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WalkMe Special Edition

Digital Adoption

for
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Learn about
digital adoption

Understand the implications
of poor adoption

Drive value with a digital
adoption platform

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you by

walk **me**

Steve Kaelble

About WalkMe

WalkMe's cloud-based digital adoption platform enables organizations to measure, drive, and act to ultimately accelerate their digital transformations and better realize the value of their software investments. Its code-free platform leverages a proprietary technology to provide visibility to an organization's Chief Information Officer and business leaders, while improving user experience, productivity, and efficiency for employees and customers. Alongside walkthroughs and third-party integration capabilities, WalkMe's platform can be customized to fit an organization's needs.



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Digital Adoption For Dummies® , WalkMe Special Edition

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Introduction

Digital transformation is essential for the long-term success, and even survival, of your organization. Every day there's a revolutionary new digital technology that can help your employees be more productive or help your customers be more satisfied. You can't afford not to keep up with the possibilities these new applications present — after all, your competitors have access to the same platforms.

But how often have you acquired a new application and been underwhelmed by the results? If you're like most business or IT leaders, this situation is common. As much as everyone wants to achieve digital transformation, surveys of chief information officers (CIOs) reveal that few people think they're there yet.

This challenge isn't the fault of the applications. Change is happening too quickly, solutions are too numerous, and your team can't absorb them all well enough to make good use of them. Each has its own interface, its own instructions, and its own requirements, and applications seem to be changing all the time.

What if your business and technology leaders could gain full visibility into this increasingly disparate tech stack to see what's working, what's not, what's underutilized, what has value yet to be unlocked? What if you had an organization-wide approach? What if a common interface walked users through these many different systems, reducing friction and making it downright easy to adopt them all? This book helps answer those questions.

About This Book

Digital Adoption For Dummies, WalkMe Special Edition, dives into how you can help your employees and customers adopt every one of the technologies you're putting in front of them. You discover that an astounding boost in your return on investment (ROI) could be just around the corner. This book highlights what's causing anemic digital adoption right now, how organizations have tried to solve the problem, and why yesterday's solutions aren't keeping up. It paints a picture of what the future state ought to look like and how that can make all the difference for your organization.

In this book, you also find out about how WalkMe's Digital Adoption Platform (DAP) brings that better approach to life. And it offers real-world case studies of how digital adoption has paid healthy dividends.

Foolish Assumptions

In writing this book, I made some assumptions about you:

- » You're a leader at a forward-thinking organization with a future reliant on adopting digital tools and processes.
- » You may be a CIO or on the business side, but either way you have a keen interest in making digital tools succeed.
- » You're looking for a quick introduction to both the problems thwarting digital adoption and the most powerful solutions.

Icons Used in This Book

As you peruse this book, you see icons in the margins. They're not there just to be pretty. Here's what they mean.



REMEMBER

This book isn't lengthy, but if you're reading in a hurry, don't miss the takeaways in the paragraphs next to the Remember icon.



TIP

I aim to provide some actionable insights, and you find them next to the Tip icon.



WARNING

Digital transformation can go wrong in many ways, and the Warning icon points to things to watch out for.

Beyond the Book

If you reach the end of the book and are eager to learn more, satisfy your curiosity by visiting www.walkme.com. You can find out much more about digital adoption, why it's vital, what tools help, and how organizations have achieved digital adoption success.

- » Dealing with multiple disparate systems
- » Confronting a technological monster
- » Dreaming of a better way forward

Chapter **1**

Operating in a Fragmented Environment

Digital transformation is, without question, a key to current and future business success. Adopting the latest software technologies opens the door to exponentially higher productivity, to new consumer connections, to fewer headaches on the part of both customers and employees. But digital transformation is also, in and of itself, a big headache.

This chapter spells out just how troublesome it is when your organization implements one fantastic new tool after another, without a good way to help them all fit together. It explores how your tech stack can become a horror story. And like many good horror stories, the chapter ends with a ray of hope for better days ahead.

Navigating Multiple Systems

What your organization can achieve through digital transformation is almost unbelievable, and while you can transform in many ways, you're likely to spend the most time and money tapping into the power of software. Applications and systems exist for solving virtually every challenge you can think of — plus a lot of challenges you may not even realize you have. The digital revolution is impacting us in every aspect with regard to how we live, consume, work, do business, and communicate.



REMEMBER

Organizations are responding to the promises of software technologies by opening up their checkbooks in a big way. One International Data Corporation (IDC) estimate predicts that by as early as 2023, spending on digital transformation will have reached \$2.3 trillion. And one survey from Constellation Research found digital transformation to be the top budget priority for organizations — even higher than cybersecurity.

In this landscape, your employees have so many potential new tools at their fingertips to make their work lives easier and more productive. Empowering your employees allows them to better serve your customers, which leads to an improved overall customer experience. And that, in turn, yields higher revenues and return on investment (ROI).

Just as important, digital transformation offers your customers new ways to do business with your organization — and again, do even *more* business with your organization.



WARNING

That's the promise but not always the reality. Take a look at productivity trends and you'll see that growth has slowed to a crawl in the past decade. A majority of organizations may fail to achieve the outcomes they expected through digital transformation. A Boston Consulting Group report titled "Flipping the Odds of Digital Transformation Success" stated that 70 percent of digital transformations fall short of their objectives.

So, why is it so difficult to get all these miracle applications and systems to bear the fruit you were expecting? Have your investments in software really been worth the money? The truth is, you may not be in a good position to really answer those questions because your employees and customers are quite likely not fully using these investments. And that's not necessarily their fault.

It's just that they're human. As humans, they can only adapt to change so quickly, yet the pace of change is dynamic.

Just think of a sales representative as an example. Your organization has probably adopted quite a few new software technologies in recent years to help your sales reps succeed:

- » They probably use customer relationship management (CRM) and other tools to manage interactions with existing and potential customers. Could be Salesforce, maybe SAP or Oracle, perhaps LinkedIn, or could be Outreach.
- » They may have access to a comprehensive knowledge base filled with vital information about your products and services.
- » Applications such as DealHub, Confluence, and Grammarly help automate the quoting and discount process.
- » Additional systems such as Clari help generate more accurate forecasting.
- » You've digitized the legal processes with systems that create contracts that can then be e-signed. Think of such names as DocuSign and Adobe Sign.
- » Perhaps they're tapping into NetSuite or SAP Concur for invoicing.
- » And like all of your other employees, they also are using multiple internal systems that manage human resources (HR) needs, scheduling, learning and onboarding, recruiting, performance, payroll, benefits, communication, and that kind of thing. The vendors are seemingly endless, including ADP, SuccessFactors, Taleo, Kronos, ServiceNow, and many more.



REMEMBER

That's a whole lot of systems and platforms and applications — all of which are incredibly useful and powerful. The average Organization, in fact, has 300 or more mission-critical applications. These applications change and upgrade continuously, with cloud updates pushed by vendors. And on top of all that, your team is continuously improving internal business processes. There are new and better ways to do everything, and a good organization is always exploring improvements.

But face it, that's a whole lot of constant change. Your sales reps and the rest of your team have multiple systems to navigate, and every time they finally get used to a system, something about it changes. How can regular humans keep up with all that without making a lot of errors and, perhaps, pulling their hair out?

How can you truly judge the return on your software investment if your employees are so overwhelmed that they really aren't able to use the technology fully because you're running so many different systems? Sure, you can measure ROI, but you may not be happy with the number you come up with.

Battling the Frankenstack



WARNING

Users are overwhelmed. Whether they're employees or customers, there's just too much going on in the digital transformation world to keep up with the pace. But users aren't the only ones overwhelmed; organizations are, too, because they have to deal with a constantly growing tech stack.

Layered above your digital assets are the departments that are increasingly taking ownership of the digital strategy. On top of the tech stack are all the carefully tailored workflows and business processes that drive the business and are in a state of continual improvement. And on top of all that are the overwhelmed users.

Seriously, if you were starting from scratch, would you design your tech stack this way? Would you purposefully go out and obtain so many disparate, fragmented enterprise applications?

With a tech stack marked by scores of different applications and the generally decentralized nature of IT systems, it's incredibly challenging. Throw in all the different vendor relationships, the choices that you must make between legacy applications and new cloud alternatives, and the fact that the increasingly Software-as-a-Service (SaaS) world removes your control over upgrades and timing. That just makes matters all the more challenging.

Whew! Your IT experts are bound to be just as exhausted as your users. They're looking at a tech stack that's more like a black box. Or perhaps an even better image pays homage to Mary Shelley's classic *Frankenstein* from two centuries ago, in which a scientist

creates a being from many disparate parts. Though the creation was supposed to be beautiful, that's not how things turned out. In the case of today's "Frankenstack," the beautiful software technology you've implemented in order to overcome challenges has, in fact, become the challenge.

Exploring a New Approach

Employees have struggled to fully adopt new technologies for years. But the problem is only getting worse. In fact, the move toward hybrid environments, or fully work-from-anywhere situations, is also adding to the challenge. And thanks to the Covid-19 pandemic, organizations are more hybrid than ever, in many cases permanently.



REMEMBER

What your organization needs is a new approach to easing the burden and fully leveraging your technology's capabilities. Chapter 2 looks at some of the ways organizations are dealing with this issue now, and Chapter 3 sets up the dream of a better way.

Just keep in mind that the big picture goes far beyond adopting some applications more successfully. The ultimate aim is true transformation in a way that not only gets full value out of these technologies but also really integrates them into your ever-improving business processes and ever-more-fruitful customer connections.

The best approach for traveling down this path would be frictionless, effortless, even elegant. It would be that way for your employees and customers alike. It would be that way regardless of the tool they're using or the platform on which their technologies live. That better approach would result in happier employees and a much higher rate of task completion. In fact, it would pave the way for much more robust automation of the tasks that your employees weren't really enjoying, anyway.



REMEMBER

For management, the better approach would start with data derived from better visibility into the tech stack. Data about who is or isn't using various applications, how they're using the applications — as well as what troubles they might be having — would yield powerful insights. Those insights would then guide actions to create better user experiences and drive greater technology adoption. And in this better approach, a single platform

would handle all the data monitoring, insight generating, and action planning.

Management would be blessed with a wide range of valuable metrics — related to onboarding, ticket deflection, acceleration of sales, customer retention, and software utilization, to name just a few. To that last point, management really needs to know not only if employees are logging in but also how they're using specific software, what challenges they're having, and whether they're using it to its fullest potential.

From an HR perspective, a better approach would offer new ways to interact with the workforce and to get them to fully benefit from those HR applications that seem to change constantly. It would ease the burdens of onboarding, scheduling, training, and payroll — and the increasing challenge of dealing with a widely dispersed workforce.

An improved approach can create positive revenue impacts, as well. Automating CRM best practices, for example, will boost sales execution. Personalized, task-specific training will help bring salespeople up to speed so they can generate revenue more quickly. Reducing data-entry mistakes will improve the accuracy of forecasting.



REMEMBER

And from the perspective of the IT department, a better approach would make life easier in multiple ways. Given the fact that IT spends a lot of time troubleshooting and problem-solving, any improvement in adoption would mean less time and effort spent helping users to successfully get up to speed.

A better approach would also help IT really pinpoint what the pain points are, in order to better target efforts at resolution. That would translate into more positive results while also driving some of the costs out of IT. And that brings the vision around to the impact on costs and revenues. The better approach to resolving this problem would ultimately boost the return on your organization's technology investment.



REMEMBER

Despite a shockingly high failure rate when it comes to digital transformation, you can easily reframe that bleak picture because every failure is an opportunity for improvement. If complexity is spoiling a lot of the fruit of technology investments, that means there's a whole lot of room for improving your ROI.

IN THIS CHAPTER

- » Understanding the big-picture problem
- » Exploring your own fixes
- » Calling in the experts
- » Ending up with multiple answers

Chapter 2

Piecing Together Solutions

The challenge of digital transformation isn't a new issue (see Chapter 1 for more info). Adoption has been a sore spot for as long as there has been technology to adopt. The problem today involves both the complexity of the software being adopted and the simple fact that your teams are being asked to tap into so many different systems to get their jobs done.

This chapter explores some of the ways organizations have been approaching the challenge of digital adoption up until now. It points out that the problem in the past has been incremental enough that many organizations have missed the overarching challenge. This chapter also examines the drive to find do-it-yourself solutions and why that doesn't address the big picture. It discusses the benefits of getting expert help. And it outlines the reality that even the best existing approaches tend to be more piecemeal than transformational.

Missing the Problem

It's such an age-old observation that it may seem almost trite, but the first step toward solving any problem is recognizing that you do, in fact, have a problem. With regard to the challenges posed by digital transformation, aren't the problems obvious?



REMEMBER

Well, not necessarily. That may be due in part to the fact that software adoption issues tend to develop gradually, over an extended period of time. You're not necessarily hit over the head with a major disaster, but instead, you encounter a pain point here and then a pain point there — each one an annoyance that falls short of catastrophe.

So, you address the pain point here. And then you create a fix for the pain point there. Each fix seems to help, but it may not be immediately obvious that you're weaving an intricate web of fixes, rather than an integrated solution.

Of course, this dynamic is made all the more pernicious by the very problem of your multiple, disparate applications. You've got a lot of fixes out there, but if you don't take a step back, you may miss the most important insight of all — digital transformation is a big-picture problem that deserves a big-picture solution. If your organization doesn't have a structured digital adoption strategy, with broad visibility along with a definition for what "good" looks like, you're going in blind.

Taking a DIY Approach

The approaches of the past have tended to be piecemeal, addressing one problem at a time. These fixes often are do-it-yourself (DIY) solutions, using whatever tools might be at-hand. Training is, of course, an old standby for ensuring successful adoption. And there's nothing wrong with training — it seems fairly intuitive that when you're adopting new systems or processes, your team may need some formal instruction.



REMEMBER

That's far easier said than done, though. Is it feasible to pull associates who are busy serving customers, possibly in a hybrid environment, away from their tasks for an extended session of didactic instruction? Your learning management system (LMS) may give you a boost, but the LMS needs plenty of care and feeding, too.

Along those lines are other forms of instructional communication, such as tips-and-tricks documents. But again, does your team really have the bandwidth to absorb all that information about multiple systems in that format?

The answer is “no.” Research shared by The Learning Guild confirms what we all know through our own experiences: Our brains are terribly forgetful. Within an hour of learning something, we forget roughly half of what we learned. Within a day, we’ve forgotten on average 70 percent of the new information. Within a week, 90 percent of what went in one ear has gone out the other.

The biggest questions in this regard are did you hire your employees to master systems or to get their jobs done? And do you want a sales team composed of people who are all customer relationship management (CRM) system experts, or experts at selling? Training on multiple systems can be a waste of time, when what you really need is for your employees to simply *know* what they need to know in order to succeed at their primary tasks.

Beyond training, organizations may adopt many other DIY work-arounds, from lower-tech approaches that try to stitch systems together, to individualized efforts at automating tasks, to more complex extract, transform, load (ETL) jobs. Approaches such as these can certainly work, one-by-one, but they don’t address the big-picture problem.

Calling In the Systems Integrators

Many organizations that try to resolve digital adoption issues on their own ultimately reach the limits of what they can fix on a DIY basis. Systems integrators and software vendors may be the next place to turn for answers, and indeed, they can be helpful.



REMEMBER

Global systems integrators, in fact, can bring in new perspectives, ideas, and that big-picture view that organizations may be missing. Those systems integrators that focus on the right metrics, aim for the right outcomes, and bring along the right tools can definitely help make transformation a success. And they know that adoption is the ultimate key.



TIP

Consider whether you're building integrated solutions or if you're merely gluing existing apps together. Will you end up with a truly big-picture answer or bandages and glueware linking existing applications but leaving you with still disparate approaches? Will you be tapping into your LMS, or perhaps building in guidance that pops up while the user is in the application itself? Determining the answers to these questions is a good step along the right path, but those answers may not get you to the ultimate goal of a more unified enterprise user experience (UX).

A global systems integrator can help you to reach that ultimate end goal, through the creation of transformational processes and implementation of powerful technologies. Because the success of any such solution is inextricably linked to adoption, expect these great ideas to be paired with powerful ideas for boosting the speed and rate of adoption.

Cobbling Together a Solution

The approaches your organization has used so far on your digital transformation journey aren't necessarily bad ideas. You haven't been wrong to pursue DIY fixes, implement software solutions, and call in third-party consultants. Each one of these answers is a start and will make some improvement.



REMEMBER

Even more to the point, it takes a lot of learning to effectively benefit from these fixes, a lot of effort to apply these workarounds — and potentially the writing of a lot of code to create them. Your end result may be a healthy step up, but is a step up really enough?



REMEMBER

Industry studies and surveys reveal that the digital adoption gap isn't small — as I mention in Chapter 1, some 70 percent of digital transformations don't live up to their expectations. Small steps will start you down the path in an incremental way, but there's still a long way to go to reach the destination.

IN THIS CHAPTER

- » Thinking in big-picture terms
- » Figuring out what the real problems are
- » Helping employees be more productive
- » Improving user experiences
- » Realizing the full potential of your investments
- » Equipping your organization for the unknown

Chapter 3

Rethinking the Whole Approach

The increasingly fast pace of change, and the potential for unforeseen disruptions, mean your organization shouldn't take digital adoption for granted. You can't buy your way toward certainty and success by simply acquiring new technologies and expecting them to make miracles happen.

This chapter explores how a brand-new, revolutionary approach to digital transformation might look and how it would make a difference. It discusses how a big-picture, strategic view helps uncover where the real problems and opportunities lie. It explores how better adoption means more productive employees and more positive user experiences. And it outlines how a new approach strengthens your organization for the long-term.

Painting the Strategic Big Picture

The pace of change is more dizzying than ever, and many factors continue to accelerate that pace and increase the reliance on digital transformation. By the time users get up-to-speed on one new or updated application, several more applications are waiting to be adopted. A typical organization now employs scores, if not hundreds, of different technological solutions.

Given that, today's transformation simply can't be piecemeal, adopted in a one-by-one fashion. Your organization must work to operate in a more holistic and strategic manner. Your new future should fully integrate enterprise technology and create a more seamless, simple user experience.



TIP

In rethinking the whole approach, consider the need for much more unified visibility, allowing the chief information officer (CIO) as well as business leaders to see what's happening across the software stack. True digital transformation requires data-driven insights with a strategic perspective and an eye toward business processes, not just individual software applications.

Looking at the big picture should include an understanding of software usage and user experiences across all business processes. This big-picture approach must not be stymied by silo walls because employees and customers alike have user experiences that span multiple departments and the applications within those departments.

The frictionless experience that results from this type of view is key to employee productivity, happiness, and retention. It's also key to removing customer pain points that can cost you sales — and improving the customer experience gets you closer to the holy grail of creating a passionate base of customers-turned-advocates for your business.



REMEMBER

A strategic view gives business leaders and CIOs insights into whether the organization is getting the most return on all of its technology investments. And it's about delivering that fruitful user experience that truly moves the organization forward toward meeting strategic objectives.

Tracking Down What's Inhibiting Adoption

A strategic view of your tech stack can also shine new light on your organization's technological and business-process problems. It connects the dots, so your IT and business leaders can identify issues and bottlenecks that are more organizational in nature, not just glitches in the adoption of a particular application.



REMEMBER

That's a truly powerful capability, one that you don't get without broad integration and holistic visibility into the software stack. Instead of one-off problem-solving, you're able to watch the behavior of users within systems and explore how you can minimize friction between your employees and your processes.

Better visibility means you're not just waiting for frustrated users to call for tech support. You're actually seeing in real time what's working in the tech stack and what isn't, finding out where users are getting hung up. It's not just about fixing obvious problems, but rather looking for slowdowns and unnecessary steps, or spotting behaviors that can lead to errors that will then need to be corrected.

When you can identify real problems, you can more quickly move toward real solutions. And because you're doing this in a more holistic way, you can focus the most energy on the problems that are having the biggest negative impact. You're not just looking for low-hanging fruit, or the fruit that's being thrown at you in frustration — you can look for the most valuable fruit on the tree. Additionally, you can't manage what you can't measure, and you can't improve what you can't manage.

Increasing Employee Productivity



REMEMBER

Your new approach moves on to not just solving those problems but really redefining what it means to be productive. A comprehensive digital adoption approach can result in applications that are more easily embraced, with processes that are more efficient and with fewer steps to take and buttons to push. It creates more streamlined processes, which can free up time for tasks that are more meaningful to the user and more profitable to the organization.

It can also simply help them get more done. If your support employees are more productive, for example, they can handle more support tickets. Customers spend less time waiting, and their problems get resolved more quickly. Customer satisfaction goes up, along with net promoter scores, and higher net promoter scores can drive more business.

Removing friction also makes life easier for those handling IT support and help desk duties. Many of their calls typically come from users who can't quite figure out how to do whatever it is they're trying to do because they just don't know the platform well enough. Improve digital adoption and you can expect to cut those calls in half.

Creating a Better User Experience



REMEMBER

Better digital adoption means your employees can help themselves more often through self-service and a broader understanding of what they're doing. You're not just reducing the burden on the help desk but also reducing employee confusion overall and increasing their knowledge to transform them into more valuable and satisfied employees.

Yesterday's approaches of videos, tutorials, presentations, or instructor-led training aren't really up to the task anymore. A robust, big-picture approach to digital adoption should include alternatives that increase onboarding efficiency and allow employees to intuitively get things done without being held up by a steep learning curve. That increases satisfaction with the user experience, not to mention the experience of the organization as a whole.



TIP

When you're considering the user experience, you can't forget those users known as customers. Their satisfaction also goes up when their direct online experience is more successful and less plagued by friction. Give them a better experience with your mobile application, and you'll reap the rewards in retention and advocacy, which is healthy for the bottom line.

Unlocking the Full Potential of Your Business

Consider a bit more about how your new approach to digital adoption can boost the potential of your business. Daily improving your employees' productivity has obvious benefits, but it's more than just a matter of being able to work more efficiently.

Also adding value is the fact that greater adoption means your employees spend less time learning how to use a system or how to employ a workaround and more time actually using it. They're putting their energy into doing the actual work your organization hired them to do, not just getting ready to do that work.

Even more important, when you've achieved digital transformation, your team is bringing to bear all the power of the software you've invested in, not just a fraction of the potential benefit. Those are great tools you bought, but what if your team is leaving some of their capabilities unused?

A better digital adoption approach boosts your data quality by helping employees enter more accurate information into your systems. Greater data hygiene means better predictability and more accurate forecasting.



TIP

You also tap into much more insightful analytics for squeezing more value out of your technology investments. Seek out real-time ways to find out not only which technology capabilities are underutilized, but also which of your employees are underutilizing them the most. That helps you know where to target your attention.

Strengthening the Organization

Recent years have put virtually every organization through tremendous tests. Many have rethought their entire way of operating, with moves to hybrid or even fully virtual workplaces. In the past, it might have been hard to imagine adopting major new platforms when workers are rarely under one roof at the same time. But in today's reality they're not just in different offices — they may even be on different continents. Positive change isn't

going to wait for some old version of “normal” to return. It’s not coming back.



REMEMBER

The most successful organizations are always the ones that keep on transforming even in the face of disruptive change. With the work-from-anywhere concept on the rise in recent years, many companies put adoption solutions in place that work as well in the home office as in the traditional work environment. For example, when the COVID-19 pandemic helped turn work-from-anywhere into the new normal, these companies thrived by easily onboarding new cloud technologies, collaborative solutions, and other advances that helped their dispersed workforces prosper even as they sat in separate spare bedrooms rather than adjacent cubicles.

Fact is, disruptive change isn’t by definition a bad thing at all. The whole reason your organization has acquired all this technology is to change for the better and disrupt your markets. Forward-thinking companies have recognized they need to rethink how they approach digital transformation. It’s the best way to harness the change that’s inevitable and be ready to face whatever challenges lie ahead — and greatly strengthen the organization.

IN THIS CHAPTER

- » Watching the tech stack closely
- » Introducing WalkMe's Digital Adoption Platform
- » Onboarding employees and improving their experience

Chapter 4

Exploring the WalkMe Solution

This chapter walks through the technology that pioneered an exciting new vision for digital transformation. WalkMe's Digital Adoption Platform (DAP), also referred to as just WalkMe in this chapter, makes life easier for everyone dealing with digital tools:

- » For **CIOs and business leaders**, it offers visibility into the enterprise tech stack, including software usage and user experiences across business processes, with analytics to help drive business outcomes horizontally across the organization.
- » For **users**, it's always at the ready with information and assistance — answering questions, correcting errors, automating tasks, and completing tasks within applications just by asking the user simple questions. It improves productivity and encourages greater data accuracy. It optimizes software usage with business process workflows that help employees get the full benefit of your software applications.

» For **customers**, it improves engagement by simplifying the user experience, which increases customer retention, grows upsell opportunities, and reduces customer support calls.



REMEMBER

WalkMe is application-agnostic. It steps in and works with any application, and from users' perspectives, it works in the same way no matter what they're trying to do. WalkMe is a unified enterprise user interface for interacting with everything. It's not that other applications have bad user interfaces — it's just that there are so many to learn. With WalkMe, you no longer have a collection of multiple user experiences; you have an enterprise user experience.

Gaining Visibility into the Tech Stack

WalkMe's DAP offers visibility and insights throughout the enterprise tech stack with Digital Experience Analytics. Through data surfaced in analytics dashboards, you gain the ability to closely follow user behavior in the system. You can understand where your employees have problems and then focus resources on the right areas that need attention.



TIP

When you spot a pain point, use WalkMe's no-code editor to create solutions. Machine learning makes this back-end work user-friendly, so you don't have to be technical to create these solutions.

Problem-solving is just the beginning. Real-time analytics, shown in Figure 4-1, reveal aspects of your applications that aren't being used to their full potential, such as salespeople who aren't getting the most out of what Salesforce can help them achieve. WalkMe can then pay attention within context and remind users of missed steps or opportunities.

With these analytics, you can build better business processes, removing roadblocks and ensuring that you get the most from your investment. If you're not getting the value you expected, you not only find out the bad news but also learn what to do about it.

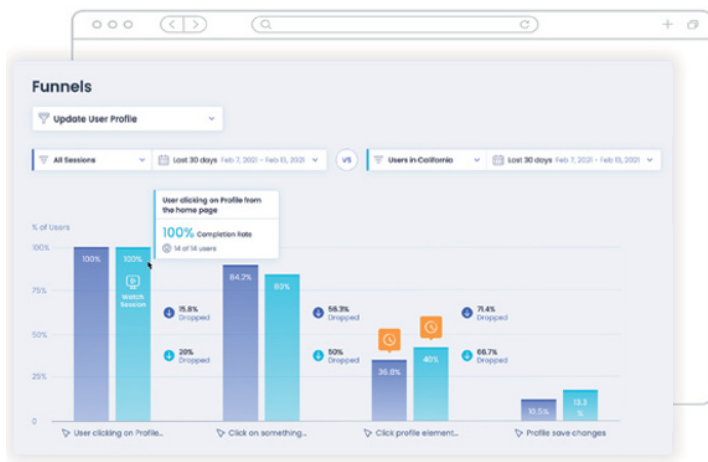


FIGURE 4-1:
Gaining
visibility
through
analytics.

Getting to Know WalkMe's DAP

The key from the perspective of users is WalkMe's DAP. With WalkMe implemented, users see a “Me” button on their computer screens. Click that button to open a single pane that lets you know the things you can accomplish. It includes a search box powered by enterprise AI that can find information, answer questions, and launch into getting almost anything done.



REMEMBER

Right off the bat, employees can see a list of the top ten things other employees need help with. Opening a support ticket is a common one. Requesting time off, setting up a printer, starting a new purchase, getting IT review — any kind of task that happens regularly can show up on this list. When an employee clicks on one of those things (or the result of a search), WalkMe doesn't just open up a knowledge base article telling how to handle a task. The interface can provide step-by-step guidance, showing exactly how to get the job done as the user is actually doing it, with screenshots as needed, and tailored, relevant information. See Figure 4-2 to see how it can work.

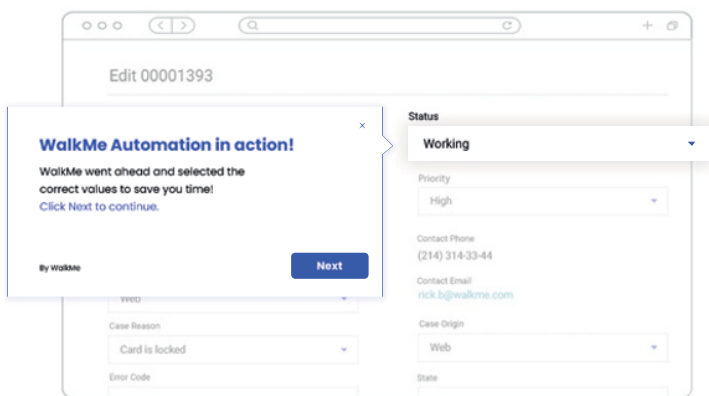


FIGURE 4-2:
Walking employees through common tasks.

WalkMe keeps an eye on the process, too, and if the user is doing something wrong, WalkMe stops and corrects the error. Its capabilities are context-based — even if a user doesn't click for help, WalkMe can spot an error and step in to assist in real time. Imagine how powerful it is to not just fix errors later but also keep them from happening in the first place.

Other kinds of in-application guidance are available, too. For example, a WalkMe implementation also drops little question marks in relevant places on the screen. Hover over a question mark, and you get tips related to that topic.



REMEMBER

Going beyond the basics of this interface, WalkMe's ActionBot automates real actions. ActionBot is a chat interface, using natural language to help users complete tasks. ActionBot can answer questions, but it also automates common requests. For example, take the task of requesting time off. Employees simply tell ActionBot what they want to do, it asks what dates the employee has in mind and where the employee works, then handles the details on the back end. It goes straight to the appropriate HR application, drops in the information it has gathered, and completes the task. All the user had to do was have a chat with the bot.

The same kind of thing happens when your salespeople want to interact with their database of leads in their CRM. They can just converse with ActionBot and tell it that they want to create or update a lead, make notes in the lead, set up a meeting, and so on. The bot goes into the CRM and gets the job done.

Meanwhile, your organization likely has no shortage of information. You may have vast stores of helpful knowledge located in many different places — maybe a customer-service knowledge base, another with a collection of technical support details, articles on the intranet, handbooks with HR information, and so on.



REMEMBER

But what good is a vast library if users don't know what's in it or how to find what they're looking for? The enterprise AI search box that's part of WalkMe, shown in Figure 4-3, interfaces with any knowledge base, wherever it lives. Its machine learning capabilities understand the role of the person making an inquiry and knows what kinds of things peers try to do, which allows for better results.

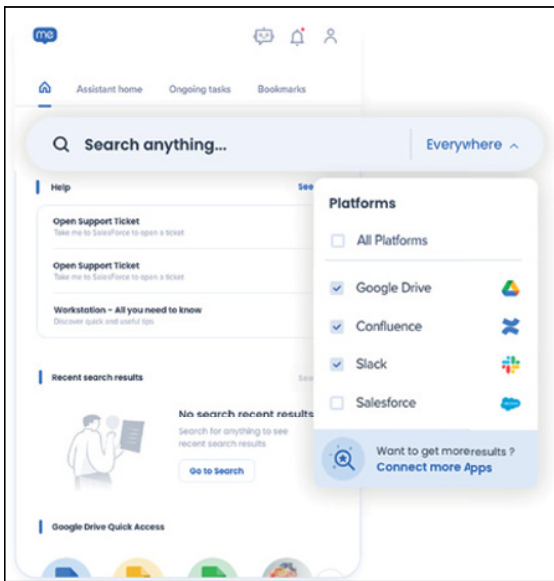


FIGURE 4-3: Searching with the power of AI.

Better Experiences, from Onboarding Forward

WalkMe's DAP can make a difference in many different parts of the onboarding process. A big part is more efficient adoption of all the technologies that go along with the job, but it can improve the situation in other ways, too.

Here's a scenario to help illustrate. You have a new junior sales engineer starting next week. She arrives on Day 1, logs in, and WalkMe is ready to guide her through everything she needs to know. There's a to-do list to check off, including things she needs to learn, mapped out by day or by week. That learning process can tap into the LMS and also include WalkMe guidance on actual processes and applications. Your new person can learn by doing and get up to speed much more quickly. She can become familiar with what she needs for her specific role without being bogged down by having to train on all the nuances of a bunch of individual applications.

It's an efficient way to steer new employees through their early days and can happen effectively even if they're beginning as a work-from-anywhere employee. And not only can it walk new hires through their work processes, but also it helps them effortlessly navigate all the various HR hoops, through which every new employee must jump. That level of segmentation and customization can continue well past onboarding. Existing employees easily access the most pertinent information and guidance for their work.



TIP

The pace of change is more rapid than ever, and communicating changes is vital. WalkMe is capable of sharing in-application announcements that address changes and mitigate challenges. It can also push out notifications, called *Shout Outs*, on the desktop itself, regarding application changes, planned downtimes, or any other significant announcement such as human resources initiatives or new product introductions.

WalkMe can integrate with the kinds of employee communication platforms that are already in use, whether your team is in an office or spread out across the country. Through WalkMe, you can ensure employees are using the right communication channels and also help managers gain a better understanding of system migration.



REMEMBER

With WalkMe, your employee experience becomes much more user-friendly, unified, and frictionless. In many cases, your team can bypass dealing directly with underlying applications and take care of business more easily and quickly. They can do what you hired them to do, without having to puzzle over how to get things done.

- » Helping employees succeed
- » Achieving success for customers
- » Creating wins all around

Chapter 5

Reviewing Success with WalkMe's DAP

Organizations around the world are acquiring new digital technologies at an accelerating pace, yet they're often dissatisfied with the result of their purchases. They're recognizing that acquiring software is just the first step — and they can't reap the full benefits of the technology until they can get users to fully adopt it.

This holds true for employees trying to figure out the 300 or so applications that a typical organization acquires to help them succeed. But adoption is also a major issue for the makers of groundbreaking technologies. If their customers have trouble adopting their new products, it doesn't bode well for long-term growth and success.

A Forrester study commissioned by WalkMe — examining the collective economic impact that real-world customers enjoyed by implementing WalkMe's Digital Adoption Platform (DAP) — found significant benefits from successful digital adoption:

- » Increased application usage and process efficiency cutting thousands of hours of unnecessary time spent (and time is money)

- » Training and onboarding efficiency up by more than 100 percent
- » A 20 percent reduction in software license fees, achieved by ensuring software licenses are used to their full potential
- » A reduction by about half in support calls and help desk tickets
- » Increased customer retention by 35 percent, with a 10 percent growth in upselling

In this chapter, you discover three real-world case studies of digital transformation success with WalkMe's DAP (also just called WalkMe).

Enabling Employees

A major organization in open-source software products implemented WalkMe to improve its employee experience and help its team of about 15,000 employees succeed and thrive. It used WalkMe across the tech stack to drive digital adoption.

The organization's chief information officer (CIO) was able to observe, measure, and improve transformation initiatives. In-application guidance boosted self-help, and the ability to automate processes increased efficiency.



TIP

This organization achieved additional benefits through its WalkMe implementation:

- » Support and help desk tickets for one frequently used application dropped by 39 percent.
- » The organization tracked a \$915,000 yearly recaptured productivity gain for one application.
- » It saved \$683,000 on design and implementation training for managers adopting a new platform.
- » Through the analytical insights it gained, the organization more effectively managed software licenses, saving 20 percent annually.

Connecting with Customers

A major computing technology organization has been transforming into a cloud platform and cognitive solutions powerhouse, serving business-to-business customers worldwide. But it was finding that some of its most groundbreaking offerings were suffering from user abandonment, thanks to poor onboarding experiences and hard-to-access support.

Subscription rates and sales were suffering as customers failed to get up to speed. The products were exceptional, but users were disengaged because they were having trouble adopting them effectively. The organization brought in WalkMe to help new users onboard and adopt product features. Users were looking for the intuitive experience that WalkMe provided. The organization also integrated WalkMe with key applications to enable centralized data and analytics, which provided some valuable insights into the customer journey.

For this particular technology organization, WalkMe achieved the following:

- » Product usage, consumption, and retention grew by 300 percent.
- » The organization's digital offering revenue growth reached 80 percent, which was twice its growth target.

Serving Everyone's Needs

A popular customer-experience management (CXM) platform serves some of the biggest brands in the world, helping them crunch customer data and take positive action to improve experiences. Given how important the customer experience is, it's no surprise that the organization is growing fast and onboarding many new employees.

The organization implemented WalkMe for its employees to help facilitate that growth. It layered WalkMe over several enterprise applications, providing customized in-application guidance for applications impacting the vast majority of employees. The

organization used WalkMe to target pain points, found tools that weren't working well enough, and quickly set out to fix about ten of those tools.

WalkMe also helped with onboarding, which was becoming more and more of a bottleneck as the organization grew globally. It had nearly 2,000 employees, speaking 27 languages, working in 24 time zones. The WalkMe onboarding approach made it possible for new hires to quickly ramp up productivity and get settled into processes and technologies.

This particular organization also had a big need to onboard customers because its product is a powerful software platform. A key to satisfying its customers was helping them adopt the technology and get up to speed quickly, so it implemented WalkMe in a customer-facing way, too.



TIP

Just how valuable was this implementation that targeted both employees and customers? Here are just a few of the ways:

- »» For one travel management tool, employee support tickets dropped by 85 percent.
- »» On an important metric of customers using top new features within the first two weeks of adopting the product, the numbers were up 330 percent.
- »» Customers spent 30 percent more time in the platform helping to build more long-term customers.



Digital Adoption Platform

Create **data-driven** experiences

Gain visibility into the tech stack as you measure, drive, and act to ultimately maximize the impact of your digital transformation strategy.



USERS

BUSINESS
PROCESSES

ASSETS



Drive users to **success**

Drive user adoption of your digital assets on any device across your tech stack.

Solve the digital transformation puzzle

Your company invests a lot in revolutionary digital technology — so where are the revolutionary results? You may be struggling with digital adoption — getting your employees and customers to really use and benefit from the tools you're providing them. You don't need different tools or fewer of them. You need an enterprise-wide approach to digital adoption that makes it easy to embrace digital solutions, unlock their full value, and gain visibility into your increasingly complicated technology stack.

Inside...

- Survey fragmented technology issues
- Step back to see the big picture
- Create productive, happy employees
- Increase customer satisfaction
- Gain the full value of your investments
- Look into the tech stack
- Embrace a digital adoption platform



Steve Kaelble is the author of many books in the *For Dummies* series, and his writing has also been published in magazines, newspapers, and corporate annual reports. When not immersed in the *For Dummies* world or writing articles, he engages in healthcare communications.

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