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Forward

“Today’s consumers have been trained by companies like Amazon, Uber, Apple and Netflix to **expect instant experiences anywhere**, especially on their mobile phones. Businesses need to accelerate and simplify complex processes in customer journeys, where customers transact. They need **solutions that empower them to deliver the instant digital experiences consumers demand** by eliminating the ping-pong of paperwork, endless emails and redundant phone calls that plague sales and service processes.”

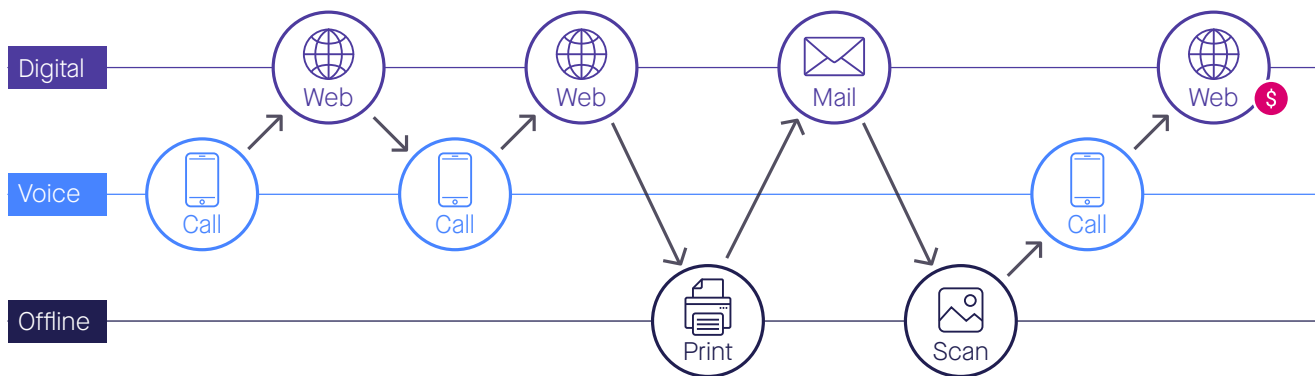


ZVIKI BEN-ISHAY,
CO-FOUNDER AND CEO, LIGHTICO

The Strategic Imperative: Why Your Business Needs a Digital Transformation Solution

Today's businesses must digitize and streamline customer interactions to compete in the face of increasing regulations and higher customer expectations. Digital transformation will enable your business to complete more customer-facing processes, faster and in compliance. This guide will provide the information you need to choose the right digital transformation solution for your business.

Today's Journeys



Digitally Transformed Journeys

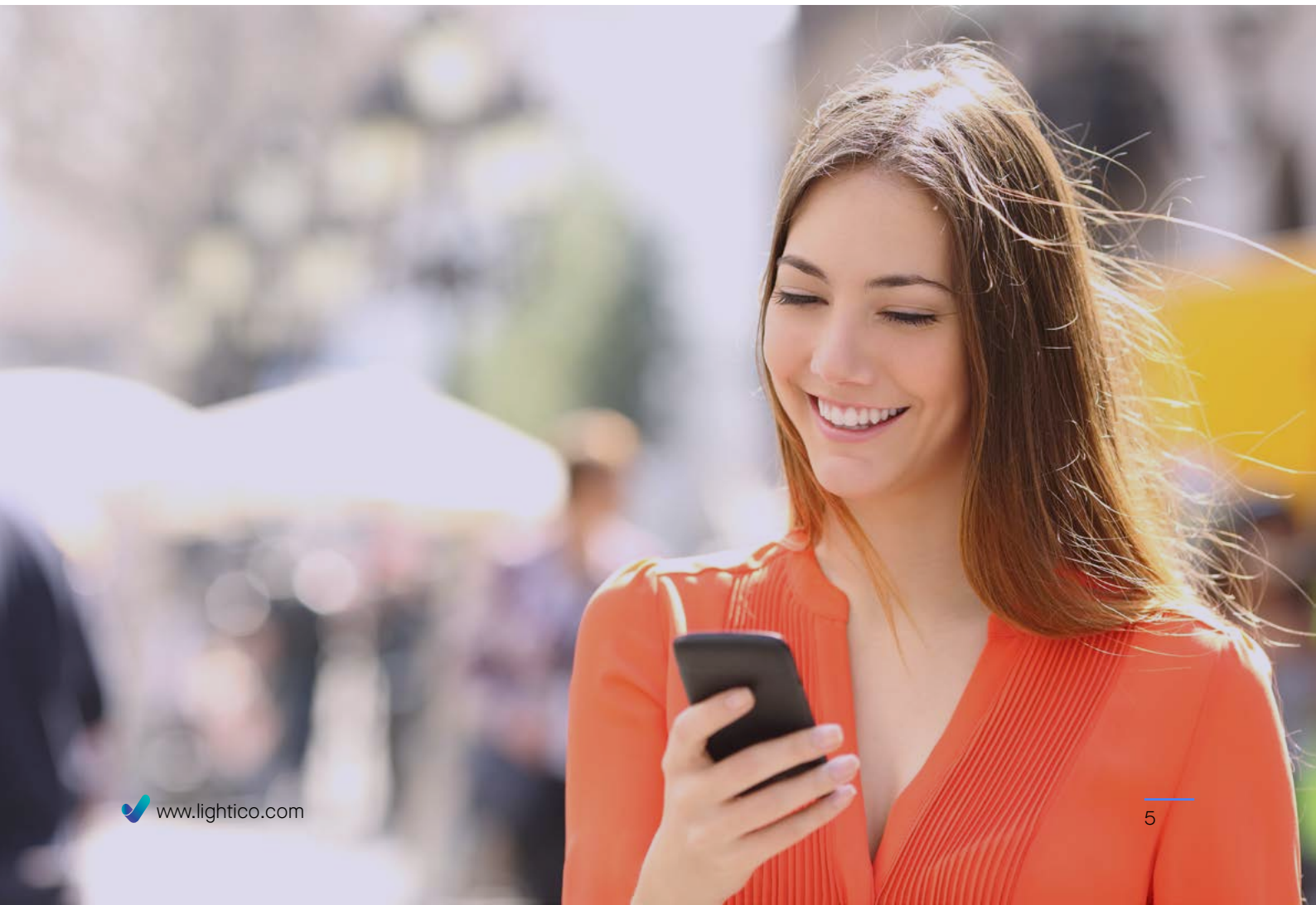


Companies need to replace clunky, costly and frustrating customer-facing business processes across the whole scope of the customer journey. Instead of form filling, signing, document collection, ID verification and payment processing, companies need digitized, effortless customer interactions, that customers can complete anywhere. Businesses need to be able to instantly collect required customer information via eForms, eSignatures, documents, photos, eConsent, payments and to verify ID anywhere the customer is, in a secure, simple way.

Executive Summary

Customers expect business transactions to be effortless and anywhere. While many businesses have taken a first step towards digitization, many of these initiatives have failed to keep up with customers evolving demands. The way businesses in document-heavy industries have evolved is no longer enough to serve businesses and their impatient, mobile customers.

Today, customers want entire transactions managed effortlessly from anywhere. They want instant. They need anywhere. They expect clarity and are easily defeated and deflated. They expect all components - signatures, forms, images, ID, documents, payments - to be easy and instant to complete. First-generation digitization solutions cannot deliver this. And that reflects in low - and dropping - completion rates. Today, with less than 50% of consumer transactions completed, it is a business imperative to understand and address the issues that are hurting completion rates. Only a next-generation digital document solution can provide the customer-centric solution needed to manage the entire end-to-end transaction. Only simplifying, contextualizing, mobilizing and guiding entire customer processes, can businesses complete more processes, faster.



What to Look for in a Digital Transformation Solution

As regulated businesses look to deliver efficiencies of digital transformation, they need to consider the new expectations and functionality available to them. This guide lays out 10 core criteria for evaluating solution readiness.



Effortless

What to look for:

An intuitive customer interface makes it easy to complete multiple sales or service processes.

Why it's important:

Customers expect their business interactions to be intuitive and effortless. Friction causes frustration and delays completion. Businesses will benefit from making it easy for customers to complete any process to maximize completion rates and provide a great customer experience.



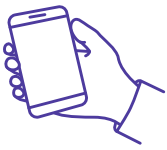
Instant

What to look for:

Real-time text message direct to customers cell phone to complete all required processes. (No clumsy email, inbox overload, portal login, or app)

Why it's important:

Customers are eager to complete tasks instantly - they have gotten used to the world of buying at a click of a button on their cell phones - the Amazon effect. Revisiting them later on, expecting them to wait for emails, download heavy apps, then chase for responses breeds doubt and stymies completion rates.



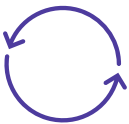
Mobile

What to look for:

All customer-facing processes can be completed with simple finger swipes, on their cell phone from wherever the customer is.

Why it's important:

Customer attention is scarce. Customers expect to be able to purchase anything from anywhere - why should your product be different? It is critical to make it easy to be successful - do not have your customers reliant on outdated and cumbersome equipment like printers, scanners, desktop PCs and even fax machines.



Completes Entire Processes

What to look for:

Supports all customer-facing processes such as collecting signatures, forms, consent documents, payments and verifying ID.

Why it's important:

Instead of using multiple tools to complete each part of the sales or service cycle - one solution enables businesses to complete the full customer journey quickly and easily in one channel, accelerating processes and reducing frustration.



Digital & Smart

What to look for:

Streamlines multiple customer-facing processes into automated and dynamic workflows resulting in a smooth, error-free, compliant journey for both businesses and their customers.

Why it's important:

Manual processes are often time-consuming and error-prone, leaving your business at risk of non-compliance. Digital solutions accelerate processes, eliminate legal risk, rekeying and human error by streamlining all tasks within customer-facing processes.



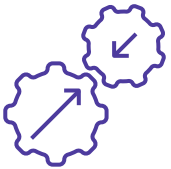
Guided & Personal

What to look for:

Customers can be actively guided by an agent to correctly complete tasks such as form filling, approving terms and ID verification, even while on a call.

Why it's important:

Customers often find certain tasks frustrating, confusing or high risk. By actively guiding them through processes in-call, customers are more inclined to complete tasks correctly, in real-time.



Integrated Workflows

What to look for:

Out-of-the-box integrations and open APIs that plug into your existing business environment (CRM, Agent Toolbars, LOS etc) for easy adoption.

Why it's important:

Your team can add business-critical functionality from within their existing work environments, enabling them to ramp up quickly and easily.



Every Touchpoint

What to look for:

A solution that can be plugged into any channel to drive efficiency in processes across all customer touchpoints in your contact centers, portals, apps or IVR's.

Why it's important:

SaaS solutions can be quickly deployed across business groups and customer touchpoints so they impact entire customer-facing business processes. This makes it easy for any customer to complete any task from any touchpoint, whether they are on the phone, in-store or on your website.



Compliant, Secure & Business Ready

What to look for:

Meets worldwide industry standards and complies with all necessary regulations including; ISO270001, PCI DSS, eSign act, HIPAA [and more](#).

Why it's important:

Businesses need a trusted partner with the highest security standards to manage their data and workflows. They need to know that their software partner is experienced and certified to work in the most info-sec environments.



Built for Scale

What to look for:

A cloud-based software solution (SaaS) which can be easily implemented and handle millions of customer interactions without slowing down or causing technical issues.

Why it's important:

Implementation of digital transformation should be smooth and easy so that your business can get up and running immediately and start providing all of your customers with the seamless, effortless experience that they deserve.

Conclusion

To sell and service today's demanding customers, businesses must digitize and streamline customer interactions. Often customers are required to complete forms, sign forms, provide ID and supporting documents, pay and more. But with customers are on the go and with no patience for clunky processes, both businesses, agents and their customers suffer. It is clear why digital transformation is a key executive directive. Thankfully, robust digital customer-facing digital solutions are rewarding businesses with higher completion rates, accelerated sales, better customer experience and simplified compliance.





Learn more about Digitally Transforming
Your Customer Journeys.

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