

Adobe Experience Manager Forms

Transform your customer experience by delivering a seamless, personalized digital enrollment and multichannel communications journey.

Studies show that customers will leave a brand after just one poor interaction, revealing how it is more important than ever to deliver a compelling, relevant customer experience.¹ Modern customers expect seamless, personalized digital experiences at any time, on any device—and they are demanding the same from the financial services industry, government agencies, and other regulated businesses.

Creating streamlined and personalized digital enrollment, onboarding, and communications significantly accelerates revenue, cost efficiency, and client satisfaction. Offering mobile-friendly enrollment to all clients on all devices is now an imperative.² Printing, distribution, and storage of paper are reduced, while low-value manual tasks like data rekeying and document routing can also be streamlined. As the quality of digital experiences increases, so does the adoption of more efficient digital channels over costly alternatives such as in-person, mail, or call center-based communication. A Deloitte report found that the average in-person transaction costs almost 17 dollars, while a digital transaction for the same process costs merely 40 cents.³ With digital being over 40 times more cost-efficient than in-person processing, it's no surprise that organizations across regulated industries are prioritizing digital self-service as part of their transformation initiatives.

Key capabilities:

- › **Author**—Empower business users to quickly design, approve, and publish centrally managed forms and communications.
- › **Discover**—Help users quickly find relevant forms and documents through search, rules, filters, and even geolocation.
- › **Enroll**—Streamline enrollment with mobile-optimized adaptive forms to reduce abandonment.
- › **Process**—Digitize and automate onboarding processes through visually designed workflows.
- › **Communicate**—Design, generate, and deliver multichannel, personalized communications to increase engagement and retention.
- › **Secure**—Protect your valuable documents through customizable role and access policies and encryption, even outside your organization's firewall.
- › **Optimize**—Improve your enrollment and communication experiences with granular analytics and targeted content to personalize the experience for each individual customer.

1. Harris Poll on behalf of Lithium Technologies: "The Path to Happy Customers"

2. "2017 Digital Trends in Financial Services and Insurance," eConsultancy and Adobe, March 2017

3. Deloitte Access Economics, "Digital Government Transformation," commissioned by Adobe, 2015

Product overview

Adobe Experience Manager Forms helps organizations deliver secure, streamlined application enrollment across any device, process submissions efficiently with automated workflows, and enable personalized onboarding and communications. The result is a standout customer experience that increases engagement, conversion, and retention. Businesses and government agencies use Experience Manager Forms to:

- › Modernize forms through our AI and machine learning driven feature, automated forms conversion, and convert PDF or XDP files into mobile responsive adaptive forms
 - › Increase digital enrollment conversion by prefilling form fields from back-end systems, enabling seamless multidevice interactions and measuring abandonment rates at form field levels
 - › Lower the cost of processing applications with end-to-end digital workflows and electronic signatures
 - › Deliver multichannel interactive communications with batch and on-demand statements and welcome kits for web, print, and PDF channels.
- › Increase business agility and scale by empowering business users to author, publish, and manage centralized form and document collections through an intuitive, drag-and-drop user interface
 - › Increase field agent productivity with offline mobile data capture and back-end data integration
 - › Improve regulatory compliance by ensuring the secure transmission of personally identifiable information (PII) in forms, generating documents of record for audit trails, encrypting sensitive documents, and aligning with accessibility standards



We can now onboard a new customer in 1-2 days with AEM Forms compared with 3-4 days previously...we've gained over a million dollars in additional revenue because it's easier to use and we can do customer onboarding much faster.

"The Business Value of Adobe Experience Manager Forms,"
IDC, 2018



Key features of Experience Manager Forms

 AUTHOR	 DISCOVER	 ENROLL	 PROCESS	 COMMUNICATE	 SECURE	 OPTIMIZE
Centralized content repository	Forms portal	Mobile-optimized forms	Digital workflows	Multichannel interactive communications	PDF file encryption	Form and communication analytics via Adobe Analytics
Theme and template editor	Dynamic search	Prefilling and extraction	Processing workspace	Agent interface for business users to generate letters	Microsoft Office file encryption	A/B testing via Adobe Target
Reusable form fragments	Location detection	Rule-based adaptive forms	Applications dashboard task manager	Scheduled on-demand or batch communications	Flexible usage policies	Automated forms conversion, powered by Adobe Sensei
Visual drag-and-drop touch UI	Delivery to Experience Manager Sites	Save and resume	Mobile app for offline data capture	Templates and document fragments	User authentication integration	Personalized offers and content via Adobe Target
JSON schema support	Engagement via Adobe Campaign	Barcode scan and ID validation	Electronic signatures and advanced signature workflows via Adobe Sign	Data integration for personalization	Audit logs	
Multichannel preview		Verification through CAPTCHA	System-agnostic data integration framework	Email delivery via Adobe Campaign	Visual analysis via Adobe Analytics	
Tool testing and debugging		Form field validation	PKI-based digital signatures via Adobe Sign	Interactive, drill-down charts		
Localization services		Section 508 and WCAG accessibility		Generate and archive document of record communications		

Author

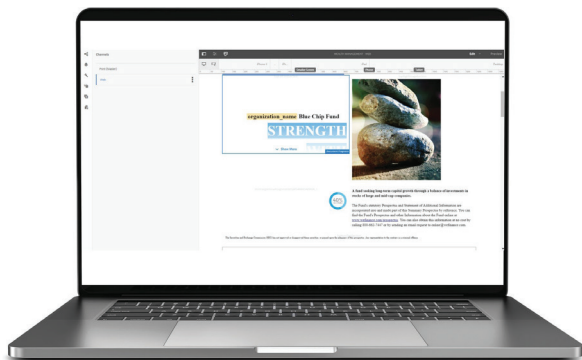
Reach more clients faster by empowering business users to author, publish, and manage responsive and consistent forms and communications across multiple channels without coding.

- › Use a central repository and business-friendly UI for creating, editing, and managing forms and communications.
- › Author a form once and render it across multiple screens, channels, and formats, even print.

- › Drag and drop the standard components you need, such as text fields, drop-down menus, buttons, charts, electronic signature capture, and more.
- › Leverage out-of-the-box style themes and form and document templates, or create your own.
- › Create reusable fragments, such as address block fields or standard paragraphs of text, and share and update across many forms or communications.

- › Add dynamic behavior or web services integrations to forms without coding using a visual rule editor.
- › Debug forms and workflows quickly with built-in development tools.
- › Preview how forms and communications will look on different devices and screens before publishing.
- › Send form and communication templates for content and branding review by stakeholders using customizable, automated workflows.
- › Localize forms and communications by taking advantage of workflows that connect to machine or human translation services.

Speed time to market with consistent, approved content by leveraging themes, templates, drag-and-drop content authoring, and more.

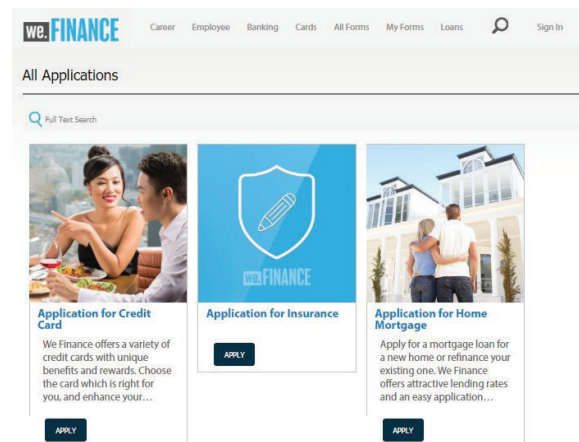


Discover

Help organizations connect clients with the form they need, streamlining the digital enrollment journey.

- › Drag and drop a forms portal into your existing websites or ones built with Experience Manager Sites.
- › Allow clients to search for forms in the portal using keywords, tags, or other properties such as date last modified.
- › Embed links to abandoned forms via an email campaign delivered using Adobe Campaign to retarget lost customers.

Facilitate form discovery for your customers to accelerate enrollment and decrease customer support costs.



A national bank increased conversion rates on some applications from 33% to 80%.

LEARN HOW

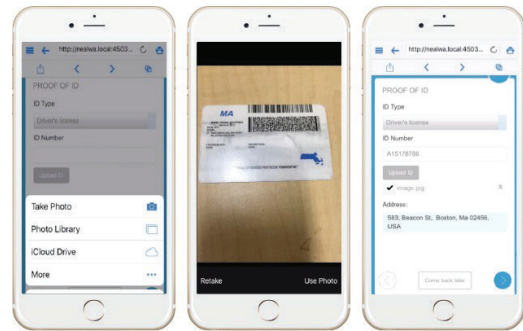
Enroll

Make it easy for customers to complete forms on any device quickly and error-free.

- › Organize forms into sections that update based on user input to simplify filling on all devices.
- › Get support for accessibility standards including Section 508 and WCAG.
- › Prefill form fields through easy integration with CRM systems and social logins, or use web services to populate fields based on user input.
- › Reduce keystrokes by taking advantage of device features, such as camera, barcode scanning, or speech-to-text.
- › Capture secure, legal, and compliant e-signatures using native integration with Adobe Sign.

- › Validate form fields such as phone and address and offer context-sensitive help to reduce the possibility of errors.
- › Allow clients to save in-progress forms and return later to complete them, even on another device.
- › Verify submissions with CAPTCHA support.

Simplify form filling by using device cameras to read barcodes and fill in information via web services.

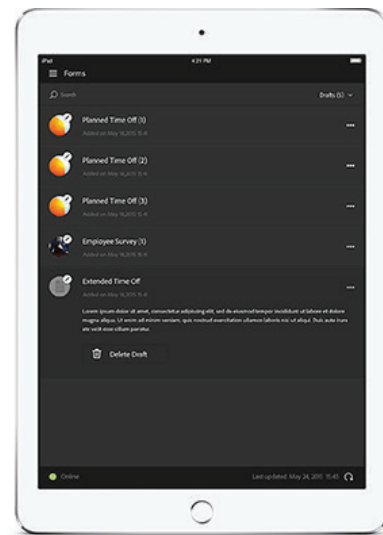


Process

Process submissions quickly by connecting form data with existing back office systems, business rules, workflows, and people.

- › Build digital workflows to process submitted form applications easily with a drag-and-drop interface.
- › Perform actions such as view assigned tasks, track progress, review, approve, reject, and more.
- › Use the customizable Experience Manager Forms app that allows mobile workers to securely collect and record data across multiple forms on tablets or smartphones, even when offline.

The Experience Manager Forms app allows field workers to securely capture information and submit data via forms while on the go—even offline.



- › Speed integration with your back-end and third-party applications with a data framework tool, create system-agnostic data models for forms and communications, or leverage out-of-the-box connectors to popular RDBMS and CRM systems.
- › Support complex e-signature requirements with Adobe Sign, including multiple signers, sequential and parallel signing workflows, anonymous user signing, and verifying signer identity.
- › Validate identity through trusted PKI-based digital signatures with Adobe Sign.
- › Leverage document generation workflows to automatically generate, deliver, and archive branded PDF documents of record.

Communicate

Improve client retention and satisfaction with personalized, interactive, and engaging communications and documents.

- › Create and approve communications letters quickly with a business user-friendly agent interface that allows agents to author letters using templates, preapproved content blocks, business rules, and more—for web, print, and PDF channels.
- › Generate engaging communications in responsive documents, including many styles of dynamic drill-down charts and personalized marketing offers, to drive effective upsell and cross-sell.
- › Connect back-end data sources to automatically personalize communications at scale.
- › Preview responsive documents for different devices before publishing.
- › Support on-demand or automated batch document delivery through multiple channels, including web portals, PDF, email, and paper.
- › Optionally validate content integrity and signer's identity with digital signatures for PDF documents.

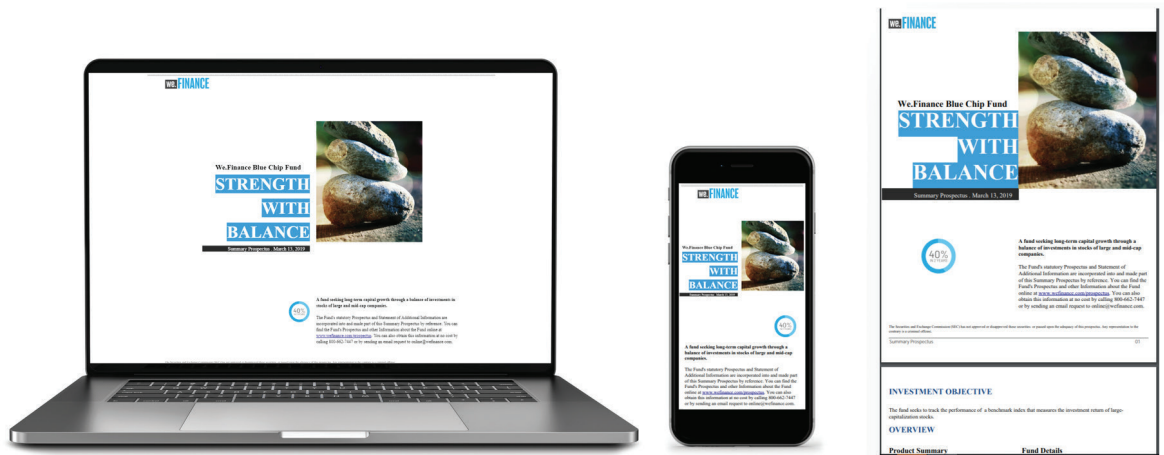
Secure

Protect sensitive information contained in PDF and Microsoft Office documents based on business policy, even outside your organization's firewall.⁴

- › Use strong encryption to protect information contained in documents.
- › Tailor document access and usage rights to the sensitivity of the information, and track its use.
- › Protect bulk or system-generated documents, such as statements.
- › Revoke usage rights at any time—even if the document has been distributed outside the organization.

- › Work in conjunction with strong user authentication systems, including single sign-on (SSO), Security Assertion Markup Language (SAML), and public key infrastructure (PKI).
- › Store protected documents through integration with Experience Manager Assets or ECM systems.
- › Visually track document usage and detect anomalies with the Data Workbench capability in Adobe Analytics.

Interactive communications personalize engagement and improve customer retention.

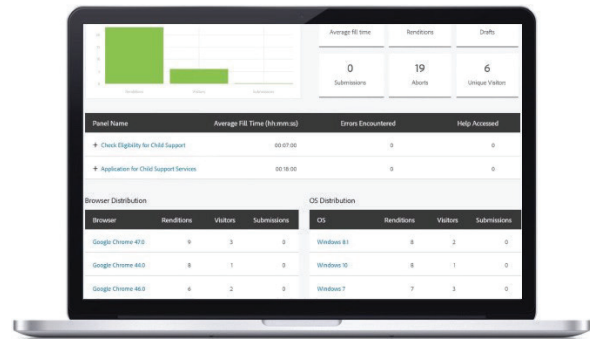


4. Requires purchase of Document Security add-on

Optimize

- › Work with other Adobe Experience Cloud solutions to continually improve customer experiences, maximizing conversion rates and satisfaction.
 - › Understand how users interact with forms and communications using out-of-the-box reports in Adobe Analytics.
 - › Drill down into report details to pinpoint form abandonment at the form field level, generating actionable insights to improve conversion.
 - › Use A/B testing in Adobe Target to test new forms or communication versions, monitor the test, and automatically publish better performing versions.
 - › Engage customers and increase cross-sell opportunities by inserting one-to-one personalized and dynamic content into responsive customer communications with Experience Targeting, powered by Adobe Target.
- › Accelerate going paperless with automated forms conversion, powered by machine learning and Adobe Sensei. Convert legacy PDF forms into responsive forms, extract reusable fragments, and continuously improve form collections.

Gain insight into form or document usage with Adobe Analytics reports.



A business development bank reduced processing times by over 50%.

LEARN HOW

Customers with Experience Manager Forms have realized significant ROI by streamlining multichannel authoring across their digital enrollment and customer communication processes.

THE BUSINESS VALUE OF EXPERIENCE MANAGER FORMS⁵

20%

lower form/document abandonment rate

379%

average three-year ROI

13 MONTHS

to break even

5. "The Business Value of Adobe Experience Manager Forms," IDC, 2018

Unified solution with powerful ecosystem for digital transformation

Experience Manager is part of Adobe Experience Cloud, which offers a set of common capabilities that equip marketers to share data, insights, context, and profiles across Experience Cloud solutions—accelerating time to value and powering integrated marketing magic. Key features include:

- › Native connections to Adobe Marketing Cloud (Adobe Target/Adobe Campaign) for delivering personalized experiences across any channel—web, mobile, email, social, and SMS

- › Native connection to Adobe Analytics Cloud for accessing rich first- and third-party user data with unified profile, advanced segmentation, and predictive analytics
- › Adobe I/O that offers APIs, libraries, and associated documentation to connect Experience Manager with almost any third-party application

Experience Manager also has a large ecosystem of implementation partners, developer user groups, and comprehensive digital learning resources to fast-track your digital transformation goals:



SERVICES

600+ certified implementation partners



COMMUNITY

Experience League that offers guided self-serve learning, community, and the ability to connect with experts



DIGITAL FOUNDATION BLUEPRINT

Developer-focused tools, training, and success-driven best practices to speed time to value



SKILLS

Adobe Digital Learning Services, training and certifications



GUIDANCE

Digital maturity assessment and prescriptive guidance for success offered by Adobe Consulting Services

About Experience Manager

Experience Manager allows marketers and developers to create, manage, and deliver customer-facing digital experiences across every channel—web, mobile, social, video, in-store, SPAs, and IoT. The solution spans digital experience management including web and mobile, digital asset management, forms, and communications. Experience Manager integrates

with other Adobe solutions, allowing businesses to use data insights to deliver targeted content to identified segments and transform content into engaging, personalized experiences—optimizing customer engagement and lead generation and accelerating revenue.

For more information

www.adobe.com/go/aem

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