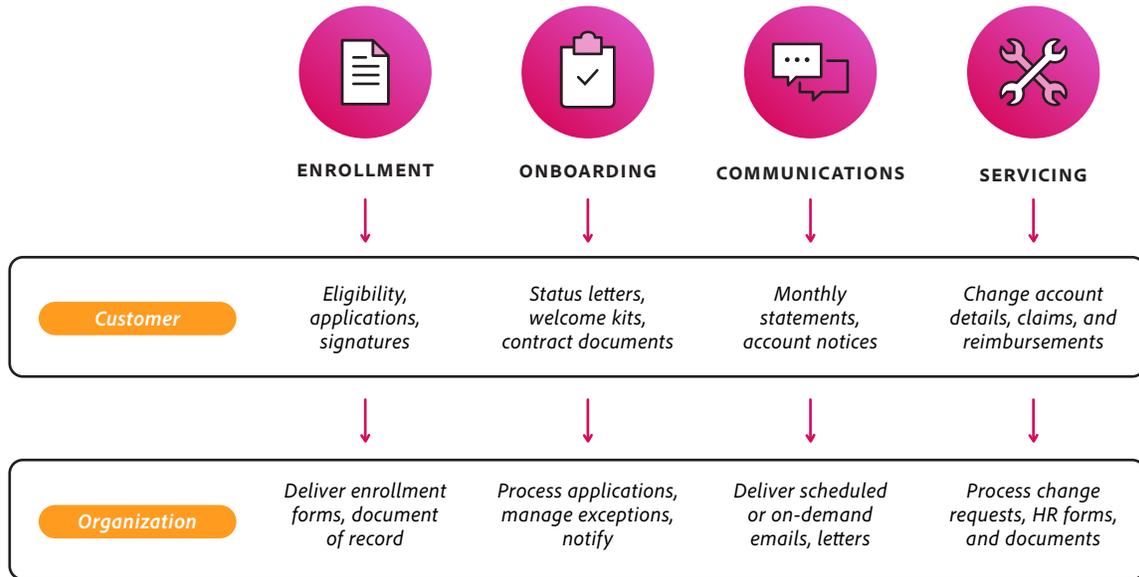
5. Complete end-to-end customer journey.

First impressions have a powerful impact on customer conversion and retention. The first few interactions and communications customers receive set the expectations for the brand, and the enrollment process can be a key touchpoint in building customer loyalty. In fact, post-conversion interactions that continue to deliver consistent, personalized experiences are critical to retention and customer lifetime value.

Many enrollment and forms management vendors are beginning to recognize the need to sustain loyalty-building experiences, and some have subsequently invested in solutions that help with customer 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 a suboptimal customer experience. That's why it's best to find a vendor that already has maturity in all these areas that can help you provide consistent experiences through all aspects of the post-conversion journey.

When evaluating enrollment and forms management solutions, it's also wise to be future-minded and consider all the other phases of the customer journey. There's tremendous value in a solution that can tightly integrate with your experience testing and optimization,

Enrollment and forms management should be an integral part of a customer's digital experience.



content management, campaign management, analytics, and other customer-focused marketing technologies. A holistic platform with a portfolio of integrated capabilities empowers you to integrate enrollment and forms management into the broader customer journey of engaging experiences.

Recognized enrollment and forms management solution leader.

As a Leader in the 2018 Gartner Magic Quadrant™ for Digital Experience Platforms, a Leader in Customer Communications Management on the Aspire Leaderboard, and a Leader in Workflow and Content Automation by Aragon Research, 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 enrollment and forms management solution that enables you to quickly create and deliver digital forms and documents that are responsive and customized for any channel and device. Its scalable drag-and-drop authoring lets you update, brand, and personalize all of your forms and documents with ease and speed. Plus, its native integrations with other Adobe Experience Cloud solutions lets you deliver the seamless, end-to-end experiences your customers demand.

Questions to ask:

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

To learn more about what Adobe Experience Manager Forms can do for your business, visit <https://www.adobe.com/marketing/experience-manager-forms.html>.