



Transforming your forms

Goodbye
technical debt,
hello service agility

Public Sector Forms
White Paper

What are digital forms and why are they important?

For the purposes of this paper, 'forms' is a catch-all term for anything that enables your organisation to gather information about the citizens, service users and businesses that you serve (there is an important extension to this idea, but we'll get to that later). Depending on the type of service you provide, this could include:

- Registration, onboarding and enrolment
- Applications for benefits, grants, permissions, licences
- Making changes to personal or business details
- Reporting events, issues, faults
- Requesting a change to a service
- Booking an appointment
- ... and much more

This list covers almost any touchpoint or interface between your organisation and the outside world. Digitising them successfully can deliver huge benefits e.g. improvements in performance scores, cost savings, increased citizen and workforce satisfaction.

Why are forms such a challenge?

Forms sound as though they should be easy to implement; in fact, they are very hard to develop and maintain at scale to ensure that they are:

- **Usable** – so that people can complete tasks effectively, efficiently and easily
- **Accessible** – so that all types of people can use them, in compliance with disability legislation
- **Responsive** – working well and quickly on a wide variety of devices, operating systems and screen size
- **Secured** – offering security protection over time, in an evolving landscape of threats

The responsibility for maintaining forms often falls to IT departments, many of which rely on coding frameworks. However, with frameworks becoming out date increasingly quickly, the problem of developing and maintaining forms for IT departments is increasing, not decreasing. This means that most organisations now have significant form-related technical debt as a legacy of piecemeal approaches. They struggle to maintain the forms they already have, let alone improve them or increase the scope of their digitisation. The result is tension between business and IT teams as demands for service improvement and agility are constrained by workloads and competing priorities.

From an external perspective, this leads to citizens grappling with inconsistent and confusing experiences: some digital forms work well, but others have usability or functional issues; in some cases, processes have gaps in digitisation or are not digitised at all. This is borne out by our own analysis of forms in the financial sector which showed that, in many cases, there were serious usability and accessibility deficiencies – as well as security loopholes. These result in lost opportunities and an unwanted shift to more expensive communication channels, such as call centres or in-person appointments.

What can be done about this?

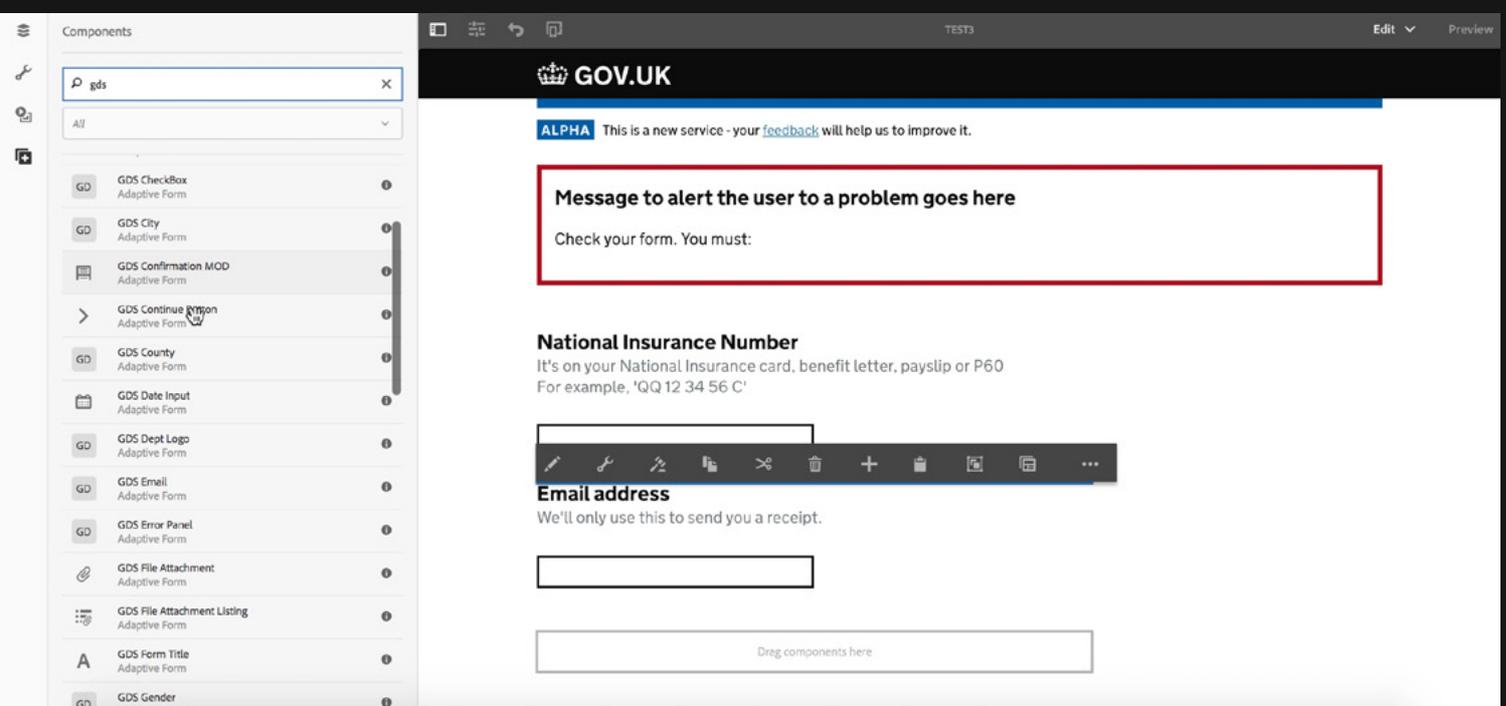
Thankfully, a new generation of enterprise form-building applications exists in the market to help overcome the challenges of delivering high-quality digital forms at scale. By outsourcing the repetitive heavy lifting of creating and maintaining high-quality form templates and components to an independent software vendor (ISV) with a fit-for-purpose forms product that is proven to be scalable and robust, you can:

- Mitigate security and compliance risks
- Free up precious IT resources
- Empower business teams to understand, manage and improve their own forms
- Ensure consistent brand experience and accessibility

Several key providers exist in the marketplace including Adobe, Avoka, OpenText and Think Smart. These products are rapidly developing capabilities that both compete – and integrate – with CRM systems such as Salesforce and Microsoft Dynamics, or service-focused products like Service Now (all of which have some form-building capability).

These leading products provide easy-to-use drag-and-drop management interfaces that enable business users to do tasks that previously required development resources, while also providing governance for changes through configurable approval workflows. They are cloud-native and -agnostic and connect easily into the broader technology ecosystem via standards-compliant APIs, pre-built analytics connectors, and so on.

For UK government departments and arms-length bodies, a key requirement is GDS UK compliance. You should make sure that the ISV and systems integrator you choose has a solution that allows forms to be deployed using the Government Digital Standards design system and coding standards, or their localised equivalents in the devolved administrations.



This screenshot shows Adobe Experience Manager Forms, with 'What You See Is What You Get' editing capability on a GDS-compliant form template and components.

What should an enterprise-grade digital forms platform provide?

To start with, the ideal platform must produce forms that deliver consistently on the four challenges listed above: Usable, Accessible, Responsive and Secured – but there are more potential benefits on offer from the top performers:

- **Standards-compliant** – GDS-compliant citizen experience, with the provider responsible for maintaining compliance via timely product releases.
- **Upgrade friendly** – the ability for forms to be upgraded to the latest product version, or to apply security patches, without the need to recode forms (avoiding technical debt and automatically improving the citizen experience over time).
- **Template- and component-based** – assemble forms from reusable interactive components (and groups of components) that are usable and accessible, with the ability to change once and update everywhere.
- **Form groups** – group forms into sets that can be kept in sync together, with changes to brand styles and other common elements being made once and rolled out to all forms in the set.
- **API-ready** – Powerful tools for data connection and integration using modern API standards, e.g. Restful, Soap and GraphQL.
- **Analytics-ready** – pre-built integration to various analytics packages to provide deep insight into customer / citizen behaviour and performance.
- **Automated** – for labour-intensive form-related tasks e.g. transferring from paper or PDF, choosing high-performing variants on the fly during an optimisation experiment.
- **SEO-friendly** – low-payload, high-performance on all devices with good visibility to search engines.
- **Personalisation & optimisation** – pre-fill and tailor the experience for the needs of cohorts and individuals, test hypotheses, understand results and rapidly improve the form experience.

- **Workflow logic** – both within and between forms to create variable branching workflows that can adapt based on end-user input and external data to streamline processes and improve experience.
- **Data display** – as noted in the introduction, forms are not only about gathering data; they should also be capable of displaying data back to the citizen, both through pre-filling and more generally, including using form components to create dashboards.
- **Multi-language support** – including character sets, right-to-left support and seamless access to translation services.
- **Digital signatures** – to create a secured object of record (e.g. a digitally-signed and -locked PDF) as a permanent record of a business process.
- **Governance & approvals** – configurable workflows for managing changes to your forms before they are published, enabling the right balance between speed of change and risk management.
- **No- or low-code** – making powerful features available to business users i.e. enabling non-developers to use management interfaces to make changes easily, which then flow through appropriate governance workflows for approval before being deployed.

With these capabilities, your new forms platform will scale gracefully and accommodate all your organisation's needs – both now and in the future. Your organisation will take a major step forward with a new, transformative operating model that empowers business users, who can take direct ownership to create and manage services in ways that previously required significant developer support.

The ability to develop and deploy services faster will translate to many direct benefits including improvements in performance scores, cost savings, reduced risk and increased citizen and workforce satisfaction. Crucially, this will also significantly reduce technical debt whilst freeing up valuable development resources for other mission-critical tasks.

How can I get started?

IBM has significant experience in delivering successful digital form implementations at scale for major organisations worldwide. We also have a strong global partnership with Adobe, the leading ISV in the enterprise-grade digital forms market, and our own 'Adobe Forms For UK Government' accelerator that provides pre-built GDS compliance and a number of other key additions to the market-leading Adobe Experience Manager Forms product. With Adobe-related and general services packages listed on GCloud, it is easy to procure our help at any stage of your form digitisation journey.

For example, we could begin with a simple health check of your current forms implementation (remembering that 'forms' covers more than the data capture screens themselves), then move onto a more comprehensive iterative programme of analysis and implementation, with the goal being a sustainable transition onto an enterprise-scale forms product, eliminating technical debt and increasing service agility.



Kit Lewis

Public Sector Lead for Adobe | UK & Ireland
kit.lewis@ibm.com



Kevin Anderson

Global Adobe Innovation Architect, IBM Consulting
K.Anderson@ibm.com

www.ibm.com/adobe-partnership



The information in this document is provided “as is” without any warranty, express or implied, including without any warranties of merchantability, fitness for a particular purpose and any warranty or condition of non-infringement. IBM products are warranted according to the terms and conditions of the agreements under which they are provided.

© Copyright IBM Corporation 2021. IBM, the IBM logo, and ibm.com are trademarks of International Business Machines Corp., registered in many jurisdictions worldwide. Other product and service names might be trademarks of IBM or other companies. A current list of IBM trademarks is available on the web at www.ibm.com/legal/copytrade.shtml.