



# GREENFORMS

**IMP Solutions delivers business efficiency, data burden reduction, cost savings and reduction in the carbon footprint of every organization it touches**



# Table of Contents

GreenFORMS solutions enterprise-wide.....	2
IMP takes BPA thinking to a new level .....	3
The Vision Challenge .....	4
The eForms Vision Solution .....	5
Understanding the Value of Business Process Automation.....	9
Data Burden Reduction.....	10
Accessible Change .....	10
Carbon Reduction .....	10
The Forms Maturity Model.....	13



The key to providing best of breed solutions is having the right skills, supported by industry best practices. IMP Solutions Business Process Management Experts and Consultants are some of the most experienced in the industry and have years of best practice knowledge.

Our Professional Services organization is built on a framework of best practices that includes Agile methodologies for Application Development and ITIL Service Management best practices for improved IT Operations and Management.

This document focuses on the GreenFORMS methodology for Business Process Management, leveraging best practices for data collection and management delivered on Adobe technologies.

## GreenFORMS solutions enterprise-wide



*IMP Vision of Business Process Automation with GreenFORMS™ and Adobe LiveCycle: "Getting organizations ready for an enterprise-wide green IT transformation"*

IMP Solutions delivers successful definition and implementation of projects in four business areas – electronic forms, correspondence management, business process automation and workforce solutions. We strive to deliver projects and solutions that sit at the intersection of two identified areas that challenge almost every organization:

- Electronic Content Management – ECM has grown in importance to almost every government and private sector organization and saw an investment of \$3.2B in 2008. IT professionals are continuing to invest in projects in this category at an estimated compound annual rate of 12.2% through 2012, and include all aspects of document management that our solutions encompass. "Delivering ECM aligned to line-of-business and vertically specialized processes increases the overall value of the ECM software and its ability to support business processes and better align content to process requirements." (Gartner)
- Business Process Management and Automation (BPM & BPA) has become essential to organizations looking to increase efficiency, reduce the data burden and who aim for greener business and IT solutions. Investment will grow to \$5.5B in 2011, fuelled by expansion of process management software and hardware. According to Forrester, "Adobe's vision of linking the customer experience to a full BPM capability is a sure-fire winner, particularly in enterprises and government agencies that have large numbers of paper or forms-driven processes that are also customer-facing."

More and more we see considerable overlap in these technology investments and this provides clear opportunities to combine investments to single projects in order to save money, optimize effort and ultimately better solve business problems. Arguably, any successful document and information management strategy is going to include an element of BPM in order to route documents and their information through the right approvals and distribution channels.

Additionally, any business process improvements should be taking into consideration the required documents, information and reporting outputs that are required for all users of the systems impacted. Continuing to invest in separate BPM, BI, ECM and the infrastructure for these projects is simply no longer the right approach.

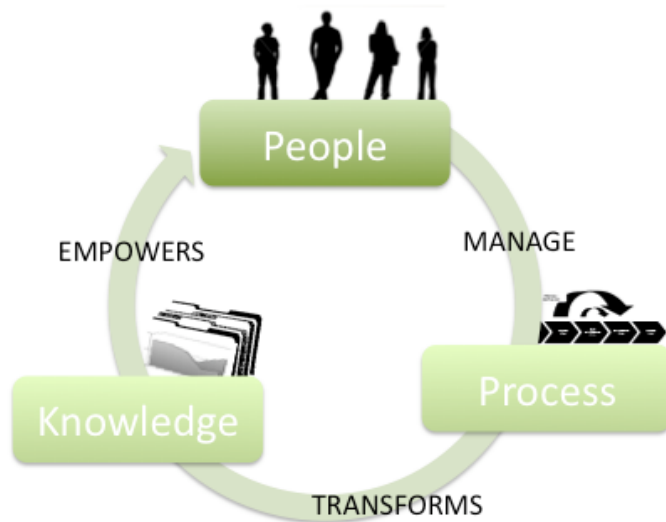
## IMP takes BPA thinking to a new level



IMP thinks about Business Process Automation as an opportunity to assist any organization realize the benefits of a green IT transformation. Therefore, the objectives of our GreenFORMS strategy is to provide a set of practical blueprints, best practices and solution accelerators for the rapid development and deployment of eForms and Business Process Automation (BPA) solutions enterprise-wide. We understand that implementing a holistic eForms and BPA strategy is a long-term commitment that takes careful planning and deliberate execution.

A key element of the IMP strategy, beyond the solutions and integration work, is the greening of IT and specifically your organizations business processes. The World Commission on Environment and Development defines the term sustainable development as "meeting the needs of the present without compromising the ability of future generations to meet their own needs." Every day, we are challenged to think about how we can continue to move forward without harming our environment, keeping it healthy for future generations.

Both private sector and government investment continues to grow in green IT , according to IDC. Service delivery processes shifting from paper documents, in-person visits, duplication of data entry, and bureaucracy-centered workflows to a framework fuel this growth based on better outcomes, self-service, integrated digital records, and citizen-centric workflows.



*Combine content assets, data, documents and processes into user-centric systems that leverage people-centric processes.*

*This will enable new value from knowledge and ultimately empower all users of a system to seamlessly collaborate in a meaningful way.*

Information and communication technology (ICT) is truly experiencing a revolution. Digitization or “Greening ICT” for information collection, exchange and storage impacts all forms of paper-based communications from marketing collateral through forms, reports and personalized correspondence.

Despite market trends and an overall appreciation of the impact BPM and BPA are having on organizational efficiency, implementation of these types of solutions across the enterprise remains a relatively new phenomena. In our experience, the key to any initiative of this kind is to have a clear vision of what your organization is trying to accomplish. Once you do, your organization will be on a path to success – a vision path.

## The Vision Challenge

Many organizations are in the initial stages of defining an enterprise wide business process automation and eForms and strategy. The IMP approach is holistic and helps deliver a comprehensive business transformation vision. In doing so IMP takes on the substantial challenge of deploying eForms technology and bringing business process automation to organizations that have disparate groups that are spread across Canada or around the world. Given the challenges that executing on a significant business transformation holds, we believe the level of success is based on:

- How your organization structures the management and delivery teams
- Whether the projects mandate is established as an organizational priority and how this is communicated to business owners
- Whether the vision to bring this transformation forward is adopted across the organization

## The eForms Vision Solution

It is critically important that your organization take a very deliberate and calculated approach to how it deploys emerging eForms technology. It is also vital to understand that BPA is a business and policy initiative linked to overall organizational transformation and not just an IT project. It is therefore essential that every organization establish a well-defined set of strategic objectives to guide it to achieve its vision at the beginning of the process.

Electronic forms (eForms), including process automation, have evolved into one of the most critical business tools for any organization hoping to increase efficiency, reduce the data burden on its key stakeholders and move to green IT solutions. If leveraged properly an eForms strategy properly executed should become one of your organizations single greatest assets and for your key stakeholders one of its greatest strengths. Automated business processes can now be deployed to remote users, individuals with limited or slow Internet access and even to those with no access at all. As part of this outreach, eForms can now be used to drive almost any business process.

However, in order to maximize on any technology's potential, it is important to first describe the environment needed for success.

Technology projects continue to fail throughout the public and private sector at a rate of nearly 50%<sup>1</sup>. This results from fragmented project teams, poor leadership and a lack of strategic thinking from the outset of a bulk of technology projects. No doubt, every project starts with an idea of what the end result should look like, the difference between success and failure however, often lies in having a complete understanding the path that will get you there.

Equally as important, you need to know how to stay on that 'vision' path. A successful eForms initiative will navigate a defined path that begins by setting clear strategic objectives – the strategic phase; then move through a tactical phase where implementation or process automation occurs; and finally transitions into an operational phase where the Return on Investment (ROI) is fully realized. For your organization to realize its greatest ROI in its use of eForms technology, two things must occur: first, it must define a vision by building a detailed strategic roadmap and second, it must commit to the principle that only with strong leadership, and an engaged and devoted project authority, will it maximize its chance of success to leverage this solution to achieve its long term goals. Your approach needs to be disciplined and straightforward:

1. Figure out where you are going;
2. Determine how long you have to get there;
3. Define the shortest path between where you are today and where you need to get to; and
4. Ensure your organizations leadership commits to the process and is actively involved throughout.

Although this sounds simple enough, there are numerous potholes along the journey that can steer an organization off the path. Generally the greatest risks to this kind of business transformation are lack of leadership and a fragmented project team; the introduction of competing technologies; and having a project team that does fully

---

<sup>1</sup> <http://www.accountancyage.com/accountancyage/news/2146792/kpmg-highlights-project>

understand the business objectives and as a result do not become highly motivated and committed to the vision.

Project teams, whether internal or outsourced, volunteer or compensated, are usually well intentioned and share some vision for the end result, however, the leadership of your organization must actively participate and lead the team to success. The reason this is so critical is that technology is simply a tool that allows an organization to achieve its core objectives, such as overall business transformation. All too often, technology projects end up on a path that is not aligned with where your organization is really headed. As is often the case, technology projects cannot be allowed to take on a life of their own and they must continue to demonstrate business value based on a real organizational need.

To help eliminate risk, your organization must establish a core management team that is involved in all aspects of the process and is tightly aligned to your organizations leadership. Success factors on your organizations critical path include:

- A well-defined and understood vision; this is the primary critical success factor. You should not underestimate the value of a strong and easily articulated vision;
- Documented principles that will guide you through the process; these are essential to assist decision makers in the delivery of an initiative of this kind when formal policies or unforeseen change occur in the project; and
- Clear and measurable objectives.

To achieve its greatest chance of success, this process must move through three phases: strategic, tactical and operational.

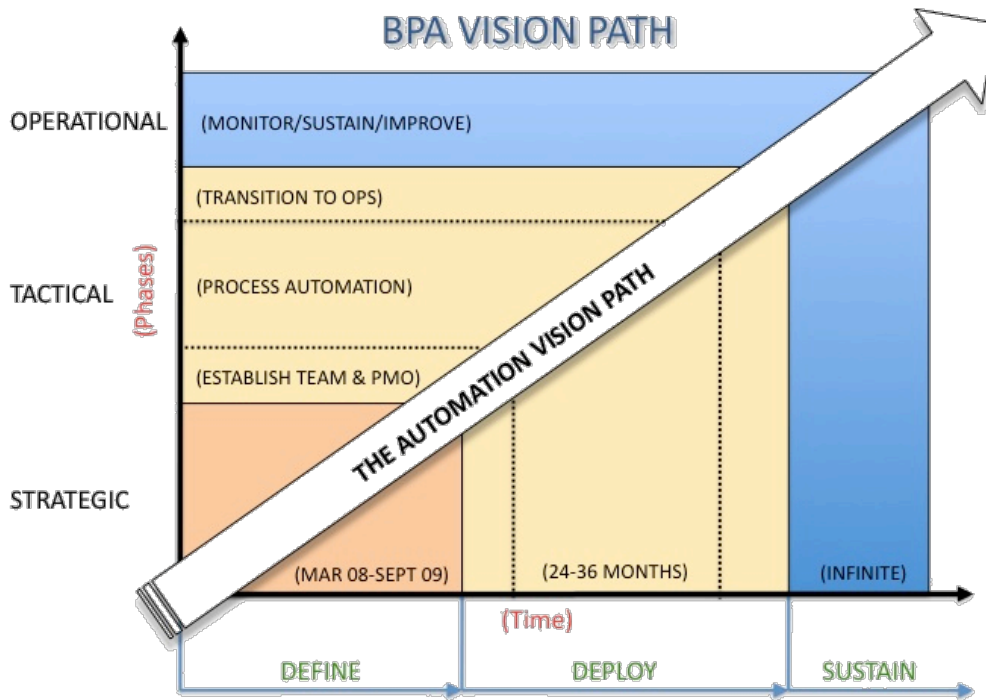


Figure 1. Business process automation VisionPATH

Your organization must take the time to crystallize its vision around BPM/BPA, agree on where this technology can take you and then articulate and validate your strategic objectives. These objectives must then be pursued on a daily basis as individuals perform the tasks required to automate each and every process and get your organization up the vision path. Everyone that touches this project must think "VPO": Vision-Principals-Objectives.

Assuming that you develop a strong vision and lay down a path to achieve your goals it then becomes essential to understand the value an automation program will achieve for your organization.

## Understanding the Value of Business Process Automation

eForms are the heart of an automated business process and are used to transport data between all key stakeholders who belong to your organization whether internal or external. This includes data suppliers, users of the data or decision makers who must get the data, assess it and make key organizational decisions based on what data has been delivered.

If we view the business process as a large transportation network and the eForm as the vehicle that speeds through the network carrying our critical data to each stakeholder, then we can begin to understand where the eForm fits into our organization the requirement to have a transportation network capable of fast, efficient and accurate data transport. IMP leverages Adobe LiveCycle ES as the technology platform or transportation network and we use Adobe Designer to build safe and secure eForms or PDF transportation vehicles.

By using LiveCycle to systematically automate processes your organization will see cumulative growth in capability to get data to anywhere and anyone in your organization on time, securely and accurately. In addition you will see increased cost savings as each process is automated.

Adobe has evolved their enterprise platform into what we believe today to be a revolutionary technology. Adobe LiveCycle ES delivers an innovative and robust approach to eForms, Document Creation and Business Process Automation. This technology acts as a foundation of your data transportation network supplying the vehicles in the form of a PDF that you will use to securely transport your data between departments, people and or outside organizations. So what does this do for your organization strategically?

## Data Burden Reduction

- Empowered data intake
- Reduced data entry and re-entry
- Eliminate process backlogs



## Accessible Change



- Best Practices for new requirements
- CLF Compliance
- All operations meet Accessibility legislation

## Carbon Reduction

- Move away from paper intake
- Stop printing and sending
- Increase productivity



From a more tactical perspective the LiveCycle technology platform drives value and capability at three levels.

### Process components

The power of LiveCycle grows as it is applied across the enterprise through its ability to reuse “components.” Each time you automate a process you will be required to configure components specific to that process. These pieces do not exist in isolation however, and become part of a central library of components that can be called upon for any future automation where appropriate. The result is that as each process is automated components designed for your organization grow and the solution becomes that much more powerful. Additionally, process automation becomes simpler as the time to build or modify a process is substantially reduced. Technically, drawing from a central library of components is called “nested process calls.”

The advantage of using this “nested” strategy is clear, as it allows the re-use of a pre-defined, pre-tested and qualified sub-processes. The one drawback to a components based approach is that if a slightly different requirement exists within a process, a new component must be configured. Nevertheless, over the long term, it will be extremely advantageous to define a series of process components from which larger processes can be built and the power of your data transportation network grows.

## **Fragments**

Like components that are built as part of a process and stored in a library, building eForms can leverage the same concept. A form fragment is a collection of fields or objects that are grouped together to form a “fragment” to collect specific information. By creating and storing these form fragments in a central library, it becomes much easier to assemble forms and documents. As an example, form header information, things like your name, address and phone number will remain consistent across all forms within your organization and by building a header fragment that includes this basic descriptive information it can be instantly applied to each form in your organization as it is built.

In the future as existing forms are converted or new ones created it can be done using these predefined fragments rather than creating a form from scratch - one field or object at a time. Over time, as both the component and fragment libraries grow, making adjustments to your data transportation network (processes) or building new transport vehicles (eForms) becomes routine and extremely cost effective.

Additionally, and this point should not be minimized, significant cost savings are accrued using form fragments to make a change that impacts all or a wide range of forms within your organization. A policy change could in theory impact every form in your organization but because form fragments are stored in a central library file system or in the LiveCycle ES repository – by making the change to the fragment in the library every form in the organization gets automatically updated. This one small function can literally save hundreds of thousands of dollars instantly.

## **Sharing content for Correspondence Management**

Reuse of components and fragments clearly drives value in the creation or modification of a process or form, but LiveCycle takes this one step further in the way it deals with the actual content that is part of correspondence, contracts or almost any document. One of the quick wins that you can realize is leveraging the Correspondence Management Solution Accelerator, a tool that can quickly automate the generation of various types of communication - from straightforward customer letters to complex contracts or regulatory documents. One of the added benefits is that it does this while helping to ensure compliance, integrity, authenticity, and confidentiality of personal information. Like the fragment and component library, you will have a central "content" library that will significantly cut down the time to create documents and in many cases completely automate their creation as part of a process. In our data transportation example, what this means is we can now very quickly and effectively add data or cargo to our transport vehicles to get them moving across the enterprise.

To achieve even greater efficiencies, common content can be written for use in multiple types of correspondence. The Content Creation Components module enables the following capabilities:

- Create common document paragraphs and content
- Categorize content and apply rules when paragraphs are added
- Integrate with ECM and LiveCycle repositories
- Import rich text from word processing software

The Content Creation Components module includes content authoring to create, edit, delete, and manage content used in correspondence management document templates.

## **Extend business process with Adobe LiveCycle Reader Extensions ES**

LiveCycle clearly drives value in the creation, modification and exchange of documents through automation, but where its power begins to really come forward is in its reach. LiveCycle has the ability to extend your data transportation network quickly and effectively to a broad range of locations.

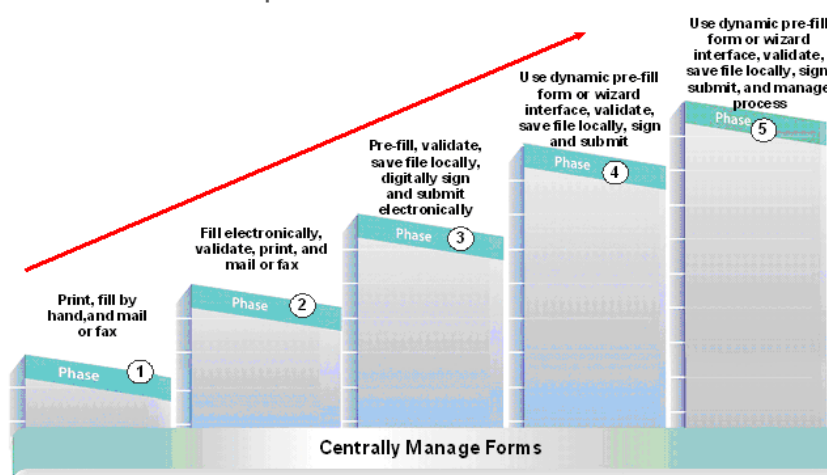
One of the critical success factors to automating processes is consideration of where stakeholders are physically located and the ability they have to access the Internet to actually participate in the process. LiveCycle Reader Extensions extend the reach of every automated process by giving users the ability to securely participate while outside or off the data transportation network. This means even when they are offline at home, at the cottage, or in some cases in a remote part of the world. In context of the data transportation network we are building, this is like adding air service to the rail network we use to transport data across our enterprise and ensures we can transport data to those who simply cannot get it by rail.

Reader Extensions unlock key functions and provide the ability to deploy PDF forms anywhere in a standard format, but more importantly the forms can be worked on using the ubiquitous and free Adobe Reader. Adobe Reader is found on more than 900 million desktops globally and can be obtained easily and at no cost. This results in huge cost savings as the requirement to provide end users or staff with any type of software or plug-in is completely eliminated.

Additional Reader Extension capabilities allow forms and their data to be saved locally; digital signatures to be applied; and comments and collaboration to be completed and all through the users free Adobe Reader.

## The Forms Maturity Model

Whether your organizations users are internal or external, online or offline, the IMP strategy includes all key stakeholders and allows them user-friendly access, where appropriate, to your organizations forms-driven business processes.



*To implement a holistic eForms/BPA Strategy your organization must make a long-term commitment and follow a systematic and deliberate approach that ensures the most cost effective solution is implemented.*

A systematic and deliberate approach reduces forms redundancy and establishes business processes that eliminate manual workarounds that are prone to errors. The Forms Maturity Model provides your team with an off the shelf, but very comprehensive strategic roadmap, to move your organization from its current approach into a streamlined and centrally managed digital environment in a practical and proven way. It is however vitally important that expectations are appropriately set at the beginning of this process and a full understanding of the progressive nature of this strategy is understood. In brief, the maturity model follows a path that systematically increases functionality and efficiency in parallel over time.

In general terms the Forms Maturity Model:

- Creates departmental templates through a common look and feel, applying standardized naming conventions.
- Initially migrate identified forms to print and fill with save offline capabilities. (Reader Extensions)
- Adds field and form level validation, digital signatures, and electronic submit capability. (LiveCycle forms)
- Deploys more complex functionality like dynamic pre-fill, forms based wizards, and full electronic submission over time. (LiveCycle Forms, Workflow)
- Adds form level orchestration, data extraction, process management and complex form based business process automation that provides system to system or human level process automation that includes form level policies.

While the Forms Maturity Model provides a strategic path to move any organization into the digital forms age, IMP's Best Practice Approach acts as a practical and proven methodology to move specific forms through the process and up the maturity model. The Best Practice Approach follows a well-defined and repeatable sequence of tasks and events to get a specific and defined set of forms to a predetermined and agreed to point in the maturity model.

This best practices approach will be derived from key aspects of your forms strategy and will reveal itself as a centre of excellence inside your organization, providing end-to-end capabilities, learning and delivery that ensures maximum efficiency and return on investment.



## BPM Excellence

Centres of Excellence serve as internal practices that support deployment of enterprise-wide business processes.

- Process design
- Actions and change management
- Best practice workflows
- Integration
- Process toolbox
- Process integration modules
- Audit History Reports
- Process dashboard and wiki

Your initial project will also result in two significant standards being produced as part of your centre of excellence - an organizational Global Object Library (GOL) that will be used in all future forms migrations, and a Best Practices Guide that will become the cornerstone for all future forms conversions and automations.

So what are some the challenges posed by existing static or paper based processes that we are trying to fix?

- It is often tedious or impossible to determine where a users data is in the process
- Huge backlogs of forms, documents or associated approvals accumulate
- There is real difficulty in identifying where bottlenecks are occurring in many processes
- There is a substantial challenge to keep track of the status of a process across different internal systems
- Staff members become increasingly more frustrated with the difficulty in performing what should be routine tasks
- Duplication of effort has become rampant in many organizations as users develop their own "stove-piped" solutions to solve the problems inherent in current paper-based or static electronic processes
- The inability of organizations to integrate these "stove-piped" solutions, which compounds problems and creates more frustration

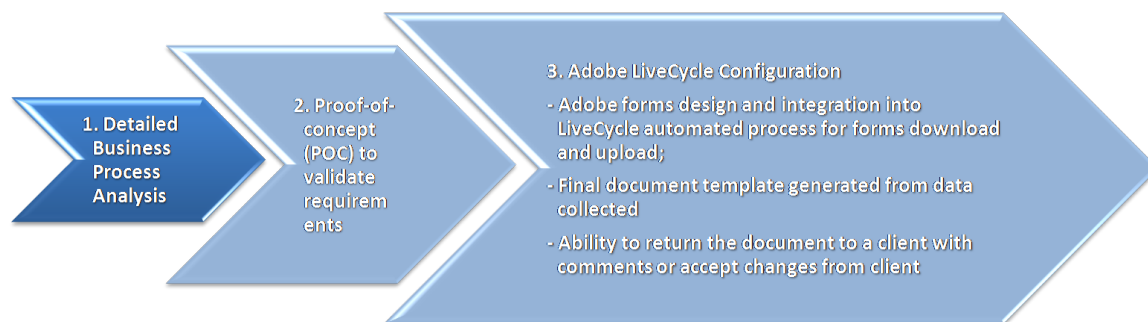
*Most organizations have a considerable backlog of documents and forms requiring process. We can eliminate that backlog quickly, and ensure it is better managed going forward.*



## Solution Delivery

If we go back to the very basic approach we discussed earlier it seems clear that to start we must figure out exactly where it is you are going, how long you have to get there and the shortest path to achieve your strategic objectives. IMP follows a proven best practice approach to do just that.

From its highest level a successful deployment of BPA using LiveCycle includes three phases.



We call the first phase the Discovery, where we conduct both a functional and technical site survey of your organization to create a baseline from which we can all start. Included in the Discovery report are recommendations on the direction your project should take.

The second phase is a "Proof of Concept." This should not be mistaken for simply demonstrating the features and functions of the solution however; this is a full-fledged automation of an existing business process within your organization. We normally choose a complex process that is tied into your critical business systems to demonstrate the power of the solution from as many perspectives as possible.

Finally we move into the deployment phase, which is the process of taking your business processes into production.

## Let's get started

Let us help you get there. Contact IMP Solutions today to discuss the GreenFORMS solutions methodology and our Adobe practice.

[joel.brayman@impsolutions.com](mailto:joel.brayman@impsolutions.com)