

FORMHERO PRESENTS

STEPS FOR MAKING
PAPER [WORK]

FOR YOU AND YOUR
CUSTOMERS



FORMHERO

<https://formhero.io>

INTRODUCTION

EVERYONE HATES PAPERWORK

It's no secret that everyone hates paperwork, but that wasn't always the case. As hard as it is to believe, paperwork used to be at the **forefront of a great customer experience**. When you were applying for a loan or opening a new account, someone was there with you asking useful questions, finding the right forms, and even filling them out for you. This process helped build relationships and developed trust earning organizations new, long-term customers.

Somewhere along the way, the relationship side of paperwork was lost, leaving customers with the burden of finding and completing these complex documents on their own.

However, **paperwork isn't the problem**. Paper-based documentation is built to serve an organization's business processes and legal needs, and it typically does this very well. The problem is that organizations have turned internal documents into customer-facing ones; acting as a direct barrier to new customer acquisition targets and digitization goals.

Many organizations believe that in order to improve the client experience, they will be forced to change their internal processes and retrain existing staff.

But change doesn't have to be disruptive. In this guide, I'll share steps many forward-thinking organizations have already implemented to make paper work again - for both their customers and their processes.



“*Paperwork used to be at the forefront of a great customer experience.*”



**TREAT PAPERWORK
AS AN OUTPUT,
*NOT AN INPUT***

STEP 1: Treat Paperwork as an output, not an input.

Yes, your paperwork is important **to you**, but that doesn't mean it's something your customers need to see, or worse, interact with.

Just because you want to end up with a printed or digitally signed document, doesn't mean you should start there. If you stop thinking of paperwork as the means for acquiring customer information or initiating processes and instead think of them as receipts of interactions, it opens up entirely new avenues for data collection.

In today's digital and mobile world, you're now open to a wide array of possibilities ranging from smart forms to mobile apps.

Once you've collected enough information to power your process, you can simply **automate the completion of the paperwork** instead of having your customers do it for you. A prime example is online tax applications. Intelligent, intuitive wizards drive the customer-facing process, leaving the paper/digital record as an output once the interaction is complete.

WARNING:

Turning your existing paper forms into PDFs, or recreating them in HTML, is not the answer. In order to remove the frustration and complexity of your processes from your customer's experience, you need to rethink what and how you present information to each unique user.



ELIMINATE ANYTHING
NONESSENTIAL
FROM THE CUSTOMER
EXPERIENCE

STEP 2: Eliminate anything nonessential from the customer experience.

Typical paper-based forms include sections that are totally irrelevant to most customers or are only used for internal processes.

Nearly every modern marketer is familiar with the concept that each additional field added to a website's lead generation form will reduce conversion rates by up to 15%. Yet, that wisdom and experience hasn't found its way into most organizations' online or business process forms.

Most forms are not only dense with nonessential questions, but they are also filled with sections marked, "for internal use only" or contain sections pertinent only to certain customers. This creates complexity for your customers and reduces your overall conversion rates.

Conduct an audit of your forms, identify what is genuinely required for your processes, and then start eliminating anything that's not essential. Remember: **You're still going to generate your existing documentation** when the customer completes their information. You're only removing these fields from their experience - not getting rid of them forever.

“*Customers should only be presented with the options that are relevant to them.*

Truly unique customer journeys are possible when you combine multiple previous answers into branching opportunities.”



**BE
DYNAMIC**

STEP 3: Be dynamic.

The most common way to revamp paper processes is to transition to a digital solution. However, simply putting *something* online doesn't mean you've done a good job. Your solution must adapt to the needs and responses of your customers if you want to create a compelling experience.

Thinking again about online tax applications, or the personal bankers of the past, their key value is their ability to listen to the customer's needs and adjust their questions accordingly. You can adopt this model by building dynamic questions, or what marketers call "progressive polling", to guide your customers through a curated path of questions.

For example, if your customer answers they are transferring an account as a sole proprietor, why continue to present them with questions about their year of incorporation? If they answer they are single, why force them to see and skip over sections about their spouse?

Each time you dynamically adjust your questions based on previous answers, removing non-essential questions, you're **reducing the friction of your form** and increasing your chances of converting a new customer.

TIP

If a field is optional, that usually means your process can proceed without it. If that's the case, why even present it to your customers? Furthermore, questions that are only used for a limited set of customers should only be displayed when it's determined that they are relevant.



**AUTO-COMPLETE AND
VALIDATE DATA**
BEFORE IT'S SUBMITTED

STEP 4: Auto-complete and validate data before it's submitted.

One of the biggest issues with typical customer-facing documentation is the sheer number of errors that can occur on each form.

While most organizations strive to reduce their customer acquisition costs (CAC), many overlook the full costs of their existing processes. Complex internal forms, with little support for completing them, end up being submitted with invalid or incomplete information. Chasing down the missing information not only increases the CAC, but also increases the potential that you might lose the opportunity entirely.

It doesn't have to be this way. The first thing you can do is validate the information at the customer's end before allowing it to be submitted. But validation needs to be more than checking if a field has information. You need to validate the quality of the information in each field and across multiple items.

For example, checking to see that both an address and a zip/postal code were entered doesn't do much unless you can confirm that the postal information **matches** the supplied address.

Also, look for ways to pre-populate information. Use a customer's current location to suggest ideal branches, use auto-completion to fill cities and countries based on addresses or auto-complete employment addresses once an employer has been listed. By auto-completing your paperwork with the information you know is 100% accurate, you'll dramatically reduce the possibility, and associated costs, of submission errors.

SUGGESTION:

Look for questions that require multiple fields to complete. These are often ripe for auto-completion or pre-population. Addresses, employers, branch information and education sections are prime examples.



**USE NATURAL
LANGUAGE**
AND VISUAL CUES

STEP 5: Use natural language and visual cues.

Now that you're extending a much more customer-centric face to your processes, it's time to start thinking (and talking) in the language that humans actually use.

Most paper-based documents contain language that makes sense internally, like industry jargon, acronyms or legalese, but that doesn't mean it makes sense to your customers. If you want to know where your customer lives, just ask them. The more you can make your form resemble a trusted advisor who is helping guide them through the process, the higher your conversion rates will soar.

Also, look for ways to use visual cues instead of text based questions. It's significantly easier and faster to click on your province on a map than it is to type it into a text field or select it from a dropdown of multiple entries.

language

WHICH IS MORE NATURAL?

Where do you live? Do
you own a cottage?

vs

What is your primary and
secondary residence?

visuals

CLICKING IS FASTER THAN TYPING

Just because your
documents can't contain
images doesn't mean your
digital forms can't.



**YOUR CUSTOMERS ARE
MOBILE.**

YOU SHOULD BE TOO

STEP 6: Your customers are mobile. You should be too.

Once you accept the idea that your **paperwork is not an ideal vehicle for customer acquisition**, you need to start looking at capturing their information on the devices they are already using.

By embracing the idea that paperwork is simply the output and following the steps above to remove unnecessary questions, create dynamic customer journeys, and pre-populate & validate information as you go, you're ready to start building a solution that works the way your customers prefer to interact.

Mobile continues to be a dominant avenue for product evaluation and service consumption. Ignoring it means completely shutting down your fastest growing user base; something that can mean the downfall of some organizations or a prime environment for a new competitor to arrive and disrupt.

TIP

Have you ever tried viewing a PDF on your phone? How about navigating and completing a dense HTML form? Once again, simply providing a PDF or HTML recreation of your paperwork online isn't going to cut it. Look for tools and solutions that help you create mobile friendly experiences.

BONUS

If you're looking to improve things even more, here are a few extra tips.



Bundle multiple processes together

*Often, multiple processes have overlaps in terms of the required information from customers. By bundling processes into a single digital experience, you can **dramatically reduce the effort required to subscribe to or engage with multiple product offerings**. For example, when a customer is taking action to transfer an account, why not ask them if they'd also like to apply for a new credit product? If they say yes, you'll only need to add new fields to cover information that's not already covered during the account transfer process. When complete, use the information your customer has entered only once to generate the two unique forms that drive the separate internal process.*



Whitespace is your friend

Most forms were originally designed to reduce costs by limiting the amount of paper that needed to be printed, scanned and stored. The front-end of a digital process doesn't follow the same model. Give your customers, and their eyes, a chance to rest by keeping your forms clean and separating questions into distinct sections.



Eliminate the ink with eSignatures

If you're building a process that shields customers from the need to interact with physical paperwork, consider seeing that all the way through to the signature phase.

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FINAL WORDS

PAPERWORK ISN'T YOUR PROBLEM.

Beautiful, customizable forms bring your documentation to life and shields your customers from any complex workflows and documentation.

At FormHero, we work with teams like yours every day to recreate existing processes and the information they require in a way that maximizes conversion, reduces errors and allows your existing workflow to continue.

We'd love to hear from you if you're ready to start improving your customer experience without having to rework your back-office processes.



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