

Smart Communications

SMARTIQ™

Get to eSignature Faster:

Maximize the Value of Your
eSignature Investment with
True Forms Automation





In the early days of digital transformation, eSignature was a game-changer for customers and businesses.

Eliminating the need to print, sign, and scan or mail physical documents saved time and effort for customers and employees.

Fast forward to today, and most customers expect any “official” business process to end with a digital signature. This leaves companies asking the question: what does the next phase of digital signing look like?

As companies evaluate solutions that transform these (typically) cumbersome steps, enterprise-wide data connectivity, highly targeted process automation, and ease of use are some of the most crucial considerations. And any chosen technology needs to be able to perform more than one function and solve more than one problem — **it must be able to add value across the board. Period.**

Extending Digital Transformation Before the Signature

Business leaders across sectors are expected to get the most value from every technology investment—which makes ongoing digital transformation a top priority. While electronic signatures do save time, they are only one part of a multi-step process. To truly digitalize the customer experience, organizations must reimagine how customers first engage.

In other words, think of that first touchpoint as a digital domino—where collected information is used to kick off workflows, bring in stakeholders, and ultimately determine the path a customer takes. That same data is then strategically used throughout the customer lifecycle to select future products and route interactions.

And the right technology should do more than transform one process. That's easy. A chosen technology should be versatile and applicable to different problems in different parts of the business, without the need for customizations or modifications. Finding these types of solutions is a very real challenge for companies, as highlighted by [CFO.com](#), and SaaS solutions are “frequently underused.”

With enterprise-wide integration capabilities, a powerful workflow engine, and sophisticated design tools, solutions like SmartIQ can completely modernize and transform the paper-based or form-related business processes that precede eSignature – processes that have weighed heavily on regulated industries for decades.

SmartIQ provides real-time benefits such as data validation, core system updates, secure documentation or photo uploads, status updates, and much more. It easily weaves into any technology portfolio, allowing it to serve as a centralized solution across multiple business units and countless business challenges.





Understanding Effort, Efficiency and Revenue

On the surface, the philosophy behind digital transformation is simple: use technology to generate efficiency and those efficiencies will result in more revenue-generating activity. This doesn't mean digital transformation itself is simple—far from it. But it is important to keep that purpose in mind when evaluating new SaaS technologies.

When it comes to business processes that use a form to collect information that will then be used to prepare documents for signature, most organizations are still relying on paper or static PDF forms. The inefficiency of these processes has frustrated customers for years, and it can take weeks or months to reach an outcome. Meanwhile, businesses grapple with everything from how to avoid re-entering the same information into different systems to how to offer translated versions of forms across multiple channels. The amount of effort required by customers and employees to go through all of this makes it no surprise that many processes never make it to signature.

By implementing a technology like SmartIQ, companies can create a dynamic, conversational end-user experience and simultaneously automate the internal and external approval processes needed along the way—getting more people to signature and getting them there faster. And, with the ability to easily support translated content, let customers pause and resume across multiple devices, and provide a truly mobile-friendly experience, companies can make processes accessible to a much wider audience. No matter what industry you might be in, these things all lead to growing revenue.

Tips to get started:



Start by identifying the most frequently signed documents—and the form processes related to document preparation.



Consider the stakeholders, the roles they play, the languages that need to be supported and—in an ideal world—how you would like people to be able to issue and receive updates and approvals throughout a process.



To take it one step further, consider how you would like to use information collected in one process to determine the experience in another.



Identifying Complimentary Technologies and Investing in Customer Data

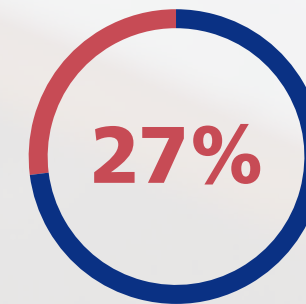
As many companies work with reduced technology budgets, enterprise leaders are taking a closer look at what they are using and how they can do more with existing solutions.

This leads to two questions: which tools can be used to solve other problems and how well do they work with other technologies?

A common thread in finding the best complimentary technologies is understanding the quality and security of the data passing through them. Accurate customer data is no longer important at a “moment in time” – for example, when a call center employee logs a customer service call. The data captured in that moment is invaluable to companies in the future when the customer calls back to discuss other products or services.

In the past, many companies within heavily regulated industries chose solutions such as OCR as something they could do to help interpret data and store it. And while some OCR companies have worked to try and evolve and expand, this type of solution simply cannot offer the data quality and business efficiencies that come with a versatile, connected, cloud-based solution.

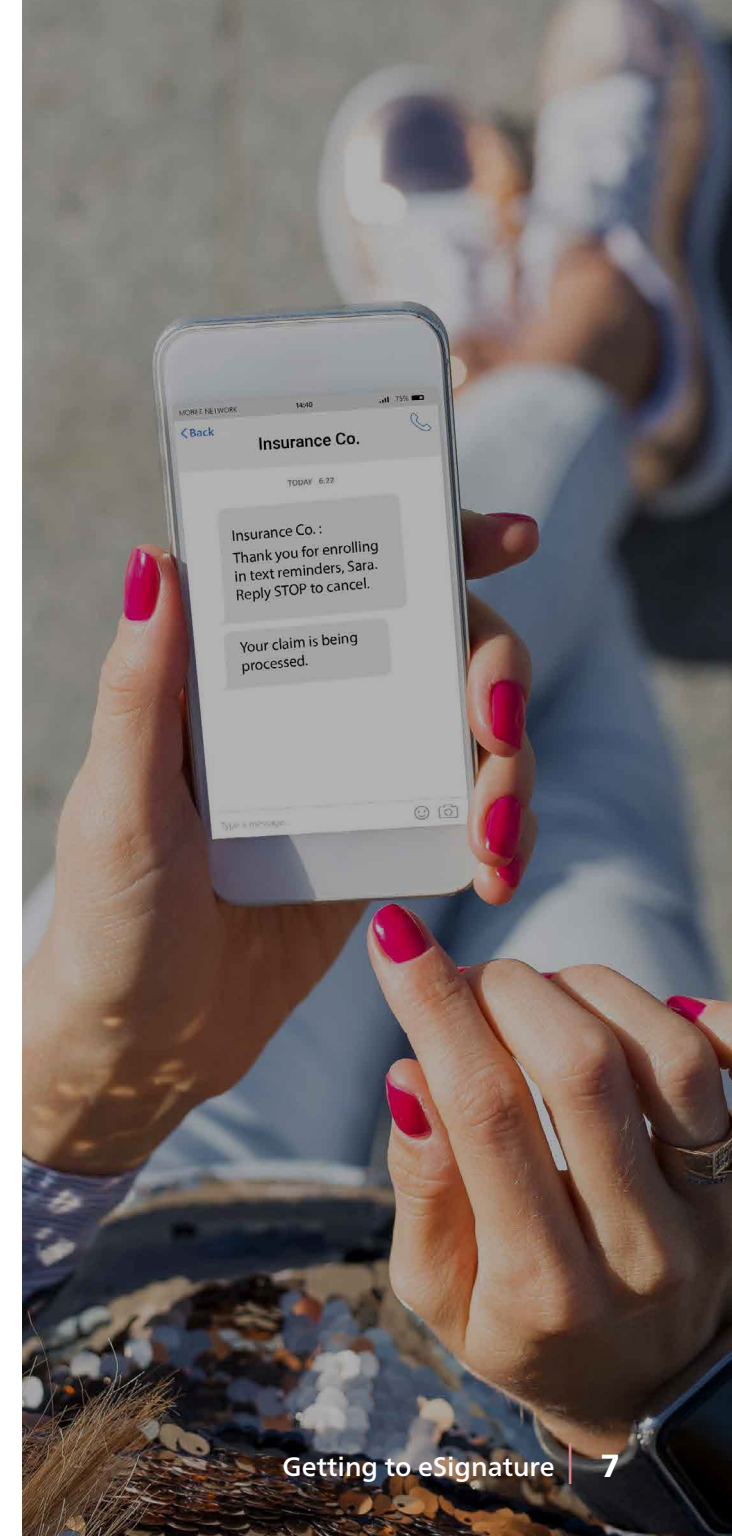
SmartIQ is a mature solution that can integrate with core systems across the enterprise—giving it the ability to ensure data collected is “right the first time” and expedite downstream processes. Pre-built eSignature connectors with DocuSign®, Acrobat Sign®, and OneSpan Sign® enable quick and easy integration with eSignature technologies and support nearly any type of eSignature experience, no matter how simple or complex.



of companies predict that IT spending in 2023 will be lower than 2022¹

SMARTIQ™ Business Automation Hub

SmartIQ can operate as a stand-alone technology or integrate with your existing systems via APIs to validate, update, and transfer collected information.



Adopting Sustainable Business Practices to Drive Brand Value and Consumer Confidence

Digitalizing form-related business processes has yet another major benefit—and, to some, it may be the most important. Put simply, reducing paper usage increases sustainability.

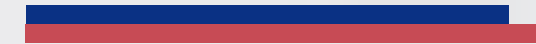
The reduction in paper—and the reduction in fuel consumption that is associated with mailing documents—not only impacts operating expenses, it matters to today's environmentally conscious market. In fact, increasing sustainability can be a key brand differentiator and can help organizations attract and retain top talent.

Processes that involve the manual tasks of printing and mailing have enormous potential as relates to transitioning to more environmentally aware business practices. Whether a company uses OCR, a print house, an in-house processing technology—or a combination of all three—innovative SaaS solutions give companies a path toward more environmentally conscious and efficient business practices.

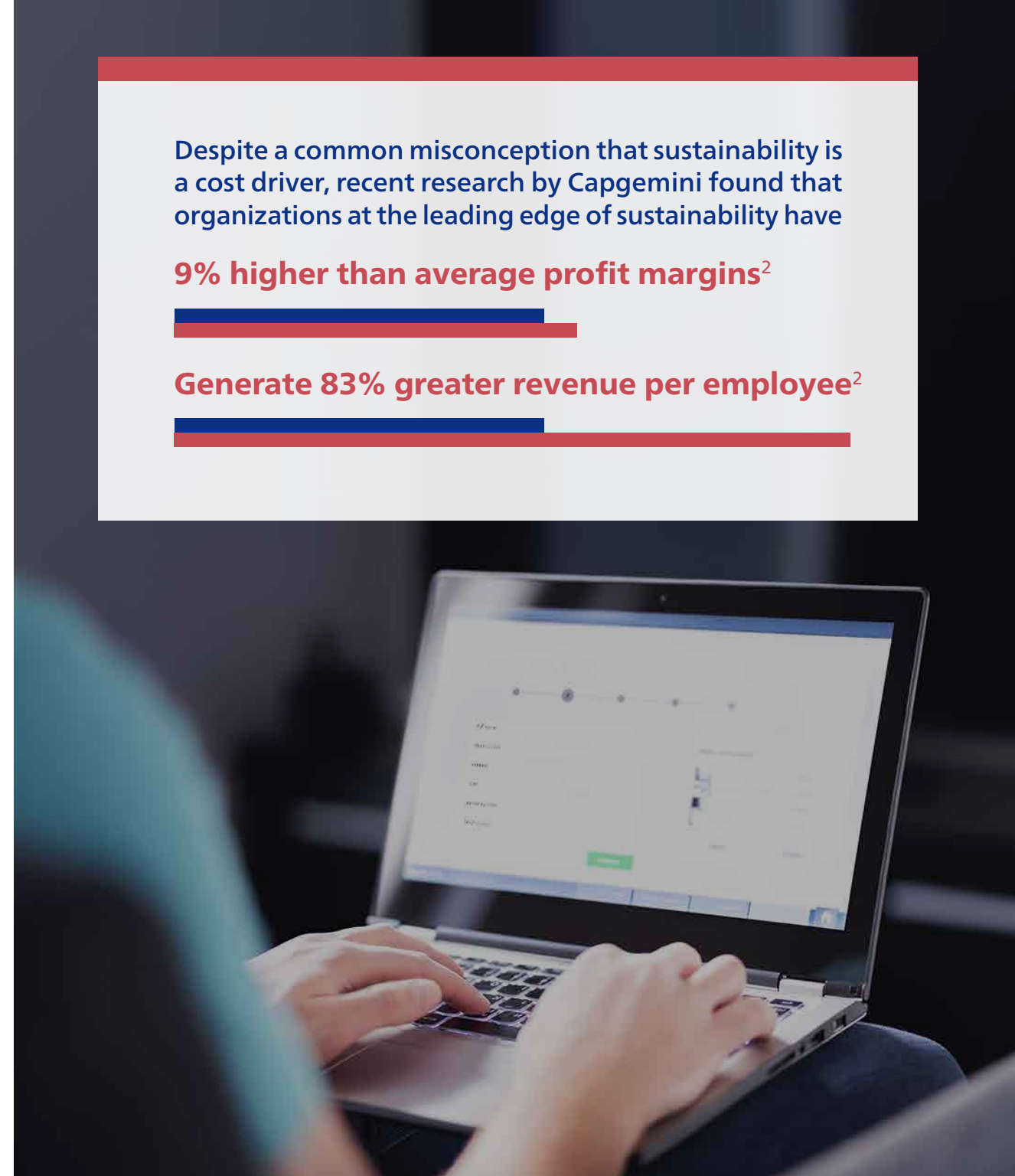
The combination of SmartIQ with eSignature eliminates the need for paper forms or agreements entirely. Yes, there are still some customers who prefer to print forms, fill them out, and sign a physical copy of an agreement—and companies can certainly maintain that option. But by encouraging customers to engage through SmartIQ and eSignature, companies are actively reducing the environmental impact of their business operations.

Despite a common misconception that sustainability is a cost driver, recent research by Capgemini found that organizations at the leading edge of sustainability have

9% higher than average profit margins²



Generate 83% greater revenue per employee²





Addressing Compliance and Supporting Risk Management

Ensuring compliance with regulatory changes is a full-time, critical job for many companies.

From data privacy and consumer protection to accessibility guidelines, requirements are increasing all the time and new regulations appear frequently — particularly for industries that are subject to strict scrutiny (and heavy fines for non-compliance), such as financial services, insurance and healthcare.

In order to adapt to those changes, companies are turning to solutions that are easy to use — not technologies that are so complicated only IT departments can use them. This let's various groups make the changes they need almost instantaneously, instead of waiting potentially weeks or months for IT to process the request. This transfer of business ownership helps mitigate the risk of non-compliance.

Case Study:

AON Boosts Broker Productivity by 15% with SmartIQ

Leading insurance brokerage, risk management and HR consulting services provider, AON, was able to streamline processes and enable more consistent data collection with SmartIQ.



The Challenge

Jonathan Cook, the company's IT manager, explains: "We started on a new technology journey about three years ago and were looking for partners that would become an extension of our team. With rural industry challenges to solve and a vision of how to do that, one of our main issues was the speed of data collection. Our brokers might be out on the road visiting clients for days on end, collecting handwritten information which they'd carry around until they got back to the office and could finally copy the information into our two insurance rating engines to prepare a quotation.



The Solution

SmartIQ enabled AON's brokers to become mobile-ready, giving them the ability to adapt to any device in the field. Streamlined workflow processes slashed the number of manual steps required to generate, modify and present quotes and options by half, effectively consolidating a week's worth of work down to just a few days.



Results & ROI

In addition to streamlining processes, SmartIQ improved broker productivity by 15% and significantly improved the consistency of collected data.

[Read the Case Study](#)

Take the Next Step

Whether your organization has been using an eSignature solution for a while or you're thinking about adopting one, automating related form processes that lead to signature will help you maximize the value of your eSignature investment.

To find out how SmartIQ can help you move beyond eSignature to transform your end-to-end customer experience,

visit us online.

About Smart Communications

Smart Communications is a leading technology company focused on helping businesses engage in more meaningful customer conversations. Its Conversation Cloud™ platform uniquely delivers personalized, omnichannel conversations across the entire customer experience, empowering companies to succeed in today's digital-focused, customer-driven world while also simplifying processes and operating more efficiently. Smart Communications is headquartered in the UK and serves more than 650 customers from offices located across North America, Europe, and Asia Pacific. Smart Communications' Conversation Cloud platform includes the enterprise-scale customer communications management (CCM) power of SmartCOMM™, forms transformation capabilities made possible by SmartIQ™ and the trade documentation expertise of SmartDX™. In 2021, the company acquired Assentis, a leading European software solutions provider specializing in customer communications management (CCM) with a focus on the financial services industry. To learn more, visit [smartcommunications.com](https://www.smartcommunications.com)

References:

1 IDC Research, *2023 IDC Worldwide Economic Outlooks and Attitudes on Customer Data Investments for Customer Experience*, March 2023, Doc #US50524523

2 Capgemini Research Institute

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