



CIO CONFESSION: IT'S 2018, AND WE STILL USE WORD DOCS AS FORMS...

*How Innovative Companies Use
Automated Forms to Digitally
Transform Their Business Processes*



Digital transformation promised extraordinary technological innovation and advances in the way companies collect and analyze data. But it's 2018, and despite the fact that organizations outfit their teams with lightning-quick computers, high-powered internet and unprecedented training opportunities, many companies still collect critical business information from employees, customers and vendors with flat, digital Word documents, PDFs and spreadsheets that keep data trapped in an inbox long after it should have been captured and analyzed.

If your most important information is still buried in digital documents, PDFs and spreadsheets, you're not alone. McKinsey & Co. estimates that knowledge workers spend 28 hours writing emails, searching for information and collaborating internally each week,¹ and Vanson Bourne found that 57% of companies struggle with data silos, with 56% of those silos acting as a barrier to meeting business objectives.² And the unstructured-data silo is one of the biggest culprits, with data locked up in flat files and unavailable.





What brought us to this point? These digital practices started about 20 years ago, when companies labored to move their data collection from paper to digital. Thinking they were transforming their processes, individual stakeholders simply turned paper forms into Word docs and PDFs — and these flat and static digital documents have been stored on local drives and file shares and pushed from one email account to another ever since.

Now, however, a new solution is available that puts the promise of digital data collection within reach:

automated-forms software that doesn't simply re-create or digitally transfer static documents, but revitalizes and digitally transforms them into web-enabled, mobile-friendly, reportable, automated forms. Forms that put development into the hands of nontechnical employees and allow your organization to achieve true digital transformation without the restrictions of time, resources or budget.

Read on to learn about three important ways automated forms deliver on the promise of digital transformation.



AUTOMATED-FORM TECHNOLOGY TAKES FORMS LIKE THESE ...

PDF, Word, Excel and paper

- Time-consuming to create
- Distributed via email
- Data is static and unsecured
- Form data not searchable, not reportable
- Not mobile-friendly
- Inconsistent design and implementation
- Difficult change management

AND TURNS THEM INTO FORMS LIKE THESE ...

Automated forms

- Non-developer users can quickly create forms
- Distributed via workflow or portal
- Form data stored in secure database
- Data is searchable and reportable
- Mobile-friendly
- Consistent user experience
- Easy change management



AUTOMATED FORMS RECLAIM TIME

From emerging startups to Fortune 500 leaders, every organization strives to empower employees to use their time more efficiently. However, this focus on productivity rarely has any effect on how much time employees spend digging for information in email or compiling and recompiling data from flat, digital documents.

“Forms have been around forever, but they’ve been around in a very siloed world,” said Dave Marcus, senior vice president alliances at K2. “If I have five different

forms with five different data sets and I need to be able to utilize them for a sales process, I have to use multiple applications to access the data, leaving me prone to errors and time shortages. Automated forms create a single window into the organization that enables users to easily capture business data from multiple places and use it more effectively in their decision-making.”

Automated, online forms give employees quick access to data that would otherwise need to be emailed,

printed, stored and re-entered every time it's accessed. Critical data once buried in flat documents – data that could otherwise be used to inform strategic decision-making – can now be captured once and accessed and reported on throughout the organization.

“The amount of time even a small team can save with automated forms is incredible,” said Eric Eichler,

director of business process automation practice at 5th Method. “When you're just sending around emails and documents, there's no visibility, traceability or accountability for the changes being made. With automated forms, there's just one mobile, searchable, secure portal for all of your forms and data, and the amount of time it takes to get your forms into the system with a workflow around them is drastically reduced.”



AUTOMATED FORMS MAXIMIZE YOUR RESOURCES

One of the biggest challenges in transforming static, or even paper, forms to fully web-enabled, automated forms is that transforming even the simplest forms often requires some form of traditional development skills or formal training on a specific software platform. In fact, 23% of organizations surveyed cite lack of knowledge from departments outside of IT as a challenge that keeps them from uniting and integrating company data, and 21% say they do not know what data other departments hold or have access to.³ Since the average unspecialized employee doesn't have strong technical skills or time to learn them, they need a solution that uses the resources and time they have to capture and share the information they need.

"Self-service applications enable a broader range of people to manage and control the governance of important data and give the people who created these forms in the first place the ability to transform the business," Marcus said. "And when you take away the need for people to have a traditional development skill set to make automated forms, rapid change and adoption happen."

By making data collection more efficient, automated forms let employees reallocate their time and resources to focus on higher-level activities. This pays off in both the short term, when forms can be created and distributed quickly and easily, and in the long term, when it comes to future form development.

A hand is holding a tablet that displays a digital application form titled 'APPLICATION FORM'. The form is divided into three main sections: '1. Personal information', '2. Application', and '3. Sign & Submit'. Under '1. Personal information', there are fields for First name, Middle name, Last name, Home address, City, State, ZIP code, Country, Phone number, E-mail address, Date of birth (DD MM YYYY), and Gender (F/M). Under '2. Application', there are fields for Employment status (Employed, Not employed, Self-employed) and Citizenship country. There is also a field for 'Additional comments'.

“In one example, a global software company was onboarding new customers via email with 200+ Word docs,” Eichler explained. “Now, that’s not a great customer experience, because it makes it very difficult to determine where any particular customer was in the onboarding process. It was impossible to determine the answer to questions like, ‘Who has the document package now?’, ‘What are they working on?’ and ‘What’s left to be done?’ ”

“But the biggest challenge of all came when we tried to manage changes within any of the documents,” Eichler continued. “Managing multiple versions of the documents and trying to determine which customer had which version, or was supposed to have which version, became unmanageable. With Velocity, we were ultimately able to convert all 200+ forms and address all of these issues in months instead of the yearlong project it would have been.”

Automated forms replaced the terribly inefficient, static Word, Excel and PDF documents we used to email around the organization to capture data. Now more expensive development resources are freed up to focus on strategic IT initiatives, while at the same time giving the business the tools they need to create the applications they’re asking for.

— Pete Ramsdale, CIO of Enstar.

AUTOMATED FORMS MAKE THE MOST OF YOUR BUDGET

For a small subset of business processes, simple Word docs and survey tools like SurveyMonkey and Google Forms can meet the organization's data-collection needs on a budget, especially for one-off surveys and data collection. But because these methods lack capability and scalability, they simply can't tackle complex, high-volume or mission-critical forms-based processes.

Until now, it's been too expensive to automate the dozens or even hundreds of data-collection forms in an organization. Company budgets are typically focused on automating the more complex, mission-critical business processes, leaving organizations without the budget to digitally transform all the forms and processes they need to do business. But with new technological developments, transforming these forms becomes a cost-effective, functionally capable, enterprise-class scalable solution. With a much smaller budget, your business can automate and transform its forms at a fraction of the time and resources it would





have required even a year ago because the same people who created those flat forms can create the automated forms.

The synergies and savings don't stop there. Consider that over the long term, the cumbersome and lengthy processes associated with creating, filling out and passing around flat forms can be reinvested in initiatives that directly benefit the customer experience and other profit-focused actions.

For example, automated forms can be especially helpful when it comes to implementing the most efficient customer onboarding process: "Every extra day it takes to onboard customers is money lost," Eichler said. "So, when customers and employees get disoriented in email – 'Could you send me the most recent version of the document?', 'When did you submit the information?' – it's raising costs for you. Automated forms minimize confusion so that customers can quickly receive, submit and track the form in one portal. You simply don't know how much money you can save until you identify these kinds of bottlenecks."

SOLUTION SPOTLIGHT: VELOCITY FORMS FOR K2

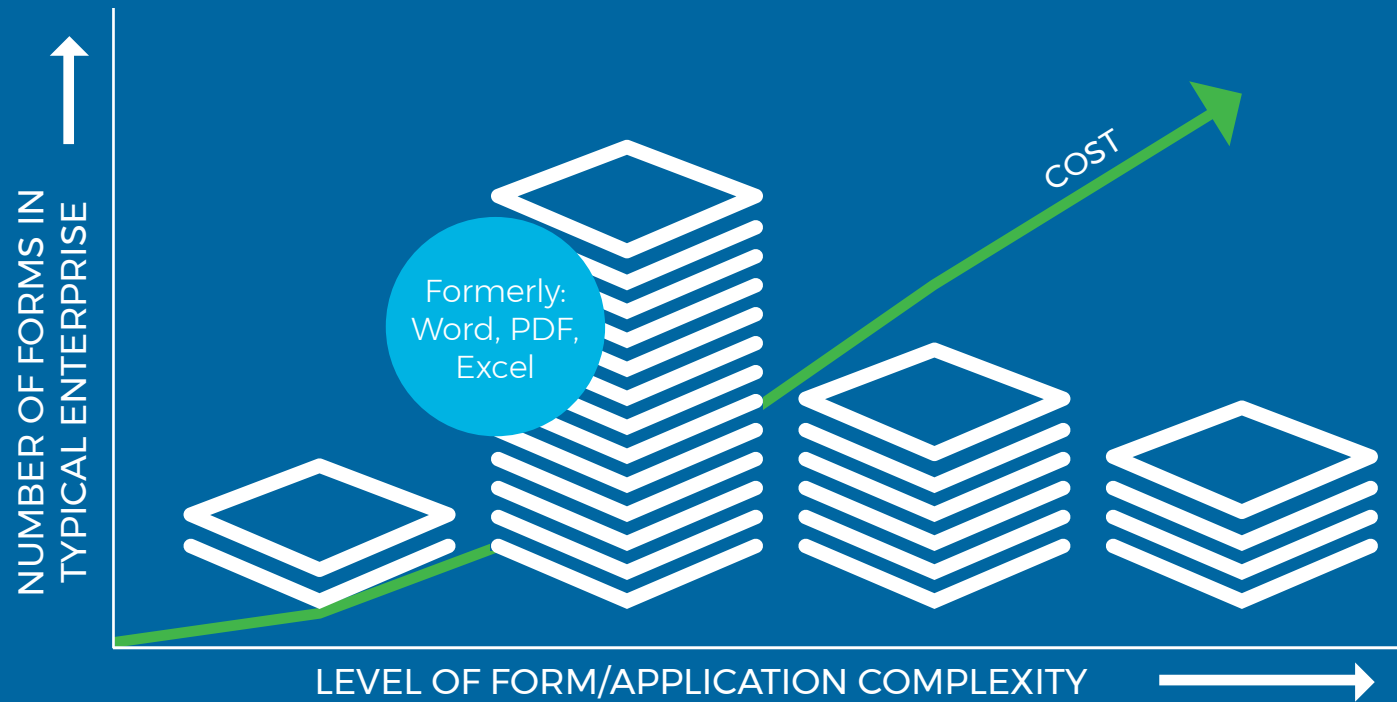
Velocity Forms is a wizard-driven, no-code, rapid forms-development and automation solution that allows business users to create online, mobile-friendly automated forms 10 times faster than traditional form development. Built 100% on top of K2 and K2 SmartForms and requiring no formal software-development skills, Velocity Forms enables a wide variety of non-developer users to quickly and securely digitize and automate enterprise and department-level data-collection forms to organize, analyze and report on mission-critical business data.

“Many forms don’t get consideration for automation simply because of the time it would take to accomplish the task,” said Eric Eichler, business process automation practice director at 5th Method.

“By reducing the time it takes to create a simple, data-collection form by a factor of 10x, we are now able to actually consider automating all of those forms in a reasonable and budgetable amount of time.”

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— Eric Eichler, business process automation practice director at 5th Method

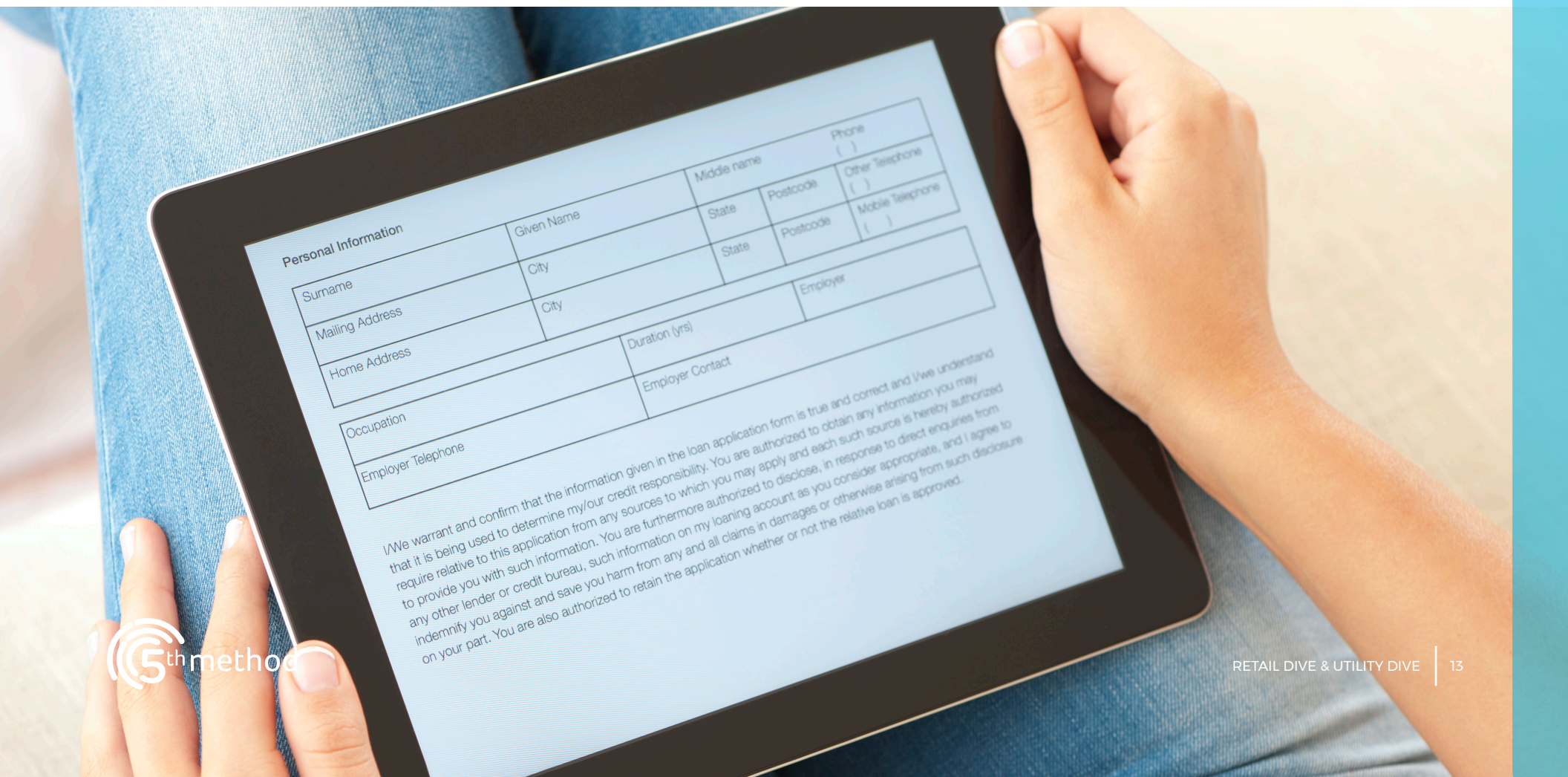


Usage	Simple surveys and forms	Typical enterprise data collection forms	Traditional business process apps	Custom-built applications
Tool(s) required	SurveyMonkey, Google Forms, MSFT Forms, etc.	Velocity Forms for K2	BPM/Workflow Platform	Custom code, .NET
Skills needed	Web user	Web User	BPM/Workflow developer	.NET development

UNLOCK TRUE DIGITAL TRANSFORMATION WITH AUTOMATED FORMS

If your company is still using flat documents and email to manage important business processes like customer or vendor onboarding, you're not alone. But now that a better solution is available, don't settle for digital trans-

fer when digital transformation could help you make better use of your time, resources and budget. Tap into the benefits of true digital transformation with an enterprise-scale forms-automation solution.





ABOUT

5th Method is a business process automation-focused software and consulting firm founded in 2009. Leveraging automated forms and workflows, system integrations, artificial intelligence, and mobile-driven user experiences, 5th Method is transforming the way their clients do business.

Velocity Forms

Velocity Forms is a rapid forms-development and automation solution that allows citizen developers to digitize and automate enterprise and department-level data-collection forms quickly and easily, and without developer skills. [Learn more about Velocity Forms here.](#)

SOURCES

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- 2** “Enterprises are wasting \$140bn with data trapped in legacy systems,” Data Economy, <https://data-economy.com/enterprises-wasting-140bn-data-trapped-legacy-systems/>
- 3** “Enterprises are wasting \$140bn with data trapped in legacy systems,” Data Economy, <https://data-economy.com/enterprises-wasting-140bn-data-trapped-legacy-systems/>