



# Driving **business value** through user experiences

A playbook for business leaders



# Table of contents

## Intro:

Unveil the value of your business technology stack

03

## From recovery to disruption:

How IT is defining success

05

## The beating heart of the organization:

Leading HR projects to success

09

## From exponential value to exponential growth:

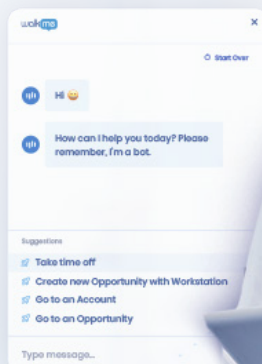
Accelerating the sales lifecycle

13

## Moving forward:

Realizing the value of tech stack investments

17



Digitization took on new importance in 2020 as the world adjusted to a professional and personal world that turned overwhelmingly remote. The ability to adapt quickly to accommodate employee and consumer needs became a business imperative and, for the first time, the business implications of a successful digital transformation were played out in real-time. In a matter of months, **digital transformation went from an aspirational priority of the future to the number one priority of the moment.**

“Don’t use **yesterday’s linear business solutions** to tackle today’s **exponential challenges.**”

[CIO Outlook for 2021, Constellation Research](#)

This year, CIOs across the board are focusing on digital transformation. Constellation Research found that [77% of CIOs](#) classify digital transformation as their number one budget concern for 2021.

Digital transformation affects every part of the organization—from IT to Sales, HR to Marketing. The challenges associated with digital transformation, chief among them resistance to change and productivity costs of retraining, often overshadow its benefits. **In an ideal world, all teams would have high levels of [digital dexterity](#) and embrace technological change with open arms.** In reality, people like their routine and are averse to change. Coupled with the high productivity costs brought on by learning new software, it’s no surprise that 78% of enterprises fail to scale their digital transformation initiatives.

## The business value of user experience

While most end-users are not decision-makers in the digital transformation process, their actions—or inaction—will in largely define its success. If a sales representative cannot accurately maneuver within their CRM to enter data accurately, and forecasting is consequently compromised, the value has not been achieved. If a new HRM is implemented, but managers don’t remember how to submit a new hire request, the organization has not realized the value of the technology it implemented. Conversely, if users are immediately able to leverage new and existing software as intended, then the successful user experiences will enable organizations to realize the value of their technology.

**But true value is not only about gaining more out of existing or new software—it’s the ability to continuously gain value regardless of changes in business goals, employee and customer expectations, or changes to software.**



## Taking the driver's seat—your role in producing business value

Digital transformation encompasses all transitional efforts in which an organization adopts digital technology, digital business practices, and a digital culture – and it doesn't have to begin with the implementation of new technology. Digital transformation is also about getting more value out of existing technologies.

To achieve value, transformation has to go hand-in-hand with digital adoption, making it a priority in implementing software, technology, workflows, or even a new cultural behavior. **Laying a structured foundation of digital adoption promises a wide range of positive effects for the users from proficiency to high productivity.** It's about connecting business goals to employee and customer experiences – across their digital journeys.

“By 2025, 70% of organizations will use digital adoption solutions across the entire technology stack to overcome still insufficient application user experiences.”

Source: Gartner, 'Improve Employee Usage, Engagement and Productivity with Digital Adoption Solutions', Stephen Emmott, Melissa Hilbert, November 25, 2020.



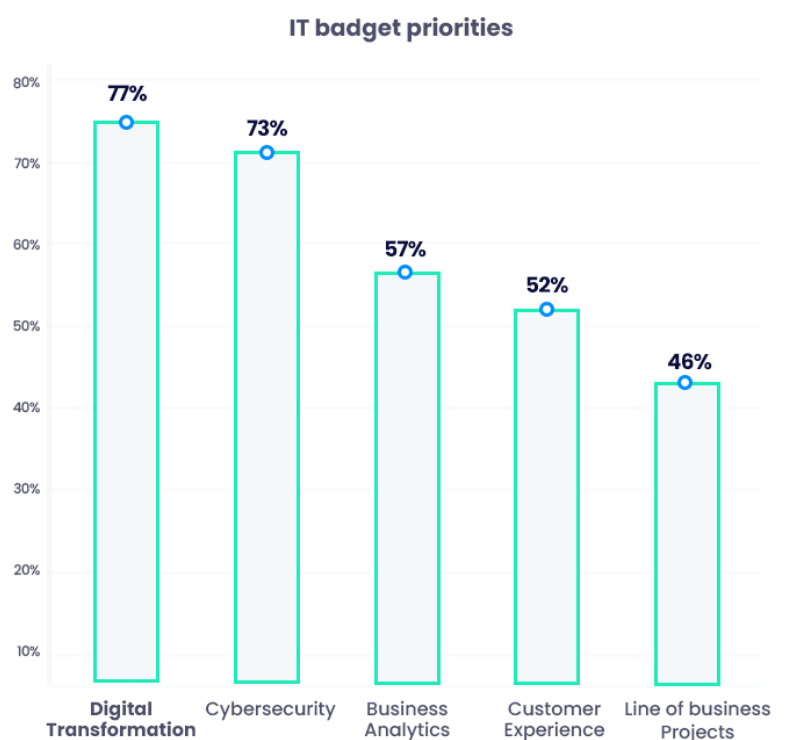
# From recovery to disruption: How IT is **defining success**

The disruptive, sudden shift to remote work accelerated by COVID-19 shook IT departments across the globe. From managing resources and keeping the organization afloat, to finding the right solutions to empower long-lasting change, IT took the front seat in ensuring business continuity. IT is strategically positioned to reveal the true value of tech stack usage, uncover misused or even unused software, and with it, reduce the IT involvement in support.

“56% of budgets and staff remain unchanged compared with before **COVID-19.**”

Source: “The CIO Outlook for 2021.” Constellation Research, 2020

Surprisingly, and in spite of so many changes, IT budgets in most parts remained the same and were not affected by COVID-19, according to a [CIO survey conducted by Constellation](#). Close to two-thirds of Fortune 500 CIOs surveyed reported their budgets remained the same. **While the budgets spent were mostly across security tools prior to the COVID-19 pandemic, the priority has shuffled, placing digital adoption tools on top, marking them the most pressing concern across all aspects of the organization**—from restructuring IT to support the organization, through taking charge on customer experiences.



Source: “The CIO Outlook for 2021.” Constellation Research, 2020

## Building a future-proof organization

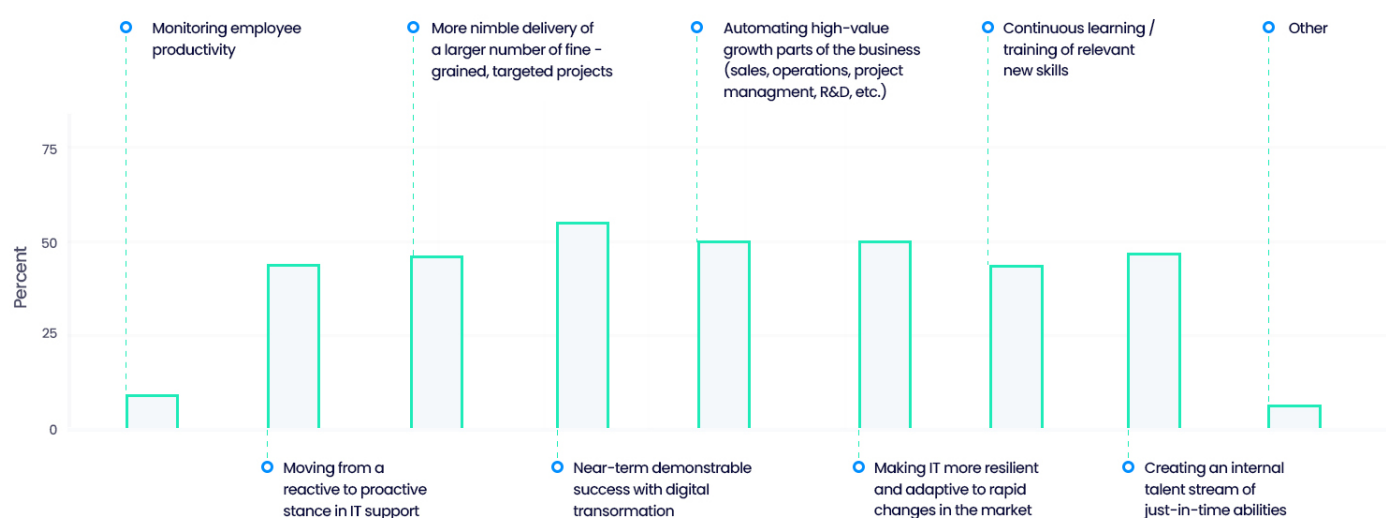
While budgets are not necessarily being cut, IT remains on the lookout to gain more value out of existing technologies by automating workflows, portfolio assessment, using untapped features, and employing solutions that maximize IT uptake. Thus begging the question: **how can IT leaders maximize the impact of their existing technologies and accelerate the return on their software investments?**



Source: "The CIO Outlook for 2021." Constellation Research, 2020

## The dilemma: To invest in new software or learn how to take advantage of the existing ones?

Thinking ahead, when CIOs were asked what will be the key factor to future-proof the organization, automation comes first. Over half of the respondents opted for automation, followed by making IT more resilient to disruption (51%) and creating a talent stream of just-in-time skills and abilities (49%).



Source: "The CIO Outlook for 2021." Constellation Research, 2020

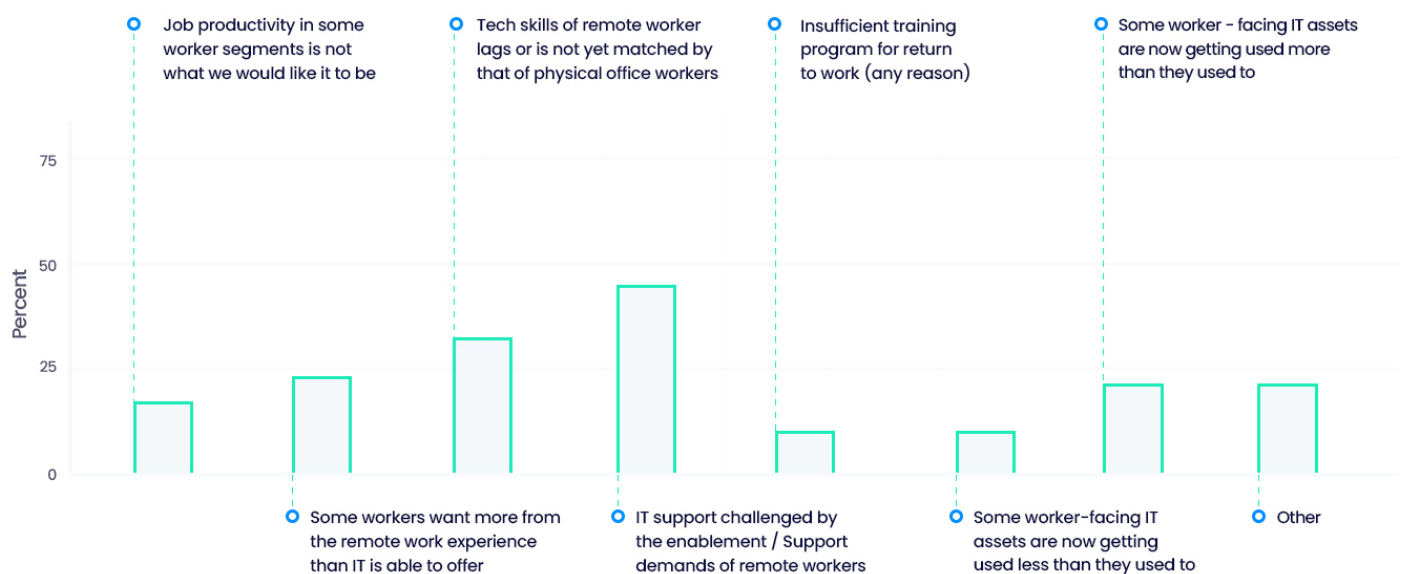
Moreover, the data revealed several clear strategies for improving the effectiveness of IT in the near term - through automation (72%) more self-service IT (63%), as well as entirely new IT solutions that can help them better address the situational realities in which they find themselves today (42%).

## The future-focused CIO

Looking ahead, CIOs see themselves as key influencers in most parts of the business including customer experience, operations, recovery of the organization post-pandemic, and innovation, as well as overall leadership of the organization. To do so, **they need the right technology to lead the organization through successful digital adoption, to ensure resilience and agility with any change that may come.** When asked what activities will help future-proof the org, automation again stood out as key (51%), making IT more resilient to disruption (51%) and creating a talent stream of just-in-time skills and abilities (49%).

Between the many challenges to overcome, and cross-functional alignment needed to support the organization through change, **CIOs must present themselves in the core business strategy of the organization for successful change. To do so, they need the right data and visibility into their digital portfolio on the one hand, and the ability to create seamless user experiences for users across the organization, and across any platform.**

Top challenges for remote work policy and programs today



Source: "The CIO Outlook for 2021." Constellation Research, 2020

## Defining success

As stated by Constellation Research, **"don't use yesterday's linear business solutions to tackle today's exponential challenges."** CIOs need a multitude of solutions to adapt the organization to change, to become more resilient and future-proof. This could mean adopting no-code solutions, automating processes where possible, leveraging integrations, and embracing new approaches to training and service.

At the end of every business process there is a user - employee or customer - adapting to change. IT leaders are uniquely positioned to provide support, to employ new services and leverage analytics to ensure coverage, reach, and acceptable response times. Helping the organization heal and recover via all means possible will make the goals reported by CIOs in the survey much more achievable.

A Digital Adoption Platform (DAP) plays a critical role in empowering every organization to realize the promise of their technology and business goals, all while ensuring business continuity, work from anywhere and a digital customer journey. To future proof an organization's ability to contain digital change, IT leaders must build a resilient adoption plan, based on true data and visibility into all tech investments. Only once securing insightful and adaptable insights into software usage and digital journeys, an organization is able to redirect employees' work, costs and time spent to exercise growth and increase actual return on investments.



### Gain visibility into your tech stack.

Track completion rates of business processes to understand and improve user behavior across applications.



### Drive measurable change & software ROI.

Save time and relieve employee frustration by automating tasks in and across applications.



### Build an agile, resilient workforce.

Accelerate time-to-competency on all enterprise software and create personalized user experiences.

“WalkMe had a huge impact on Sprinklr in a short period of time - we use WalkMe for both our employee-facing applications and our customer-facing SaaS solutions, and our time to value was within 90 days for both use cases. Creating a frictionless employee experience leads directly to **customer happiness and overall growth**. With WalkMe, employee support tickets **reduced by up to 85%** and the customer time in the Sprinklr platform **increased by 30%** in the last year.”

Asha Aravindakshan

VP of Customer Delight and Operations

85%

reduction in employee support tickets on a travel management tool

2X

users interactions with the search bar functionality



Sprinklr boosts productivity, improves user experience, and reduces support needs for both employees and customers with WalkMe.

[Learn More](#) →



# The beating heart of the organization: Leading **HR projects to success**

The HR digital landscape is becoming increasingly complex, challenging HR business leaders to create the right infrastructure to support business needs and keep employees engaged. As stated by the [UNLEASH report](#) on HR technology, when it comes to supporting transformation, **HR systems are now change enablers rather than just operational props.**

**“Today, the average large company has 11 systems of record.”**

Source: “Why HR projects fail”, UNLEASH, 2020

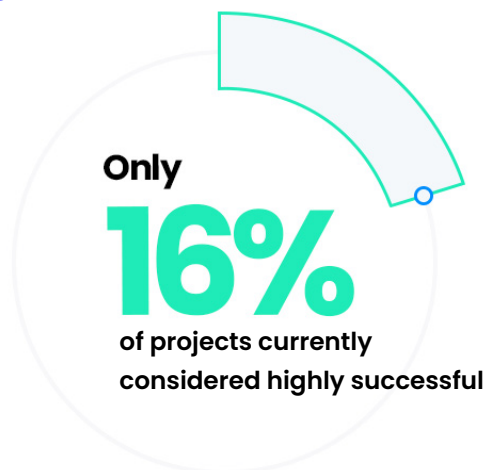


**HR processes have seen rapid digitization.** On the one hand, organizations are coming to realize the potential of cloud-based HCM systems, however complex the transition may be. And on the other, HR tools and applications are being adopted to answer the needs of the HCM which inherently form a complex process. However, results are only achievable by employees successfully adopting and engaging with the technology, leading HR teams to use multiple infrastructures in order to monitor and assess productivity. 36% out of respondents participating in the UNLEASH survey say they are starting to establish a more consistent employee experience across multiple platforms through a centralized portal or third-party application. What are the challenges involved when deploying so many tools?

More than half of respondents in the HR survey conducted by UNLEASH said they are using over five systems of record and 26% shared they are using eight or more. These systems undergo regular updates and replacements, and over half of respondents stated they have replaced an HR system five times or more in the past four years.

## What makes HR projects fail? From scattered information to misleading data

According to UNLEASH, only 16% of respondents have crowned an HR project as a success. **The question is—what happened to the remaining 84%?** In order to “transform and grow” HR teams manage the change and dictate the new operational capabilities across the company, or in other words, change how employees use software.



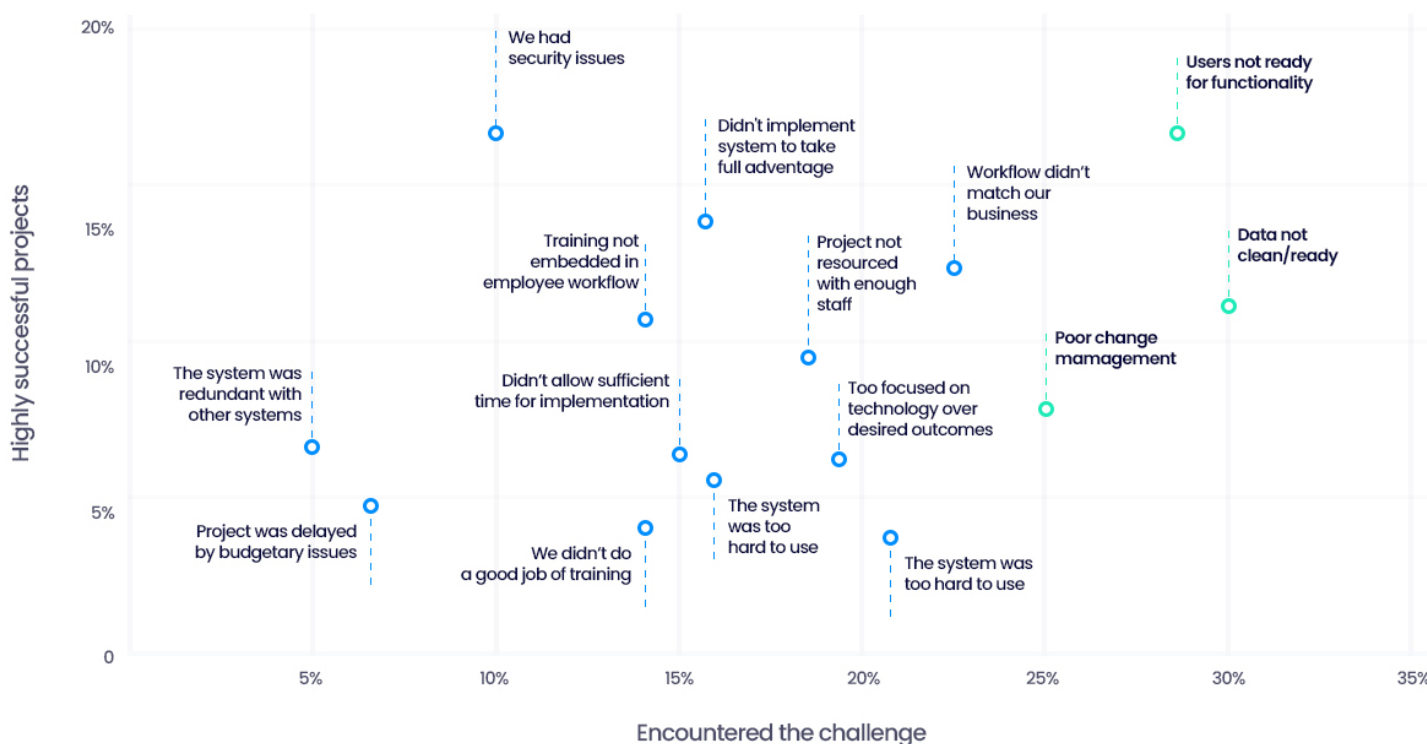
Source: "Why HR projects fail", UNLEASH, 2020

## Digital dexterity

**Digital dexterity** – The desire and ability of employees to embrace existing and new technologies to achieve better business outcomes.

As expectations and work load exceeds build up year over year, the key for a successful adoption process relies on enabling and supporting employees to embrace existing and emerging technologies to achieve better business outcomes.

## Common challenges that affect HR projects



Source: "Why HR projects fail", UNLEASH, 2020

## Executing success - it's all about (digital) employee experience

In a time which is fragile for veteran employees or new hires onboarding completely remote, HR needs to reinvent how employees engage with software. The true essence of HR technology goes beyond digitizing standard processes – and toward creating seamless digital employee experiences.

Digital Adoption Platforms (DAP) support HR teams as they **strive to truly transform how they connect business needs and goals with employee experiences** – from more effective learning and onboarding, to embracing the challenges faced by generational and cultural differences.

With employees being the core asset of the business, it is only crucial that HR will keep them motivated, educated and resilient to change by being empathetic to employee needs through technology that truly supports them – from just-in-time help, to communicating important and time sensitive updates, to making it that much easier to get the job done. With that, shaping employee experiences by reducing churn on the one hand and supporting proficiency on the other hand comprise a functional productive business that generates value.

### How digital adoption platforms are transforming HR:



#### **Ramp up employees in no time.**

Quickly and efficiently onboard new employees with personalized onboarding and in-app software training.



#### **Optimize productivity cross-application.**

Save time and relieve employee frustration by automating tasks in and across applications.



#### **Empower hybrid work environments.**

Keep employees engaged in remote or hybrid work environments by reaching them directly on their desktops.

“WalkMe has **changed our learning landscape**. In the past, we've always had to be more reactive in the way we approach learning. Now, we can actually **roll out the learning alongside the system or the new product**.”

**Tobias Washington**

Director, Learning Experience, Design and Technology, Christus Health

**\$1M**  
/month

in improved  
payment outcomes

WalkMe  
layered across

**20+**  
applications



Christus Health uses WalkMe Digital Adoption Platform to roll out crucial technology to healthcare professionals.

[Learn more](#) →





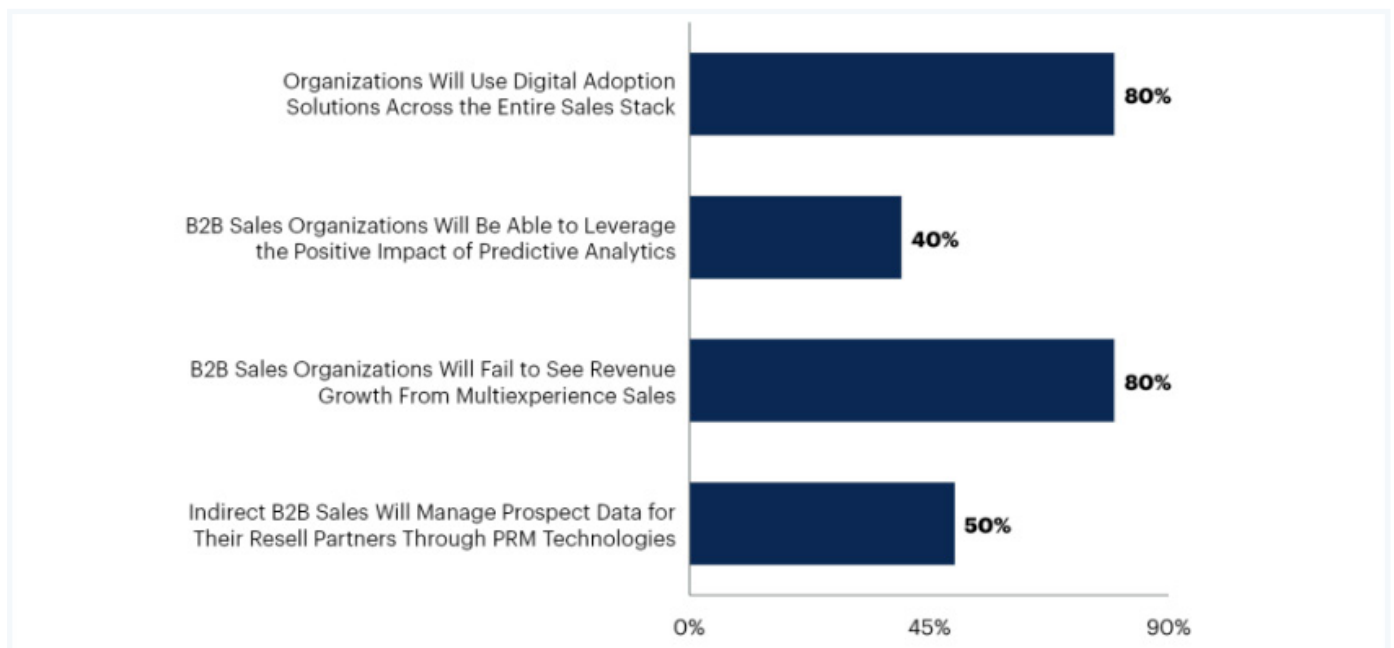
# From exponential value to exponential growth: accelerating the sales lifecycle

## Tech vs. sales

The sales process has undergone major changes over the last few decades, with a digital solution now available for every step of the way, from lead to prospect and through cash. Having to balance many applications puts a toll on the sales team. Down the line, it affects the entire selling process by keeping the sales reps occupied with tools instead of investing in prospects and building a pipeline. Inevitably, complicated or overcrowded multiple-app sales processes lead to sales teams being disengaged and less productive, posing a direct threat to business goals.

## 2021 CRM sales technology predictions for the future of sales.

By the year 2025



Source: Gartner, 'Predicts 2021: New Selling Imperatives Drive CRM Sales Technology Roadmaps', Ilona Hansen, Adnan Zijadic, Melissa Hilbert, Tad Travis, December 03, 2020

## Overcoming selling barriers

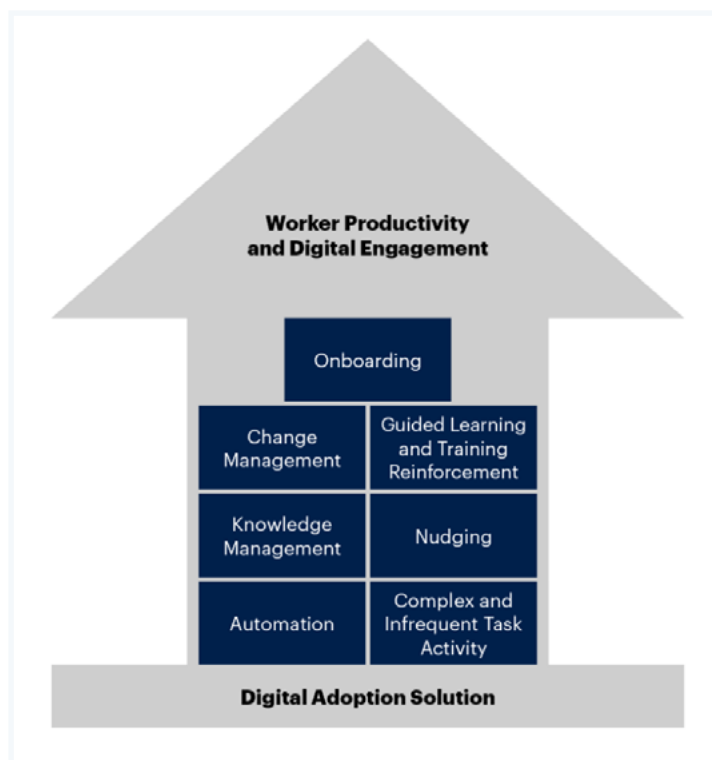
With a myriad of applications, sales organizations are distraught by long onboarding processes, complicated processes and a loss of productivity hurting pipelines. And with so many tools in place, according to Gartner 'Improve Employee Usage, Engagement and Productivity with Digital Adoption Solutions' report, "Client inquiries regarding DAS show a significant increase, month on month, between 2019 and 2020".

The Gartner report, Predicts 2021: New Selling Imperatives Drive CRM Sales Technology Roadmaps, states that, "Employees with a high-quality UX are at least 50% more likely to have high levels of work effectiveness, productivity, discretionary effort and intent to stay with their current employer. Despite this positive impact, the survey found that only 29% of sales respondents reported high-quality UX". Further, the Gartner reports predicts that, "By 2025, 80% of organizations will use DAS across the sales stack to overcome insufficient application UXs".

## Digital adoption solutions increase engagement and productivity

Organizations struggle to balance the implementation of new software, without hurting productivity. Between learning an abundance of solutions required to perform their job, employees will too easily disengage from the technology and abandon untouched features that they are not familiar with. **Only an organization that accommodates digital changes by enabling employees and supporting them through digital change, will see prosperity on software return.**

Overcoming knowledge gaps and user challenges requires a tool that can pick up the pace when users are off path – whether the user is aware of it or not; a tool that will meet sales reps exactly when and where they need it. This includes when they need a push to get started from the second



[Gartner, 'Improve Employee Usage, Engagement and Productivity with Digital Adoption Solutions', Stephen Emmott, Melissa Hilbert, November 25, 2020](#)

[Gartner, 'Predicts 2021: New Selling Imperatives Drive CRM Sales Technology Roadmaps, Ilona Hansen, Adnan Zijadic, Melissa Hilbert, Tad Travis, December 03, 2020.](#)

they open up their CRM for the first time, or alerts along the way to make them more productive as they complete cross-application and data-sensitive processes – all of which impact the business' bottom line.

**“By 2025, 80% of organizations will use DAS across the sales stack to overcome insufficient application UXs.”**

[Gartner, 'Predicts 2021: New Selling Imperatives Drive CRM Sales Technology Roadmaps,' Iona Hansen, Adnan Zijadic, Melissa Hilbert, Tad Travis, December 03, 2020](#)

## Exponential value = exponential growth

Organizations have inherent roadblocks that prevent sales from achieving the business goals that they initially set out to achieve through technology. From resisting change, time pressures and knowledge gaps, business success is only as high as sales organizations are able to adopt any technology, to ensure that business goals are not only met – but exceeded. **Software used by sales organizations are no longer tactically nice to have tools, and are an integral part of the strategy that defines not only a digitally mature business – but a successful one.**

A digital adoption platform serves two sides of the map – from a business perspective, sales executives have visibility into how their reps are truly performing based on the software that they use and the business processes they compete; they have visibility into how their newest reps are onboarding and where the sales org struggles. On the other hand, Sales reps are no longer wasting time in trying to figure out their software, so that they can focus on selling and ensuring that they meet or exceed their quotas, regardless of which software they are using. And even if their software changes in a day's notice, they can continue to complete their goals without hurting their commission.



### **Increase visibility into your sales stack.**

Gain visibility into software usage, employee productivity, and user journeys across the sales cycle.



### **Boost data integrity and forecasting.**

Ensure accurate data entry through automation and proactive alerts, thereby improving forecasting.



### **Accelerate time-to-competency.**

Shorten onboarding and ramp-up time with on-the-go and task-specific training.

“The true value of WalkMe, is its **ability to work across applications as an organization-wide change management solution**. So we see the **value of our investments** in our tools straightaway.”

**Jeff McKittrick**

Fmr. Vice President of Sales Business Capabilities, Hitachi Vantara

**86%** Reduced  
Training Time

**88%** Increase in  
adoption rate of  
digital sales tools

**HITACHI**

Hitachi Vantara uses WalkMe to drive digital adoption, boost sales productivity across technology stack

[Learn more](#) →





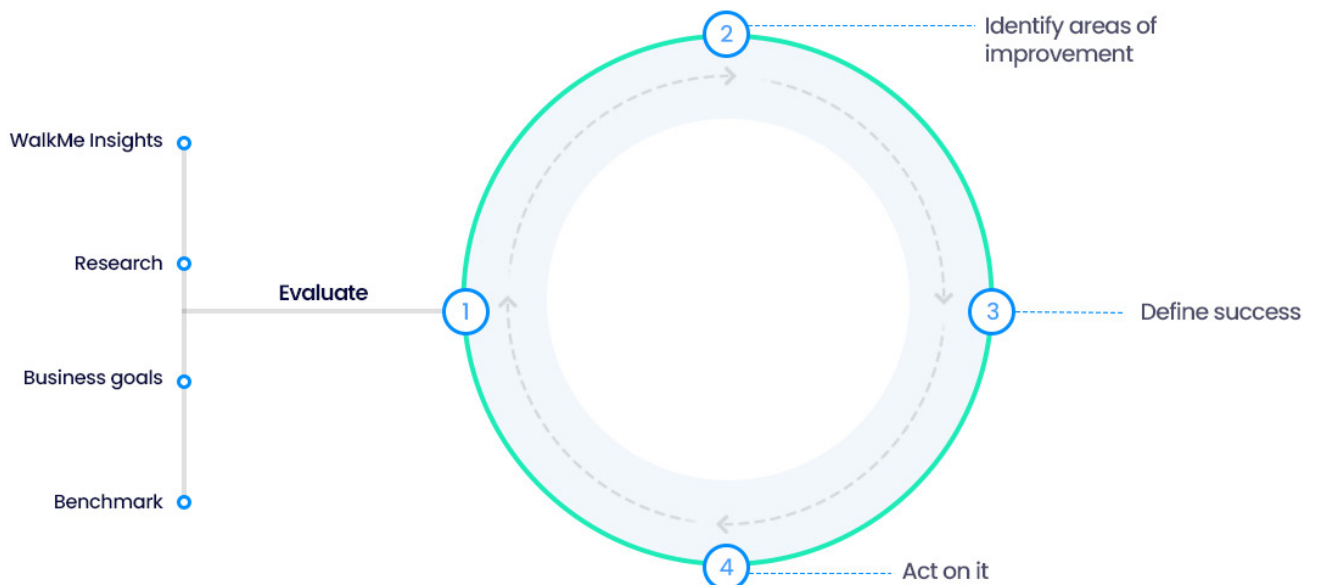
# Unlock the value of your tech stack to boost ROI - **boosting ROI**

**Moving forward**, technology has not only inflicted major changes to our wellbeing, but it has also changed the course of how we do business. While every business decides to take the most cutting-edge and innovative software in order to sell and perform, digital transformation efforts become irrelevant when not used to the fullest extent. All of the hard work put into change management goes unmet.

With WalkMe, organizations can truly maximize and accelerate the impact of their digital transformation strategy by driving user adoption of digital assets. WalkMe's Digital Adoption Platform constantly identifies gaps and problem areas, and drives users to success, and without changes to underlying platforms.

## When people and technology work as one

Digital adoption is the process by which companies ensure that their employees and customers are making use of their digital assets. WalkMe's Digital Adoption Platform provides business executives with the full set of tools and means to ensure digital transformation success – from assured user adoption of digital assets on the one hand, and the data and insights to back up, measure, and optimize digital journeys for employees or customers.



While organizations face constant market shifts, software and employees are subject to change as well. With the ability to consistently evaluate the actual use of digital assets at hand, **organizations can identify gaps and proactively act to provide answers to uncovered pain points – ensuring that no matter what change comes along, the organization remains both agile and resilient.**

## Securing business value with a digital adoption platform

WalkMe's Digital Adoption Platform (DAP) is a code-free software that enables organizations to measure, drive, and act to ultimately maximize the impact of their digital transformation and accelerate the return on their software investment.

The unified, strategic platform drives value through the following building blocks:

### Data & Visibility

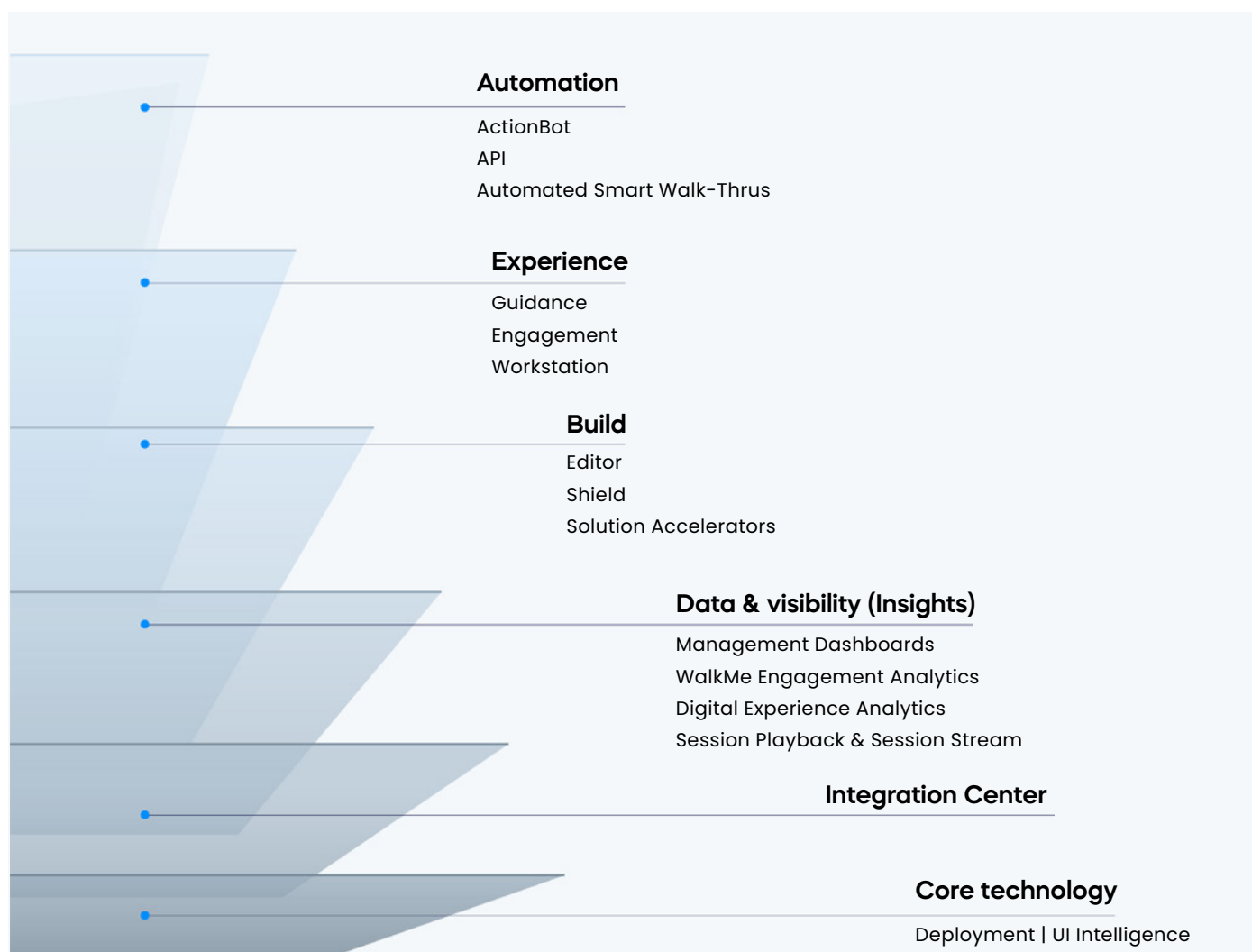
Provide business executives with visibility across the tech stack and the insights needed to measure, drive, and act to ultimately maximize the impact of your digital transformation strategy.

### Experience

User experience is the driving force of WalkMe. Design contextual and personalized experiences that engage and drive user adoption of your digital assets on mobile, web, and desktop.

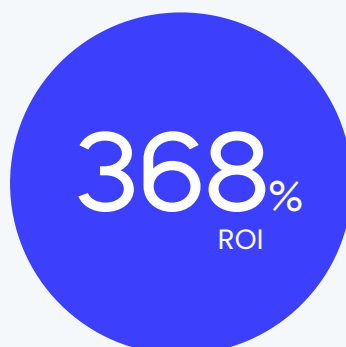
### Underlying Technology

Our core, patented technology leverages machine learning and AI to identify user sentiment in context to drive users to success.



Discover how WalkMe's Digital Adoption Platform delivers value in less than 3 months and increases over time:

**<3 month**  
Payback Period



**\$20,042,842**  
Present Value benefits  
over 3 years

Source: Forrester Total Economic Impact (TEI).™ Study

[Learn more](#) →

## 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. Our code-free platform leverages our proprietary technology to provide visibility to an organization's CIO and business leaders, while improving user experience, productivity and efficiency for employees and customers. For more information, please visit our website at: [www.walkme.com](http://www.walkme.com)

WalkMe is successfully deployed on:

