Digital Document Processes In 2020: A Spotlight On APAC

APAC Results From The August 2020 Thought Leadership Paper "How Digital Document Processes Are Shifting From Best Practice To Business Necessity"

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Respondents from APAC organizations report that 43% of their revenue is at risk due to a lack of digital alternatives.

Organizations that are the most successful at maintaining business continuity have a higher adoption rate of digital document processes.

Introduction

In the wake of the global pandemic, online interactions augment and, in many instances, they replace in-person interactions. To continue to service their customers and enable employee collaboration, companies in the Asia Pacific (APAC) region are forced to reassess their digital capabilities, taking digital document processes to the forefront.[1]

In this environment, how are digital document processes strengthening business resilience? What role will these solutions play post-pandemic?

Adobe commissioned Forrester Consulting to answer these questions and to evaluate how digital document processes are helping businesses maintain their operations and serve their customers in the face of this unprecedented global crisis. Forrester conducted an online survey with 450 senior IT and business decision makers based in North America, Western Europe, and APAC with responsibilities for digital document processing at their organizations.

We found that organizations in APAC, particularly in India and Southeast Asia, have more business at risk due to a lack of digital alternatives than organizations in other regions. Decision makers there are realizing the importance of digitizing document processes with the ability to share, review, sign, and store documents virtually — a foundational element for business agility and ongoing resilience. We see them responding by significantly expanding their use of digital document processes and shifting these solutions from being best practices to business necessities.

KEY FINDINGS

› **APAC is the region with the most revenue at risk due to a lack of digital alternatives.** The sudden virtualization of the working environment is putting APAC organizations in difficult circumstances. On average, respondents from the region say 31% of their organization's customers are at risk due to a lack of digital alternatives to service them, and an alarming 43% of revenue is at risk.

› **Many organizations in APAC are accelerating adoption of digital document processes to unlock business opportunities.** Forty-six percent of respondents from APAC say their organization is planning to further digitize its document processes in the next 12 months, and it's up to 62% in Hong Kong. To support this, organizations will increase their investments in these solutions by an average of 51% over the same period of time, despite the economic downturn. This demonstrates the importance of digital document processes in supporting remote employees and business continuity.

› **Digital document processes are becoming standard protocols across APAC.** Of respondents with regional organizations that do not consider prioritizing digital document processes solutions to be a standard protocol yet, 68% (and up to 78% in Southeast Asia) say this is now changing and becoming a business necessity.

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Organizations In APAC Have The Most To Gain By Digitizing Document Processes

Our study found that APAC is the region where paper-based processes are the most predominant, and it's where organizations have the most business at risk during the pandemic due to the lack of digital alternatives. By adapting quickly, digitizing documents is a great opportunity for APAC organizations to support their employees and customers in a world where remote work and operations are becoming the norm.

› **Remote work is here to stay.** Thirty-six percent of the workforce in APAC will continue to work remotely on a regular basis post-pandemic.[2] That's up 15% from before the pandemic, and it's the biggest jump across the regions in the survey (see Figure 2).

› **APAC organizations have not digitized their document processes on the same scale as other regions.** Only 40% of surveyed knowledge workers in APAC say their organization currently uses digital document processes (vs. 57% in North America), and only 13% consider e-signature to be a standard protocol (vs. 62% in North America). This lighter adoption is also reflected when it comes to deploying technologies to support distributed workforces. Only 54% of respondents from APAC say their organization has provided its employees with technologies to assist or improve virtual working versus 78% from North America.

› **A lack of digital alternatives is putting APAC organizations revenue at risk.** Not all organizations were prepared for a transition to a fully virtual environment. This is putting more APAC organizations — particularly those with minimal digital document processes — in a difficult position. Respondents with companies in the region report an average of 31% of at-risk customers due to a lack of digital alternatives to service them, and an alarming 43% of at-risk revenue (see Figure 1).

> "Improving client relationships, particularly during these difficult times, makes digital document technologies critical."
>
> *Operations vice president, life sciences firm, India*

Figure 1

"In light of the COVID-19 pandemic, and to the best of your knowledge, please indicate the percentage of at-risk revenue at your organization due to a lack of digital alternatives."
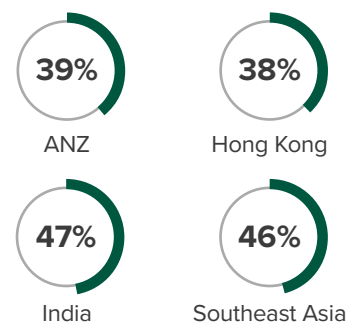
39%	**38%**
ANZ	Hong Kong

47%	**46%**
India	Southeast Asia

Base: 200 senior IT and business decision makers based in APAC with responsibilities for digital document processing at their organization
Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, June 2020

Figure 2

"To the best of your knowledge, and in light of the COVID-19 pandemic, what proportion of your workforce is working remotely (e.g., home worker, teams split geographically, etc.) on a regular basis (e.g., at least once a week)?"

	Average % of workforce		
	working remotely before COVID-19	expected to work remotely post-pandemic	Δ Delta
ANZ (Australia and New Zealand)	14%	35%	+21%
Hong Kong	17%	38%	+21%
India	15%	36%	+21%
Southeast Asia (Indonesia, Malaysia, Singapore, and Thailand)	17%	36%	+19%

Base: 200 senior IT and business decision makers based in APAC with responsibilities for digital document processing at their organization
Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, June 2020

Respondents from organizations in APAC anticipate 36% of their workforce to continue to work remotely on a permanent basis.

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Digitizing Document Processes Is Shifting From An Operational Initiative To A Strategic One

There are dependencies between the use of digital document processes and a company's ability to maintain business continuity. The most resilient organizations have higher adoption rates of digital document processes. In surveying 200 respondents from companies in APAC, we found that awareness about the importance of digitizing document processes is rising as:

> **The pandemic is forcing organizations to rethink their digital roadmaps.** With the pandemic catching most organizations off-guard, organizations across APAC are increasingly investing in technologies to fill operational gaps.[3] Indeed, 77% of respondents from companies in the region (and up to 86% from companies in Southeast Asia) say their business is shifting priorities away from broader digital transformation initiatives to more tangible or concrete projects to support business continuity. This includes digitizing document processes. Sixty-nine percent of respondents say their organization considers it a very important or critical requirement to elevate its digital maturity.

> **APAC organizations are shifting their perception of digital document processes from an operational to a strategic need.** Prior to the pandemic, the top benefit of digital document processes to APAC organizations was the reduction in printing and storage cost (67%). But the new working environment is revealing fresh opportunities to these organizations. Forty-eight percent of respondents say these solutions will increase customer satisfaction post-pandemic vs. 29% pre-pandemic (see Figure 3).

> **Organizations do not consider digital document processes as a "point solution" anymore, but as an integral part of the IT landscape.** Integrating digital document processes with everyday productivity applications has become very important or critical requirement for 59% of APAC respondents. Digitizing workflows holistically with end users in mind is helping organizations to reap all the benefits from their modernization initiatives.

> **Collaboration features are crucial for business resilience.** Collaboration features such as document sharing (74%); document editing, annotations, and format conversion (66%); and document tracking for accelerated workflow (60%) are particularly in demand in the region. As maturity in using digital document processes increases, APAC organizations will catch up with other regions and start prioritizing more advanced features such as document data and analytics.

"Digital document technologies enable mobility for workers, applications, and data."

Chief operations officer, state government institution, Australia
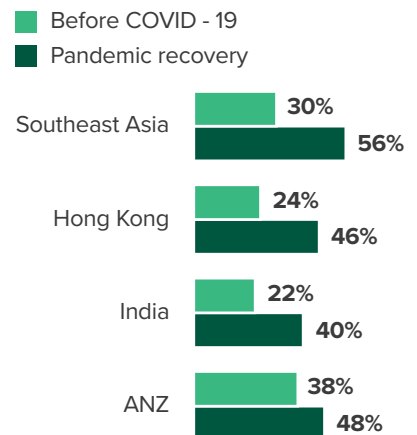
Figure 3

"In light of the COVID-19 pandemic, please select the most important benefits from these solutions to your organization."

Increasing customer satisfaction

- Before COVID - 19
- Pandemic recovery

	Before COVID-19	Pandemic recovery
Southeast Asia	30%	56%
Hong Kong	24%	46%
India	22%	40%
ANZ	38%	48%

"Organizations are adopting digital document technologies because they are very easy to use and cost-effective as well."

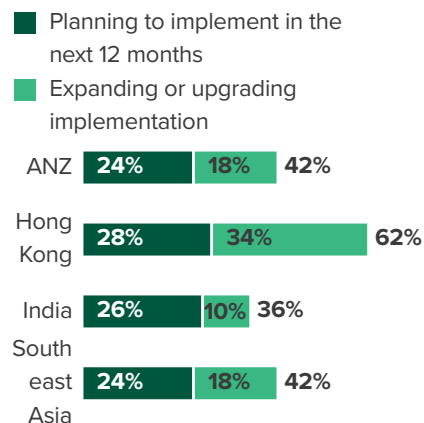*IT Director, electronics firm, Hong Kong*

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Adoption Of Digital Document Processes Is Accelerating In APAC And Unlocking Business Opportunities

The shift of perception towards digital document processes is driving an acceleration in user adoption and transforming these solutions from "nice to have" to business necessities. However, that trend is slower in APAC than it is in other regions. APAC organizations must boost their efforts, or they risk leaving frustrated employees and customers behind.

› **The use of digital document processes is growing across the whole region.** Forty-six percent of respondents from APAC (vs. 63% from North America and 56% from Western Europe) say their organization is planning to implement or expand its digital document process capabilities in the next 12 months. Forty-two percent also say that the crisis is causing an acceleration in user adoption of e-signature. Implementing or expanding is particularly the case in Hong Kong (62%) (see Figure 4). Whereas in India, despite having a lower adoption rate of these solutions, organizations are not prioritizing further deployments in the same proportion (36%). This can be explained in part by the lower penetration of reliable internet and connectivity in the country.

› **To better serve customers, investments in digitizing document processes is increasing.** Fifty-eight percent of respondents with APAC organizations (and up to 68% in Hong Kong) report that their customers want improved digital alternatives and interactions. In response, investment in digital document processes will increase on average by 51% over the next 12 months, despite the recession (see Figure 5). This demonstrates the common understanding that digital document processes play a key role in enabling business continuity.

› **Digitizing document processes improves employee productivity and collaboration.** In this remote workforce environment, 65% of respondents in APAC (vs. only 28% in North America) report that a lack of adequate technology and tools is impacting employees' productivity. This number is even higher in India (78%), creating a major disruption to the daily operations of organizations and employees. Digitizing document processes improves employee experience (EX), as 45% of respondents with organizations in APAC report that digital document processes improve employee productivity. Fifty-two percent also indicate it enables effective collaboration while working remotely.

› **Digital document processes are crucial to digital success, and APAC organizations are strengthening their capabilities.** Of the respondents with organizations in APAC that do not considered prioritizing digital document process solutions as a standard protocol, 68% (and up to 78% with organizations in Southeast Asia) say their organization is now changing. To further advance digital capabilities, 69% of respondents from APAC say their organization is thinking about adopting digital document processes and tools as a top priority along with a mix of complementary initiatives and technologies — such as driving change in organizational culture and employees' behaviors (67%) and expanding automation capabilities (66%).

Figure 4

"What are your company's plans when it comes to digital document process solutions over the next 12 months?"

■ Planning to implement in the next 12 months

■ Expanding or upgrading implementation

ANZ	24% 18%	42%
Hong Kong	28% 34%	62%
India	26% 10%	36%
South east Asia	24% 18%	42%

Base: 200 senior IT and business decision makers based in APAC with responsibilities for digital document processing at their organization

Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, June 2020

"Digital document technologies improve levels of service and ensure streamlined processes for both our customers and our employees."

Chief finance officer, financial services firm, Indonesia

Figure 5

"To the best of your knowledge, how will spending on digital document processes and tools evolve at your organization over the next 12 months?"

ANZ	+49%
Hong Kong	+58%
India	+48%
Southeast Asia	+50%

Base: 200 senior IT and business decision makers based in APAC with responsibilities for digital document processing at their organization

Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, June 2020

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Key Recommendations

The global pandemic is showing APAC businesses the importance of cloud solutions such as digital document processes to serve customers remotely and keep remote workers productive. Forrester's in-depth survey of 200 APAC-based senior IT and business decision makers about digital document processing yielded several important recommendations:

Use digital document processes to help manage a mixed model of work and customer service. Being able to manage a hybrid environment where virtual delivery and interactions are more critical than ever makes digitizing document processes core to day-to-day operations. It increases an organization's agility and flexibility, which is key to ongoing business resilience. To elevate digital maturity and bridge the gap with other regions, business and technology leaders in APAC must future-proof their organization by reassessing their business continuity planning and preparedness plans to include business systems such as digital document processes designed for redundancy and dependability.

Remember that digital document processes are as valuable in the front office as they are in back office. Failing to digitize both front- and back-office departments and processes will erode the benefits of these solutions. Decision makers with organizations in APAC should seize the opportunity now and identify key use cases in every department that slow or delay business value due to manual or paper-based steps. Applying digital document solutions to enable collaboration, sharing, e-signing, and storage will bring immediate benefits.

Digital document processing solutions are sound investments that address both immediate and long-term needs. Given the current economic uncertainties, technology leaders in APAC must be cognizant of their company's situation, revenue outlook, and resources as they adjust budgets during the pandemic. And so they must look at prioritizing projects, processes, and technologies that focus on business resilience or new ways of working. Digitizing document processes addresses both elements, which makes continued investment in these capabilities a sound choice in tough times.

Recognize the importance of digital document processes as a milestone to digital maturity. Decision makers with organizations in APAC must recognize the value that digital document processes provide in underpinning their business resilience efforts, but they must also consider them as a milestone to elevate digital maturity. In this respect, digital document processes are foundational tools that are cost-effective and quick to implement, when more complex digitization initiatives will take some time to provide benefits.
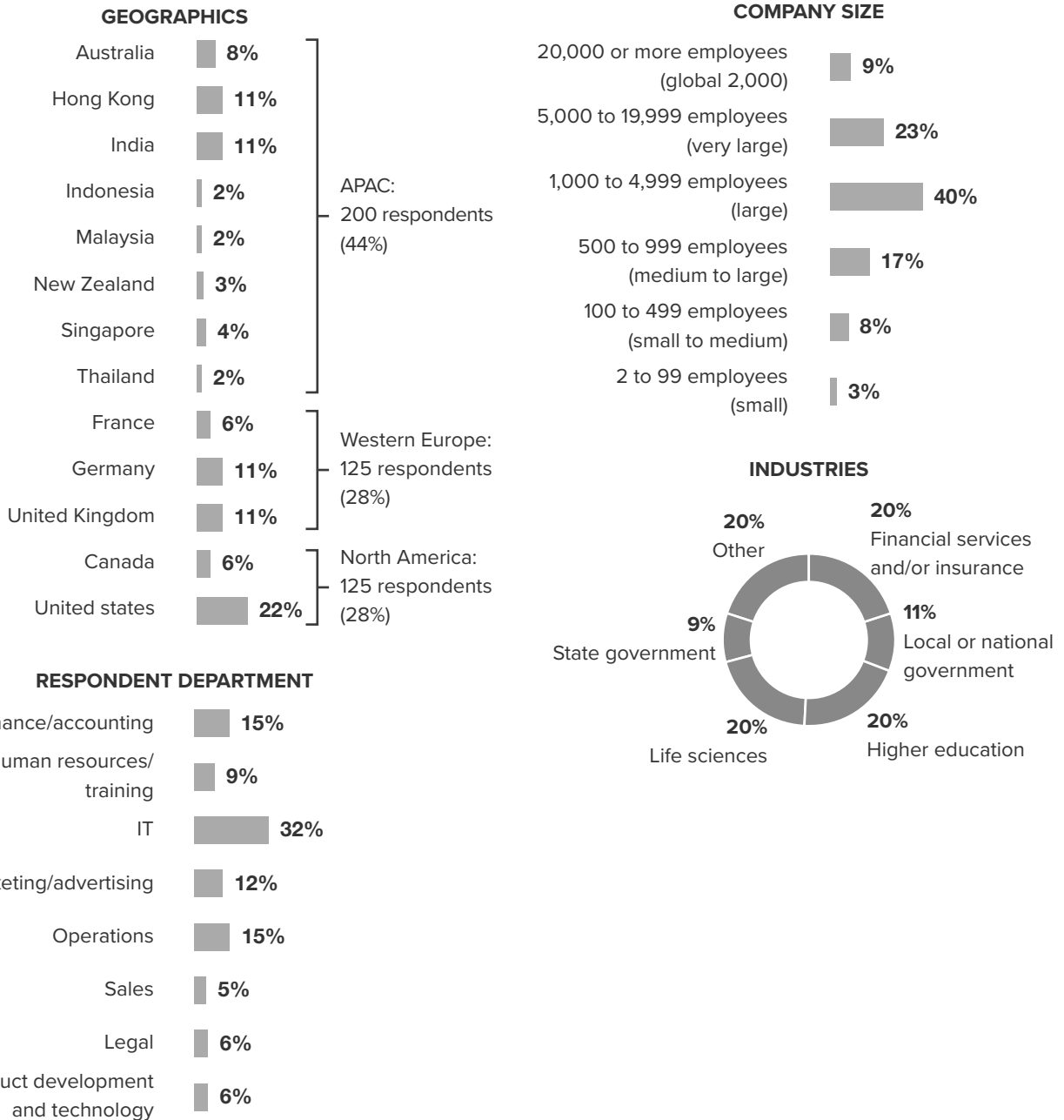
Ramp up digital workplace skills. With the lowest level of adoption rate across surveyed regions, it is crucial for business and technology leaders in APAC to take a human-centric approach when digitizing document processes. They should support change management with innovative rollout and training programs adapted to remote working in order to assist their workforce, and customers by becoming more fluent with sharing documents, setting up virtual conferences, and working with collaborative environments.

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Appendix A: Methodology

In this study, Forrester conducted an online survey of 450 senior IT and business decision makers based in North America, Europe or APAC with responsibilities for digital document processing at their organization to explore how digital document processes are supporting business continuity. The study began in May 2020 and was completed in June 2020.

Appendix B: Demographics/Data

GEOGRAPHICS

Australia	8%
Hong Kong	11%
India	11%
Indonesia	2%
Malaysia	2%
New Zealand	3%
Singapore	4%
Thailand	2%

APAC: 200 respondents (44%)

France	6%
Germany	11%
United Kingdom	11%

Western Europe: 125 respondents (28%)

Canada	6%
United states	22%

North America: 125 respondents (28%)

RESPONDENT DEPARTMENT

Finance/accounting	15%
Human resources/ training	9%
IT	32%
Marketing/advertising	12%
Operations	15%
Sales	5%
Legal	6%
Product development and technology	6%

COMPANY SIZE

20,000 or more employees (global 2,000)	9%
5,000 to 19,999 employees (very large)	23%
1,000 to 4,999 employees (large)	40%
500 to 999 employees (medium to large)	17%
100 to 499 employees (small to medium)	8%
2 to 99 employees (small)	3%

INDUSTRIES

- 20% Financial services and/or insurance
- 11% Local or national government
- 20% Higher education
- 20% Life sciences
- 9% State government
- 20% Other

Base: 450 senior IT and business decision makers based in North America, Europe or APAC with responsibilities for digital document processing at their organization
Note: Percentages may not total 100 because of rounding.
Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, June 2020

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Appendix C: Supplemental Material

RELATED FORRESTER RESEARCH

"Center Your COVID-19 Recovery Planning Around Employee Understanding," Forrester Research, Inc., June 17, 2020.

"The Pandemic Recession Demands A Digital Response", Forrester Research, Inc., June 25, 2020.

"Your Automation Psychology And Roadmap Just Shifted Gears", Forrester Research, Inc., May 29, 2020.

Appendix D: Endnotes

[1] Digital document processes include any processes, workflows, or platforms to manage the creation, collaboration, distribution, and storage of digital documents and records within the guardrails of corporate policies. This includes solutions that allow for reading, editing, signing, and sharing of PDFs and other documents.

[2] Working remotely: Workforce (e.g., home worker, teams split geographically, etc.) working remotely on a regular basis (e.g., at least once a week).

[3] Source: "Business Technographics Priorities and Journey COVID-19 Recontact Survey, 2020," Forrester Research, Inc., June, 2020.

To read the full results of this study, please refer to the Thought Leadership Paper commissioned by Adobe titled "How Digital Document Processes Are Shifting From Best Practice To Business Necessity."

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