



THE EVOLUTION OF FORMS MANAGEMENT

INFORMATIONAL ARTICLE

The Evolution of Forms Management

The history of the “Forms Industry” is really three different histories. One is the forms product industry, the second is the evolution of specialized tools used for forms management, and the other is the forms management profession. They are three very different aspects of what we do.

We have long talked about the forms product industry. Since the beginning of the industrial revolution, forms were mostly printed in very small, local printing shops and consisted mostly of single-sheet forms. That began to change with the autographic register, which enabled multiple part forms presented on a small machine. The forms product industry really blossomed in the 1950s with the introduction of high-speed computer-driven printers that used continuous forms and could print at 1100-2000 lines per minute. The forms manufacturing industry grew exponentially, and we shipped forms by the truckload.

In the 1970s, digital printing grew rapidly with all-points-addressable printers that, for the first time, could print graphics. Over a relatively short time frame, continuous forms gave way to cut sheet forms, and pre-printed forms were replaced by blank paper. Today, the forms manufacturing industry has all but disappeared; either producers are out-of-business or are diffused into the commercial printing business. Forms products are shifting from paper to electronic format. Virtual forms, including web forms and “apps”, are the real growth.

Many tools used for forms management have also changed substantially. Forms design software has gone through several iterations. Deployment software, mapping software, form filling methodology, and more have all changed or disappeared.

There is quite a different story in the forms management part of the forms industry. Forms Management, as a profession, is and has always been about business process efficiency. Beginning with the Cockrell Committee¹ (1887-1889), a major shift in focus started. This effort was one of the earliest attempts to improve process efficiency. Many inefficient processes were identified in the US Government, mainly due to burgeoning record generation and no easy way to find things. Since most business processes begin with a form, finding a way to streamline forms development and records retention came into focus.

In 1935, the National Archives published a report that stated: “A forms management program eliminates extra paperwork, improves office communications, reduces operating costs, and reveals inefficient or unnecessary procedures.” It went on to say, “Efficient forms provide accurate, dependable, and readily accessible information for policy formation, decision making, and the direction and coordination of operations.” It made many recommendations for improvement to administrative processes. However, World War II intervened and not much was implemented.

After the war, the first Hoover Commission took up the challenge. In the mid-1950s, the Second Hoover Commission provided additional recommendations. It was this commission that published the assertion that “for every \$1 spent producing forms, it cost \$20 to process the forms.” This placed the real focus on improving those processes and not solely on the cost of the forms themselves.

It was the rapid growth of continuous forms, with their inherent complexity, that spurred the creation of forms management departments. Management understood the special training and expertise needed for these more complex forms. In addition, keeping track of the proliferation of forms became a paramount goal. Forms Management departments grew rapidly, as did forms training requirements. Companies were spending millions of dollars on forms and the need for control was evident.

During this time, process efficiency was considered to be an important role for forms managers and process analysis and forms analysis were a major focus. However, as continuous forms matured and became more

of a commodity, forms manufacturers offered inventory and warehousing services to differentiate themselves from the competition. They usually offered these services as “forms management” and process efficiency faded into the background.

During the 1990s, as forms products matured and the shift away from continuous forms accelerated, and as electronic forms grew in popularity, some management people saw a diminishing need for forms management and the trend to downsizing and outsourcing began. Process analysis and process improvement were not considered as a part of forms management. This trend accelerated again with the World Wide Web.

Forms Management as a profession is at a crossroads. While the profession has always been about efficiency and process improvement, this contribution has not been in focus or well understood. As web forms continue to grow as a percentage of the total forms population, the need to manage forms development, deployment, and design efficiency has grown step by step. A new breed of web designers and programmers are just discovering how important usability principles are in forms development as if this is something new. Forms Management can, and should, provide an important service in this area.

Managing all those electronic forms is another challenge. Forms decline in efficiency over time as processes change and evolve. Forms become obsolete and need to be retired. Edition and version controls need to be applied. Forms, regardless of medium, require the ability to implement process requirements, and their business rules, by proper selection and implementation of elements in a forms container.

Still, after all these years, we can learn from the lessons of the Cockrell Committee and return our focus to why we even need forms, and forms management – to improve business processes. That is and remains, the primary role of the Best Practices Forms Management Department. Some things never change!

¹For a detailed view of this work, and that of subsequent committees, visit:

<http://americanarchivist.org/doi/pdf/10.17723/aarc.21.2.j1337301gv1625h0>