Digital Document Processes In 2020: A Spotlight On Western Europe

Western Europe Results From The August 2020 Thought Leadership Paper "How Digital Document Processes Are Shifting From Best Practice To Business Necessity"

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70% of respondents with European companies say that digitising document processes enables their organisation to better maintain business continuity amidst unforeseen circumstances.

Digital document processes will live with the company and endure to become part of CX and EX post-disruption.

Introduction

In just a few short months, the global COVID-19 pandemic has disrupted the way we work and live. Organisations in Western Europe are adjusting to that new normal by adopting collaboration and productivity technologies to continue operating in this virtual environment.[1] As they enter a recovery phase, a number of these technologies will stay and help them embrace a new future of work. Digitising document processes is proving to be one of them, with features such as file sharing, e-signatures, and cloud storage moving to the forefront.[2]

In this context, how are digital document processes strengthening organisations' business resilience? What role will they play in a post-pandemic world?

Adobe commissioned Forrester Consulting to answer these questions and evaluate how digital document processes are supporting business continuity. Forrester conducted an online survey with 450 senior IT and business decision makers based in Western Europe, North America, and APAC with responsibilities for digital document processing at their organisations.

We found that remote work in Europe is here to stay, and it requires organisations to implement an effective digital response. With a number of initiatives taking centre stage, digitising document processes is strengthening its position as a key enabler of both customer experience (CX) and employee experience (EX). Indeed, we found that companies conducting document processes online have less business at risk than their competitors. To future-proof themselves, organisations are accelerating their virtualisation of document processes and shifting these solutions from being "nice to have" to becoming business necessities.

KEY FINDINGS

› **The surge of remote working has emphasised the importance of digitising document processes to keep businesses moving.** As remote work grows, a lack of digital alternatives to serve customers poses an average of 34% at-risk revenue for European companies. This is hastening the implementation and expansion of digital document processes as an IT priority to maintain business continuity.

› **Digitising document processes opens up opportunities by improving CX and EX.** Respondents report that one of the top benefits from having digital document processes in place is to increase customer satisfaction. Sixty-six percent of them also say that these solutions are improving employees' collaboration while working remotely.

› **The expansion of digital document processes will continue to grow in a pandemic recovery phase.** Respondents from European firms anticipate that 38% of their organisation's workforce will continue to work remotely post-pandemic. As a result, and despite the recession, investment into digitising document processes will increase on average by 57% over the same period of time, demonstrating the importance of these capabilities for the foreseeable future.

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A Shift Of Perception About Digital Document Processes Is Taking Place In Europe

The sudden shift to a virtual working environment has compelled decision makers to reassess their organisation's IT priorities. Sixty-six percent of respondents say their organisation is shifting its priorities away from broader digital transformation initiatives to more tangible or concrete projects to support business continuity. This has brought to light the importance of digital document processes for their ability to service customers over time and in enabling employee collaboration. In surveying 125 companies in France, Germany, and the United Kingdom, we found that:

› **Remote working is here to stay at scale.** Respondents say they anticipate 38% of their company's workforce to continue working remotely on a regular basis post-pandemic.[3] That's up from 21% pre-pandemic (see Figure 1). In response, 66% of respondents say their organisation has provided its employees with supplemental technologies that support remote working (e.g., Wi-Fi or workstation subsidiaries, hardware, etc.). This goes up to 76% in the United Kingdom.

› **Digitising document processes are shifting from being an operational need to becoming a strategic necessity for European organisations.** Although decision maker previously perceived digital document processes as tactical initiatives, they now see how these processes improve CX and EX and the long-term business benefits they bring. Indeed, what decision makers used to perceive as the main benefit from these solutions — reducing printing and storage costs — is now becoming a secondary benefit. Instead, one in two respondents (46%) reports that the new top benefit is increasing customer satisfaction (vs. 27% pre-pandemic), and that e-signature functionalities help maintain business continuity (59%).

More than one out of three knowledge workers will continue working remotely on a regular basis post-pandemic.

"Digital document technologies are critical in maximising efficiency, adaptability, and the customer experience, all while reducing costs — particularly while working remotely."

IT director, hospitality, UK

Figure 1

"To the best of your knowledge, and in light of the COVID-19 pandemic, what proportion of your workforce is working remotely (e.g., home worker, teams split geographically, etc.) on a regular basis (e.g., at least once a week)?"

|	AVERAGE % OF WORKFORCE WORKING REMOTELY BEFORE COVID-19	AVERAGE % OF WORKFORCE EXPECTED TO WORK REMOTELY DURING PANDEMIC RECOVERY PHASE	Δ DELTA
France	16%	36%	+20%
Germany	21%	39%	+18%
United Kingdom	25%	39%	+14%

Base: 125 senior IT and business decision makers based in Western Europe with responsibilities for digital document processing at their organisation
Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, June 2020

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- **Organizations have opportunities to further virtualize their paper-based processes.** Only 14% of respondents say their organization exclusively uses digital document processes. Seventy-four percent say their business uses a mix of digital and physical document processes. As a result, less than half of knowledge workers in Europe (48%) have access to digital document processes tools to conduct their day-to-day work. The United Kingdom is the country where these solutions are the most in use (56%), followed by Germany (45%), and France (40%).

Digitising Document Processes Will Strengthen European Firms' Business Resilience And Unlock Business Opportunities

In the wake of the global pandemic, online interactions augment and, in many instances, they replace in-person interactions. While bringing new challenges, this imperative is making digitising document processes increasingly important for employees and customers. In response, European organisations are placing this at the top of their priorities with 70% of respondents reporting that it helps their organisation maintain business continuity amidst unforeseen circumstances.

- **While perceptions around digital document processes have changed, new challenges have arisen.** The global pandemic has brought new challenges in virtualising document processes including budget restrictions due to the economic downturn and the perception that training and change management efforts are more complex to conduct in a remote environment. However, it is critical for organisations to continue to deploy foundational technologies as this study uncovered dependencies between the level of adoption of digital document processes and a company's ability to maintain business continuity.
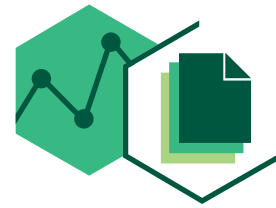
"Using digital document technologies helps in maintaining continuous operations within our organization, even with an entirely remote workforce."

CIO, financial service company, UK

› **Organisations with a higher adoption rate of digital document processes have greater business continuity success.** Companies conducting document processes online are more agile and flexible in continuing to serve their customers by providing them with digital alternatives. Specifically, respondents from these companies say they see five times more improvement in maintaining business continuity than those from companies with minimal digital document processes.[4] As a result, these companies have successfully managed to adapt and thrive, while those with minimal capabilities have found themselves at a serious disadvantage. Overall, respondents from European companies report on average 18% of at-risk customers due to a lack of digital alternatives to service them, and an alarming 34% of at-risk revenue (see Figure 2). In addition, one out of two respondents recognises that the lack of adequate technology and tools is impacting employees' productivity in this virtual workforce environment.

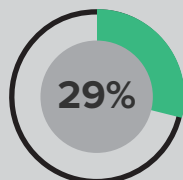"Digitising document processes plays a role in creating a sense of belongingness amongst our teams."
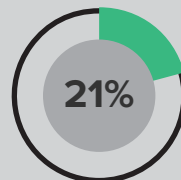
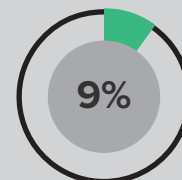*Sales director, financial service company, UK*

Figure 2

"In light of the COVID-19 pandemic, and to the best of your knowledge, please indicate the percentage of **at-risk customers** due to a lack of digital alternatives to service them."
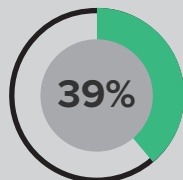
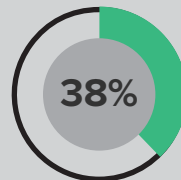| 29%	21%	9%
France	Germany	United Kingdom

"In light of the COVID-19 pandemic, and to the best of your knowledge, please indicate the percentage of **at-risk revenue** at your organisation due to a lack of digital alternatives."
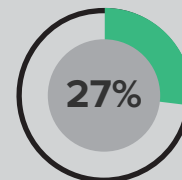
39%	38%	27%
France	Germany	United Kingdom

Base: 125 senior IT and business decision makers based in Western Europe with responsibilities for digital document processing at their organisation
Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, June 2020

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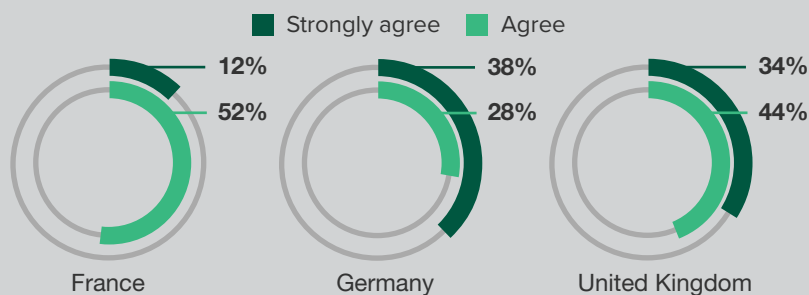> › **Digitising document processes is key to enabling customer service.** Conducting document processes online enables organisations to continue reaching customers they no longer see in person and those who prefer to conduct their day-to-day activities online. As such, organisations with the highest adoption rate of digital document processes are better equipped to keep their business moving. For instance, in North America, the region with the highest adoption rate of digital document processes, 69% of respondents indicate that digitising document processes allows their organisation to continue serving customers versus in Europe, where 50% of respondents say the same. That number is up to 64% in the United Kingdom.

> › **Digital document processes are foundational to improving EX.** Digitising document processes helps employees be productive and collaborative, two key pillars of good EX.[5] Indeed, on average 70% of European respondents say that these solutions allow employees to collaborate more effectively while working remotely (see Figure 3). Another 42% say it will continue to improve employee productivity and time savings in a post-pandemic world.

> › **Digitising document processes accelerates business and elevates digital maturity.** Manual or paper-based tasks slow processes, and therefore business. Respondents recognise this since one in two sees accelerating document processing as the top benefit from these solutions. In addition, 72% of respondents (and up to 78% in Germany) consider digitising document processes to be a very important or critical requirement in elevating their organisation's digital maturity, along with a mix of complementary initiatives and technologies such as migrating to the cloud (74%) and expanding automation capabilities (74%).

> › **Organisations are not considering digital document processes as a point solution anymore, but as an integral part of their IT landscape.** Integrating digital document processes with everyday productivity applications has become very important or a critical requirement for 65% of Western European respondents. Digitising workflows holistically with end users in mind is helping organisations reap all the benefits from their modernisation initiatives.

Figure 3

"Please indicate whether you agree or disagree with the below statement on how digital document processes could help to maintain business continuity."

Provide better employee collaboration while working remotely

■ Strongly agree ■ Agree

France: 12% / 52%
Germany: 38% / 28%
United Kingdom: 34% / 44%

France   Germany   United Kingdom

Base: 125 senior IT and business decision makers based in Western Europe 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 processes are enabling employee collaboration while working remotely.

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Digitising Document Processes Is Shifting From Best Practice To Business Necessity

The shift in perception towards digital document processes is driving an acceleration in user adoption, transforming these solutions from best practices to standard procedures. These solutions will endure to become part of CX/EX post-disruption.

› **Collaboration and data and analytics features are particularly in demand in Europe.** Companies are prioritising collaboration features such as document sharing (71%) and document editing, annotations, and format conversion (70%) to support business continuity and agility, and to empower employees to get their work done (see Figure 4). Being more advanced in their adoption of these capabilities than organisations in APAC for instance, respondents from Western Europe say their firms also extensively use document data and analytics features (70%) for data-based decision making.

Figure 4

"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?"

DOCUMENT SHARING

● Very Important   ● Critical requirement

France	Germany	United Kingdom
24% / 40%	52% / 32%	30% / 28%
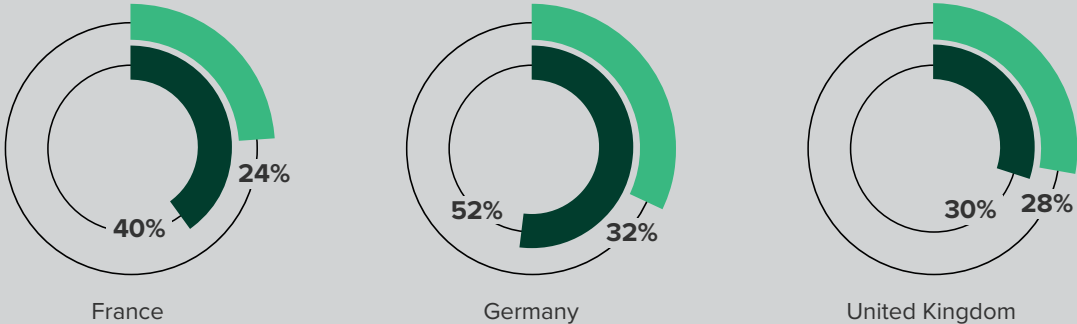
DOCUMENT EDITING, ANNOTATIONS, AND FORMAT CONVERSION

● Very Important   ● Critical requirement
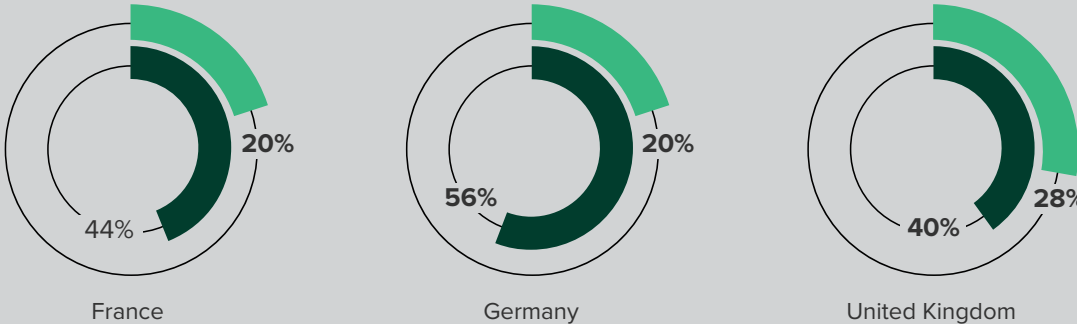
France	Germany	United Kingdom
20% / 44%	56% / 20%	40% / 28%

Base: 125 senior IT and business decision makers based in Western Europe with responsibilities for digital document processing at their organisation
Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, June 2020

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- **Organisations with minimal digital capabilities are heavily prioritising digital document processes over paper-based ones.** Among respondents from companies that do not consider conducting document processes online as a standard protocol, 72% say this attitude is now changing.

- **The urgency of developing digital capabilities to maintain business continuity is driving e-signature adoption.** Only 12% respondents say their organisation is concerned that a lack of regulatory support for e-signatures might be a barrier to digitising document processes. With no obstacles in mind, 60% say that the pandemic has caused an acceleration in user adoption of e-signatures. Using them instead of physical or "wet" signatures will last beyond the pandemic, with 60% of respondents reporting that it is shifting from being a best practice to a standard procedure.

- **The use of digital document processes is accelerating in Europe, driving an increase in spending despite the economic downturn.** Thirty-nine percent (39%) of respondents say their firm is planning to expand or upgrade its use of digital document processes capabilities in the next 12 months, while another 17% will implement it for the first time. So, despite the recession, spending on digitising document processes will increase on average by 57% (and up to 62% in France) over the same period of time, demonstrating the importance of these capabilities in enabling business continuity, as well as improving CX and EX.

Spending on digitizing document processes will increase on average by 57% over the next 12 months.
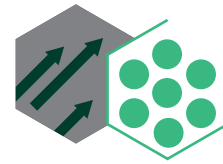
"We are seeing an acceleration in user adoption of digital document processes. The key factor driving it is the need to increase collaboration and keep projects moving."

HR director, advertising and marketing company, Germany

Key Recommendations

The global pandemic is showing decision makers the importance of cloud solutions such as digital document processes in their ability to serve customers virtually and to keep remote workers productive.

Forrester's in-depth survey of 150 senior IT and business decision makers based in Western Europe (France, Germany, and United Kingdom) about digital document processing yielded several important recommendations:

Recognise the importance of digital document processes as a milestone to digital maturity. Decision makers with organisations in Europe must recognise the value digital document processes provide in underpinning their business resilience efforts, but they must also consider them as a milestone to a full digital maturity. In this respect, digital document processes are foundational tools that are cost-effective and quick to implement, where more complex digitisation initiatives will take some time to provide benefits.

Use digital document processes to help manage a mixed model of work and customer service. Being able to manage a hybrid environment where virtual delivery and interactions are more critical than ever makes digitising document processes core to day-to-day operations. It increases an organisation's agility and flexibility, which can be key to ongoing business resilience. Business and technology leaders must future-proof their organisations by reassessing their business continuity planning and preparedness plans to include systems such as digital document processes designed for redundancy and dependability.

Remember that digital document processes are as valuable in the front office as they are 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 storage will bring immediate benefits.

Digital document processing solutions are a sound investment addressing both immediate and long-term needs. Given the current economic uncertainties, technology leaders must be aware of their company's situation, revenue outlook, and resources as they adjust budgets during the pandemic. So they must look at prioritising projects, processes and technologies that focus on business resilience or new ways of working. Digitising document processes addresses both elements making continued investment in these capabilities a sound choice in tough 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 in becoming more fluent with sharing documents, setting up virtual conferences, and working with collaborative environments.

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Appendix A: Methodology

In this study, Forrester conducted an online survey of 450 senior IT and business decision makers based in Europe, North America, 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/Data

GEOGRAPHICS

Australia	8%
Hong Kong	11%
India	11%
Indonesia	2%
Malaysia	2%
New Zealand	3%
Singapore	4%
Thailand	2%

APAC: 200 respondents (44%)

France	6%
Germany	11%
United Kingdom	11%

Western Europe: 125 respondents (28%)

Canada	6%
United states	22%

North America: 125 respondents (28%)

COMPANY SIZE

20,000 or more employees (global 2,000)	9%
5,000 to 19,999 employees (very large)	23%
1,000 to 4,999 employees (large)	40%
500 to 999 employees (medium to large)	17%
100 to 499 employees (small to medium)	8%
2 to 99 employees (small)	3%

INDUSTRIES

- 20% Financial services and/or insurance
- 11% Local or national government
- 20% Higher education
- 20% Life sciences
- 9% State government
- 20% Other

RESPONDENT DEPARTMENT

Finance/accounting	15%
Human resources/training	9%
IT	32%
Marketing/advertising	12%
Operations	15%
Sales	5%
Legal	6%
Product development and technology	6%

Base: 450 senior IT and business decision makers based in North America, Europe or 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

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Appendix C: Supplemental Material

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] For the purpose of this study Western Europe is defined as France, Germany, and United Kingdom.

[2] Digital document processes 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.

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

[4] Source: "How Digital Document Processes Are Shifting From Best Practices To Business Necessity," a commissioned study conducted by Forrester Consulting on behalf of Adobe, August 2020.

[5] Source: "Introducing Forrester's Employee Experience Index," Forrester Research, Inc., February 14, 2019.

To read the full results of this study, please refer to the Thought Leadership Paper commissioned by Adobe titled "How Digital Document Processes Are Shifting From Best Practice To Business Necessity."

Project Director:
Line Larrivaud,
Market Impact Consultant

Leon Zhang, Associate Market Impact Consultant

Contributing Research:
Forrester's CIO Professionals research group

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