

**Deloitte.**

FEBRUARY 2021

# WalkMe + Salesforce



A DIGITAL ADOPTION  
PLATFORM STUDY on WALKME  
& SALESFORCE



# What is the intent of this document

A short overview on what this document does and why it is useful

A digital adoption platform (DAP) is software that works cohesively with a host application in order to help increase in-app user adoption. It may use step-by-step guides, videos, self-help menus, and more to navigate the user through the application

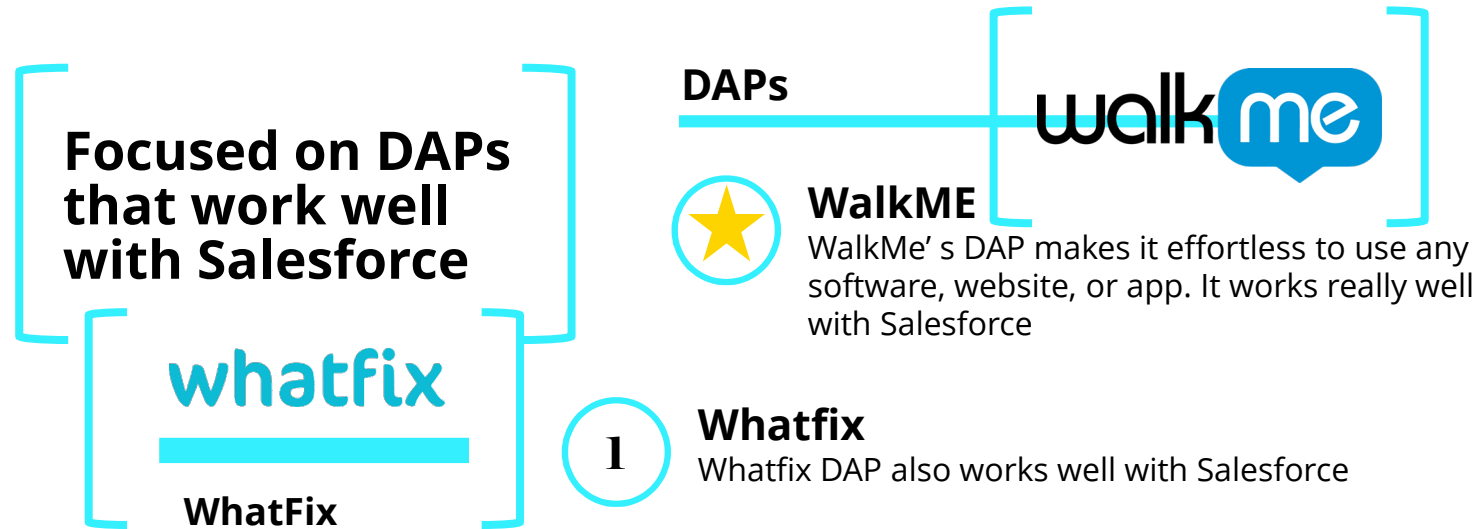
“This document is a guide to be used *to help Deloitte practitioners and Clients understand* the need of DAP tools like WalkMe to highlight the benefits and limitations of this tool”



+ This document has been written based on long term project knowledge gathered through firsthand project experiences and other reference docs provided by different DAP tools.

# The Digital Adoption Platform (DAP) landscape

Understanding what DAPs are out there and what they have on offer today



## Why do companies need DAPs?



### Ineffective Onboarding and Poor Training

Good onboarding is a key for success for any organization, poor onboarding could cost up to 213% of the employee's salary.



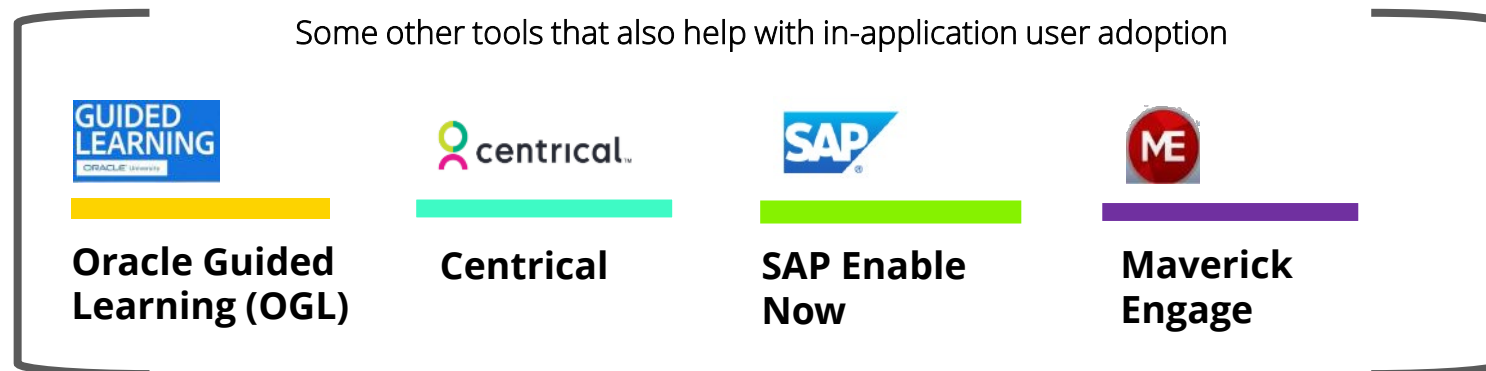
### Lack of Support

71% of companies lose their business because of poor customer support.



### Resistance to Change

Employees are generally resistant to change, and this is the biggest barrier in Digital Adoption. Change is common for any business. Companies migrate from their old system to the new system to catch up with current trends and meet the expected demands. *If they do not change just because they are not comfortable, the reliance on old technology will become a significant disadvantage for the organization.*



# Overview

## WALKME

WalkMe is a Digital Adoption Platform used to create in-application experiences to train and onboard users, by methods including but not limited to step-by-step guidance for processes, notifications for announcements, and tooltips for field-level information. It integrates with and supports web, mobile, and desktop cloud applications.

- Works with all cloud applications
- Enables contextual guidance for user experience
- Doesn't require coding capability, only foundational understanding of HTML
- Provides insights and analytics into user engagement and user journey analysis
- Allows options for in-application communication and step-by-step guidance
- Allows access to documents, videos, images, and external links
- Supports role-based content segmentation
- Supports multi-language implementation

## WHATFIX

WhatFix is a Digital Adoption Platform used to provide on-the-job learning to users. This tool works like a "mini LMS" within the application hosting contextual step-by-step guides, tooltips, onboarding tasks, resources etc. WhatFix supports web applications and has started development for desktop and mobile applications.

- Enables contextual guidance for user experience
- Easy to use – does not require coding capability
- Supports analytics on user engagement
- Allows access to documents, videos, images, and external links
- Ability to integrate with large number of enterprise technologies, including analytics tools, chatbots, knowledge bases, LMS, surveys

## CENTRICAL

Central is a holistic engagement platform that drives employee performance using gamification, personalized microlearning & goals and data-driven feedback.

- Advanced gamification
- Personalized microlearning
- Automated, data-driven feedback
- Real-time performance management
- Partnerships with Salesforce, Oracle and SAP

# Overview (Cont'd)

## SAP ENABLE NOW

SAP Enable Now is an authoring tool for creating courseware, recording, editing, and distributing step-by-step transaction simulations, and managing end to end content development projects.

- In-app learning tutorials
- Template-based content creation
- Integrated performance support
- Different outputs (documentation, simulations, demos, etc.) from a single recording
- Multi-modality for content reuse
- Automatic localization

## OGL

OGL is an embedded learning solution that delivers in-application guidance and learning content to help understand business processes, recognize and follow changes to those processes, review policy guidelines, and accurately complete transactions in compliance with business requirements.



- Enables just-in-time, context-sensitive learning that's personalized for the user
- Incorporates user-specific customization as blended learning
- Enables rapid learning across a distributed workforce and gets automatic updates with new releases
- Doesn't require coding capability, only foundational understanding of HTML
- Supports various processes such as Accounts Payable, Invoice Management, Creating Reports, Manage Approvals, Supplier Management, etc.

## MAVERICK ENGAGE


Maverick Engage offers a complete solution for the entire enterprise, featuring a full suite of training content for Oracle's Cloud solutions, including HCM & Taleo, Financials, Project Portfolio Management, and Supply Chain Management.

- Integrated training package for Cloud Project Team and Functional End Users
- Content upgrades at no extra cost
- Interactive on-demand activities
- Real time community and expert support
- Automated monthly reporting enabling measurement of team acceptance and user adoption
- Maximizes Adult Learning through the "Tell Me, Show Me, Let Me" feature

# Feature Pros v/s Cons

	W A L K M E	W H A T F I X	C E N T R I C A L	S A P E N A B L E N O W	O G L	M A V E R I C K E N G A G E
 <b>P R O S</b>	<ul style="list-style-type: none"> <li>• Ease of development – no coding experience required</li> <li>• Supports all cloud applications</li> <li>• Offers in-depth insights on usage and user journeys</li> <li>• Guides users through key business processes reducing support tickets</li> </ul>	<ul style="list-style-type: none"> <li>• Ease of development – no coding experience required</li> <li>• Integrates with multiple enterprise applications</li> <li>• One application for most of the enterprise training material</li> </ul>	<ul style="list-style-type: none"> <li>• Noted for designing highly customized programs to sustain engagement and personalized, bite-sized learning content for employees</li> </ul>	<ul style="list-style-type: none"> <li>• Integrated performance support</li> <li>• Multiple outputs (documentation, simulations, demos, etc.) from a single recording</li> <li>• Multi-modality for content reuse</li> <li>• Automatic localization</li> </ul>	<ul style="list-style-type: none"> <li>• Enables workforce to be productive on the cloud from day one</li> <li>• Guides are updated with each software release</li> <li>• Takes feedback from the end user for every guide</li> </ul>	<ul style="list-style-type: none"> <li>• This tool provides a full suite of training content for Oracle's Cloud solutions</li> </ul>
 <b>C O N S</b>	<ul style="list-style-type: none"> <li>• Repeated content maintenance effort for dynamic applications</li> <li>• High dependency on WalkMe Support and R&amp;D teams for settings and extension configurations</li> </ul>	<ul style="list-style-type: none"> <li>• Does not support mobile and desktop applications</li> <li>• High dependency on product team for extension configuration</li> <li>• Limited design and styling options</li> </ul>	<ul style="list-style-type: none"> <li>• Advanced gamification</li> <li>• Personalized microlearning</li> <li>• Automated, data-driven feedback</li> <li>• Real-time performance management .</li> <li>• Integration with legacy LMS software</li> </ul>	<ul style="list-style-type: none"> <li>• Tool set up post installation is time consuming</li> <li>• Template setup for BPP documentation is complex and fragmented</li> <li>• Each slide in simulations and courseware to be updated manually</li> </ul>	<ul style="list-style-type: none"> <li>• Unavailability of QRGs, Job Aids, Simulations</li> <li>• Does not offer SSO</li> <li>• Is compatible only with Oracle Cloud</li> <li>• In case of process break, the flow needs to be restarted</li> </ul>	<ul style="list-style-type: none"> <li>• Integrated training package</li> <li>• On-demand QRGs, Job Aids</li> <li>• Hands-On Simulations</li> <li>• Integrates with LMS via SSO</li> <li>• Does not support in-application guidance</li> <li>• Only for Oracle Cloud</li> </ul>

# Feature USP and License Cost

	W A L K M E	W H A T F I X	C E N T R I C A L	S A P E N A B L E N O W	O G L	M A V E R I C K E N G A G E
 U S P	<ul style="list-style-type: none"> <li>This tool is intuitive and integrates with web, desktop, and mobile applications. It offers on-demand contextual guidance, which supplements other trainings to improve user adoption</li> </ul>	<ul style="list-style-type: none"> <li>This tool is like a mini-LMS which integrates with the web application and provides contextual step guides, learning resources, within the application</li> </ul>	<ul style="list-style-type: none"> <li>Holistic employee engagement platform that uses gamification and microlearning to boost performance</li> </ul>	<ul style="list-style-type: none"> <li>Preferred by clients for its rapid authoring capabilities, easy maintenance and delivery of performance support, learning material and documentation</li> </ul>	<ul style="list-style-type: none"> <li>OGL is the only learning tool for Oracle Cloud to offer guides based on roles and positions. Oracle content experts design and create the guides for end users working on Oracle Cloud applications</li> </ul>	<ul style="list-style-type: none"> <li>Complete solution for the entire enterprise, featuring a full suite of training content for Oracle's Cloud solutions</li> </ul>
\$ L I C E N S E  C O S T	<ul style="list-style-type: none"> <li>Information not available, must contact their Sales team for this information</li> </ul>	<ul style="list-style-type: none"> <li>Information not available, must contact their Sales team for this information</li> </ul>	<ul style="list-style-type: none"> <li>Information not available, must contact their Sales team for this information</li> </ul>	<ul style="list-style-type: none"> <li>Information not available, must contact their Sales team for this information</li> </ul>	<ul style="list-style-type: none"> <li>Information not available, must contact their Sales team for this information</li> </ul>	<ul style="list-style-type: none"> <li>Subscription based, must contact their Sales team for this information</li> </ul>



# Feature Comparison of Tools

Dimension	Criteria	SAP	GUIDED LEARNING ORACLE University	ME	walkme	whatfix	central
Ease of Use	Easy for developers to build training content	Very good	Not supported	Information unavailable	Very good	Very good	Very good
Language Support	Offers multi-lingual support	Very good	Very good	Information unavailable	Very good	Very good	Good
Customer Support	Accessibility to vendor support team	Average	Very good	Very good	Very good	Very good	Very good
Training Content Formats	Offers multiple output formats	Very good	Not supported	Very good	Poor	Good	Information unavailable
End-user Metrics	Offers in-depth user adoption metrics	Very good	Very good	Very good	Very good	Very good	Very good
License Cost	Cost of using the tool	Price on Request	Price on Request	Subscripti on based	Price on Request	Price on Request	Price on Request
Multi-developer Access	Offers multiple developers to access the tool at the same time	1 person at a time	Not supported	Information unavailable	Not supported	Information unavailable	Information unavailable
Contextual Guidance	Offers contextual guidance based on users' interaction with the system	Very good	Good	Very good	Very good	Good	Information unavailable

\*Based off an Internal Deloitte Study from 2020



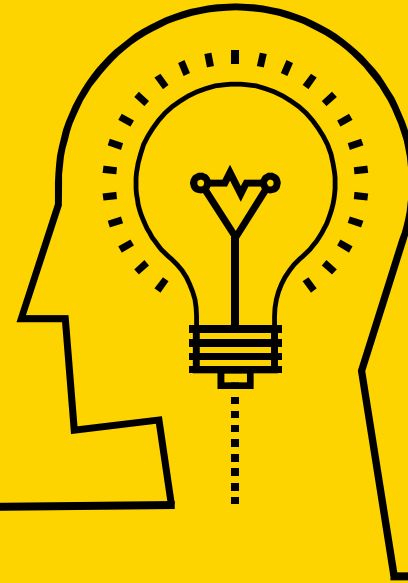
# Feature Comparison of Tools

Dimension	Criteria	SAP	GUIDED LEARNING ORACLE University	ME	walkme	whatfix	central
Compatibility with Browsers	Multi-browser compatibility	Good	Good	Information unavailable	Very good	Good	Information unavailable
Compatibility with applications	Multi web applications compatibility	Very good	Poor	Poor	Very good	Very good	Very good
Ease of Setup	Allows easy setup and configuration with the application	Very good	Not supported	Information unavailable	Very good	Very good	Very good
Level of Customization	Offers customization flexibility	Good	Good	Good	Good	Average	Very good
Maintenance of Application & Content	Ease of maintaining the application and the training content library	Very good	Very good	Very good	Average	Information unavailable	Information unavailable
Ease of Deployment	Enables easy deployment to Sandboxes and Production	Very good	Very good	Very good	Good	Good	Information unavailable
Scalability	Offers global scalability for enterprises	Good	Very good	Very good	Good	Good	Very good
Mobility	Supports mobile platforms alongside web	Very good	Not supported	Information unavailable	Good	Not supported	Very good
Analytics	Offers relevant in-depth and insights into the end user statistics	Very good	Very good	Very good	Very good	Good	Very good
Information Security	Offers data-security safeguards for enterprises	Very good	Very good	Information unavailable	Good	Information unavailable	Information unavailable

\*Based off an Internal Deloitte Study from 2020

# What's on offer OOTB

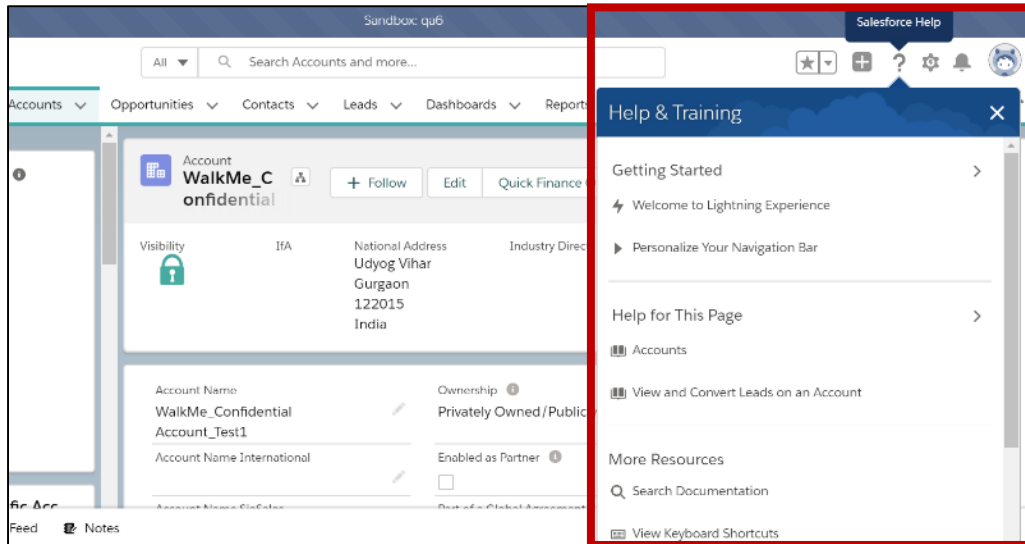
Let's see what Salesforce provides OOTB for DAP and to help increase User Adoption in general



# Salesforce's OOTB User Adoption: Introduction

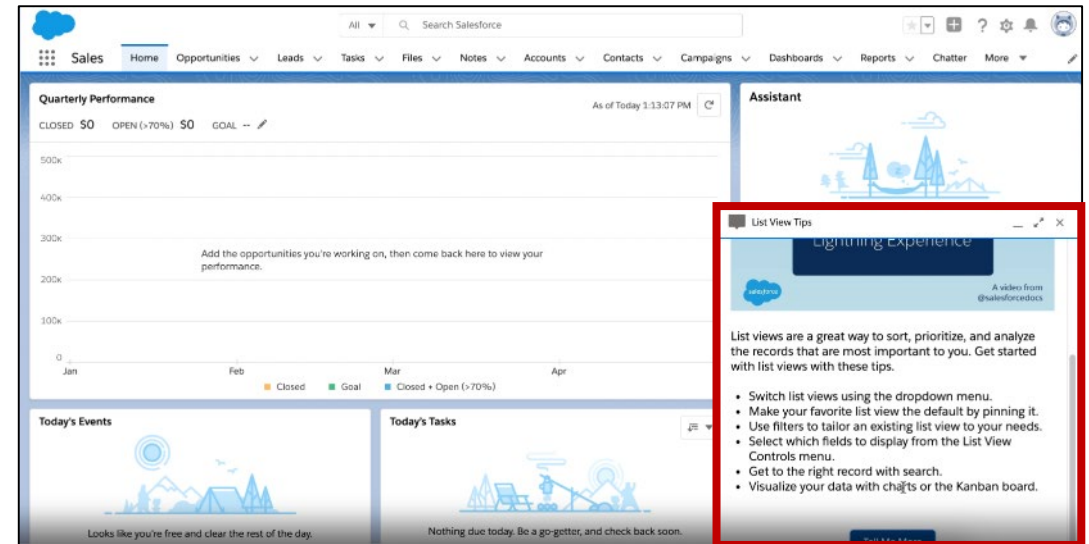
Salesforce has two primary user adoption tools – **Object Level Help** and **In-App Guidance**. Outlined below is an overview of the two.

## Object Level Help



Provides customized help to ensure training resources for the select object are available, and allows for holistic knowledge management

## In-App Guidance



Prompts users about key announcements for information spread, share key resources to provide targeted help to users about common subjects

# Object Level Help: Deep Dive

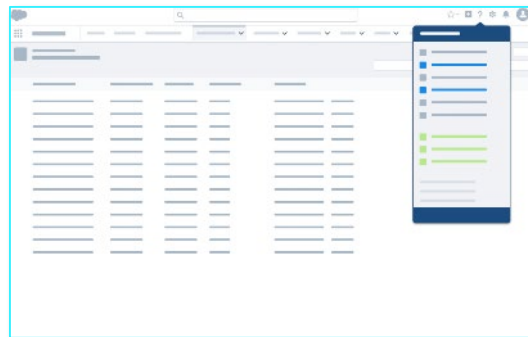
An in-depth look into utilizing customized Object Level Help for improving onboarding of new users to the application

## OVERVIEW

- Allows to create a **repository of training** and onboarding documents for key application functionalities
- Useful in making **on-demand help** available for the business users on critical functionalities within each Salesforce theme
- **Global Help & Resources documents** can also be included in the customized help menu

## REQUISITE CAPABILITY

- Knowledge Management
- Content Development



## BUSINESS USE

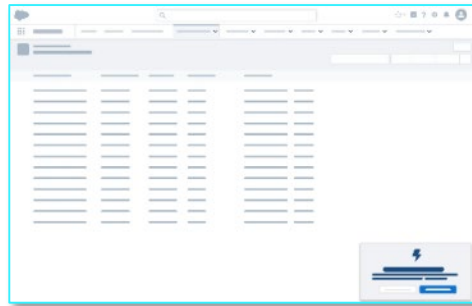
- Incident guidance: Targeted prompts on specific Salesforce workflows causing Incidents can be created to **reduce possible support tickets**.
- Project Features: Prompts can be creatively utilized to inform user about specific Project features. Example, **employee productivity** and system adoption can be increased by strategic prompts to targeted users on New / Less-utilized features.
- Announcements: Key announcements can be made directly on the Project platform, along with key resources related to the announcement. This **reduces email dependency**.
- Productivity and Interactivity: Use prompts to gamify the Project user experience by scheduling targeted communication campaigns for helping users utilize the complete Project and Lightning functionalities to **work effectively and efficiently**.
- Additional Dimension to Learning: Use prompts to redirect to new micro-learning resources on Project

# In-App Guidance: Deep Dive

An in-depth look into utilizing In-App Guidance for boosting productivity and engagement of business users.

## OVERVIEW

- Salesforce In-App Guidance **Prompts** are on screen pop-overs in a user's workflow
- Useful in prompting the user to **take certain actions**, sharing key announcements and resources
- A prompt can either be **floating** or **docked**, available on specific webpages
- Their visibility can be **customized** by permission sets / roles
- It is a new Salesforce Feature (made available in 2019 Summer Release)



## REQUISITE CAPABILITY

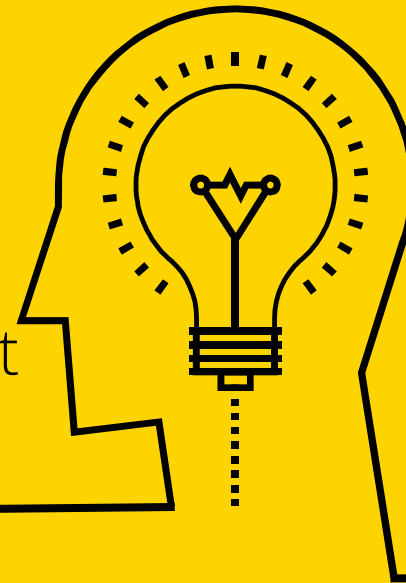
- Creative Content Development (Copywriting)
- Learning Development and Authoring Tools (if e-Learnings are considered)

## BUSINESS USE

- AMC Incident: Targeted prompts on specific Salesforce workflows causing AMC Incidents can be created to **reduce possible AMC tickets**.
- Application Features: Prompts can be creatively utilized to inform user about the features. Example, **employee productivity** and system adoption can be increased by strategic prompts to targeted users on New / Less-utilized features.
- Announcements: Key announcements can be made directly on the platform, along with key resources related to the announcement. This **reduces email dependency**.
- Productivity and Interactivity: Use prompts to gamify the user experience by scheduling targeted communication campaigns (such as Weekly Productivity Boost) for helping users utilize the Salesforce Lightning functionalities to **work effectively and efficiently**.
- Additional Dimension to Learning: Use prompts to redirect to new micro-learning resources

# WalkMe Features

Let's take a deep-dive into the features that make the product and what it did for the Client



# WalkMe: Overview

WalkMe offers the following features, making it a useful training modality for end-user adoption:



Provides in-application **context-sensitive** assistance to users to improve digital adoption



Drives **users to action** through custom workflows, visual cues and strategically placed instructions



Gives step-by-step **interactive guidance** to complete critical and complex business processes

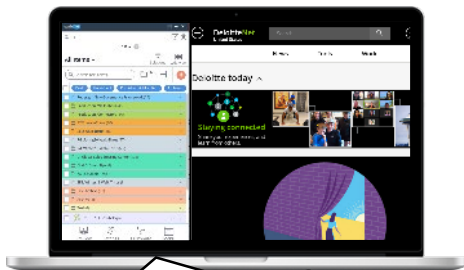


Enables both enterprise-wide and targeted **communication** of key messages & announcements



Creates an **in-app repository** of on-demand learning resources, support pages, and other external links

WalkMe has three major components: **WalkMe Editor**, **WalkMe Player** and **WalkMe Insights**



**WalkMe Editor:** An easy-to-use backend tool for creating, editing, publishing, and managing WalkMe Apps



**WalkMe Player:** The front-end where users access the published WalkMe content



**WalkMe Insights:** The analytics tool to collect data and draw insights on user engagement, adoption, and KPIs



# WalkMe: Global Enterprise Readiness

WalkMe offers enterprise-specific features making it a viable digital adoption platform for global enterprises



**Segmentation** enables the personalization of training content for users with different roles, personas, languages, regions, etc.



WalkMe caters to enterprise **security** needs – it allows flexibility of hosting content and settings files on the client servers.



**WalkMe Mobile** helps in mobile application adoption by allowing instructional designers to build WalkMe content tailored to mobile applications.



**Multi-language support** provides global reach and accessibility of WalkMe content, by using an export / import feature.



**WalkMe Insights** provides real-time statistics on end-user adoption, usage, engagement and preset KPIs on the use of WalkMe.



**User Management** supports team multi-user collaboration for content development and controlling access levels by pre-defining roles.

# WalkMe: Key Applications and Features

WalkMe offers a range of applications to provide the user with a holistic learning and onboarding experience.



## Smart Walk-Thrus

Guides users **step-by-step** through business processes using interactive callouts



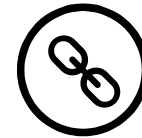
## ShoutOuts

Announces **important messages and updates** on specific webpages and /or overall system



## Onboarding

Takes the users through a **checklist of tasks** to onboard to the new system



## Shuttles

Navigates users to pages that are **several clicks away or difficult to find**



## Resources

Integrates videos and articles directly into the player menu for **on-demand learning**



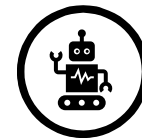
## SmartTips

Displays **tooltips** to guide users to input correct information or select the right option



## Launchers

Reduces chances of errors by providing **contextual guidance** on the right pages

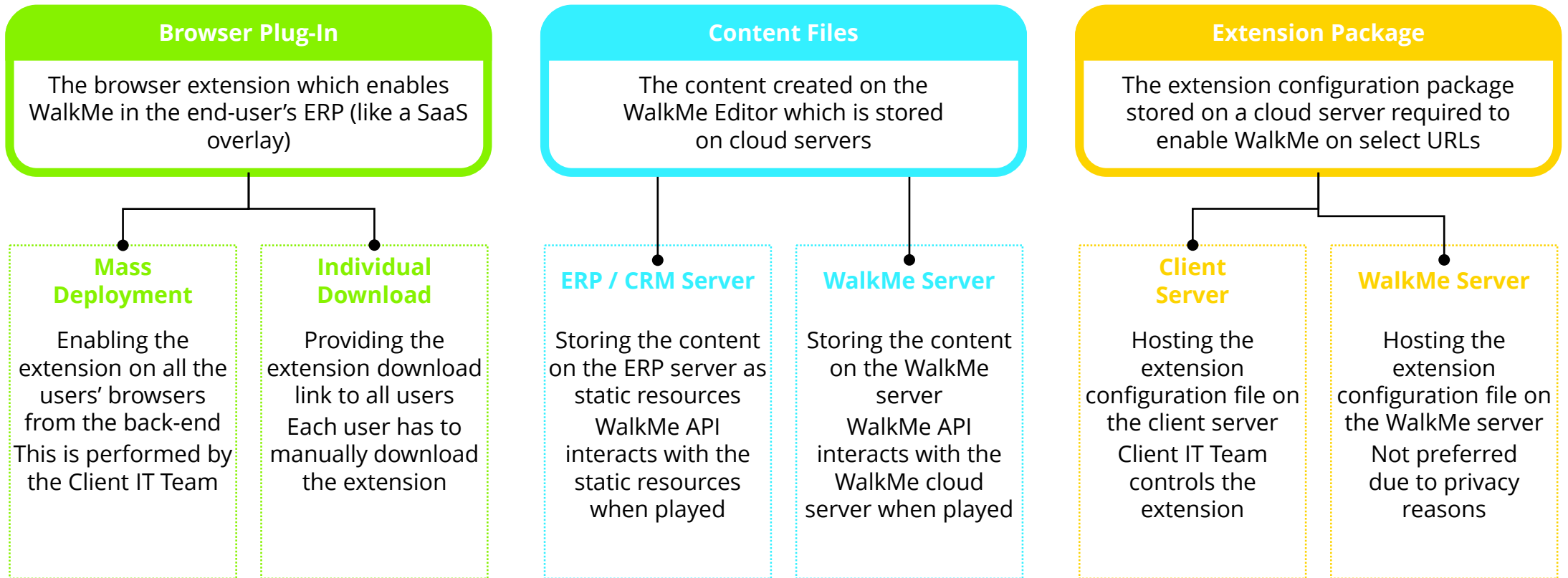


## ActionBots

Automates processes using a **natural chat interface**, to enhance employee experience

# WalkMe Setup

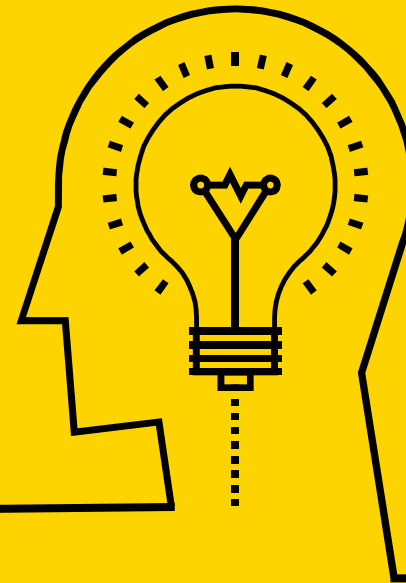
Outlined below are the different options for configuring WalkMe on a client system.



Test and Production URLs are configured on the Extension. For any new URL configurations, contact WalkMe Support

# Demo: WalkMe

Let's see WalkMe in action



# Demo: WalkMe for the Client

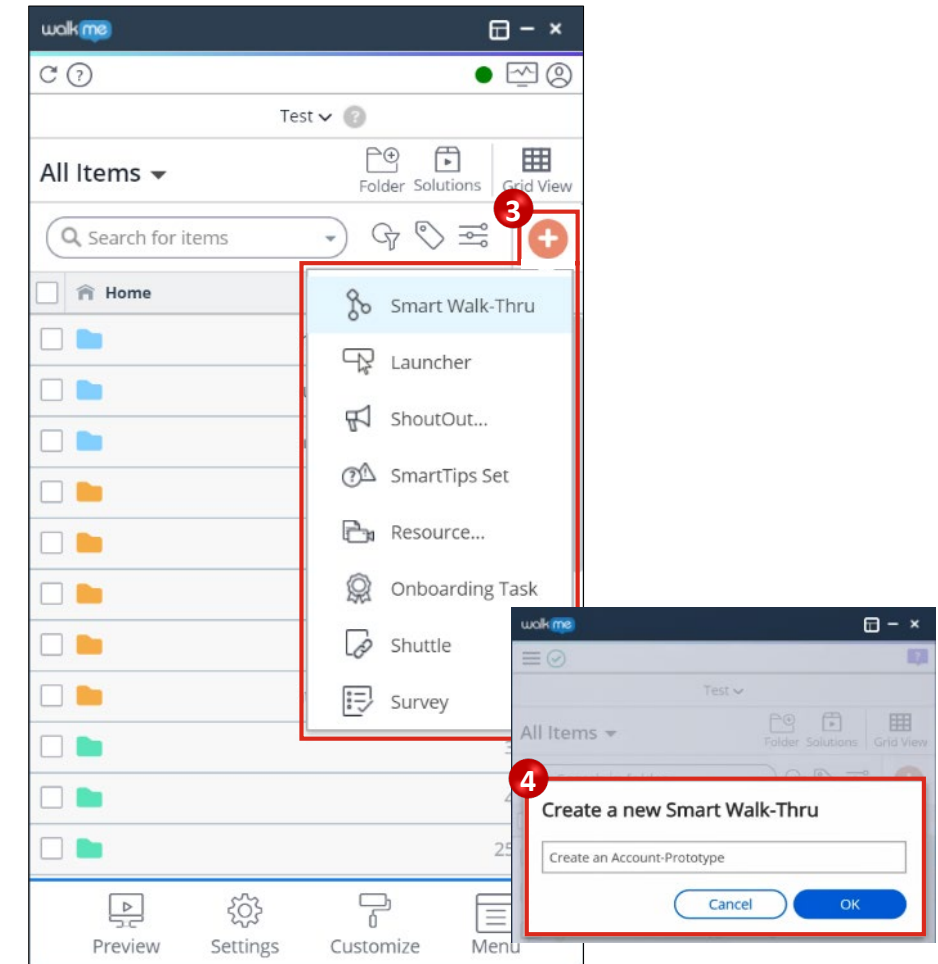
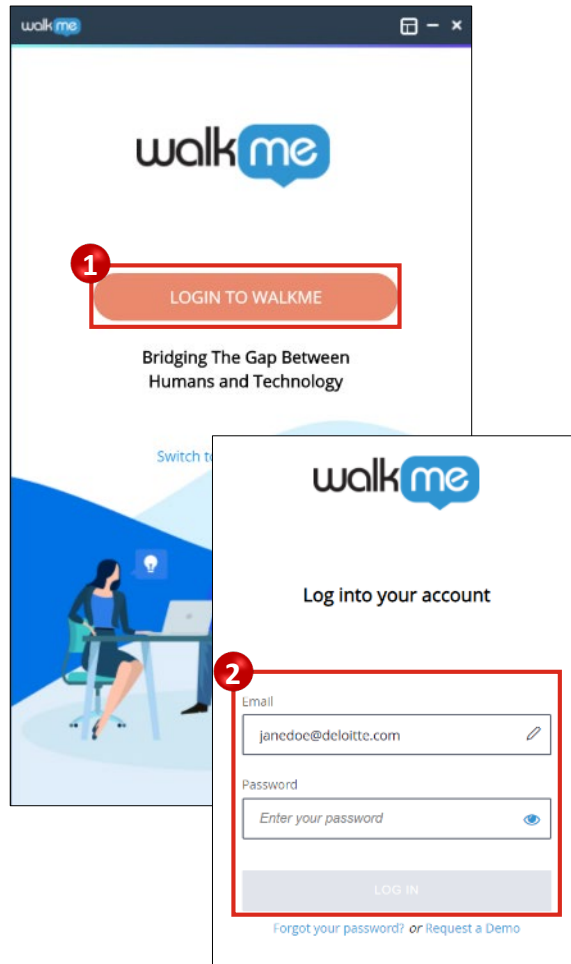
A demonstration of the user experience of using WalkMe's step-by-step contextual guidance in Salesforce for creating an account.

**For Access to the video recording please reach out to Manu Goel <mgoel@deloitte.com>**

# Developing Smart Walk-Thrus

Smart Walk-Thrus provide interactive step-by-step guidance providing the right information at the right stage.

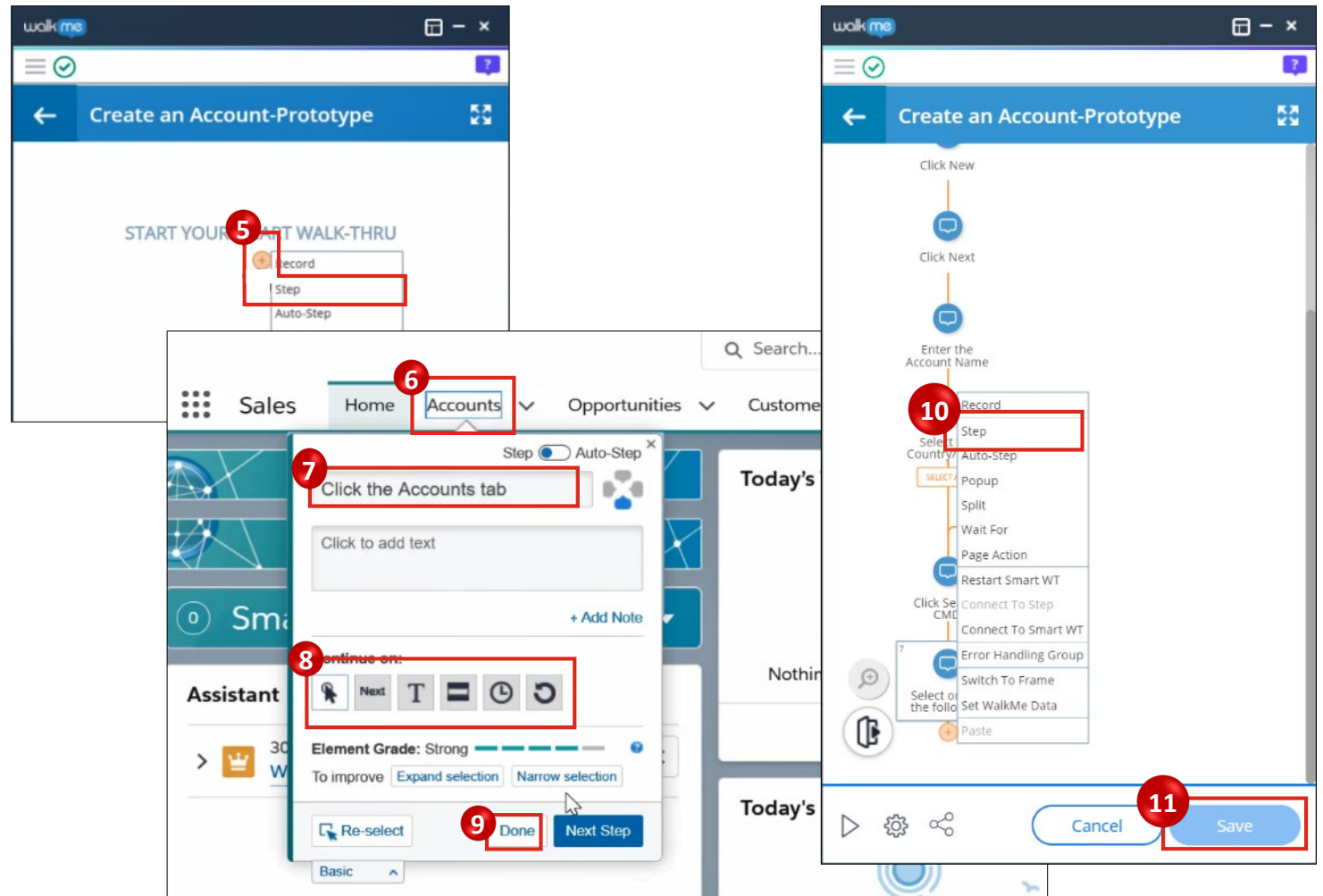
1. Open the WalkMe Editor application and click **Login to WalkMe** to be redirected to the WalkMe account login webpage
2. Enter the login credentials received from the Account Manager and click **Sign In** to login to the WalkMe application
3. Click the **+** icon and select **Smart Walk-Thru** from the dropdown
4. Enter the name of the new Smart Walk-Thru and click **OK** to create and automatically open the Smart Walk-Thru



# Developing Smart Walk-Thrus (Cont'd.)

Smart Walk-Thrus provide interactive step-by-step guidance providing the right information at the right stage.

5. Hover over the + icon and select Step from the dropdown to open the Screen Element Selection feature
6. Select the element on the webpage on which this step is to be anchored
7. Label the step and select the position of the callout
8. Select the **trigger** for the next step
9. Click **Done**
10. Repeat the above process to add the remaining steps in the flow
11. Click **Save** once all the steps have been added to the Walk-Thru





# Developing Smart Walk-Thrus (Cont'd.)

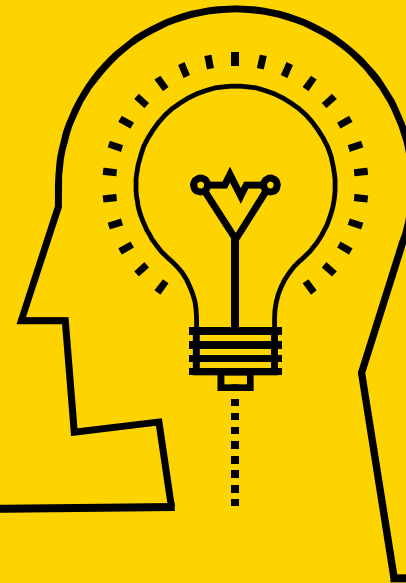
A demonstration of the complete procedure of capturing a functional process using WalkMe.

**For Access to the video recording please reach out to Manu Goel <mgoel@deloitte.com>**

# Effort

# Estimations

Let's see how long it take to create these flows  
for the Client



WHERE DO WE START?

When we estimate for WalkMe, we need to take into consideration the following:

- 1. Individual flow build
- 2. Flow maintenance and upkeep
- 3. Salesforce releases and DOM changes
- 4. Overall Operate Support needed

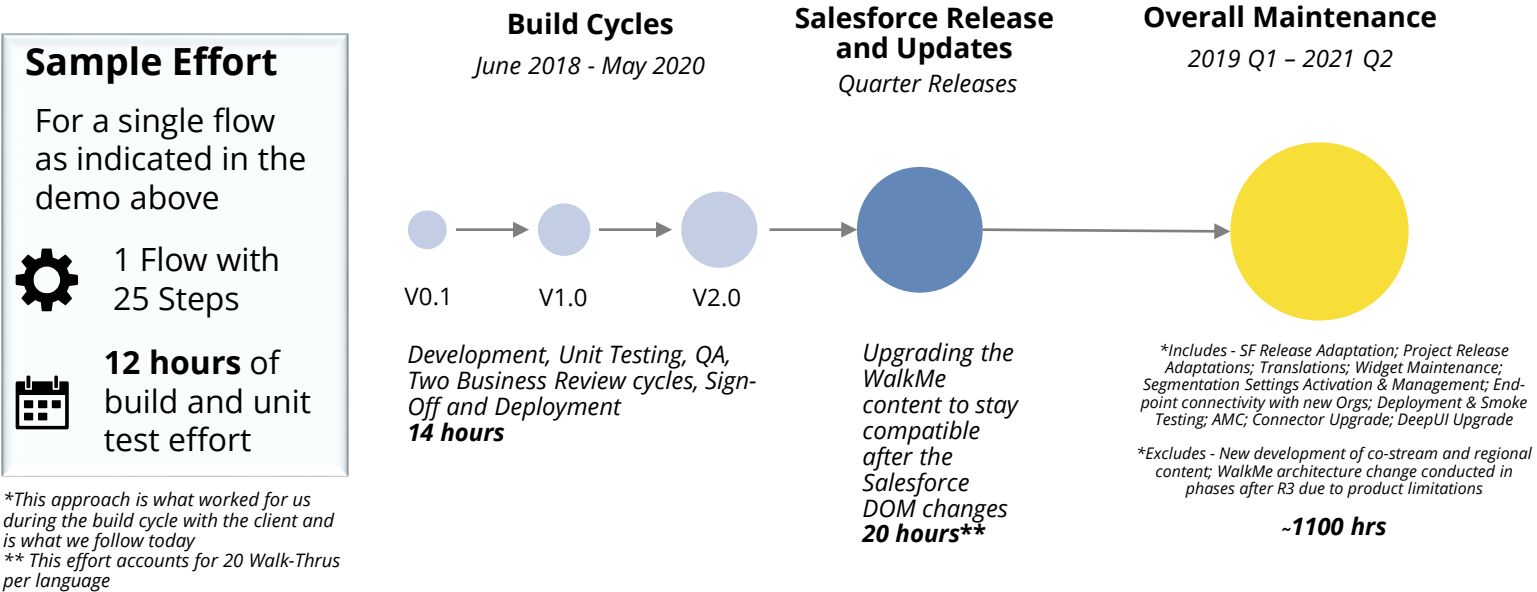
Our approach\*

We built the user adoption content (viz. step-by-step guides, onboarding flows, and field-level help) in a phased approach.

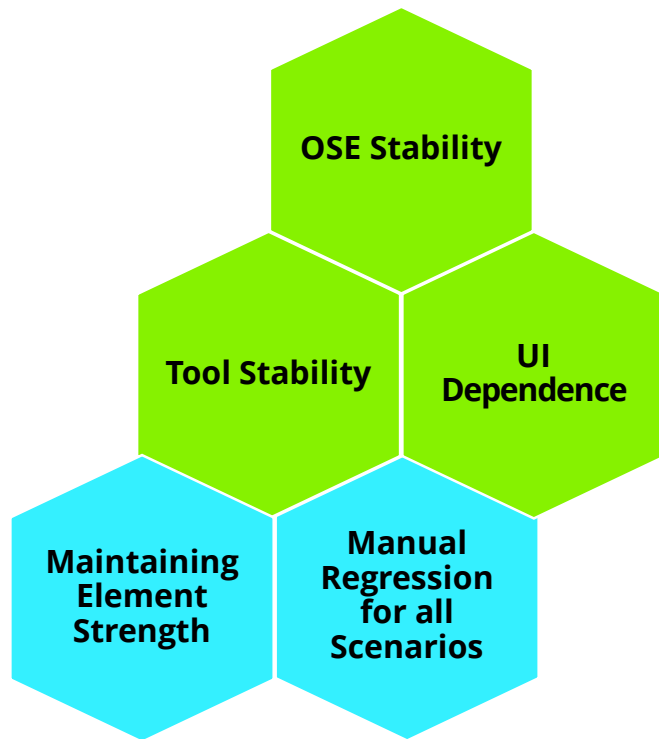
We began by conducting the training needs analysis and identifying the specific process flows (viz. Create an Account, Create an Opportunity, etc.) that users had to be trained on. We then built the training content on the WalkMe tool once the functionality was developed on Salesforce. After the content was reviewed and signed off by the business in QA and UAT, it was deployed to Production during the cutover window with the R1.

The content was scaled up to other regions as 5 language translations were added to 20 Walk-Thrus. New Walk-Thrus, Smart Tips and Shoutouts were also developed as new functionalities (viz. Contract Management, Partner Management, etc.) were added over and above the global blueprint across releases, i.e. R2 - R9.

The existing library of 60+ WalkMe items is now being maintained with every major client and Salesforce release to keep it aligned with the latest codebase, UI and DOM of the application.

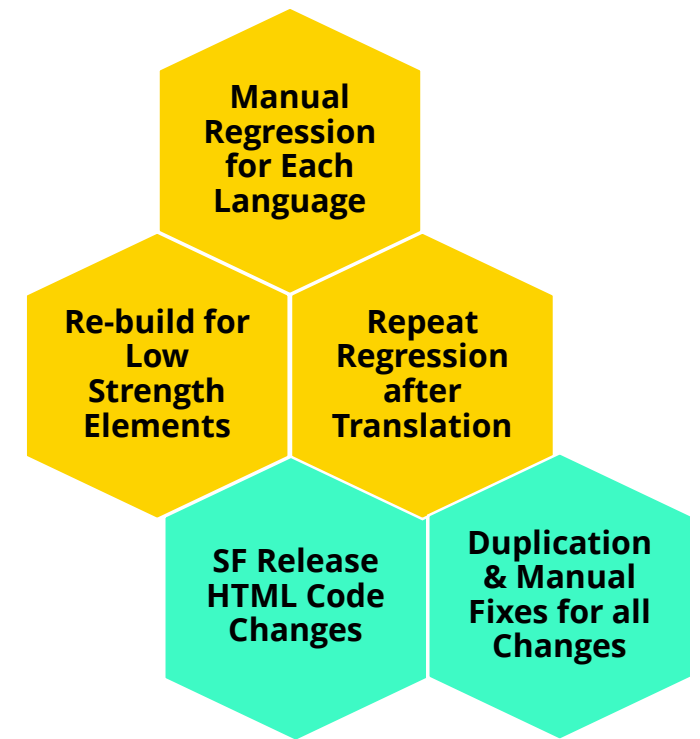


# WalkMe Effort Drivers by Phase



## Underlying Reasons for the Effort Drivers

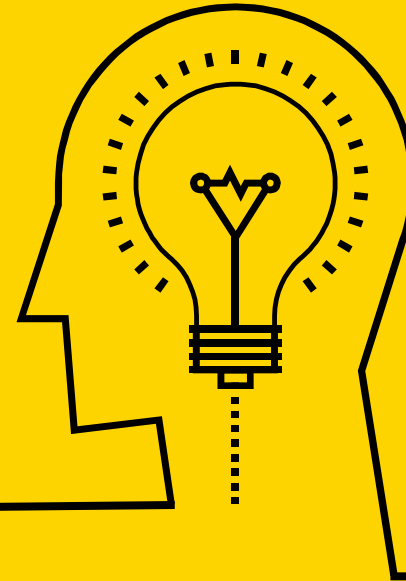
- 1** Manual end-to-end regression checks after any system UI or code change
- 2** Re-selection (rebuild) followed by QA is often the solution for breaking content
- 3** Dependence on the HTML code of Salesforce, which changes every release
- 4** Maintaining user experience while adhering to the governance framework



# Challenges

Known issues with WalkMe + Salesforce

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# What we have seen as known issues

It's not binary. There is no "perfect" set of ingredients. Issues with Digital adoption platforms are a continuum defined across multiple dimensions

## Where WalkMe and Salesforce can have issues

### Relative Business Impact



- 1

**Dynamic DOM** | WalkMe content is likely to break and requires updates in the core design when the DOM is updated – usually a periodic activity in Salesforce (and other cloud ERPs). The updated WalkMe content may not work if Salesforce updates the Production DOM in a phased manner - so the content must be adapted to stay compatible with both DOMs.

○
- 2

**Find Element Algorithm** | Additional work of reselecting the content after changes to the find element algorithm. With Salesforce upgrading its DOM to hide identifiers from its elements and making major changes to the DOM with every major release, it is difficult for DAP applications like WalkMe to maintain the accuracy of their find element algorithm to identify screen elements.

○
- 3

**Settings Deployment to Prod** | A configuration error in the WalkMe settings (100% managed at the back-end by WalkMe R&D Team) can lead to content breaking in Production

○

Classification	Description of Generic issues
SF Release Bug	Salesforce release impact to DOM and WalkMe Find Element Algorithm not automatically updated
Settings Bug	End-user extension not displaying in production for all new users
Settings Bug	Salesforce login failing for end users in test environments because of a WalkMe plugin, and a redirect to a WalkMe VF page
Settings Bug	Publishing on WalkMe failing

Classification	Description of Generic issues
Troubleshoot	Enabling segmentation in the application using standard SF variables for select profiles
Settings Bug	End-user extension stopped working in test environments
Editor Bug	Unable to retrieve old version of the WTs from history
Enhancement	Clarification on jquery rules for enhancing user experience



# Thank you.

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# Annex

Definition of acronyms used across the document

**AMC** : Application Management Center  
**API** : Application Programming Interface  
**BPP** : Business Process Procedure  
**CR** : Change Request  
**CRM** : Customer Relationship Management  
**DOM** : Document Object Model  
**ERP** : Enterprise Resource Planning  
**FAQ** : Frequently Asked Questions  
**HTML** : Hypertext Markup Language  
**KPI** : Key Performance Indicator  
**LMS** : Learning Management System

**OSE** : On Screen Element  
**QA** : Quality Assurance  
**QRG** : Quick Reference Guide  
**R&D** : Research & Development  
**SaaS** : Software as a Service  
**SSO** : Single Sign-On  
**UAT** : User Acceptance Testing  
**UI** : User Interface  
**URL** : Uniform Resource Locator  
**WT** : Walk-Thru  
**VF** : Visual Force