



# 5 Ways Optimized Workflows Boost Revenue And Delight Customers



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In a survey conducted by Forbes Insights in association with Adobe and Microsoft, 602 CIOs shared how digitized document workflows drive benefits across the business.

# Customers Get The Personalized Experience They Expect

Organizations with paper-based forms, invoices or contracts—or digital records that sit in silos—can impede information sharing and hinder employees who want to provide positive customer experiences. One telling sign of a poor workflow is the customer who becomes frustrated after they've had to enter the same information into multiple documents or share it with multiple company representatives.

“You end up sending this person across silos within your own organization if [the workflow] is not properly designed,” says Anil Vijayan, partner, business process services at Everest Group.

When information resides in a simple, optimized workflow, employees can streamline customer interactions of all kinds. For example, customers can receive personalized forms, invoices and contracts pre-filled with existing system data—be it from customer relationship management (CRM) or enterprise resource planning (ERP) software. Instead of retyping information they've shared before, customers can focus on what's most important, like reviewing the terms of a contract.



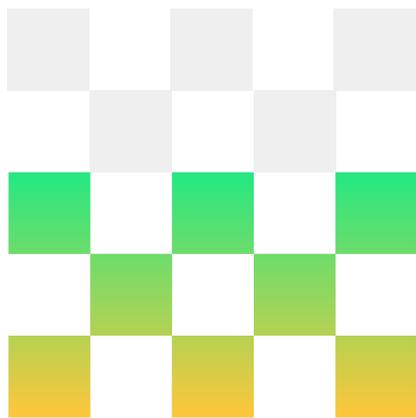
Almost

**2/3**

of executives say  
improving the digital experience of  
employees directly improves the  
customer experience.

Forbes Insights survey with Adobe & Microsoft, 2022

# Employees Can Think Strategically About Customer Service



61%

of executives say fully digitizing workflows and internal processes will reduce employees' tactical tasks, leaving more time for strategic work.

Forbes Insights survey with Adobe & Microsoft, 2022

Armed with the transparency, efficiency and AI-powered tools that digitized workflows offer, employees not only encounter less friction in their day-to-day jobs but also have more opportunities to think creatively and optimize customer interactions.

Consider how time-consuming a new contract is when it must be manually routed for approvals. Within an AI-equipped document workflow, however, the contracts are automatically routed based on internal policies, so the employee doesn't have to waste time figuring out whom to send it to and in what order. Instead, they can simply click submit, and rely on AI for the rest—and reallocate that valuable time to solving customer problems, making personalized recommendations and closing deals.

Salespeople can also benefit from AI-powered tools like next-best action systems, which analyze customer data and identify cross-sell and upsell opportunities. With an optimized document workflow in place, all the right data is also available to a CRM system so sales representatives are notified which customers and prospects are most likely to convert, setting them up for successful conversations.

# Happy Employees Lead to Even Better Customer Experience

The Forbes Insights survey found that nearly two-thirds of executives either agreed or strongly agreed that digitizing workflows improves employee retention. Among the reasons for this: Digitized workflows require employees to perform fewer rote tasks, such as scanning documents and hunting down records, allowing them to focus on more fulfilling work.

Add artificial intelligence and advanced analytics to the workflow experience, and salespeople, for example, become better equipped to perform at a high level through every phase of the customer journey.

“As individuals enter the workforce...they want tools that provide the same degree of efficiency, productivity and contextual experience that they experience as consumers,” says Conner Forrest, senior research analyst at S&P Global Market Intelligence. “As those employees get better access to tools that allow them to work more efficiently through automation, more contextually through artificial intelligence and data management, they’re able to work more

productively in general. But they’re also able to pass that efficiency, productivity and context onto the customers they’re serving.”

Bottom line: *With time-intensive processes taken out of the equation, employees have a more satisfying work experience and are in a better position to offer great customer service.*

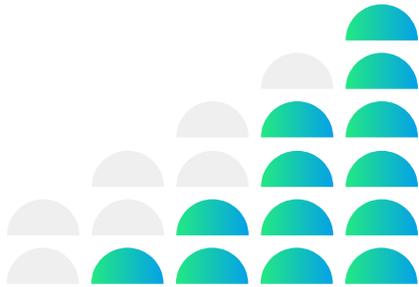


**63%**

of executives say digitizing workflows and internal processes boosts employee morale.

Forbes Insights survey with Adobe & Microsoft, 2022

# Time To Revenue Shortens



# 65%

of executives say that fully digitizing workflows and internal processes increases day-to-day efficiency.

Forbes Insights survey with Adobe & Microsoft, 2022

The faster that customers can connect with salespeople, get contracts signed and processed and have their accounts set up, the faster they can start making purchases—which translates into increased revenue and decreased cost base. A speedy, streamlined experience for customers can also lead to referrals, positive social media mentions and a higher customer lifetime value.

Organizational efficiencies create a positive domino effect, says Holly Muscolino, research firm IDC's group vice president of content strategies and the future of work. On the backend, for example, digitized workflows not only help businesses automate customer onboarding but also lead to faster invoicing, improved purchasing processes and even optimized employee hiring—all of which ultimately benefit customer service and the bottom line.

# Security And Compliance Gain Ground

The risk of paper-based data breaches cuts across every industry vertical, jeopardizing sensitive information about the company storing the data as well as its customers and vendors.

When documents are digitized within a unified workflow, IT can apply a common set of permissions and security features using rule-based processes. The data resides on a server that's either broadly or narrowly accessible, depending on the security required. Compliance improves, too, because documents can be stored correctly, retention policies are easier to adhere to and personally identifiable information is protected.

Forrest says the move to digitized document workflows is one that many organizations are making to maintain productivity and security in a future of increasingly distributed work patterns.

“Companies that want to support hybrid and remote work, or just modern work models in general, are making the investments in digital tools that help them better secure, store, sign and manage documents,” he says.



1/3

of executives say improving an organization's workflow and digital processes ensures data security and compliance.

Forbes Insights survey with Adobe & Microsoft, 2022

**With optimized document workflows, not only do companies gain greater efficiency; they also pass the benefits onto their customers—in the form of personalized documents, faster transactions, better customer service and beyond.**



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