Designing Digital Adoption Journeys for Large Enterprises

June 20, 2023

Introductions

Working with you side-by-side, every day

Nakita Pattni

Business Development
Manager,
Enterprise Technology
Adoption EMEA

Greisy Flores

Director of Value Realization
& COE Program, Whatfix

Paul Toffis

Head of North America &
EMEA Services Partners,
Whatfix

Agenda

01	Digital Adoption Platform (DAP) 101
02	DAP for large enterprises
03	Designing DAP centers of excellence for large enterprises
04	Practical examples
05	Closing

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Digital Adoption Platform 101

What is a digital adoption platform?

Personalized Onboarding:
Introduce your users to the application with a tour of all key features.

In-App Guidance:
Create interactive, step-by-step tooltips that guide your users across applications.

Self Service:
Provide in-app contextual help to users in the moment of need.

Change Management:
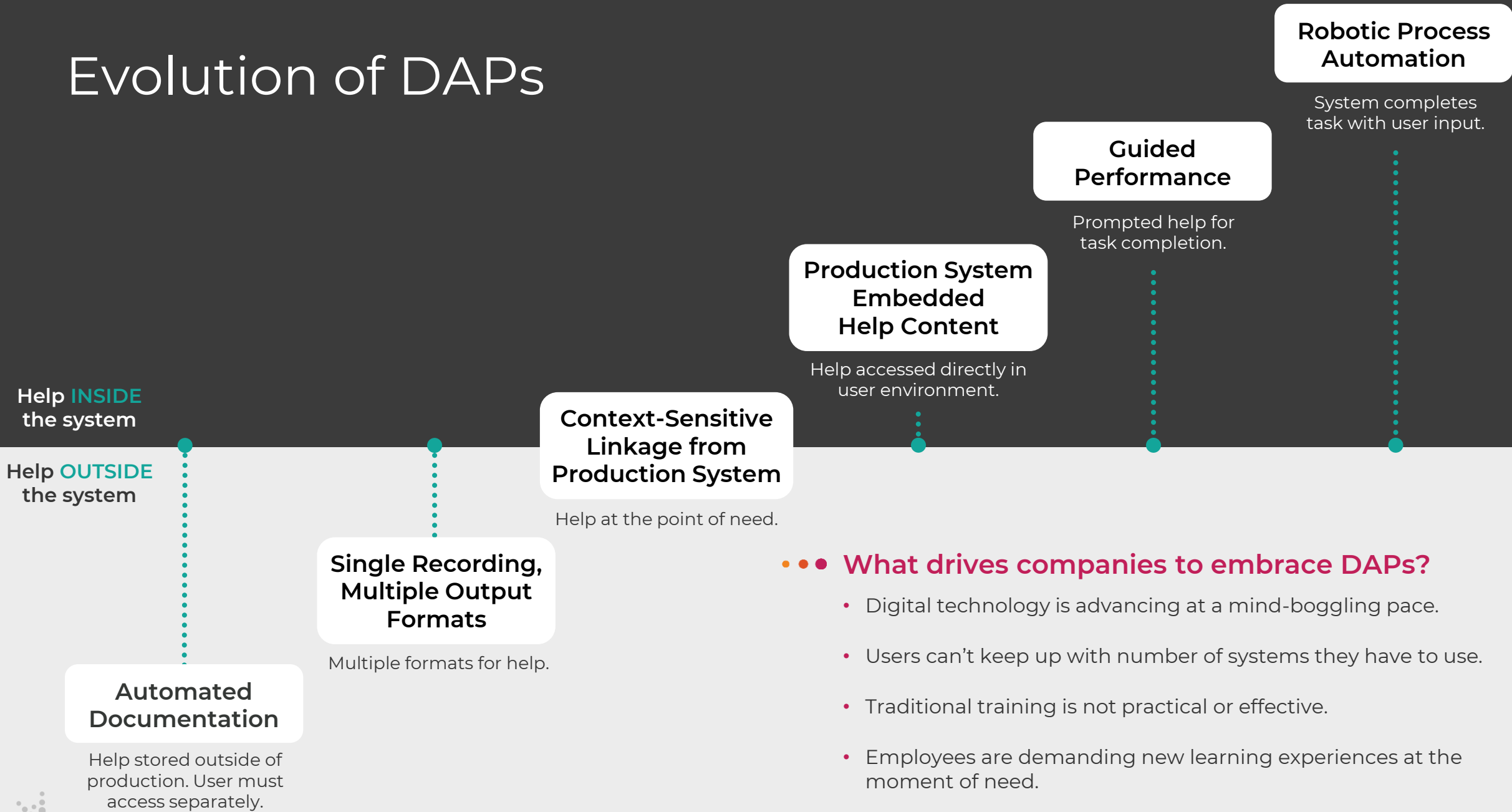Highlight new features or changes to improve awareness and usage.

Data-Driven Adoption
Understand your users' behavior to continuously optimize experience and improve adoption.

Workflow Learning:
Enable real-time learning in the flow of work.

Evolution of DAPs

Robotic Process Automation

System completes task with user input.

Guided Performance

Prompted help for task completion.

Production System Embedded Help Content

Help accessed directly in user environment.

Help INSIDE the system

Help OUTSIDE the system

Context-Sensitive Linkage from Production System

Help at the point of need.

Single Recording, Multiple Output Formats

Multiple formats for help.

Automated Documentation

Help stored outside of production. User must access separately.

● ● ● **What drives companies to embrace DAPs?**

- Digital technology is advancing at a mind-boggling pace.

- Users can't keep up with number of systems they have to use.

- Traditional training is not practical or effective.

- Employees are demanding new learning experiences at the moment of need.

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DAP for Large Enterprises

Enterprises are spending big on software applications

$900 billion

Estimated worldwide spend on software in 2023

—Gartner

300+

Cloud applications used by an enterprise on average

—SaaS Trends 2022

10

Applications used per day on average by an employee

—Asana

Expectations vs. Reality

Lack of technology adoption is the biggest barrier that derails enterprises from achieving their digital transformation goals.
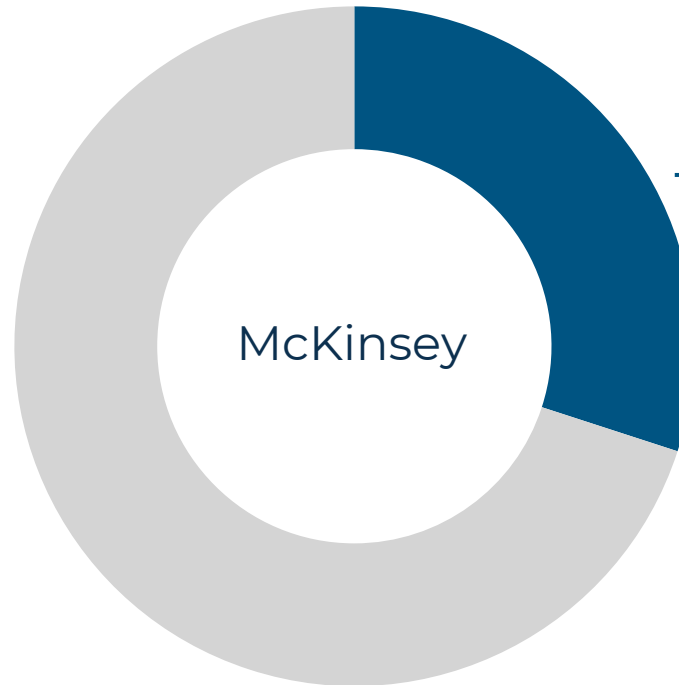
Tech overload

Resistance to change

Skill gap

McKinsey

<30%

Large enterprises consider their digital transformation project to be successful.

Reimagining DAP: data driven DAP

Adoption everywhere: contextual help in moment of need.

Analytics: Measure application adoption to identify adoption gaps and friction points.

Onboarding and training: Make users self sufficient.

Identify specific users based on their behavior.

Works seamlessly across all apps.

Ease of authoring: Create DAP content without technical expertise.

Smart Context

Product Analytics

In-app Guidance

Guidance Analytics

3. Engage

1. Analyze

Automation

Feedback

2. Create

Smart Detect

CLM

Auto Testing

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Identify enterprise wide applications

1.
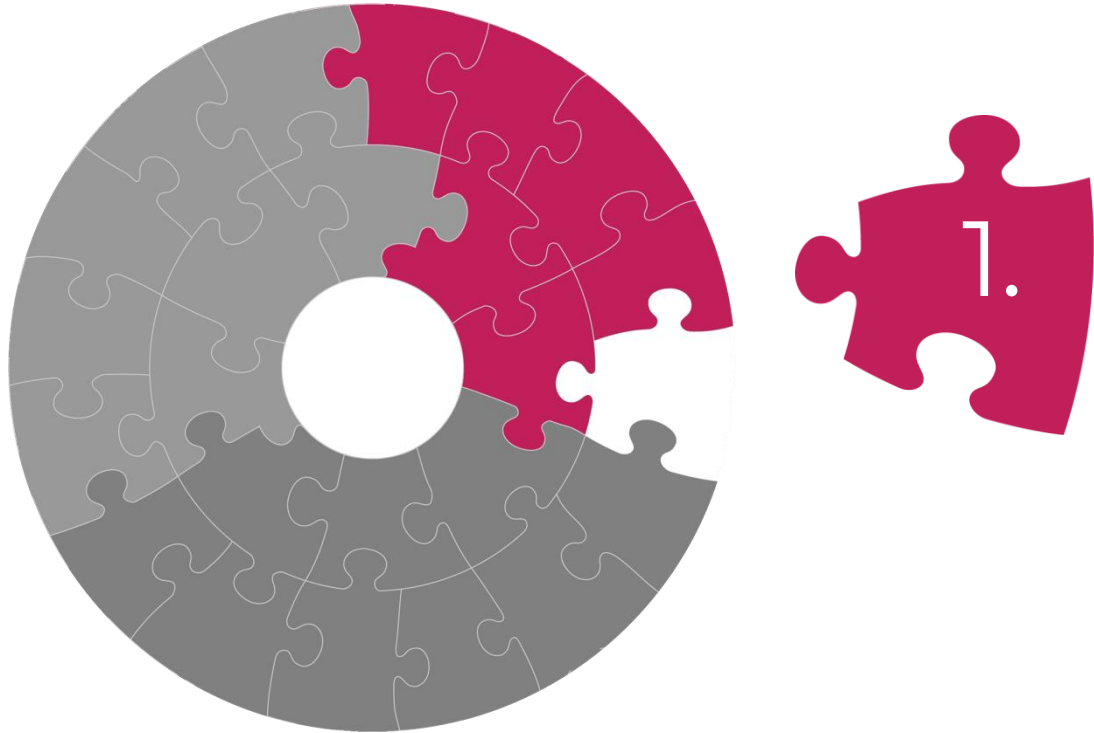
How easy is it for your employees to navigate through the various systems and processes within your organization and find help at the point that they need it?

How many applications (business applications and learning applications) do you have within the organization?

93% of employees say they couldn't do their job without the help of at least **three software applications** every day.

50% of employees say they couldn't do their job without the help of at least **six software applications** every day.

Identify the user journey through these applications

2.

Leveraging a DAP will help identify where your employees are experiencing difficulties, and within which application. This can support the organization to simplify processes and monitor individual adoption levels to examine application ROI.
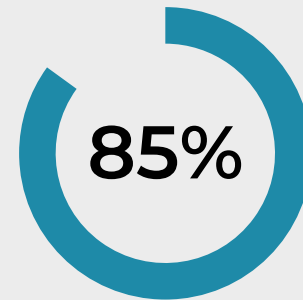
85% of software users have daily tasks and workflows that bridge **multiple software applications.**

Monitor the adoption of multiple applications

3. Learning teams and IT functions are inundated with reports and analytics from multiple applications. Enable considerable time-saving by viewing and monitoring important application metrics in a single view.
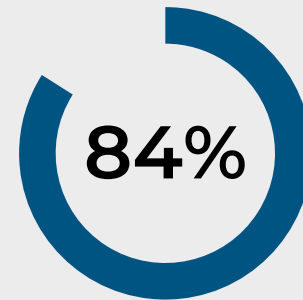
84% of employees say there are core features and processes in the software they use every day that they don't now how to use.

Designing DAP Centers of Excellence for Large Enterprises

Greisy Flores

Director of Value Realization and COE Program

Bio

- Sr. Product Manager of Digital Adoption

- 27 years at Nestlé

- 4 years in Tech L&T (2013-2016)

- 6 years in DA space (2017-2022)

- Established the Nestlé Digital Adoption Center

"My personal goal is to help those who have assumed the role of digital adoption champions.
To shift the conversation away from making people tech savvy to making tech people savvy.
And to measure value through the eyes of the user."

What is a digital adoption center of excellence?

A **dedicated team** working as a centralized hub of expertise focused on **maximizing the value and effectiveness** of the Digital Adoption Program.

Primary goal is to drive the **successful adoption and utilization** of the digital adoption platform across the organization.

Serves as a **strategic advisor and enabler**, providing guidance, and support on digital adoption.

How does a DAP COE work?

Stakeholders					
IT Product Managers	Comms & Change Managers	Business Unit Process Owners	People Dev. & L&T Team	DT and Digital Experience Managers	Product Portfolio Managers

| COE Strategist		**COE Manager** (DAP strategy & DAP evangelist)		Internal
Solutions Engineer		**Technical Lead** (Security, tech expertise, onboarding, enablement)		Internal
COE Program Mgr.		**Business Analyst** (Analytics, business cases, value modeling)		Internal
Project Manager		**Project Manager** (Manage DAP project book of work)		Internal/Partners
DA Assistants		**Content Developers** (Build DAP solutions)		Internal/Partners

Focus of DAP COE? User experience.

Target State
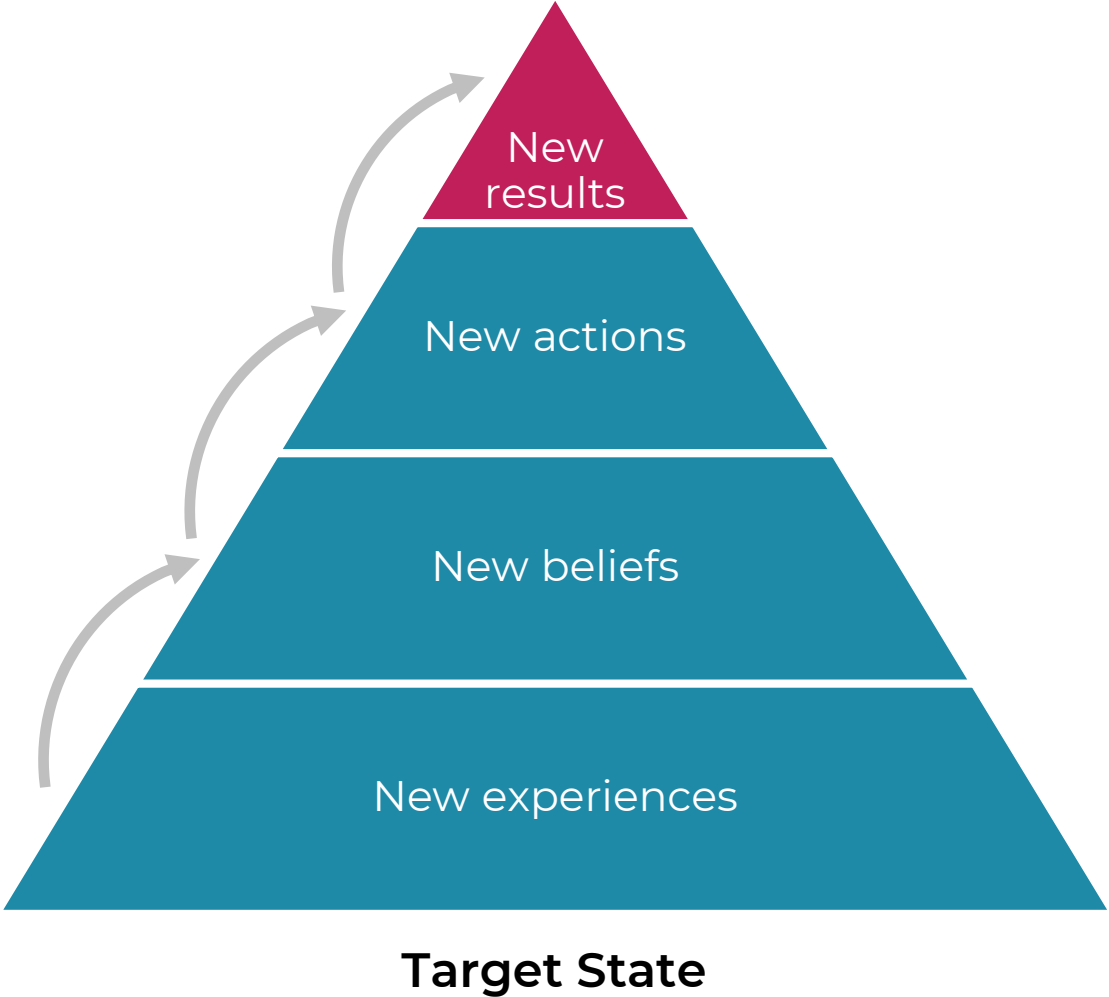
DAP COEs drive userization

Userization goes beyond traditional customization and aims to provide a highly personalized and adaptive user experience.

It does not alter customization and it is easier and more cost effective than personalization.
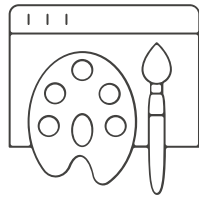
Customization
adapts the technology to specific needs of an organization without fundamentally altering its core functionalities.

Userization
refers to the process of designing digital solutions to meet the specific needs and preferences of individual users.

Personalization
goes deeper into tailoring technology by creating highly customized experiences based on specific user characteristics, behaviors, and preferences.

Benefits of the DAP COE?

Delivering value at scale by improving user experiences with technology.

The DAP COE serves as a strategic enabler, driving the adoption of Whatfix to enhance business performance, achieve organizational goals, and ensure a measurable return on investment.

Whatfix Value Management Process
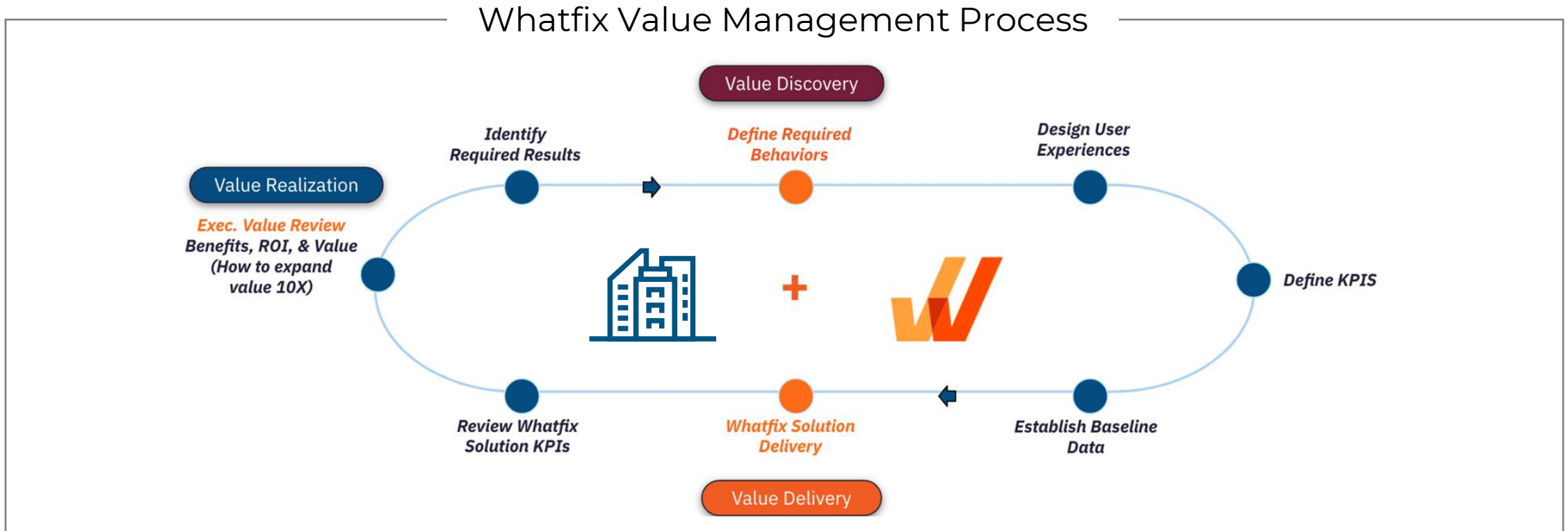
Implementation approach: business objective

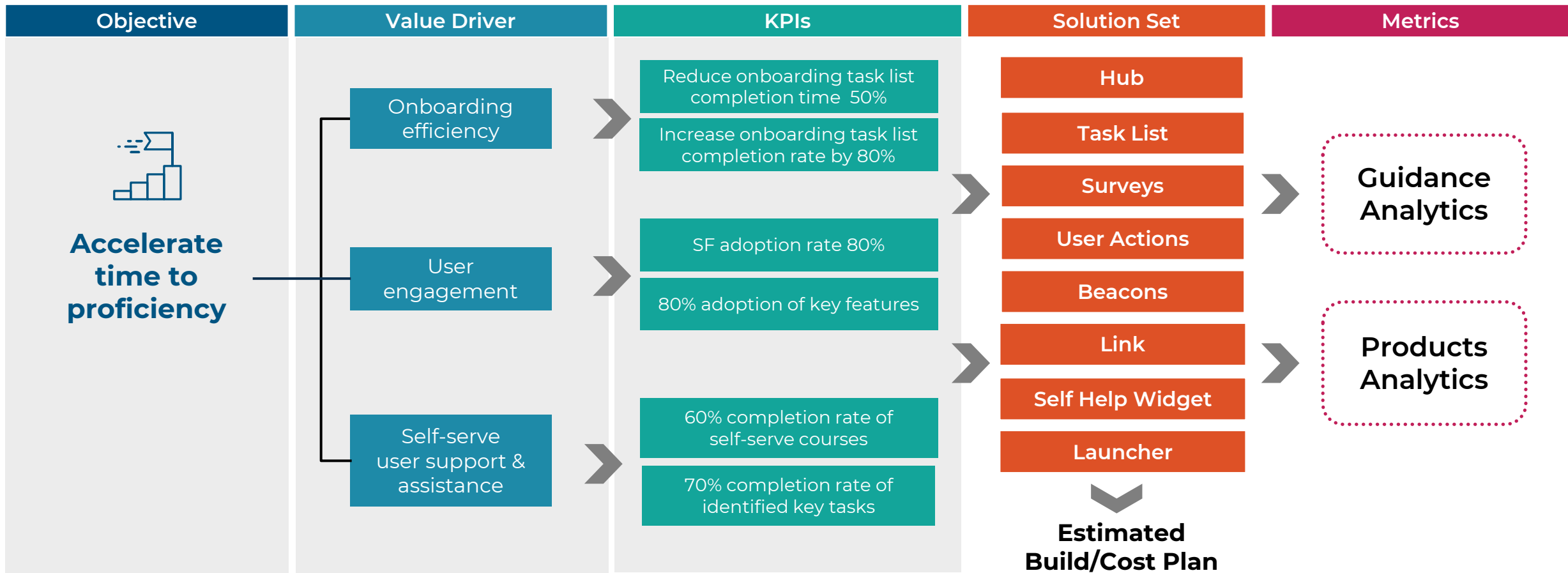Define clear objectives to ensure that content creation aligns with strategic goals, resonates with the target audience, and maximizes value.

Objective	Value Driver	KPIs	Solution Set	Metrics
Accelerate time to proficiency	Onboarding efficiency	Reduce onboarding task list completion time 50% Increase onboarding task list completion rate by 80%	Hub Task List Surveys User Actions	**Guidance Analytics**
	User engagement	SF adoption rate 80% 80% adoption of key features	Beacons Link Self Help Widget	**Products Analytics**
	Self-serve user support & assistance	60% completion rate of self-serve courses 70% completion rate of identified key tasks	Launcher	

Estimated Build/Cost Plan

COE supports application owners

Inform	Improve	Sustain
User Centricity	**Improve Processes**	**Manage & Maintain**

User behavior:
Understand user experience in your application, where they struggle, what they use.

End user feedback:
Gather end user feedback to improve processes.

Measuring adoption:
Use product analytics to track adoption and usage.

- Analyze friction points leading to low user adoption.
- Track performance metrics, and identify areas for improvement.

Onboarding and training:
Speed up the onboarding by providing in-app guidance and training.

Increase compliance to standard:
Increase user adoption and engagement by providing personalized and context-sensitive support that addresses individual user needs and preferences.

- Design fit-for-purpose solutions based on insights.
- Optimize workflows, simplify UX, and increase user engagement.

Reinforce digital behaviors:
Targeted notifications and in-app guidance.

Offer on-going performance support:
Realtime feedback, suggestions, and recommendations to help users complete tasks more efficiently.

Measure progress and success:
Metrics on user behavior and adoption.

- Reduce support effort.
- Reinforce change management objectives.
- Improve continuously.

COE supports IT

Analytics

Insights on UX

Provide insights and analytics:
User behavior and adoption data allows organizations to identify areas of technical debt and prioritize efforts to address them.

Productivity metrics:
Task completion rates, time to complete a task, quality of work, utilization rate.

- Increase visibility of UX.
- Eliminate digital friction.
- Reduce technical debt.

Adoption

Managing Change

Enhancing user productivity:
Improve user productivity by helping them complete tasks more efficiently and accurately, reducing the likelihood of errors.

Accelerate the pace of digital transformation initiatives:
Ensure that end users are effectively utilizing digital tools.

- Automate processes.
- Direct communication with in-app notifications.
- Increase user satisfaction.

User Exp

Standardization

Promoting consistent workflows:
Consistent workflows across users, teams, and departments can reduce the complexity of software usage.

Personalized and context-sensitive training and support.

- Provide on-demand guidance and support within the software itself.

COE supports end users

Learn	Efficient	24/7 Support
Better User Experience	**Simplify Digital Processes**	**Real Time Feedback & Support**
"Provides an engaging and interactive learning experience."	"Helps me complete tasks more efficiently and accurately."	"Provides immediate feedback and suggestions."
"Makes it easy to learn how to use new software or tools."	"Saves me time by providing in-app guidance and support."	"Helps me avoid errors and mistakes."
"Personalized and context-sensitive training and support."	"Reduces the need to switch between different tools or applications."	"Assists me with problem-solving in real time."
"Makes learning new software or tools less intimidating."	"Provides step-by-step guidance that is easy to follow."	"Gives me the confidence to use new software or tools."

Learn
- Reduce training time effort with in-app guidance and tips.
- Reduce onboarding.

Efficient
- Automate processes and remove empty clicks.
- Provide just-in-time notifications and eliminate emails.

24/7 Support
- Self-service, 24/7.
- Learn at your own pace.
- Just in time, just enough, just for me.

Total value proposition
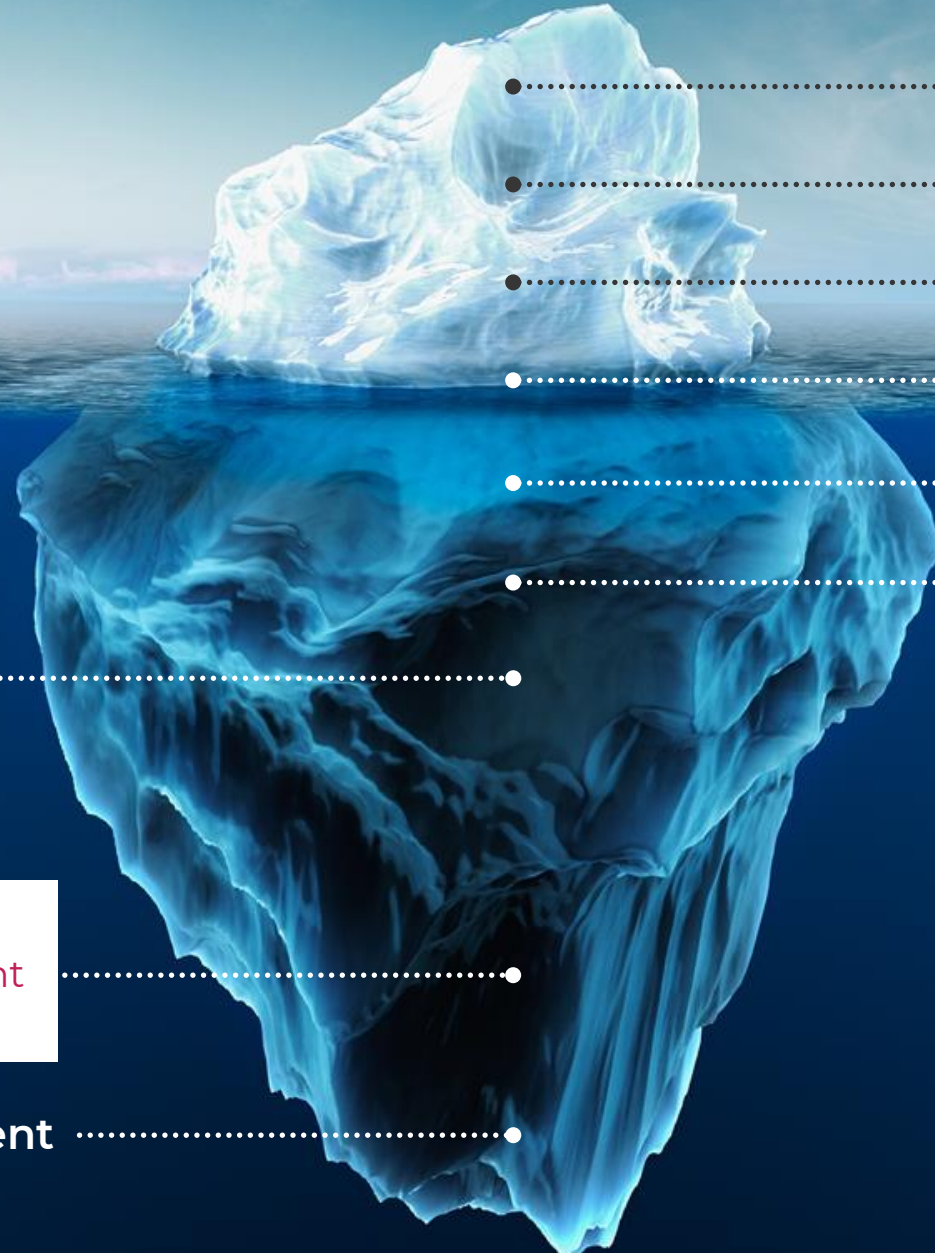
- End User Functionality
- Analytics and Reporting
- Deployment Options
- Integrations
- Product Maintenance
- Security and Compliance

Customer Success Services
- Implementation
- Product training
- Content creation

Value Realization Services
- Customer value management
- Consulting and COE support

DAP Community Management

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Customer
Success Story

Global Information Services Company Drives Salesforce Adoption Across its Global Employee-Base with Whatfix

> **With a heavily customised Salesforce instance and multicultural processes to cater for, the flexibility of Whatfix empowers us to get the right training to the right people, at the right time!**
>
> Senior Specialist, Global CRM Training

? Challenges

- Highly customized Salesforce with a complex process

- Poor adoption and user feedback

- Extensive content creation efforts in launching Salesforce to new Business Units

- Ineffective training and delay in time-to-productivity

Actions

- Intelligent segmentation and automatic element detection

- Interactive on-screen guidance

- Multi-formats to reduce video creation efforts

- Dynamic reinforcement training across geographies and divisions

Application

Salesforce Classic, Salesforce Lightning

Featured Solution

Whatfix powered on-screen guidance technology

Region

UK

Industry

Information Services

Results

50%

reduction in training time

60%

reduction in content creation time

20%

increase in data quality

72%

increase in productivity in the first year of Digital Adoption

About Whatfix

600+ Customers
100+ of Fortune 1000

Clients in **30+ Countries;
6 Offices** (US, UK, Germany,
ANZ, India)

CSAT ~99%
Customer-Driven innovation

Winners with our Customers
(Gold Award for Customer
Service and Experience)

11 Technology Patents Filed
Product focus & expertise

**Strong Partnerships with Global
partners**

"Our vision is to empower companies to maximize business outcomes by eliminating technology complexities for their users"

Contextual | Interactive | Real-time Guidance

Contact us

Nakita Pattni

GP Strategies

npattni@gpstrategies.com

Paul Toffis

Whatfix

paul.toffis@whatfix.com

Greisy Flores

Whatfix

greisy.flores@whatfix.com

Part of Learning Technologies Group plc