

LEARNING MADE EASY

2nd WalkMe Special Edition

# Digital Adoption

for  
**dummies**<sup>®</sup>  
A Wiley Brand



Learn about  
digital adoption

Understand how AI can  
optimize workflows

Drive value with a digital  
adoption platform

Brought to  
you by

walk**me**

Steve Kaelble

# About WalkMe

WalkMe built the leading AI-driven Digital Adoption Platform so companies can effectively navigate change brought on by technology. WalkMe sits on top of an organization's tech stack, identifies where people experience friction, and delivers the personalized guidance and automation needed to get the job done, by workflow, and in the flow of work.



# Digital Adoption

2nd WalkMe Special Edition

**by Steve Kaelble**

**for  
dummies®**  
A Wiley Brand

# Digital Adoption For Dummies®, 2nd WalkMe Special Edition

Published by  
**John Wiley & Sons, Inc.**  
111 River St.  
Hoboken, NJ 07030-5774  
[www.wiley.com](http://www.wiley.com)

Copyright © 2024 by John Wiley & Sons, Inc., Hoboken, New Jersey. All rights, including for text and data mining, AI training, and similar technologies, are reserved.

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning or otherwise, except as permitted under Sections 107 or 108 of the 1976 United States Copyright Act, without the prior written permission of the Publisher. Requests to the Publisher for permission should be addressed to the Permissions Department, John Wiley & Sons, Inc., 111 River Street, Hoboken, NJ 07030, (201) 748-6011, fax (201) 748-6008, or online at <http://www.wiley.com/go/permissions>.

**Trademarks:** Wiley, For Dummies, the Dummies Man logo, The Dummies Way, Dummies.com, Making Everything Easier, and related trade dress are trademarks or registered trademarks of John Wiley & Sons, Inc. and/or its affiliates in the United States and other countries, and may not be used without written permission. WalkMe and the WalkMe logo are registered trademarks of WalkMe. All other trademarks are the property of their respective owners. John Wiley & Sons, Inc., is not associated with any product or vendor mentioned in this book.

LIMIT OF LIABILITY/DISCLAIMER OF WARRANTY: THE PUBLISHER AND THE AUTHOR MAKE NO REPRESENTATIONS OR WARRANTIES WITH RESPECT TO THE ACCURACY OR COMPLETENESS OF THE CONTENTS OF THIS WORK AND SPECIFICALLY DISCLAIM ALL WARRANTIES, INCLUDING WITHOUT LIMITATION WARRANTIES OF FITNESS FOR A PARTICULAR PURPOSE. NO WARRANTY MAY BE CREATED OR EXTENDED BY SALES OR PROMOTIONAL MATERIALS. THE ADVICE AND STRATEGIES CONTAINED HEREIN MAY NOT BE SUITABLE FOR EVERY SITUATION. THIS WORK IS SOLD WITH THE UNDERSTANDING THAT THE PUBLISHER IS NOT ENGAGED IN RENDERING LEGAL, ACCOUNTING, OR OTHER PROFESSIONAL SERVICES. IF PROFESSIONAL ASSISTANCE IS REQUIRED, THE SERVICES OF A COMPETENT PROFESSIONAL PERSON SHOULD BE SOUGHT. NEITHER THE PUBLISHER NOR THE AUTHOR SHALL BE LIABLE FOR DAMAGES ARISING HEREFROM. THE FACT THAT AN ORGANIZATION OR WEBSITE IS REFERRED TO IN THIS WORK AS A CITATION AND/OR A POTENTIAL SOURCE OF FURTHER INFORMATION DOES NOT MEAN THAT THE AUTHOR OR THE PUBLISHER ENDORSES THE INFORMATION THE ORGANIZATION OR WEBSITE MAY PROVIDE OR RECOMMENDATIONS IT MAY MAKE. FURTHER, READERS SHOULD BE AWARE THAT INTERNET WEBSITES LISTED IN THIS WORK MAY HAVE CHANGED OR DISAPPEARED BETWEEN WHEN THIS WORK WAS WRITTEN AND WHEN IT IS READ.

For general information on our other products and services, or how to create a custom *For Dummies* book for your business or organization, please contact our Business Development Department in the U.S. at 877-409-4177, contact [info@dummies.biz](mailto:info@dummies.biz), or visit [www.wiley.com/go/custompub](http://www.wiley.com/go/custompub). For information about licensing the *For Dummies* brand for products or services, contact [BrandedRights&Licenses@wiley.com](mailto:BrandedRights&Licenses@wiley.com).

ISBN: 978-1-394-26392-9 (pbk); ISBN: 978-1-394-26393-6 (ebk); ISBN: 978-1-394-28366-8 (ePub). Some blank pages in the print version may not be included in the ePub version.

## Publisher's Acknowledgments

Some of the people who helped bring this book to market include the following:

**Project Manager and Editor:**  
Carrie Burchfield-Leighton  
**Sr. Managing Editor:** Rev Mengle

**Acquisitions Editor:** Traci Martin  
**Client Account Manager:**  
Jeremith Coward

# Table of Contents

**INTRODUCTION** ..... 1

- About This Book ..... 1
- Foolish Assumptions ..... 2
- Icons Used in This Book..... 2
- Beyond the Book..... 2

**CHAPTER 1: Operating in a Fragmented Environment**..... 3

- Navigating Multiple Systems..... 4
- Battling the Frankenstack..... 6
- Trying Out Solutions ..... 6
- Seeing AI in Use ..... 8
- Exploring a New Approach..... 9

**CHAPTER 2: Rethinking the Whole Approach**..... 11

- Painting the Strategic Big Picture ..... 12
- Tracking Down What’s Inhibiting Adoption..... 13
- Increasing Employee Productivity ..... 13
- Creating a Better User Experience ..... 14
- Using AI to Improve Processes ..... 15
- Unlocking the Full Potential of Your Business ..... 16
- Strengthening the Organization ..... 17

**CHAPTER 3: Exploring the WalkMe Solution**..... 19

- Navigating the Tech Ecosystem ..... 19
- AI for Everyone ..... 21
- Satisfying All Employees ..... 23

**CHAPTER 4: Ten Ways WalkMe Helped** ..... 25

- Tasting Digital Adoption Success..... 25
- Enabling a Healthy Workplace ..... 26
- Selling with Confidence ..... 26
- Learning with Ease ..... 27

Seeing the Beauty in Technology ..... 27

Making Nice Music ..... 27

Banking on Tech Adoption ..... 27

Conversing Globally ..... 28

Helping Customers Succeed ..... 28

Building Excellence..... 28

# Introduction

**D**igital 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.

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 tech leaders 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, instructions, and requirements, and applications seem to be ever-changing. And as artificial intelligence (AI) revolutionizes work, it also brings complications and risks that employees may overlook.

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 easy to adopt them all? What if this system could take advantage of AI capabilities *and* help you implement AI solutions? This book helps answer those questions.

## About This Book

*Digital Adoption For Dummies*, 2nd 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. You also find out 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 intro to the problems thwarting digital adoption and the 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 in a hurry, don't miss the takeaways in the paragraphs next to the Remember icons.



TIP

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



WARNING

Digital transformation can go wrong in many ways, and the Warning icons point 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](http://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.

## IN THIS CHAPTER

- » Dealing with multiple disparate systems
- » Confronting a technological monster
- » Seeking fixes and finding multiple answers
- » Seeing the ups and downs of AI
- » Dreaming of a better way forward

# Chapter 1

# Operating in a Fragmented Environment

**D**igital 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, and 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 and ensure they're adopted in a way that truly adds value. It explores how your tech stack can become a horror story and outlines how easy it is to miss problems and get bogged down in creating ineffective solutions. It also discusses artificial intelligence (AI) — more specifically, generative AI — and why your organization must get a handle on it and gain full visibility of how it's being used. Although parts of this chapter may sound like you're in a nightmare, 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 2027, spending on digital transformation will be almost \$4 trillion. WalkMe research suggests a typical large enterprise might spend a hundred million dollars on digital transformation and software, and that same research finds two-thirds of enterprises face incredible pressure to transform even faster than they already are.

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.

One study found that more than two-thirds of digital transformations fall short of their objectives. For many, a disheartening gap exists between the introduction of technology and the ability to realize the expected value. People go in thinking they're supercharging their operations but end up with new points of friction in key workflows in departments such as sales, human resources, and information technology.

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. It often isn't really a problem with the technology or your people but is essentially an issue with change management.

Think of a sales representative as an example. Your organization may have adopted several new software technologies in recent years to help your sales reps succeed, including

- » A customer relationship management (CRM) system to manage interactions with existing and potential customers (think Salesforce, SAP, or Oracle)
- » A comprehensive knowledge base with vital information about products and services
- » Applications such as DealHub or Confluence to help automate quoting
- » Systems to digitize the legal processes (think DocuSign and Adobe Sign)
- » Invoicing software such as NetSuite or SAP Concur



REMEMBER

That's a whole lot of systems and platforms and applications — all of which are incredibly useful and powerful. The average organization uses 1,900 business processes that are continuously updated with new ways of working. And on top of all that, your team is continuously improving internal workflows. But face it, that's a 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. It's a change-management nightmare. It also makes it incredibly difficult to effectively measure software ROI.

# 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. Organizations are also overwhelmed because they have to deal with a constantly growing and evolving 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 then there are the overwhelmed users trying to use the technology to operate key workflows of the business.

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? 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.

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*, in which a scientist creates a being from many disparate parts. Although 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.

## Trying Out Solutions

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 may be on 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.

Did you hire your employees to master systems or to get their jobs done? 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, especially when those systems are integrated into a single workflow.

Beyond training, organizations may adopt 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 help manage workflows.

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, but they only address issues with individual applications without worrying about the business processes they are integrated with.



TIP

Consider whether you're building integrated solutions or if you're merely gluing existing apps together. Will you end up with a truly workflow-centric answer or bandages and glue ware linking existing applications without addressing integrated business processes? Will you be tapping into your LMS, or perhaps building in guidance that pops up while the user is in the application itself?

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 makes some improvement. They're small steps that start you down the path in an incremental way, but there's still a long way to go to reach the destination.

# Seeing AI in Use

When looking at new innovations in digital transformation, AI has brought enterprises powerful capabilities that have already been integrated, and the surface of the possibilities is only beginning to be scratched. That said, the opportunities of AI do bring potential risks that smart enterprises need to keep in mind. Companies need to gain full visibility into what AI applications are in use now, who's adopting them, and how.

You need that visibility whether the company has formally acquired and implemented generative-AI-powered solutions just yet. The fact that there are consumer options out there now means some employees may be taking matters into their own hands and giving them a spin, for company business.

Part of the need here has to do with the fact that many folks don't inherently know how to use AI responsibly. It's magical, it's fun, and it seems incredibly powerful and smart — and it's easy to forget that it may not be as all-knowing as it seems. While exploring the benefits, your teams need to know AI's limitations and always keep them in mind.

And the potential to be biased or downright wrong is just part of the danger. The average human who's new to AI likely has no idea how improper use can put data at risk. Confidential information doesn't belong anywhere near some AI solutions, especially those open to the public. Just plugging in a query or prompt may inadvertently expose data that should be kept secure.

Beyond that, today's AI use cases face the same risk that applies to all digital transformation. Without a way to effectively manage how AI tools are being used, it's impossible to gauge their effectiveness. The sky is seemingly the limit when it comes to the potential value of AI, and it's all too easy to leave a lot of that value untapped. AI tools and best practices need to be built into the flow of work, and that doesn't just happen on its own.

# Exploring a New Approach

Employees have struggled to fully adopt new technologies for years, but the problem is only getting worse. Many people are now working in hybrid environments or remotely, adding to the challenge, and more technology changes are coming with generative AI.



REMEMBER

Your organization needs a new approach to easing the burden and fully leveraging the capabilities of your technologies while seamlessly navigating through change-management programs. The big picture goes far beyond adopting some applications more successfully. The 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-fruitleful 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 and regardless of the tool they're using or the platform on which their technologies live. That better approach would result in mission-critical workflows working as intended across every corner of the enterprise, dramatically improving completion of employees' day-to-day tasks. 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 and the performance of critical workflows. Any insights gained would then guide actions to create better user experiences and drive greater technology adoption. 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. This would be especially helpful in analyzing how people use specific software, their software pain points, and whether they're using applications to their fullest potential in critical workflows.

From an HR perspective, a better approach offers new ways to interact with the workforce and get them to fully benefit from HR applications that seem to change constantly. It eases 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, too. Automating CRM best practices, for example, will boost sales execution and other key sales workflows. 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

For IT, a better digital transformation approach would mean fewer support calls, troubleshooting, and problem solving. This approach would also help IT teams to pinpoint software pain points and optimize solutions. That would translate into more positive results while also driving down costs. 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, remember that every failure is an opportunity for improvement. If complexity is preventing effective software adoption, that means there's a whole lot of room for improving ROI.

#### IN THIS CHAPTER

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

## Chapter 2

# Rethinking the Whole Approach

**T**he 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 how to optimize workflows and uncover new opportunities. You explore how better adoption means more productive employees and more positive user experiences and look into how artificial intelligence (AI) can help facilitate a more successful transformation. This chapter also 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 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 workflows, not just individual software applications.

Looking at the big picture should include an understanding of software usage and user experiences across all business processes and workflows. 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 vital for 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 chief information officers (CIOs) insights into whether the organization is getting the most return on all 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 workflow 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 across key workflows. 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. Remember, you can't manage what you can't measure, and you can't improve what you can't manage — better visibility makes a world of difference.

## 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 workflows 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.

# Using AI to Improve Processes

Better digital adoption sounds pretty magical, and I haven't even told you about the magic that so many people are talking about these days — the ways that AI can be a game-changer.

Digital adoption can shift into high gear when you put AI on the job. Imagine getting AI-enabled recommendations on how to improve the user experience across key workflows. In particular, improved digital adoption puts the spotlight on those places where there's low engagement, where error rates are high, or where employees are getting bogged down by mundane and time-consuming tasks.

An AI-enabled digital adoption solution can arm you with helpful (and occasionally stunning) statistics, like the percentage of users who got hung up on a particular spot in the workflow, how much time they wasted on average, and how many gave up and abandoned the task. With the help of AI, your organization can really focus its time and money on the places that need the most help, dramatically increasing productivity.

A key to digital transformation is providing guidance right at the pain points, with in-app tips that help users figure things out and zip through tasks more smoothly. That said, someone needs to create that guidance and put it into place.

Imagine now having AI assistance in that work, too. A super-powerful digital transformation approach embeds AI to help with the work of writing and styling that guidance, speeding up content creation. It can write or improve copy and also automate such processes as creating visuals and charts and illustrations. It can even create segmentation rules.



TIP

But even that is just the tip of the iceberg. Anyone who has played around with a consumer AI solution knows the power of natural language conversation. Imagine workflows that your teams can simply talk to, in regular language — and then the transformation solution takes the wheel and plugs details into forms or sets up other actions that finish the job. Powerful stuff, right?

Conversing with AI can yield quick knowledge retrieval for your employees. For example, they can simply ask what the per diem policy is and get an answer, without sifting through applications

and knowledge bases. AI can be sure employees are entering the right kinds of information into free-text fields, using the right kinds of language.

In case the revolutionary nature of that didn't quite hit you, let me get a bit more specific. Your sales team may maintain all of its key information in an app such as Salesforce. A salesperson uses natural language to talk to a digital adoption platform's AI-powered interface, telling it that she just had a great meeting with the Mega-Great Co., and that they want to sign a \$100,000 contract in 30 days. The AI, based on its past experiences, recognizes that this is info that needs to be plugged into Salesforce, so it launches Salesforce and automatically types in the info — all the salesperson has to do is confirm it.

Or perhaps an employee wants to update some personal information of the kind that the HR department maintains. That employee opens up the same AI-powered interface and tells it to change his address and update his emergency contact. The digital adoption platform understands what needs to be done, opens up the HR software and enters the new info in the right place. Again, all that's left is for the employee to confirm the action.



REMEMBER

Long story short, when you really tap into the power of AI, digital adoption becomes much more than helping humans become better users of technology. It turns the tables and becomes a means for helping technology figure out how to better serve humans.

## 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 work your organization hired them to do, not just getting ready to do that work.

Even more important, when your organization fully adopts its digital tools, 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 may 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. When the work-from-anywhere concept started to really emerge in recent years, many companies put in place adoption solutions designed to work as well in the home office as in the traditional work environment.

That went from a great idea to a must-have when the COVID-19 pandemic arrived in 2020. The pandemic quickly turned work-from-home into a new normal. Now, even though the pandemic has faded, that new normal remains.

The companies that continue to fare the best even after the pandemic are the ones that have onboarded new cloud technologies, collaborative solutions, and other advances that have streamlined change management and helped their dispersed workforces prosper even as they continue to work in dispersed locations.

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.

- » Managing tech ecosystem changes
- » Delivering AI for everyone
- » Helping employees at all levels

# Chapter 3

## Exploring the WalkMe Solution

There's a lot of talk about how generative artificial intelligence (GenAI) can boost productivity, optimize workflows, and increase employee satisfaction, but improper usage and a lack of employee know-how mean that only a fraction of the workforce is actually using these tools. In this chapter, you discover how WalkMe<sup>x</sup> provides AI assistance that's proactive, accessible, and actionable across any application, enabling every employee to utilize this revolutionary technology.

### Navigating the Tech Ecosystem



REMEMBER

Most of today's copilots follow a pull model that requires you to seek out AI and give it the context to help you. But what happens if employees don't know how to prompt AI? Businesses don't realize the full promise of GenAI due to

- » Lack of employee readiness to take full advantage of new tools
- » Disjointed user experiences because employees need to use multiple copilots for their daily workflows

- » Little to no visibility into performance gains due to a lack of contextual awareness

For organizations that are unable to solve these problems, a lot is at stake:

- » **Unrealized productivity gains:** GenAI has the potential to streamline workflows and accelerate output. However, if only a small percentage of the workforce adopts AI tools, the transformative productivity gains organizations invest in will remain unrealized.
- » **Increased security and compliance risks:** When most employees don't use sanctioned AI, risks skyrocket. Shadow AI usage, accidental misuse of tools due to undertraining, and a lack of overall visibility create vulnerabilities and compliance headaches for IT leaders.
- » **Competitive disadvantage:** Companies unable to drive wide adoption of GenAI may find themselves unable to keep up. Competitors leveraging streamlined, AI-powered workflows outpace them in innovation, speed-to-market, and customer responsiveness.



TIP

The key to unlocking the full potential of GenAI lies in a human-centered approach. Organizations need solutions that empower all employees to integrate AI into their daily workflows — including change management programs that focus on education and guidance. Contextual awareness — understanding who the users are, their roles and functions, what they're most likely trying to accomplish, and what workflow they're engaged in — is crucial. With contextual awareness, AI becomes

- » **Proactive**, surfacing itself in the right place and the right time, removing the burden of seeking out assistance
- » **Accessible**, ensuring that no matter the user's technical skill or level of comfort, AI offers a helping hand to every person
- » **Actionable**, recommending relevant next steps tailored to users and what they're trying to do — and executes them automatically or takes them to where they can execute it themselves

# AI for Everyone

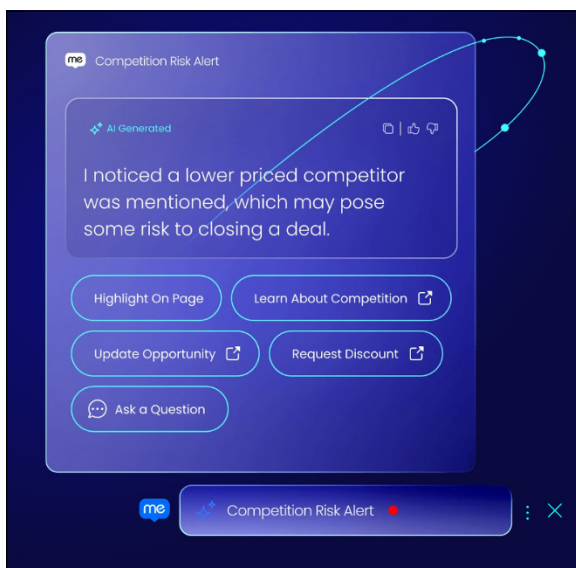


REMEMBER

WalkMe<sup>x</sup> is a new breed of copilot that offers always-on AI assistance without any prompting or app-switching. It includes a conversational interface that people can call up on demand. WalkMe<sup>x</sup> enables text-to-action, serving up next-best actions across any application and workflow. WalkMe<sup>x</sup> can execute those tasks automatically or take people to guided experiences where they can execute them together.

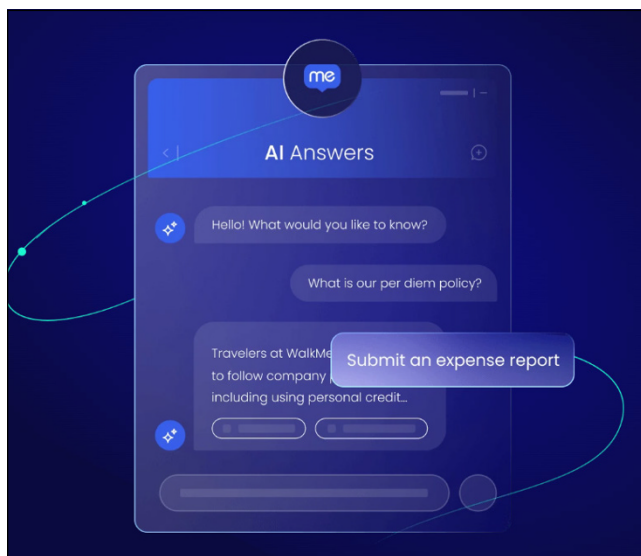
*Always-on assistance* offers AI capabilities pushed to end-users directly by WalkMe<sup>x</sup>. As your workforce executes its day-to-day tasks across workflows, WalkMe<sup>x</sup> sits steadfast by their side processing context. It understands what's happening on the screen, including what your users are trying to do, and vigilantly looks for opportunities to volunteer help. This is proactive AI, which makes AI accessible and actionable for all users across the organization.

If you're in Sales, WalkMe<sup>x</sup> can detect competition in an email, shown in Figure 3-1, and recommend next best actions, such as updating the customer relationship management (CRM) system or summarizing competitive sales assets to brush up on the competition on the spot.



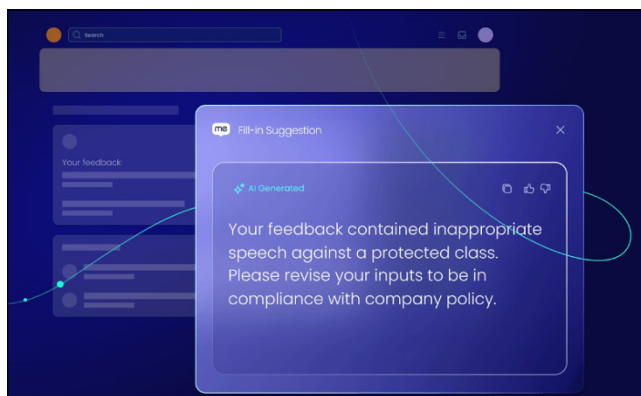
**FIGURE 3-1:** Detecting competitors that may pose business risks.

For HR folks, WalkMe<sup>x</sup> can detect inappropriate speech within inputs across performance reviews or candidate feedback and recommend adjustments to ensure compliance is followed. An example is shown in Figure 3-2.



**FIGURE 3-2:** Helping HR with focused speech to stay compliant.

And if you work in IT, WalkMe<sup>x</sup> can detect users struggling with software access and launch troubleshooting processes or automate submitting support tickets. An example is shown in Figure 3-3.



**FIGURE 3-3:** IT can use WalkMe<sup>x</sup> for support tickets.

Other than always-on assistance, WalkMe offers

- » **On-demand assistance:** AI capabilities are pulled by end-users served by WalkMe<sup>x</sup>, which provides access to all the standard generative AI skills coming to market today but with a unique bonus. Only WalkMe<sup>x</sup> is connected back to digital adoption guidance, empowering users to not only seek information but also act on it.
- » **Conversational search:** WalkMe<sup>x</sup> offers a generative chat experience for your users, allowing them to semantically search for the business-critical information they seek across any content or data repository you connect to WalkMe<sup>x</sup>. The WalkMe<sup>x</sup> copilot can also surface traditional WalkMe content like Launchers and Smart Walk-Thru to guide users through next steps.
- » **Assistive reading:** When users highlight text on their screens, WalkMe<sup>x</sup> offers an array of actions, such as summarizing information and generating key takeaways.
- » **Assistive writing:** As users begin drafting inputs within any text-based user interface (UI) element, WalkMe<sup>x</sup> offers an array of actions, such as generating first drafts and changing length and tone.

## Satisfying All Employees



REMEMBER

WalkMe's core functionalities provide the means required to maximize software investments. WalkMe serves the needs of people at all levels of your organization who use digital tools or oversee their implementations. It boosts digital adoption initiatives, ultimately driving business outcomes:

- » For **IT 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. It's a key for optimizing software investments, helping leaders realize the full potential of their tech stack and make sure critical workflows are running as intended.

- » For **risk management watchdogs**, WalkMe adheres to a boatload of global compliance regulations that go by several alphabets' worth of acronyms. Does your organization live by a stringent compliance standard? WalkMe lives by that standard, too. Along that road, the solution enforces secure access to make enterprise governance comparatively painless. Audit logs keep watch for rogue behavior, and changes can be tracked to keep the environment safe.
- » For **users**, it's always at the ready with information and assistance — answering questions, preventing errors, offering useful guidance, and automating tasks in the flow of work. 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. It makes life easier within applications, but even more important, improves the experience across business workflows in all key areas, from HR to sales to finance to IT to customer care (and more).
- » For **customers**, it improves engagement by simplifying the user experience, which increases customer retention, grows upsell opportunities, and reduces customer support calls.

#### IN THIS CHAPTER

- » Adopting multiple technologies successfully
- » Improving revenues with more accurate billing
- » Selling more with greater technology adoption
- » Helping customers adopt new tech
- » Reducing the need for training and support

# Chapter 4

## Ten Ways WalkMe Helped

Organizations around the world are acquiring new digital technologies at an accelerating pace, yet they're often dissatisfied with the result. 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.

A growing roster of major companies — from Fortune 500 giants to fast-growing smaller firms — use WalkMe's Digital Adoption Platform (DAP), which helps companies effectively navigate change brought on by technology. It sits on top of your organization's tech stack, identifies where people experience friction, and delivers personalized guidance and automation to optimize your business processes in the flow of work. This chapter includes ten real-world case studies of digital transformation success enabled by WalkMe.

## Tasting Digital Adoption Success

A global food and beverage company with more than 225,000 employees and 2,000 brands had a strong technology foundation with a thousand or more applications. But like a lot of companies,

it experienced low software adoption rates, inefficient use of critical applications, and user fatigue while navigating multiple workflows.



**TIP**

WalkMe connected employees with tools such as Success Factors, ServiceNow, Power BI, Concur, and SAP Ariba. Specific use cases included using WalkMe DAP for its hire-to-retire workflows, safe and compliant artificial intelligence, and for identifying shadow IT. The company had more than \$30 million in inferred financial productivity gains in a year and more than 5 million productivity hours gained. Training needs were cut in half, support calls dropped by 93 percent, and task-completion rates in business-critical apps grew by more than 250 percent.

## Enabling a Healthy Workplace

A major healthcare system with more than 45,000 employees chose WalkMe DAP to help its associates learn in the flow of work, enabling teams across the company to better serve patients. Using WalkMe for its invoicing and collections workflows helped the company boost proper billing code usage and improve payment outcomes by a million dollars a month. It also helped roll out new technologies so busy professionals spent less time retraining, and support teams fielded 300 fewer calls a month.

## Selling with Confidence

A materials science company and its 2,000-plus associates weren't embracing the full capabilities of Salesforce. The company wanted to increase user confidence and adoption, while cutting back on the need for training. Implementing WalkMe resulted in a 75 percent reduction in enablement time for new features, an 83 percent reduction in training time, and Salesforce user satisfaction scores grew by 50 percent.



**TIP**

Beyond app adoption, the company uses WalkMe for ongoing system and workflow updates, including for implementing new account and territory planning solutions across its divisions. Rapid adoption saves sales teams hundreds of hours of time, while adhering to sales excellence best practices as they complete territory and planning tasks.

## Learning with Ease

A major statewide community college with a tech stack comprised of dozens of applications turned to WalkMe for several of its student- and staff-facing platforms. As a result, the college cut incorrectly routed student support tickets in half and cut application support tickets by more than half for a key academic program. Through better adoption of technology and fewer errors, users save more than 125,000 hours a year.

## Seeing the Beauty in Technology

A beauty product retailer had trouble with its warehouse replenishment system. Users struggled to trust the system's recommendations, were overriding automatic processes, and ended up with errors and excess inventory. WalkMe enabled customized and simplified app onboarding and inventory management workflows, powered by a transparent overlay. In-app help features now guide users through unfamiliar tasks, building trust in the system and cutting down on support requests. User engagement has hit nearly 97 percent, training costs have dropped 40 percent, and projected annual software return on investment (ROI) is 114 percent.

## Making Nice Music

A well-known group of music labels grew through a lot of acquisitions and partnerships, resulting in a fragmented digital ecosystem. People didn't know what tools were available to them or how to use them. By using WalkMe, the company unified workflows, making common business processes much more efficient. For example, automation and greater adoption cut the time to complete common HR workflows in half.

## Banking on Tech Adoption

A North American banking group needed to ensure that its customers fully understood, embraced, and trusted its digital initiatives. A WalkMe implementation provided in-app guidance that

helped customers tap into new or updated features without major effort or confusion. Customer adoption of new features increased, calls to the support center were cut in half, and development costs decreased.

## Conversing Globally

A medical technology company worked with health systems worldwide and was constantly releasing new features and updates. It onboarded WalkMe for its customer service portal, serving users in more than 80 countries in two dozen languages. The system provides powerful interactive guidance to customers who often manage sophisticated tech at hospitals. It has helped customers locate vital information, discover new software features, and easily submit service tickets.

## Helping Customers Succeed

A major technology provider experienced a lot of user abandonment of its offerings. Onboarding experiences weren't achieving desired results, and support wasn't accessible enough.



TIP

WalkMe DAP helped streamline onboarding and support capabilities, increasing product usage, consumption, and retention by 300 percent. Product adoption increased sixfold, and revenue from digital offerings grew by 80 percent, twice the target.

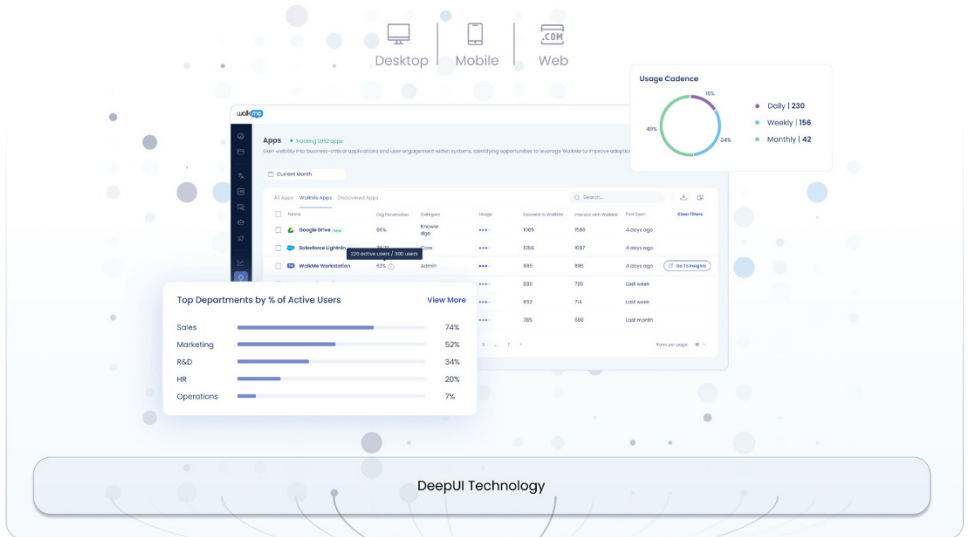
## Building Excellence

A major consulting, audit, tax, and advisory service is always innovating its tools, technologies, and workflows. It's vital that its professionals quickly learn these new tools without wasting valuable client-facing time. The company turned to WalkMe DAP to offer guidance in the flow of the work on new applications. Onboarding is now much smoother, and support tickets are down 30 percent. In addition, WalkMe helps automate processes and simplifies cross-application workflows. The company even developed a DAP Center of Excellence while deploying WalkMe on nearly 100 applications.



# Everything you need to make work flow.

Hundreds of apps across thousands of processes are creating friction in your business. Get the visibility and tools you need to deliver people-first software experiences so you can run better and faster.

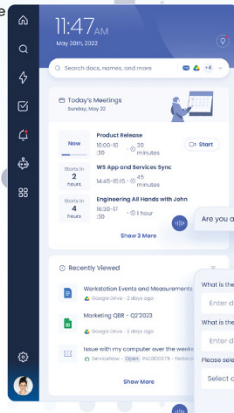


Get a clear view of how workflows and applications are being used in the context of the jobs your people are trying to get done.



Use pre-built integrations with popular enterprise software categories to successfully overcome challenges brought on by technology change.

Deliver a personalized employee hub, where all the necessary tools, workflows, knowledge, and applications are connected in one place.



**What do you need to build your skills?**

Complete the anonymous Skills Survey by December 13 to help us equip you for the evolving landscape of work.

[Take the survey](#) [Remind me later](#)

Deliver seamless experiences that start in one place and pick up wherever users left off on any platform or device.

Automation in progress, your vacation request will be set up shortly. Enjoy it.

# Optimize your digital transformation efforts

Do you ever wonder why your digital transformation efforts fail despite increased software investments? Your issue isn't with technology; it's with change management and understanding how to take a people-first approach to digital adoption. Effective change management means utilizing an enterprise-wide approach to digital adoption that's also tailored to the individual needs of your users. Doing so allows your organization to maximize tech investments while creating a more productive workforce.

## Inside...

- Survey fragmented technology issues
- Learn about AI-powered digital adoption
- Facilitate employee productivity
- Increase customer satisfaction
- Boost your software ROI
- Gain visibility into your tech stack
- Embrace a digital adoption mindset



**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.

Go to **Dummies.com™**  
for videos, step-by-step photos,  
how-to articles, or to shop!

ISBN: 978-1-394-26392-9  
Not For Resale

**for  
dummies®**  
A Wiley Brand



# **WILEY END USER LICENSE AGREEMENT**

Go to [www.wiley.com/go/eula](http://www.wiley.com/go/eula) to access Wiley's ebook EULA.