10 CRITICAL SUCCESS FACTORS FOR EFORMS

INFORMATIONAL ARTICLE

Ten Critical Success Factors for Electronic Forms

1. **Establish Measurable Business Goals**
   It is critically important to define the specific business benefits you expect your forms projects to deliver. This may sound obvious, but many projects fail because this "obvious" success factor is not observed. Goals should be specific and measurable, with time frames established.

2. **Align Your Business & Your IT Operations**
   While electronic and Internet forms are driven by technology, they are not *about* technology. The point of forms is to improve work process functionality; technology is only a means to achieving that end.

3. **Get Executive Support Upfront**
   Because enterprise electronic forms implementations are strategic initiatives, top management must actively support them. Without executive endorsement, forms initiatives can be viewed as tactical "paper replacement" programming projects and end up being way down IT's priority list.

4. **Let Business Goals Drive Functionality**
   Just as electronic forms projects must be driven by business goals, so must every form decision. If a form doesn't directly help your company better serve customers and improve workflow, you probably don't need to make it an electronic form.

5. **Minimize Customization by Leveraging Out-of-the-Box Functionality**
   Customization is often the costliest, most time-consuming, and most complex component of an electronic form project. Keeping projects within a reasonable scope and leveraging the out-of-the-box functionality of your design program can reduce the need for customization and reduce the total cost of ownership.
   a. "Scope Creep" is an ever-present risk with most projects, as users discover more benefits with electronic forms. Each project scope must be measured against the expected Return on Investment.
   b. Rapid application development is fully achievable for a wide range of forms if each form workflow is kept in perspective. Additional functionality can be added as the benefits become more visible and achievable.

6. **Use Trained/Experienced Suppliers**
   The selection of your eForms software provider is one of the most important decisions you will make. Be sure the provider not only provides a quality, functional product but also provides training, technical support, consulting services, and responsive customer service.

7. **Actively Involve End-Users in Solution Design**
   Unless you solicit and act on end-user input, you run the risk of implementing forms that only address one or two workflow issues while missing the larger picture. Forms serve many functions. Effective forms consider the needs of workflow, container, data, and image. Each user may have a different perspective.

8. **Invest in Training to Empower End-Users**
   Training should not merely focus on demonstrating how to use the software's features and functionality. Whenever possible, it is important to retain the look and function of the paper version of the form to reduce user anxiety and learning curve. Electronic forms contain many features that provide help to the end user. Taking advantage of these features can significantly improve acceptance of the overall program.

9. **Use a Phased Rollout Schedule**
   Most successful electronic forms programs follow a phased deployment schedule. Starting with "Print-on-demand" forms, moving to "Fill-and-print", and then to fully functional "Enterprise-enabled" forms gives users an opportunity to become familiar with how to access and use forms, while delivering a low-cost and immediate benefit to the company.

10. **Measure, Monitor, Track**
    Once an enterprise electronic forms program goes live, the organization must measure, monitor, and track user acceptance, workflow improvements, and effectiveness with an eye to continuously improving the program's effectiveness.