

FORRESTER®

Why HR Teams Are Advancing Digital Document Capabilities To Support Anywhere-Work

Executive Summary

Beyond the pandemic, remote work will transform into anywhere-work as workers transition back to the office yet continue to desire the flexibility of working from home and a mix of site types.¹ Organizations therefore need to be ready to support this new paradigm. For HR teams, this will be foundational to enhancing employee experience (EX), talent recruitment, and operations. Indeed, Forrester's research finds that companies oriented towards anywhere-work score higher on the four key indicators of company fitness: talent retention, EX, technology innovation, and cultural readiness.²

Leading HR professionals, however, recognize that they must assess their readiness in enabling an anywhere-work strategy.³ Noting that while good technology investments improve EX, bad investments inhibit it.⁴ For example, being unable to find a document, lacking the right security credentials to access a document, and/or manual or paper-based steps in otherwise entirely digital processes, all inhibit productivity and increase worker frustration. This is especially amplified for a remote worker.

As such, HR teams must revisit their organization's digital document capabilities, and assess how effectively they are able to meet new workforce demands enabled by an anywhere-work strategy.

Adobe commissioned Forrester Consulting to evaluate how digital document processes and tools support organizations' anywhere-work strategies.⁵ To explore this topic, Forrester conducted an online survey with 158 senior business and technology decision-makers from HR departments in North America and Western Europe with responsibilities for digital document processing at their organization.



Key Findings

HR professionals are underserved by digital document processes and tools. The HR professionals in our study reported a heavy presence of manual or paper-based steps across key HR processes (e.g., onboarding, training, and service management), slowing business and introducing several process and system issues.

Organizations are planning to expand and upgrade their implementation of digital document processes and tools. Since the pandemic, barriers to digital document process adoption have dropped and organizations are increasing their investment in this space. Sixty-seven percent of HR professionals reported plans to implement, expand, or upgrade implementation of digital document processes and tools in their organization over the next 12 months.

HR departments that lead in digital document process adoption report advantages in recruitment, retention, and operations.


HR professionals whose departments are using mostly digital document processes identified stronger recruitment experiences, improved EX, and streamlined operations in comparison to those whose departments were using minimal or a mix of digital document processes.⁶

Advanced digital document capabilities are key to supporting organizations' anywhere-work strategies. Anywhere-work will introduce new systems, processes, and challenges for workers. Leading HR professionals are thus investing in advanced digital document capabilities to empower decision-making, secure workflows, and build digital journeys in service of this new paradigm.

New Workforce Demands Have Put Pressure On Traditional Digital Document Capabilities

As HR professionals develop their anywhere-work strategy, they must be cognizant of how worker needs have changed and evolved. Adapting how technology supports communication and collaboration, all while maintaining security will be critical. The advancement of digital document capabilities will also be crucial as our study found that:

- **HR professionals are underequipped in terms of their digital document capabilities.** Across key HR processes, HR decision-makers continue to experience a preponderance of manual or paper-based steps (see Figure 1). This has slowed business and resulted in process and system issues, including: delays due to paper-oriented tasks (66%), delays in routing and obtaining signatures in the correct order (65%), and reworks due to errors from manually transferring data (59%).
- **The pandemic has reduced barriers to digital document process adoption.** HR decision-makers reported perceived regulatory and compliance risks (54%), and a lack of regulatory support for electronic approvals (47%) as leading barriers to adoption before the pandemic. These perceived barriers for digital document process adoption over the next 12 months have dropped significantly since the advent of the pandemic, with a 15% decrease in HR professionals reporting perceived regulatory and compliance risks, and a 26% decrease in those indicating a lack of regulatory support for electronic approvals as challenges.



“Digitizing document processes will help our team reduce the incidence of human errors and the amount of time spent on unnecessary tasks.”

**Senior HR manager,
healthcare and/or life
sciences company, Germany**

- **Digital document processes and tools continue to be a priority over the next 12 months.** Sixty-seven percent of HR professionals indicated that their organization was planning to implement, expand, or upgrade their implementation of digital document processes and tools over the next 12 months. Organizations and their HR teams have recognized the importance of these tools, with HR decision-makers anticipating the deployment will help improve EX (75%), enhance collaboration within a hybrid working environment (71%), and accelerate document processing (61%) moving forward.

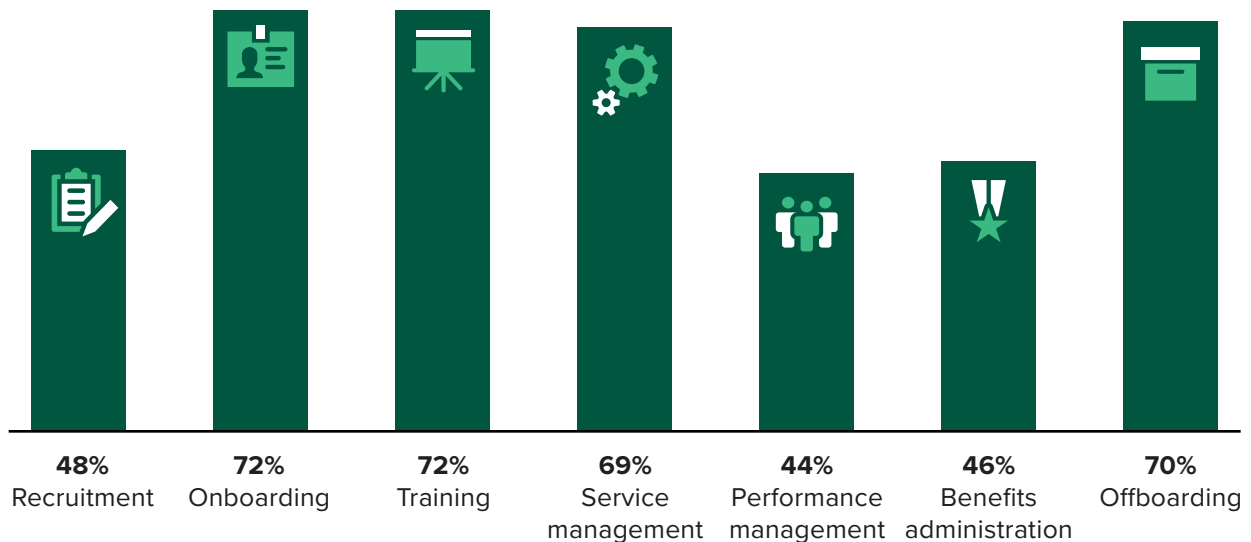


of HR decision-makers expect digital document processes and tools to help improve EX in their organization.

Figure 1

“To the best of your knowledge, how paper-based or digital are each of the following HR processes at your organization today?”

(Showing “Fully paper-based or manual” and “Mix of paper and digital” responses)



Base: 158 HR senior business and technology decision-makers based in North America or Western Europe with responsibilities for digital document processing at their organization

Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, September 2021.

Digital Document Processes Elevate Recruitment, Retention, And Operations

Implementing digital document processes has helped leading HR professionals reap significant improvements in recruitment, retention, and operations. Our study found that:

- **Digital document processes support recruitment.** Each step of the recruitment process matters, and whether or not it can be completed via entirely digital processes or through manual or paper-based steps will set the tone for the candidate's experience. As the war for talent intensifies, candidates have more places of employment to choose from, and HR professionals need to cement a strong first impression.⁷

Our study found that HR professionals whose departments had adopted mostly digital document processes reported a 59% reduction in the number of candidates who declined a role due to a poor recruitment experience, compared to those whose departments had adopted minimal or a mix of digital document processes. At an aggregate, more than half (57%) of HR professionals indicated that moving forward, digital document processes and tools would be very important in enabling them to attract and recruit top talent.

- **Leading HR professionals recognize the role of digital document processes in improving employee experience and retaining talent.** Seventy-five percent of HR professionals expect that the deployment of digital document processes and tools will help improve employee experience, with a further 65% indicating that these tools would be very important in helping their organization retain top talent.



“Document data analytics and insights have enabled us to assure job effectiveness, retain employees, and more effectively meet the requirements of new hires.”

Senior HR manager, government agency, USA

Our study also found that HR professionals in organizations using mostly digital document processes reported a 48% reduction in the number of employees leaving their organization due to a poor employee experience, compared with those in organizations using minimal or a mix of digital document processes.

- **Leading HR professionals recognize the role of digital document processes in improving employee experience and retaining talent.** Seventy-five percent of HR professionals expect that the deployment of digital document processes and tools will help improve employee experience, with a further 65% indicating that these tools would be very important in helping their organization retain top talent.

Our study also found that HR professionals in organizations using mostly digital document processes reported a 48% reduction in the number of employees leaving their organization due to a poor employee experience, compared with those in organizations using minimal or a mix of digital document processes.

- **Digital document processes streamline operations.** Eliminating manual or paper-based tasks and adopting digital document processes can help HR professionals save time and streamline operations. Our study found that HR professionals whose departments used mostly digital document processes spent an average of 2 hours per week on manual or repetitive tasks. In contrast, those whose departments used minimal or a mix of digital document processes spent an average 15 hours per week. This translates to time efficiencies of roughly 84%.

In addition, HR professionals at departments using mostly digital document processes also reported a substantial improvement in document workflows requiring signatures, with an 87% reduction in the number of documents returned with errors, and an 89% reduction in the



of HR professionals agree that digital document processes and tools would be very important in helping them attract and recruit top talent moving forward.

number of documents that were lost and had to be reissued (see Figure 2).

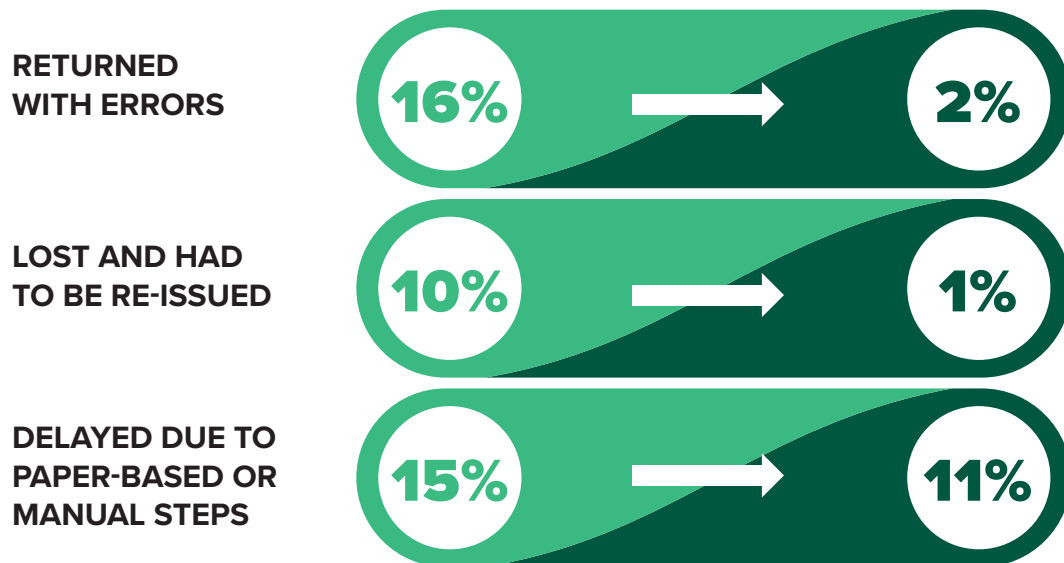
But the journey to digitizing document processes doesn't stop here. HR professionals whose departments used mostly digital document processes reported only a 29% reduction in delays due to manual or paper-based steps compared with those whose departments used minimal or a mix of digital document processes. As HR professionals develop their anywhere-work strategy, they must go beyond simply digitizing existing interactions, which include traditional choke points, to building end-to-end journeys that are designed with digital in mind. Advancing digital document capabilities will be crucial to this.

HR professionals at organizations using mostly digital document processes reported a 48% reduction in employee turnover due to poor EX, compared with those whose organizations are using minimal or a mix of digital document processes.

Figure 2

“Thinking of the last 100 documents you issued that needed to be signed, (sales, and/or employment contracts for instance), how many were:”

● Minimal or mix of digital document processes ● Mostly digital document processes



Base: 158 HR senior business and technology decision-makers based in North America or Western Europe with responsibilities for digital document processing at their organization

Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, September 2021.

Your Anywhere-Work Strategy Requires Advanced Digital Document Capabilities

Beyond traditional digital document capabilities (e.g., document sharing, document live collaboration, and e-signatures), leading HR professionals will invest in advanced digital document capabilities in service of their anywhere-work strategy to:

- **Empower decision-making.** Anywhere-work will introduce new systems, processes, and challenges for workers. Understanding how these changes will affect workers will be critical for HR professionals to understand. As such, more than half (55%) of HR professionals are planning to implement, expand, or upgrade their implementation of document data analytics and insights capabilities over the next 12 months, with 53% agreeing that this capability has provided or would provide powerful insights to improve their organization's EX.
- **Secure workflows.** As documents are accessed, shared, and collaborated on beyond the safety of an organization's traditional security perimeter — organizations expose themselves to significant security risks. Anywhere-work dramatically increases an organization's attack perimeter, requiring systems and processes (including documents) to evolve beyond the traditional perimeter-based model of security to embrace security by design. This will be an essential component of any organization's anywhere-work strategy. Leading HR professionals also recognize that systems and processes that are secure by design empower workers, with 60% agreeing that document security capabilities have empowered or would empower their employees to work more confidently and productively.



“We have already digitized document processes at our organization, but we are expecting to implement more advanced versions of our existing solutions to adapt to new changes over the coming year.”

HR director, media and/or leisure company, USA

- **Build digital journeys.** Leading HR professionals recognize that building digital journeys require more than simply digitizing existing interactions. Interactions must also become more connected. As such, HR professionals are planning over the next 12 months to implement, expand, or upgrade their implementation of document process integrations with customer-facing systems (e.g., digital self-service, digital experience platforms, etc.) (66%), with everyday productivity applications (e.g., word processing applications, file sharing and collaboration software, etc.) (59%), and for document automation capabilities (51%).

These capabilities will empower HR professionals to streamline operations and elevate experiences with: 1) 66% of decision-makers agreeing that integrating document processes with everyday productivity applications and 2) 65% agreeing that document automation capabilities have reduced or would reduce the number of errors or redundant actions on internal documentation. A further 66% agree that integrating document processes with customer-facing systems has enabled or would enable them to improve recruitment experiences.

Key Recommendations

Forrester's in-depth survey of 158 senior business and technology decision-makers from HR departments in North America and Western Europe yielded several important recommendations:

Shift away from remote work as a reactive tactic to the proactive anywhere-work strategy.

Forrester's research finds that HR teams play a key role in helping their organizations navigate the new hybrid model of working, but that they also find it difficult to make this model strategic rather than reactionary. For that, your team must devise a strategy that encompasses who, where, and when your workers can work remotely, but most importantly, how you can do so.

Identify how technology will support your organization's anywhere-work strategy.

To implement an anywhere-work strategy, your team must consider how systems and processes will evolve. Understanding how this impacts worker productivity, engagement, and satisfaction will be critical for your team in identifying how your organization's technology requirements will need to evolve. From there, your team must partner with your organization's IT team and get involved in EX technology design. This ensures that workers are properly equipped with the technology needed to be successful wherever they are working from.

Communicate how advancing digital document capabilities supports your IT teams' priorities.

While helping to deliver on the promise of anywhere-work, advancing digital document capabilities will also be in service of building an adaptive technology suite — a key IT team priority. Goal alignment here will thus foster stronger collaboration and enable your team to work more closely and effectively with your organization's IT team to deliver stronger outcomes.

Invest in advanced digital document capabilities to deliver on anywhere-work.

Traditional digital document capabilities like document sharing, document live collaboration, and e-signatures are basic requirements in today's digital environment. To get ahead of the curve, your team must take their digital document capabilities to the next level. Unlock document data to empower decision-making, secure documents to empower your workers, and automate and integrate document processes to streamline and build digital journeys.

Find a partner that can help you develop digital journeys, not just digital interactions.

A digital document partner, and not just a provider, can challenge your team to rethink how it invests in digital capabilities. For example: What are the biggest document stop gaps for workers? How should your team leverage document data analytics and insights? And which systems should your team prioritize integrating document processes and data with first? A digital document partner can help your team answer these questions and guide your anywhere-work investment strategy to focus on the most important capabilities in service of building digital journeys.

Appendix A: Methodology

In this study, Forrester conducted an online survey of 158 senior business and technology decision-makers from HR departments in North America and Western Europe with responsibilities for digital document processing at their organization. The study began in August 2021 and was completed in September 2021.

Project Director: Leon Zhang,
Market Impact Consultant

Contributing Research: Forrester's
CIO research group

Appendix B: Demographics

INDUSTRIES

Healthcare and/or life sciences	23%
Financial services and/or insurance	17%
Government	29%
Other	30%

COMPANY SIZE

1,000 to 4,999 employees	43%
5,000 to 19,999 employees	38%
20,000 or more employees	19%

GEOGRAPHIES

France	13%
Germany	13%
United Kingdom	15%
United States	60%

RESPONDENT FUNCTION

Recruitment and staffing	12%
General human resource management and strategy	34%
Learning, training, and development	15%
Compensation and benefits	20%
Labor and employee relations	20%

Appendix C: Endnotes

¹ Source: “Don’t Miss Your Anywhere-Work Opportunity,” Forrester Research, Inc., March 29, 2021.

² Source: “Use The Lessons Of 2020 To Create Your Anywhere-Work Strategy,” Forrester Research, Inc., November 17, 2020.

³ Source: Ibid.

⁴ Source: “Forrester’s EX Index: A Deeper Look At The Data,” Forrester Research, Inc., March 4, 2020.

⁵ For this study, we define digital document processes and tools as including 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.

⁶ For this study, we define HR professionals whose departments or organizations are using mostly digital document processes as those that selected either, “We exclusively use digital document processes” or “We mostly use digital document processes, but a number of our processes still require paper-based or manual steps.” This response was to a question that asked about their department’s or organization’s level of adoption of digital document processes. Additionally, for this study, we define HR professionals whose departments or organizations are using minimal or a mix of digital document processes as those that selected: “We have not adopted digital document processes and use paper-based or manual processes and tools for document management;” “We mainly use manual or paper-based processes and have implemented minimal digital document processes;” or “We use a mix of paper-based and digital processes and tools for document management.” This response was to the same question that asked about their department’s or organization’s level of adoption of digital document processes.

⁷ Source: Jack Kelly, “A War For Talent Is Starting —Spoiler Alert: Workers Will Win,” Forbes, April 17, 2021 (<https://www.forbes.com/sites/jackkelly/2021/04/17/a-war-for-talent-is-starting-spoiler-alert-workers-will-win/?sh=379c5bec49f2>).

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.

© Forrester Research, Inc. All rights reserved. Unauthorized reproduction is strictly prohibited. Information is based on the 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. [E-51898]