# Migrating workflows from paper to digital

When adopting an *electronic signature* solution for your business, one of the biggest hurdles is translating paper workflows to digital workflows. Careful consideration and planning are required to ensure success. This article walks you through four recommended steps to successfully convert your existing paper processes to efficient digital workflows with *Adobe Sign*, an *Adobe Document Cloud* solution:

1. Document your current workflow

2. Map out your digital workflow

3. Migrate documents from paper to digital

4. Perform user-acceptance testing

Step 1: Document your current workflow

The first step is to evaluate your current paper process. What types of documents does your company send for signature? How many approvers do those documents require? How do you deliver them? Capture all your current steps and map out your process in a workflow diagram. The following diagram is an example:
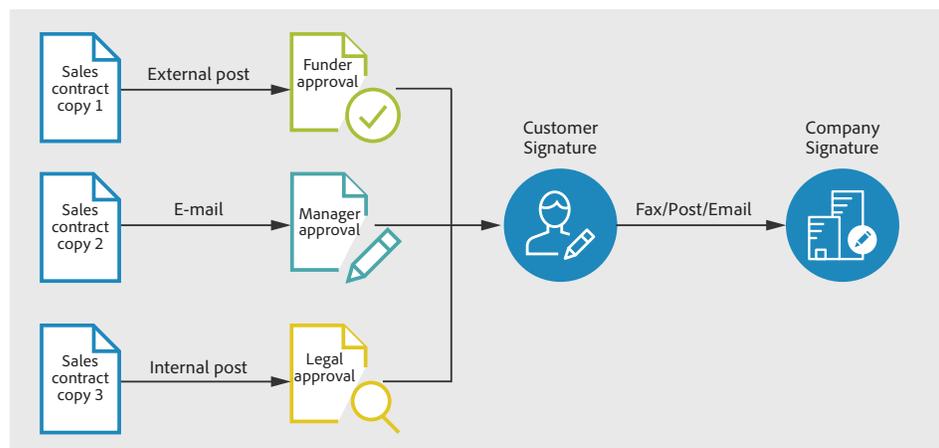

In this example, three copies of the same contract are sent to three separate approvers before going to the customer. Note that a loss of any one of these copies will result in considerable delays.

Step 2: Map out your digital workflow

After you have documented your paper workflow, it's time to map out how your digital process should work. This is the time to remove any redundancies and streamline your approvals. The following are examples of considerations you can take into account in order to make your digital workflow more efficient:

- A legal sign-off confirming the contract has not been tampered with during the paper process may no longer be required.

- Multiple paper copies of a contract are now replaced with one single digital contract.

- Approvals and signatures can be gathered in the order you choose—simultaneously or in sequence. *Learn more.*

- Exceptions can be set up to handle situations where approvers or signers are on vacation or otherwise unable to sign.

Considering these factors, the paper workflow diagram above now looks like this:
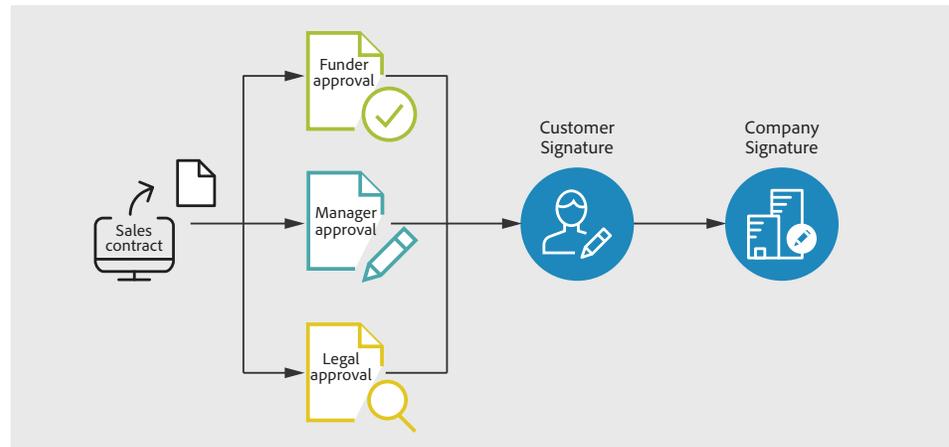
This example shows the digital alternative to the paper workflow example. Adobe Sign takes one electronic copy of the contract and distributes it to the appropriate approvers simultaneously before sending it to the customer.

Step 3: Migrate documents from paper to digital

Once you have determined your new workflow, you'll need to migrate your current paper documents and forms to digital format. There are two important factors to keep in mind: user experience and data quality.

Enhance user experience

A key factor for any agreement is user satisfaction. This is an opportunity to give your customers, employees and suppliers a great experience that reflects your company's values and fosters goodwill.

Forms no longer need to be a space-saving exercise. With paper documents, you may have gathered the minimum amount of information possible just to get a deal over the line and then added an extra page of terms and conditions, inevitably in tiny font. Rather than undertaking a full rewrite, consider these improvements:

- Reorganize the sections of your existing contracts in the way that makes the most sense.

- Make font sizes and text-entry fields larger, so they are easier to read.

- Add color and branding to your documents and forms. Your marketing department can play a key role in helping you add branding elements, such as headers and footers, to enhance the signer's experience.

- Consider using tooltips. Tooltips offer a pop-up description of the information required in a specific form field to help users complete the contract correctly.

- Convert your digital documents to PDF. PDF is the global standard in document portability and accessibility and is optional for a digital *e-signature* workflow. PDF offers a great deal of flexibility by preserving the look and feel of your documents and allows recipients to easily work with your documents across desktops and mobile devices.

Keep in mind that the contract is often the last thing your customers see before a purchase and the first thing they see after a purchase, so make it a positive experience.

Improve data quality

If your documents have data entry requirements, this is a great time to improve areas where your signers make errors that cause the form to be re-issued or add complications to your processes. Common issues include:

- Required fields are not completed (for example, a mandatory phone number field is left blank).

- Incorrect information is put into the fields.

- Date formats aren't clear (for example, a date of birth field could be filled with an E.U. format instead of a U.S. format)

With digital forms, you have the opportunity to eliminate these issues. Talk to your team and find out the biggest signing pitfalls. Then use the tools available during form creation to minimize those issues. For example:

· Make fields mandatory

· Add tooltips to fields to clarify the requested information or give examples

· Add data validation, for example, to ensure you collect the correct date format

Company Car Order Form

Driver Details

Title		Last Name		First Name	
Position		Cost Center	Required field, 5 numbers only	Employee #	
Telephone # (day time)		Mobile #	Format: Numbers only	National Insurance #	Format: AB 12 34 56 C
Email Address	Required field, e-mail addresses only				

The highlighted examples show some ideas for improving the quality of data you collect on digital forms.

Step 4: Perform user-acceptance testing

Try out the new workflow

When you are ready to deploy your use case and start user testing, make sure you cover both the internal and external parts of your workflow.

· Perform a trial run of the workflow with the internal people who are going to be the day-to-day business users of the process.

· Ask repeat customers, or specific customers you have a particularly close relationship with, if they would be willing to help you test your new process on an upcoming agreement.

Collect feedback

Solicit feedback at all stages of the process from both internal and external testers. Ask users to evaluate the workflow with a critical eye, and then gather and analyze all the feedback you receive. And make improvements to address any issues in the process before going live.

Start small and then expand

If you are implementing eSign services across your entire company, consider rolling out your new digital process in stages. Choose one department to migrate first. Learn from that migration, make any necessary tweaks, and then roll out your process to more departments. This will help you work out any unforeseen bugs on a smaller scale before deploying your workflow company-wide.

Summary

By taking the time to define and analyze your current paper processes, you can effectively transition your current manual process to a streamlined digital workflow that takes full advantage of the benefits of e-signatures. To learn more about e-signatures and Adobe Sign, go to *https://adobe.com/go/adobesign*.