

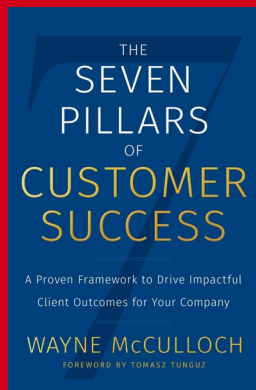
Train Software, Not People

How Digital Adoption Has Changed The Game... Forever

Wayne McCulloch

Chief customer Officer

Who is Wayne?

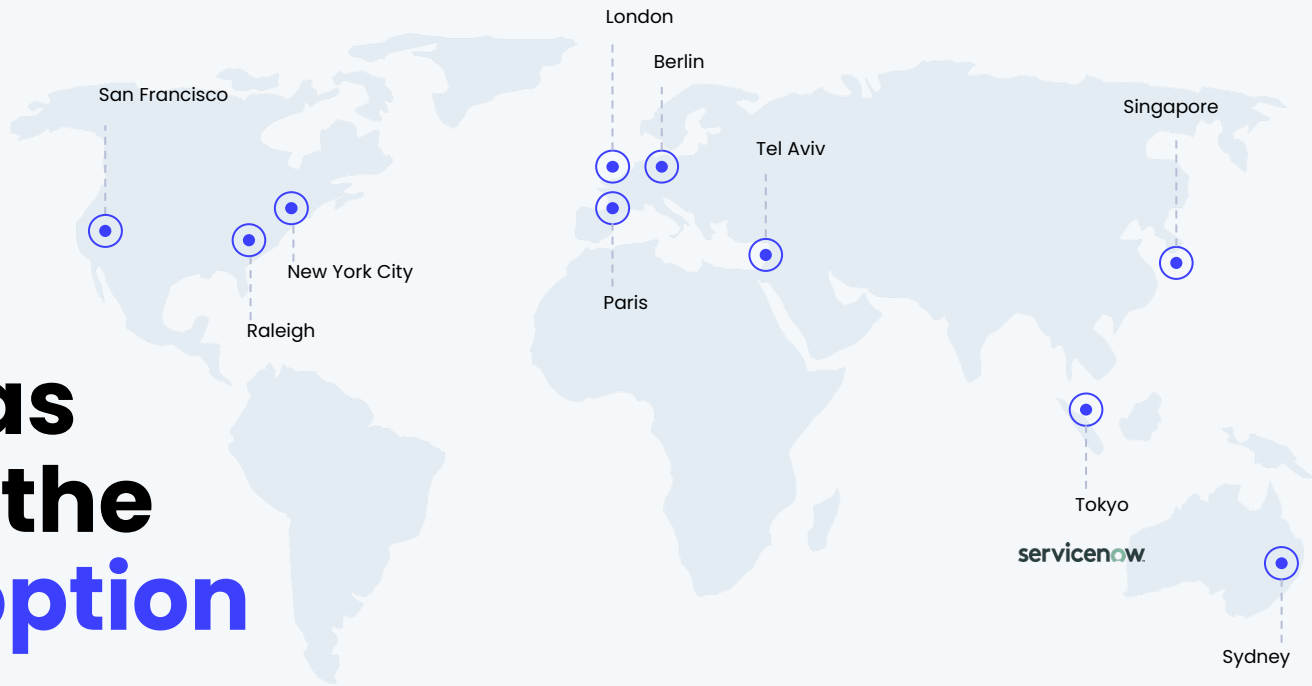


PeopleSoft



Google





WalkMe has pioneered the digital adoption platform

31% of
Fortune 500

9 of
Fortune 10

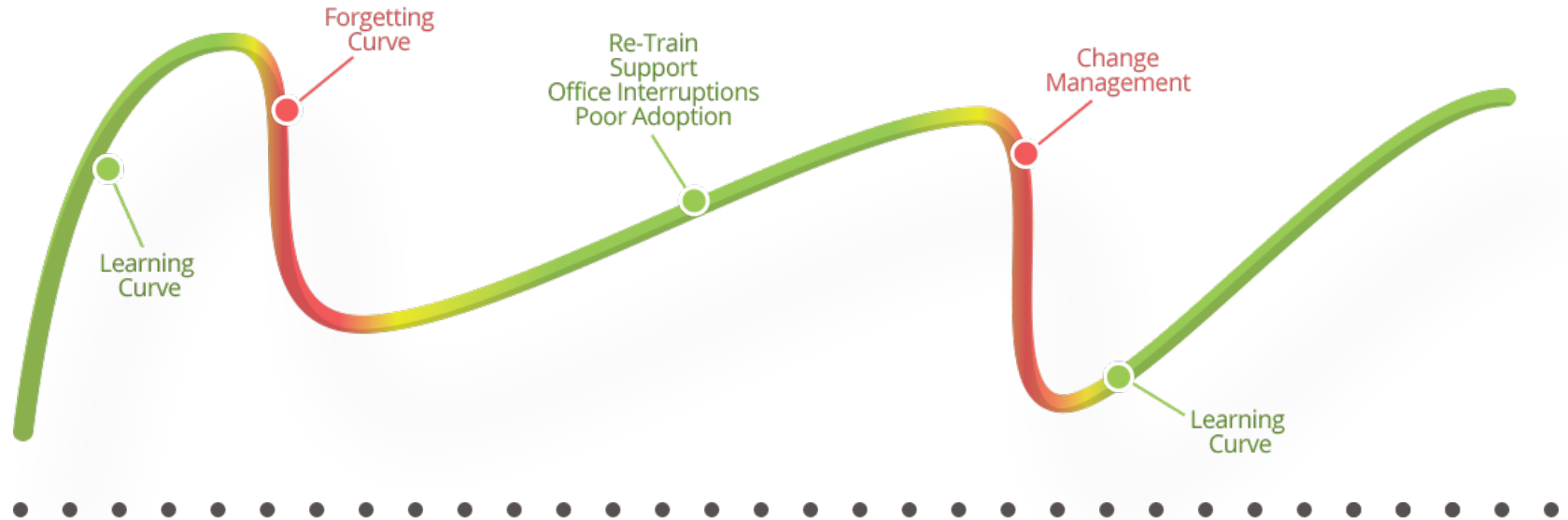
21 Billion
Interactions

55 of
Fortune 100

What's the Problem.

And there are more than one...

The Way Humans Learn



Four Forces are Driving a Tectonic Shift in Training

Employees

Who is Today's Employee?

- Don't know how to remember; know how to access
- Change positions often
- Highly distracted
- Expect consumer-level UX
- Diversified in terms of Digital IQ



Four Forces are Driving a Tectonic Shift in Training

Workplace

Digital Workplace

- Increased Reliance on Technology
- Undergoing major digital transformation
- Digitization of everyday processes
- HCM / CRM / ERP



Four Forces are Driving a Tectonic Shift in Training

Decentralization

Decisions are Fragmented between Departments

- From centralized IT decision-making to line-of-business and geo-local ownership
- From one centralized large vendor for all organizational needs to best-of-breed solutions



Four Forces are Driving a Tectonic Shift in Training

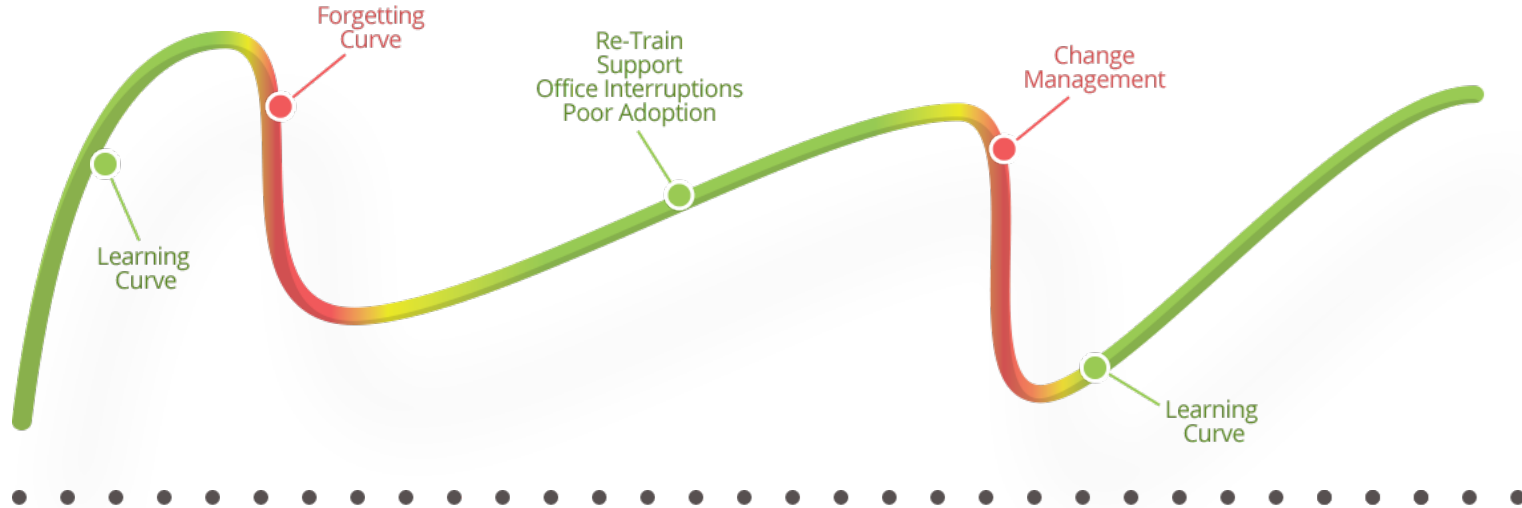
Cloud Technology

Cloud Creates a Training Challenge

- Multiple software releases
- Regulatory Burden
- Regular shifts to the underlying platform on both the vendor and user sides

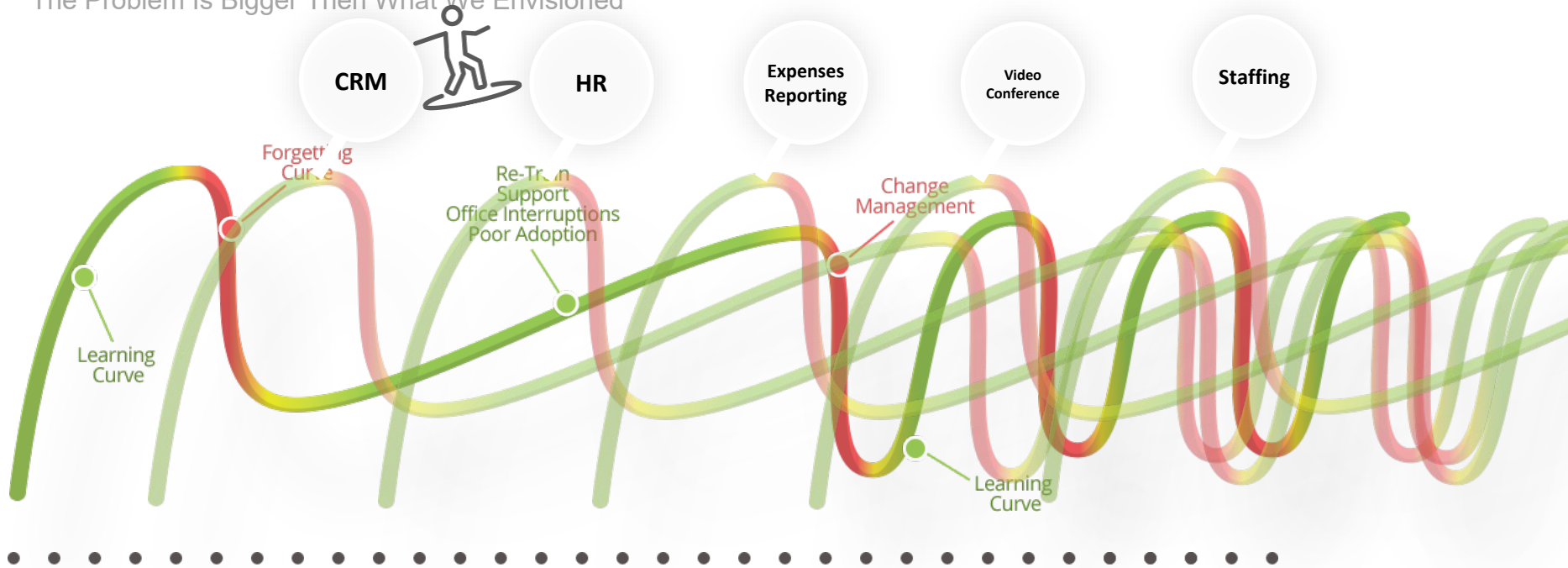


The Way Humans Learn



The Way Humans Learn

The Problem Is Bigger Than What We Envisioned



The evolving workforce

Pre-pandemic

Only 22% of organizations were ready for mass remote working prior to the outbreak

April 2020

17% create department-specific work from home policies

February 2021

Salesforce declares the 9-to-5 workday is dead

March 2020

37% implement a mandatory, company-wide work-from-home

May 2020

Twitter, Shopify, Nationwide Insurance & more announce employees can work from home indefinitely

April 2021

The Great Resignation takes off

© Copyright
CEDMA

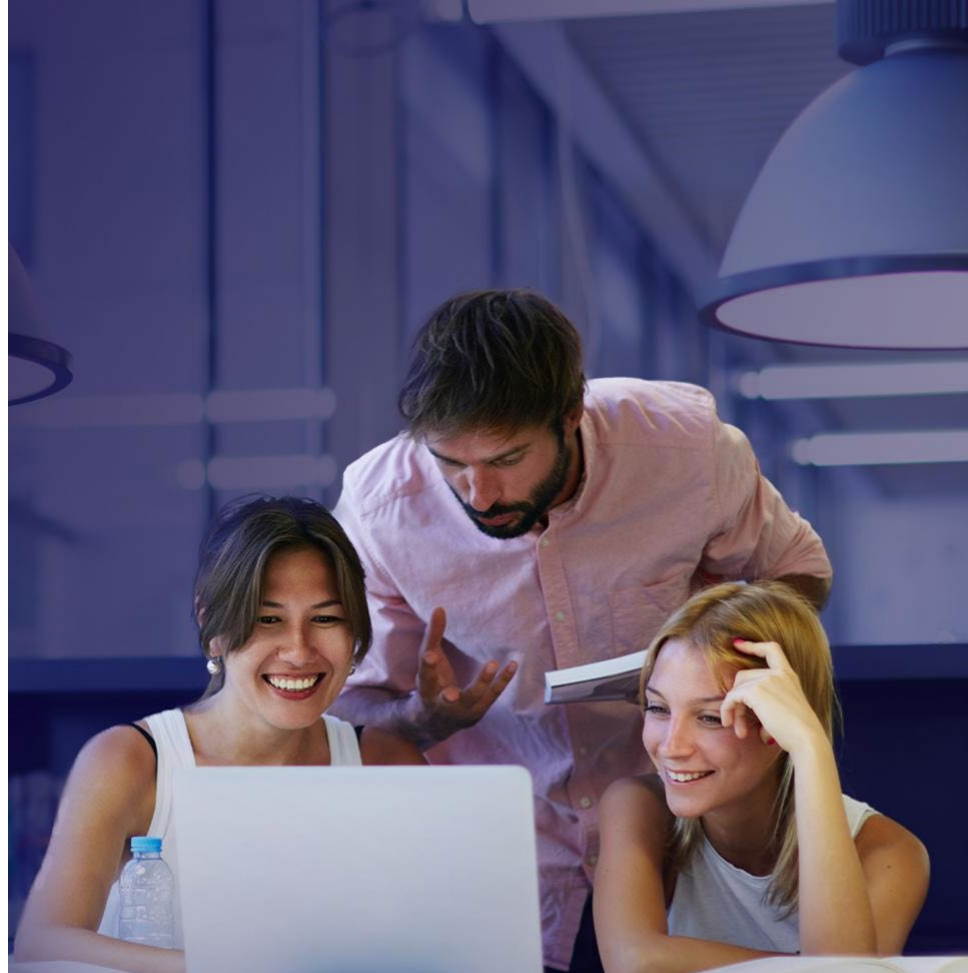
Be Honest - Where Does Digital Transformation Really Come From?

Admins and Developers

We focus here because it's critical to get the software in place, but...

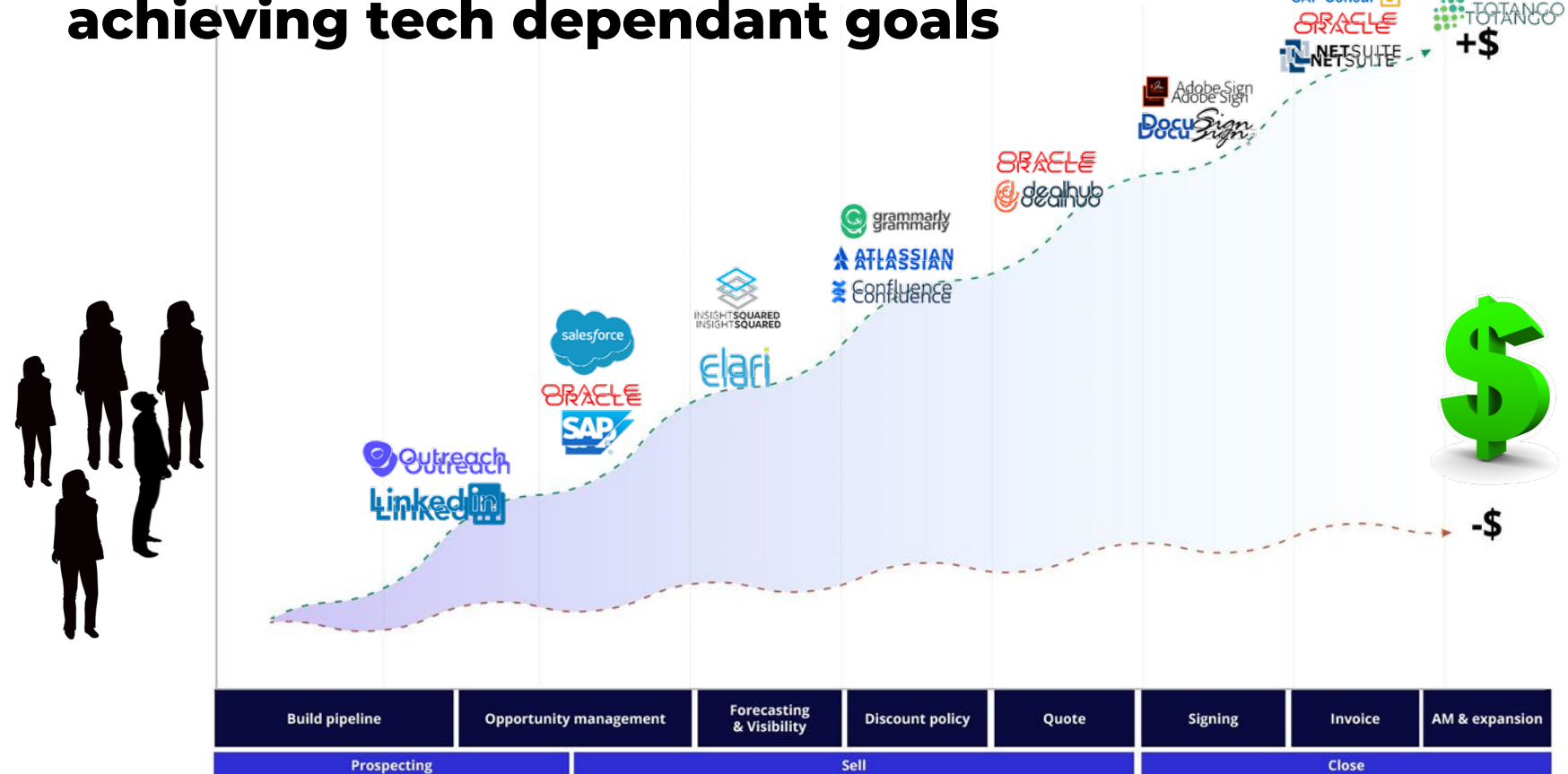
Users

This is actually where the value of your product manifests itself. And it's the hardest and least focused on from a software vendor perspective



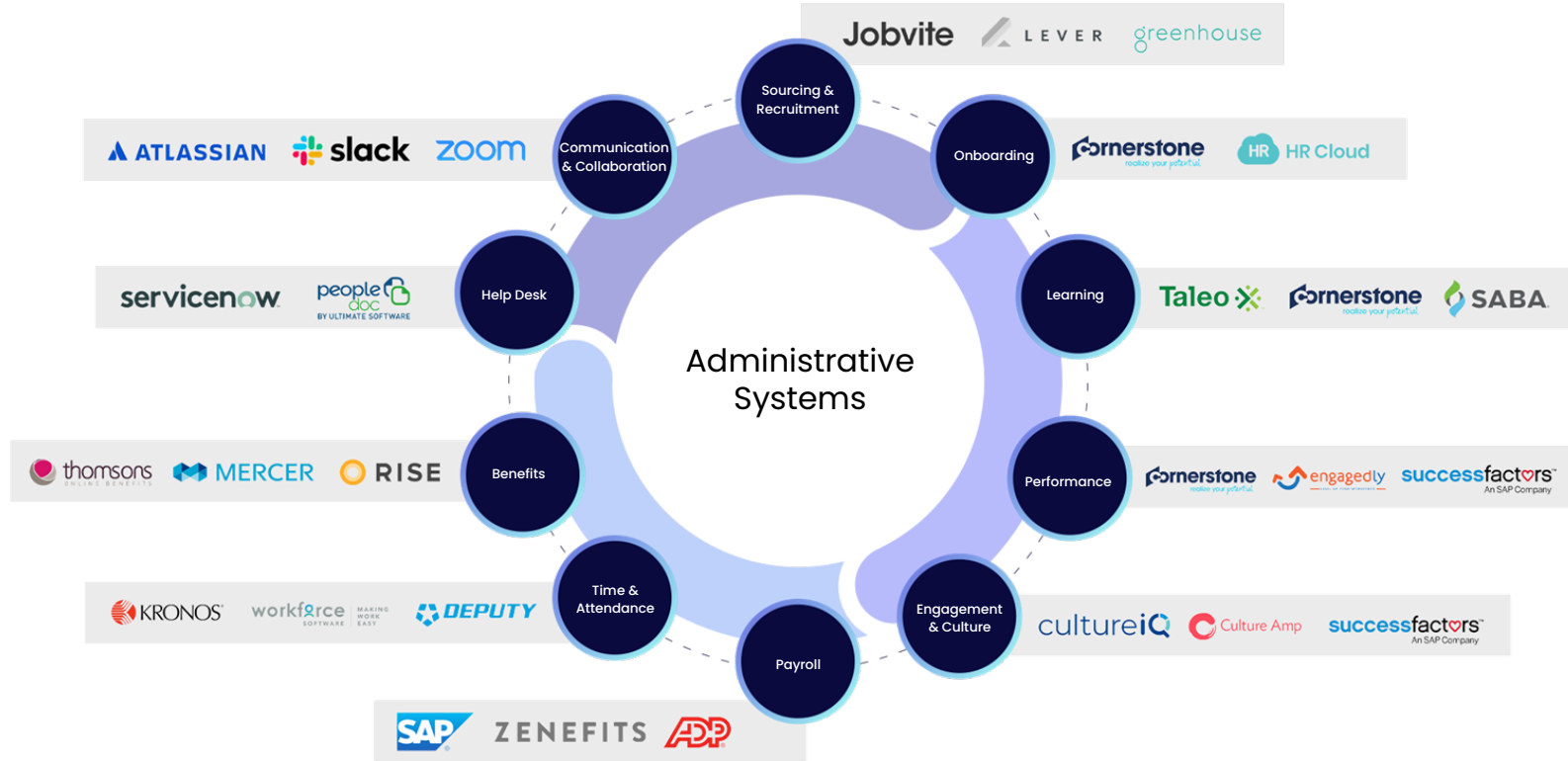
Example Sales Executive

Technology gets in the way of achieving tech dependant goals

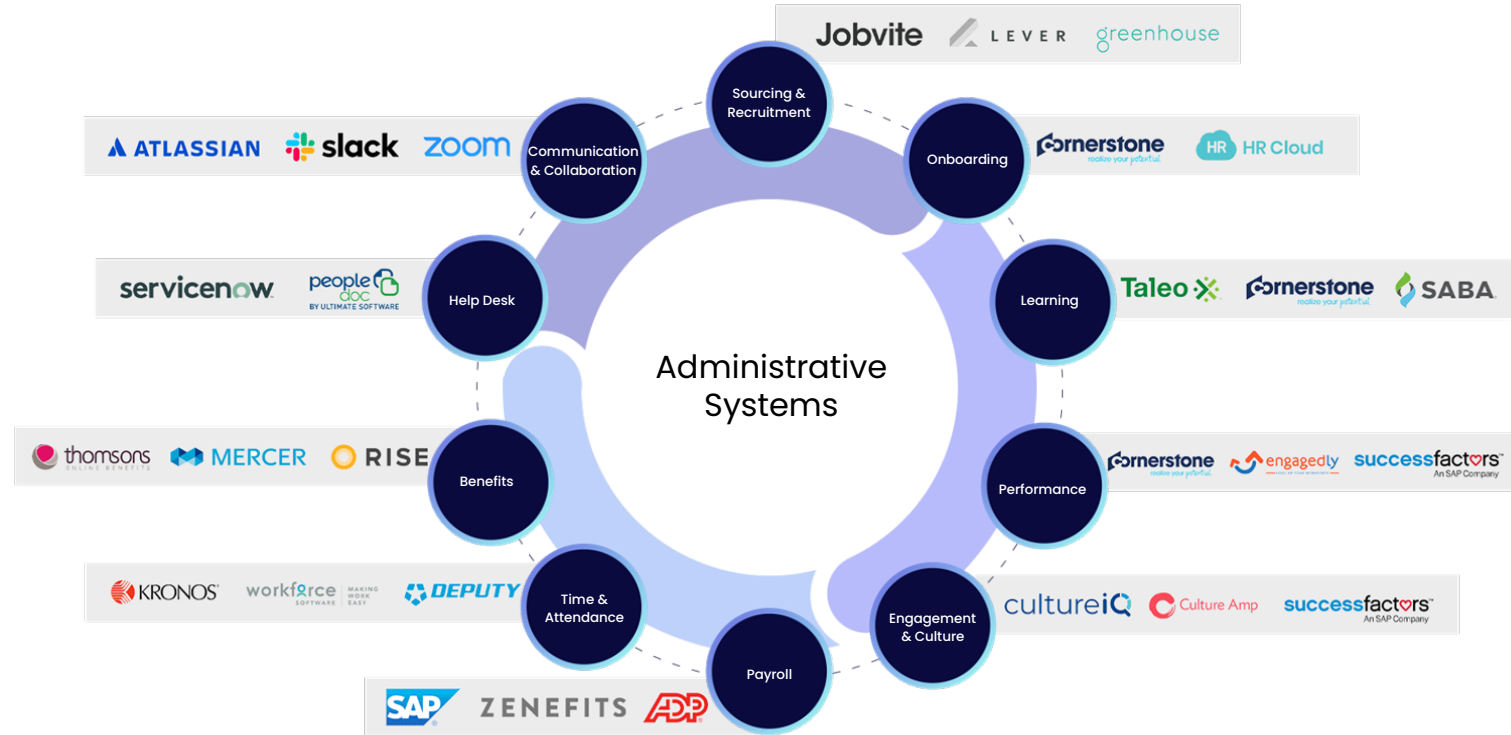


But this impacts everyone in the organization.

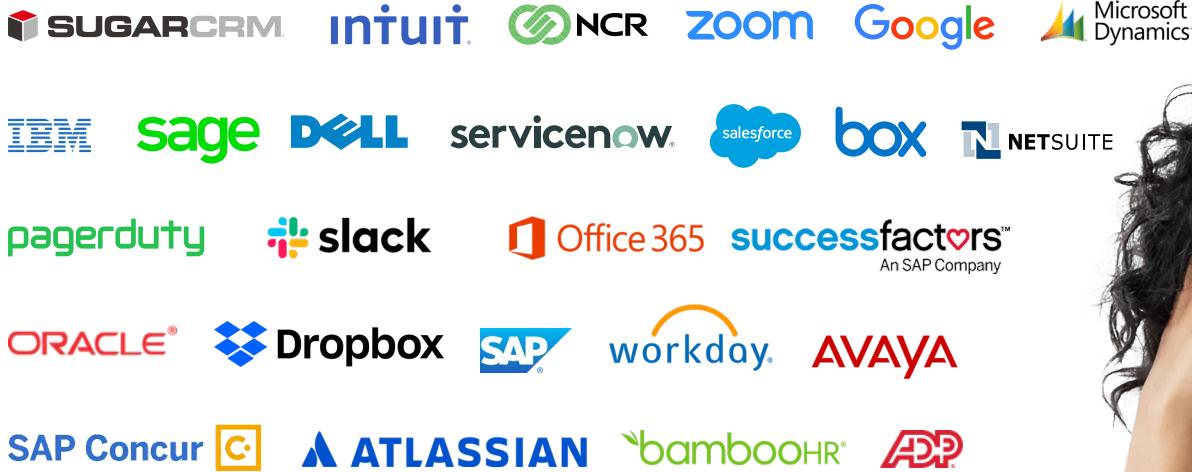
Promise vs. Reality employee view



Promise vs. Reality employee view



Employees are Overwhelmed



Daily workflows for entry-level employees can include
dozens of software applications a day





The Modern SaaS Education & Training Professional

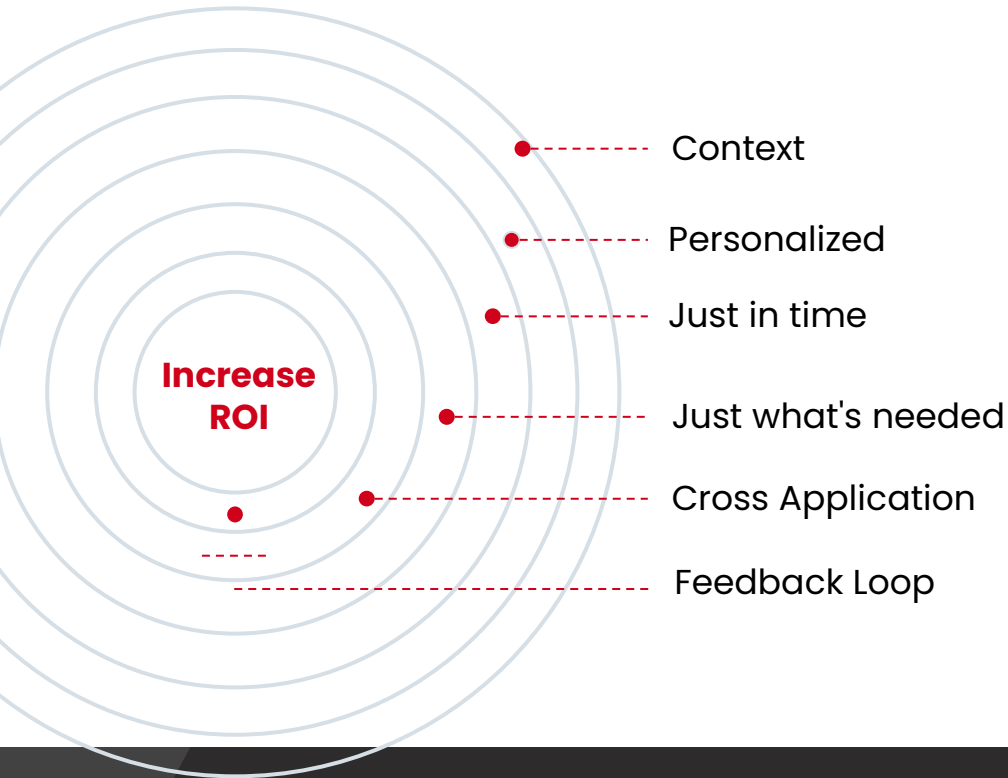
Head Above Water

How do you keep up with this accelerating change?

ROI Demanded

At the same time have to
continually fight for resources and
justify ROI of everything you do?

We Need a Different Conceptual Approach



Digital Adoption is not about teaching employees how to use software –

It's about making employees productive by better utilizing software and employee time

For Reaching The Digital Promise We Need a Paradigm Shift

Train the **software to adapt to users**
rather than forcing **users to adapt to**
software



Why is DAP Different?

Discover why a digital adoption
platform is a game changer

Generally Accepted Model For Workplace Learning

70

Hands On Learning

- Actual Doing

20

Learn From Others

- Coaching or mentoring
- Office Hours

10

Formal Learning

- Instructor-led training
- eLearning
- Simulation employee training
- Role-playing
- Webinar

Let's begin by exploring an example of a business process.

An Account Manager named Rebecca, works for Jacobs Steel. Rebecca receives an email from a partner of theirs, ACME Steel Consultants, that ACME just secured a new order for Jacobs Steel.

All Rebecca needs to do is process the order.

A top-down view of several pairs of hands in business attire writing on a light-colored wooden table. The hands are positioned around the perimeter of the frame, with some writing visible on the table surface. The entire image is overlaid with a semi-transparent red filter.

**Let's look at what Rebecca
wishes the process was.**

- 
- A top-down view of several people's hands and forearms as they write on a light-colored wooden table. The image is semi-transparent, serving as a background for the text.
1. **Click Account.**
 2. **Search for the Account Placing an Order.**
 3. **Click on “New Order”.**
 4. **Select the Product.**
 5. **Review and press Save when done!.**



**Let's look at what the
actual business process
looks like.**

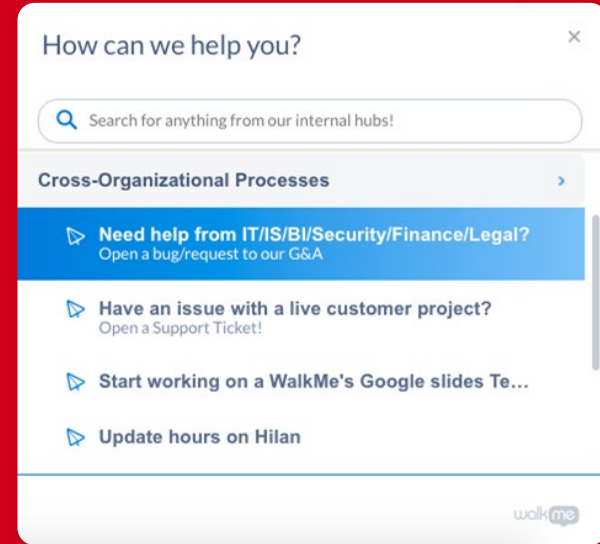
1. What Product are we selling?
2. Was this order referred by a partner?
 - a. [IF YES]
 - i. Partner deals need to be processed for revenue recognition
 - ii. Which Partner referred the order?
 1. [IF ACME SELECTED]
 - a. Enter the ACME rate
 2. [IF Empire SELECTED]
 - a. Enter Empire rate
 3. [IF Arrow Tech SELECTED]
 - a. Enter Arrow Tech rate
 - iii. [IF NO]
 1. What Type of Account is this?
 - a. [IF CURRENT ACCOUNT]
 - i. Take User to Current Customer Page
 - ii. Current Account IDs can be found here
 - iii. Click current account toggle
 - iv. Hover Account ID field
 - v. Enter Account ID here
 1. [IF ACCOUNT ID ENTERED INCORRECTLY]
 - a. Enter in account ID
 - i. You can find IDs here
 - b. [IF NOT CURRENT ACCOUNT]
 - i. Enter new ID
 - ii. Does new account require PO?
 - b. Does new account require PO?
 - i. [IF YES]
 1. Click PO Tracker for User
 2. Click Security Protocol section
 3. Paste in customers PO Insertion ID
 3. Click Submit Order
 4. Order successfully processed

The background of the slide is a solid red color. Overlaid on this red background is a faint, semi-transparent image of several pairs of hands in business attire (sleeves and cuffs visible) writing on a light-colored wooden surface. The hands are positioned at the top and bottom edges of the frame, with some writing visible on the surface.


How can we help Rebecca in the moment of need?

Smart Walk-Thru

With this Step-by-step on-screen guidance at the moment of need so that Rebecca can complete any process, successfully and self-sufficiently.



What if Rebecca needs help at this stage of processing the order?

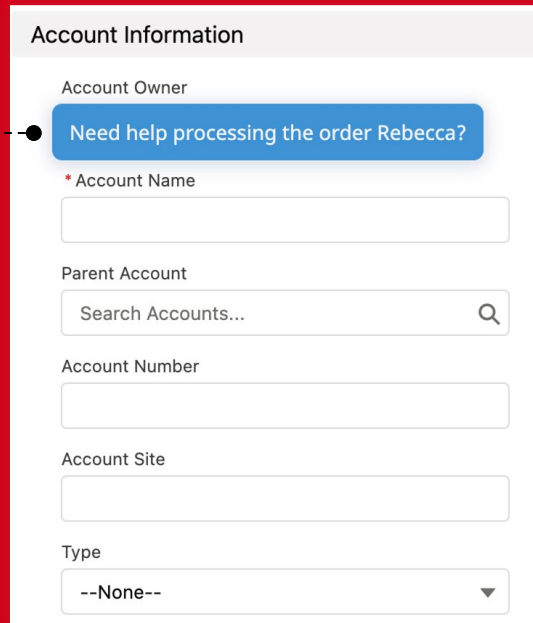


1. What Product are we selling?
2. Was this order referred by a partner?
 - a. [IF YES]
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Launchers

- **What is it?** Buttons placed on a page to trigger other WalkMe applications and to provide access to other assets, contextually
- **How are WalkMe Launcher buttons unique?** They require no coding, they can pull in dynamic text (for example, the button can include a user's name, lift text from the page, etc), they can start guidance from any point in a Smart Walk-Thru, they can match the UX of any underlying application

Rebecca can click on this button to **start the Smart Walk-Thru** from the "What Type of Account is this" step



Account Information

Account Owner

Need help processing the order Rebecca?

* Account Name

Parent Account

Search Accounts...

Account Number

Account Site

Type

--None--

What if Rebecca is unsure what Account Type it should be listed as OR tries to skip putting in the Insertion ID?

1. What Product are we selling?
2. Was this order referred by a partner?
 - a. [IF YES]
 - i. Partner deals need to be processed for revenue recognition
 - ii. Which Partner referred the order?
 1. [IF ACME SELECTED]
 - a. Enter the ACME rate
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SmartTips

- **What is it?** Contextual tooltips placed on-screen to display information and to validate user input on fields that often cause errors in your underlying application
- **How are WalkMe SmartTips Unique?** They require no coding, can provide error and/or success messages to users, can perform data validation, can contain images, gifs, or link to any other help content (WalkMe OR any external resources such as KB articles, videos, etc.)

Rebecca can hover the question mark icon to gain clarity on how to list the Account Type. If she tries to skip adding a PO number, she will be told it's required.

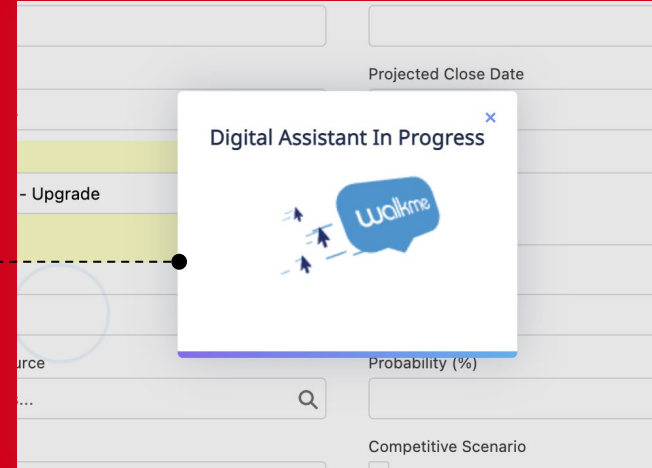
The top screenshot shows a 'Create' form with a tooltip for 'Account Type' that says 'Account Type descriptions can be found [here](#)'. A question mark icon is visible next to the 'Account Type' dropdown menu. The bottom screenshot shows a 'Billing Cycle' form with a red error message 'Please fill in this field' and an 'Insertion ID' field.

What if Rebecca did not want to have to go through all of the steps that could be automated?

1. What Product are we selling?
2. Was this order referred by a partner?
 - a. [IF YES]
 - i. Partner deals need to be processed for revenue recognition
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Attended User Automation

- **What is it?** Reducing user intervention with your website or application with just a click
- **How is WalkMe Automation Unique?** It requires no coding and can click, input text, hover or focus on behalf of the user.



Rebecca can rely on WalkMe to automate empty clicks or redundant steps

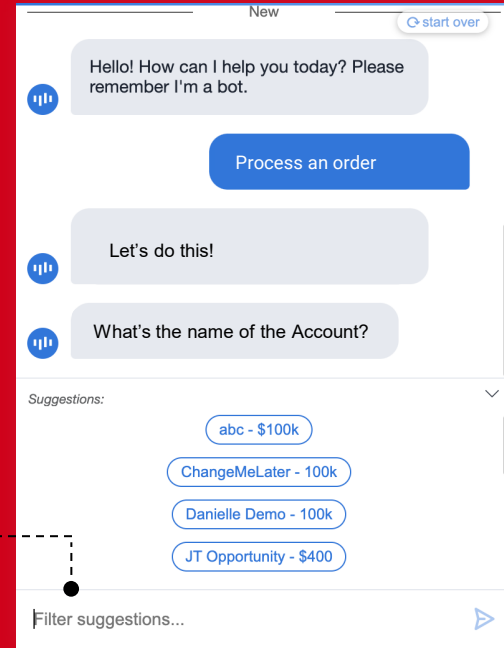
What if Rebecca prefers this entire process to be a simple conversation like her personal assistant, Alexa or Siri?

1. What Product are we selling?
2. Was this order referred by a partner?
 - a. [IF YES]
 - i. Partner deals need to be processed for revenue recognition
 - ii. Which Partner referred the order?
 1. [IF ACME SELECTED]
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Natural Language Attended Automation

- **What is it?** Reducing user intervention with your website with just a click
- **How is WalkMe Automation Unique?** It requires no coding and can click, input text, hover or focus on behalf of the user.

Rebecca can have a conversation with WalkMe's ActionBot to process the order she received





**How do we identify
where guidance is
needed?**

Overall System Utilization

All Sessions



Last 7 Days

Oct. 25, 2018 - Oct. 31, 2018

Users On Monitored Systems

1,153

80% of all users



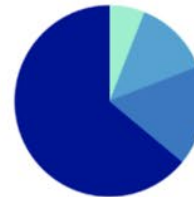
Top 5 used systems by activity time

- Workday
7.5 Hours a day
- Expensify
3.5 Hours a day
- Salesforce
1 Hour a day
- Zoom
0.75 Hours a day
- Zendesk
1 Hour a month



WalkMe Interaction Per User

- 64% - +20 Interactions
- 18% - 10-20 Interactions
- 12% - 5-10 Interactions
- 6% - 0-5 Interactions



Monitored Systems



Search...

System	Active Users (of All Users) ▾	Weekly Usage Per User	Utilisation Score	Processes Started (Completion Rate)	WalkMe Availability	WalkMe Adoption
Workday	1,153 (80%)	2 hours		7,842 (23%)		
Expensify	546 (38%)	0.4 hours		2,583 (48%)		
Salesforce	540 (37%)	23 hours		3,751 (68%)		
Zoom	250 (17%)	3 hours		1,093 (12%)		
Zendesk	193 (13%)	12 hours		1,279 (21%)		

Funnels

① Full interaction data collection starts for each Tracked Event once it is defined. [Read more.](#)

+ NEW FUNNEL



Processing an Order

Single Session

Entire Date Range

All Sessions

Last Month

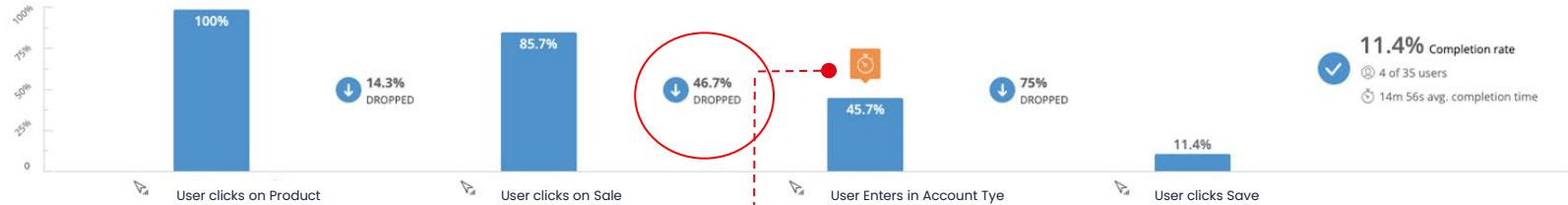
Sep 1, 2021 - Sep 30, 2021

vs.

Choose Filter

Choose Period

% of Users



WalkMe can tell you when a certain step is taking a relatively long time to complete for Rebecca who is processing the order

Account

Completion

56% Popularity
22.9% Completion
73% Submission Error
65 Field Errors

Time

16s Completion
0s Submission Error
1:12m Cancellation

Benchmarks



Clicks Errors Time Spent

20-60 60-120 120-150

Account

194 seconds

Choose Existing

Account Search

Choose Existing

Choose Existing

Converted Status

Cancel Convert

WalkMe's UI intelligence will show which fields users spend the most time on, where user errors are most often made AND benchmark it against others in the G2K & WalkMe customer base

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* Account Name

Parent Account

Search Accounts...

Account Number

Account Site

Type

--None--

Processing an Order

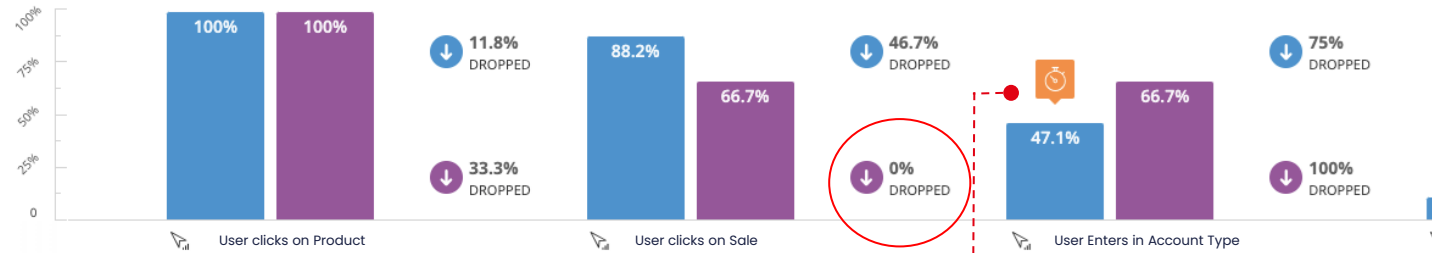
All Sessions Last Month
Sep 1, 2021 - Sep 30, 2021

VS.

Account Type SmartTip hovered Last Month
Sep 1, 2021 - Sep 30, 2021

[Clear comparison](#)

% of Users



WalkMe allows you to compare and contrast user groups (All Sessions vs Sessions where Users used the Account Type SmartTip) to test if your WalkMe guidance is impactful



You Now Have Defensible Impact.

Education professionals can deliver real,
measurable results automatically

WalkMe design principles based on 500b events in 2020

21B

Times WalkMe was used by users as they engaged with their technology platforms

38m

Users leveraged WalkMe automation in their process completion

62%

Of users abandon executing a business process at ½ way point

300m

User sessions reverse engineered to better understand friction points

154hrs

A week saved by users where automation is leveraged

<1%

Of users use content placed in the onboarding tasks or widget

900m

Users leveraged WalkMe in 2020 to help complete a business process

90%

Of process guidance is triggered mid-process (Up from 51%)

386sec

To complete a digital form



Call to Action.

What to do next

WalkMe **Beyond**



The DAP professionals community is growing:

3000+

DAP professionals
on LinkedIn

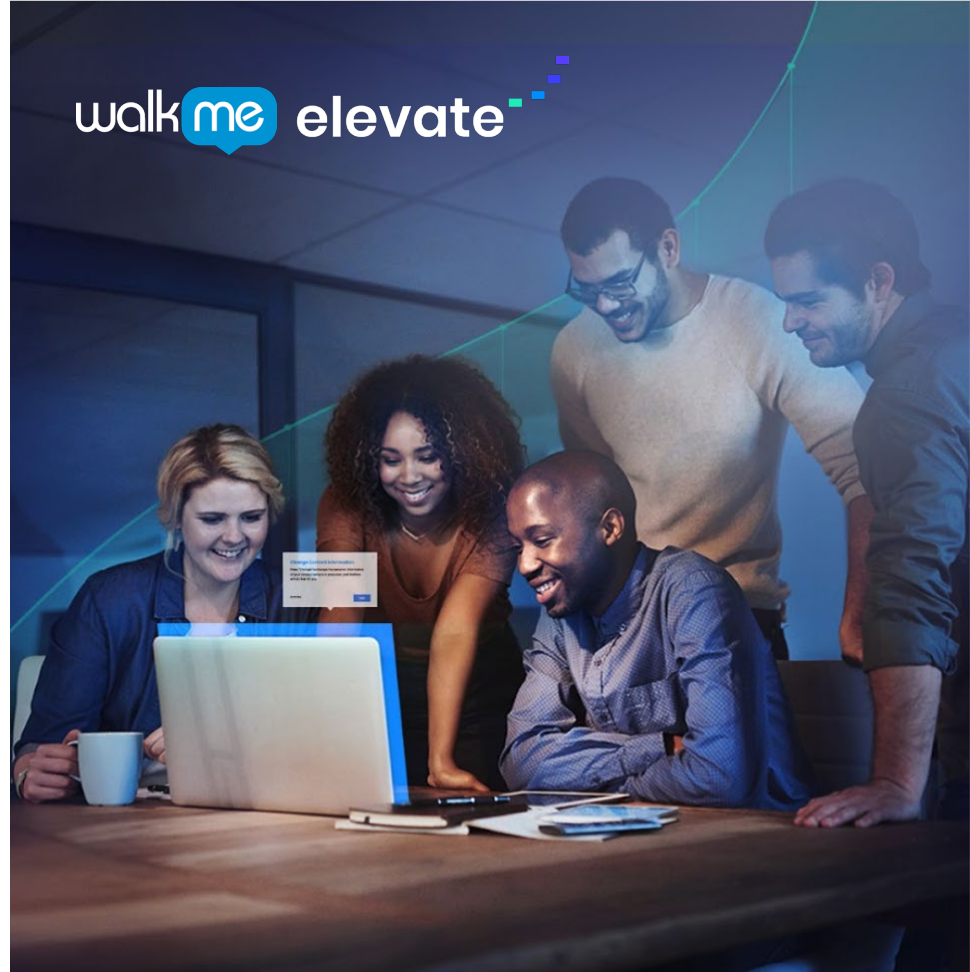
1160+

registrants to
our Elevate Event

At WalkMe Elevate, we will celebrate DAP Professionals and help them get inspired to lead DAP initiatives, strengthen their implementations and up-level their careers within DAP.

Attendees will walk away with:

- Strategies to help lead their company's DAP initiatives
- Ways to elevate their company's WalkMe usage
- Technical best practices across a variety of use cases, features & functionality



Core Governance Roles

A critical factor in ensuring your organization's long-term success with DAP is allocating **internal resources** dedicated to digital adoption. There are three role profiles that are recommended:



Business Owner

Partners with a DAP Manager to drive and measure impact within their business unit



DAP Manager

Organizes information, builds the business case, prioritizes, shows results



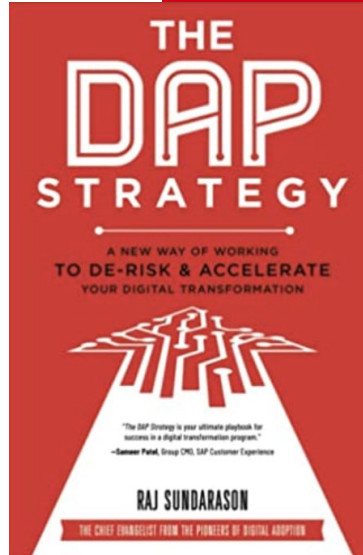
Builder

Designs and develops WalkMe solutions

Additional DAP Resources

Digital Adoption Institute

The Digital Adoption Institute is a professional organization, established by WalkMe with the mandate of advancing the profession of digital adoption through vocational certifications, executive education, and field research.



Train Software, Not People

How Digital Adoption Has Changed The Game... Forever

Wayne McCulloch

Chief customer Officer