Forms, Friction and Feds: how the federal government can reduce cost and increase flexibility by improved forms management.

SUMMARY KEYWORDS

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Welcome to the federal tech podcast. My name is John Gilroy and I'll be your moderator. Today we have Jeffrey Young, who is a solutions architect from Adobe. Now Adobe is a pretty big company all kinds of room to talk about Adobe. But today, we're going to focus on three things. We're going to focus on forms, friction, and the federal government. So Jeffrey's pretty good summary about our talk today.

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It's pretty good. I like the alliteration.

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Oh, great. So yeah, before the show, I started talking to you, I had an interaction with the federal government last year, that took several, six hour phone calls to resolve. And I think this could have been resolved in other manners than just the telephone calls, it's so expensive to do that from both sides. And I think if you look at just the general of the commercial world, you know, the advent of COVID, everyone's trying to do things online, everyone's trying to be friendly to their customer phone to the citizen and trying to improve the CX. And so my question to you is, is Cx customer experience or citizen experience? So Jeffrey?

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It's a great, great question. And that's why acronyms are so good. It can be really both that the governor is going to focus on citizens, but also they have customers, as well as we also need to think about the workforce experience, their employees as well.

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I've been doing some research on forms. And I found this my research today, and it seems pretty hard to believe. On the one hand, we have a place like the Treasury, and they get 282 million phone calls a year. I don't know what company can handle all that, you know, and and then if we look at switching to paper forms,

instead of doing telephone call, look at paper forms. You know, I think there are all kinds of numbers out there, the National Taxpayers advocate, here's a woman named Aaron Collins, she says there's a 20% error rate on paper forms 20%, Jeffrey said, Hi, your lodge seems high to me, doesn't it?

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I actually thought I think that is a little bit low, just if you think about paper forms, that you're filling it out. And you're losing some of the things that are built in digitally to do the validations and verifications that you're able to do. And it's also interesting to think about some of those forms that you have that initial page that gives the introduction is what the form is about. And then you have the form fill ins. And then because it's created for paper based forms, you don't have those rollovers that we're used to, then you have about three to five pages of instructions, that then you have to you know, go back and forth like an index to the field that you're looking at. And then you submit it in and hope that you did the best you could, and then they may have to come back. And then that's where you're seeing that, you know, call number go way up, because one or two people are going to probably have 10 to 15 phone calls. And it's going back and forth. Because maybe just that initial end user experience was not the ideal state,

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I have to admit, I go back to my tax problem here. I use a Enrolled Agent in Round Hill, Virginia, big town. And he gets what he has forums that his site, he won't even talk to me until it goes through the forms filled every single thing and you've got the line 1819 20 Once he gets it, then all of a sudden he's prepared. He is the tax preparer. And he can answer the questions effectively move on, it was different from my experience with another federal agency. So it's just that I think, in the commercial world, you know, Joe Smith is competing with Sally Smith, and they have to be efficient, and they can't waste someone's time. I mean, efficiency took me two hours and my tax preparer to figure things out. And Sally would take two minutes. Well, I'm gonna Sally, I mean, simply the federal government, you have to reduce this friction of just giving resolving problems, don't you?

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Yes. And I think that's a problem that we're looking at that there's so many different options and so much demographics, both in terms of what technology that they're used, to what devices they have, how they want to have the experience, and what brings them both assurance and trust along the way. So sometimes we need to provide options while still maintaining the goals that you're looking to for secure transfer of informations the ability to fill it out with the accuracy and validations that you want. And so during this transformation, there's a transition process, as you look at starting with paper and moving your way towards almost fully digital while still maintaining a document or record as well as a paper version for those that still want it.

04:24

I do many, many podcast interviews. Last week, I interviewed a satellite company that was opening up satellite high high speed internet to Alaska. And I said, Well, you know, there's a lot of veterans in the West that live in remote areas, and they'd love to have high speed access. He's the same as to Alaska, a lot of veterans up there. And when I think about the veterans and the vets administration, and if there's any group of human

beings in United States that probably needs to be served well or improve their customer service. I think veterans you got to be one of the four or five topless, isn't it?

04:56

Oh, yes, absolutely. And they have a whole lot of forms are there that combination of both the our Department of Defense and the healthcare industry. And we need to be accurate. But there's a lot that revolves around both the security around this forms the data that they're collecting. So we may want to provide the best end user experience. But along the way, we have to ensure that both privacy is protected the security and encryption around that data and then how it's being held. But we want to be able to gather that information, the best way possible. And sometimes it's providing both a mobile experience, as well as a paper, digital and even a paper with a wedding signature.

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When I'm in the classroom, and I like to pontificate make druggies, big statements, you know, and, and so I'd probably make a statement like when it comes to paper based forms, it's been exponential change in the government, but linear progress and many of these forms. And so it seems like there are acts, and there are initiatives to try to improve the customer experience and improve the holy forms. But it seems like it's hard to get in that fire start, isn't it?

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It is, I think, sometimes the acts and the many of the policies that are being handed down the guidance that they have fairly open ended more talking about experience, you don't want to dictate an experience for the most part, but you want to provide a framework. And Adobe really does enjoy that 21st century idea where and if you break that down just as Simon Sinek would on the how, why what is you know, the Y is all about that CX that you're talking about customer citizen experience, and then how they're looking at how do we monetize the web to be responsive? How do we have forms modernization, and then also electronic signatures, and so bring validation to the digital signatures act, and then the what it's going to be data driven analysis, accessibility, always providing a physical option, not only for NARA, but also for those users that want to have it, as well as mobile responsive design. So we like to take and break down those axon toes how, why or what, and then introduce where Adobe can help them through these transformations, while satisfying all the mandates that are being placed in there.

07:10

I have an idea. Let's talk about idea. Let's talk about the 21st century integrated digital experience act with a great acronym idea. So this idea came up about 2018, but two, three years ago, and so it's not like it's brand spanking new idea Jeffrey just bumped this idea out of the woods. And it's no it's it's an idea that the Falcons thought about for years and tried to implement, hasn't it?

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Yes, they definitely have. And there's been some hindrances along the way with where signatures were, but also the reinforcing some previous exit the workforce Rehabilitation Act, we normally hear five a week

compliance. Accessibility is a key part of this. And it's not just to satisfy, you know, making sure that they can be read and you know, the color contrast everything that's involved in it, but it's making sure that everyone is included. And so we never want a situation where someone cannot one fill out a form, why not consume data or content information from government agency. So we definitely believe in that accessibility and then taking that physical option that they have. And that idea is for the NARA records management for things for FOIA. But also having that physical option also provides end users that didn't experience that they may want to if they don't want to fill it out on a web or a mobile device, they want to fill it out on a physical option and providing that as well. They're thinking about this in a strategic way. And we really enjoyed partnering with all the agencies as they're looking to implement this because for good or bad, Adobe is associated with PDF. When people think about Adobe, though, we have a whole lot of other solutions, that I am fortunate to be able to demonstrate how they're being used for the government, Adobe's associated with PDF. And it's really that innovating those digital experiences, all the way back from that in a digital world. But they first started out, they still needed to be able to provide an analog output. So being able to communicate to printers was one of the first innovations that Adobe was partnering with federal agencies. In order to do as they started moving machine machine, they needed to be able to deliver the final product because most products are final deliver the document or records to final Intel. And you can almost guarantee that Adobe Reader or Acrobat is going to be there on the other end. So that way, you can open it just as you created it, no matter the operating system, the monitor the device. So this transformation for creating digital experience. It's all about making sure that it is consistent, efficient, secure. So we take that pride in being a PDF company with great honor. And we hope to also transform some of the other ways that they're thinking of capturing data, signing it, securing it and hoping to build trust within each agency to the public as well as the workforce. Just

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for the record. Yeah, Add guests will be edited soon in Adobe Audition. And so I mean, there's just you can take Adobe and go to this vertical market. It's a, I don't know, probably every radio station town is using it. I mean, every in the country is using and so Adobe is, is really you get locked into one little thing I'm sure audio engineers don't think about PDFs, they think of editing. And so everyone's got a different idea of Adobe, I will be in Los Angeles in a couple of weeks having a lot of fun out west. And, you know, they think the federal government's from Mars or something. So I try to introduce concepts real slowly. And I just think I'm out of my mind. And so I talked about, you know, compliance is really important. The federal government Yeah, no, I mean, it's federal CI is talking about a compliance about every third sentence. So it's really important. And so I imagine there's compliance requirements for forms. Is that right? And, and currently, what level of compliance? Is there a standard with standard forms that are out there for the federal government now?

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Yes. And so the compliance that were we've talked about both 21st century as low as five away, meaning accessibility is the key part to forms. And as we look at forms themselves, and how do we help them transition to a digital and experience not only in looking at life, it was a form. And you think about the DOD and how they currently sign a lot of things with their CAC, and then the PID for some of the other agencies, digital signatures are a key part and Adobe Reader and Acrobat are the core to be able to pull up that certificate chains, and be able to validate and build trust. So that way, it is certified and assigned. And it's using what has already been provisioned with their PKI certificates. And so then we look at that evolution, once you get it to a data layer,

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where I can map a certain field with a particular piece of data, whether the structure is XML or JSON, you're able to now consume from multiple databases and present that where they're just validating the information that's already been obtained. From the end user, as well as having that nice end user experience, knowing how far along they are in the foreign process, it's very encouraging, because we're very used to even seeing you know where our pizza dough is in the TimeTracker, we want to know all this work that we're doing to fill out as well as some of the information has already been obtained, that we're just there to validate that it's correct, as well as having in the right structure, date format, everything can be very different social security numbers, and being able to ensure protection of that. So we want to help them as a are moving from pure paper, getting it to a layer where they can have it as a structured data. And then you can present it on a PDF form and presented on a barcode in case you need to print fax that content and it needs to move from a unclassified into a classified environment or off network to on network, as well as you know what signatures barcodes, provide a data layer for you. And then that data can then get put automatically into your repositories or your your CRM systems. That way the structure is already there. So we try to really first work hard to get them to that data layer. So that way, they can provide both the physical option, the digital option, barcode, mobile responsive event be able to integrate with existing things in their technical landscape like data repositories.

13:21

Now, when he talks about structure and data repositories, the word that came in my mind was scale. And I think about two years ago, we all had experience in the scaling, and how to scale and how to move things up. But I think if it's not structured, well, in the beginning, scale is gonna fail. Whoa, we got summons for a T shirt here, Jeffrey. Dale is gonna fail.

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Yeah, and I think that's the biggest thing that agents are looking to do, how do we scale this and they know that they're taking care of both the end citizens and customers, as we've been blanketing that CX term, as well as the workforce, and they want to provide a great and user experience, there's a lot of mundane administrative things that are, we're looking just to help automate some of those processes, and then to be able to scale that, that you don't want to fill out your address, you know, 20 times on a simple form. So you may want to actually fill out your name, address and some of those pertinent informations and that could actually populate three or four forms. So you have an interface to fill out some of this information, and then still maintain a document record that you can then sign with data that doesn't have to be repeated, whether you're going to use them with things like form fragments, or a like a question answer, just like you and I are having a conversation. It's a it's a preferred way of communicating and providing information.

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So I think we're kind of describing Adobe Experience Manager forms that we were talking about here or getting confused is that

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no, no, you're right. There's Adobe Experience Manager for forms and in combination with that there's Adobe Acrobat and Reader, which have been used to use for filling out forms signing forms. And then there's Acrobat

sign, that is also a form and electronic and digital signature interface that is a SAS offerings that is just recently achieved is FedRAMP, moderate status. So we're really thrilled about providing that option to create the best possible experience for those that have to fill out forms, sign them, process them and have transparency throughout that process. I

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know a lot of my listeners are Garvey's and they are very interested in FedRAMP. And you kind of hit the magic he said, the phrase that pays was that's a radio guy by rates, the phrase the phase is FedRAMP. And I know you folks have you know, I keep thinking of it. COVID is over jawed we go back to meetings, normally events. And so do you guys have from events for guppies, we can ask questions about this and talk as more specific about FedRAMP and try to get the subtleties from PDF and forms managed together? Do you have any events that come up, or maybe you've done in the past, I could help my listeners?

16:02

Absolutely. First is our large government event that we host every year just passed, but their recordings are online, some really great recordings from the federal agencies that are using and how they're using our tools from census, Dia Da, all those folks that you may want to see, you can see those recordings that the vent is called experience makers government forum. And we host that every year in DC. And then we also have a technology that we partnered with Kara soft that goes through and does more demonstration based and workshops with end users. And then my team, we are solution consultants, and we create a specific days for each of these federal agencies. So we'd be happy to conduct some of those on a very pinpoint whether you want to look at experienced manager or whether you want to look at Acrobat or just holistic solutions. How do we collaborate better? How do we produce trusted documents? As we disseminate those? How do we secure them with digital rights management and control the content even when it's left our firewall? Those are some of the things that we're having those deep dives and being able to have those question answers and be able to really partner with all these agencies. We love doing it.

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You know, I've spent hours in rooms with software developers and whiteboards and talking about hot sauce, I don't know. And then we all graphed things. And if I were to describe, probably what you do, I would probably get some boxes. But I would keep the boxes all at one level. It's like, here's PDF, here's what I've been. And I never think of scaling up. You know, I just put them at this one level. And and I think my question to you would be, well, what do you got to Oh, so FedRAMP means so you give the ability to scale. So you allow those boxes in the bottom of the whiteboard to scale up? I think that's the that's the hardest part, I think for most people to think your company has to think of discrete elements rather than as part of an ecosystem.

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Yeah, I think that's one of the challenges in a in this big title that I have as a solution consultant Solution Architect is that we are looking at the strategy as its hold on what are these building block pieces, one, that's an all Adobe solution, it's helping them to achieve their missions and their digital transformation. And it modernization efforts. Or it's also working in integrating with their current technological ecosystem that they

have. Some things are just going to be in place, whether that's their content management system, their data repository, their emails, a notification system, and just how they're currently either signing, creating documents, and then how they are publishing. So we really like to align and help them in their digital strategy to also say that, here's some more the Adobe tools can really help you as you're putting in these into these boxes, that there is this overall layer that they're looking at. And I think Federer is one of them, just to kind of go back to that that rigor and risk management framework is essential for the security. So Adobe, was delighted to, to invest into getting that FedRAMP because we know that ATO that authority to operate on an agency's network or cloud environment is a monumental day, it's whenever we have an ATO with some of our our server based applications, and even how end users are interacting with them. We know that it's something to celebrate not only that we met those high level demands, but we've also accelerated the process so that they can begin using the tools as they desired when we were showcasing them.

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I think it's a full orb story. It's not just the boxes at the bottom of the whiteboard. It's Wait a minute, these boxes can be stacked, oh and integrate with other boxes and all of a sudden you've got the t shirt to go back to T shirts here, the FedRAMP on and go, Hey, you know, we can do that. OMB has been criticized for not giving guidelines on working with forms. And I referenced the idea Act and the criticism has been that we've got this idea act but the OMB hasn't given us any guidelines. I think in the last four or five months they've come up with something have They're might not read this correctly,

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I believe I'll have to dig into some of the guidelines that they have, and whether or not they are whether the mandates suggestions. And I think that's one thing that's really great about being a partner with these agencies from a company like Adobe, is that we can help, you know, with the how and the implementation, I think that the framework is there of, hey, it must have accessibility, it must have a digital experience that is responsive mobile ready, you have to be able to integrate with an electronic signature solution. So all those things are part of those OMB building blocks that align with a 21st century idea, but the how they want to allow for the creativity with all these agencies that all have forms, and there's gonna be a nice centralization for some of these OMB forms. However, I think it's really cool to see that, you know, maybe IRS is doing something really well over here, and VA, also something that allows that how to be creative. And you know, that's the other aspect that Adobe does like to encourage is the creativity. And so sometimes with these constraints, you get the most creativity, as long as we're focused on the why, what are we providing for that? Citizen customer experience?

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Georgetown University allows me to poison the minds of youngsters once a year with a graduate school class I teach and a couple years back, a young man from Deloitte brilliant, and, and I said, Well, what do you do? UI UX? Oh, what do you mean? So about the friction man, so about the friction? I keep thinking of, you know, synthetic oil on my car and friction. And I think that's, that's a pretty good summary, I think for the Jeffrey do. And so there's citizens, there's federal services available. You're like the oil. Yeah, we reduced the friction between a person trying to get what they need from the federal government and not having to make phone

calls, not having to resubmit a paper or heaven forbid, fax a form. I don't want to I haven't said that in 10 years. But that's even possible, I guess. So it's, so it's all about reducing the friction

22:01

is, and I think that going back to why are we reducing the friction? And what are we needing to do provide customer experience, and there is some quantitative values to that, whether that accelerate efficiency is going to bring, you know, a better time and a better experience, more accessibility, building trust, where that transparency, and then you can also equate that to time, money. All those things are a great way to be able to do this. But I think we also got to understand where are we? Where are we starting from, and I think the ethosce understand why we're there. I remind you of the Thomas Sol analogy about the fence posts where you know, you can go and find all these fence posts, and you don't know why it's there. So essentially, you got really two options, is that you want to know why they were there in the first place. I think it's very important. So just ripping them up, is to actually question what was put them there in the first place. And then until you can understand that, you might, if you just rip them up, you might encounter some of the reasons why. So there are some great innovative things that were being thought about when these forms were created, we have to understand what it was trying to do, why it was there, and make sure that we can still satisfy that, in addition to the transformation because transforming for transforming change, for change sake, it's not going to accomplish what you want to do, unless you are understanding the full context of why it currently is. And then how do we make steps while providing those multiple experiences or outputs that the customer experience grow and want to have?

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Okay, Jeffrey, crystal ball time here, I'm gonna put your feet to the fire and get you all kinds of trouble with your boss here. There's a thing called photogra. It's like a scorecard for compliance, certain figures. Should there be and this has been bandied about here? Should there be some kind of scorecard for system experience different websites? And should that be part of a tower separate? Or? Or how can how can you grade someone's capability are, you know, their success with automating forms?

24:00

Short answer is yes. I believe it should be part of that, how you would use that as a metric and being able to run through those checkboxes? Does it do this? How effectively does it do this, some of this stuff is going to be based on experience and the intuitive nature of it. So you need to it's going to be more of a watch. But there's a lot of things that you can check that ensures that it has a responsive design to meet the needs for a mobile forms are being filled out mobile, some complex forms, people much rather fill those out on their desktop, and then the ability to really get to the point of signing, securing all that. All those things. Those need to be part of that and the citizen experience or the customer experience. That does need to be part of the scorecard. So that way we can build that as part of the iterative process as they're creating it. That way. There's at least something they're working towards instead of pumping out and hoping that it's the case. It's nice to have some criteria and a way of an animal I think that

25:00

I'm glad you brought up that mobile versus desktop. Because you know, my kids fill out everything other phones, and I fill everything with the desktop. Now the problem is this. If you design a form, and looks great, and a chrome, the HTML render perfectly in the Chrome, Dan night look great. You pull out your phone and Safari, and there's issues. And you'll say, No, it's responsive. Well, it's responsive, surance responsive. But that doesn't mean it's, you know, it's effective. And, and I think there's plain old HTML, but you get forms in HTML, that degree of difficulty get so much higher with that. And I just, if you can provide some kind of a solution that will appeal to the over 50 and the under 50. And I think that was so much harder to do than talk about, isn't it? Yes, it's responsive. No, wait a minute. That's just like saying, Yeah, we live in United States. But we're in a house. It's It's tricky, isn't it?

25:51

It is tricky. And I think that that's where really in this change management is providing the options, like you said, Know, your kids like to fill out there, they're okay with filling out forms. I think what we've also noticed across the board, no matter what generation at the point of signing, they like to see everything all at once in the structure of a what looks to be a document. That's a point where, okay, now we've gotten all the information, whether they filled it out on their mobile device, or they filled it out on paper, and we barcode it in at that point where they want to sign it having an electronic experience that looks like a document scientist. And that's how actually how, you know, Acrobat PDF, and those digital signatures work, it puts a hash on that, and it secures it. And that way, it timestamps, everything that's got the certificate chains, the security is there. And that's where hopefully, we can provide the experience to fill it out upfront, just like what I said, when we get to that data layer. And now you have these multiple experiences. And one of those in the end is going to be a PDF that you can sign. And sometimes you want to do it in a browser, or sometimes you want to do it in Acrobat or reader, depending on the type of signatures that you want.

27:02

Oh, that's great. Well, unfortunately, here, Jeff, we were running out of time, I, I hope our listeners get a better idea of what the Adobe Experience Manager form solution is all about. And maybe the ways you can help in the future with the different events that you have, and, and some of the maybe consulting opportunities, you have to help them figure out exactly what FedRAMP means for something as practical as Adobe, You have been listening to the federal tech podcast. My name is John Gilroy, I'd like to thank my guest, Jeffrey young Solutions Architect at Adobe.