

Success Story: National E-Signature Deployment

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How is this session structured?

- Where does my experience come from? (2m)
- What environment was this in? (3m)
- What tips will I share? (15m)
 - Platform selection
 - Architecture and integration
 - Transformation planning
- Results
- What questions do you have? (10m)



Context For The Digital Transformation



- National Financial Services Company
- 1000's of offices
- Custom origination system
- Replace paper / Improve UX
- Most documents up for replacement
- Older M & A infrastructure
- VDI "mash up" environment
- No wireless infrastructure
- Windows 7 OS, Older IE
- \$10M+ project
- 36 month process



Platform Selection

- Tested several wired solutions
- Decided on USB Display with Pressure Sensitive Pen
- Considered usage beyond initial project
- Sought a fully branded company solution and customization
- Company was not cloud centric
- Requirements drove a solid but limited vendor list



Platform - What Worked & What Didn't Work

- E-Sign Vendor met requirements through smart customization
- Negotiation with larger volume paid off
- Timelines met for initial pilot
- Testing the diverse environment configuration
- VDI created issues with e-Sign and tablet vendor
- 3rd party drivers complicated relationships



Architecture and Integration

- Built an abstraction layer between the app and vendor products
- Built a limited and business centric API
- Built for 96% of volume
- Forms centralized and automated
- Hosted in private cloud
- UX team heavily involved



Integration - What Worked & What Didn't Work

- Abstraction and Business API
- User experience workflow
- Integration with system
- Forms to E-Sign automation
- Avoiding the exceptions



- UX team flexibility
- EA vs Legal vs BL teamwork
- Location of abstraction layer
- First time using private cloud



Transformation Planning

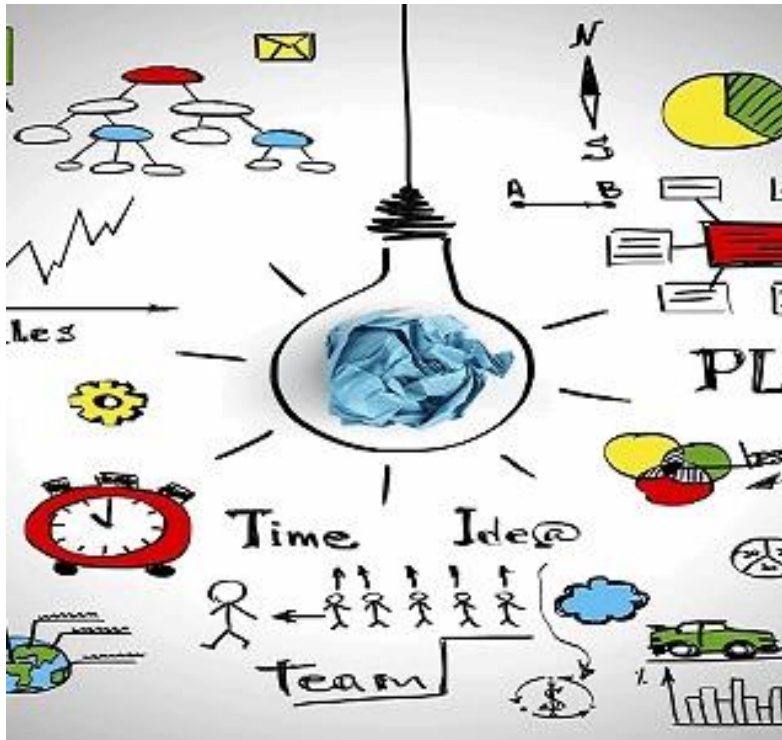
- Heavy ETM involvement
- Piloted in isolated branches
- Large CapEx – 1 Release
- Built training into LMS
- Added a test option into PROD environment
- Added adoption reporting into the up front platform
- Defined conditions for success



Planning - What Worked & What Didn't Work

- Pilot with limited branches
- LMS training and test option
- Adoption reporting
- Conditions for success
- Insufficient testing
- Lack of representative environments
- 1 giant release - late issues
- Pace of rollout delayed





Results

- Costs and duration within original estimates
- 60% adoption
- Adoption driven mostly by employee and management
- VDI and E-Sign / Tablets still tricky
- Attempting to standardize the office environment
- Moving on to new business lines
- Overall 8 out of 10

How to make it a 10/10?



Absorb costs to standardize and modernize



Abstract business apps in the right location



Have vendors certify the environment



Achieve early agreement from all parties



Know early if you are "the first" at anything



Automate forms to save time



Get value sooner with iterative release



Prepare for cloud security



Define clear conditions for satisfaction early



Questions?

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